CE DATA ENTRY CHECKLIST

Use this checklist to make sure you are meeting all of the data entry requirements. Make sure you are toggled over to Coordinated Entry to make sure you have access to the correct parts of Clarity.

PPCoC
Pikes Peak Continuum of Care

A PROGRAM OF chp

NEW ENROLLMENT

- ☐ Search client name, dob, ssn, etc in Clarity to determine if they have a record.
- ☐ If not in the system, document an ROI. Written consent is preferred but verbal consent is accepted if the client is on the phone.
- ☐ If not in the system, create a profile for each member of the family and form them into a household.
- ☐ Enroll the entire household into the CE program.
- ☐ Record a Current Living Situation.
- ☐ Record a VI-SPDAT.
- ☐ Refer to Community Queue.
- ☐ Document Contact and Location tabs as appropriate.

UPDATE EXISTING RECORD

- ☐ Edit the existing program record, but only if it is still active. If the enrollment has been exited, start a new enrollment using the steps above.
- ☐ Document a **new** Current Living Situation. (do not edit the old one)
- ☐ If the client is rehoused, enter a CE Event service.
- ☐ If the client is not rehoused, edit the existing VI-SPDAT.

ADDITIONAL DOCUMENTATION/INFORMATION

- ☐ If you know a client is leaving the area or for some reason will not need CE anymore other than being housed, document a CE event service indicating "ineligible for Continuum services"
- ☐ You may help a client obtain documentation they will need- ID, birth certificate, pay stubs, etc. These can be digitally stored in Clarity for retrieval by the housing case worker to reduce wait times for housing.
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