

## Quick Guide: How to determine Coordinated Entry exits from CE System Program

Case managers and program managers at times may need to review coordinated entry information to determine if clients enrolled in their agency’s program(s) have been exited from the Coordinated Entry System Program and are no longer potentially eligible for Coordinated Entry Prioritization. Below are the basic steps to retrieve this information from Clarity by **running a Program Roster report from both their agency’s program(s) and the Coordinated Entry System Program.**

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### Obtaining the Data

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#### Running the Program Roster Report - [GNRL- 106] for your own Agency Steps:

1. **Under your home agency in HMIS** – Visible under your name (locate the small down arrow and select agency).
2. **From the Launchpad** (cube to left of the email icon) - click into Reports



3. **Click on Program Based Reports**

REPORT LIBRARY	
Administrator Reports	1 report(s) ▼
Agency Management	4 report(s) ▼
Agency Specific	1 report(s) ▼
Assessment Based Reports	1 report(s) ▼
Community and Referrals	5 report(s) ▼
Data Quality Reports	3 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	6 report(s) ▼
<b>Program Based Reports</b>	<b>24 report(s) ▼</b>
Service Based Reports	13 report(s) ▼

4. **Select Program Roster Report - [GNRL - 106] and RUN**

[GNRL-106] Program Roster



5. **Choose your Status Parameters**
  - a. Select which program(s) you wish to review:
  - b. Select Status - “Active within Report Date Range”
  - c. Select Report Date Range - to begin & end on tomorrow’s date
  - d. Select Report Output Format - Excel

Status Active within Report Date Range ▼

Report Date Range 
  -

Report Output Format 
 Web Page  PDF  Excel

6. **Submit your request** – the report may take a few minutes to process

**Running the Program Roster Report - [GNRL- 106] for the Coordinated Entry System Agency Steps:**

1. **Navigate to the Coordinated Entry System Agency** - Your ability to switch to the Coordinated Entry System Program is located under your name (locate the small down arrow and select agency).
2. **From the Launchpad** (located next to the email icon) - click into Reports
3. **Click on Program Based Reports**
4. **Select Program Roster Report - [GNRL - 106] and RUN**
5. **Choose your Status Parameters –**
  - a. Select Program – “Coordinated Entry System Program”
  - b. Select Status - “Active within Report Date Range”
  - c. Select Report Date Range - to begin & end on tomorrow’s date
  - d. Select Report Output Format - Excel
6. **Submit your request** – the report may take a few minutes to process

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### Data Analysis

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- 1) Download both reports to a secure computer with Excel.
- 2) Open the supplied “CESP-Agency\_Program-Crosswalk\_Template.xlsx” workbook.
- 3) Open your agency’s Program Roster Report - [GNRL- 106]
  - a. Verify you are viewing the Data sheet section of the workbook:
 

Data | Program List
  - b. Copy the entire contents of the Data sheet by clicking on any cell and typing Ctrl+A twice and then Ctrl+C
- 4) Navigate to the “CESP-Agency\_Program-Crosswalk\_Template.xlsx” workbook
  - a. Verify you are viewing the “Agency\_Program” sheet section of the workbook:
 

Agency\_Program | CES\_Program | Results
  - b. Paste the contents of the clipboard by clicking on any cell and typing Ctrl+A and then Ctrl+V
- 5) Close your agency’s Program Roster Report - [GNRL- 106]
- 6) Open the Coordinated Entry System Program’s Program Roster Report - [GNRL- 106]
  - a. Verify you are viewing the Data sheet section of the workbook:
 

Data | Program List
  - b.
  - c. Copy the entire contents of the Data sheet by clicking on any cell and typing Ctrl+A twice

and then Ctrl+C

- 7) Navigate to the “CESP-Agency\_Program-Crosswalk\_Template.xlsx” workbook
  - a. Verify you are viewing the “CES\_Program” sheet section of the workbook:



- b. Paste the contents of the clipboard by clicking on any cell and typing Ctrl+A and then Ctrl+V
- 8) Close the Coordinated Entry System Program’s Program Roster Report - [GNRL- 106]
- 9) Navigate to the “CESP-Agency\_Program-Crosswalk\_Template.xlsx” workbook
  - a. Verify you are viewing the “Results” sheet section of the workbook (please note this sheet is locked for editing, you may copy data out of it using Ctrl+C):



- 10) Review the clients enrolled in your agency who are not enrolled in the Coordinated Entry System Project, they are identified under Column C

### Data Quality Check

If you notice that your client has been exited from CE System Program that would be due to one of two factors: they exited to a housed destination, or their enrollment was closed due to inactivity. In both situations, follow the below steps:

1. Review the exit destination to determine exit reason.
2. If still in need, create a new CE Program Enrollment using the steps in the CE Assessor Manual.