**Coordinated Entry Instructions for Adding a NEW Entry/Exit**

Always **Enter Data As (EDA) to the correct provider**

1. You can use **Current System Date**; you do not need to be in backdate mode to carry out this task. (Pro tip: You don’t need to be in backdate mode for any task on the Entry/Exit tab!)
2. **Enter the client’s record** using the Client ID
3. Click on the **Entry/Exit tab**
4. Click on **Add Entry/Exit\* – \*Only** if you do not already see an open entry to a provider labeled “…SMC- Coordinated Entry Assessment” or something similar. If they already have an entry, skip to “Instructions for adding an Interim Update”

5. Household Members: Check the box next to the name of every household member identified by the head of household at the time of assessment.
6. In the next pop-up:
	1. **Provider**: Leave as is; should match your Coordinately Entry provider
	2. **Entry Type**: Select **Basic**.
	3. **Project Start Date**: date the client was assessed
7. Click on **Save and Continue**.
8. Complete assessment. If any fields are already filled in, skip them ONLY if what is written is still accurate. Do not worry about messing up someone else’s data. In the E/E tab, this is not a concern – you are only changing data in your entry/exit.
9. Click **Save and Exit.** PSA: Never click on Verify and Save!

**Instructions for Adding an Interim Update**

4a. Locate the open CE Entry/Exit, and click on the Interims icon



5a. Click on **Add Interim Review**

6a. In the next Pop-up

**Interim Review Type**: Select **Update**

**Review Date**: Enter the date you talked to the client

7a. Click on **Save and Continue**

8a. Ensure there is an active row in the CE Assessment sub-assessment, and that the Prioritization Status says **Placed on Prioritization List**.



9a. Update any fields in the CE Assessment that need updating including:

* 1. Contact info
	2. Income
	3. Housing history
	4. Current Living Situation
	5. Assessing Chronic Homelessness question series

10a. Click on **Save and Exit.** PSA: Never click on Verify and Save!