Model

- [ ] Determine what agencies and program will collect data

Screens

Decide on an enrollment and exit screens for programs collecting coordinated entry data.

- [ ] HUD standard or minimum screens or custom screens
- [ ] Configure screens if needed

Templates

- [ ] Add enrollment screen to the template
- [ ] Add exit screen to the same template
- [ ] Enable the Current Living Situation in the template

Assessments

Decide on an assessment(s).

- [ ] Use the pre-configured VI-SPDATs or create a custom assessment
- [ ] CE Toggle= On
- [ ] Eligibility Engine= On
- [ ] Configure an assessment processor
- [ ] Select the Assessment Processor on the assessment screen
- [ ] Enable assessment screen settings (i.e., Recent Assessment Warnings)
- [ ] Customize 'Assessment Location' field in the Field Editor
- [ ] Enable CE assessments for agencies doing CE data collection
  - [ ] Set Assessment Usage to Programs Only
  - [ ] Enable cascading, if desired

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Coordinated Entry Configuration Checklist

The Coordinated Entry Configuration Checklist guides you through configuration for the commonly used workflows and aligns with the HUD Coordinated Entry Data Standards. For more information about any of the components below, please visit the Help Center.

Programs

For program completing CE assessments:

- [ ] Configure/update programs that will collect CE data
- [ ] Add the CE template to the program
- [ ] Enable program settings
  - [ ] Consider using:
    - [ ] Auto-Exit due to Inactivity
    - [ ] Auto-Exit to Permanent Destination
    - [ ] Cascade Assessment Data
- [ ] Add the CE assessments to the program
  - [ ] Add assessments to the *Program Assessment* section
  - [ ] Add assessments to the *Cascade Assessments* section

For programs receiving CE referrals:

- [ ] Public Listing: Public
- [ ] Project Receives CE Referrals: On
- [ ] Add Community Queues to the program
- [ ] Eligibility toggle: Off unless using eligibility
- [ ] Add Responsible Staff Members
- [ ] Availability: set to Full or Limited Availability

Coordinated Entry Events

- [ ] Enable Inferred CE Events under Referral Settings (if applicable)
- [ ] For programs completing CE data collection, Coordinated Entry Events: On
- [ ] Configure manual events for programs entering manual events

Access Roles

- [ ] Create or edit access roles
- [ ] Ensure access roles have the correct permissions to perform CE work

Referral Settings

- [ ] Edit or create Referral Settings
- [ ] Enable Community Queues, if desired
- [ ] Enable multiple queues, if desired

For more information about Community Queue configuration, please see the Community Queue Configuration Checklist.