KCRHA
King County Regional Homelessness Authority

Seattle/King County Coordinated Entry Housing Assessor Manual V9

Table of Content

Vision

Coordinated Entry strives to ensure that people experiencing homelessness have fair and equal access to available housing resources. CE matches the needs, strengths, and vulnerabilities of the individual or household with the corresponding available housing resources and appropriate level of service assistance. Using standardized methodology and a common triage protocol, CE aims to incorporate the principles of a system-wide housing first approach while prioritizing those with the highest vulnerabilities and service needs.

Coordinated Entry is designed to:

- Allow anyone who needs assistance during a housing crisis to know where to go to get that assistance in a standard and consistent way
- Ensure that individuals and households who are experiencing homelessness gain access as efficiently and effectively as possible to available community interventions
- Prioritize individuals and households for limited housing resources based on need and vulnerability
- Provide clarity, transparency, consistency, and accountability throughout the triage and referral process for individuals and households experiencing homelessness, community partners, and homeless and housing service providers; and
- Facilitate exits from homelessness to stable housing as rapidity as possible

For an overview of King County's CE system, FAQs, the CE Policies and Procedures, updates, forms, trainings and resources in various languages go to https://kcrha.org/resources/about-coordinated-entry/

An effective coordinated entry process is a critical component to any community's efforts to meet the goals of *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness*. This policy brief describes HUD's views of the characteristics of an effective coordinated entry process.[1]

Roles and Responsibilities

CE Trainer: The CE Assessor Trainer role is fundamentally for the communication between CE and the partner agency. Ensures on-site training is completed as designated in the CE assessor manual, and monitors and responds

[1] https://www.hudexchange.info/resources/documents/Coordinated-Entry-Policy-Brief.pdf

to CE assessor related data quality issues. The CE Trainer can also hold other roles, such as HMIS Agency Lead. Agencies can have more than one CE Trainer but must have at least one.

CE Trainer staff's role is specifically designed to:

- Communicate to CE when there are new staff who have completed their training and need access to the Coordinated Entry System Agency
- Oversee and coordinate CE related activities at your agency
- Work closely with the HMIS Agency Lead to manage user accounts regarding additional agency access to Coordinated Entry System Agency
- Provide leadership and guidance to supervisors at their agency on completing the training requirements
- Attend Quarterly HMIS Agency Leads & Liaison Meetings *(January , April, July, & October)*
- Distribute new information and announcements from HMIS System Administrators and Coordinated Entry to relevant areas of their agency
- Notify CE and agency lead if staff are changing roles and no longer assessors or leaving the agency within 24 hours of notification
- Monitor ongoing user compliance with the annual CE Assessor Refresher training
- Notify CE if they are leaving their role as CE Trainer and designate a new CE Trainer or interim CE Trainer
- In collaboration with the HMIS Agency Lead, regularly review and respond to CE assessor data quality reports and dashboards, ensuring errors are under 5%
- Request Clarity training accounts as needed for assessors from Bitfocus Helpdesk 206-444-4001 x2

Housing Assessors – All Housing Assessors will be responsible for completing the CE Housing Triage Tool (HTT) and entering information into the Homeless Management Information System (HMIS). Housing Assessors are located at the Regional Access Points (RAPS) or are associated with existing community-based service agencies.

All Housing Assessors are required to complete CE Housing Assessor Training and attend one Assessor Refresher training in a 12-month period. Once trained, the new Housing Assessor will complete the CE Housing Triage Tool with individuals and households in need of housing that are vulnerable and have no other housing alternatives outside of CE. Regional Access Point (RAP) staff will discuss diversion options and employment navigation before completing a triage tool to assess for options outside of CE. As needed, the Housing Assessor will connect the household with a Housing Navigator. Housing Assessors' responsibilities include, but are not limited to the following:

- Operating as the initial contact for the CE and communicating eligibility for CE.
- Exploring resources other than homeless housing programs, such as diversion and/or employment/education.
- Administering the CE Housing Triage Tool when no other housing alternative can be identified.

- Communicating with households about next steps and types of resources the household may be referred to.
- Notifying households about other services/resources, programs they may be eligible for outside of CE, including housing through YFHPI (also known as BSK), applicable prevention services, BHRD, Section 8, emergency housing, King County affiliated D.D. housing, and other community-based resources (employment services, behavioral health, domestic violence services, etc.)
- Responding to requests by the *Coordinating Entity,* as appropriate.

Housing Assessors that have completed training must conduct at least one Housing Triage Tool per month or 12 assessments per year and enter the information properly into HMIS or assessment access in HMIS will be discontinued.

Regional Access Points (RAPs) - Agencies selected to serve as RAP sites are responsible for ensuring that all households experiencing homelessness or in need of homeless prevention have prompt access to services including Diversion/Diversion, connections to employment services, or other supports that will assist in solving the housing crisis, or to complete a CE Housing Triage Tool when Diversion or other resources are not an option. It is also the responsibility of RAP staff to ensure that communications with households are conducted in a safe, confidential, and welcoming environment.

Coordinating Entity- King County Regional Homelessness Authority (KCRHA) is the Coordinating Entity for CE. The Coordinating Entity is responsible for the oversight and direction of CE, including but not limited to the following:

- Creating and widely disseminating materials regarding services available through CE and how to access those services
- Designing and delivering training at least annually to all key stakeholder organizations, including but not limited to the required training for Housing Assessors and the Regional Access Points
- Ensuring that pertinent information is entered into HMIS for monitoring and tracking the process of referrals including vacancy reporting and completion of assessments
- Managing the client grievances process in compliance with the protocols described in CE Policies and Procedures
- Designing and executing ongoing quality control activities to ensure clarity, transparency, and consistency to remain accountable to households, referral sources, and homeless service providers throughout the coordinated access process; Making periodic adjustments to the CE as determined necessary; and updating policies and procedures

CE Housing Triage Tool Introduction

Coordinated Entry assessors will complete a two-question Housing Triage Tool, labeled in HMIS as Seattle/King County Coordinated Entry- Housing Triage Tool (HTT). There will no longer be separate Housing Triage Tools for each household type —rather, the assessor will indicate in the Housing Triage Tool which household type applies. Households with a Housing Triage Tool completed prior to this change do not need to complete a new Housing Triage Tool.

Since October of 2020, Coordinated Entry has been prioritizing households based on COVID-19 guidance issued by HUD and the Washington State Department of Commerce. Coordinated Entry currently prioritizes Families, Single Adults, and Young Adults who are most disproportionately impacted by COVID-19, using factors determined by Seattle King County Public Health. For more information, please see the COVID Prioritization Presentation on the KCRHA website.

Language support

CE provides services in the language preferred by the household when completing a Triage Tool and when making a housing referral. If staff are unable to provide in-person interpretation, access to interpretation services is also available through a phone service.

Housing Assessor Training Process

For Housing Assessors to be able to complete the Housing Triage Tool, they must follow the below process. This is to ensure a uniform method of training of Housing Assessors throughout the King County homeless response system. The parties involved include the agencies themselves where Housing Assessors are situated, and the CE training staff. Specific agency roles include CE Trainer(s) and Housing Assessors.

New Housing Assessors must complete three steps to become an approved CE Housing Assessor.

Step 1: Watch the **CE video**. This is an overview of the CE system and processes.

> **https://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx**

Step 2: All Clarity Human Services (HMIS) users are required to complete **Clarity General Training** before they will be granted access to the database. The Clarity General Training is a recorded webinar that can be completed at any time. http://kingcounty.hmis.cc/training/clarity-general-training/

Once a new user has completed the Clarity General Training, their HMIS Agency Lead must contact the Bitfocus helpdesk at (206) 444-4001 ext. 2 or kcsupport@clarityhs.com to request an account and log in for the new user.

Step 3 Attend the next available CE online (live webinar) **Assessor Credential Training** *(hosted monthly- register for the next one here)*.The Assessor Credential Training sessions are two-hour sessions to ensure data quality and continuous quality improvement, as well as reviewing how to conduct trauma-informed assessments, safety planning, and cultural and linguistic competency. These training sessions are scheduled once per month on a variable schedule.

Step 4 Following Appendix VIIII Training Checklist for New CE Assessors, CE Trainer must ensure the new Housing Assessor understands all components of the checklist. Details on each section can be in addition, the following must also be covered;

- Ensure the new Housing Assessor is knowledgeable of resources outside of CE to address the clients immediate triage needs including connections to shelters, food resources, behavioral health, health services, and other emergency services
- Ensure that the training requirements are not only met, but that the new assessor is proficient in the process and data entry requirements
- Ensure the Housing Assessors understand the CE Code of Ethics/Confidentiality guidance. **See Appendix X Code of Ethics/Confidentiality.**

Once the above are completed, the Housing Assessor will notify their CE Trainer at their agency. The CE Trainer will then request via Google Form: (https://forms.gle/GzqVeBCoin8ZcW1B7) to CE.

To retain assessor access in HMIS, all Housing Assessors that have completed training must conduct at least 1 CE Housing Triage Tools per month, properly record its results within the HMIS, and participate in a minimum of 2 refresher trainings per year (12-month period).

Administering the CE Housing Triage Tool

All Housing Assessors are trained to complete the Triage Tool in a standardized way with similar messaging so that we can communicate and implement the triage process and its results clearly and consistently across the community. This ensures that the benefits of participating in the triage process are described clearly to encourage people to participate, and that individuals understand that participating does not guarantee (and may not result in) housing. It is also important that individuals receive a clear understanding that their information will only be shared for the purposes of securing housing.

The process for administering a CE Housing Triage Tool is outlined in the following steps.

Step 1. Introduction

When a Housing Assessor is meeting with a household, they should be sure to cover the following components:

- Name of the Housing Assessor and their agency

- Time duration of the appointment
- If at a Regional Access Point (RAP), begin with Progressive Engagement and/or employment options (see step 2 below)
- If a Triage Tool has not been conducted, move on to administering the Triage Tool, if a triage tool has already been conducted, or a child has entered into a previously single household, see the **Updating an Existing CE Housing Triage Tool** section of this manual.
- Discuss the purpose of the CE Housing Triage Tool
- Explain where the information is stored within the Homeless Management Information System (HMIS).
- Explain that information will be shared with providers connected to Coordinated Entry so that the individual does not need to complete the tool multiple times.
- Explain again at the end of conducting the Tool that this is not a guarantee of housing due to the lack of resources in our community.
- If it is clear based on the results of the assessment that a housing resource through CE will not be a viable option, re-approach the subject of Diversion/Problem-Solving.

See Appendix I – Messaging for a sample of the opening script

Step 2. Discuss opportunity for Diversion Problem-Solving services

All Housing Assessors at the Regional Access Points should discuss Diversion services with every household before completing the tool to see if the household can identify an immediate temporary or permanent solution to homelessness outside of the homeless services system.

If the household is able to identify a housing plan, the Housing Assessor should foster effective participant focused "problem solving" conversation. These conversations need to include open ended questions, motivational interviewing, and trauma informed care.

Step 3. Client Consent to Data Collection and ROI

If a household agrees to participate in the coordinated entry process, then they are asked to sign the Homeless Management Information System (HMIS) Client Consent to Data Collection and Release of Information (ROI)[2] before proceeding to complete the Housing Triage Tool.

> See Seattle/King County HMIS User Manual for complete instructions on:
> **Privacy & Security**
> **Consent Refused Data Entry**

[2] The paper version of the HMIS Client Consent to Data Collection and ROI, and in alternative languages can be found at http://kingcounty.hmis.cc/client-forms/

HMIS Consent is needed for *each* participant, ***including children***. Parents need to sign a consent for any child in their household who is under age 18. Every adult in the household, including children in a household that are over the age of eighteen, must sign the consent for themselves.

Personal information is not entered in HMIS for people who are. 1) receiving services from domestic violence agencies; 2) currently fleeing or in danger from a domestic violence, dating violence, sexual assault or stalking situation; 3) are being served in a program that requires disclosure of HIV/AIDS status (i.e., HOPWA); or 4) under 13 with no parent or guardian available to consent to enter the minor's information in HMIS. **Housing Assessors should follow the refused Consent instructions outlined below under "Refused Consent**."

Housing Assessors are required to upload either electronically or by PDF, all applicable Releases of Information (ROI) into the HMIS database for every consenting member of each household they assess.

The same HMIS Release of Information is utilized by all participating agencies that use HMIS. A household only needs to consent at one agency and the most recent consent applies to all HMIS Partner Agencies. Housing Assessors should help households understand what HMIS is, the purpose of the ROI form, the information collected, and that households are giving permission to have their information collected and shared with Partner Agencies that help King County provide housing and services. A current list of Partner Agencies is at http://kingcounty.hmis.cc/participatingagencies/.

The HMIS information shared will be used to help households get housing and services. It will also be used to help evaluate the quality of housing and service programs. The Partner Agencies may change over time.

See Appendix III – HMIS Client Information Sheet

Department of Veteran Affairs ROI

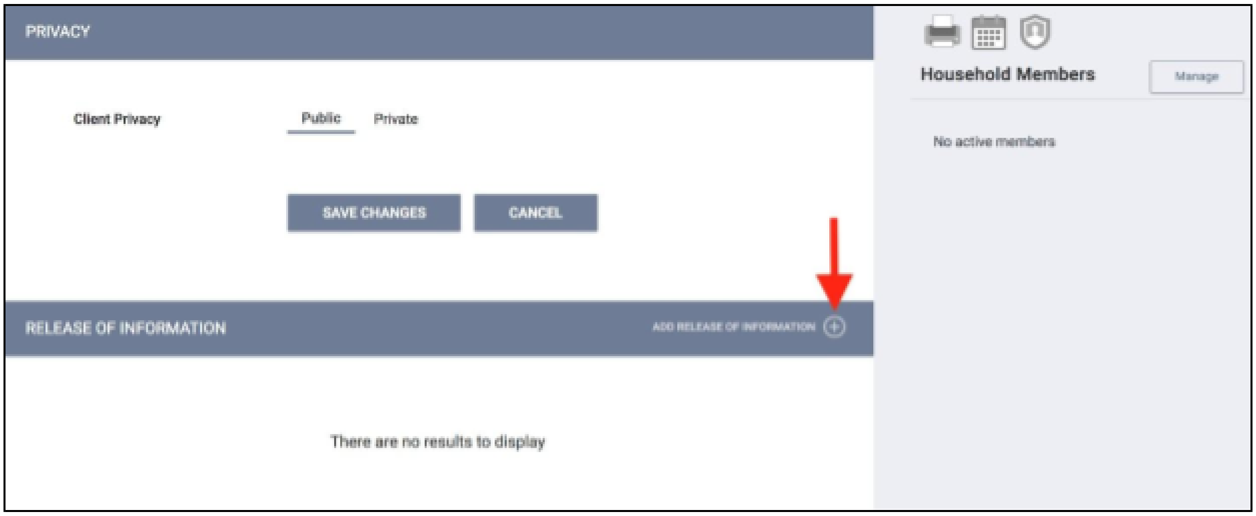
If the Head of Household (HOH) identifies as a Veteran or discloses that they have served in the United States military, the Housing Assessor should ask the Head of Household to sign a Department of Veteran Affairs ROI. By signing this ROI, the household can be discussed at the Veteran's By Name List Case Conferencing meeting. The purpose of this meeting is intake, housing placements, referrals, and case management coordination. If the Housing Assessor discovers that another adult in the household, such a spouse or parent, is a Veteran, then the Housing Assessor may want to obtain the VA ROI for that person and treat them as the HoH for the purposes of a housing assessment.

Instructions on how to sign an ROI in HMIS

Once you have created a new client profile, you can add the ROI. You will need to follow these steps:

To upload the ROI, click on the "Shield" icon, next to the client calendar and print icons. This will open the Privacy/Release of Information screen.

Next, click the button “Add Release of Information.”

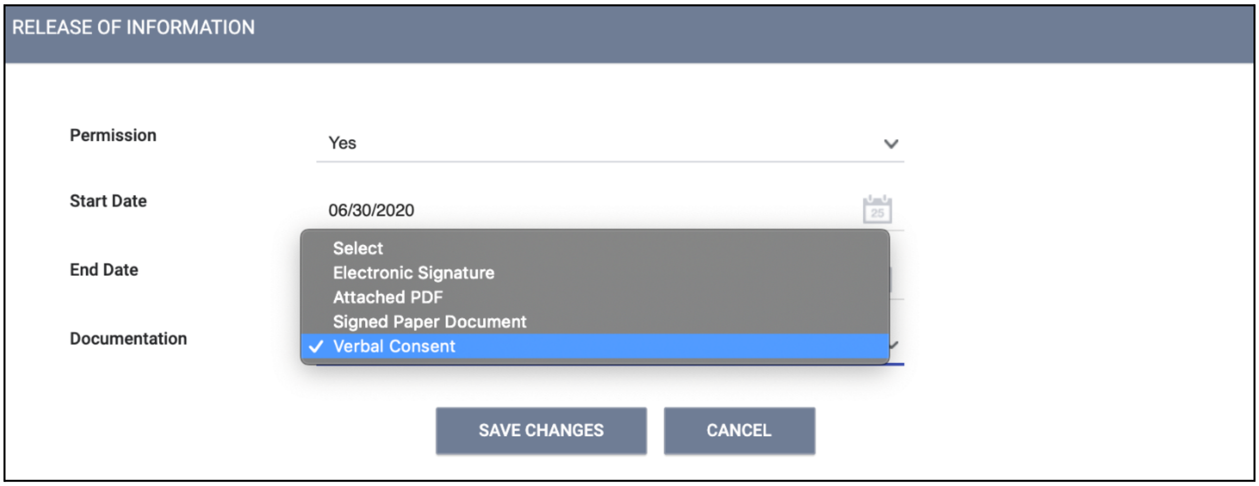


The Release of Information Screen will appear. Complete the following data fields:

- Name of the Housing Assessor and their agency. Permission: Yes = Client provided consent or Permission: No = Client did not provide consent
- Start Date-This is the date that the client signed the ROI. The “Start Date” defaults to today’s date, but it must be configured to reflect the actual date the ROI was signed by the client, if it was not signed on the current day.
- End Date-This is the date that the ROI will expire. It will default to seven years from the start date. This is the correct default date for King County.

  Note: Only one ROI per active start/end date range is permitted. The system should not allow you to upload a second ROI within the same date range.

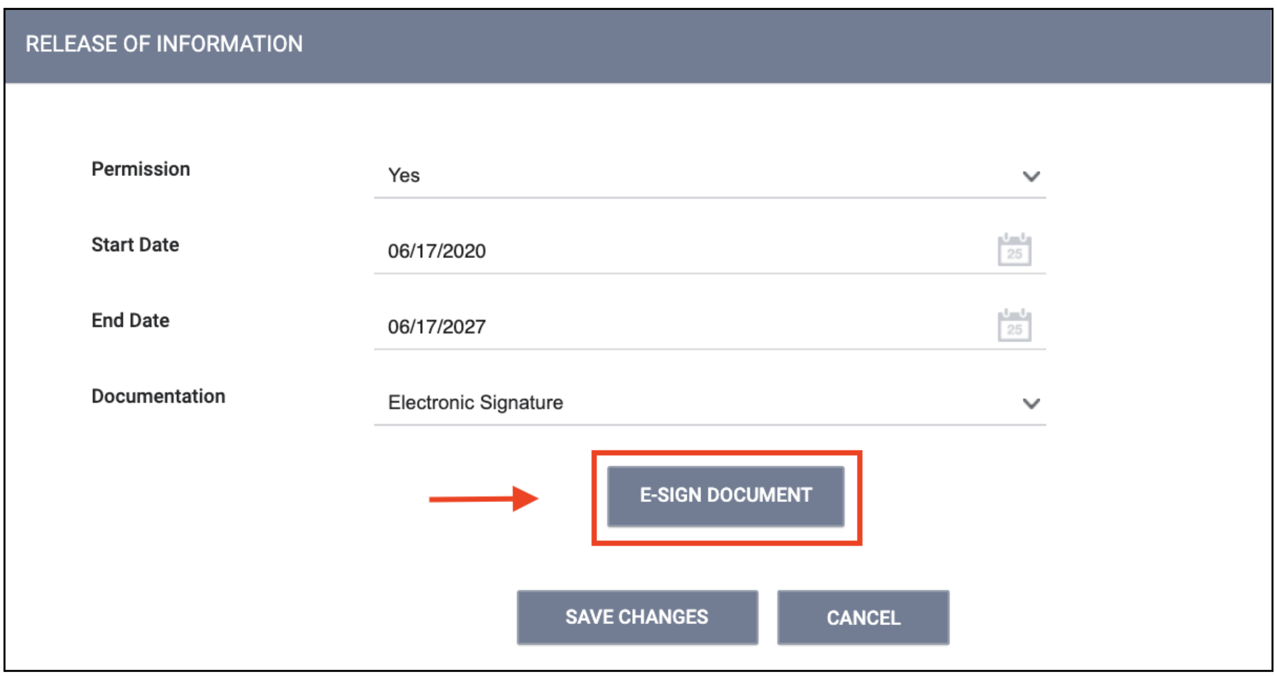
- If the household signs a paper copy of both the HMIS ROI and also signs the Veterans Affairs ROI, the Housing Assessor can scan and upload those as one PDF. If the household signs electronic HMIS ROI and a paper Veterans Affairs ROI, upload the scan (PDF) of the Veterans Affairs ROI in the client files tab.
- Documentation- Select either “Electronic Signature” or “Attached PDF.” (Note: at certain times, such as during the COVID-19 crisis, a household may be able to consent by phone or only by paper form without the Housing Assessor uploading the PDF temporarily. At those times, Housing Assessors may see different choices in the Documentation list of options. Stay apprised of policy changes by regularly reviewing the documentation on the King County HMIS Website (king county.hmis.cc)

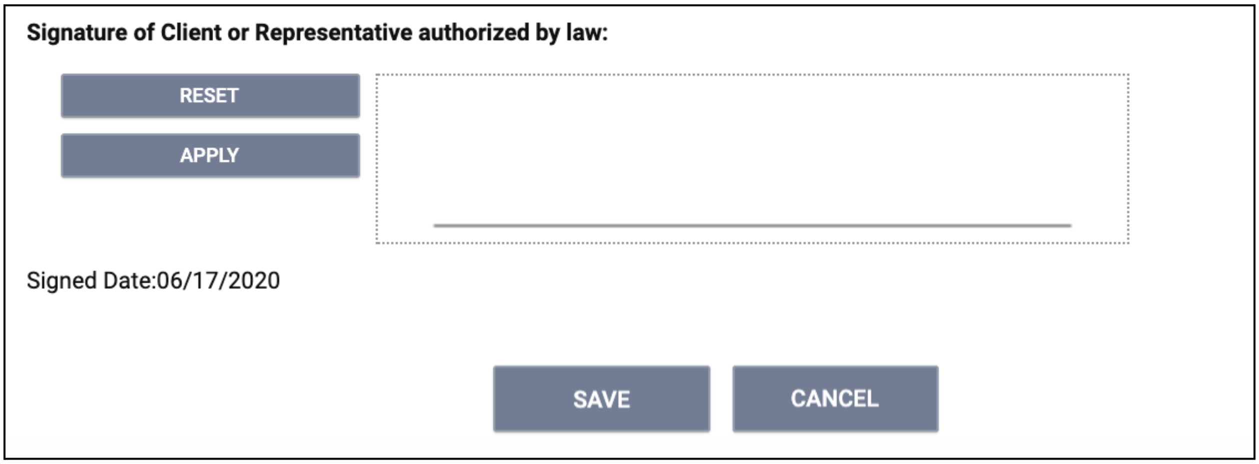


Electronic Signature of ROI

Clients can sign HMIS Client Consent forms directly in HMIS using a touch screen on a mobile device or a mouse on a computer. To access the electronic consent, select “Electronic Signature” for the documentation type and the “E-Sign Document” option appears.

When you click on “E-sign Document,” a box with the HMIS Client Consent and Release of Information appears. The signature box, as well as the system-generated date of signature and client name will appear.



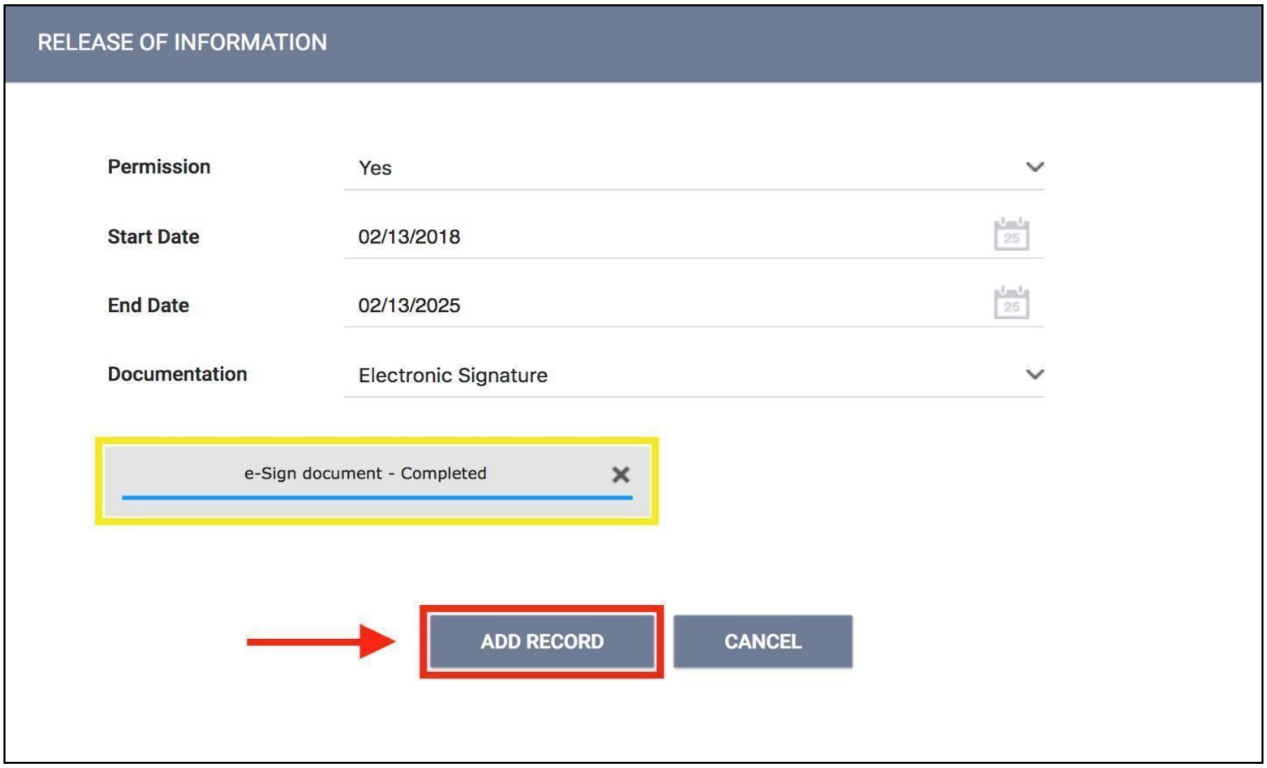


Once the household has signed, click "Apply"

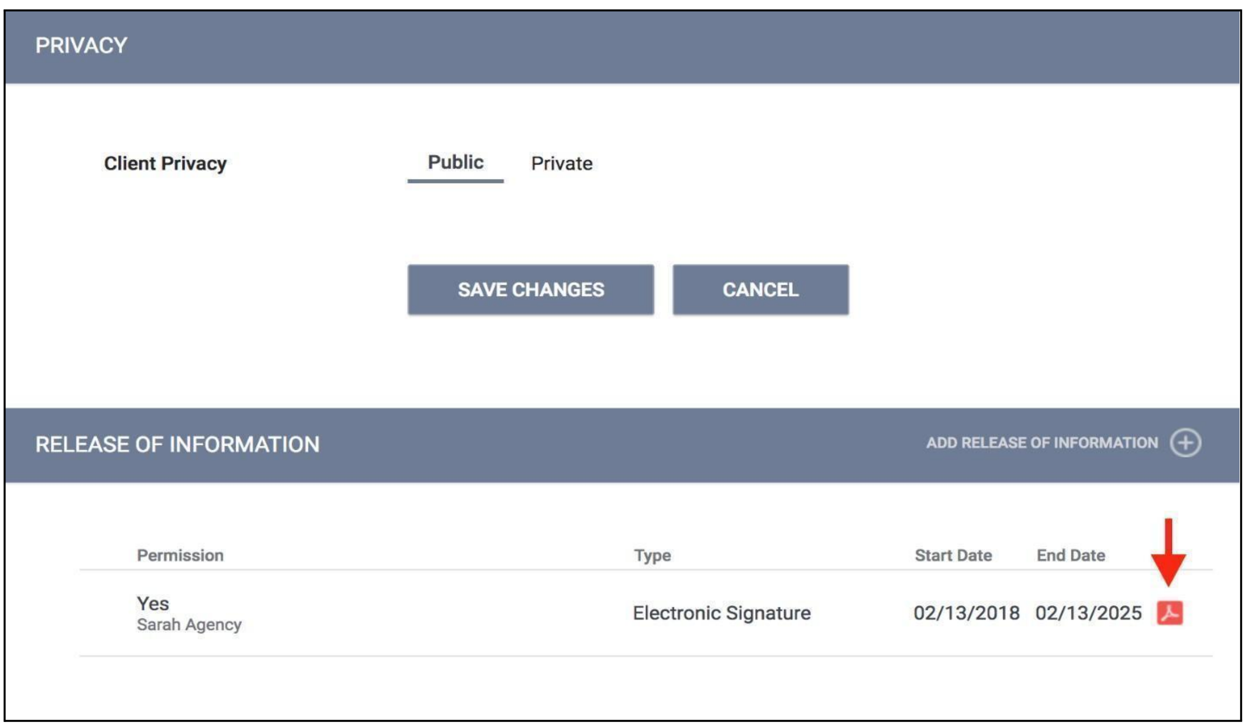
Once you select "Apply," the option to apply disappears. If the household wants or needs to resign after you select "Apply," you can select "Reset" and the signature will be erased and the option to apply will reappear.

After you apply the signature, select "Save." The system will not permit you to save a signature without first applying that signature to the form.

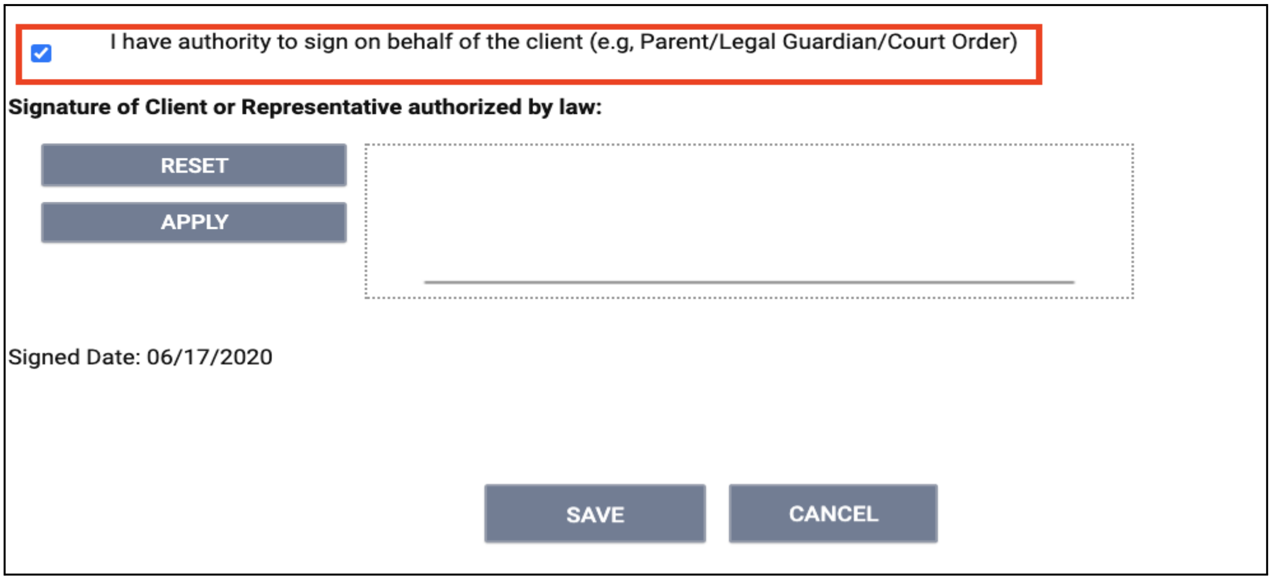
Once a signature has been saved, the system will indicate that the e-signature is complete. To finalize the electronic consent, select "Add Record."



This record can be viewed and printed from Privacy/Release of Information screen by selecting the icon beside the release dates.

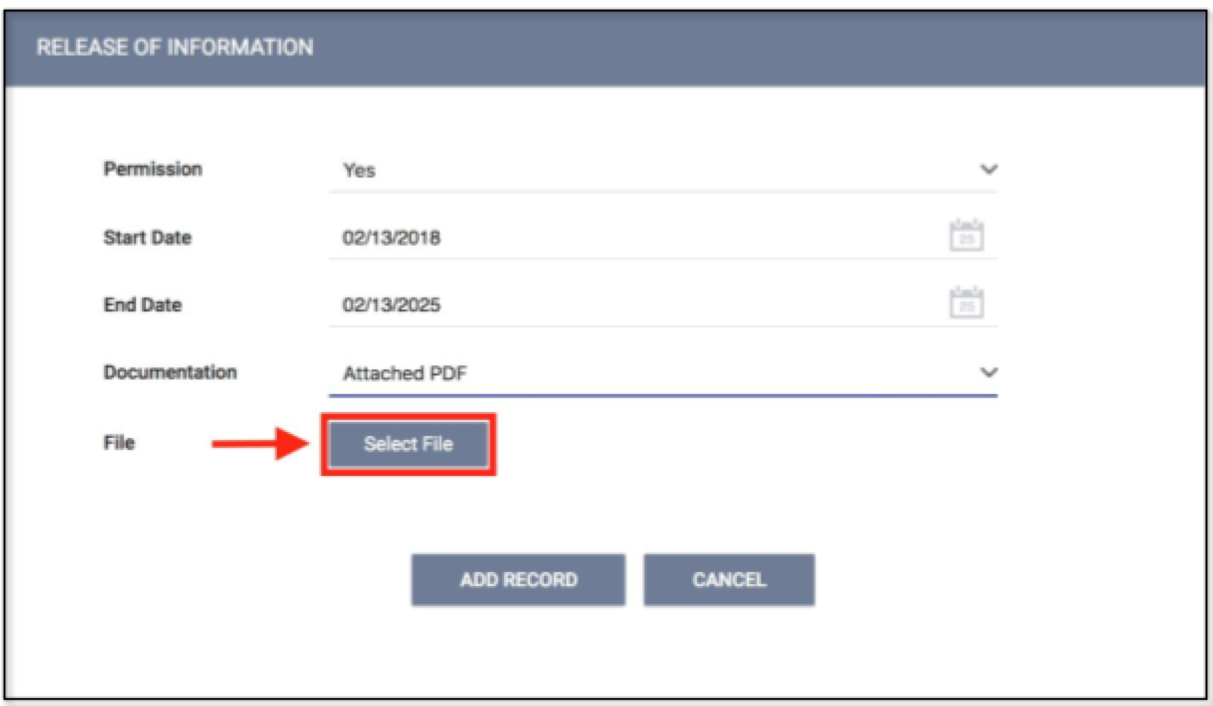


Note: To complete an electronic ROI for any minors in a household, open up the child's profile in HMIS, follow the steps listed above and have the parent/guardian sign the electronic consent associated with the child's profile. By accessing the electronic consent from the child's profile, the consent will have both the signature of the parent/guardian as well as the name of the child at the bottom of the signed consent form.

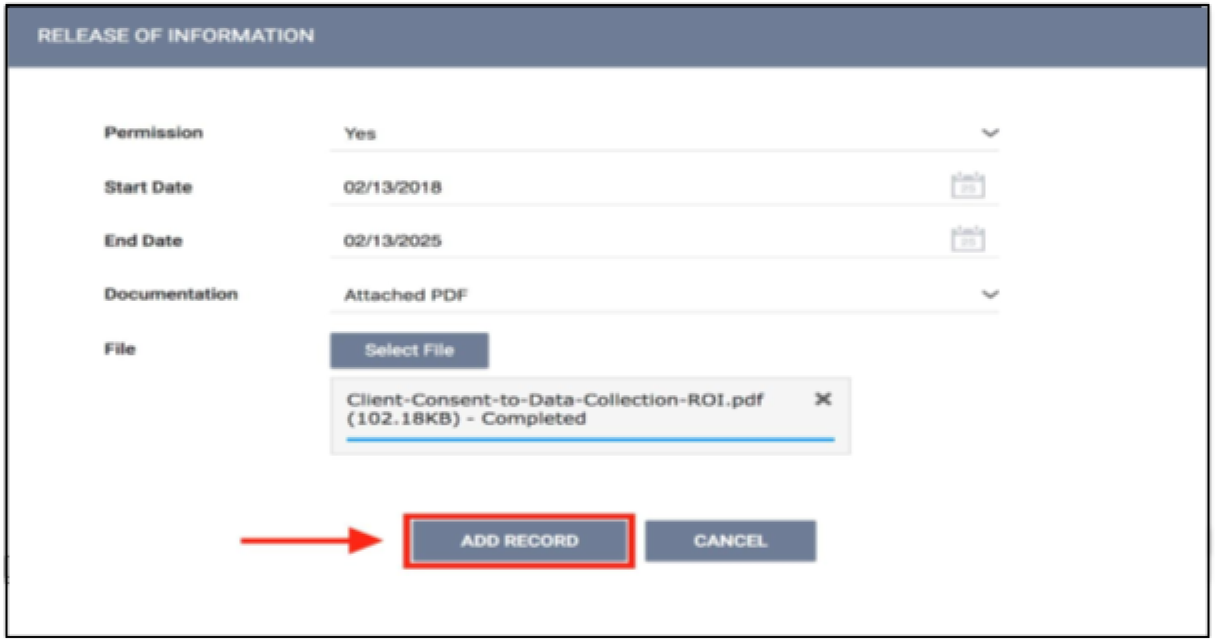


Paper ROI

To upload a paper release, select “Attached PDF” for the documentation type and the “Select File” option appears.



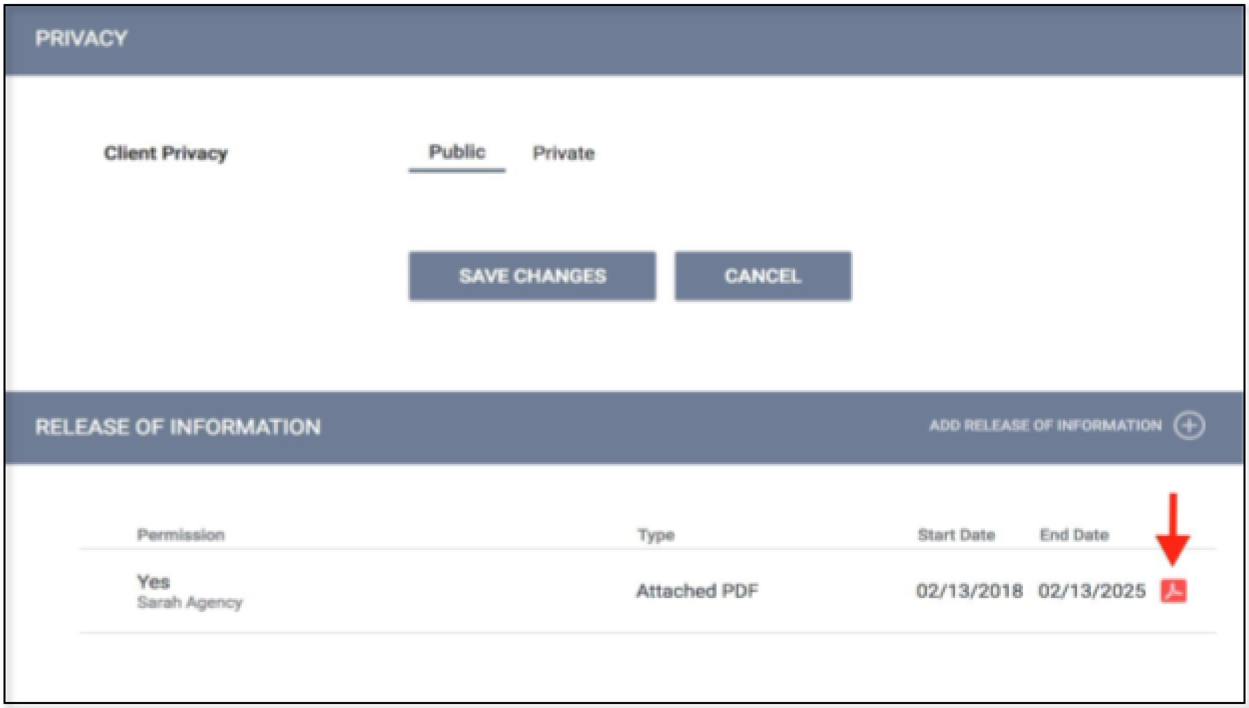
After you have selected the file that you want to upload, the file name will appear on the screen and the system will indicate that the upload was completed. Once this occurs, select “Add Record.”



Phone Release

Due to Covid-19, until further notice, consent can be collected over the phone by documenting "Verbal Consent"

This record can be viewed and printed from Privacy/Release of Information screen by selecting the icon beside the release of information end date



Declined/Refused Consent

Households that refuse consent will have their identifying information held by CE outside of the database. Individuals who do not sign the ROI will be entered into HMIS as "de-identified," meaning their profile will not contain identifying information about this household. The household will be assigned a Clarity unique identifier number when the Profile is entered into HMIS. Housing Assessors are encouraged to give the household their ID number so the household can provide it to any agency they are working with.

When creating a new de-identified profile manually, Housing Assessors must follow the exact steps outlined in the Consent Refused data entry protocol. Instructions on how to create a de-identified profile using the Consent Refused toggle in HMIS can be found in the *Consent Refused Data Entry* section of the Complete Seattle: King County HMIS End User Training Manual found on the Forms & Guides page of the King County HMIS Website (kingcounty.hmis.cc). Once the profile has been created, the Housing Assessor needs to send the identifying information to the CE team.

If an individual does not consent to enter their information in HMIS, go to the page to add a release of information, select "No" for permission and add the record.

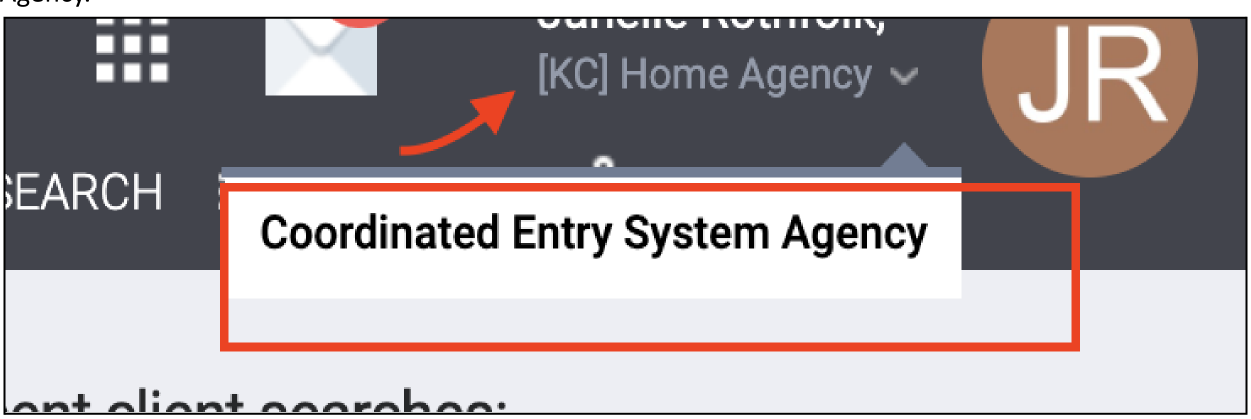
How to send non-consenting information to CE:

Send an encrypted email to alex.ebrahimi@kcrha.org with the subject line “De-Identified Household” listing all the above information for each family member (unique identifier, name, DOB, gender, and contact info).

Step 4. Switch to Coordinated Entry System Agency

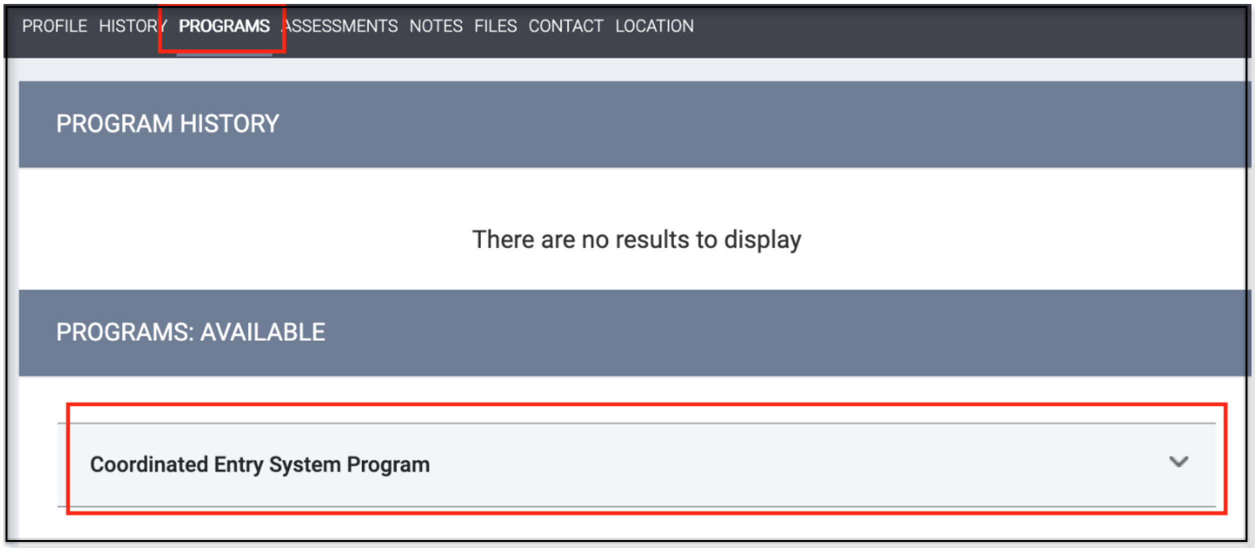
Due to new HUD data standards guidelines, starting April 1, 2020, Coordinated Entry Assessments are now created and updated in the Coordinated Entry System Agency along with additional data entry requirements. (Note: VAWA/Victim Service Provider agencies are the only exception to this practice as Housing Assessors at those agencies enter CE Housing Triage Tools and related services activities under a coordinated entry program in their home agency.) All trained Housing Assessors will have access to the Coordinated Entry System Agency. Housing Assessors must *switch* to this agency in HMIS for all Coordinated Entry related work. They will use the down arrow located under their username to switch back and forth between their own agency and the Coordinated Entry System Agency.

See Seattle/King County HMIS User Manual for complete instructions on:
Searching for Clients
Adding A New Client
Client Consent

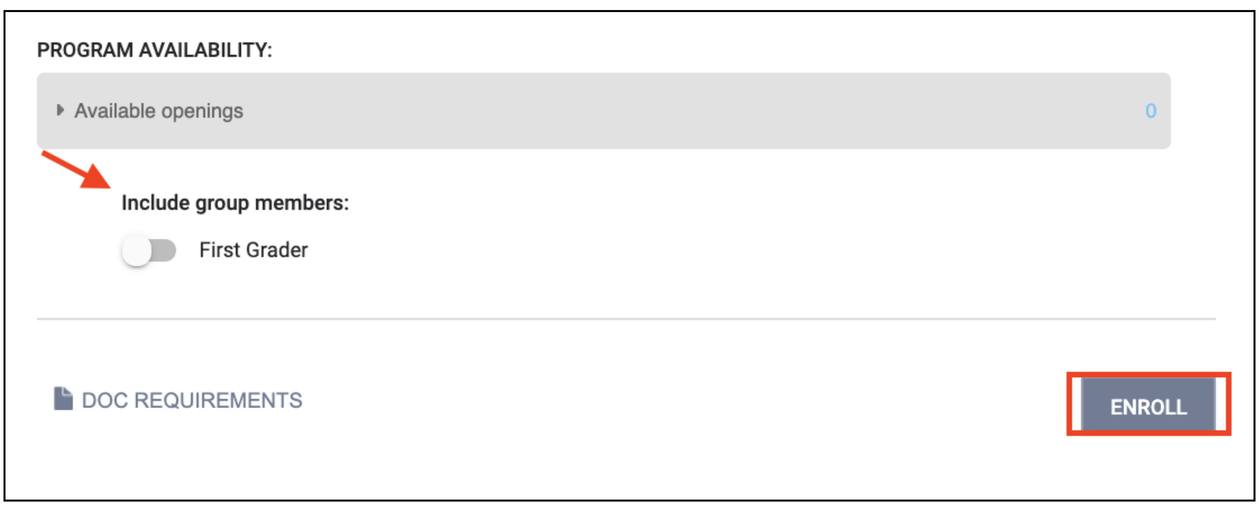


Step 5. Create a Coordinated Entry System Agency Program Enrollment

A program enrollment into the Coordinated Entry System Program will then be created. Single adults without minor children will have their own enrollments and not be enrolled with any other adults as a group. For Coordinated Entry enrollments, only families with minor children at the time of assessment will be entered as a group. All households of all compositions should be managed at the global profile level.



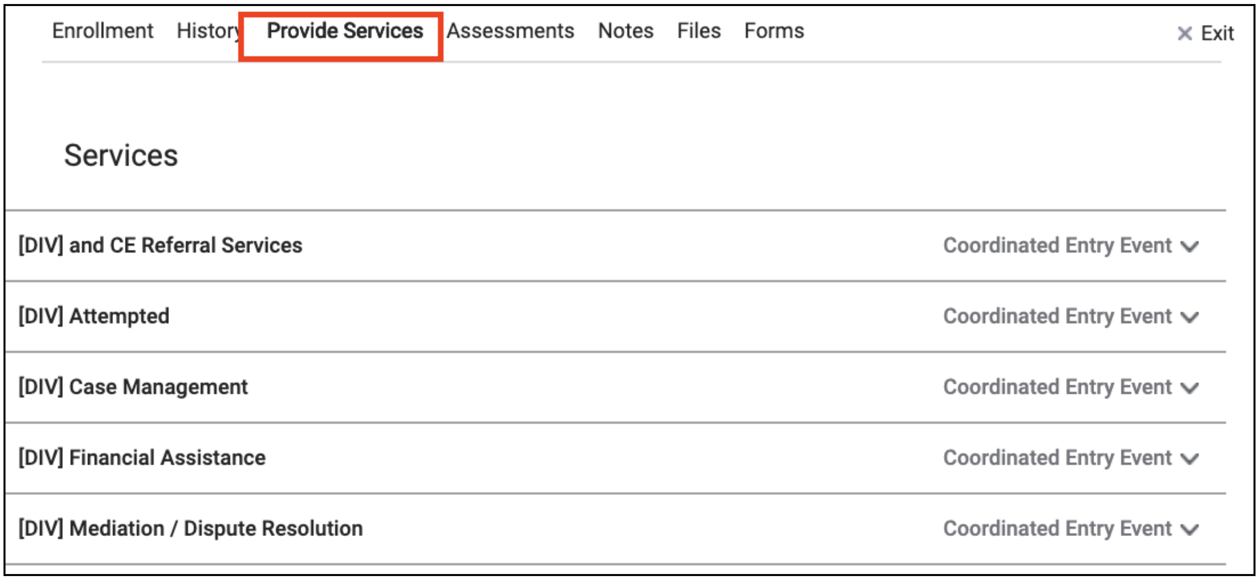
Example of a group enrollment. Toggle on the additional group member. If you do not see the group member, then you do not have them "managed" or linked together at the global profile level yet.



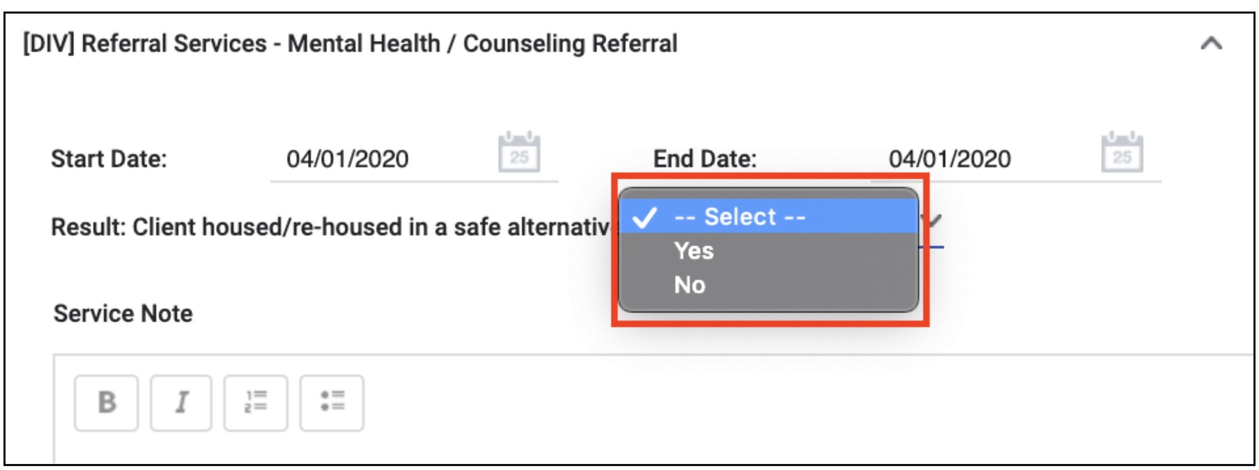
Follow the enrollment screen prompts and answer all questions as completely as possible.

Step 6. Provide Coordinated Entry Services

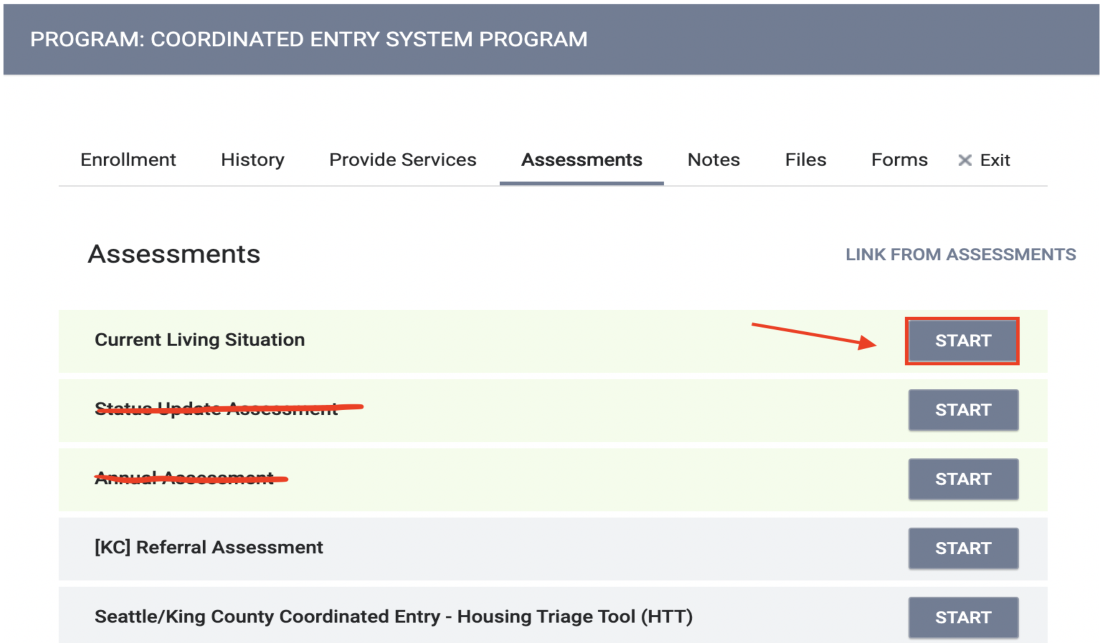
Starting April 1, 2020, Housing Assessors can now enter services for their coordinated entry activities. To enter a service, navigate to the Provide Services tab, open, and select the service you have provided.



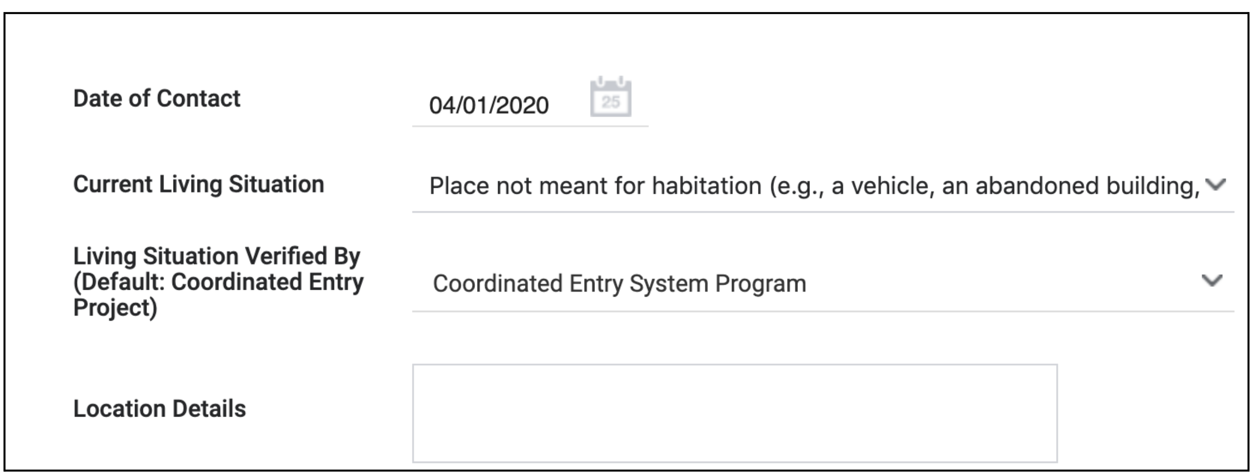
The start date and end date will both be the date you provided the service. Enter case notes as needed. Reminder: ALL Housing Assessors have access to the Coordinated Entry System Agency and will be able to see these case notes. Services only need to be entered for the Head of Household. Enter the Result: either yes or no. The result date can be the same as the start and end date of the service or can be a later date if you are updating the record with the final result.



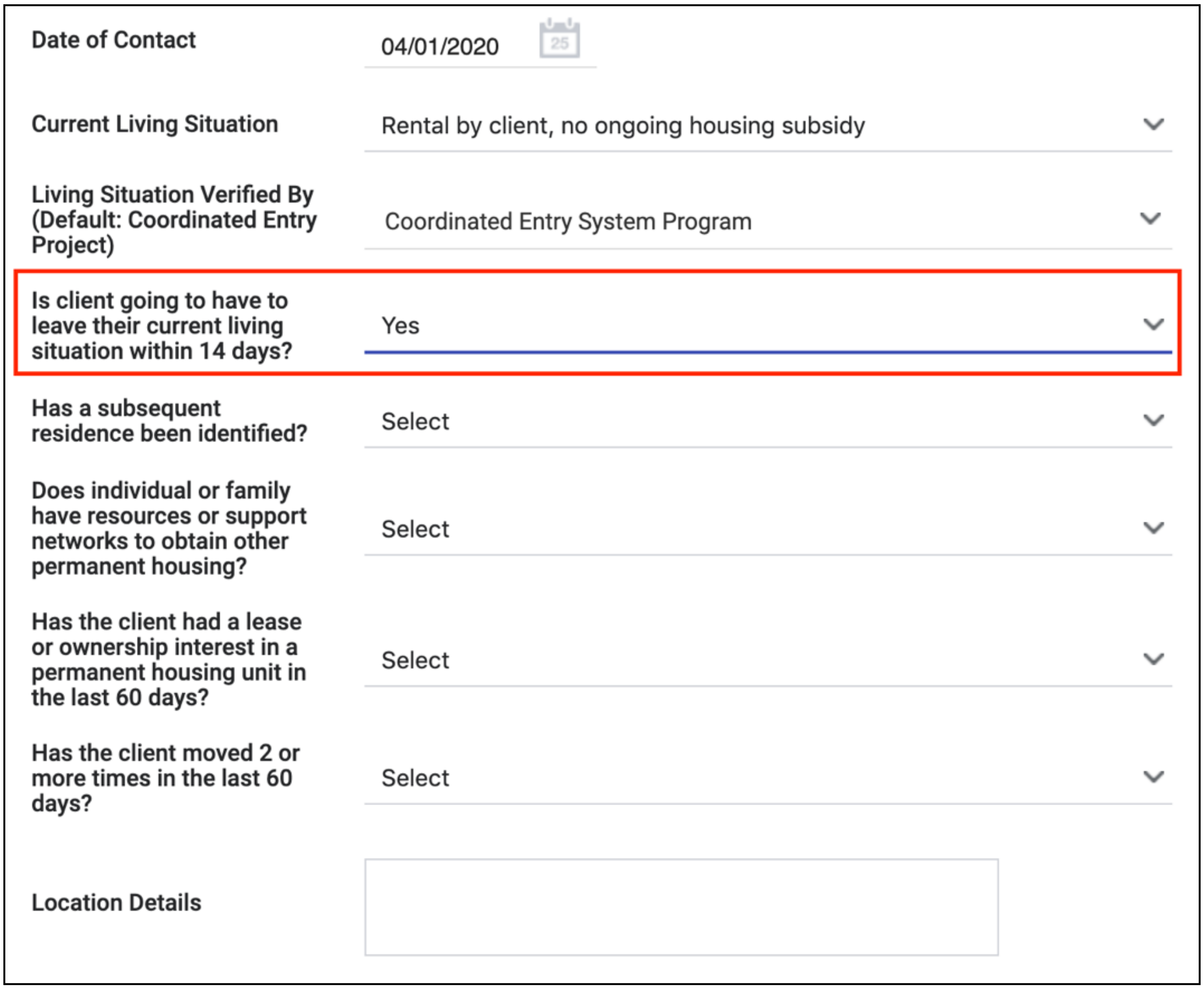
Step 7. Create a Current Living Situation “Assessment”



Navigate to the program-level Assessments tab. Create a new Current Living Situation (CLS) Assessment. You will create a new CLS assessment at the start of the enrollment (dated the same date as the project start date) and then each time you: provide a coordinated entry service (such as referrals or diversion problem-solving), start a new Housing Triage Tool), or update an existing Housing Triage Tool. If the living situation is considered “homeless” then the CLS screen will only display an additional Location Details text box for additional notes.



If the living situation is considered "housed," and at risk of losing housing within 14 days, there will be additional questions that show up.



Step 8 Create a Housing Triage Tool Assessment

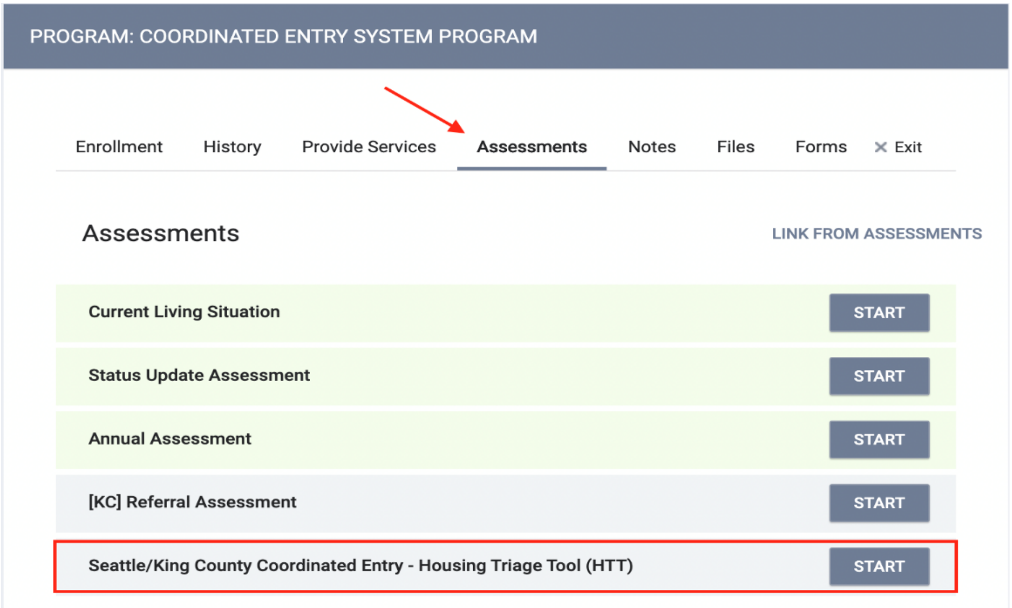
Housing Assessors must complete all Housing Triage Tools in HMIS within 48 hours of when the information was first collected, whether the Triage Tool is first conducted on paper or directly inputted within HMIS. If the household is de-identified, identifying information MUST be sent to CE within the same timeframe. See Data Input Responsibilities section below.

Selecting a Housing Triage Tool

Go to "housing type" pick list in HTT.

Entering the Triage Tool information into HMIS

Click the Assessments tab within the individual's Coordinated Entry System program enrollment. Next, you will select the Seattle/King County HTT assessment.



You will need to complete all fields of the Housing Triage Tool. Once completed, you will need to complete the Assessment Administration section of the HTT including the information of the Housing Assessor who conducted the Triage Tool. Next, click "Save" at the bottom of the screen. You will notice that there is a choice to make the assessment and other information "Private."

Never select "Private" in any part of HMIS. If the profile, assessment, or any other area is made private then the CE staff will not be able to see any information and the household will never be referred to a housing resource.

SEATTLE/KING COUNTY COORDINATED ENTRY - HOUSING TRIAGE TOOL (HTT)

** IMPORTANT ** ASSESSORS MUST READ THE FOLLOWING SCRIPT VERBATIM TO THE CLIENT:

COMPLETING THIS HOUSING TRIAGE TOOL ALLOWS COORDINATED ENTRY (CE) TO MAKE REFERRALS ON YOUR BEHALF TO PARTNER AGENCIES FOR HOUSING AND SERVICES.

PARTNER AGENCIES RECEIVING A HOUSING OR SERVICE REFERRAL FROM CE, WHETHER A HOUSEHOLD CONSENTS TO HAVING THEIR INFORMATION IN HMIS OR NOT, WILL BE PROVIDED YOUR NAME AND CONTACT INFORMATION.

THE ONLY INFORMATION SHARED WITH PARTNER AGENCIES WILL BE FOR THE PURPOSE OF COORDINATING A HOUSING OR SERVICE REFERRAL.

*I confirm that I read the above script to this client (enter staff initials & date):	
Housing Triage Tool Type	In person

***** COVID-19 INFORMATION/RESOURCES *****

KING COUNTY COVID-19 CALL CENTER: 206-477-3977 (DAILY 8AM TO 7PM) CLIENTS CAN CALL IF THEY BELIEVE THEY WERE EXPOSED OR EXPERIENCING SYMPTOMS, OR TO FIND TESTING SITES

COVID-19 RESOURCES INCLUDING FINANCIAL RESOURCES: HTTPS://WWW.UWKC.ORG/NEED-HELP/COVID-19-RESOURCES/

SHELTER/STREET OUTREACH/ DAY/HYGIENE CENTERS HAVE SCREENING GUIDANCE FOR COVID-19 AND OTHER INSTRUCTIONS FROM PUBLIC HEALTH

****

Household Type?	Individual Adult (Single Adult 18+ or Young Adult 18-24)
Are you or any household member currently pregnant?	No

Once completed, you will need to complete the Assessment Administration section of the HTT including the information about the Housing Assessor who conducted the triage tool. Next, click “Save” at the bottom of the screen.

HOUSING TRIAGE TOOL ADMINISTRATION

Housing Triage Tool Date	04/01/2020
Assessor First Name	
Assessor Last Name	
Housing Triage Tool Location	
Was this Housing Triage Tool completed by RAP staff?	No
I confirm that this client's consent status (Release of Information) has been documented in HMIS under their privacy shield. -please enter initials here:	

Step 9. Enter Contact and Location Information for Each Household Member

Contact and Location tabs are located at the global level. This information can be stored for identified/**consenting individuals and households only.**

Housing Referrals from CE rely on having a way to contact a household. Since not every household has a phone, and phones can be lost and numbers can change, we must be creative about the ways CE can reach households.

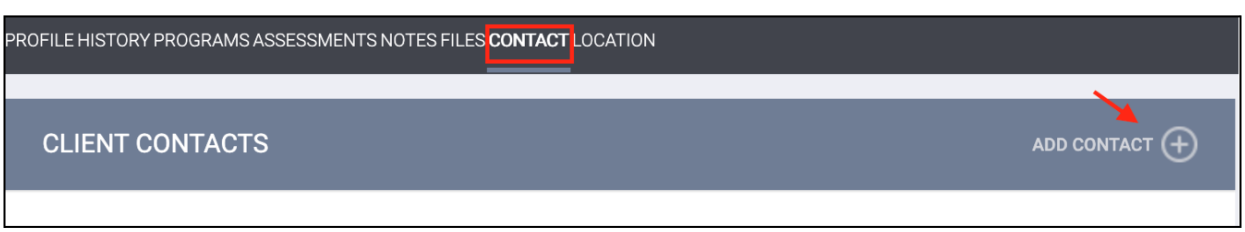
<u>Housing Assessors should include as many forms of contact information as possible.</u>

Examples of contact information that should be collected are:

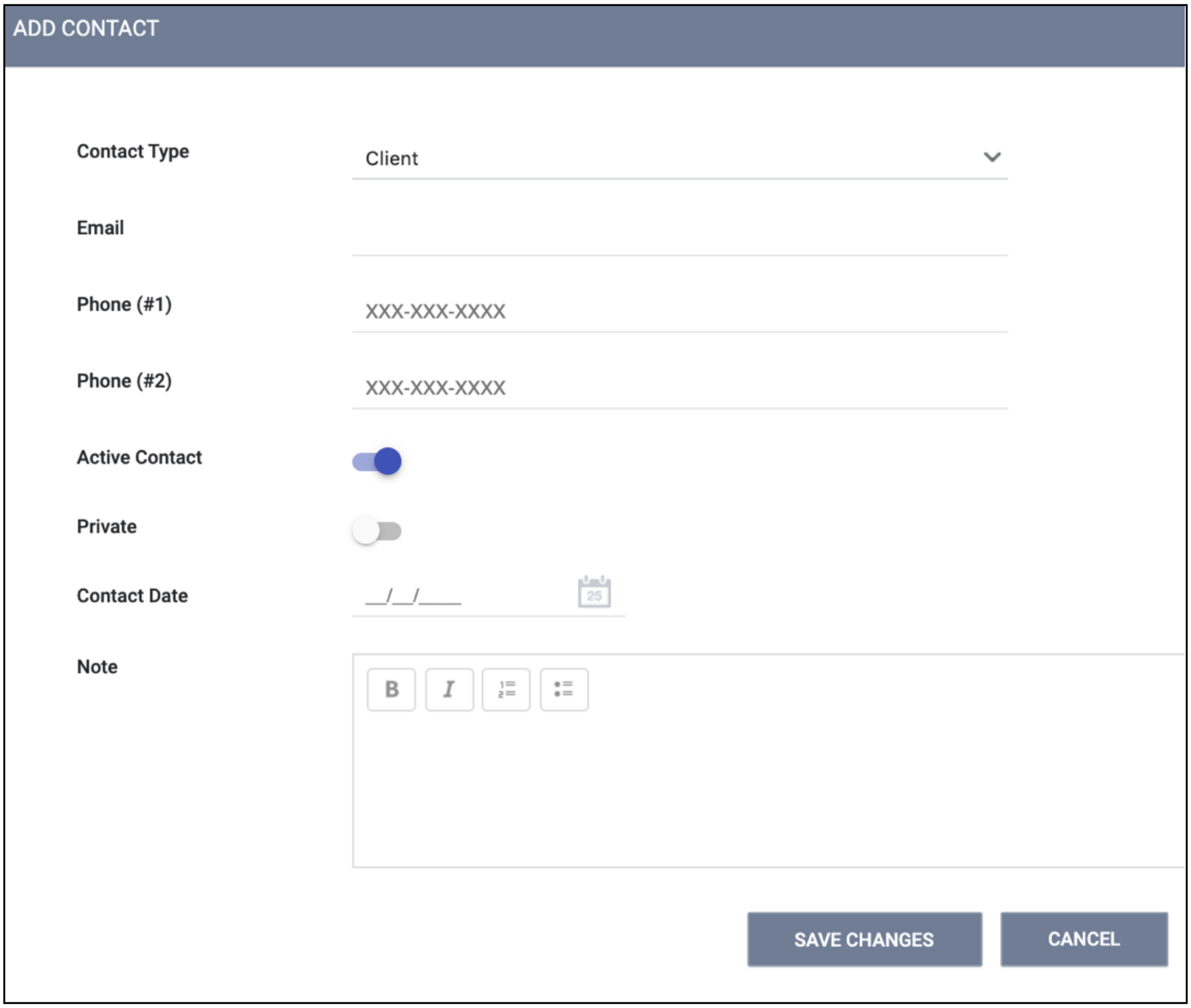
- Friends, family, a case manager, etc. who can get a message to them
- A place they go to where they'd be able to receive a message (meal program, drop-in, shelter, etc.).
- Outreach worker teams are often integral to being able to reach someone who is staying outside;
- Phone
- Text
- Email; and / or
- Facebook URL

How to Add Contact Information:

Click on the "Contact" tab in the individual's file. Click "Add Contact"



Complete contact information and click "Save Changes"

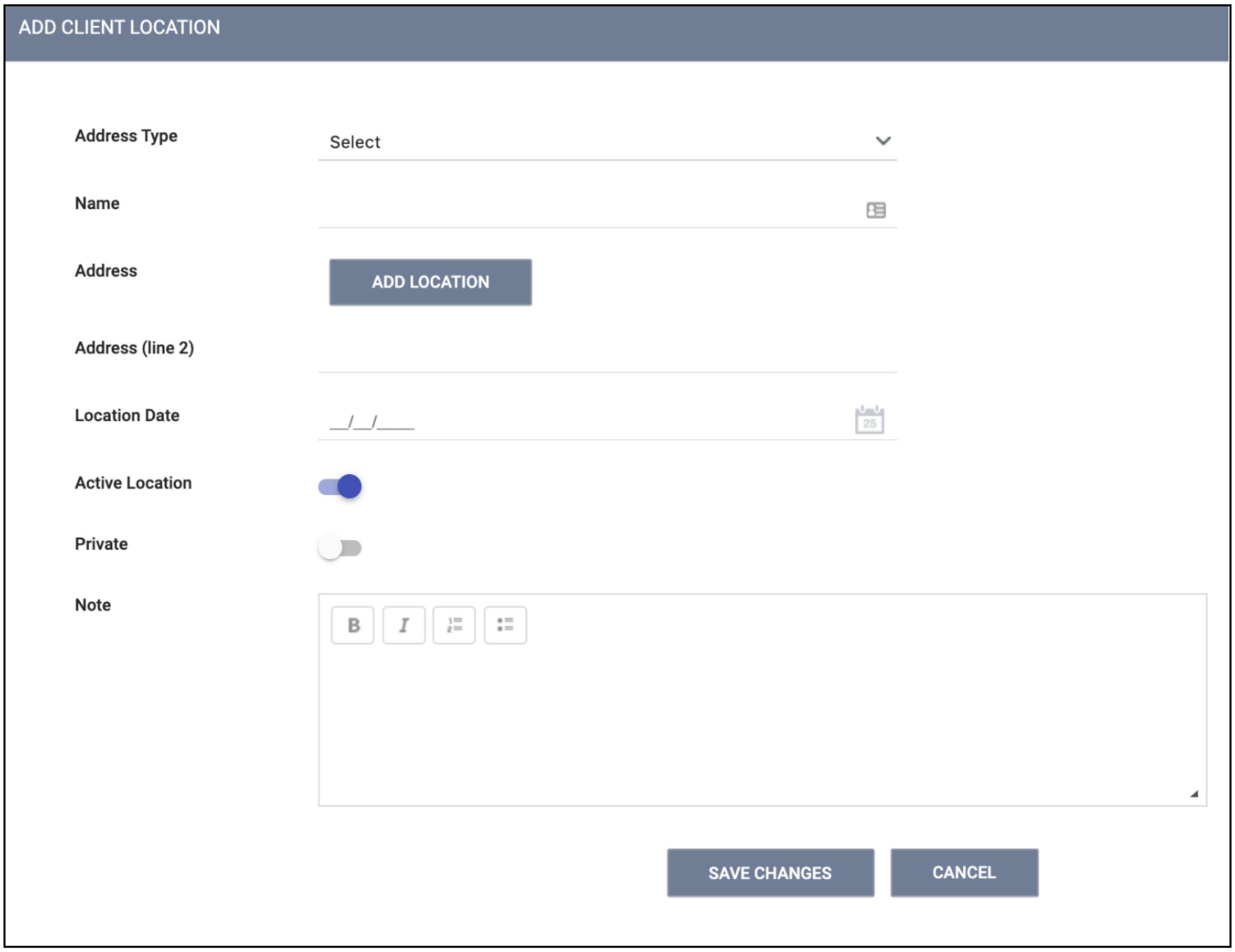


You will be notified at the top of the screen that your changes have been saved.

How to add Location Information:

Click on the “Location” tab in the individual’s file. Click “Add Address”

Complete address information and click “Save Changes.”



Be sure to include the zip code of the area the household is staying. There are certain housing resources that require referrals to come from certain regions of the county. This information will aid the CE team making appropriate referrals.

Next Steps:

Upon completion of the Housing Triage Tool, Housing Assessors should emphasize the importance of having reliable and comprehensive information regarding the best time and place to contact the household etc. Housing Assessors should inform households they can update their information in the following ways:

- With any community-based Housing Assessor
- By calling any of the Regional Access Points[3]

Housing Assessors should also inform households that CE does not operate with a conventional waitlist.

[3] Detailed information about the location, hours of operation, and contact information for RAPs can be found at http://kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinatedentry/access-points.aspx

Closing Script:

The Housing Assessor should help the household feel that the triage process is complete and that all of their questions are answered. Please refer to the Appendices listed below and provide the information to the household.

The CE Process flow is outlined in Appendix IV

The CE Tips and Resource Guide for Consumers is outlines in Appendix V

The CE Messaging-Closing Script for Housing Triage Tool Appendix VI CE Frequently Asked Questions can be found in Appendix VII

Housing Navigation

Households that do not have an existing case manager may want assistance in navigating the process of securing housing from housing referral to "lease up." Community-based Assessors, RAP staff, or other outreach or navigation staff may assist the household with the following responsibilities:

- Assisting household in obtaining necessary documentation required for housing
- Assisting households in navigating any challenges related to the housing process (application and/or inspection process, etc.)
- Participating in case conferences as needed

Documents needed to access homeless housing include:

- ID
- Social Security Card
- Income verification
- Evidence of a disability
- Homeless history (this can expire so the household will want to wait until they have a referral to collect this)

What counts as evidence of disability?

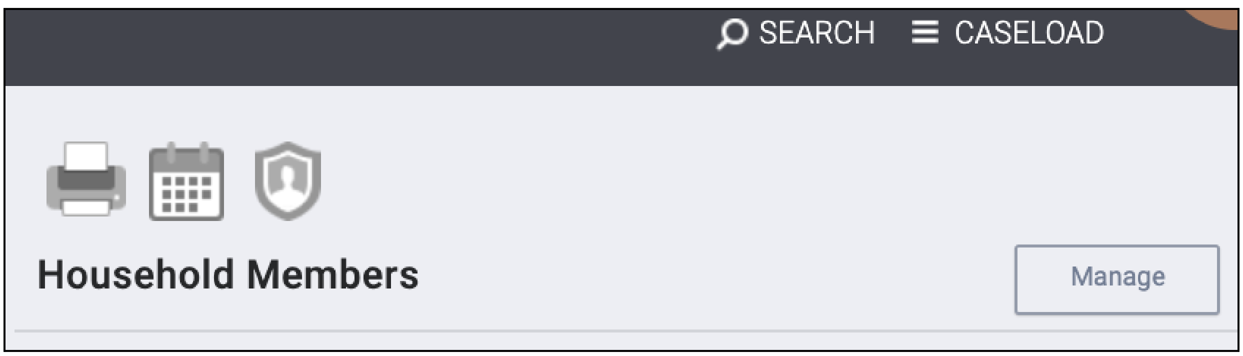
- Written verification from professional (licensed by to diagnose and treat the disability with certification that the disability meets the HUD definition)
- Written verification from the Social Security Administration

- The receipt of a disability check (e.g., SSI/SSDI check or Veteran Disability Compensation)
- Intake staff-recorded observation of disability that, no later than 45 days from the application for assistance, is confirmed and accompanied by evidence described under bullets 1, 2, or 3
- Other documentation approved by HUD

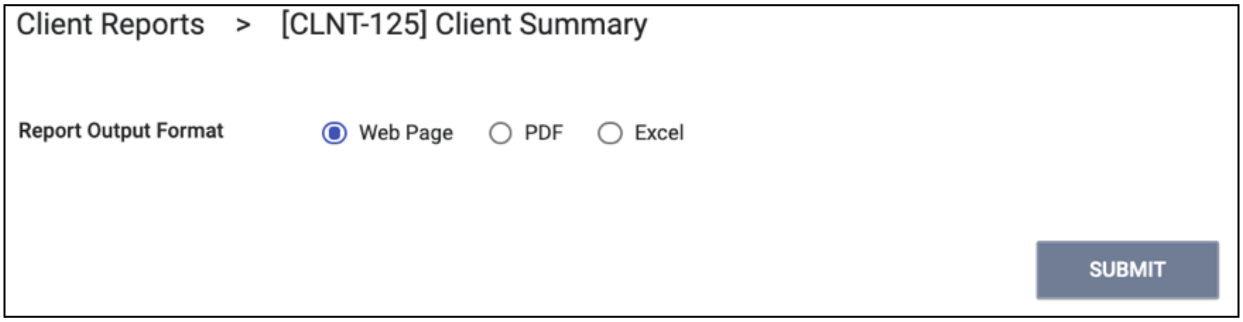
Documenting Homeless History:

- An individual is chronically homeless if homeless for 12 consecutive months+, or 4+ occasions totaling 12 months over 3 years. Each individual occasionally needs to be fully documented, and the breaks can be by self-report.
- A single encounter in a month is sufficient to consider a household homeless for entire month unless evidence of a break.
- HMIS data may be used to document a household's homeless history if there is sufficient data to create a homeless history. A Client Summary report can be used to create the necessary homeless verification. To create a Client Summary Report, follow these steps.

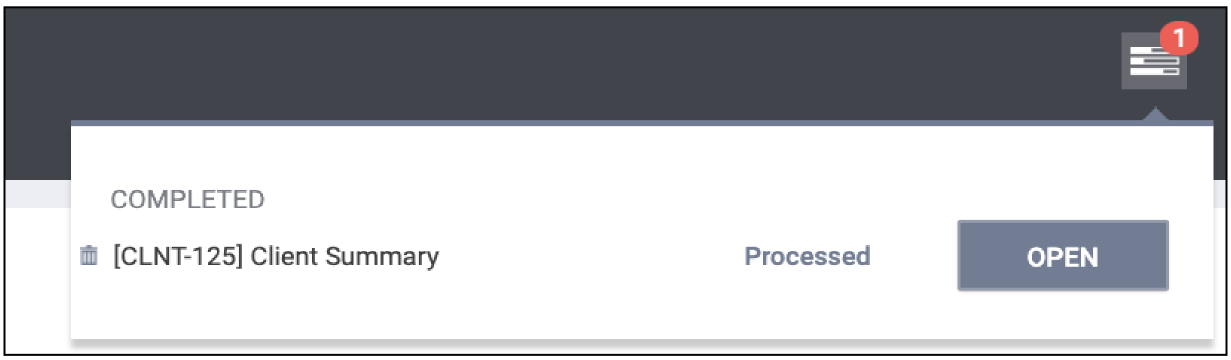
Go into the client's profile page. Click the Printer icon under the Household Member section to pull up Report options.



Click Run Client Summary report



It will default to a web page. Choose this option and then click ok. When the summary is ready this box will appear. Click open.



(Sample of the Client Summary Report in the web page format)

Client Summary

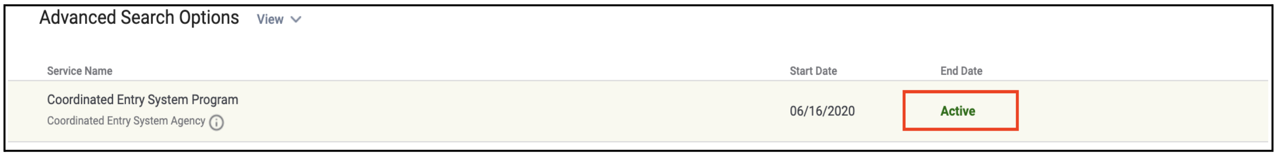
Name:	**Unique Identifier:**
SSN:	**Date of Birth:**
Quality of SSN: Full SSN Reported	**Quality of Date of Birth: Full DOB Reported**

General Information	
Age:	63
Gender:	Male
Veteran Status:	No
VA verified or self-reported:	Not Applicable
VA Eligibility:	Not Applicable
Current Monthly Income:	Not Applicable
Current Chronic Homeless Status:	**Chronic Homeless**
Prior Chronic Homeless Status:	Yes
First time entered into HMIS:	06/03/2013
First type of program enrolled in:	Emergency Shelter
Current Mental Health problem:	No
Ever identified as having a Mental Health problem:	No
Current Developmental Disability:	No
Ever identified as having a Developmental disability:	No
Current Physical Disability:	No
Ever Identified as having a Physical disability:	No
Current Substance Abuse Problem:	Yes
Ever identified as having a Substance Abuse problem:	Yes
Current Chronic Health Condition:	No
Ever identified as having a Chronic Health issue:	No
Current Victim of Domestic Violence:	No
Ever identified as being a victim of Domestic Violence:	No
Currently identified as part of a household:	Yes
Household Members:	Not Set:

Updating an existing CE Housing Triage Tool

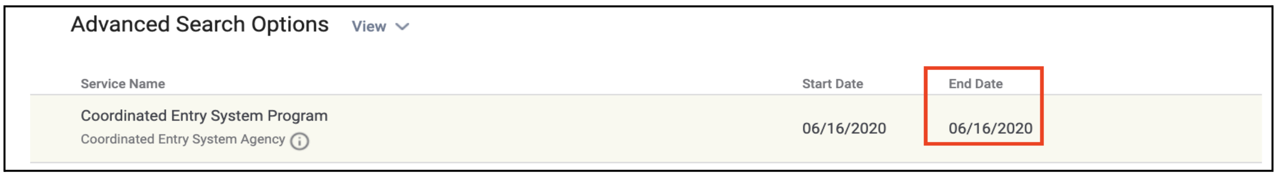
A household may already have an Enrollment (inactive or active) in the Coordinated Entry System Program, and in those scenarios, will need their HTT assessment updated. Below are the scenarios you may encounter, and your data entry responsibilities.

1. **An individual/household is Enrolled into Coordinated Entry System Program and is Active.**



If you see this, then go into the Coordinated Entry Program, update the HTT Assessment, add a Current Living Situation, and enter any services that you provided.

2. **An individual/household is Enrolled into Coordinated Entry System Program and is Inactive.**



Verify that they are still in need of housing. Create a new CE System Program Enrollment. Verify any enrollment data that auto-fills into the fields from a previous HMIS enrollment, complete a new Current Living Situation (CLS), and create a new HTT assessment. *Note: as with the enrollment screen or CLS screen, the data will auto-fill ("cascade") once you start a new assessment. Verify the answer. Enter any services that you provide.*

3. **An individual/household is active in the Coordinated Entry System Program, however, the HTT assessment is incorrect for the corresponding family size or age of applicant.**

Start a new HTT of the correct type inside of the current active CE enrollment. Complete the Current Living Situation and enter any services that you provided.

4. **An individual/household is inactive in the Coordinated Entry System Program, and the HTT assessment is also incorrect for the corresponding family size or age of applicant.**

Verify that they are still in need of housing. Create a new Coordinated Entry System Program Enrollment. Verify enrollment data, complete a new Current Living Situation, and start a new, appropriate HTT assessment. *Note: as with the enrollment screen or CLS screen, the data will auto-fill ("cascade") once you start a new HTT assessment. Verify answers and save. Enter any services that you provide.*

5. **Household situations changing:**

Households growing: When you need to add a member to the household, such as in the case of a child entering the household, or another adult entering, you will first create the new member's client profile and manage the household at the Global level to link them together. Then, add the member to the Coordinated Entry System Program Enrollment. Complete a new Current Living Situation on the HoH, update the HTT. Update any contact and/or location information, as necessary.

Households shrinking: When you have a member that is leaving a household, you will need to exit them from the CE System Program. Once that is completed, you will review the data for the enrollment remaining, updating, or creating a new HTT, as appropriate. Update the contact/location information as appropriate.

HMIS Data Input Responsibilities

Housing Assessors must complete the Housing Triage Tool in HMIS within 48 hours of when the information was first collected, if conducted on paper. If the household is de-identified, identifying information MUST be sent to CE through a secure email to alex.ebrahimi@kcrha.org.

The policies and procedures concerning the protection of all data collected is outlined in the King County HMIS Standard Operating Procedures and HMIS End User Manual. These documents are found on the HMIS https://kingcounty.bitfocus.com/kc-agency-agreements-and-policies

---

Glossary of Terms

CE (Coordinated Entry) – The process where any eligible household can complete an assessment to be considered for homelessness assistance through King County.

CE Trainer - The CE Assessor Trainer role is fundamentally for the communication between CE and the partner agency. Ensures on-site training is completed as designated in the CE assessor manual, and monitors and responds to CE assessor related data quality issues. The CE Trainer can also hold other roles, such HMIS Agency Lead. Agencies can have more than one CE Trainer but must have at least one.

CE Participating Program – Any program that is required by its funding source to participate in coordinated entry or has opted into the system to receive its referrals through coordinated entry.

Community Outreach Teams – Mobile housing assessors who are based at Regional Access Points and can travel around their region to complete the housing assessment with households who are unable to visit a physical Regional Access Point location.

Coordinated Entry System Agency – This is the agency in HMIS where Housing Assessors conduct all data entry related to enrollment, assessment and services.

Coordinated Entry Priority Pool Program – This is the program in HMIS under the King County Agency where housing referrals are conducted. Active enrollment in this program designates the individual/household is being prioritized for housing.

Coordinating Entity – Refers to King County; the entity that manages the CE system.

Current Living Situation Assessment – New program level assessment in Coordinated Entry program. HUD guidelines dictate this has to be completed each time a new HTT assessment is created or updated, or a coordinated entry service is entered.

Diversion- Diversion (also referred to as diversion) is a service that diverts individuals and households from the homeless housing system and CE. Diversion can provide certain types of services that can assist in resolving a homeless housing crisis much sooner than waiting for a CE resource. Diversion solutions may be temporary or permanent but must come to fruition within 30-days and last a minimum of 90-days. For detailed information on Diversion go to the KCRHA website at https://kcrha.org/resources/about-coordinated-entry/and look under Forms and Documents.

Eligible Household - CE serves young adults, families, Veterans, and single adults who are literally homeless in King County according to the category 1 HUD definition of homelessness or fleeing/attempting to flee domestic violence, and single young adults (ages 18-24) who are imminently at risk of homelessness within the next 14 days. See “Eligibility” section for details.

Family – An individual or couple who is pregnant or parenting

HMIS (Homeless Management Information System) – a web-based software application designed to record and store person-level information regarding the service needs and history of households experiencing homelessness throughout a Continuum of Care (CoC) jurisdiction, as mandated by HUD.

Housing Assessors – Staff based at Regional Access Points and other identified individuals who administer the Housing Triage Tool with individuals and families who are eligible for Coordinated Entry.

Housing Navigators – Staff based at Regional Access Points who work with eligible households to prepare for a housing referral once they have completed an assessment. An outreach worker or case manager may alternatively fill the Housing Navigator role.

Mobile Assessment – Housing Triage Tools completed by an Outreach Team with households who are unable to visit a physical Regional Access Point location.

Priority Pool – the pool of eligible households for resources in CE.

Rapid Re-Housing (RRH) – A type of housing assistance that provides housing identification, move-in and rental assistance, and/or case management.

Regional Access Point (RAP) – Regional Access Points provide Diversion / Diversion, connections, and referrals to an array of services and resources, and in cases of higher vulnerability, will complete a triage tool and enter the household into the Coordinated Entry System agency. RAPs are in five sites across King County. Housing assessors and limited navigators are based at these sites.

YA (Young Adult) – An individual who is 18 to 24 years old. There are programs targeted to serve individuals in this age range. Young adults may also be eligible for single adult programs.

Appendices

Appendix I Messaging- Opening Script for Housing Triage Tool

Example of Introductory script.

"My name is [] and I work for []. I have a Housing Triage Tool I would like to complete with you that should take about 5 minutes to complete. This Housing Triage Tool is used to determine potential eligibility for homeless housing resources through Coordinated Entry. This Housing Triage Tool is not used to screen you out of a housing resource.

The information collected goes into a secure database, the Homeless Management Information System (HMIS)

If you have a case manager who is helping you apply for housing, you should still work with them as you might be able to access a resource much faster than waiting for one to become available through CE. I want to make sure you know that there are limited housing resources that are connected to the Housing Triage Tool, so you will not receive a housing referral today. (As appropriate/available, offer diversion services)

Appendix II Messaging- Opening Script for Triage Starting with Diversion Conversation

"Hello, my name is [] and I work for [ ]. I'm here to help you with finding a solution to your current housing situation as quickly as possible. I'm going to start by asking some questions to help me understand what your situation is right now. Is that ok with you?"

Sample Questions:

- Can you tell me where you slept last night (shelter, place not meant for human habitation)?
- Where was the last place you stayed where you felt safe and could attend to your daily needs that was not a shelter or a homeless housing program?
- Do you think that might be an option for you again if we work on it together?
- Is there a family member, or a friend you might be able to stay with if you and I spoke with them together and came up with a plan?
- Are you currently working, or have other income? If so, maybe we can work out a plan for housing that can work with your current income. Is that something you'd be interested in working on together?
- Do you think that employment would help solve your housing situation? Would you like me to refer you to an employment navigator?

If there is a potential plan that can be completed within 30-days that will also last a minimum of 90-days, start mapping it out with the household. Financial resources are very limited. Always attempt diverting without utilizing financial assistance. If some financial assistance is the only option, use a progressive engagement approach and use the least amount of money that will solve the current housing crisis.

If no plan outside of the homeless housing system can be determined and they present as highly vulnerable, explain that you can complete an assessment, BUT EXPLAIN THAT HOUSING RESOURCES THROUGH CE ARE VERY LIMITED AND THAT A HOUSING SOLUTION THROUGH CE IS NOT GUARANTEED OR QUICK.

Appendix III HMIS Client Information Sheet

Bitfocus, Inc.
5940 S Rainbow Blvd Ste 400, #60866
Las Vegas, Nevada 89118-2507

Homeless Management Information System
Client Information Sheet

What is the HMIS System?
HMIS stands for Homeless Management Information System, and is a requirement for all programs and agencies providing services to low-income and homeless households with the support of federal funds. The HMIS is a data system that stores information about homelessness services

What is the purpose of the HMIS System?
The purpose of the HMIS is to improve services that support people who are homeless to get housing, and to have better access to those services.

Why is this type of information being collected?
Client data will be used by local, state, and federal officials to better address the needs of the homeless. Gathering certain basic information (race, date of birth, family size, etc.) about you and the members of your household is a requirement of the federal and local funding which supports this program.

How can the HMIS System benefit me, the client?
By gathering this information on you only once –you can be served by other agencies without reporting all the details (date of birth, social security number, last address, etc.) again and again. If there is a reason that providing your name or the name of other members of your household would place you (or your household member) at risk, then you can request that your information NOT be shared with other agencies. You have the right to revoke the sharing of your information at any time simply by completing a "Client Revocation of Consent to Release Information" form. This form is available at any HMIS-participating agency or on the King County HMIS Website: kingcounty.hmis.cc.

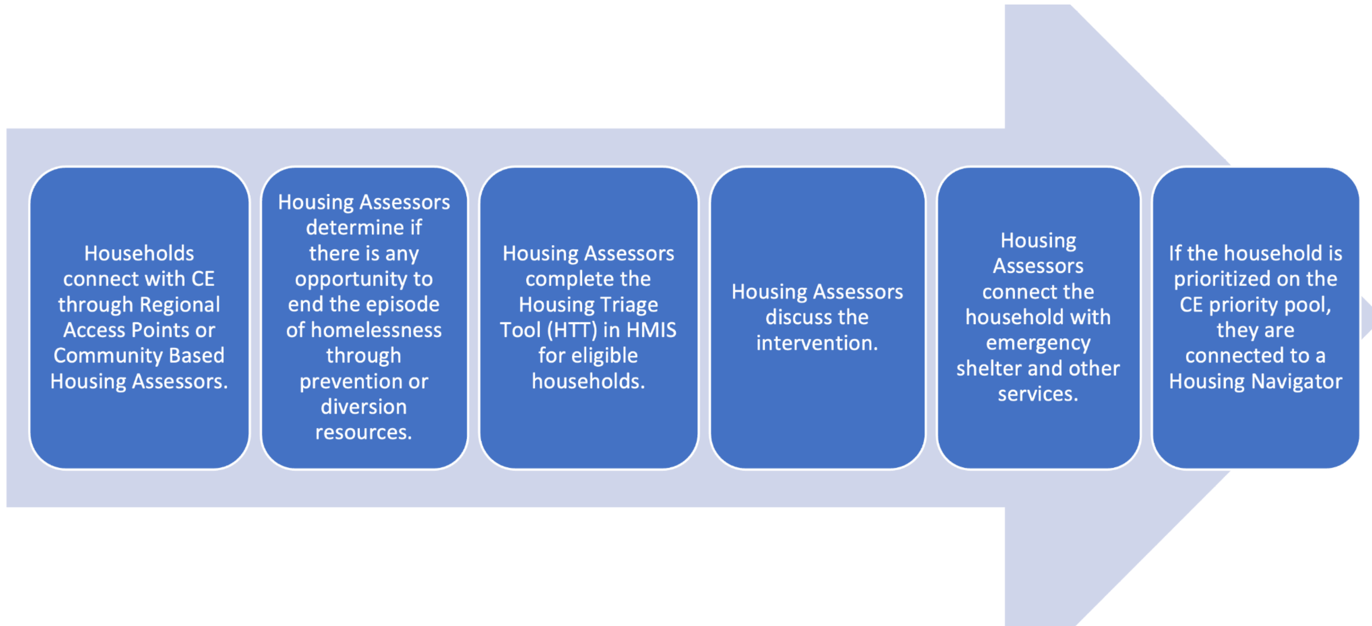
Also, by using the information you provide for the HMIS, you and your caseworker can work together to identify the housing and services you need and work to obtain them.

Who has access to your information?
Your HMIS information may be shared by the Partner Agencies to coordinate referral and placement for housing and services such as counseling, food, utility assistance, and other services. Report developers and HMIS staff may also see your data. There are strict legal guidelines for who has access to your information, and it is protected by electronic encryption.

What are your rights as a client?
You may be required to answer some questions as a prerequisite for a program, but there will be other questions you can choose not to answer. You have a right to view your record and to correct inaccurate information. You also have a right to a copy of your record. We will also NEVER give any information (health, medical needs, mental health, domestic violence, etc.) about you to anyone outside this organization, UNLESS YOU GIVE WRITTEN CONSENT, or as required by law through a subpoena or a court order. Personally identifying information, such as names and birthdays, will be removed seven years after your last recorded HMIS activity. You will receive services whether or not you allow your personally identifying information to be entered into HMIS.

This form may not be amended except on approval of the HMIS Steering Committee
Please send all requests for changes to: kcsupport@bitfocus.com

Appendix IV CE Process Flow



Step 1: Connecting to Coordinated Entry - To ensure accessibility for eligible households, CE provides services from Regional Access Points located throughout King County. Eligible households can initiate an appointment in person through any of the designated Regional Access Points. Households can also complete a triage tool through community-based Housing Assessors.

Step 2: Diversion First - *Housing Assessors* at RAPs will begin a discussion offering Diversion (Diversion) first along with an array of other services and mainstream resources to assist in resolving the immediate needs of a household and potentially end an episode of homelessness. Resources along with diversion may include; employment, education, transportation, public benefits, and legal services, among other resources.

Step 3: Housing Assessment - *Housing Assessors* are available to administer the Housing Triage Tool with eligible households. The tool is completed and tracked using HMIS.

Step 4: Offer Crisis Intervention Services – At the time of assessment, *Housing Assessors* will connect households with emergency shelter or other crisis response services as appropriate and as available.

Step 5: Housing Referral – Only households who are referred to the CE Priority Pool will receive housing referrals. Households are prioritized based on the prioritization policy adopted by the Seattle/King County CoC and referred to resources through the case conferencing process.

Low Barrier Policy

CE participating programs will make enrollment decisions based on standardized eligibility criteria determined by program funding. No client may be turned away from crisis response services or homeless designated housing due to lack of income, lack of employment, disability status, or substance use. Exceptions include instances when the project's primary funder requires the exclusion, or a previously existing and documented neighborhood covenant/good neighbor agreement has explicitly limited enrollment to clients with a specific set of attributes or characteristics. Funders restricting access to projects based on specific client attributes or characteristics will need to provide documentation to the Coordinating Entity providing a justification for their eligibility policy.

Appendix V CE Tips and Resource Guide for Consumers

Coordinated Entry (CE) – Tips & Resources Guide
| https://kcrha.org/regional-access-points/

Frequently Asked Questions about Coordinated Entry (CE)
I have completed a CE Housing Triage Tool— is there a waitlist for housing? How long does it take for me to get housing?
There is no waitlist for housing through Coordinated Entry. Because our community does not have sufficient housing resources to meet the need, Coordinated Entry is only able to prioritize a portion of households for referral to housing resources. We are not able to predict if or when a household will be prioritized, and prioritization or referral is not a guarantee.

What happens after I complete the triage tool?
You now have an active housing triage tool for CE. If you are prioritized for resources through Coordinated Entry, navigation staff will reach out to you using all the contact information you gave us today. If you are contacted, please respond as quickly as you can. If your contact information changes, please reach out to the staff member or agency who completed your Housing Triage Tool. You can also call any Regional Access Point (RAP) site to update your information.

RAP Information:
Location: ____
Phone number: ____________________________________

I have completed the housing triage tool, but my situation has changed. What should I do? If your contact information or housing situation changes, please reach out to the staff member or agency who completed your Housing Triage Tool. You can also call any Regional Access Point (RAP) site to update your information.

Please call to update if any of the following changes:

- ✔ Where your household is staying
- ✔ If there are changes in family members
- ✔ If the number of people in your household changes
- ✔ Contact information (email, telephone number, secondary telephone number, etc.)

✔	Change to income (employment, SSI, TANF, child support, etc.)

Next Steps
If you are contacted by a housing navigator, you may be asked for these items in preparation for a connection to a housing resource.

Resources

- **Resources that help pay for photo ID:**
  - *Department of Social and Health Services (DSHS)*: Current clients may walk into any DSHS office to start the process. For details, call (206) 501-2233 or (877) 501-2233 🎬 *Solanus Casey Center*: (206) 223-0907
- **Payment Planning & Credit Reports:**
  - Free credit reports at www.annualcreditreport.com 🎬 Start a payment plan with a Housing Authority: ○ *King County Housing Authority*: www.kcha.org ○ *Seattle Housing Authority*: www.seattlehousing.org **Criminal Background & Warrant Status:**
  - *Washington State Courts*: www.courts.wa.gov 🎬 Quash active warrants: ○ Go to any *King County District Court* location or call at (206) 205-9200.
  - ○ Free legal advice: www.washingtonlawhelp.org
- **Social Security card:**
  - www.ssa.gov/forms
- **Birth Certificates:**
  - www.usa.gov/replace-vital-documents

Appendix VI Messaging –Closing Script for Housing Triage Tool

Example of closing script:

Thank you [client name] for completing the CE Housing Triage Tool with me today. If your household is added to the priority pool a CE Referral and Operations Specialist, or Housing Navigator will contact you. Please do your best to keep your contact information up to date in HMIS.

Because our community does not have sufficient housing resources to meet the need, Coordinated Entry is only able to prioritize a portion of households for referral to housing resources. We are not able to predict if or when a household will be prioritized, and prioritization or referral is not a guarantee. I'll mention again that if you can think of a plan outside of CE that can get you housed, please contact me and we can discuss it.

In the meantime, I'm providing you with information on the next steps and how to keep your information up to date that you can take with you. I'm also giving you a list of other resources that might be helpful [explain the resources provided, or if providing a warm hand-off, explain the process].

I wish you the best in your housing search, again if your situation changes, please refer to the CE Tips and Resource Guide for Consumers that I just gave you.

Appendix VII CE Frequently Asked Question

Client Level FAQ

1. **What is Coordinated Entry (CE)?**
   The purpose of Coordinated Entry (CE) is to ensure that all households experiencing homelessness have equitable access to housing resource connections to resolve their housing crisis.CE does not create more available housing, but prioritizes households to match to available resources..

2. **How does CE work?**
   Information about Coordinated Entry can be found here:
   https://kcrha.org/resources/about-coordinated-entry/

3. **Who does CE serve?**
   Coordinated Entry serves all populations (single adults, young adults*, couples, families, and Veterans) who are experiencing homelessness* and are residing in King County. Additionally, young adults, including young adults who are pregnant or parenting* who are at risk of homelessness within 14 days can also receive CE services.

*Experiencing homelessness means:

- Living and sleeping outside or in places not meant for human habitation,
- Fleeing or attempting to flee domestic violence**,
- Staying in an emergency shelter or,
- Exiting an institution*** where you stayed for up to 90 days and were homeless before entering that institution.

* **Young adult means** a person between 18 years old through 24 years old.

****Domestic violence** means the person or family is afraid to return to their home or is experiencing dangerous or life-threatening conditions at home, usually due to abuse, stalking, dating violence, sexual assault, or other physical assault. Persons who have experienced human trafficking or sexual exploitation may also be served by CE.

******Institution** means a jail, prison, a psychiatric hospital, medical hospital, or a drug/alcohol treatment program.

4. **How can I get connected to CE?**
   You can get connected by calling our Regional Access Point offices.
   https://kcrha.org/regional-access-points/

5. **I do not meet any of the conditions described in Question 3, where can I go for help?**
   CE can only serve people or families who meet at least one of the conditions described in Question 3. If you or your family do not meet any of the conditions listed, please call 211, or visit

http://crisisclinic.org/ to get connected with other services. For Prevention Resources see:https://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/homeless-prevention.aspx

6. **I do not speak English very well. Will I be able to be triaged?**

   Yes. Workers at the Regional Access Point offices can speak several different languages. When you call the RAPS, please let the person answering your phone call know what language you are most comfortable speaking. If no workers at the location where you are meeting speak the same language as yours, the person answering your phone call will make sure an interpreter will be available during your appointment.

7. **I have young children. Can I bring them to my housing meeting?**
   Yes. You are welcome to bring your children with you to your appointment.

8. **I have work or school during the daytime hours. Will I be able to complete a triage tool?**
   Yes. Regional Access Point offices can offer evening and weekend hours by appointment. When you call the RAPS, please let the person answering your phone call know about your work or school schedule.

9. **What if I am currently in a jail or a prison, can CE help me?**
   If you were homeless before being in a jail or prison AND stayed in jail or prison for 90 days or less, then CE can help. Contact your Jail Release Planner for help with assessments before leaving jail. If you are a young adult (17.5 through 23.5 years old), CE can help if it is at least two weeks before you leave a jail or prison. For a young adult, there is no requirement that you were homeless immediately before entering the jail or prison. There is also no requirement that you were in jail or prison 90 days or less.

10. **I have completed a CE Housing Triage Tool. Is there a waitlist for housing? How long does it take for me to get housing?**
    There is no waitlist for housing through Coordinated Entry. Because our community does not have sufficient housing resources to meet the need, Coordinated Entry is only able to prioritize a portion of households for referral to housing resources. We are not able to predict if or when a household will be prioritized, and prioritization or referral is not a guarantee.

11. **I have completed the CE Housing Triage Tool, but my situation has changed. What should I do?**
    If you want to update your contact information or any other information related to your housing assessment, you may call a Regional Access Point, or connect with your community Housing Assessor. Note: Due to the volume of calls it will take CE staff approximately 5-10 business days to follow-up on any messages left.

Assessor Level FAQ

1. **Do clients who already have a VI-SPDAT need to get assessed using the new assessment?**

No. Households with a Housing Triage Tool (or VI-SPDAT) completed prior to this change do not need to complete a new HTT and will remain potentially eligible for prioritization as long as they remain active in the CE System Agency Program. Households should complete a new Housing Triage Tool if their household type has changed.

12. **Does this change impact how people are prioritized?**

Prioritization remains unchanged. Since October of 2020, Coordinated Entry has been prioritizing households based on COVID-19 guidance issued by HUD and the Washington State Department of Commerce. Coordinated Entry currently prioritizes households for each Priority Pool who are most disproportionately impacted by COVID-19, using factors determined by Public Health of Seattle King County. For more information, please see the COVID Prioritization Presentation on the KCRHA website.

13. **I'm serving a young adult, which household type should I use?**

Please select Individual Adult and ensure the date of birth is correct on the enrollment screen. The client will be potentially eligible for prioritization for young adult resources if within the age range of 18-25. In the case your client has chosen to be de-identified in HMIS, an age range of 17-26 is considered until the actual age of the client is confirmed.

14. **I'm serving a young adult who is pregnant, which household type should I choose?**

Please complete the Housing Triage Tool indicating Family as the population. If the client's CE System Agency enrollment is still active, please go into the enrollment, open the HTT, update the Household Type picklist to Family, please then add your name and date under the Update section of the HTT. Please remember to complete a NEW Current Living Situation assessment. Save. If the client's enrollment is not active, then create a new enrollment, enter any services that were provided, create a new HTT (note, information will cascade) and a new Current Living situation. Update Contact/Location information as needed. Save.

15. **I am serving a youth under 17, can I complete a Housing Triage Tool with them?**

Youth under 18 are not eligible for Coordinated Entry and should be connected to community resources/other supports.

16. **I am serving a single adult who has regained custody of their minor child. Which household type do I choose?**

    Please complete the Housing Triage Tool indicating Family as the population. If the client's CE System Agency enrollment is still active, please go into the enrollment, open the HTT, update the Household Type picklist to Family, please then add your name and date under the Update section of the HTT. Please remember to complete a NEW Current Living Situation assessment. Save. If the client's enrollment is not active, then create a new enrollment, enter any services that were provided, create a new HTT (note, information will cascade) and a new Current Living situation. Update Contact/Location information as needed. Save.

17. **I'm serving a household with multiple adults and no minors. What should I do?**

    Each adult will need their own CE System Agency program Enrollment, and their own HTT completed. Please make sure to manage the household together via the Manage tab on the Profile screen.

18. **I'm serving a household who is at risk of homelessness. What should I do?**

    The household should be offered prevention resources. Households who are at risk of homelessness are not eligible for CE resources at this time and do not need an entry into the CE System Agency. If their program enrollment was already created, simply provide the CE Referral service, "CE Referral to Homelessness Prevention & Housing Stability Services", enter in a "Current Living Situation" assessment, and exit the household from the program. Do not complete an HTT.

    Exceptions: if a household is fleeing/attempting to flee domestic violence, or if they are a young adult (18-24) who is at risk of losing housing within 14 days.

19. **If there are no longer any detailed questions on the HTT, why are we still completing them?**

    Assessments need to be completed to meet HUD requirements for a coordinated entry system. The HTT questions also indicate household type and provide information to determine prioritization.

20. **How can I flag an assessment?**

Assessment Flags were used when answers to VI-SPDAT questions differed from what was observed by Housing Assessors. Since our community no longer prioritizes based on VI-SPDAT score, the ability to flag Housing Triage Tools has been removed.

21. I'm a CE Trainer - Do I still need to complete the onsite training?

The training procedure remains unchanged for this transition at this point. Please continue to complete the online training, in person training, and attend at least one refresher in your first six months.

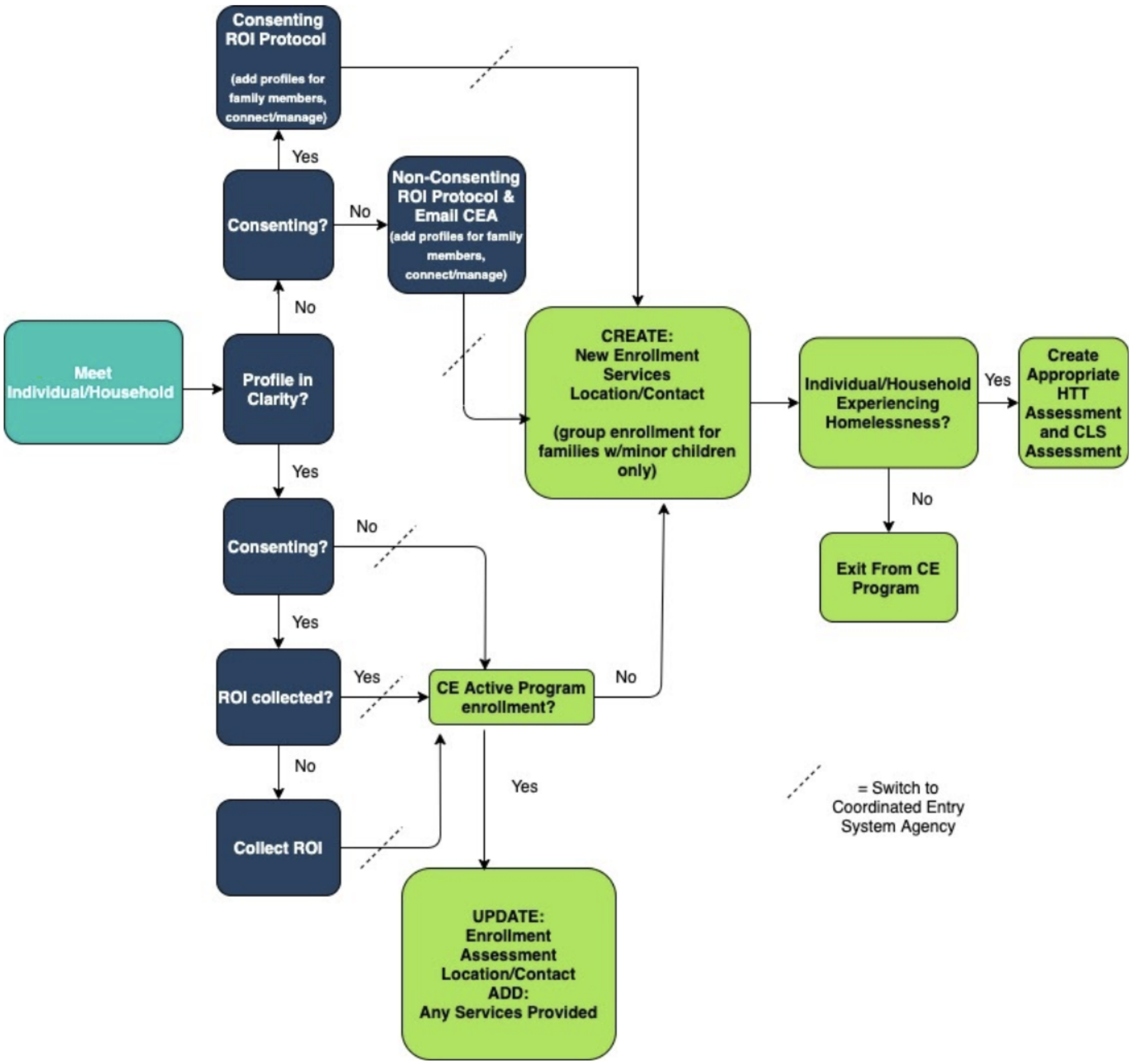
Need Help?

- For questions or support about how to enter data or use Clarity, please contact King County HMIS Help Desk at kcsupport@bitfocus.com , or (206) 444-4001, EXT 2

- For questions about the CE assessor access you can reach out to Alex Ebrahimi, Program Performance Manager, with KCRHA at alex.ebrahimi@kcrha.org

- Locate Client Forms and other resources on the King County HMIS website and the KCRHA CE site

Appendix VIII Housing CE HMIS Assessor Workflow



Appendix VIIII CE Housing Assessor Training Materials

HOUSING ASSESSOR TRAINING PLAN

Training Checklist and Verification for New Assessors

Organization Name: ___________________________

Trainer Name: _______________________________

Trainee Name: _______________________________

New Assessor training plan:

The following is a step-by-step guide for agencies to use when training new Assessors. Each step must be completed in order to have access to HMIS and complete CE Housing Triage Tools. When each step is complete check the appropriate box. When all steps are completed both parties sign and the training plan is placed in the employee file for verification of training completion.

Step 1

☐**Watch the CE Overview webinar -** This is an overview of CE system and processes located at https://training.bitfocus.com/king-county-coordinated-entry-training

Date Completed: ____________

Step 2

☐**Watch the Clarity General Training webinar and Privacy and Security Webinar-** these webinars are required to get a Clarity log in

General Training: https://kingcounty.bitfocus.com/kc-chs-general-training
Privacy and Security Training: https://kingcounty.bitfocus.com/kc-privacy-security-training

Date Completed: ____________

☐Once the assessor has completed the webinar, the HMIS lead from their agency must contact the Bitfocus helpdesk at (206) 444-4001 extension 2 to request a username and password for the new assessor.

Date completed: _____________

Step 3

☐**Assessor Credential training (ACT's)-** all assessors are required to attend the next available refresher training administering the CE Housing Triage Tool. A member of the CE team will host this training.

ACT's are scheduled to occur monthly. All ACT's are two-hours in length via online webinar. Dates for training can be found on the CE website: https://kcrha.org/coordinated-entry/

Date completed: _____________

I certify that all training requirements have been completed:

CE Trainer Name: _________________________ New Assessor Name: ________________________

CE Trainer Signature: ______________________ New Assessor Signature: ____________________

Today's Date: _____________________________

Training Checklist for New CE Housing Assessors

The CE Trainer must cover the following topic areas when training a new CE Assessor. Please check the box as you complete each task. ***Please check the KCRHA website for the most current version of this form and review it before you begin training.***

Preliminary Training

☐ Find and utilize the Housing Assessor Training Plan (Appendix VIIII)

☐ Ensure that new Assessor watches the CE Training Video and takes the Clarity HMIS General Training prior to proceeding with the rest of this Training Plan

☐ Notify your Agency HMIS Lead, to request a Clarity HMIS username and password for the new Assessor after completion of Clarity General Training

Creating households/profiles (HMIS)

☐ How to create a new profile

☐ How to create a household and link household/family members together

☐ How/when to create a group enrollment

De-Identified households

☐ When to create a de-identified profile (Fleeing DV, client refuses to consent for any reason)

☐ How to create a de-identified profile in HMIS (consent refused toggle)

☐ Securely sending identified information to CE - how and what information

HMIS Consent

☐ Where HMIS Consent form available in multiple languages, including braille

☐ How identified/consenting individuals should complete the HMIS Consent form (paper upload, verbal, e-signature)

☐ How de-identified/non-consenting individual's HMIS Consent form should be completed

☐ How to set permission to "No" for a non-consenting individuals

☐ How and when to complete and process the Revocation of Consent form

☐ How and when to contact Helpdesk for a consenting client/household who is now fleeing DV

☐ How to complete and upload the Veteran ROI form

Code of Ethics / Confidentiality

☐ Review of King Co. CE Code of Ethics/Confidentiality

CE Appointment Paperwork and Process

☐ Review all paperwork in CE appointment process, including:

- Opening/Closing/FAQ scripts
- Diversion conversations / Path to Home information
- Client Next Steps

CE Program Enrollment / Housing Triage Tool (HTT)

☐ How to switch between Coordinated Entry Agency and your "Home" Agency ☐ How/when to enroll household vs individual into the Coordinated Entry System Agency Program

☐ How/where and when to enter CE Services (HoH only) (note: RAP will enter under RAP program)

☐ How/when to complete the Current Living Situation Assessment (HoH only)

☐ Understanding of the difference between the 3 household types and when to select which one (TAY, Family, Single Adult)

☐ How to make sure individual/household retains "Active" status

Contact and Location Tabs

☐ How to enter client information in the Contact and Location tabs for identified/consenting

Client Notes vs. Public Alerts

☐ How/when to create a Public Alert vs Client Notes

☐ How/when and when not to enter other notes on: Services, Current Living Situation Assessments, Location or Contact tabs. (ie. identified/de-identified profiles)

Priority Pool / CE Referrals

☐ What is the Coordinated Entry System Priority Pool (CE Project) and how does it work?

☐ What is Case Conferencing?

☐ How to tell if an individual/household has received a CE referral

☐ Review of the types of homeless housing programs available through CE (ie. Permanent Supportive Housing, RRH, Transitional, etc.)

Questions from individuals/households

☐ Review scripts / how to answer questions from households

☐ Where am I on the waitlist?

☐ What type of housing will I be referred to?

☐ When will I receive a referral?

☐ How and how often should I update my information?

Where to go for help

☐ Bitfocus Helpdesk – (206) 444-4001 x2 or kcsupport@bitfocus.com

☐ CE Housing Assessor Manual (found on KCRHA website)

☐ Your Agency CE Trainer

Appendix X Code of Ethics / Confidentiality

Code of Ethics / Confidentiality

Households have the right to expect that information you obtain about them is kept confidential and is used only for the purposes of obtaining housing through CE. This duty of confidentiality applies to all information obtained by a Housing Assessor about a household. Maintaining a household's confidentiality is fundamental to the partnership between CE and the household.

- Housing Assessors will meet with households in an environment that protects privacy and confidentiality
- Use culturally and linguistically competent practices. (Interpreters via phone or in person depending on the need) (COVID phone interpretation is recommended)
- Housing Assessors will inform households of the limitations of confidentiality
- Housing Assessors will only disclose information about a household to assist the individual or family in obtaining housing and services.
- Housing Assessors will be open and transparent about the limitations of the housing resources within the community and not set expectations about access to housing that cannot realistically be met
- Housing Assessors will not take financial compensation from clients to help them
- Housing Assessors will report any potential conflict(s) of interest to their agency supervisor
- Housing Assessors will enter client information in the HMIS database within 72 hours of their visit