



# **Quick Guide: Posting and Responding to Housing Referrals from CEA**

Housing Provider Agencies operating homeless housing beds and/or housing units may be required to post these availabilities within the Coordinated Entry system. Units must be posted once the unit is available to be filled. In addition, once the bed or unit is filled through the CEA prioritization or external fill process, the agency will also need to review the referral and either accept/enroll the client into their program, or deny the referral and send the referral back to the queue. Housing providers are expected to acknowledge the referral within 24 hours and begin contacting the household using all available contact information in HMIS Clarity system. Acknowledging and processing referrals happens within the HMIS. Below are the exact steps to within HMIS.

**Note**: You will need your user role adjusted to access the Referral area in Clarity. If you have questions about your role, contact your HMIS Agency Lead. They will be able to request adjustments for you.

## Adding Resource Openings in HMIS

- Step 1: Login to HMIS
- Step2: Click the Search tab
- Step 3: Select Referral tab (far right)
- Step 4: Select Availability under Referrals

Program Availability       FULL AVAILABILITY       LIMITED AVAILABILITY       NO AVAILABILITY         RULL AVAILABILITY       LIMITED AVAILABILITY       NO AVAILABILITY       NO AVAILABILITY	Pending Community Queue Com	oleted Denied Sent Availability				
FULL AVAILABILITY       LIMITED AVAILABILITY       NO AVAILABILITY	Program Availability	$\bigcirc$				
FULL AVAILABILITY       LIMITED AVAILABILITY       NO AVAILABILITY			FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY	
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FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY			FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY	
	-		FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY	





- Step 5: Select your program under Program Availability
  - o Make sure it is toggled to "Limited Availability"
  - o You will see you open resources and below them you will see the referrals that are pending under 'Reserved Openings'. Under 'Reserved Openings' you will see the option to add a 'single opening' or 'multiple openings'.

10/04/2019 #503			Zii
Unit Description (IMPORTANT : please enter unit number in "Additional Notes" above)			
Date Unit/Resource is Available :			
Max Household Size :			
Min HoH Age :			
Unit Size (SRO, 1bd, 2bd, etc.) :			
Floor of Unit :			
Stairs or Elevator (II applicable) .			
Special Population: Single Adult :			
Special Population: Veteran			
13 more	fields		
SERVED OPENINGS			
Opening	Client	Referred Date	
11/19/2018 613		09/20/2019	

- If you have multiple openings you can batch open them through selecting 'add multiple openings'. If you do make sure that you go back and select the edit button and add any criteria unique to that opening such as a unique unit number/identifier, etc.
- Step 6 (for this example I will be opening a single resource): Select 'add single opening'
  - o Please at minimum fill in:
    - the date this is being completed
    - the date you anticipate the unit to become available (if applicable)
    - Additional notes the unit number
    - Unit Description
    - Min Age
  - Please note you can fill in all applicable spaces





• Step 7: Once all needed info is filled in please use the Special Population toggles if it is <u>an</u> <u>eligibility requirement</u> for the resource, ex: below is an example for a single adult resource

	Stairs or Elevator (if applicable)	
	Does this unit have accessibility features? If so, please describe:	
	Special Population: Family	
	special Population: Single Adult	
	Special Population: Veteran	
	Special Population: YA	
	Does this project have eligibility criteria regarding gender of HoH?	
	If yes, please describe:	
	Eligibility Criteria: Co- Occurring Disorder	
	Eligibility Criteria: Mental Health	
$\checkmark$	Eligibility Criteria: CD/SUD	
	Eligibility Criteria: Medicaid	
	Eligibility Criteria: LTSS	
	Eligibility Criteria: HIV	

• Step 8: Save changes. This button is located at the bottom of the form.

	SAVE CHANGES	CANCEL		
k.			12 mil	



# **Deleting Housing Units**

- Step 1: Login to HMIS
- Step 2: Click the Search tab
- Step 3: Select Referral tab
- Step 4: Select Availability under Referrals

REFERRALS	
Pending Community Queue Completed Denied Sent Availability	
Program Availability	
	FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY
	FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY
	FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY
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- Step 5: Select your program under program availability
- Step 6: Select the trash can on the top Right of the unit opening





Special Population: Family Special Population: Single Adult Special Population: Veteran	: No : Yes : No 13 more fields	
10/04/2019 #503		
Unit Description (IMPORTANT please enter unit number in "Additional Notes" above)		$\cup$
Date Unit/Resource is Available		
Max Household Size		
Min HoH Age		
Unit Size (SRO, 1bd, 2bd, etc.)		
Floor of Unit		
Stairs or Elevator (if applicable)		
Special Population: Family		
Special Population: Single Adult		
Special Population: Veteran		

A message will appear after you select the trash can

W	a claritybs	om savs				
Th	is will delete	the opening	g! You can'	t restore it	in future.	
			-	6		N
					ОК	Cancel

• Step 7: Select OK

Do not worry if you accidentally delete an opening you can always add a new one <u>Do not delete openings when they are approved for External Fill</u>. Please see the External Fill section.





## Processing CEA Prioritization Referrals

As the agency that is receiving the referrals it is expected for you to acknowledge and begin processing referrals within 24 hours. While a household has a pending referral they are not eligible for other housing resources. If there are any issues with contacting the household please reach out the CEA Referral & Operations Specialist who sent the warm hand off email for assistance.

- Step 1: Login to clarity
- Step 2: Click the Search tab
- Step 3: Click Referrals tab and the screen above

ж. С	1 M.			
REFERRALS				Last 30
Pending Completed Denied Sent Availability Pending Referrals				19 30 4
Search	Mode	Standard	~	
Eligible Clients Only	Sort By	Default	SEARCH	<ul><li>Pending</li><li>Completed</li><li>Denied</li><li>Pending - In Process</li></ul>

• Step 4: Hover over the edit box to the left of the name of the client and right click the box





Chent Rele	errai Date	Qualmed	Days Pending
			A7F .

# The next page will be brought up.

REFERRALS			
Pending Community Qu	eue Completed	Denied Se	nt Availability
REFERRAL: EDIT			
Client			
Referred Program			
Referred Program Opening			
Referred to Agency			
Referring Agency			
Referred Date			
Days Pending			
In Process			
Qualified			
Referred by Staff			
Case Manager			
Last Activity	06/04/2018	CHECK-IN	





Status	Pending	Ŷ	>	
Private				
			SAVE CHANGES	CANCEL
REFERRAL CONNECTIO	INS			
			There are no results	s to display
NOTES				

- Step 5: In the Yellow highlighted circle is that status where there is a drop-down box. You should be able to select the following depending on the situation
  - **Pending:** This is when a referral has been made but nothing else in HMIS has been done (Person is currently removed from the queue).
  - **Pending In Processing:** This should be selected and saved when the referral has been received and contact attempts have begun. (This removes the person from the queue as well, and indicates to CEA you have acknowledged this referral and are working on connecting with the person).
  - **Denied:** This should be selected and saved, updating the referral when the client is not able to be contacted, the client is not eligible, the client refuses the referral, or for any other reasons the referral is no longer viable. The denial reason and notes should be concise and transparent.
  - Expired: SHOULD NEVER BE USED
  - **BOS Options:** SHOULD NEVER BE USED



RE



Status	Denied V
Send to Community Queue	Yes 🗸
Denied By Type	Client 🗸
Denied Reason	✓ Select
Denied Message	[All] Denied by Property Manager (site-based only) [All] Full Capacity/No Availability [All] Ineligible: Provider Denial
Private	[All] Ineligible upon referral [All] Self Resolved - Client Housed [All] Unable to connect with client
	[BOS Only] Client did not show up or call [BOS Only] Client out of Jurisdiction [BOS Only] Client previously received service [BOS Only] Disagreement with rules [BOS Only] Ealsification of Decuments
FERRAL CONNECTIONS	[BOS Only] Referral time expired

**NOTES:** There may be times where you would like to add a Note to the pending referral, either for your reference, or to inform others on various details related to the referral. In Clarity, there are a few different areas to add notes. For these purposes, notes should be entered under Referrals, in the Pending Tab. If you are denying a referral, be sure to add detail related to the reason of the denial. For example, "contacted client on 3 separate occasions, X, X, and X, with no response" instead of "couldn't get ahold of client".





REFERRALS		
Dashboard Pending	Community Queue Analysis Completed Denied Sent Analysishity Open Links	
REFERRAL: EDIT		
Client	Training Profile	
Referred Program	Project HOME	
Referred to Agency	[KC] Home Agency	
Referring Agency	[KC] Home Agency	
Referred Date	05/05/2020 4:55 PM	
Days Pending	109 day(s)	
In Process	0 day(s)	
Qualified	No	
Referred by Staff	Stacy Holmes	
Case Manager	Seect V	
Last Activity	10/09/2020 CHECK-N	
Status	Pending V	
Private		
	SAVE CHANGES CANCEL	
REFERRAL CONNECTIONS	AND COM	INECTION (+)
	No results found	
NOTES		
NOTES		
BII		
	SEND NOT	

# Enrolling CEA Prioritization Referrals

Once you have acknowledged the referral from CEA, the last step will be to enroll the client into your housing program.

- Step 1: Login to clarity
- Step 2: Click the Search tab
- Step 3: Click Referrals tab
- Step 4: Click Availability





REFERRALS	Last
Panding Community Quays Completed Danied Sant Availability	19

• Step 5: Select your program under 'Program Availability' (make sure it's toggled to 'Limited Availability')

	Pending	Community Queue	Completed	Denied	Sent	Availability				
	Program	Availability	)							
							)	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
➡	-							FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY

Your referrals will be listed under 'Reserved Openings' below any current openings posted in the program.

		FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY	^
There are no available openings					
RESERVED OPENINGS					
Opening	Client		Referred Date		
	$\bigcirc$				
		-			

• Step 6: Click on the client's name listed under 'Client'. This will take you to the profile of the client.





		PROCRAMS		NOTES	EII EQ	CONTACT		
FROFILE	HISTOR	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOUATION	REFERRALS

• Step 7: Click on the Programs Button. Scroll to your program.

PROFILE	HISTORY	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS				
PROGR	AM HISTO	RY										
						There	are no result	s to display				
PROGR	PROGRAMS: AVAILABLE											

- Step 8: Select the drop-down button on the right-hand side. It will show active clients and occupancy and other information. Scroll down past 'Program Availability' and 'Housing Availability'
- Step 9: Select Enroll

	<ul> <li>100 % Individuals</li> </ul>		■ 0% ■ -31%	Reserved Available		
*	Funding Source HUD-CoC - Permanent Supportive Housing Availability Limited Availability	Service Categories: ✓ Health Care ✓ Education		✓ Housing ✓ Case Management	✓ Employment	
PROGRA	M AVAILABILITY:					
▶ Ava	illable openings					
HOUSIN	G AVAILABILITY:					
► Hot	useholds without children					13 Beds in 13 Units
of Refe	Program Placement a result rral provided by RINT DIRECTIONS DOC					ENROLL





- Step 10: Complete the enrollment form for each family member you are enrolling
- Step 11: Select 'Save & Close'



Please refer to the current version of the CEA Policies and Procedures Manual manual, available on the King County CEA for policy on External Fills:

https://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/co ordinated-entry/providers.aspx

Housing providers are encouraged to post any available housing resources in Clarity HMIS by 3:00PM the day before each population's case conferencing (i.e. Families, Youth & Young Adult, Single Adults, & Veterans). See <u>CEA website</u> for case conferencing dates.

## **External Fill (EF) Process:**



Per CEA policy, units are eligible for External Fill after one instance of case conferencing. Below are the steps for agencies to request and fill housing resources using the External Fill process:

1. Agency emails CEA (cea@kingcounty.gov) in order to confirm they would like their units moved to external fill. See examples below.

#### Example Email - Households Identified for External Fill at time of Request:





### Dear CEA,

Please designate the following units to External Fill **[agency name] [program name] [unit number(s)]** they will be filled by the following Head of Households (HoH) [Unique Identifiers] (designating each unit as needed).

Thank you,

Staff name

## Example Email - Households Not Identified for External Fill at time of Request:

#### Dear CEA,

Please designate the following units to External Fill **[agency name] [program name] [unit number(s)]**. I do not have the Heads of Households (HoH) filled for these units, but will reply to this email when they have been identified.

Thank you,

Staff name

- 2. CEA staff will designate the unit as external fill in HMIS. **Providers are asked not to designate units as external fill themselves.** CEA will notify the agency once the change has been made.
- 3. Once the agency has received confirmation from CEA their request is approved, the agency can then move forward with identifying the household they wish to fill with the unit (if this wasn't sent along with the original request). The Unique Identifiers are then emailed to CEA.
- 4. CEA will refer to the Households in HMIS, and notify the Agency.
- 5. Once Agencies receive confirmation from CEA the referral is complete, they can then enroll the household into the program, thus ensuring the enrollment is linked to the referral.
- 6. Providers will see referral on the Pending Tab and see the referral connection in the program screen. An example of this is in the below screenshots.

You will see the referral on your pending tab when the external fill client is ready to enroll:





Dashboard	Pending Community Queue	Analysis Completed	Denied	Sent Availability	Open Units	
Pending Ref	ferrals					
Search				Mode	Standard	~
Sort By	Default		~	Characteristic	Select	~
Eligible C	Clients Only					SEARCH
Client				Referral Dat	e Qualified	Days Pending
Program: Pr Referred by:	roject HOME : [KC] Home Agency			05/05/202	20 No	149 total 149 pending

Do not enroll until you see the referral indicated on the program enrollment screen

Home Agency Front Door Program	Home Agency Front Door Program						
Project HOME		^					
Active Clients	S						
10 % Families     10 % Individual							
Funding Source Local or Other Funding Source Availability Limited Availability							
PROGRAM AVAILABILITY:							
Available openings     Program Placement a result     of Referail provided by [KC] Home     Agency	Include group members:	1 1 pending referral(s). Oldest 150 days.					
PRINT DIRECTIONS DOC REQUIREMENT	NTS	ENROLL					

**Note:** Adding a UI to a unit posting does not remove the unit or "close out" the opening. The only thing that resolves the unit opening is when CEA sends a referral as an external fill to that unit, which is done when a provider emails CEA with the UI and confirms which opening that person should be referred to. Once that referral is made, the unit is no longer available.

Contact CEA immediately if there are any discrepancies with the above process.