Bitfocus

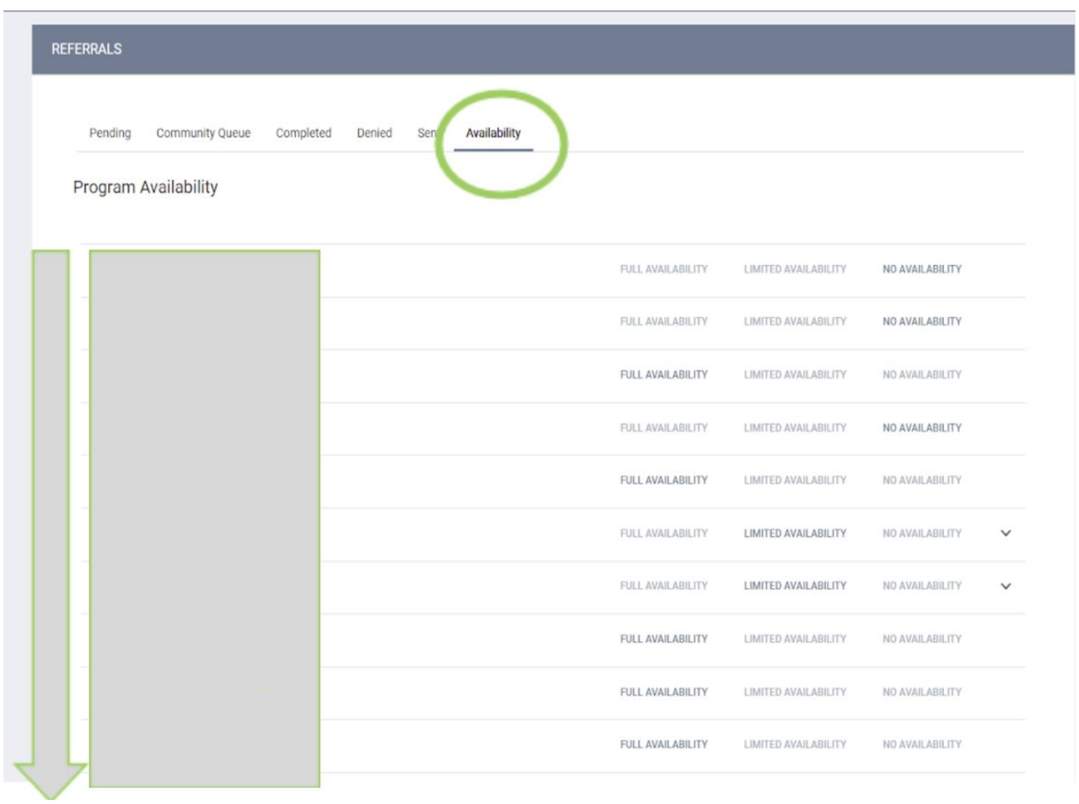
Quick Guide: Posting and Responding to Housing Referrals from CE

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 CE 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.

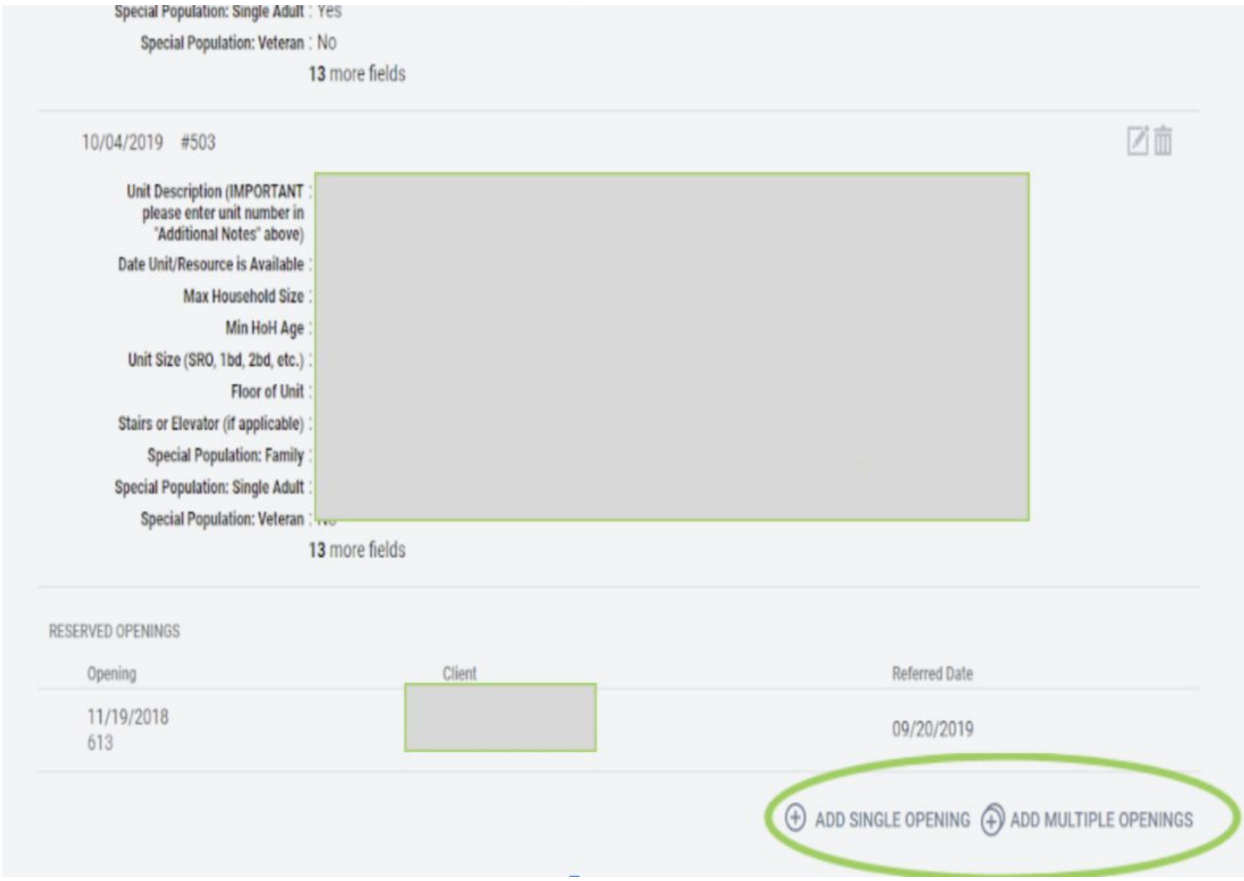
Note: You will need your user role adjusted to access the Referral area in Clarity. If you have questions about your role, contact your HMIS Agency Lead. They will be able to request adjustments for you.

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



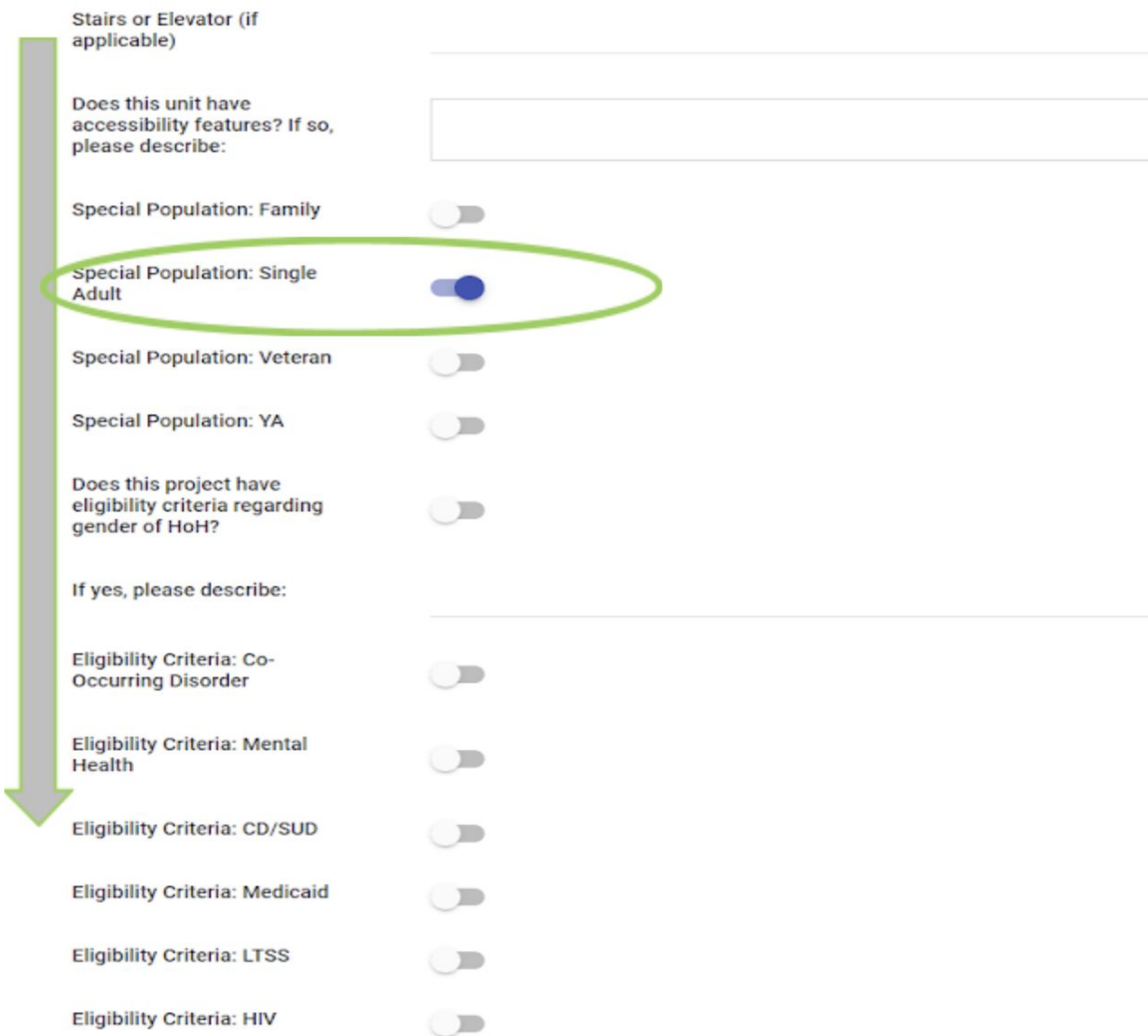
- Step 5: Select your program under Program Availability
    - Make sure it is toggled to "Limited Availability"
    - You will see you open resources and below them you will see the referrals that are pending under 'Reserved Openings'. Under 'Reserved Openings' you will see the option to add a 'single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



- 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'
    - 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

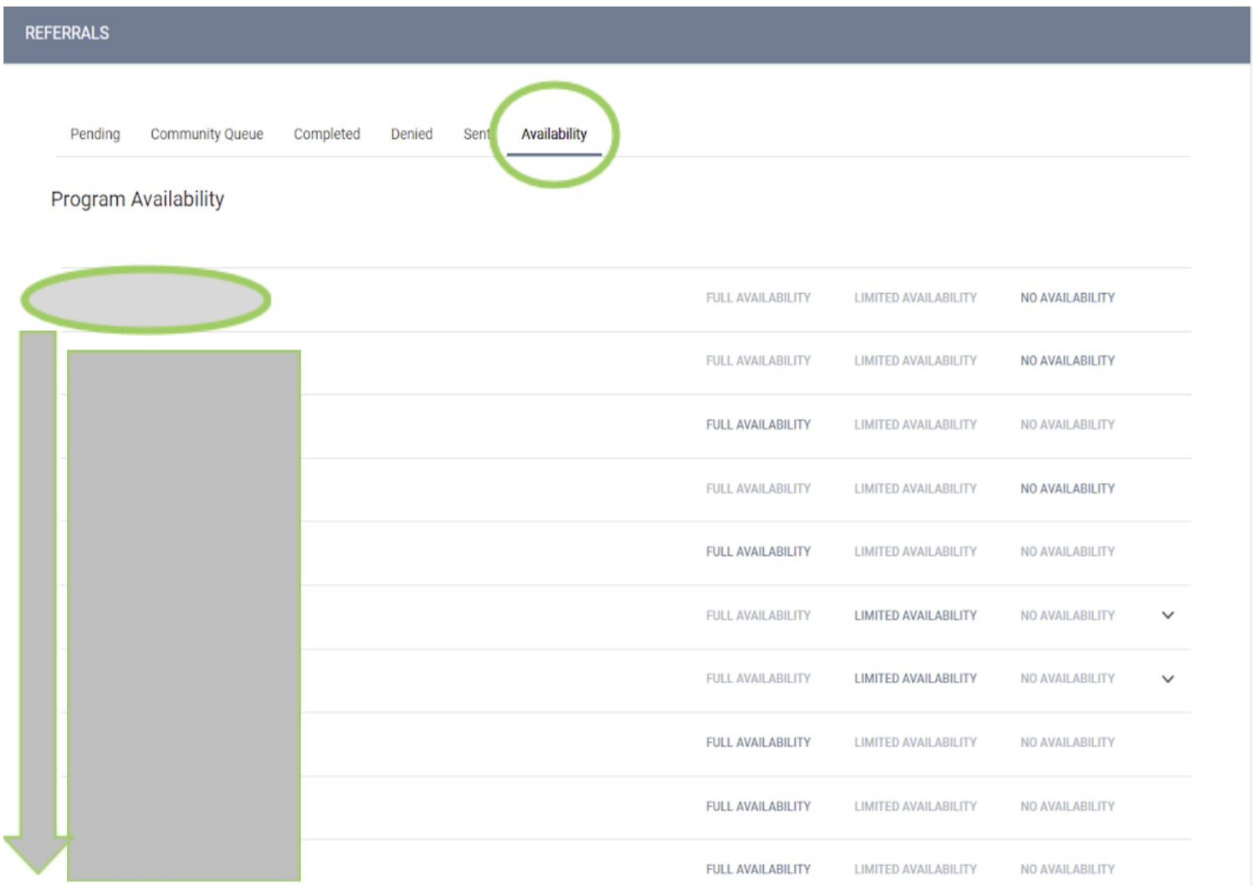
- Step 7: Once all needed info is filled in please use the Special Population toggles if it is an eligibility requirement for the resource, ex: below is an example for a single adult resource



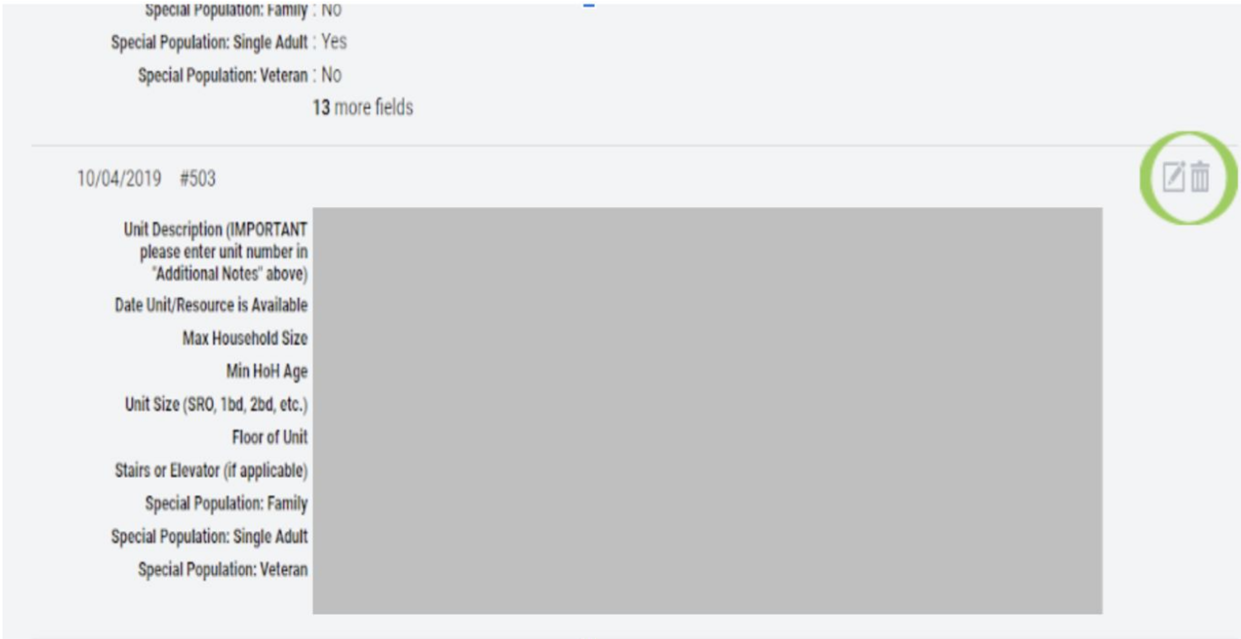
- Step 8: Save changes. This button is located at the bottom of the form.

Deleting Housing Units

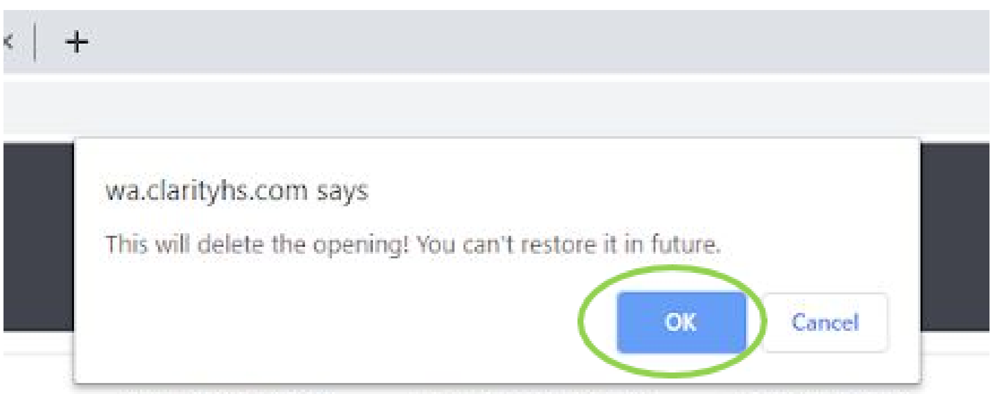
- Step 1: Login to HMIS
- Step 2: Click the Search tab
- Step 3: Select Referral tab
- Step 4: Select Availability under Referrals



- Step 5: Select your program under program availability
- Step 6: Select the trash can on the top Right of the unit opening



A message will appear after you select the trash can



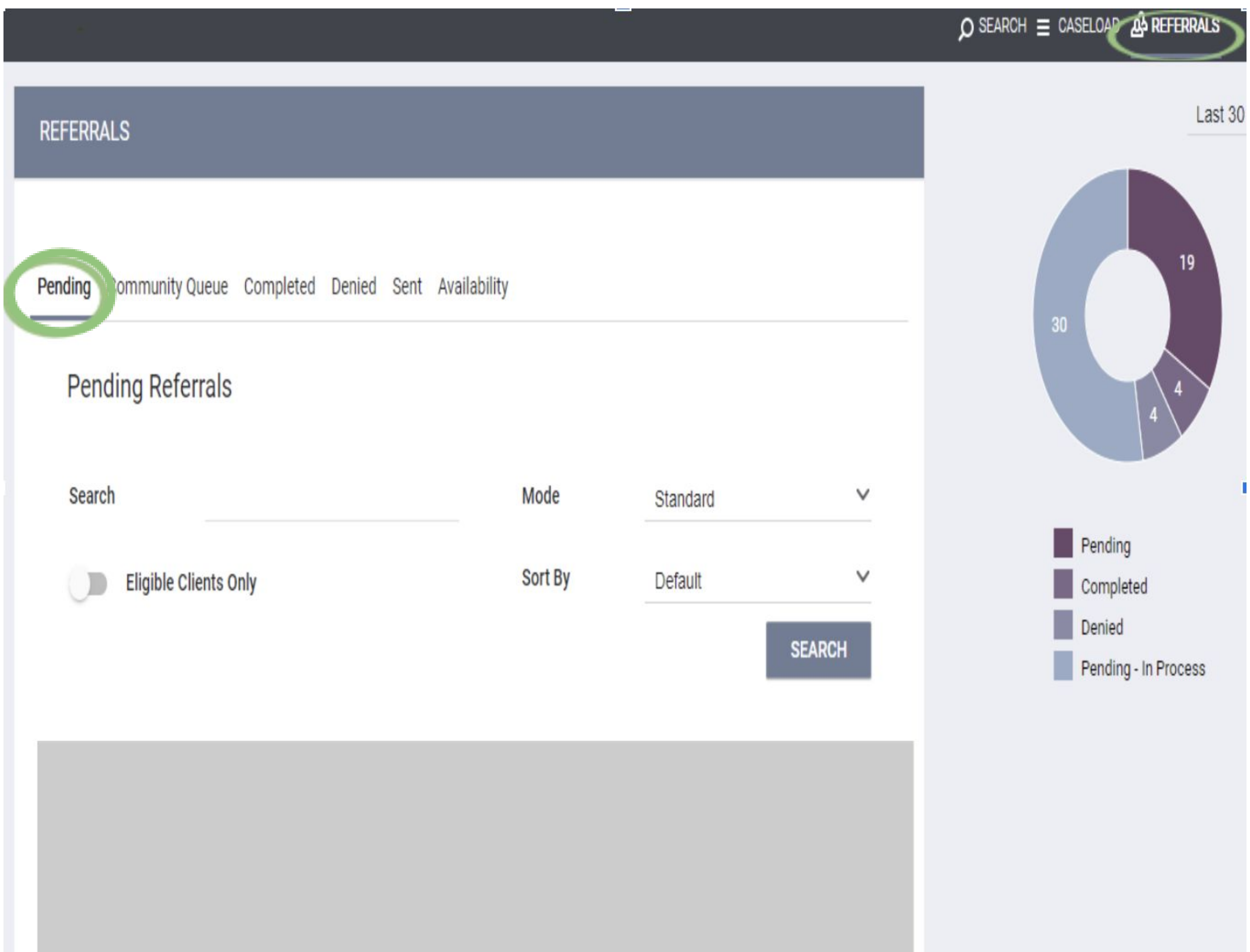
- Step 7: Select OK

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. Please see the External Fill section.</u>

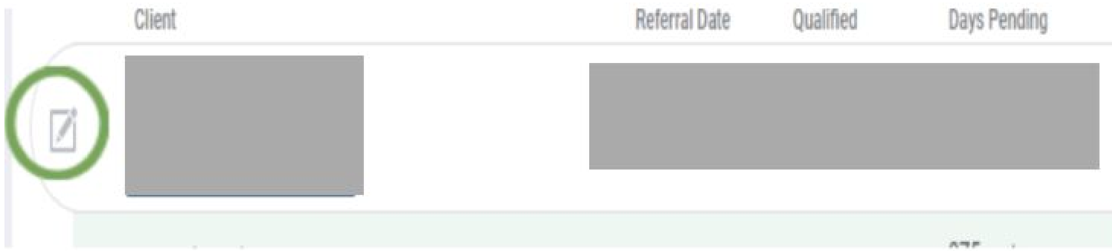
Processing CE Prioritization Referrals

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 CE Referral & Operations Specialist who sent the warm hand off email for assistance.

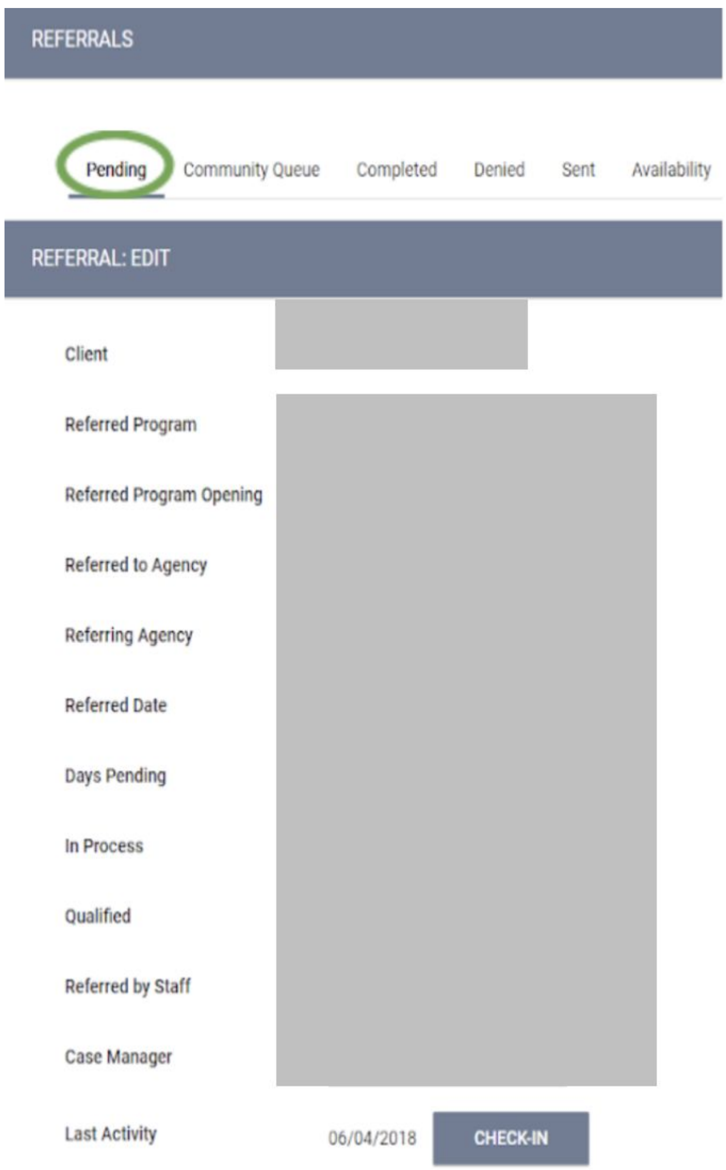
- Step 1: Login to clarity
- Step 2: Click the Search tab
- Step 3: Click Referrals tab and the screen above

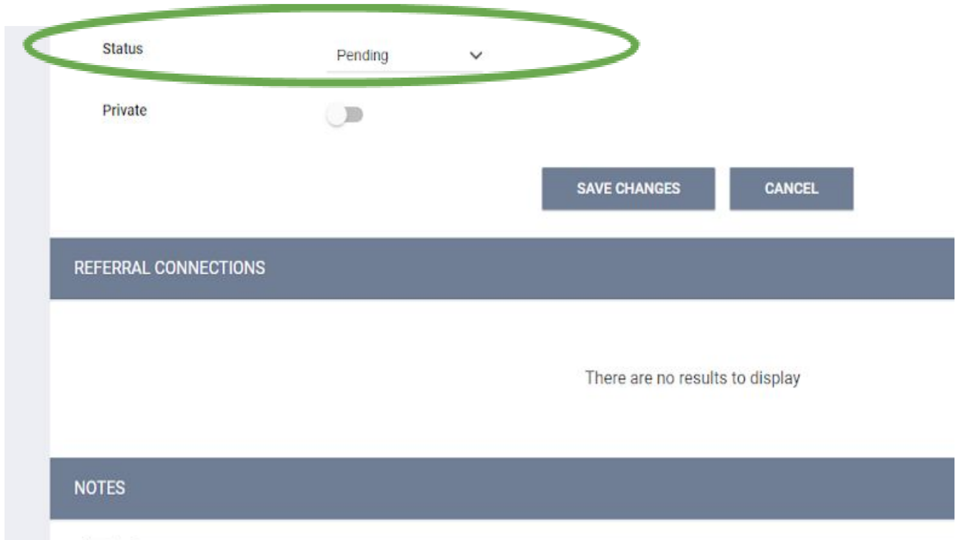


- Step 4: Hover over the edit box to the left of the name of the client and right click the box

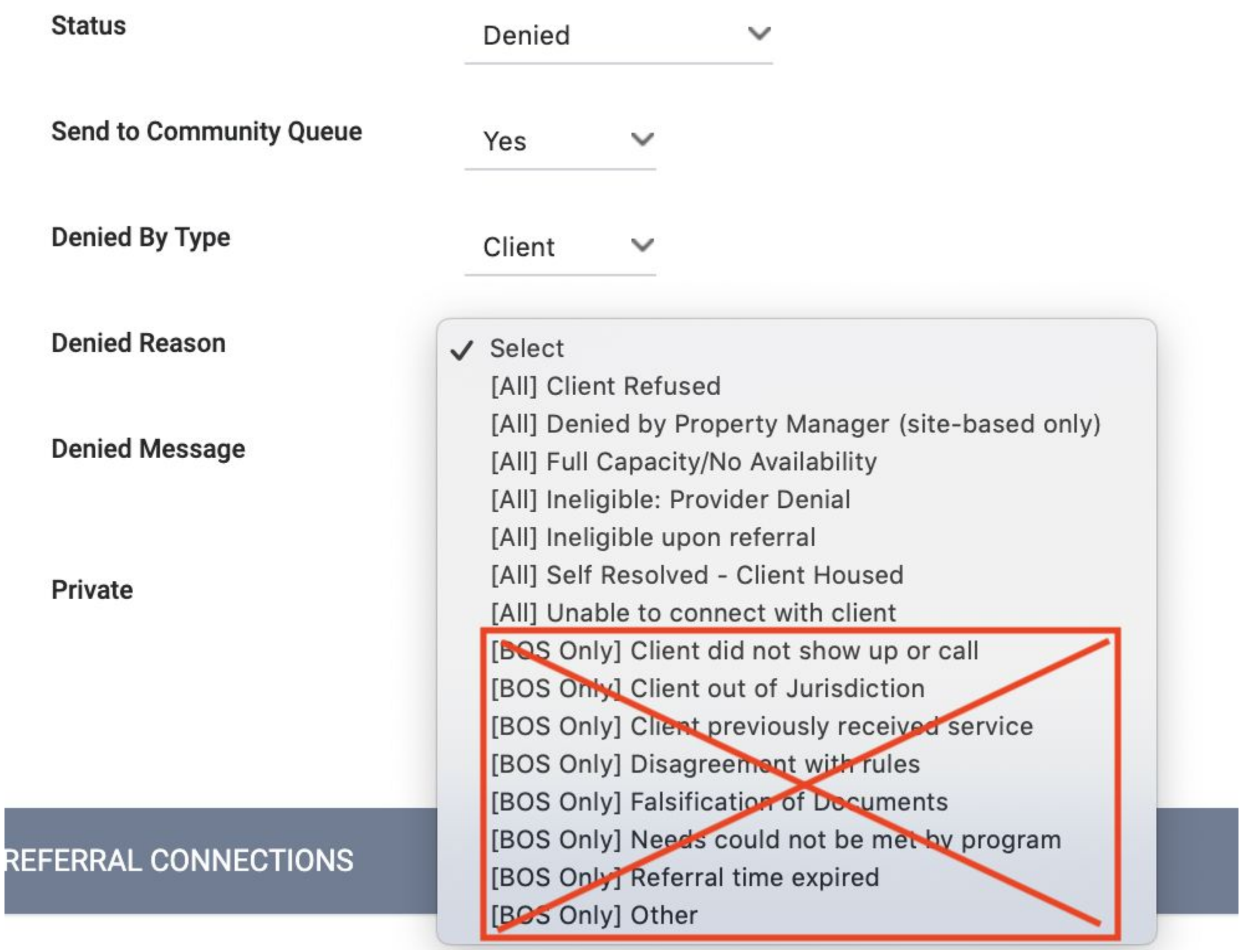


The next page will be brought up.

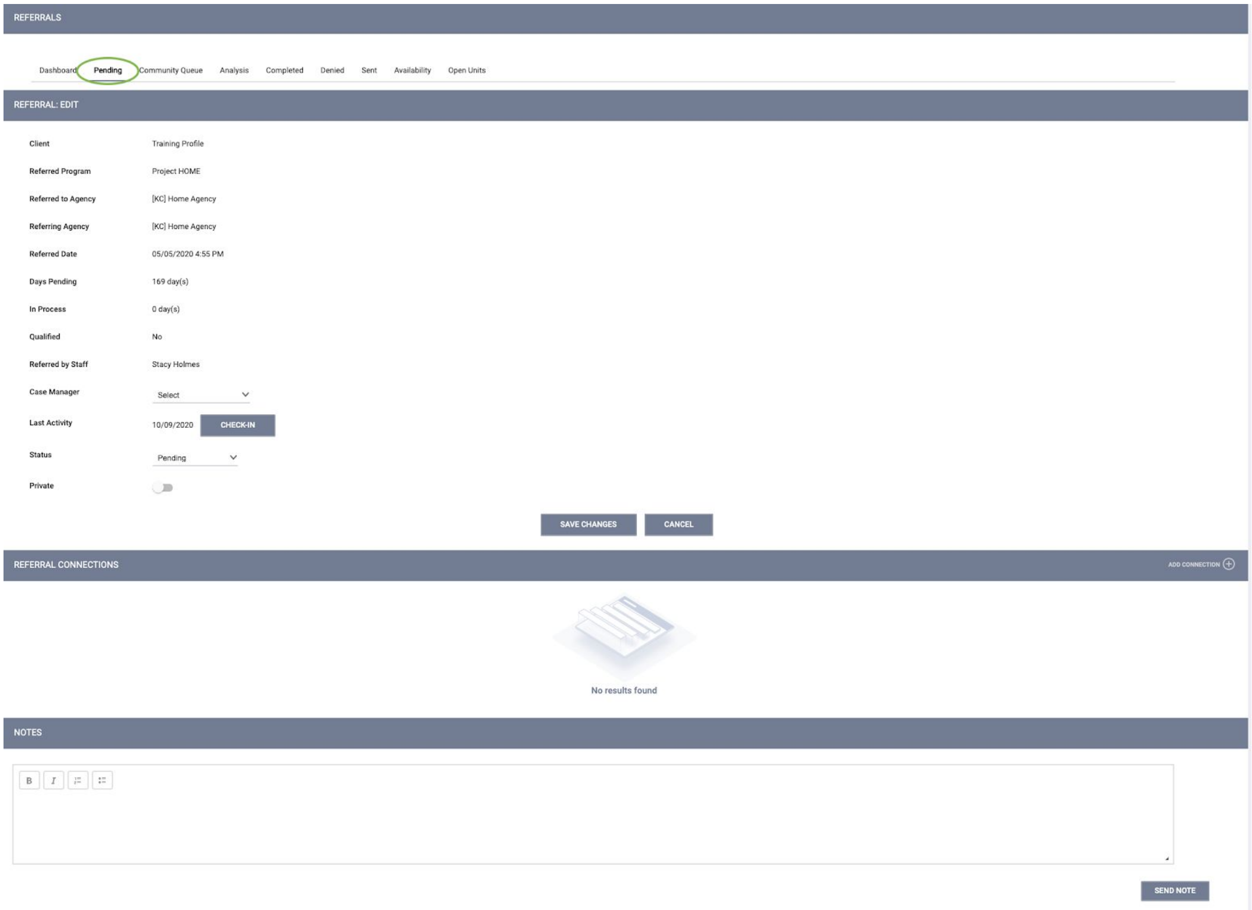




- Step 5: In the Yellow highlighted circle is that status where there is a drop-down box. You should be able to select the following depending on the situation
  - **Pending:** This is when a referral has been made but nothing else in HMIS has been done (Person is currently removed from the queue).
  - **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



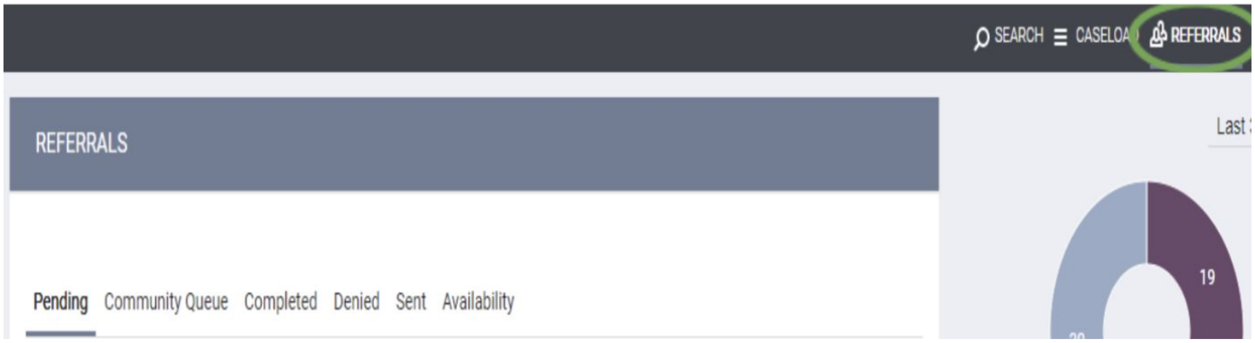
NOTES: There may be times where you would like to add a Note to the pending referral, either for your reference, or to inform others on various details related to the referral. In Clarity, there are a few different areas to add notes. For these purposes, notes should be entered under Referrals, in the 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".



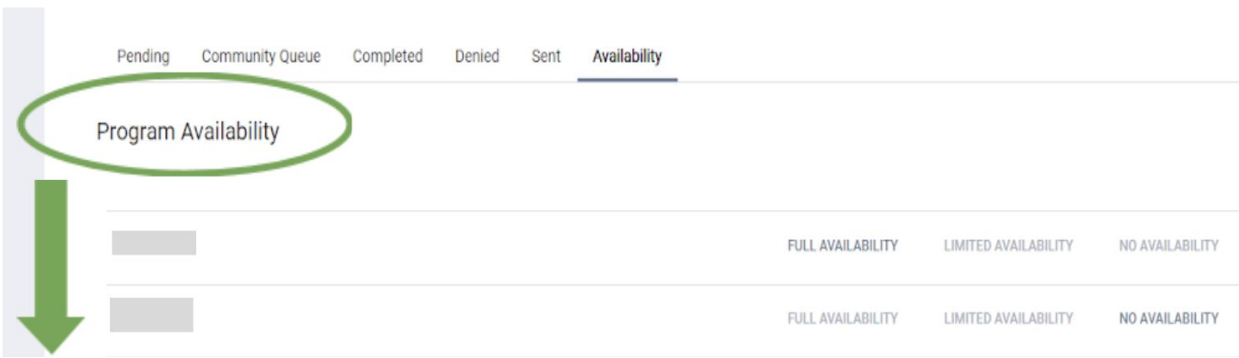
Enrolling CE Prioritization Referrals

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

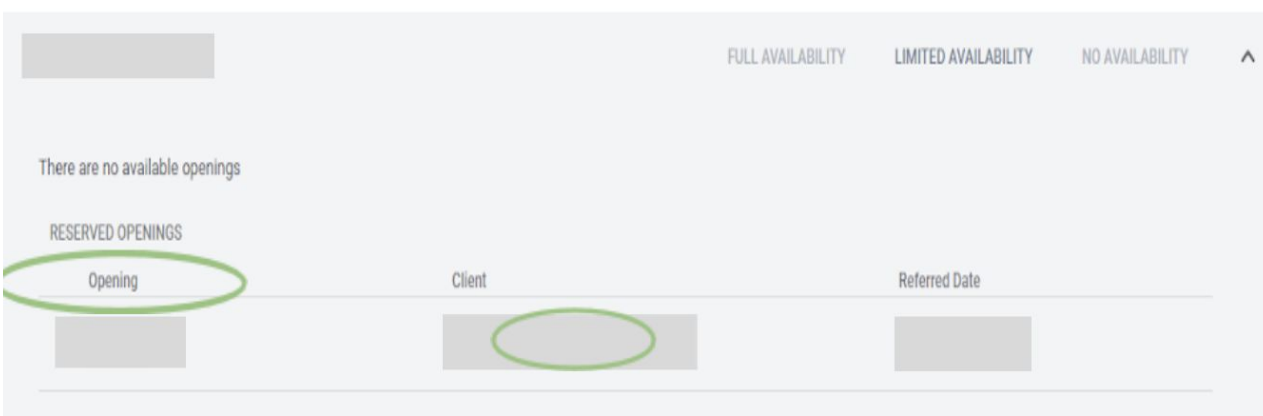
- Step 1: Login to clarity
- Step 2: Click the Search tab
- Step 3: Click Referrals tab
- Step 4: Click Availability



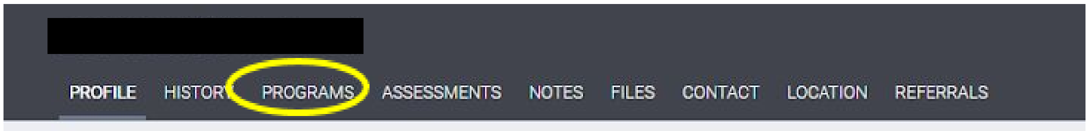
- Step 5: Select your program under ‘Program Availability’ (make sure it’s toggled to ‘Limited Availability’)



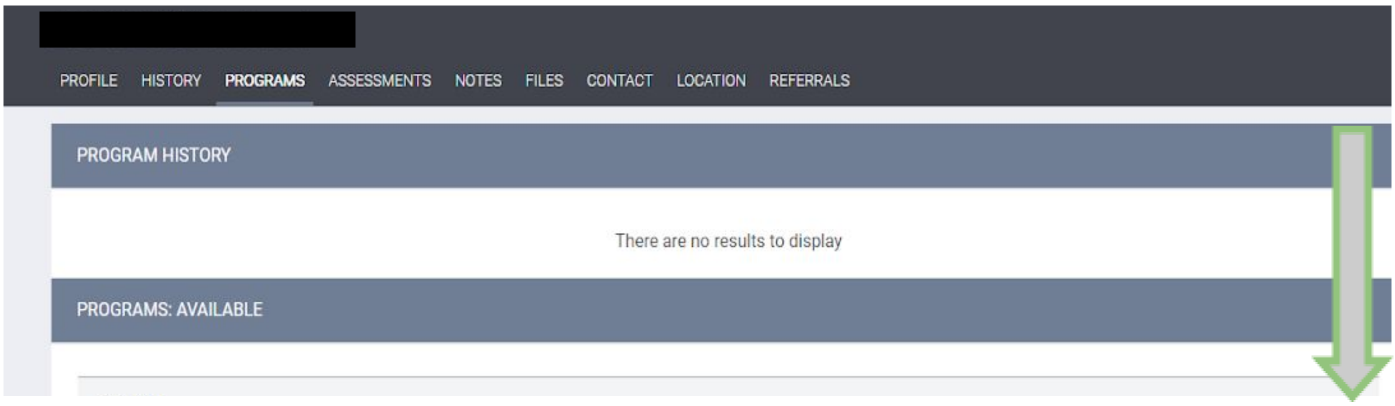
Your referrals will be listed under ‘Reserved Openings’ below any current openings posted in the program.



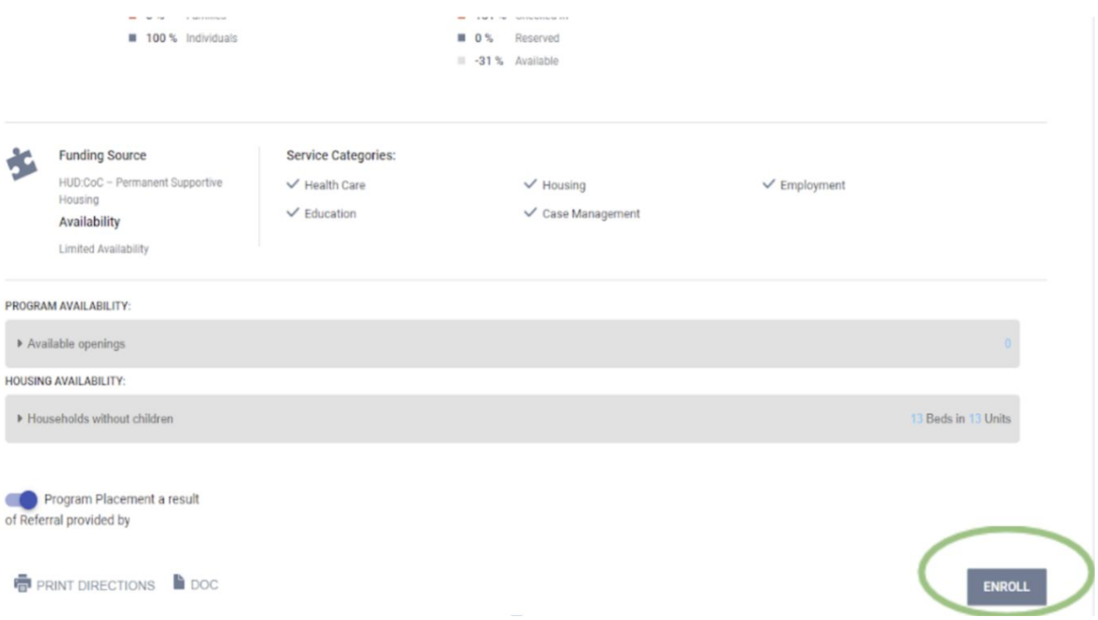
- Step 6: Click on the client’s name listed under ‘Client’. This will take you to the profile of the client.



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



- 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



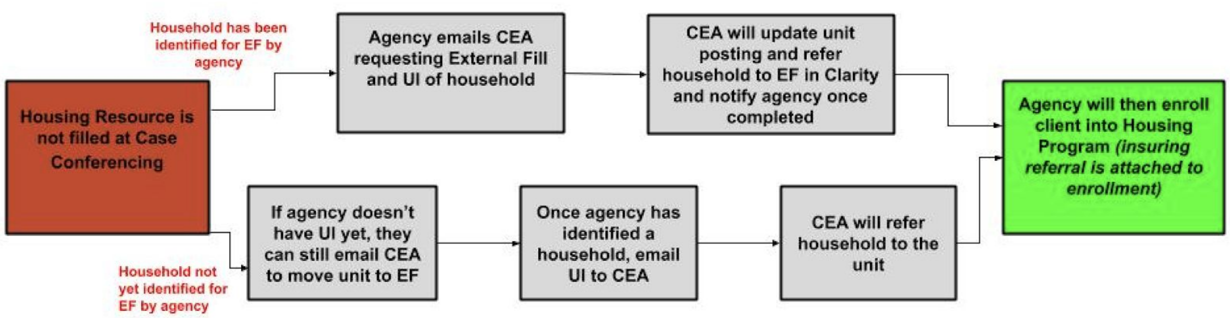
- Step 10: Complete the enrollment form for each family member you are enrolling
- Step 11: Select ‘Save & Close’

Processing External Fills

Please refer to the current version of the CE Policies and Procedures Manual manual, available on the King County CE for policy on External Fills: https://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-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 CE website for case conferencing dates.

External Fill (EF) Process:



Per CE 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 CE (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 CE,

*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 CE,

*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.*

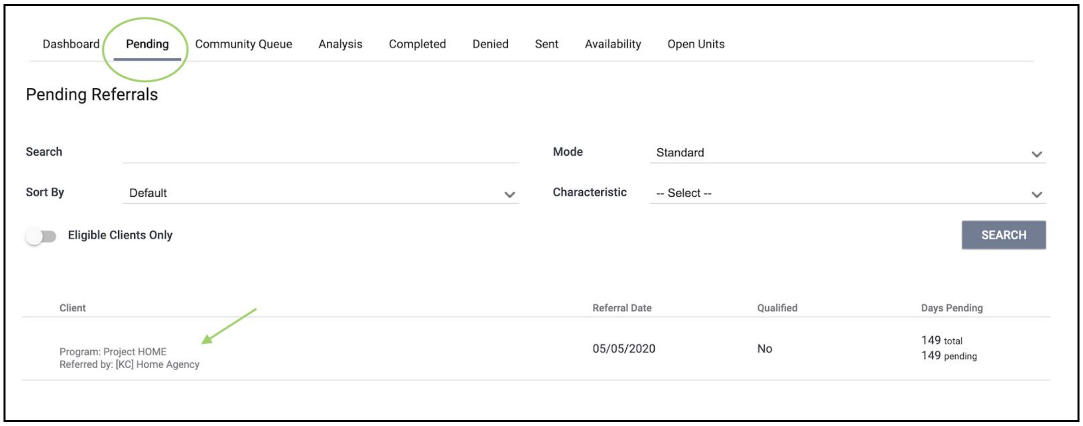
Thank you,

Staff name

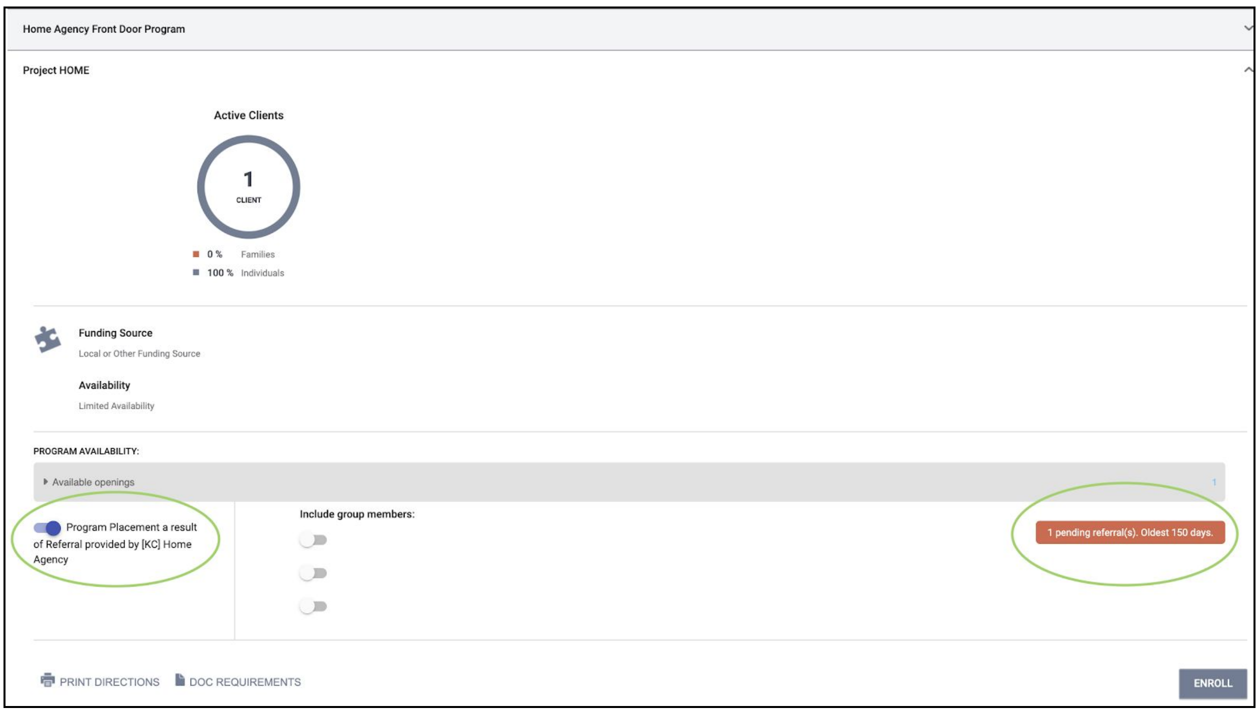
2. CE staff will designate the unit as external fill in HMIS. **Providers are asked not to designate units as external fill themselves.** CE will notify the agency once the change has been made.

3. Once the agency has received confirmation from CE 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 CE.
4. CE will refer to the Households in HMIS, and notify the Agency.
5. Once Agencies receive confirmation from CE 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:



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



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 CE sends a referral as an external fill to that unit, which is done when a provider emails CE 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 CE immediately if there are any discrepancies with the above process.