Provider Instructions for Inventory Launch

Purpose: This checklist will guide you through updating and verifying your agency's Inventory data in HMIS. These steps should be completed for every active project of the following project types:

- Emergency Shelter (Entry/Exit only)
- Transitional Housing
- Safe Haven
- All Permanent Housing projects (including RRH)

Summary: Agencies are expected to complete steps 1-5 by July 12 (CE Units) and Step 6 (all units) by August 24.

1. Confirm you can see your agency's Buildings and Units in their respective Management screens.

2. Verify CE-participating units are designated as such

3. Update and verify CE unit and building attributes

4. Update and verify CE unit statuses

5. Update active enrollments so each head of household is assigned to a unit

6. After all CE units are up to date, move on to the rest of your agency's inventory.

Details on how to complete each step are listed below.

Priority 1: Coordinated Entry Units

Deadline: July 12

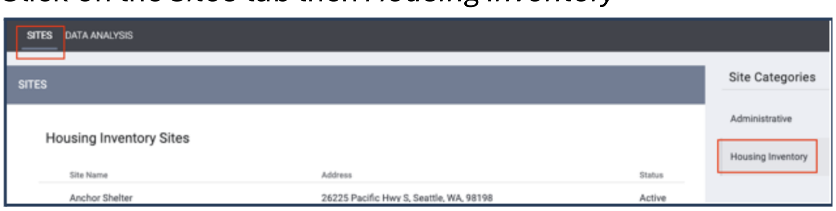
Coordinated Entry will be in a blackout period August 15-16, during which pre-existing pending referrals will be recreated as referrals to specific units. Starting August 19, all new CE referrals will follow the new Inventory workflow. Between July 12 and August 14th, providers should be attaching clients to units upon enrollment, but continue posting CE units via the old method.

Note Steps 1-4 apply to folks who are responsible for managing their agency's inventory and need to be able to edit **all** attributes of their inventory. If that's you, you will need access to the building and unit management screens (see step 2b). If you will only be updating the status of individual units (like making them offline or online and assigning enrolled clients to units), then you only need access to the main Inventory dashboard (step 1a). Steps 5-6 can be done by anyone who has access to the Inventory dashboard.

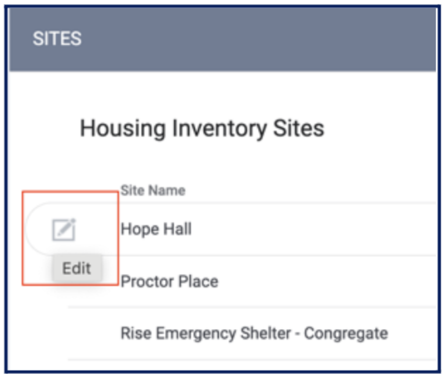
Step 1: Confirm that you can view and edit your agency's Inventory units.

a. Log into Clarity and click the Launchpad (nine squares). Select *Manage*

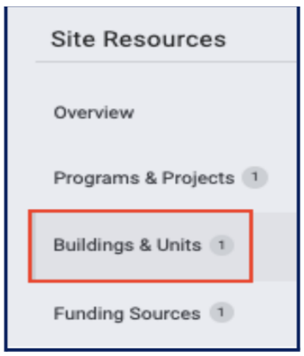
b. Click on the *Sites* tab then *Housing Inventory*



c. Click *edit* next to the Site Name

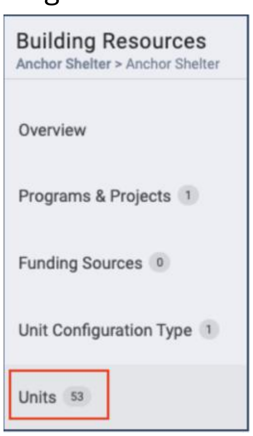


d. Click on *Buildings & Units*



e. Click *edit* next to the Building Name to get to the Building Management Screen

f. To get to Unit Management Screens, select *Units* from the right sidebar

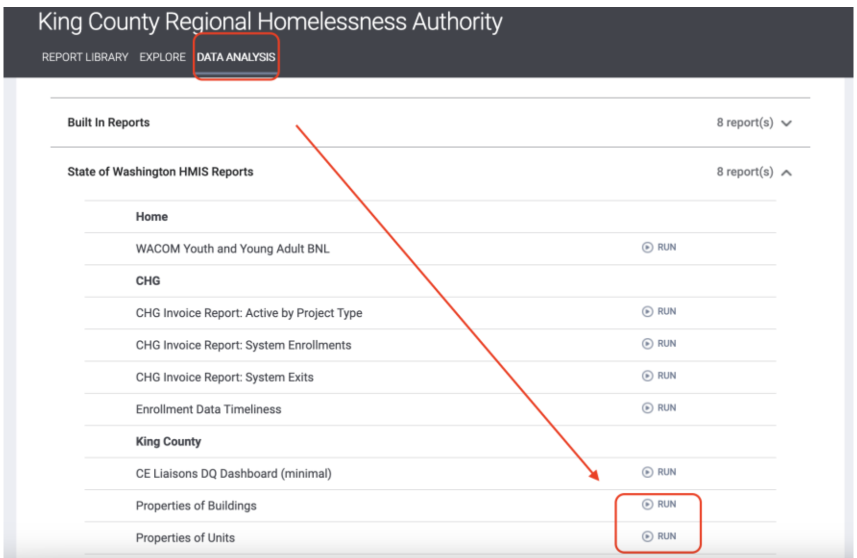


g. Click *edit* next to a Unit's name to get to that unit's management screen.

If you need to access the Building and Unit management page and can't get to those pages after following these instructions, you likely need to have your access role updated. Please email kcsupport@bitfocus.com (and cc your agency's HMIS lead) to request that it be updated.

Step 2: Use the "Properties of Units" report to verify that all CE-participating programs have units configured.

a. From the home page, select the nine squares and click "Reports".
b. Navigate to the "Data Analysis" tab. If you don't see the Data Analysis tab, you likely need your access role updated. Email kcsupport@bitfocus.com and cc your HMIS lead to request that update.
c. Click the arrow next to "State of Washington HMIS Reports". Then press Run for the Properties of Units reports.



d. From the Properties of Units report, verify that there are units for each of your CE-participating projects. If your agency did not previously submit inventory data for a project, it will not appear in this dashboard. If that's the case, your HMIS lead should have recently received an email from either Janelle Rothfolk or Joel Bernstein requesting a workbook be filled out for the additional projects. Please complete and submit those workbooks as soon as possible, as those units need to be manually configured by the KCRHA and Bitfocus team. If you're missing units in the Properties of Units report and haven't received a workbook to fill out, please email jannelle.rothfolk@kcrha.org with the program you're missing units for.

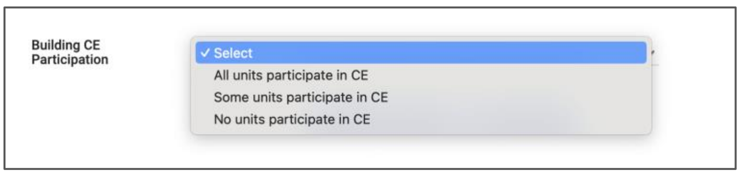
Step 3: Designate units as participating in Coordinated Entry System.

There are two places to designate a unit as CE-participating: at the building level and at the unit level. If a building is designated as either “All units in building participate in CE” or “No units in building participate in CE”, then CE participation does not need to be added at the unit level. CE Participation must be added on the unit level for buildings with “Some CE units in building participate in CE” selected

Programs with scattered site housing (mainly RRH programs) do not have a building associated with them, so CE participation must be designated on the unit level (Step 3f).

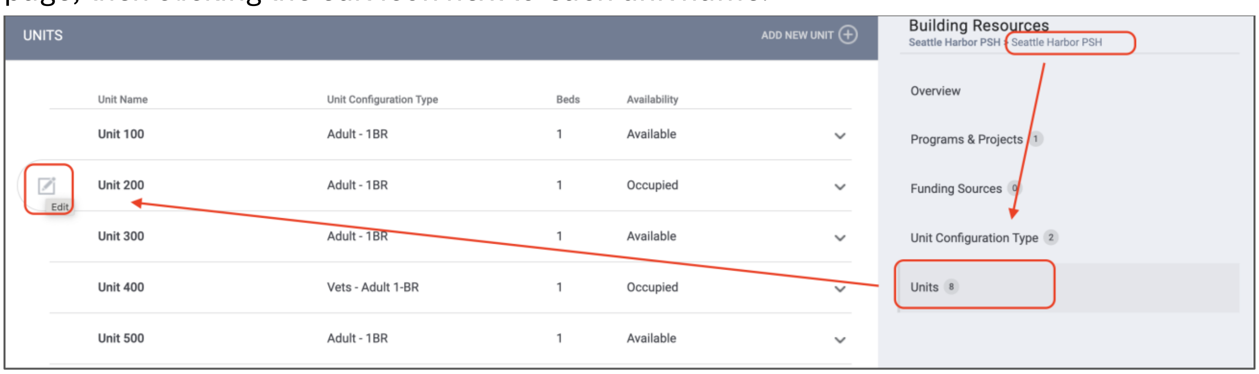
a. Use the instructions in Step 1 to navigate to each of your Building Management Screens.

b. Scroll to the bottom of the page and set the building’s CE participation status



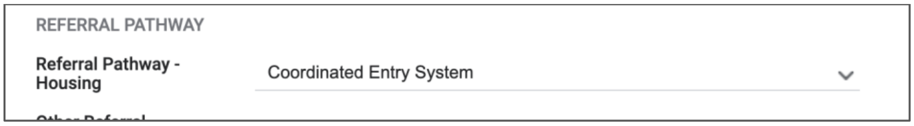
c. Use the Properties of Buildings report under the Data Analysis tab to keep track of each building’s CE designation.

d. Only buildings where some units participate in CE need to have unit-level designations. In addition to the main Inventory page, you can also get to the Unit management page by selecting the “Units” menu from the building management page, then clicking the edit icon next to each unit name.



e. Some units may already have a CE designation from previous data collection. Use the Properties of Units report to see which, if any, additional units need a designation.

f. For any units participating in CE, scroll down to “Referral Pathway- Housing” and select “Coordinated Entry System”. If any of the other more specific referral pathways apply, choose those. For scattered site programs, this field must be used to designate CE participation. If the unit does not participate, it can be left blank.

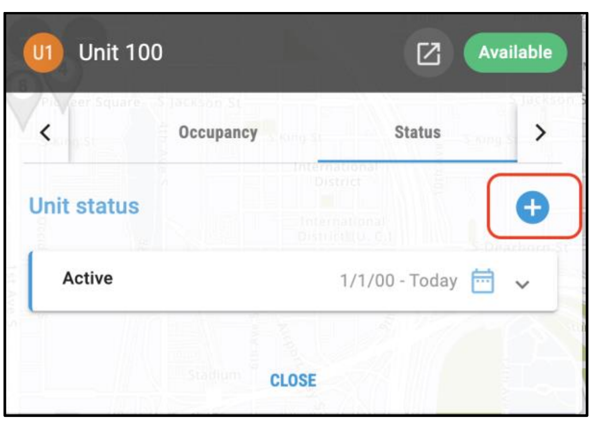


Step 4: Update and verify the remaining information for CE-participating buildings and units.

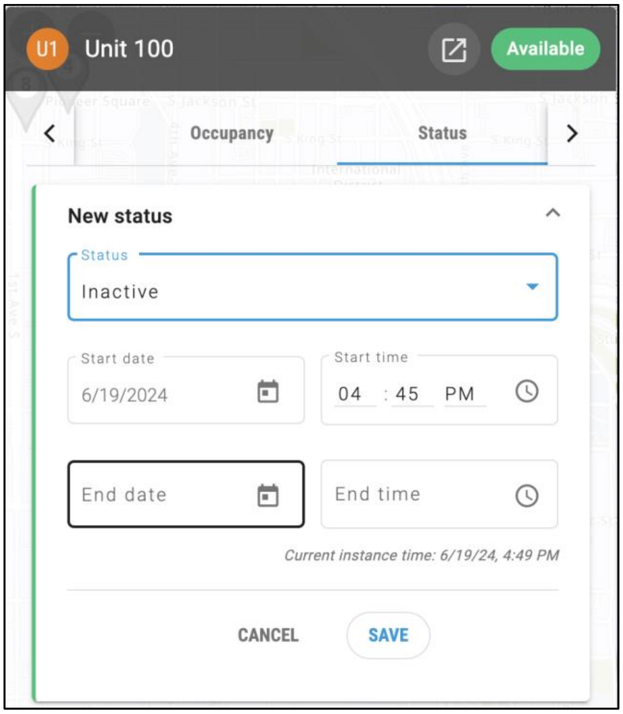
a. Open the Properties of Building and Properties of Units reports to see the rest of the information on CE-participating units and buildings
b. Navigate to the unit and building management pages to make any corrections or additions.
c. For Rapid Re-housing projects, you do not need to fill in details about the physical attributes of a unit or building. Instead focus on eligibility-related fields so the CE matchmakers and assessors know which units a client may be eligible for. Name your units “Slot 001”, “Slot 002”, etc. to reflect that RRH “units” represent program slots rather than specific physical units.

Step 5: Update and verify the status of each CE-participating unit.

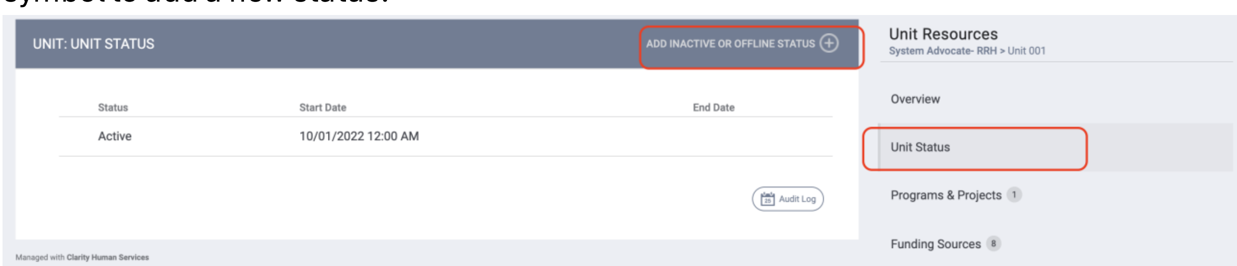
a. Use the Properties of Units report to identify which units need to have their status updated. The three options are Active, Offline, and Inactive. Any unit that is currently occupied, pending occupancy, or available should be marked as active.
b. To update a unit’s status, first navigate to the Inventory dashboard and find the unit you’d like to update. Go to the “Status” tab and click the plus icon next to “New Status”



c. Select the new status and add a start date. The current status will end as of the start date of the new status. If moving a unit offline, you will have to enter an offline reason.



d. If your access role allows, you can also change the Unit status from the management screen. Click on the "Unit Status" tab on the right, then click the plus symbol to add a new status.

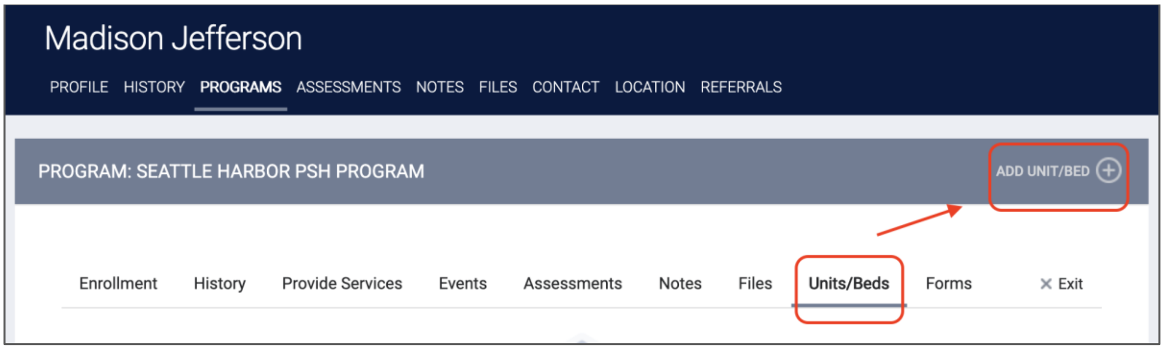


e. RRH projects should keep a number of CE-participating units offline in case they add capacity without another client exiting the project. If that happens, change one of those units' status to online so that CE staff know the unit is available for a referral.

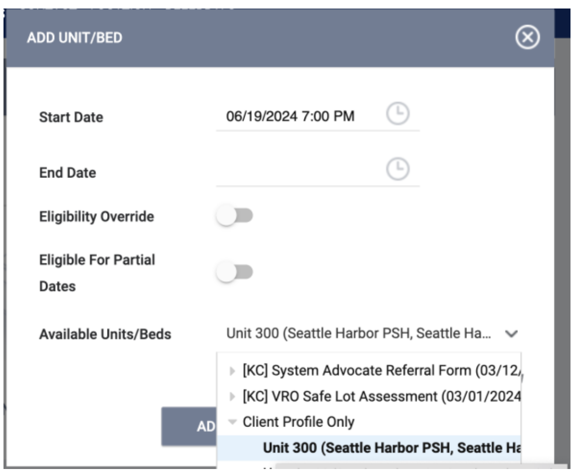
Step 6: Assign clients to units.

Some clients may already be assigned to a unit as a result of earlier data collection. More recent enrollments, however, will not be attached to a unit yet.

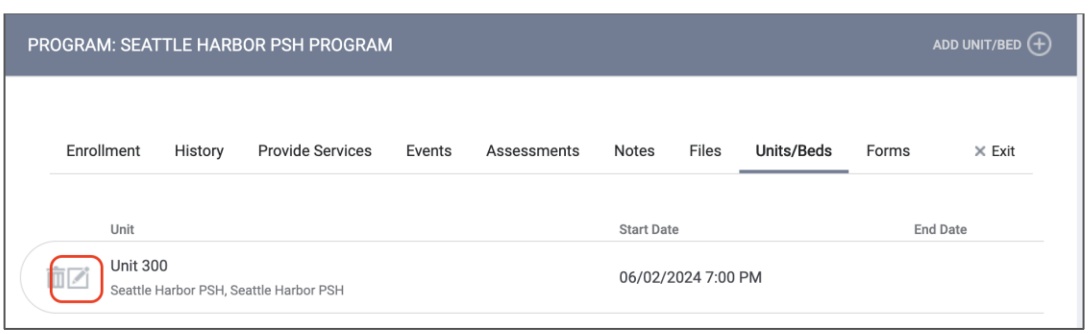
a. Use the Program Roster report to see which clients are already assigned to a unit. The Program Roster report is under “Program Based Reports” in the Report Library.
b. Only heads of households need to be assigned to a unit. To assign a client to a unit, first enter their enrollment screen, then navigate to the “Units/Beds” tab.
c. Select “Add Unit/Bed”



d. The Start date should match when the client first entered the unit. Under “Available Units/Beds”, select “Client Profile Only” then select the appropriate available unit.



e. If a unit isn’t showing up as available, it’s likely because its status is offline or inactive, or another client is assigned to the unit.
f. If you need to exit a client from a unit, go to the client’s Units/Beds tab select the edit icon next to the unit's name. Then enter the appropriate end date for the client in that unit.



Your Coordinated Entry inventory should now be fully up to date and ready for launch! Thank you for your patience and attention to detail with this new system. Please email lia.fakhouri@kcrha.org and let her know you have finished preparing up CE units.

Priority 2: Non-CE Programs

Deadline: August 24

Repeat Steps 1-2 and 4-6 for all non-CE units and programs. All Inventory data must be up to date by August 24.

We will be holding open office hours starting Friday 6/21 at 10am. Starting the following week, office hours will be every Wednesday from 2-3pm. In the meantime, feel free to email joel.bernstein@kcrha.org, janelle.rothfolk@kcrha.org, and kc-admin@bitfocus.com with questions.