

# **Coordinated Entry for All Housing Assessor Manual V7**

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# Vision

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Coordinated Entry for All (CEA) strives to ensure that people experiencing homelessness have fair and equal access to available housing resources by matching the needs and vulnerability of the household with the corresponding housing resources available through CEA. The system works with eligible participants to understand their strengths and needs by practicing a common triage protocol and connecting households to the appropriate level of assistance that will address their current housing crisis. Through the use of standardized tools and practices, CEA aims to incorporate the principles of a system-wide housing first approach while prioritizing those with the highest service needs.

Coordinated Entry for All 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 households who are experiencing homelessness gain access as efficiently and effectively as possible to available community interventions;
- ❖ Prioritize households for limited housing resources based on need and vulnerability;
- ❖ Provide clarity, transparency, consistency, and accountability throughout the triage and referral process for households experiencing homelessness, community partners, and homeless and housing service providers; and
- ❖ Facilitate exits from homelessness to stable housing in the most rapid manner possible.

For an overview of King County’s CEA system, FAQs, the CEA Operations Manual, updates, forms, trainings and resources in various languages go to [www.kingcounty.gov/cea](http://www.kingcounty.gov/cea)

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.<sup>1</sup>

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<sup>1</sup> <https://www.hudexchange.info/resources/documents/Coordinated-Entry-Policy-Brief.pdf>

# Roles and Responsibilities

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## 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 CEA. 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 CEA and the household.

- Assessors will meet with households in an environment that protects privacy and confidentiality.
- Use culturally and linguistically competent practices.
- Assessors will inform clients of the limitations of confidentiality.
- Assessors will only disclose information about a household to assist the individual or family in obtaining housing and services. **Specific diagnosis or disability information may only be obtained for purposes of determining program eligibility to make appropriate referrals.**
- 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.
- Assessors will not attempt to influence the outcome of a triage score. If a triage tool needs to be “flagged” for specific reasons, the assessor will follow the CEA protocol for flagging a triage tool.

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

All Housing Assessors are required to complete CEA Housing Assessor Training with their agency designated Train the Trainer (T-3) CEA Certified Trainer and attend two Assessor Refresher trainings in a 12-month period. Once trained, the new Assessor will complete the CEA Housing Triage Tool with individuals and households in need of housing that are vulnerable and have no other housing alternatives outside of CEA. Regional Access Point (RAP) staff will discuss Path to Home and employment navigation before completing a triage tool to assess for options outside of CEA See page 10. When possible, the Housing Assessor will connect the individual with a Housing Navigator. Housing Assessors' responsibilities include, but are not limited to the following:

- Operating as the initial contact for the CEA and communicating eligibility for CEA.

- Exploring resources other than homeless housing programs, such as Path to Home and/or employment/education.
- Administering the CEA 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
- Participating in case conferences as needed
- Notifying households about other services/resources, programs they may be eligible for outside of CEA, 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 and enter the information properly into HMIS or assessment access in HMIS will be discontinued.*

**Flag Review Panel** - Members of the Flag Review Panel will review the triage tools that have been flagged by a Housing Assessor indicating that a household's level of vulnerability may not be accurately addressed through the triage process. The information presented in the flag review process will be viewed from a person-centered focus in order to support housing referrals for households with high vulnerability.

The review panel will maintain a regular meeting to review triage tools that have been flagged, and identify next steps for referral (see page 30).

**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/Path to Home, connections to employment services, or other supports that will assist in solving the housing crisis, or to complete a CEA Housing Triage Tool when Path to Home or other resources are not an option. It is also the responsibility of RAP staff to ensure that communications with clients are conducted in a safe, confidential, and welcoming environment.

**Coordinating Entity**- King County's Department of Community and Human Services, and specifically the Housing and Community Development Division is the Coordinating Entity for CEA. The Coordinating Entity is responsible for the oversight and direction of CEA, including but not limited to the following:

- Creating and widely disseminating materials regarding services available through CEA

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 case conferences to review and resolve flagged assessments compliance with the protocols described in CEA Operations Manual;
- Managing the client grievances process in compliance with the protocols described in CEA Operations Manual;
- Designing and executing ongoing quality control activities to ensure clarity, transparency, and consistency in order to remain accountable to clients, referral sources, and homeless service providers throughout the coordinated access process;
- Making periodic adjustments to the CEA as determined necessary; and
- Updating policies and procedures.

## CEA Housing Triage Tool (also known as the Assessment)

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The VI-SPDAT (Vulnerability Index – Service Prioritization Decision Assistance Prescreen Tool) has been selected as the Housing Triage Tool for the King County Continuum of Care (CoC) Developed by OrgCode Consulting<sup>2</sup>, the VI-SPDAT is an evidence-informed approach to assessing a household’s acuity. The tool, using multiple components, informs how to prioritize who to serve next and why, while concurrently identifying the areas in the person/family’s life where support is most likely necessary in order to avoid housing instability. The VI-SPDAT is based upon evidence and has undergone rigorous testing, and has been reviewed by experts in health, mental health, substance use disorders, housing and homelessness, and has proven to be effective for a range of populations from an age, gender and cultural perspectives.

CEA uses population-specific versions of the VI-SPDAT. In addition, King County’s adoption of this tool includes supplemental questions that support eligibility for local programs.

There are three population specific version of the VI-SPDAT tool:

- **F-SPDAT:**

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<sup>2</sup> <http://www.orgcode.com/>

The F-SPDAT should be completed when triaging a single woman who is pregnant or a household that has at least one child under the age of 18. One CEA Housing Triage Tool is completed for the entire family unit.

- **TAY-SPDAT:**  
The TAY-SPDAT should be completed with someone who is between 17.5-23.5 years old.
- **VI-SPDAT:**  
The VI-SPDAT should be completed with a single adult who is 24 years of age or older

### **Updates to the Tool:**

The VI-SPDAT receives ongoing updates to incorporate new and stronger evidence and feedback from both staff who have administered the Triage Tool as well as from individuals who have completed the Triage Tool. Coordinated Entry for All currently utilizes version 2 of the VI-SPDAT, first released in May 2015, and will shift to future updated versions of the tool as the CEA Policy Advisory Committee decides by consensus. Once trained on changes to the Triage Tool, the Housing Assessors will adopt the changes.

### **Language support**

CEA 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.

## **Training**

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Housing Assessors are trained by their agency designated CEA Certified Trainer (T-3).

### **Certified Trainers (T-3)**

Certified Trainers (T-3) are existing Housing Assessors that have experience conducting the Housing Triage Tool and entering the information into HMIS. T-3s are selected by their home agency and are required to complete a training hosted by the Coordinated Entity to gain their trainer certification.

Pre-requisites for a T-3 are as follows:

- Complete CEA overview video
- Complete live Clarity General Training Webinar

- Approved/existing CEA Assessor
- Experience using the CEA Housing Triage Tool
- Selected by home agency to be a Certified Trainer

T-3 training certifications will be held quarterly. The T-3 Training Certification will cover the following topics:

- Review on how to conduct the VI-SPDAT and messaging
- HMIS review
- Practice on training Assessors on the Housing Triage Tool
- Identifying effective training practices
- Certification test

### **New Assessors**

New Housing Assessors must complete four steps to become an approved CEA Housing Assessor.

Step 1: Watch the **CEA webinar**. This is an overview of CEA system and processes.

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 offered via live webinar once each week. Schedule a training at <http://kingcounty.hmis.cc/training/schedule-a-training/>

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

Step 3: Complete the **New Assessor checklist and attend an in-person training** with the agency designated, CEA Certified T-3 or the Coordinating Entity.

*A copy of the training checklist can be found in the appendix.*

Step 4: Attend an in-person CEA **Refresher Training** one month after beginning to administer the CEA Housing Triage Tool with clients. The refresher trainings are one 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 trainings are scheduled for once per month.

To retain assessor access in HMIS, all assessors that have completed training must conduct at least 1 CEA 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 CEA Housing Triage Tool

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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 CEA 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 assessor and their agency
- Time duration of the appointment
- If at a RAP, begin with describing Path to Home and/or employment and exploring a plan (see step 2 below). If Path to Home and/or employment is not an option, check HMIS to determine if a triage tool has already been conducted
- If a triage tool has not been conducted move on to administering the triage tool, if a triage tool has already been conducted, update the existing assessment, or if the situation has change such as a YYA turns 25, or a child had entered into a previously single household, conduct a new assessment with using the population appropriate tool.
- Discuss the purpose of the CEA Housing Triage Tool
- Explain that only "yes," "no" or one-word answers are being sought
- Explain where the information is stored within the Homeless Management Information System
- Explain that information will be shared with providers connected to Coordinated Entry for All 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 CEA will not be a viable option, re-approach the subject of Path to Home / Diversion

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

## **Step 2. Discuss opportunity for Path to Home services**

All Housing Assessors at the Regional Access Points should discuss Path to Home 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 a triage tool is administered, households that score 0-3 will only be offered Path to Home, connections to employment resources, or other services and will not be eligible for resources through CEA.

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

For more information about Path to Home please read the CEA Path to Home Manual found on the CEA website <http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.asp>

## **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)<sup>3</sup> and as needed the Department of Veteran Affairs Release of Information form<sup>4</sup> before proceeding to complete the assessment.

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. For children in a household that are over the age of 18, they should sign the consent themselves.

Personal information is not entered in HMIS for people who are 1) receiving services from domestic violence agencies; 2) fleeing or in danger from domestic violence, dating violence, sexual assault or stalking situation; or 3) have revealed information about being HIV positive or having AIDS. **Housing Assessors should follow the refused Consent instructions outlined below under “Refused Consent”.**

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<sup>3</sup> The paper version of the HMIS Client Consent to Data Collection and ROI can be found at <http://kingcounty.hmis.cc/client-forms/>

<sup>4</sup> The Department of Veteran Affairs Release of Information <http://kingcounty.hmis.cc/wp-content/uploads/2015/09/VA-ROI-March-2016.pdf>

Housing Assessors are required to upload either electronically or by PDF, all applicable releases of information into the HMIS database for every consenting household they assess.

### HMIS ROI

The same HMIS Release of Information is utilized by all participating agencies that use HMIS. With this form, a household will understand what HMIS is, the purpose of the form, the information collected, and can give 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 II – 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.

### 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 screenshot shows a web interface with a dark blue header bar. The left side has a 'PRIVACY' section with 'Client Privacy' and radio buttons for 'Public' (selected) and 'Private'. Below are 'SAVE CHANGES' and 'CANCEL' buttons. A red arrow points to the 'ADD RELEASE OF INFORMATION +' button in the 'RELEASE OF INFORMATION' section. The right sidebar has 'Household Members' with a 'Manage' button and 'No active members' text. The bottom of the page says 'There are no results to display'.

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

- Permission: Yes = Client provided consent/ 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 agency per active start/end date range is permitted. The system will 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 the Veterans Affairs ROI, scan and upload those as one PDF. If the household signs electronic HMIS ROIs 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.”

**RELEASE OF INFORMATION**

Permission Yes

Start Date 02/13/2018

End Date 02/13/2025

Documentation
 

- ✓ Select
- Electronic Signature
- Attached PDF

ADD RECORD CANCEL

**Electronic Release**

Clients can now 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.

**RELEASE OF INFORMATION**

Permission Yes

Start Date 02/13/2018

End Date 02/13/2025

Documentation Electronic Signature

E-SIGN DOCUMENT

ADD RECORD CANCEL

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, appears at the very bottom of the release.

**Signature:**

RESET

APPLY

02/13/2018

Otter Zoo

SAVE CANCEL

Once the client signs in the box, select “Apply.”

**Signature:**

RESET

APPLY

02/13/2018

Otter Zoo

SAVE CANCEL

Once you select “Apply,” the option to apply disappears. If the client 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.

**Signature:**

RESET



02/13/2018

Otter Zoo

SAVE CANCEL

A red arrow points to the SAVE button.

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

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	02/13/2018	25
End Date	02/13/2025	25
Documentation	Electronic Signature	▼

e-Sign document - Completed X

ADD RECORD CANCEL

A red arrow points to the ADD RECORD button.

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

**PRIVACY**

**Client Privacy**

Public
Private

SAVE CHANGES
CANCEL

**RELEASE OF INFORMATION**
ADD RELEASE OF INFORMATION +

Permission	Type	Start Date	End Date	↓
Yes Sarah Agency	Electronic Signature	02/13/2018	02/13/2025	

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 Release

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

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	02/13/2018	25
End Date	02/13/2025	25
Documentation	Attached PDF	▼
File		

ADD RECORD    CANCEL

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."

**RELEASE OF INFORMATION**

<b>Permission</b>	Yes	▼
<b>Start Date</b>	02/13/2018	📅 25
<b>End Date</b>	02/13/2025	📅 25
<b>Documentation</b>	Attached PDF	▼
<b>File</b>	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"><b>Select File</b></div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; display: inline-block;">Client-Consent-to-Data-Collection-ROI.pdf (102.18KB) - Completed <span style="float: right;">✕</span></div>	

➔

**ADD RECORD**

CANCEL

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

**PRIVACY**

Client Privacy      Public    Private

**RELEASE OF INFORMATION** ADD RELEASE OF INFORMATION (+)

Permission	Type	Start Date	End Date	
Yes Sarah Agency	Attached PDF	02/13/2018	02/13/2025	

### Declined/Refused Consent

Households that refuse consent will have their identifying information held by CEA 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 de-identifying a profile, replace the first name field that reads “Consent” with the Unique Identifier generated by HMIS. Leave the last name as ‘Refused.’

Instructions on how to create a de-identified profile in HMIS can be found in the Complete Seattle: King County HMIS End User Training Manual found at <http://kingcounty.hmis.cc/wp-content/uploads/2015/09/King-County-End-User-Training-Manual.pdf> on page 6. Once the profile has been created and the triage tool has been entered into HMIS, the Housing Assessor needs to send the identifying information to the CEA team.

If a client 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.

The screenshot shows a web form titled "RELEASE OF INFORMATION". At the top, there is a dark blue header with the title in white. Below the header, the form has a white background. On the left, the label "Permission" is followed by a dropdown menu currently displaying "No". Below the dropdown, there are two buttons: "ADD RECORD" and "CANCEL". The "ADD RECORD" button is highlighted with a red rectangular border, and a red arrow points to it from the left.

There are two ways to send non-consenting information to CEA:

1. Non-consenting participant information should be sent by **Fax to (206) 205-6565, Attn: CEA Referral Specialists**. Print off the profile page from HMIS that has the Head of Household’s unique identifier number listed. At the bottom of the page, list the name, date of birth, gender, and contact information for each household member. If it is a family, please list all the family members on one page so the CEA team knows that are a family unit.
2. You can also send a **secured** email to [cea@kingcounty.gov](mailto:cea@kingcounty.gov) 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. Complete CEA Triage Tool**

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. This includes each field of the VI-SPDAT, all supplemental questions, and flag review notes if applicable. If the client is de-identified, identifying information **MUST** be sent to CEA within the same timeframe See.

#### **Selecting a Housing Triage Tool**

The population specific version of the VI-SPDAT tool are:

- **F-SPDAT:**

The F-SPDAT should be completed when assessing a woman of any age who is pregnant or a household that has at least one child under the age of 18. One triage tool is completed for the entire family unit.

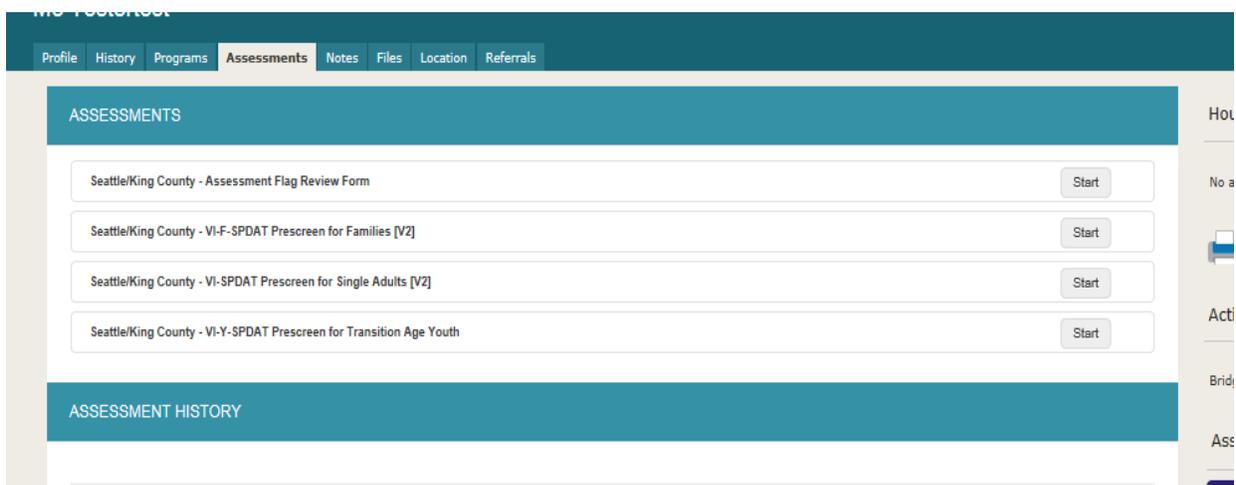
- **TAY-SPDAT:**  
The TAY-SPDAT should be completed with someone who is between 17.5-23.5 years old.
- **VI-SPDAT:**  
The VI-SPDAT should be completed with a single adult who is 24 years of age or older

Which triage tool to use for unique situations:

- ❖ A young adult (17.5-23.5) who is pregnant- complete a F-SPDAT
- ❖ Two adults over 25 that want to live together- compete a VI-SPDAT for each single adult
- ❖ A family that consists of HOH, grandma, and 2 twins age 7- F-SPDAT for the entire family
- ❖ A family with HOH and one child 19 year old but is still in high school- complete two VI-SPDATS, one for dad and one for adult child

### Entering the triage information into HMIS

Click the assessment tab in the client's profile. Next, you will select the appropriate version of the VI-SPDAT by clicking the start button to the right of that 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 VI-SPDAT including the information of the 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, the only agency that will see the information is the one associated with the assessor. CEA will not be able to see any information and the household will never be able to be referred to a housing resource.

The screenshot shows a web form titled "Housing Triage Tool Administration". The form contains several fields: "Housing Triage Tool Date" with a date picker set to 08/24/2017; "Assessor First Name" with a text box containing "e"; "Assessor Last Name" with a text box containing "b"; "Housing Triage Tool Location" with a text box containing "a"; and "Was this Housing Triage Tool completed by RAP staff?" with a dropdown menu set to "No". Below these fields is a "Date of Update" field with a date picker. At the bottom of the form, there is a confirmation statement: "I confirm that this client's consent status (Release of Information) has been documented in HMIS under their privacy shield. -please enter initials here" followed by a text box containing "eb". At the very bottom of the form, there are "Save" and "Cancel" buttons. The footer of the page reads "Managed with Clarity Human Services".

### **Step 5. Referring the assessment to the community queue**

For all households that score a **four or more on the tool**, you will need to refer the household to the Community Queue. This is the pool of households that are eligible for CEA resources and waiting to be referred to housing.

1. After saving the triage tool you will be taken to this page. You will need to scroll to the bottom of the screen and click the black box that says **“Refer to the Community Queue”** (see image below)

Above the Refer to the Community Queue button, you will see a list of programs that the household is eligible for. If you click on the drop downs, it will let you refer households to these programs. **(IGNORE THIS SECTION. NEVER REFER A HOUSEHOLD TO A RESOURCE. IF YOU MAKE A REFERRAL TO A PROGRAM, YOU WILL LOSE YOUR ASSESSOR ACCESS)**

The screenshot shows a software interface with a navigation bar at the top containing 'Profile', 'History', 'Programs', 'Assessments', 'Notes', 'Files', 'Location', and 'Referrals'. Below this is a section titled 'PROGRAM ELIGIBILITY DETERMINATION'. It contains a table with the following data:

VI-SPDAT-V2 Score Summary		GENERAL INFORMATION		
HISTORY OF HOUSING & HOMELESSNESS	2	SOCIALIZATION & DAILY FUNCTION	2	
RISKS	3	WELLNESS	4	
VI-SPDAT-V2 PRE-SCREEN TOTAL			11	

Below the table is a search filter section with two dropdown menus: 'Category' (set to '-- All Categories --') and 'Agency' (set to '-- All Agencies --'). A 'Search' button is located to the right of these dropdowns.

This screenshot shows the bottom section of the software interface. It features two prominent buttons: 'Refer directly to Community Queue' on the left and 'Cancel' on the right. Below these buttons, the text 'Managed with Clarity Human Services' is visible.

After clicking “Refer Directly to the Community Queue”, you will be taken here.

The screenshot shows a web application interface for adding a referral. At the top, there is a navigation bar with tabs for Profile, History, Programs, Assessments, Notes, Files, Location, and Referrals. The 'Referrals' tab is active. Below the navigation bar is a teal header with the text 'REFERRAL: ADD'. The main form area contains several input fields: 'Referred Program' with the value 'Community Queue', 'Referred to Agency' with the value 'Community Queue', 'Referring Agency' with the value 'King County', and a 'Private' checkbox. Below these fields is a large text area for adding a referral note, which includes a rich text editor toolbar with options for Bold, Italic, Numbers, and Bullets. At the bottom of the form, there are two buttons: 'Send Referral' and 'Cancel'.

This is where you can add a referral note. Your note would include information that would help the CEA Referral Team make appropriate referrals, geographic preference, needs ADA unit, etc.). After including a note if needed, click “Send Referral” at the bottom of the page. The household has now been added to the community queue.

#### **Step 6. Enter Contact Information in the Location Tab**

Housing Referrals from CEA 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 CEA can reach households.

Housing Assessor should include as many forms of contact information as possible. This information should be entered into two places in HMIS.

1. Contact information in the triage tool
2. In the location tab in HMIS (see instructions below)

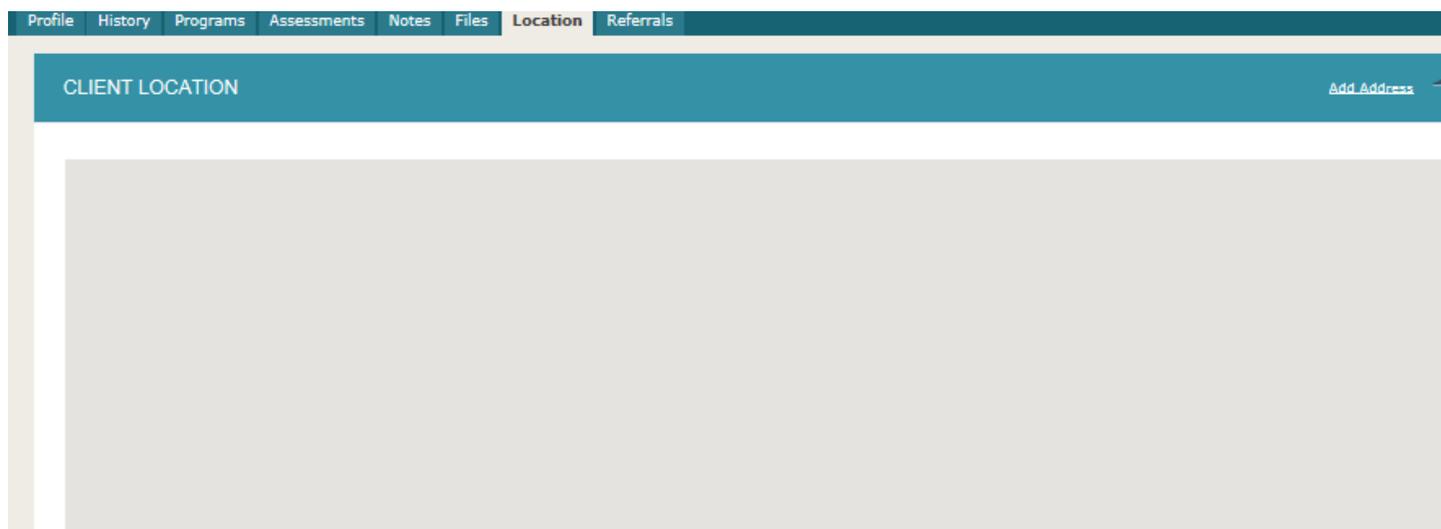
Examples of contact information that should be collected are:

- ❖ 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

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 CEA team making appropriate referrals. If the household is de-identified, do not add information that can easily identify the household such as nickname, family member's name, etc.

### How to add contact information to the Location Tab in HMIS

Click on the "Location" tab in the client file. Click "Add Address".



Complete contact information and click “Add Record”.

The screenshot shows a web application interface for entering client location information. At the top, there is a navigation bar with tabs for Profile, History, Programs, Assessments, Notes, Files, Location (selected), and Referrals. Below this is a header for 'CLIENT LOCATION'. The form contains the following fields:

- Address Type: Home (dropdown menu)
- Name: [text input]
- Address (line 1): [text input]
- Address (line 2): [text input]
- City: [text input]
- State: WA - Washington (dropdown menu)
- Zip Code: [text input]
- Email: [text input]
- Phone (#1): [text input]
- Phone (#2): [text input]
- Status:
- Private:

At the bottom right of the form, there are two buttons: 'Add record' and 'Cancel'.

You will be notified at the top of the screen that your record has been saved.

### 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<sup>5</sup>
- ❖ By calling CEA general information line at (206) 328-5796. **Note:** Due to the volume of calls, if there is a request for a return call from CEA, it may take 5-10 business days.

Housing Assessors should also inform households that CEA does not operate with a conventional waitlist. The pool of households seeking housing changes every day with new intakes and households’ situations changing. The list of available housing resources also

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<sup>5</sup> 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/coordinated-entry/access-points.aspx>

changes daily as units are filled and housing programs release new resources. CEA works to prioritize the most vulnerable households first.

### **Closing Script**

The Housing Assessor should help the client 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 client(s).

The CEA Process flow is outlined in Appendix IV

The CEA Tips and Resource Guide for Consumers is outlined in Appendix V

The CEA Messaging-Closing Script for Housing Triage Tool Appendix VI

CEA 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 client with the following responsibilities:

- Assisting client in obtaining necessary documentation required for housing
- Assisting clients 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 client 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

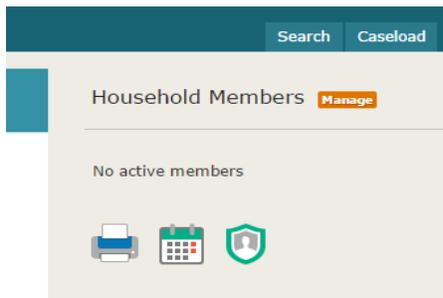
- The receipt of a disability check (e.g., SSI/SSDI check or Veteran Disability Compensation)
- Intake staff-recorded observation of disability that, no later than 45 days from the application for assistance, is confirmed and accompanied by evidence described under bullets 1, 2, or 3
- Other documentation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

**Documenting Homeless History:**

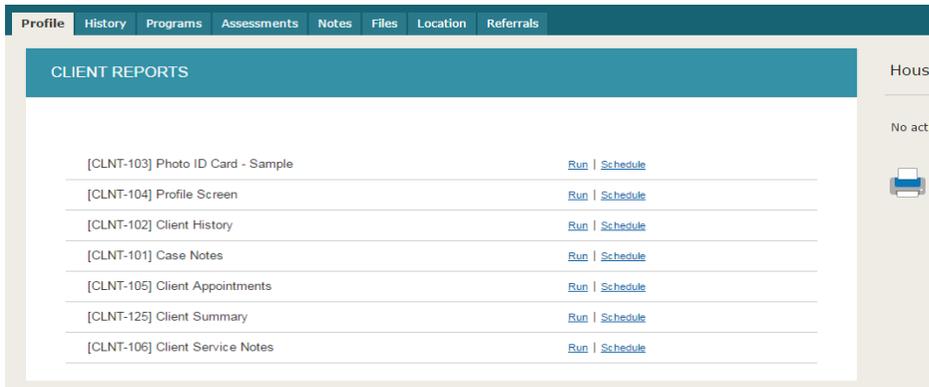
- An individual is chronically homeless if homeless for 12 consecutive months+, or 4+ occasions totaling 12 months over 3 years. Each individual occasionally needs to be fully documented, and the breaks can be by self-report.
- A Single encounter in a month is sufficient to consider a household homeless 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.

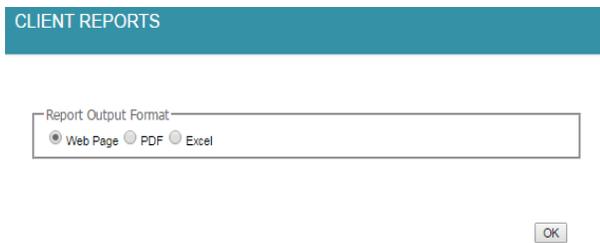
Go into the client’s profile page. Click the Printer icon under the Household Member section to pull up Report options.



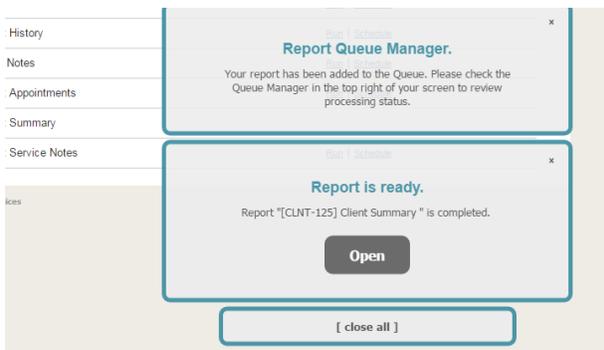
Click Run Client Summary report



It will default to 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

<b>Name:</b>	<b>Unique Identifier:</b>
<b>SSN: XXX-XX-</b>	<b>Date of Birth:</b>
<b>Quality of SSN: Full SSN Reported</b>	<b>Quality of Date of Birth: Full DOB Reported</b>

General Information	
Age:	
Gender:	Female
<b>Veteran Status:</b>	<b>Yes</b>
VA verified or self-reported:	Unknown
VA Eligibility:	Not Applicable
Current Monthly Income:	Not Applicable
Current Chronic Homeless Status:	NOT Chronic Homeless
Prior Chronic Homeless Status:	No
First time entered into HMIS:	01/16/2017
First type of program enrolled in:	No Program History
Current Mental Health problem:	Unknown
Ever identified as having a Mental Health problem:	No
Current Developmental Disability:	Unknown
Ever identified as having a Developmental disability:	No
Current Physical Disability:	Unknown
Ever Identified as having a Physical disability:	No
Current Substance Abuse Problem:	Unknown
Ever identified as having a Substance Abuse problem:	No
Current Chronic Health Condition:	Unknown
Ever identified as having a Chronic Health issue:	No
Current Victim of Domestic Violence:	Unknown
Ever identified as being a victim of Domestic Violence:	No
Currently identified as part of a household:	No

## Flag Review Process

The Flag Review Panel, made up of CEA Referral Specialists will periodically review cases for households with high vulnerability (defined below) who are unable or unwilling to complete a Housing Triage Tool that were flagged by a Housing Assessor as not capturing the needs or vulnerability of a household.

The purpose of convening as a review panel is to provide a safety net for individuals where the tool does not reflect an accurate vulnerability score, and is not to be utilized as a side door to the process.

Housing Assessors will have to demonstrate professional judgment in this process. Those that repeatedly refer a large percentage of individuals to the review panel may be subject to additional training and/or other measures. A review panel will be used to allow for some element of individual attention and conversation in this process, but at the same time still maintain a uniform, transparent process.

1. A Housing Assessor notes in Clarity that a Score Review is needed. If the situation is already captured in the assessment, do not flag. As an example, if the assessment already reflects a medical condition, flagging is not going to change the vulnerability score. When flagging situations that are not captured in the assessment, households need to meet one of the following criteria:
  - A. A severe medical condition is present that meets one of the following criteria:
    1. Requires a medical device that is used to cure or treat disease that needs electricity to operate.
    2. Medical treatment that requires portable oxygen
    3. Terminal illness
    4. History of Frostbite, Hypothermia, or Immersion Foot
    5. A member of the household is receiving treatment for a life threatening condition
    6. A life threatening medical event has occurred in the last 30 days
  - B. A severe behavioral health condition that presents barriers to daily functioning and housing that were not captured in the assessment.
  - C. Evidence of self-neglect. Observation by the Housing Assessor/case manager/outreach worker is sufficient to meet this condition.
  - D. Old age. The individual is 80 years of age or older.
  - E. Deaf and/or blind (this can be captured in the notes section)
2. Housing Assessors must provide the following information.
  - A. Which VI-SPDAT question/s need review because the current answer does not reflect their knowledge of the household's circumstances or history , and
  - B. Provide the information, and documentation, that proves the need for a changed response to the question.

**NOTE: If there is no information provided by the Housing Assessor relevant to why a household's assessment and VI-SPDAT questions should be reviewed then the case will not be discussed.**
3. The only guarantee related to the review panel process is that the individual will receive a review. Not all cases will result in a VI-SPDAT score change. In some instances, the review panel may determine that the initial score and position on the community queue is correct. In other situations, the flag review panel may determine that a higher score is warranted. The review panel may also contact the assessor for clarification or additional information.

# Housing Triage Tool Disability Accommodation

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A housing assessment disability accommodation is an adjustment to the process that allows a person with a disability to complete the CEA housing assessment process, be referred to the CEA Community Queue, and then receive a housing referral based on prioritization.

1. A Housing Assessor must make at least three in-person attempts to complete the Homeless Management Information System (HMIS) Client Consent form and the CEA Housing Triage Tool following the usual protocol.
2. Once it is determined that as a result of their disability the household will not be able to complete the HMIS Client Consent Form and/or the CEA Housing Triage Tool, then the Housing Assessor should follow the consent refused procedure to enter the household into Clarity. This procedure is outlined in the CEA Housing Assessor Manual and the King County HMIS User Manual.
3. The Housing Assessment Disability Accommodation Form must be completed and uploaded into Clarity into the client's profile under the "files" tab.

A Housing Assessor must start to complete the Housing Triage Tool in Clarity. They are required to complete the household's demographics (DOB, age of children, etc.), the administrative section, initial/acknowledge that the HMIS Consent Form has been completed, and flag the assessment for review.

4. Housing Assessors must then provide the following information in the flag review section.
  - a. Which VI-SPDAT question/s need review because the current answer does not reflect their knowledge of the household's circumstances or history , and
  - b. Detailed yet concise information that proves the need for a changed response to the question.

Note: If a document is uploaded as part of proving need, the Housing Assessor must still provide detailed responses as outlined above.

**NOTE: If there is no information provided by the Housing Assessor relevant to why a household's assessment and VI-SPDAT questions should be reviewed then the case will not be discussed.**

# HMIS Data Input Responsibilities

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All Housing Assessors are required to be HMIS users and must complete the **Clarity General Training** before they will be granted access to the system. Clarity General Training is offered via live webinar once each week and are located at <http://kingcounty.hmis.cc/training/schedule-a-training/>

Housing Assessors must complete the Housing Triage Tool in HMIS within 48 hours of when the information was first collected, whether the assessment is first conducted on paper or directly inputted within HMIS. If the household is de-identified, identifying information **MUST** be sent to CEA either through **secure** email at [cea@kingcounty.gov](mailto:cea@kingcounty.gov) or by fax to 206.205.6565.

This includes each field of the VI-SPDAT, all supplemental questions, and flag review notes if applicable.

There is a HMIS Coordinated Entry Toolkit accessible at <http://kingcounty.hmis.cc/coordinated-entry-toolkit/>

[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 can be found on the HMIS website <http://kingcounty.hmis.cc/>](#)

# Glossary of Terms

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

**CEA 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.

**Community Queue** – the pool of eligible households for resources in CEA.

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

**Eligible Household** - CEA 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

**F-SPDAT (Family Service Prioritization Decision Assistance Tool)** – A tool developed and owned by OrgCode is utilized for pregnant or parenting households to recommend the level of housing supports necessary to resolve the presenting crisis of homelessness. Within those recommended housing interventions, the F-SPDAT allows for prioritization based on presence of vulnerability.

**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 for All.

**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. The Housing Navigator role may alternatively be filled by an outreach worker or case manager.

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

**Path to Home**- Path to Home (also referred to as diversion) is a service that diverts individuals and households from the homeless housing system and CEA. Path to Home can provide certain types of services that can assist in resolving a homeless housing crisis much sooner than waiting for a CEA resource. Path to Home solutions may temporary or permanent, but must come to fruition within 30-days and last a minimum of 90-day. For detailed information on Path to Home go to the CEA website at <http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx> and look under Manuals.

**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 Path to Home / Diversion, connections and referrals to an array of services and resources, and in cases of higher vulnerability, will complete a triage tool with a referral to the CEA Community Queue. RAPs are located in five sites across King County. Housing assessors and navigators are based at these sites.

**TAY-VI-SPDAT (Transition-Aged Youth Vulnerability Index- Service Prioritization Decision Assistance Tool)** – An assessment tool developed and owned by OrgCode and Community Solutions that is utilized for single young adults between 17.5-23.5, to recommend the level of housing supports necessary to resolve the presenting crisis of homelessness. Within those recommended housing interventions, the TAY-VI-SPDAT allows for prioritization based on presence of vulnerability.

**VI-SPDAT (Vulnerability Index- Service Prioritization Decision Assistance Tool)** – An assessment tool developed and owned by OrgCode and Community Solutions that is utilized for single individuals, including veterans, to recommend the level of housing supports necessary to resolve the presenting crisis of homelessness. Within those recommended housing interventions, the VI-SPDAT allows for prioritization based on presence of vulnerability.

**YA (Young Adult)** – An individual who is 17.5-23.5 years old. There are programs targeted to serve individuals in this age range. Young adults may also be eligible for single adult programs.

# Appendices

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## Messaging

HMIS Client Information Sheet

CEA Process/Flow

CEA Tips and Resource Guide

CEA Frequently Asked Questions

CEA Assessor Training Materials

## 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 30 minutes to complete. This Housing Triage Tool will help me determine if you are eligible for homeless housing resources through Coordinated Entry for All. This Housing Triage Tool is not used to screen you out of a housing resource, rather it is used to help figure out what you are eligible for.*

*Most questions only require a "yes" or "no." Some questions require a one-word answer. You do not need to provide any additional details or information if you are not comfortable. Simply answering yes or no is okay. You may refuse to answer or skip any question. If you do not understand a question I can give you clarification, feel free to stop me and ask a question at any time. There are no 'right' or 'wrong' answers, so please be as honest as you can.*

*The information collected goes into a secure database, the Homeless Management Information System (HMIS) which will ensure that instead of going to agencies all over town to get connected to housing resources, you will only have to fill out this paperwork one time.*

*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 in CEA. 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.*

## 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’s 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 CEA ARE VERY LIMITED AND THAT A HOUSING SOLUTION THROUGH CEA IS NOT GUARENTEED OR QUICK. After completing the assessment, if the score is low, again explain that a housing resource through CEA is unlikely and return to digging deeper into the diversion conversation.

## Appendix III HMIS Client Information Sheet



401 Fifth Avenue  
Seattle, WA 98104



548 Market St #60866  
San Francisco, CA 94104  
(206) 444-4001

### 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.

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

#### **Who has access to your information?**

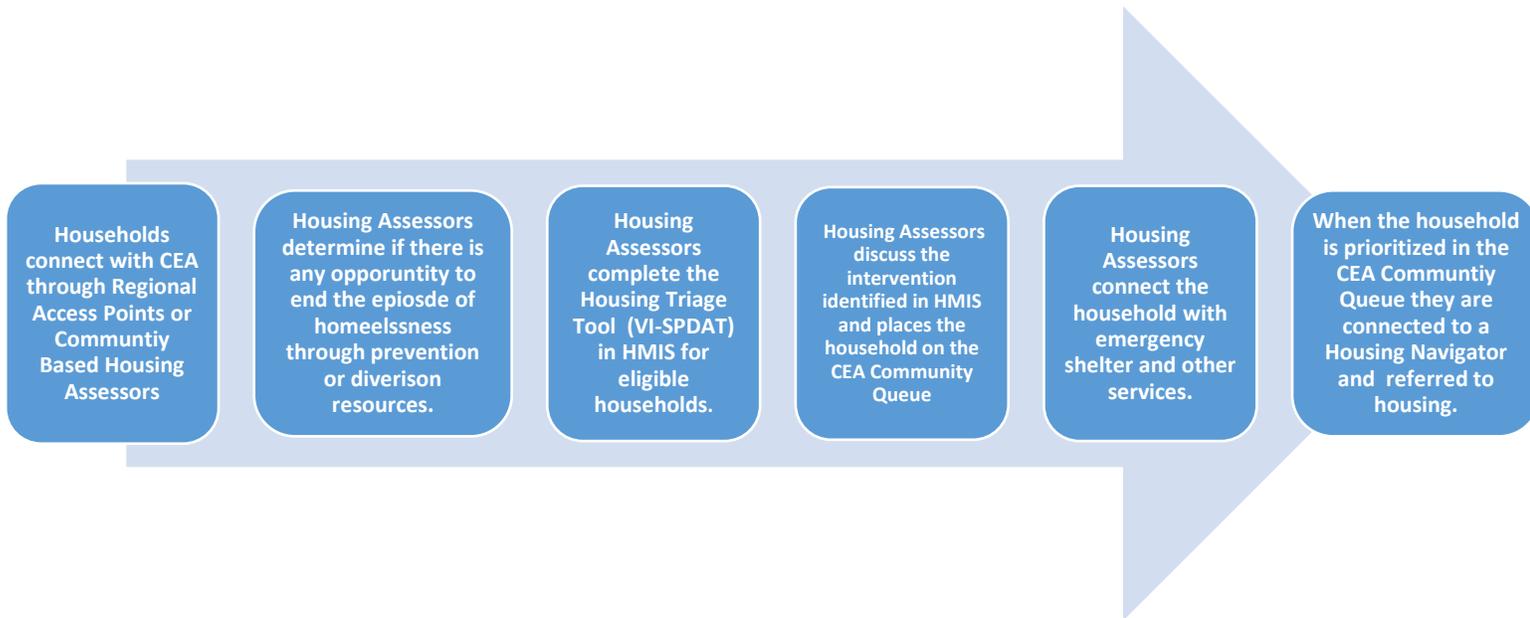
My HMIS information may be shared by the Partner Agencies to coordinate referral and placement for housing and services such as counseling, food, utility assistance, and other services. Report developers and HMIS staff may also see your data. There are strict legal guidelines for who has access to your 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 my 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@clarityhs.com](mailto:kcsupport@clarityhs.com)

## Appendix IV CEA Process Flow



**Step 1: Connecting to Coordinated Entry for All** - To ensure accessibility for eligible households, CEA 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 or by calling 211. 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 (Path to Home) 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: Refer to the CEA Community Queue** – Once the household has completed the Housing Triage Tool, the Housing Assessor discusses the intervention identified in HMIS and as appropriate places the household on the CEA Community Queue.

**Step 5: 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 6: Housing Referral** – Households are referred based on the prioritization policy adopted by the Seattle / King County CoC. Information gathered from the Housing Triage Tool is used to create a vulnerability score which contributes to prioritization for available resources. Households not recommended for housing resources based on the results of the Housing Triage Tool will be offered other services, such as diversion, short-term/emergency housing, or referral to other community supports. Households not interested in the programs identified through the Housing Triage Tool as the appropriate level of support for them may also be offered other resources.

#### Low Barrier Policy

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CEA 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**  
**CEA Tips and Resource Guide for Consumers**



**Coordinated Entry for All (CEA) – Tips & Resources Guide**

CEA: (206) 328-5796 | CCS RAP: (206) 328-5900

**Frequently Asked Questions about Coordinated Entry for All (CEA)**

**I have completed a CEA 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. The number of people and families experiencing homelessness changes every day. The list of available resources also changes every day. There is no way for us to know how much time it will take to match you with the right housing, and a housing resource is not a guarantee.

**What happens after I complete the triage tool?**

You now have an active housing triage tool for CEA. CEA staff will contact you when you are the next eligible household for housing. They will try to reach you using all the contact information you gave us today. Once contacted, please make sure you respond as quickly as you can. CEA will not contact households with updates until a housing resource becomes available.

**When should I call the CEA information line?**

You can call CEA at (206) 328-5796 when you need to update your contact information or if anything you mentioned in your triage tool has changed. Note: Due to the volume of calls, it will take 5-10 business days for CEA staff to respond to message left on the information line. 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?**

To update your contact information or any other information related to your housing assessment, please call or any of the Regional Access Point (RAP) sites, or the CEA Information Line at (206) 328-5796.

*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.)
- ✓ Change in payment plan to an old landlord or debt collector
- ✓ Criminal background or warrant

### **Next Steps**

When you are called for a housing resource, the housing program may ask you to turn in these items. Please start working on getting these documents if you do not have them:

### **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](http://www.annualcreditreport.com)
- Start a payment plan with a Housing Authority:
  - *King County Housing Authority:* [www.kcha.org](http://www.kcha.org)
  - *Seattle Housing Authority:* [www.seattlehousing.org](http://www.seattlehousing.org)

#### **Criminal Background & Warrant Status:**

- *Washington State Courts:* [www.courts.wa.gov](http://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](http://www.washingtonlawhelp.org)

#### **Social Security card:**

- [www.ssa.gov/forms](http://www.ssa.gov/forms)

#### **Birth Certificates:**

- [www.usa.gov/replace-vital-documents](http://www.usa.gov/replace-vital-documents)

### **Employment Navigation**

If you are not working, it is a chance to get work. If you are currently working, this is a chance to look for another job or reduce any barriers that may get in the way of working.

- 1) When you are ready, the assessor will give your name and contact information to an employment navigator.
- 2) The Employment Navigator will try to contact you within 2 days to help you with your employment goals.

Possible things to work on with an Employment Navigator:

- Talk to you about your work history, and your strengths and barriers
- Create a plan for your employment goals
- Connection to employment openings through WorkSource or other employment services
- Help with interviewing or making a resume
- Refer you to job openings or job fairs

Information about services such as childcare, access to transportation, or work clothes

## **Appendix VI**

### **Messaging –Closing Script for Housing Triage Tool**

Example of closing script (if referred to the Community Queue):

Thank you [client name] for completing the CEA Housing Triage Tool with me today. As I explained, based on your score I have referred you to the Community Queue. The Community Queue is not a waitlist and when a resource becomes available that you're eligible for, a CEA Referral Specialist will contact you. It's very important that you return the Referral Specialist's call immediately as they can't hold resources and will need to move on and offer the resource to the next eligible person/household if they don't hear back. Because the Community Queue doesn't operate like a waitlist, there is no way to tell when a housing resource will become available. It's all dependent on what resources open up and your eligibility for available housing resources. I also want to be very honest and transparent with you. The amount of housing connected to CEA is extremely limited with few resources becoming available each month and is inadequate to meet the needs of our community. The chances of an opening in CEA is low, so I'll mention again that if you can think of a plan outside of CEA 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 CEA Tips and Resource Guide for Consumers that I just gave you.

## **Appendix VII CEA Frequently Asked Question**

### **1. What is Coordinated Entry for All (CEA)?**

CEA ensures that people experiencing homelessness can get help finding stable housing by identifying, assessing, and connecting them to housing support services and housing resources. CEA uses a standardized housing triage tool that matches the right level of services and housing resources to people experiencing homelessness. CEA does not create more available housing. It matches eligible people to the current limited resources.

### **2. How does CEA work?**

CEA uses a housing triage tool, called the VI-SPDAT, to gather information about the needs of each homeless family or homeless individual. In general, the triage tool asks a series of questions about the household or individual, your health, how you are experiencing homelessness, and what other needs you might have.

### **3. Who does CEA serve?**

CEA serves all populations (single adults, young adults\*, couples, families, and Veterans) who are experiencing literal homelessness and are residing in King County. Additionally, young adults\* who are at risk of homelessness within 14 days can also receive CEA services.

Being homeless means you are:

- 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 17.5 years old through 23.5 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 CEA.

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

#### **4. How can I get connected to CEA?**

You can get connected to CEA by calling 211 or come to one of our Regional Access Point offices. The address for these offices are listed in Question 6.

#### **5. I do not meet any of the conditions described in Question 3, where can I go for help?**

CEA 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.

#### **6. Where are the Regional Access Point offices located?**

There are 5 Regional Access Point offices located throughout King County. They are listed below.

##### **Seattle Office**

##### **Catholic Community Services**

Address: 100 23rd Avenue South, Seattle, WA 98144

Phone: 206-323-6336

Hours of operation: Monday – Friday 9am – 5pm

Evening/weekend hours by appointment

Walk-in hours: Current available walk-in hours are listed on the CEA Website at [www.kingcounty.gov/CEA](http://www.kingcounty.gov/CEA)

##### **South King County in Federal Way Office**

##### **Multi-Service Center- Federal Way**

Address: 1200 South 336th Street, Federal Way, WA 98003

Phone: (253) 838-6810

Hours of operation: Monday –Friday 9 am-5 pm.  
Evenings/weekends by appointment.  
Walk-in Hours: Current available walk-in hours are listed on the CEA Website at [www.kingcounty.gov/CEA](http://www.kingcounty.gov/CEA)

**South King County - Renton Office**

**YWCA- Renton**

Address: 1010 South 2nd Street, Renton, WA 98057  
Phone: (425) 264-1400

Monday –Friday 9 am-5 pm. Saturday hours by appointment only.  
Walk-in Hours: Current available walk-in hours are listed on the CEA Website at [www.kingcounty.gov/CEA](http://www.kingcounty.gov/CEA)

**North King County Office**

**Opportunity Center for Employment and Education**

Address: 9600 College Way North, Seattle, WA 98103  
Phone: 206-753-4890

Hours of operation: Monday – Friday 9am – 5pm.  
Evenings/weekends by appointment.  
Walk-in Hours: Current available walk-in hours are listed on the CEA Website at [www.kingcounty.gov/CEA](http://www.kingcounty.gov/CEA)

**East King County Office**

**Catholic Community Services - Bellevue**

Address: 11061 NE 2nd Street, Bellevue, WA 98004  
(Note: The office is in the First Congregational Church building.)  
Phone: (206) 323-6336

Hours of operation: Monday: 9am - 7pm; Tuesday, Wednesday, and Thursday: 8:30am - 6pm.  
Walk-in Hours: Current available walk-in hours are listed on the CEA Website at [www.kingcounty.gov/CEA](http://www.kingcounty.gov/CEA)

**7. What happens when I call 211?**

When you call 211, let the person answering your call know that you are experiencing homelessness and would like to make an appointment to be evaluated for a CEA Housing resource. When you meet with a staff member at a Regional Access Point, they may begin the conversation with problem solving your current situation before completing a CEA Housing Triage Tool. The Triage Tool can still be completed for anyone experiencing homelessness, but resources are limited and there is no guarantee you will be eligible for a resource, or that a resource will be available.

If you are a homeless youth or young adult, there are additional locations you can access a resources or complete a CEA Housing Triage Tool. Additional locations for youth and young adults can be found at <http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/access-points.aspx>

**8. 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 211, 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.

**9. 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.

**10. 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 211, please let the person answering your phone call know about your work or school schedule.

**11. What if I am currently in a jail or a prison, can CEA 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 CEA can help.

If you are a young adult (17.5 through 23.5 years old), CEA 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 the jail or prison 90 days or less.

**12. I have completed a CEA 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. The number of homeless people and families needing housing change every day. The number and types of available housing resources also change every day. There is no way for us to know how much time it takes to match you with the right housing, and there is no guarantee that a resource will become available.

**13. I have completed the CEA 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 the CEA Information Line at 206-328-5796. Note: Due to the volume of calls it will take CEA staff approximately 5-10 business days to follow-up on any messages left.

**14. I have a concern about CEA policies and procedures, who do I talk to?**

If you have a concern about CEA policies and procedures, you may leave a message at 206-328-5796 or email [cea@kingcounty.gov](mailto:cea@kingcounty.gov).

**Appendix VIII**  
**CEA 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 T3 trainers to use when training new Assessors. Each step must be completed in order to have access to HMIS and complete CEA 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 CEA Overview webinar** - This is an overview of CEA system and processes located at <http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx>

Date Completed: \_\_\_\_\_

**Step 2**

**Participate in the Clarity General Training webinar**- this live webinar is required to get a Clarity log in

Follow this link to register for an upcoming webinar <http://kingcounty.hmis.cc/training/schedule-a-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 user name and password for the new assessor.

Date completed: \_\_\_\_\_

### Step 3

**In-person training with a certified CEA trainer** (see training checklist below)

Date completed: \_\_\_\_\_

### Step 4

**Refresher training**- all assessors are required to do an in-person refresher training 1 month after they begin administering the CEA Housing Triage Tool. This training will be hosted by a member of the CEA team.

Refresher trainings are scheduled to occur monthly. All Refresher trainings are one-hour in length and are located at 401 5<sup>th</sup> Ave, Seattle, King County Chinook Building.

Refresher Training times and room locations for 2018 are as follows:

1/22 Room 126 1:00 PM

2/15 Room 124 10:00 AM

3/15 Room 124 10:00 AM

4/23 Room 126 1:30 PM

5/17 Room 124 10:00 AM

6/18 Room 126 2:00 PM

7/19 Room 126 1:30 PM

8/20 Room 126 10:00 AM

9/20 Room 126 2:00 PM

10/18 Room 126 2:00 PM

11/22 Room 126 10:00 AM

12/20 Room 126 2:00 PM

Date completed: \_\_\_\_\_

I certify that all training requirements have been completed:

Trainer Name: \_\_\_\_\_

New Assessor Name: \_\_\_\_\_

Trainer Signature: \_\_\_\_\_

New Assessor Signature: \_\_\_\_\_

Today's Date: \_\_\_\_\_



### CEA HOUSING ASSESSOR QUIZ

Name: \_\_\_\_\_

Agency: \_\_\_\_\_

Date: \_\_\_\_\_

1. Can I change the questions on the triage tool to clarify more information? Yes/No
2. When should households scoring 0-3 on the triage tool be referred to the Community Queue?
  - A. Households scoring 0-3 should always be referred to the queue.
  - B. Households scoring 0-3 should never be referred to the queue.
  - C. Households scoring 0-3 should only be referred to the queue when they are flagged for specific reasons.
3. What box should an Assessor never check anywhere in HMIS?
  - A. Have you ever been in foster care?
  - B. Where do you sleep most frequently?
  - C. The "Private" box.
4. What happens after someone is referred to the Community Queue?
  - A. They receive a call from a CEA Referral Specialist and told they are now on a wait list for a housing unit.
  - B. They begin receiving calls from CEA with housing updates.
  - C. They are put in the housing pool and when a housing match that meets their eligibility comes up in the queue, they receive a call from a CEA Referral Specialist to inform them of a housing opportunity.
5. If the household being triaged identifies as a Veteran, what additional document would you direct the new assessor to upload into HMIS?
  - A. A signed statement from the household declaring they served in the U.S. military.
  - B. A letter from the Veterans Administration proving they served in the U.S. military.
  - C. A Veterans Administration Release of Information.

6. Households are prioritized in the Community Queue by which method.
  - A. How long they've resided in King County.
  - B. How well they self-advocate.
  - C. By vulnerability.
7. Which is an appropriate example of when to flag a triage tool?
  - A. When the client specifies they'd like to live in a certain area of the County.
  - B. When the assessment questions do not catch the true and verifiable vulnerability of the client.
  - C. When the assessor knows for certain there is a disparity in what the client reported, and what they know as fact, and that the score of the assessment would be significantly impacted with an accurate report.
  - D. Both B and C.
8. Which example is best when writing a flag note?
  - A. Write brief description of the situation.
  - B. Cite each question not congruent with the situation including specific reasons/examples of why the answers are not reflective of the clients' situation and that would significantly impact a score or vulnerability not captured in the assessment.
  - C. Indicate where CEA can reach the client for more information.
9. Which is the most accurate description of Path to Home/Diversion?
  - A. It's available to people living in a shelter with no other place to go.
  - B. It can be used for people that are unsheltered or living in a shelter that have a housing plan that can be executed within 30-days, and with a housing outcome lasting at least 90-days.
  - C. It can be used for homeless prevention, keeping people from entering into homelessness.
10. What is the best response when someone being triaged asks where they will be on a wait list?
  - A. I don't know, you can call me once a month to check.
  - B. The Community Queue is not a waitlist, but more like a pool of applicants. When a housing resource comes available, the household that matches the eligibility for the resource is called by a referral specialist at CEA. Because resources are so limited it could take weeks, months, or much longer for a resource to open.
  - C. You will get housing as soon as something opens.