

**Coordinated Entry for All
CE Liaison and Approved
Trainer (T-3)
User Manual Version 4**

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Vision

Providing clients equitable access to the coordinated entry system, and therefore access to limited housing resources in our community, depends on a robust coordinated entry assessment process. To accomplish this goal, high quality training and oversight of the Housing Assessment staff is required.

Coordinated Entry for All (CEA) has deployed the following methodology. This is to ensure a uniform method of training of Housing Assessors throughout the King County homeless response system. The parties involved include the agencies themselves where Housing Assessors are situated, and the CEA training staff. Specific agency roles include CEA Liaison(s), T-3 (Train the Trainer) trainers and Housing Assessors.

CEA has evolved this training process overtime to adapt to the needs of the community, increase efficiencies and improve lines of communication between CEA and the participating agencies. Changes we have incorporated:

- ❖ Allowing for Zoom meetings for Assessor Refresh to allow for greater flexibility
- ❖ Greater Accountability and HUD compliance for Training
- ❖ Incorporate the T-3 to the Quarterly HMIS Agency Leads meetings

CEA Assessor Liaison

The CEA Assessor Liaison role is fundamentally for the communication between CEA and the partner agency. This person designates the T-3 trainers, ensures on-site training is completed as designated in the CE assessor manual, and monitors and responds to CE assessor related data quality issues. The CEA Assessor Liaison can also hold other roles, such as T-3 trainer or HMIS Agency Lead.

CEA Liaison staff's role is specifically designed to:

- ❖ Communicate to CEA when there are new staff who have completed their training and need access to the Coordinated Entry System Agency - All T3 trainers will submit new training paperwork to the Liaison to submit to CEA to approve new users
- ❖ Oversee and coordinate CEA related activities at your agency
- ❖ Work closely with the HMIS Agency Lead to manage user accounts in regard to additional agency access to Coordinated Entry System Agency
- ❖ Provide leadership and guidance to supervisors at their agency on completing the training requirements
- ❖ Attend Quarterly HMIS agency lead/T-3 meetings
- ❖ Distribute new information and announcements from HMIS System Administrators and Coordinated Entry for All to relevant areas of their agency
- ❖ Notify CEA and agency lead if staff are changing roles and no longer assessors or leaving the agency within 24 hours of notification
- ❖ Monitor ongoing user compliance with the annual CE Assessor Refresher training

- ❖ Designate T-3(s) to complete the training with new Housing Assessors
- ❖ Notify CEA if they are leaving their role as CE Liaison and designate a new CEA Liaison or interim CEA Liaison
- ❖ In collaboration with the HMIS Agency Lead, regularly review and respond to CEA assessor data quality reports and dashboards, ensuring errors are under 5%
- ❖ CEA Liaison can also have an additional Liaison to assist with the work
- ❖ Request training accounts as needed for T3 from Bitfocus Helpdesk 206-444-4001 x2

T-3 Approved Trainers

T-3 Approved Trainers are existing Housing Assessors that have experience conducting the CEA Housing Triage Tool and entering client data into the Homeless Management Information System (HMIS). T-3s are selected by their CEA Liaison, who may elect as many T-3 trainers as necessary. CEA suggests having at least two T-3 trainers at any time. The CEA Liaison may also fill the role as a T-3.

The T-3 Approved Trainer role is designed to:

- ❖ Allow agencies to select their best assessors to provide training
- ❖ Provide direct onsite training from trainers that are familiar with administering the CEA Housing Triage Tool (VI-SPDAT)
- ❖ Provide quick access to training;
- ❖ Improve quality control and allow for quick follow-up with new assessors and ongoing training in addition to the CEA monthly refresher trainings provided by CEA;
- ❖ Allow service providers to incorporate specific considerations around cultural competence when working with specific or designated populations unique to an agency, and for assessor to reflect the population being served as much as is possible.

Note: As CEA continues to evolve, the role of the Housing Assessor and the T-3 will also evolve to reflect those changes. Flexibility and patience are requested as CEA continues to change to meet the needs of our community.

T-3 Prerequisites

The following are the prerequisites for T-3:

- ❖ Complete Clarity General Webinar Training <http://kingcounty.hmis.cc/training/clarity-general-training/>
- ❖ Complete Coordinated Entry for All Overview training video <https://training.bitfocus.com/king-county-coordinated-entry-training>
- ❖ Be an approved CEA Housing Assessor in good standing with Bitfocus and CEA (see Appendix III, Housing Assessor Training plan, for more details)

- ❖ Be selected by the CEA Assessor Liaison home agency to be an Approved Trainer

Role and Responsibilities of the T-3

T-3s are required to have the skills and knowledge to effectively train a new Housing Assessor and assure consistent and accurate implantation of the Housing Triage Tool. This includes;

- ❖ Understand CEA and its purpose
- ❖ Ensure that CEA Housing Assessor policies are implemented consistently and accurately
- ❖ Understand and be able to explain and provide examples of Path to Home / Diversion as a first step in solving the housing crisis, see Path to Home Manual
https://www.kingcounty.gov/~media/depts/community-human-services/housing-homelessness-community-development/documents/CEA/Path_to_Home_Manual_v3.ashx?la=en
- ❖ Know the locations and role of the Regional Access Points (RAPS) in the CEA process
- ❖ Be fully familiar with the CEA Housing Assessor Manual
- ❖ Sign off on all areas of the Training Checklist for each new Housing Assessor that they train
- ❖ Provide additional training and data entry review to Housing Assessors as needed to ensure competency

T-3 Expectations for Training Housing Assessors

Following Appendix III T-3 Training Checklist for New CEA Assessors, ensure all components of the checklist are completed for each new Housing Assessor. Details on each section can be found in the Seattle/King County Coordinated Entry for All Housing Assessor Manual V8. In addition, the following must also be covered;

- ❖ Ensure the new Housing Assessor is knowledgeable of resources outside of CEA to address the clients immediate triage needs including connections to shelters, food resources, behavioral health, health services, and other emergency services
- ❖ Ensure that the training requirements are not only met, but that the new assessor is proficient in the process and data entry requirements
- ❖ Responsible for ensuring the Housing Assessors they train are operating in compliance with CEA Code of Ethics / Confidentiality guidance. Raise concerns of violations with CoC Leadership. **See Appendix V Code of Ethics/ Confidentiality.**

Resources:

CEA Housing Assessor Manual V8 https://www.kingcounty.gov/~media/depts/community-human-services/housing-homelessness-community-development/documents/CEA/CEA_Assessor_Manual,-d-,_V8,-d-,Final,-d-,10,-d-,2,-d-,2020.ashx?la=en

King County HMIS User Manual

<http://kingcounty.hmis.cc/wp-content/uploads/2019/10/King-County-End-User-Training-Manual-October-2019.pdf>

Housing Assessor Training Verification

The T-3 and new Housing Assessor are required to complete training documents as outlined in Appendix II Housing Assessor Training Plan and submit them to the CEA Liaison at your agency. These are then sent in via Google Form:

<https://docs.google.com/forms/d/1SITLltF4VTVnHEAuy3NH2EzlgmvaujpgzY9vofpU7pg/edit>) to CEA.

The following Items will need to be completed prior to requesting access.

- ❖ Successful Completion of all the items on the Assessor Training Plan
- ❖ Administering the CEA Housing Assessor Quiz
- ❖ All items on the T-3 Training Checklist for New Assessors
- ❖ Provide the new assessor with CEA related website resources including:
 - www.kingcounty.gov/cea
 - <http://kingcounty.hmis.cc/>
 - <https://get.clarityhs.help/hc/en-us>

Appendices

Appendix I Glossary of Terms

CEA (Coordinated Entry for All) – The process where any eligible household can complete a Housing Triage Tool 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.

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

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

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

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

Diversion- (also referred to as diversion) is a service that diverts individuals and households from the homeless housing system and CEA. Diversion can provide certain types of services that can assist in resolving a homeless housing crisis much sooner than waiting for a CEA resource. Diversion solutions may be temporary or permanent but must come to fruition within 30-days and last a minimum of 90-day. For detailed information on Diversion go to the CEA website at:

<http://www.kingcounty.gov/depts/community-humanservices/housing/services/homeless-housing/coordinated-entry/providers.aspx> and look under Manuals.

Eligible Household - CEA serves young adults, families, veterans, and single adults who are literally homeless according to the category 1 HUD definition of homelessness or

fleeing/attempting to flee domestic violence, and single young adults (ages 17.5-24) who are imminently at risk of homelessness within the next 14 days.

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 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.

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

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, assessment for potential referral to a CEA resource and mainstream resource connection. They 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 18-24, 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.

Transition Age Youth (Young Adult) – An individual who is 17.5-24 years old. There are programs targeted to serve individuals in this age range. Young adults may also be eligible for single adult programs.

VI-SPDAT (Vulnerability Index- Service Prioritization Decision Assistance Tool) – Also referred to as the Housing Triage Tool (HTT), 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.

Appendix II Housing Assessor Training Plan



HOUSING ASSESSOR TRAINING PLAN Training Checklist and Verification for New Assessors

Organization Name: _____

Trainer Name: _____

Trainer Email: _____

Trainee Name: _____

Trainee Email: _____

CEA Liaison Name: _____

New Assessor training plan:

The following is a step-by-step guide for T-3 trainers to use when training new Housing 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

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

Follow this link to register for an upcoming webinar

<http://kingcounty.hmis.cc/training/clarity-general-training/>

Date Completed: _____

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

Date completed: _____

Step 2 ☐ **Watch the CEA Training Video-** This is a complete overview of CEA system and CE HMIS processes located at: <https://training.bitfocus.com/king-county-coordinated-entry-training>

Date Completed: _____

Step 3

☐ **In-person training with a certified CEA T-3 trainer (see Training Checklist below)**

Date completed: _____

Step 4

☐ **New Housing Assessor reviews the Housing Assessor Manual**

Date completed: _____

Step 5

☐ **Refresher training-** all assessors are required to attend the next available refresher training 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 5th Ave, Seattle, King County Chinook Building or online webinar. Access to a monitor is required for attending online. Dates for training can be found on the CEA website: <https://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx>

Date completed: _____

I certify that all training requirements have been completed:

Trainer Name: _____ **New Housing Assessor Name:** _____

Trainer Signature: _____ **New Housing Assessor Signature:** _____

Today's Date: _____

Appendix III T-3 Training Checklist for New CEA Housing Assessors

Part I

The T-3 must cover the following topic areas when training a new CEA Assessor. Please check the box as you complete each task. ***Please check the King Co. CEA website for the most current version of the T-3 Manual and review it before you begin training.***

Preliminary Training

- ☐ Find and utilize the Housing Assessor Training Plan (Appendix II of the T-3 Manual)
- ☐ Ensure that new Assessor watches the CEA Training Video and takes the Clarity HMIS General Training prior to proceeding with the rest of this Training Plan
- ☐ Notify your Agency HMIS Lead, to request a Clarity HMIS user name and password for the new Assessor after completion of Clarity General Training

Creating households/profiles (HMIS)

- ☐ How to create a new profile
 - ☐ How to create a household and link household/family members together
 - ☐ How/when to create a group enrollment

De-Identified households

- ☐ When to create a de-identified profile (Fleeing DV, client refuses to consent for any reason)
- ☐ How to create a de-identified profile in HMIS (consent refused toggle)
- ☐ Securely sending identified information to CEA - how and what information

HMIS Consent

- ☐ Where HMIS Consent form available in multiple languages, including braille
- ☐ How identified/consenting individuals should complete the HMIS Consent form (paper upload, verbal, e-signature)
- ☐ How de-identified/non-consenting individual's HMIS Consent form should be completed
- ☐ How to set permission to "No" for a non-consenting individuals
- ☐ How and when to complete and process the Revocation of Consent form
- ☐ How and when to contact Helpdesk for a consenting client/household who is now fleeing DV
- ☐ How to complete and upload the Veteran ROI form

Code of Ethics / Confidentiality

- ☐ Review of King Co. CEA Code of Ethics/Confidentiality (Appendix IV of T-3 Manual)

CEA Appointment Paperwork and Process

- ☐ Review all paperwork in CEA appointment process, including:
 - Opening/Closing/FAQ scripts
 - Diversion conversations / Path to Home information
 - Client Next Steps

CE Program Enrollment / Housing Triage Tool (VI-SPDAT)

- ☐ How to switch between Coordinated Entry Agency and your “Home” Agency
- ☐ How/when to enroll household vs individual into the Coordinated Entry System Agency Program
- ☐ How/where and when to enter CE Services (HoH only) (note: RAP will enter under RAP program)
- ☐ How/when to complete the Current Living Situation Assessment (HoH only)
- ☐ Understanding of the difference between the 3 versions of HTT within the Assessment Program and when to use (TAY, Family, Single Adult)
- ☐ How/when to do a Flag Review
- ☐ How to make sure individual/household retains “Active” status

Contact and Location Tabs

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

Client Notes vs. Public Alerts

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

Priority Pool / CEA Referrals

- ☐ What is the Coordinated Entry System Priority Pool (CEA Project) and how does it work?
- ☐ What is Case Conferencing?
- ☐ How to tell if an individual/household has received a CEA referral
- ☐ Review of the types of homeless housing programs available through CEA (ie. Permanent Supportive Housing, RRH, Transitional, etc.)

Questions from individuals/households

- ☐ Review scripts / how to answer questions from households
 - ☐ Where am I on the waitlist?
 - ☐ What type of housing will I be referred to?
 - ☐ When will I receive a referral?
 - ☐ How and how often should I update my information?

Where to go for help

- ☐ Bitfocus Helpdesk – (206) 444-4001 x2 or kcsupport@bitfocus.com
- ☐ CEA Housing Assessor Manual (found on King County CEA website)
- ☐ Your Agency T-3 trainer

Part II

1. Walk through all questions of the Housing Triage Tool (VI-SPDAT) in HMIS
2. New Assessor shadows T-3 Trainer for at least 2 HTTs. T-3 Trainer shadows new Assessor for at least one HTT (shadowing more than one is preferred, including one de-identified household if possible)
3. T-3 conducts a quiz review and then administers the CEA Assessor Quiz to the new Assessor (score of 100% must be achieved)
4. T-3 forwards the completed Quiz and the completed Housing Assessor Training Plan (Appendix II) to the CEA Liaison. The CEA Liaison will submit the google form to request access from CEA
5. The new Housing Assessor must attend the next online Refresher Training, either during their onsite training or right after depending on the schedule. This training will be hosted by a member of the CEA team in collaboration with the HMIS System Administration Team. Visit the King County CEA website for schedule.



CEA HOUSING ASSESSOR QUIZ

Name: _____ **E-mail** _____

Agency: _____ **Date:** _____

1. Can I change the questions on the triage tool to clarify more information?
Yes/No

2. 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.

3. 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.

4. Households are prioritized in the Priority Pool by which method.
 - A. How long they’ve resided in King County.
 - B. How well they self-advocate.
 - C. By vulnerability.

5. Which is an appropriate example of when to flag a triage tool?
 - A. When the household specifies that 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 household.

- C. When the assessor knows for certain there is a disparity in what the household 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.

6. Which example is best when writing a flag note?

- A. Write a 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 households' situation and that would significantly impact a score or vulnerability not captured in the assessment.
- C. Indicate where CEA can reach the household for more information.

7. Which is the most accurate description of 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 Priority Pool is not a waitlist, but more like a pool of applicants we are currently working with to house. 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.

11. When do I complete a Current Living Situation Assessment?

- A. When a new CE Program Enrollment is created
- B. When a new HTT is completed or Updated
- C. When a CE Service is recorded
- D. All above scenarios warrant a new Current Living Situation Assessment

12. When should Contact and Location information be updated?

- A. Never
- B. Review and update at each interaction
- C. At program intake only
- D. Only when updating assessments

Appendix V Code of Ethics / Confidentiality



Code of Ethics / Confidentiality Households have the right to expect that information you obtain about them is kept confidential and is used only for the purposes of obtaining housing through 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.

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