

**Coordinated Entry for All  
Certified Trainer (T-3)  
User Manual  
Version 3**

# Table of Contents

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**Vision**

**T-3 Certified Trainers**

**T-3 Prerequisites**

**Roles and Responsibilities of the T-3**

**Training Requirements of the T-3**

**HMIS Data Quality Requirements**

**Training documentation Requirements**

**Glossary of Terms**

**Appendices**

# Vision

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The purpose of Coordinated Entry for All (CEA) Certified Trainers (T-3) is to ensure a uniform method of training Housing Assessors throughout the King County CEA System.

The T-3 Certified Trainer role is designed to:

- ❖ Allow agencies to select their best assessors for CEA training certification;
  - ❖ Provide direct on-site 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 competency 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 CEA Assessor (also known as screener) and the T-3 will also evolve to reflect those changes. Flexibility and patience is requested as CEA continues to change to meet the needs of our community. CEA is moving to a diversion first approach and phased assessment this change will led to less people entering the homeless services system where housing is limited.
- Agencies may request new assessors based on their agencies needs for more capacity. New Assessor should be trained by the T-3 before requesting Assessor tab access. Once the training is completed please send the request to Jennell Hicks, CEA Capacity Builder at [Jennell.hicks@kingcounty.gov](mailto:Jennell.hicks@kingcounty.gov) please submit all required and signed off paperwork via e-mail at this time. See T-3 manual for a complete check off list. Please scan each person's documents individually when sending over. Be sure and send the new Assessors name and e-mail contact Bit-focus needs this to grant access.

## T-3 Certified Trainers

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T-3 Certified Trainers are existing Housing Assessors that have experience conducting the CEA 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 Coordinating Entity to gain their training certification. In the case an agency has lost all of their T-3 we are offering quarterly trainings for new T-3s to be added please ensure you agency has at least two people trained as T-3s.

## T-3 Prerequisites

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The following are the prerequisites for T-3 Certification:

- ❖ Complete Coordinated Entry for All Overview webinar
- ❖ Complete Clarity General Webinar Training
- ❖ Be an approved CEA Housing Assessor in good standing with Bitfocus and CEA (see Appendix I, CEA Housing Assessor Training plan, for more details)
- ❖ Be selected by home agency to be a Certified Trainer

## Role and Responsibilities of the T-3

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Responsibilities of the T-3 include;

- ❖ Understanding CEA and its purpose;
- ❖ Ensure that CEA Housing Assessor policies are implemented consistently and accurately  
[http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor\\_Manual,-d-,\\_V6\\_\(1\).ashx?la=en](http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor_Manual,-d-,_V6_(1).ashx?la=en);
- ❖ 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 located at  
<http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx>;
- ❖ Know the locations and role of the Regional Access Points in the CEA process.

## Training Requirements of the T-3

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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;

- ❖ Responsible for assuring the Housing Assessors they train are operating in compliance with CEA Code of Ethics / Confidentiality guidance. **See Appendix II Code of Ethics / Confidentiality;**
- ❖ Following CEA Policies and Procedure as outlined in the CEA Operations Manual  
<http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx>

- ❖ Ensuring that the new assessor is fully trained in the standard implementation of CEA Housing Triage Tool;
- ❖ Entering the Triage Tool accurately into the HMIS system;
- ❖ Ensuring the new assessor fully understands when and how to flag a Housing Triage Tool, see Housing Assessor Manual located at [http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor\\_Manual,-d-,\\_V6\\_\(1\).ashx?la=en](http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor_Manual,-d-,_V6_(1).ashx?la=en);
- ❖ Ensuring the new assessor fully understands how to navigate HMIS and the importance of data quality;
- ❖ Ensuring the new assessor understands when to update a Triage Tool and when to administer a new Triage Tool;
- ❖ Ensuring the new assessor knows what version of the Triage Tool to use for each situation (VI-SPDAT, TAY-VI-SPDAT, F-SPDAT);
- ❖ Ensuring the new assessor understands when to de-identify clients and that identifying information must be sent to CEA in order for a Referral Specialist to make a housing referral. Information sent must include Unique Identifier, contact information, gender, and date of birth. Information must then be sent to CEA via **secure** email [cea@kingcounty.gov](mailto:cea@kingcounty.gov); If you agency does not have a secure e-mail system please request one from CEA at [cea@kingcounty.gov](mailto:cea@kingcounty.gov) we will start the secure email chain. You can use the secure email multiple times.
- ❖ Ensuring the new assessor fully understands the HMIS Community Queue (note assessors are no longer adding families to the community queue CEA is now managing the queue), how housing referrals are made, and how the pool of housing operates (that there is not a waitlist, but a pool of eligibility);
- ❖ Ensuring the new assessor understands the Housing Triage Tool Disability Accommodation, located in the Assessor Manual [http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor\\_Manual,-d-,\\_V6\\_\(1\).ashx?la=en](http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor_Manual,-d-,_V6_(1).ashx?la=en);
- ❖ Be fully familiar with the CEA Housing Assessor Manual [http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor\\_Manual,-d-,\\_V6\\_\(1\).ashx?la=en](http://www.kingcounty.gov/~media/depts/community-human-services/housing/documents/cea/Assessor_Manual,-d-,_V6_(1).ashx?la=en);
- ❖ Be 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.

## HMIS and Data Quality

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**Thoroughly and accurately training your new assessor on HMIS and the importance of data quality is crucial.** The information derived from HMIS is what determines performance measures for all programs throughout our Continuum of Care and can impact funding. Take your new assessor through the entire HMIS data input process. You must include all of the following:

- ❖ **Checking HMIS first** to determine if a Profile exists and if a Triage Tool has already been completed on the client/household

- ❖ Creating a profile for each household member (each members status is related to Head of household for example is mom is head of household her son's relationship will be son, this is important with multi-generational living to know what the relationships are of people in the household make sure and keep this consistent by stated each person's relationship to the Head of Household).
- ❖ Ensuring the new assessor understands ROIs including a VA ROI if the client is a Veteran.
- ❖ De-identifying households that are fleeing or attempting to flee domestic violence, identify as having HIV/AIDS, or refuse consent. Detailed information on de-identifying clients can be found in the King County HMIS User Manual located at <http://kingcounty.hmis.cc/wp-content/uploads/2015/09/King-County-End-User-Training-Manual.pdf>
- ❖ Making sure the new Assessor knows to send identifying information to CEA. If identifying information for de-identified clients is not sent to CEA, there will be no way to offer a resource. Information can be faxed to 206-899-1650, or sent via **secured** email to [cea@kingcounty.gov](mailto:cea@kingcounty.gov). Include Unique Identifier, contact information, gender and date of birth
- ❖ Inputting the Triage Tool accurately and ensuring all fields are complete
- ❖ Ensuring households are correctly linked and Head of Household correctly demarcated.
- ❖ Ensuring households are referred to the Community Queue when referring is appropriate
  - Resources: Housing Assessor Manual, Young Adult Housing navigator Manual, and Path to Home Manual <http://www.kingcounty.gov/depts/community-human-services/housing/services/homeless-housing/coordinated-entry/providers.aspx>
  - King County HMIS User Manual <http://kingcounty.hmis.cc/wp-content/uploads/2015/09/King-County-End-User-Training-Manual.pdf>

## Training Documentation Requirements

The T-3 and new Housing Assessor are required to complete training documents as outlines in Appendix I and submit them to the CEA Contract Monitor in order for the new Housing Assessor to gain access to the Housing Triage Tool in HMIS:

- ❖ Completion of the Assessor Training Plan
- ❖ Administering the CEA Housing Assessor Quiz
- ❖ Notifying the CEA Capacity Builder when all training has been completed, providing completed training materials, and requesting new assessor access to the assessor tab in HMIS. Send completed materials to, [Jennell.hicks@kingcounty.gov](mailto:Jennell.hicks@kingcounty.gov) . Training materials are located in Appendix I. **Assessor tab access in HMIS will not be granted until completed training materials are received.**
- ❖ Provide the new assessor with CEA related website resources including:
  - [www.kingcounty.gov/cea](http://www.kingcounty.gov/cea)
  - [www.kingcounty.hmis.cc](http://www.kingcounty.hmis.cc)
  - <https://get.clarityhs.help/hc/en-us>

All CEA related manuals can be found on the King County CEA website.

# Glossary of Terms

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**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.

**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 all 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. 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 Assessor** – Outreach personnel that work in the field to assist households complete a Housing Triage Tool that are unable to visit a physical Regional Access Point location.

**Path to Home (also known as Diversion)**- 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 provides certain types of financial assistance and can resolve 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, 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.

**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 17.5-24 years old. There are programs targeted to serve individuals in this age range. Young adults may also be eligible for single adult programs.



**Appendix I**  
**CEA Housing Assessor Training Materials**



**HOUSING ASSESSOR TRAINING PLAN**  
Training Checklist and Verification for New Assessors

**Organization Name:** \_\_\_\_\_

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

**Trainee Name:** \_\_\_\_\_

**Trainee Email Address:** \_\_\_\_\_

**All training materials including request for HMIS access to Bitfocus from the agency HMIS Lead must be completed before Assessor Tab access is granted.**

**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 certified CEA trainer, observing the trainer conduct triage** (include overview of the Housing Assessor Manual).

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

**Step 4**

**In-person training with a certified CEA trainer, being observed conducting triage by trainer.**

**Step 5**

**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 every other month. All Refresher trainings are one-hour and a half in length and are located at 401 5<sup>th</sup> Ave, Seattle, King County Chinook Building. Please check CEA website for Refresher Training Dates and T-3 training dates.**

**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. What box should an Assessor never check 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 Community Queue 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 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.

6. 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.

**7. 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 temporary or permanent housing plan that can be executed within 30-days, and last at least 90-days.
- C. It can be used for homeless prevention, keeping people from entering into homelessness.

**8. 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. When a housing resource comes available, the household is matched through case conference and assigned a housing navigator to work with them. Households are assigned to the priority pool based on the number of housing resources which are available. Not everyone screened will be added to the priority pool due to the limited number of resources. We are moving to a Diversion first approach to divert people from the homeless services system.
- C. You will get housing as soon as something opens.

**9. Who do you call is you have problems with our HMIS system?**

- A. 211
- B. Coordinated Entry for All
- C. Bit Focus Help Desk- 206- 444-4001 X2

**10. How should an assessor respond to a household that expects quick access to a permanent housing resources through CEA?**

- A. Housing accessed through CEA is subsidized and resources are extremely limited. Have you heard about some called diversion?
- B. It might take some time, but you'll get housing.
- C. You will get housing as soon as something opens.

**Appendix II**  
**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.

- Assessors will meet with households in an environment that protects privacy and confidentiality.
- Use culturally and linguistically competent practices
- Assessor 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.