



Coordinated Entry Housing Provider HMIS User Manual

WA-500 Seattle/King County CoC





About this Resource

The purpose of this document is to provide users with step-by-step guidance on how to engage with Clarity Inventory so programs can receive and process referrals from Coordinated Entry using the HMIS.

Other Helpful Resources

- Visit the [Training Guides & Tools](#) Page of the HMIS Support Website
- Reach out to the Help Desk for Technical Assistance (206) 444-4001, Ext 2 | kcsupport@bitfocus.com | Chat widget directly in Clarity
- Stay apprised HMIS Inventory Events that may be occurring: kingcounty.bitfocus.com/kc-events

Topics Covered

Edit Building Attributes

When would you do this?
Understanding Building CE Participation Attribute
How to Update Building Attributes

Edit Unit Attributes

When would you do this?
Understanding Unit Referral Pathway Attribute
How to Update Unit Attributes

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When would you do this?
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When would you do this?
How to Complete a Unit Transfer

Edit Building Attributes

When would you do this?

You will edit building attributes when changes to the following occur:

1. Operating Hours
2. Transit Accessibility & Parking
3. Building Features & Accessibility

- a. Uses of Communal Bathrooms
- b. WiFi Availability
- c. Laundry Facilities
- d. Air Conditioning
- 4. Building Policy
 - a. Pets Allowed
 - b. Guests Allowed
- 5. Sobriety Policy
- 6. Max Lengths of Stay
- 7. Other Residential Policies
- 8. Eligibility Criteria
 - a. Sex Offender Screening Policies
- 9. On-Site Medical Services
- 10. Other On-Site Services
- a. Housing Navigation
- b. Case Management
- c. Employment
- 11. Meals & Food Provided
- 12. Storage Availability
- 13. Building CE Participation

Understanding Building CE Participation Attribute

All Units Participate in CE

You must select “*All units participate in CE*” for the Building CE Participation attribute if the entire building receives referrals from Coordinated Entry only.

- When “*All units participate in CE*” is selected at the building level, unit CE participation is assumed, and you do not have to specify this specific component at the unit level.

Some Units Participate in CE

You must select “*Some units participate in CE*” for the Building CE Participation attribute if only some building units receive referrals from Coordinated Entry.

- When “*Some units participate in CE*” is selected at the building level, specific unit participation must be identified within the unit attribute “Referral Pathway-Housing.” Review how to update Unit Attributes below.

No Units Participate in CE

You must select “*No units participate in CE*” for the Building CE Participation attribute if no units receive referrals from Coordinated Entry.

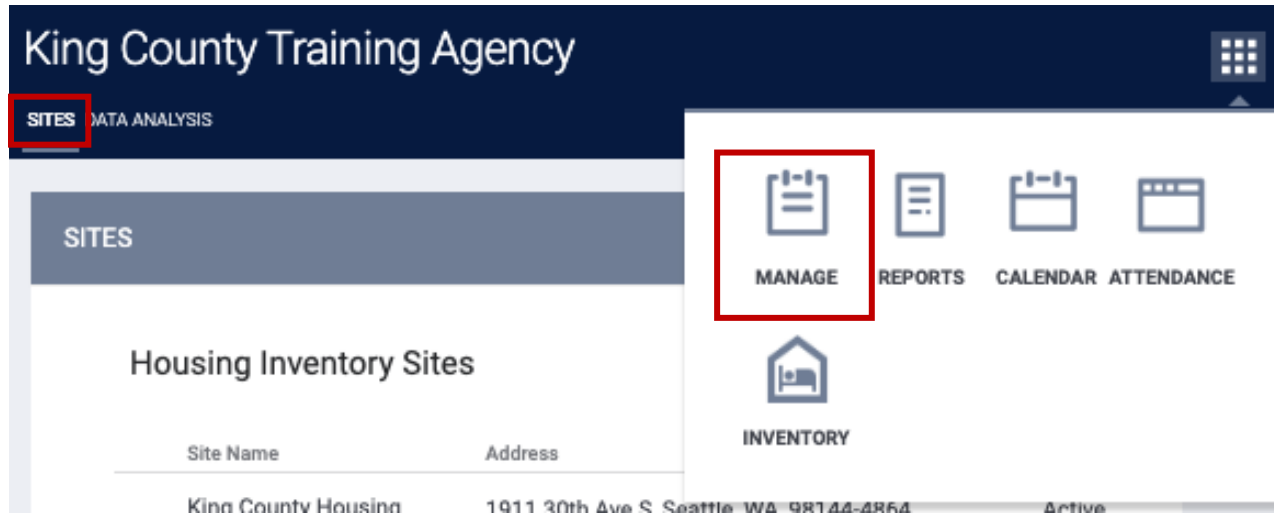
- When “*No units participate in CE*” is selected at the building level, unit non-participation is assumed, and you do not have to specify this attribute at the unit level.

Important Reminders:

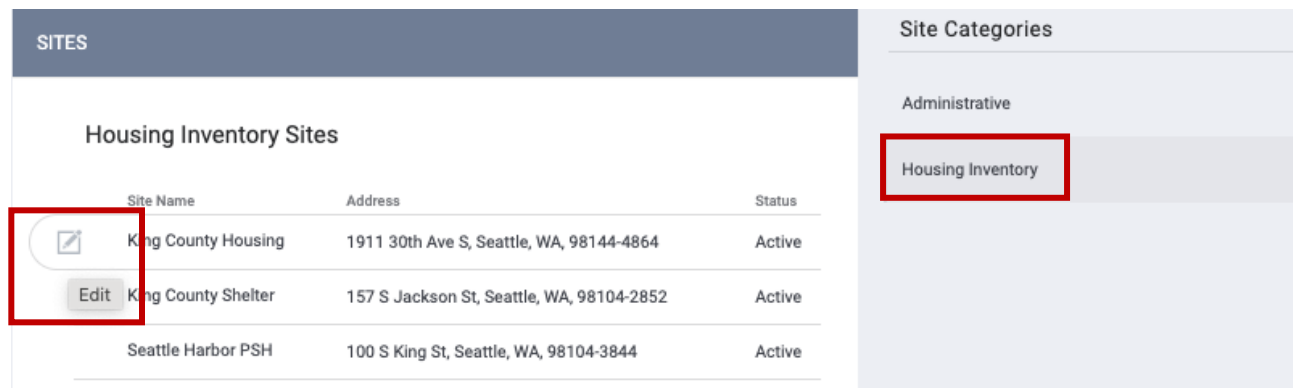
1. This designation must align with funder requirements. The default selection in Clarity for the Building CE Participation attribute is “Select.” You must make sure the Building CE Participation is accurate.
2. **For Rapid Re-Housing and Scattered Site Programs:** These programs do not have Buildings so CE participation must be indicated on the unit level.

How to Update Building Attributes

1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
 - a. If you don’t see “Manage” from your launchpad and/or the Sites tab, you need to have your agency lead request this access from the Help Desk.




2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.
 - a. Please note, RRH programs do not have buildings - they only have Unit “Slots.”





3. Navigate to Buildings & Units where you will be able to edit Building Attributes.

KING COUNTY HOUSING: BUILDINGS

| Building Name | Description | Status |
|---|-------------|--------|
|  King County PSH | | Active |

Managed with Clarity Human Services

MODIFY BUILDING

| | |
|---------------|--|
| Building Name | King County PSH |
| Start Date | 01/01/2023  |
| Status | Active  |

Site Resources

- Overview
- Programs & Projects **1**
- Buildings & Units **1****
- Funding Sources **0**

Edit Unit Attributes

When would you do this?

You will edit unit attributes when changes to the following occur:

1. The Referral Pathway (If Unit Specific)
2. ADA and Other Unit Specific Features
3. Focus Population
4. Eligibility Criteria
 - a. Income Level Restrictions

- b. Household Sizes
- c. Demographics

You must select “*Coordinated Entry System*” for the specific units that receive referrals from Coordinated Entry when the Building CE Participation is “*Some units participate in CE.*”

Understanding Unit Referral Pathway Attribute

Referral Pathway – Housing/ Shelter

- When “*When some units participate in CE*” is selected at the building level, the Coordinated Entry team will only know the specific units to refer to when “*Coordinated Entry System*” is selected as a Referral Pathway for the unit.

Please note: The default selection in Clarity for the unit “Referral Pathway” attribute is “Select.” You must make sure the unit’s Referral Pathway is updated when a building has a blend of CE and Non-CE units.

How to Update Unit Attributes

1. Once you are in the Building (or Site for RRH Programs) that holds the Units you’d like to update, you will select “Units” underneath Building Resources.





The screenshot displays the 'MODIFY BUILDING' interface. On the left, a form contains the following fields: 'Building Name' (King County PSH), 'Start Date' (01/01/2023), 'Status' (Active), and 'Description'. On the right, a sidebar titled 'Building Resources' lists several categories: 'Overview', 'Programs & Projects 1', 'Funding Sources 0', 'Unit Configuration Type 1', and 'Units 8'. The 'Units 8' item is highlighted with a red rectangular box.

2. Select the Edit icon of the unit you’d like to update where you will be able to update Unit Attributes.

UNITS

| Unit Name | Unit Configuration Type | Beds | Availability |
|-----------|-------------------------|------|--------------|
| Unit 101 | PSH - Adult - 1 BR | 1 | Available |

Edit Unit **MODIFY UNIT**

| | |
|-------------------|---|
| Unit Name | Unit 101 |
| Unit Start Date | 01/01/2023  |
| Status | Active  |
| Status Start Date | 01/01/2023 12:00 AM  |
| Status End Date | __/__/__ :__ AM  |

Edit Unit Status From the Inventory Map

When would you do this?

You will edit a unit's status if an active unit needs to be taken offline or if an offline unit needs to become active.

Understanding Active to Offline Unit Status

You would change a unit's status from active to offline for the following reasons:

1. Cleaning
2. Maintenance
3. Held for Mobility Transfer
 - a. Unit is being held for a mobility transfer from CE
4. Held for Internal Transfer
 - a. Unit is being held for an internal transfer within the agency
5. Staffing Capacity
 - a. Program is at capacity and cannot fill units
6. Bed Bugs
7. Meth or Drug Remediation
8. Fire Damage
9. Flood Damage
10. Isolation and Quarantine
11. Shelter Relocation
 - a. Shelter is moving locations
12. RRH Offline
 - a. Use this option for RRH extra slots as capacity shifts

Understanding Offline to Active Unit Status

You would change a unit status from offline to active for the following reasons:

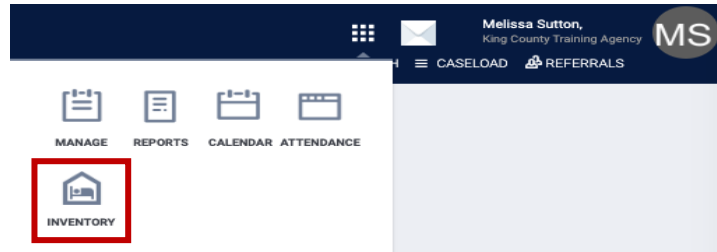
1. You need to end an auto Offline status early
2. You need to end a manually set Offline status.

Important Reminders:

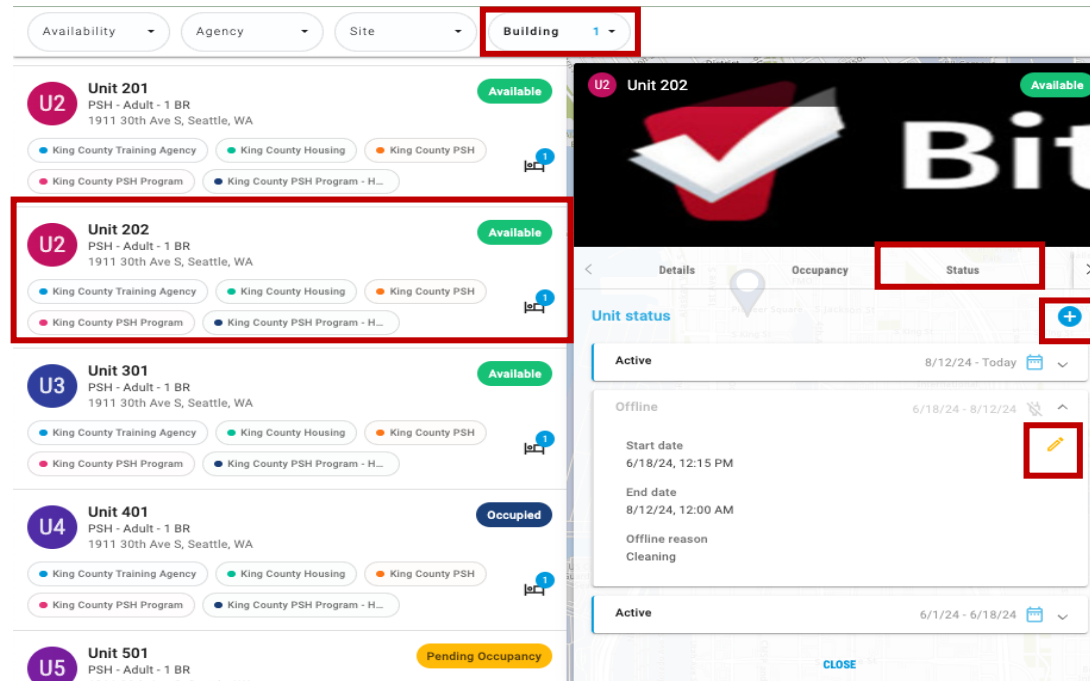
1. When a client exits from an enrollment, the associated unit immediately becomes available for referral unless you manually change the unit status to Offline, except for PSH programs.
2. **For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can end this Offline status early or keep the unit Offline for longer should you need. Please update the Offline Reason as appropriate.
3. You should never use an Inactive status. If you need to take a unit completely offline indefinitely, you will submit a [Project Change Request](#).

How to Edit a Unit Status from the Inventory Map

1. Your user access role must have the following access rights enabled:
 - a. Inventory – Add Bed/Unit Status
 - b. Inventory – Edit Bed/Unit Status
2. Navigating to the Inventory Map



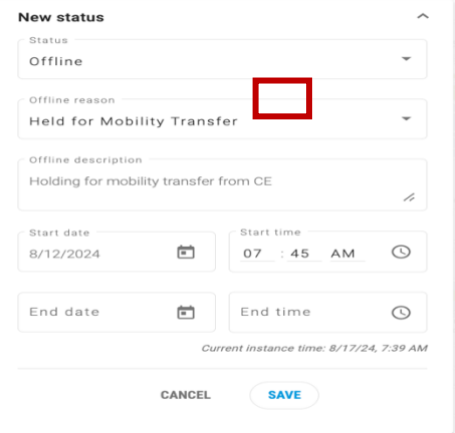
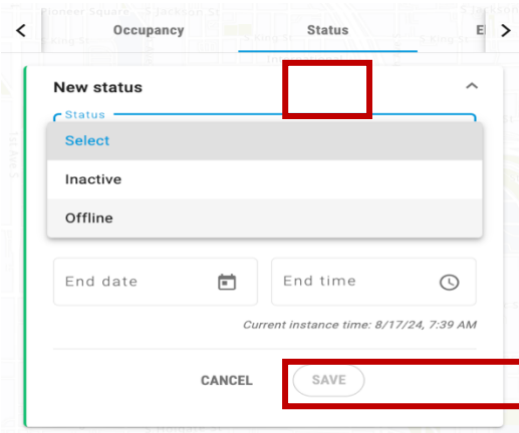
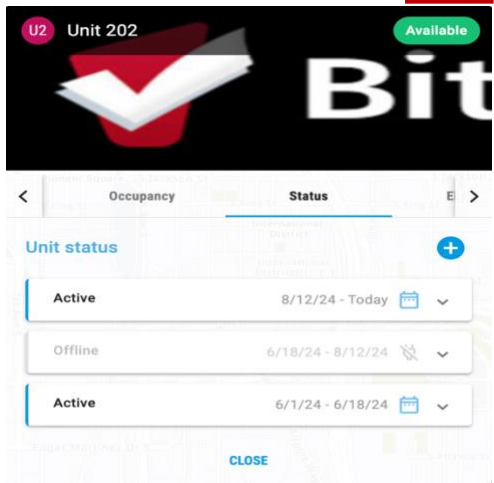
3. Identify the building/unit you wish to edit the status of and navigate to the status tab of the Unit card.



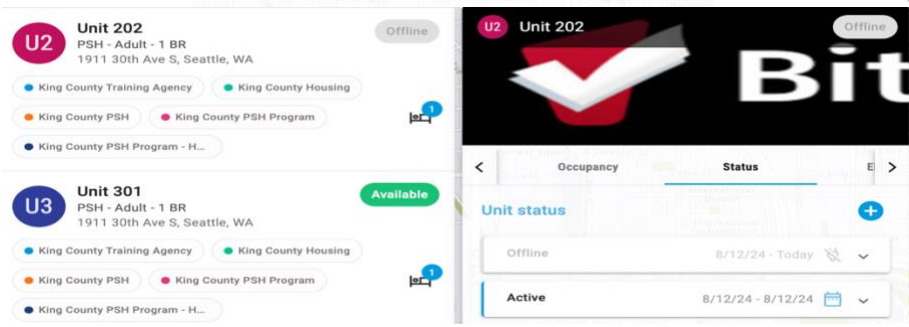
a. If you do not see an “Add” symbol and/or an “Edit” icon for Offline Status’, you need to have your agency lead request this access from the Help Desk.

How to Change a Unit Status from Active to Offline

1. From the unit card, navigate to the status tab and select the add icon
2. Select the status of “Offline,” select the Offline Reason
3. Write an Offline description and select the date the offline status begins.
 - a. Offline start date can be in the past, present or future.
4. Indicate an end date to the Offline status if this is known
 - a. Offline end date can be in the past, present, or future.



For PSH Programs: Units for 7 days for cleaning and you can end this Offline unit Offline for longer update the Offline Reason



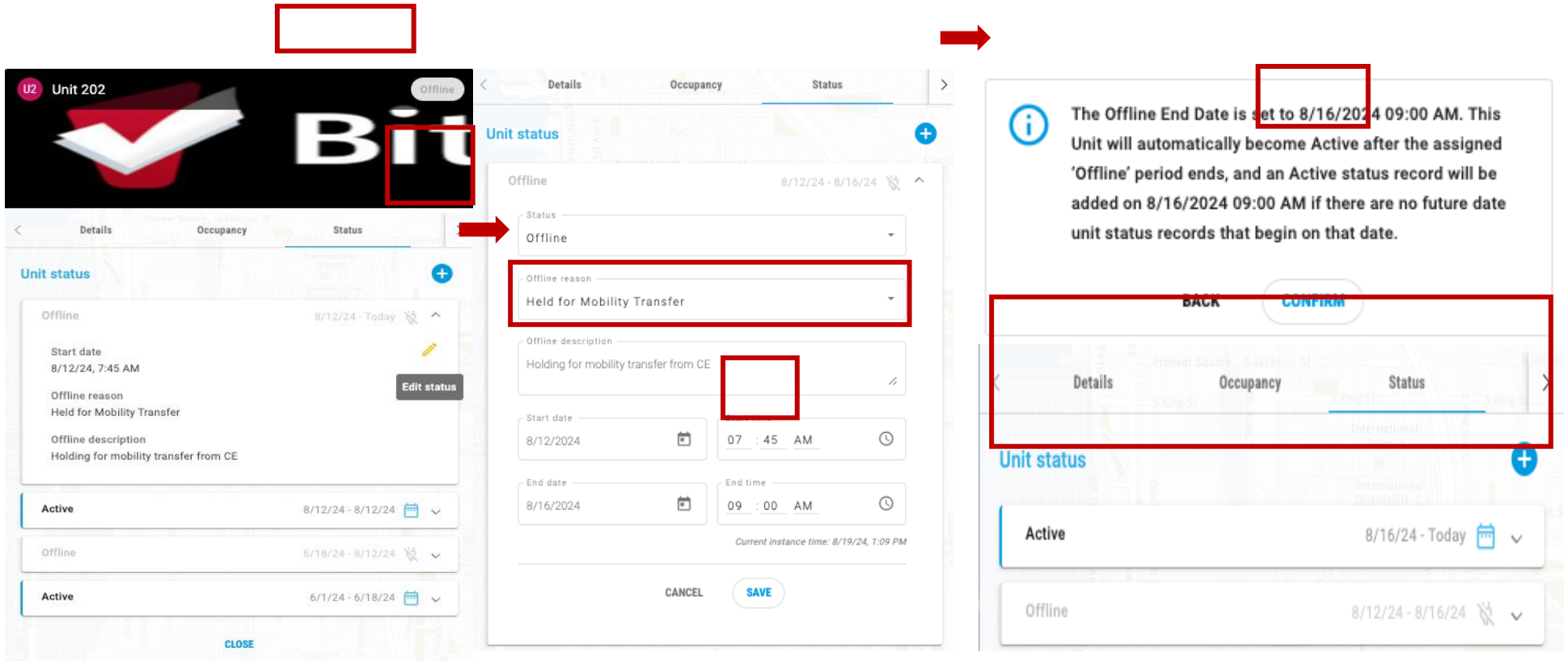
automatically turn Offline maintenance. However, status early or keep the should you need. Please as appropriate.

How to Change a Unit Status from Offline to Active

1. From the unit card, navigate to the status tab.
2. Select the dropdown arrow to the right of the current Offline Status and select the "Edit icon."
3. Enter in the date and time you would like the unit's Offline Status to end and press Save.
 - a. Offline start date can be in the past, present or future.
4. Confirm the Offline End Date.

5. You can view a unit's status history under the status tab.

Please note: You cannot “Add” an active status in the same way you can “Add” an Offline Status. You can only end and Offline status which automatically sets the unit as Active.



Update a Unit Configuration Type

When would you do this?

You will update a unit configuration type if the following changes occur:

1. The unit is used by a different program
2. The unit increases bed capacity
3. The unit changes the Household Type it serves

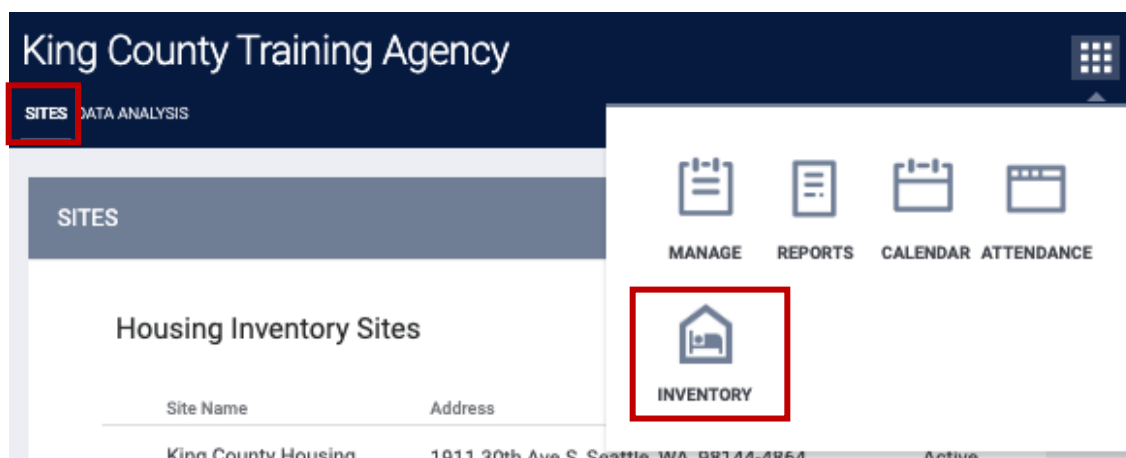
4. The unit changes the Population Types it serves, such as:
 - a. Chronically Homeless
 - b. Veterans
 - c. Youth
 - d. Non-Dedicated
 - e. Gender Specific

Understanding Unit Configuration Types

While you can apply currently active Configuration Types, you cannot create new Unit Configuration Types. There have been many Unit Configuration Types created during the implementation process based on agency/program feedback. Should you determine your program needs a new Unit Configuration Type created, please submit a [Project Change Request](#).

How to Update a Unit Configuration Type



1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
 - a. If you don’t see “Manage” from your launchpad and/or the Sites tab, you need to have your agency lead request this access from the Help Desk.



2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.
 - a. Please note, RRH programs do not have buildings - they only have Unit “Slots”.

SITES

Housing Inventory Sites

| Site Name | Address | Status |
|---|---|--------|
|  King County Housing | 1911 30th Ave S, Seattle, WA, 98144-4864 | Active |
|  King County Shelter | 157 S Jackson St, Seattle, WA, 98104-2852 | Active |
| Seattle Harbor PSH | 100 S King St, Seattle, WA, 98104-3844 | Active |


Site Categories

Administrative

Housing Inventory

3. Navigate to Buildings & Units where you will be able to edit the Building.

KING COUNTY HOUSING: BUILDINGS

| Building Name | Description | Status |
|---|-------------|--------|
|  King County PSH | | Active |

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Site Resources

Overview

Programs & Projects 1


Buildings & Units 1


Funding Sources 0

4. Once you are in the Building (or Site for RRH Programs) that holds the Units you'd like to update, you will select "Units" underneath Building Resources.

MODIFY BUILDING

Building Name King County PSH

Start Date 01/01/2023 

Status Active 





Description

Building Resources
King County Housing > King County PSH

- Overview
- Programs & Projects 1
- Funding Sources 0
- Unit Configuration Type 1
- Units 8**

5. Select the Edit icon of the unit you'd like to update where you will be able to update Unit.

UNITS

| Unit Name | Unit Configuration Type | Beds | Availability |
|--|-------------------------|------|---|
|  Unit 101 | PSH - Adult - 1 BR | 1 | Available  |
|  Unit 102 | PSH - Adult - 1 BR | 1 | Available  |

6. Scroll down to the “Unit Configurations” section of the Modify Units page where you will see active Unit Configurations.

7. You will select and drag the new Unit Configuration you would apply to the unit into the “Upcoming Configuration” section and indicate the date you would like this change to occur.
 - a. Unit Configuration start date can be in the past, present or future.

UNIT CONFIGURATIONS

Current Configuration

| Unit Configuration | Beds | Start Date | Note | Program |
|--------------------|------|------------|------|-------------------------|
| PSH - Adult - 1 BR | 1 | 01/01/2023 | | King County PSH Program |

Upcoming Configurations

No results found

ASSIGN UNIT CONFIGURATION

As Of Date

SAVE CHANGES

August 2024

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|-----|
| | | | | | 1 | 2 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Note

Available Configurations

| Unit Configuration | Beds | Note | Program |
|--------------------|------|------|-------------------------|
| PSH Adult - 1 BR | 3 | | King County PSH Program |

Processing a Coordinated Entry Referral

When would you do this?

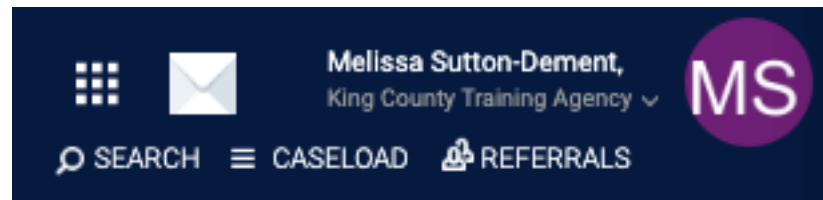
You will process referrals from Coordinated Entry for sites/buildings/units that have been indicated as participating in Coordinated Entry. Please refer to Editing Building or Unit Attributes of this manual for more information on this.

How to Process a Coordinated Entry Referral

1. Be sure to be on your search page, then navigate to the Referrals section.



2. Go to the Pending Tab. Click



Edit next to the applicable client.

Pending Community Queue Completed Denied Sent Availability Unit Queue

Pending Referrals

Search Mode Standard
Sort By Default Characteristic -- Select --

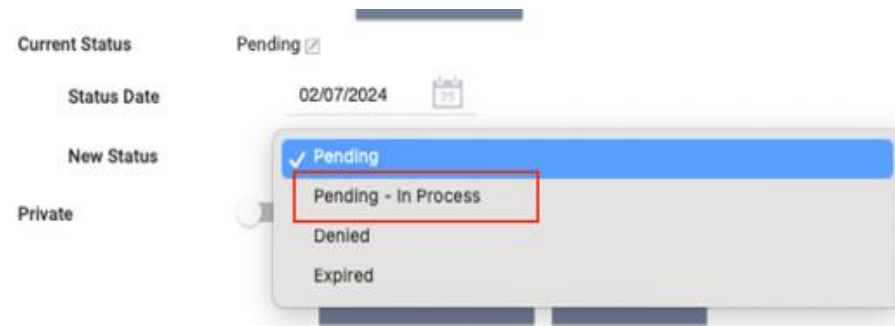
Eligible Clients Only

| Client | Referral Date | Qualified | Days Pending |
|---|---------------|------------|--|
| Jenny James Program: Barton Hills-Private Referred by: Demo: Coordinated Entry ⓘ | 08/19/2022 | Reassigned | 661 total 104 pending 578 in process |
| Dave Carter Program: River Flows PSH Referred by: Demo: Coordinated Entry ⓘ | 09/07/2022 | Reassigned | 642 total 129 pending |

3. Update Status to
 - a. If it's ineligible eligibility declined

Pending-In Process. determined client is (client did not meet requirements, client referral, client moved

into another unit, etc.) for the specific unit in the referral, update referral status “Denied” and add a note to document the reason.



A screenshot of a software interface showing a dropdown menu for 'New Status'. The 'Current Status' is 'Pending' with a checkmark. The 'Status Date' is '02/07/2024'. The dropdown menu is open, showing options: 'Pending' (selected with a checkmark), 'Pending - In Process' (highlighted with a red box), 'Denied', and 'Expired'. A 'Private' toggle is visible to the left of the dropdown.

4. To accept the referral, you will complete a program enrollment by navigating to the client's Program tab.



5. Click dropdown next to the applicable program.





A screenshot of a software interface showing a dropdown menu for program selection. The header is 'PROGRAMS: AVAILABLE'. Below it, a dropdown menu is open, showing 'Barton Hills-CoC' with a red box around the dropdown arrow.

6. Ensure “Program Placement a result of Referral provided by...” toggle is enabled.
a. Turn on toggle for household members who will be living with the head of household.




A screenshot of a software interface showing two toggle controls. On the left, a red notification bar says '1 pending referral(s). Oldest 0 days.' Below it, a blue toggle is turned on, labeled 'Program Placement a result of Referral provided by'. On the right, a blue toggle is turned on, labeled 'Include group members: Ashley Carter'.

7. Click Enroll and complete the enrollment Screen.



Enroll 'St.Vincent De Paul Emergency Shelter' program for client Emmy Sebastian

Project Start Date 02/14/2024 

PRIOR LIVING SITUATION


Type of Residence

Length of Stay in Prior Living Situation

DISABLING CONDITIONS AND BARRIERS

Disabling Condition

8. Unit assignment will happen automatically.

| Unit | Start Date | End Date |
|--|---------------------|---|
| Unit 004 Fairway Motel, Fairway Motel | 07/13/2023 12:00 AM |  |

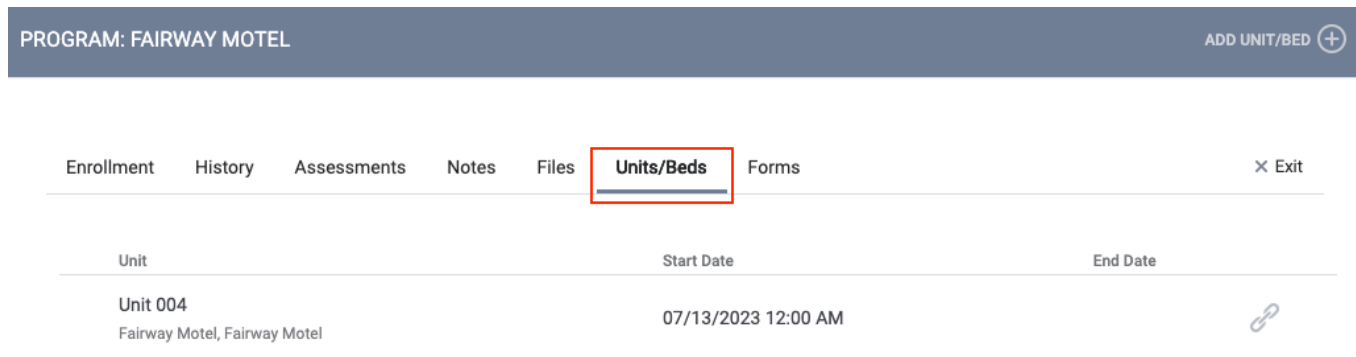
Complete a Unit Transfer

When would you do this?

Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.

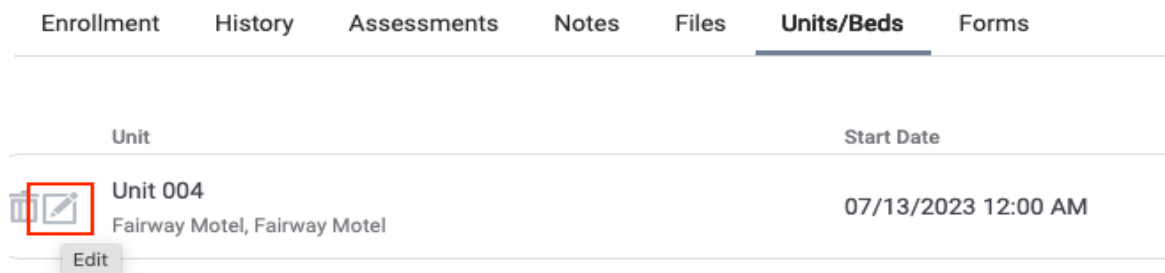
How to Complete a Unit Transfer

1. From the Program Enrollment, navigate to the Units/Beds Tab.



2. Click the

edit next to current unit.



3. Add an End Unit.

Date to the Current

- a. The Unit End Date can be in the past, present or future.

EDIT UNIT

Start Date 07/01/2024 9:00 AM

End Date 08/20/2024 12:00 AM

August 2024

Hour 12 AM

Minute 00

SAVE CHANGES

Now Done

4. Once you have ended assign a New Unit to the Unit/Bed.”

the current Unit Stay, you must Client by selecting “Add

PROGRAM: KING COUNTY EMERGENCY SHELTER

ADD UNIT/BED (+)

Enrollment History Provide Services Notes Files **Units/Beds** Forms X Exit

| Unit | Start Date | End Date |
|---|--------------------|---------------------|
| Bed 004 King County Shelter, King County Emergency Shelter | 07/01/2024 9:00 AM | 08/06/2024 12:00 AM |

5. Assign the Client to the New Unit.

- a. The Start Date should be the first night the client will sleep in the unit.
- b. Always use Client Profile Only when selecting Unit Options.

ADD UNIT/BED ✕

Start Date 08/26/2024 8:45 AM 🕒

End Date 🕒

Eligibility Override

Eligible For Partial Dates

Available Units/Beds Select...

- ▾ Client Profile Only
- Bed 004 (King County Shelter, King Coun

ADD **CANCEL**