



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

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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
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.

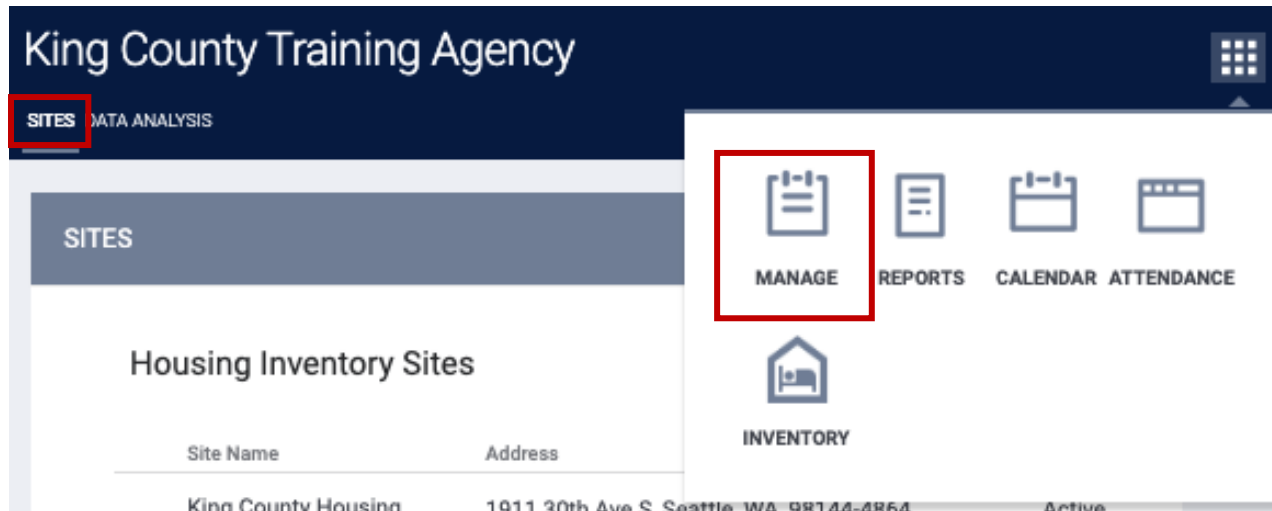
Important Reminders:

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.

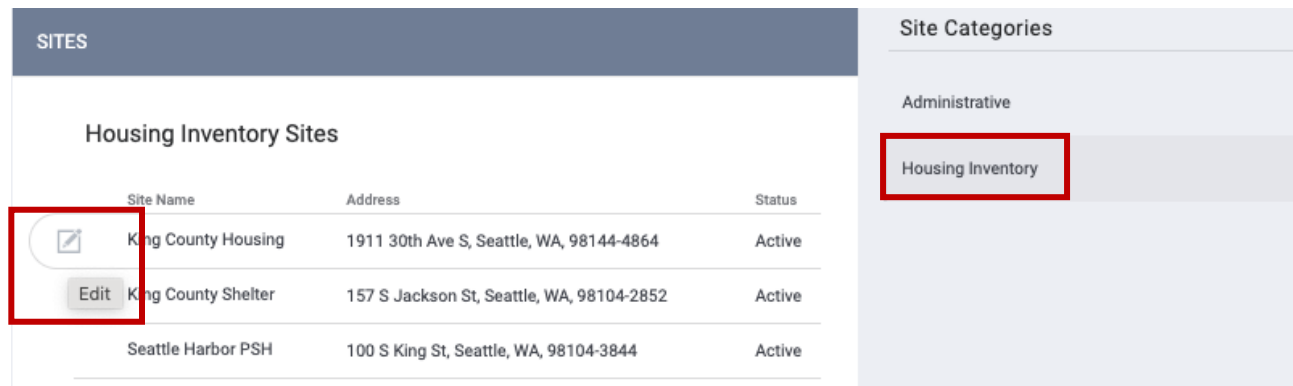
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How to Update Building Attributes

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”.



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

The screenshot displays the 'KING COUNTY HOUSING: BUILDINGS' interface. At the top, there is a table with columns for Building Name, Description, and Status. The first row shows 'King County PSH' with a status of 'Active'. An 'Edit' button is located below the first row, highlighted with a red box. To the right, a sidebar contains 'Site Resources' with menu items: 'Overview', 'Programs & Projects 1', 'Buildings & Units 1' (highlighted with a red box), and 'Funding Sources 0'. Below the table, the 'MODIFY BUILDING' form is shown with the following fields:

Field	Value
Building Name	King County PSH
Start Date	01/01/2023
Status	Active

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

Understanding Unit Referral Pathway Attribute Referral Pathway – Housing/ Shelter

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.*”

- 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. The main content area shows the following details for 'King County PSH':

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


The right sidebar, titled 'Building Resources', contains the following menu items:

- Overview
- Programs & Projects 1
- Funding Sources 0
- Unit Configuration Type 1
- Units 8** (highlighted with a red box)




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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	▼

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:

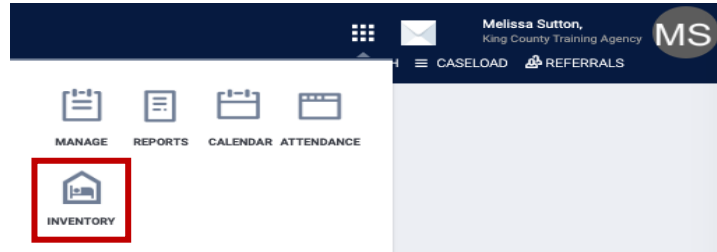
1. You need to end an auto Offline status early
2. You need to end a manually set Offline status.

Important Reminders:

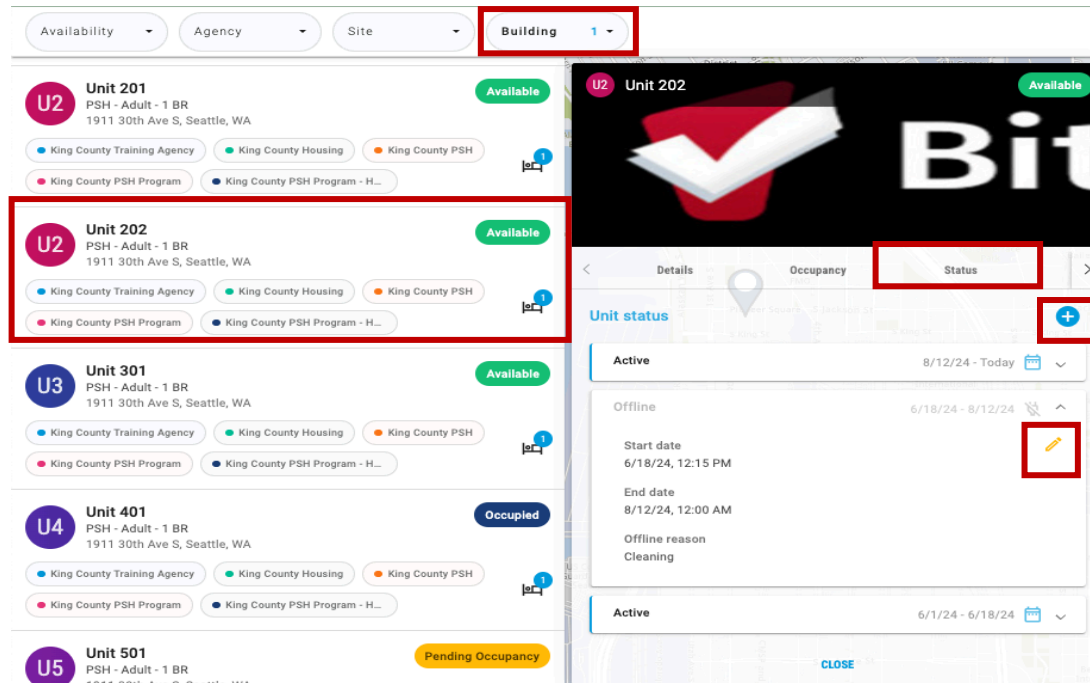
1. When a client exits from an enrollment, the associated unit immediately becomes available for referral unless you manually change the unit status to Offline, except for PSH programs.
2. **For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can 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



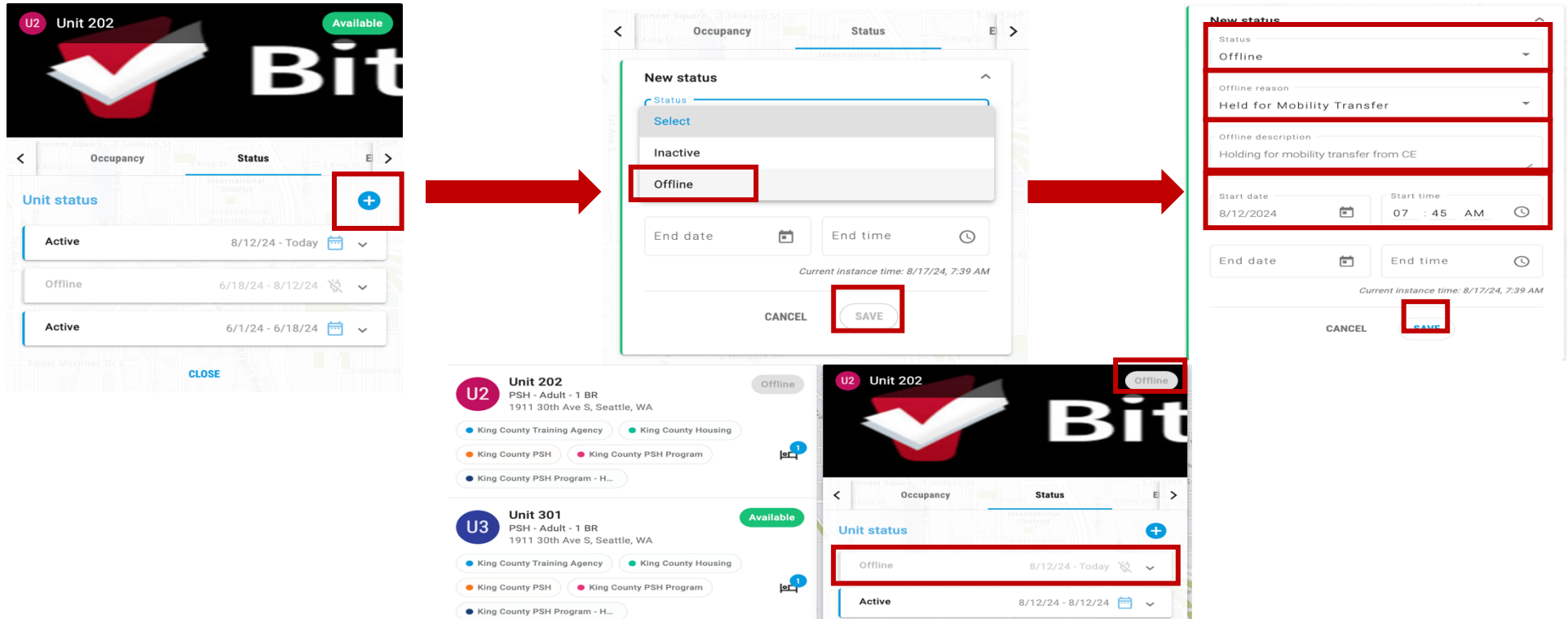
3. Identify the building/unit you wish to edit the status of and navigate to the status tab of the Unit card.



- 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 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.

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.

The image illustrates the process of changing a unit's status from Offline to Active through three sequential screenshots of a mobile application interface.

Screenshot 1 (Left): Shows the 'Unit status' tab for Unit 202. The current status is 'Offline' (8/12/24 - Today). An 'Edit status' button is highlighted with a red box. Below the current status, a list of status history is visible, including 'Active' (8/12/24 - 8/12/24), 'Offline' (6/18/24 - 8/12/24), and 'Active' (6/1/24 - 6/18/24).

Screenshot 2 (Middle): Shows the 'Edit status' form. The 'Status' is set to 'Offline'. The 'Offline reason' is 'Held for Mobility Transfer'. The 'Offline description' is 'Holding for mobility transfer from CE'. The 'Start date' is 8/12/2024 and the 'Start time' is 07:45 AM. The 'End date' is 8/16/2024 and the 'End time' is 09:00 AM. A red box highlights the 'End date' and 'End time' fields. A 'SAVE' button is highlighted with a red box.

Screenshot 3 (Right): Shows the 'Unit status' tab after the change. The current status is 'Active' (8/16/24 - Today). A 'CONFIRM' button is highlighted with a red box. Below the current status, the status history is updated to include 'Offline' (8/12/24 - 8/16/24).

Informational Message: A message box states: "The Offline End Date is set to 8/16/2024 09:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 8/16/2024 09:00 AM if there are no future date unit status records that begin on that date." A 'CONFIRM' button is highlighted with a red box.

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

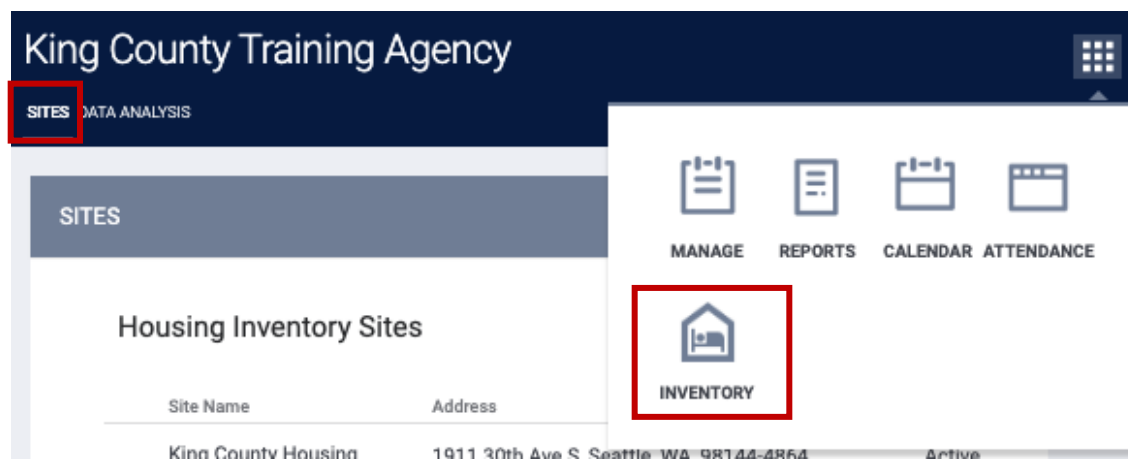
- e. Gender Specific

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.



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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”.

The screenshot shows the 'SITES' management interface. On the left, a table titled 'Housing Inventory Sites' lists three sites. The first site, 'King County Housing', has an edit icon and an 'Edit' button highlighted with a red box. The table columns are 'Site Name', 'Address', and 'Status'. On the right, a sidebar titled 'Site Categories' shows 'Administrative' and 'Housing Inventory', with 'Housing Inventory' highlighted by a red box.

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.

The screenshot shows the 'KING COUNTY HOUSING: BUILDINGS' interface. On the left, a table lists one building, 'King County PSH', with an edit icon and an 'Edit' button highlighted by a red box. The table columns are 'Building Name', 'Description', and 'Status'. On the right, a sidebar titled 'Site Resources' shows 'Overview', 'Programs & Projects 1', 'Buildings & Units 1', and 'Funding Sources 0', with 'Buildings & Units 1' highlighted by a red box.

Building Name	Description	Status
King County PSH		Active

Site Resources

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

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- 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**

- 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

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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.

The screenshot displays the 'UNIT CONFIGURATIONS' section of the HMIS interface. It is divided into three main areas: 'Current Configuration', 'Upcoming Configurations', and 'Available Configurations'. The 'Current Configuration' table shows a single entry: 'PSH - Adult - 1 BR' with 1 bed, starting on 01/01/2023, under the 'King County PSH Program'. The 'Upcoming Configurations' section is currently empty, showing 'No results found'. The 'Available Configurations' section, highlighted with a red border, contains one entry: 'PSH Adult - 1 BR' with 3 beds, also under the 'King County PSH Program'. A modal window titled 'ASSIGN UNIT CONFIGURATION' is open, featuring a date picker for 'As Of Date' (set to August 2024) and a 'SAVE CHANGES' button. A large red arrow on the left points from the 'Available Configurations' table towards the 'Upcoming Configurations' section, indicating the drag-and-drop action.

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

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

Processing a Coordinated Entry Referral

When would you do this?

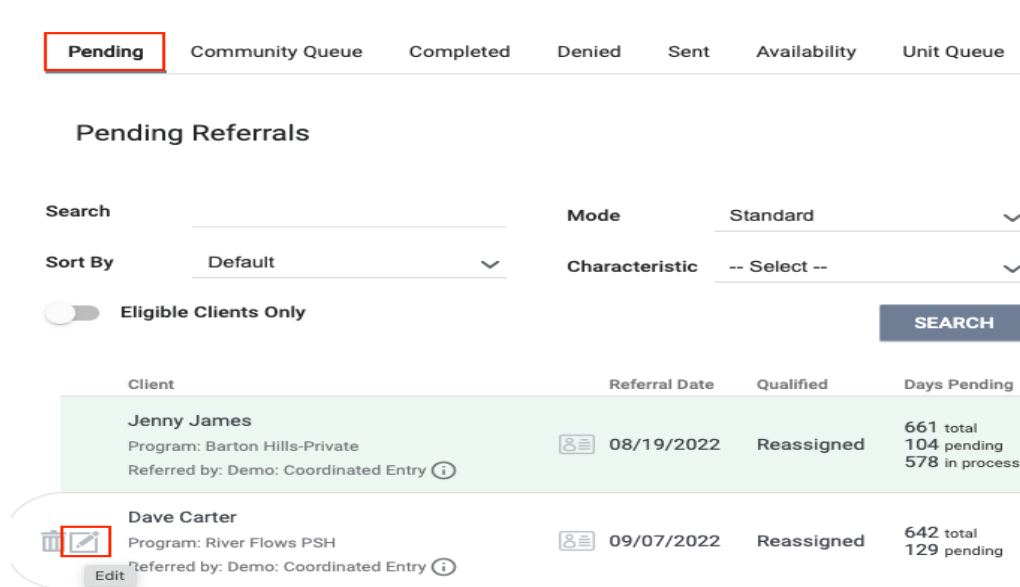
You will process referrals from Coordinated Entry for sites/buildings/units that have been indicated as participating in Coordinated Entry. Please refer to Editing Building or Unit Attributes of this manual for more information on this.

How to Process a Coordinated Entry Referral

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

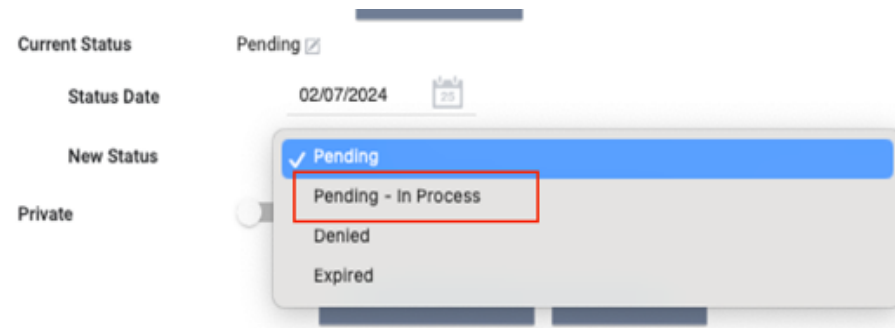


2. Go to the Pending Tab. Click Edit next to the applicable client.



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3. Update Status to Pending-In Process.
 - a. If it's determined client is ineligible, update referral status Denied.



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.

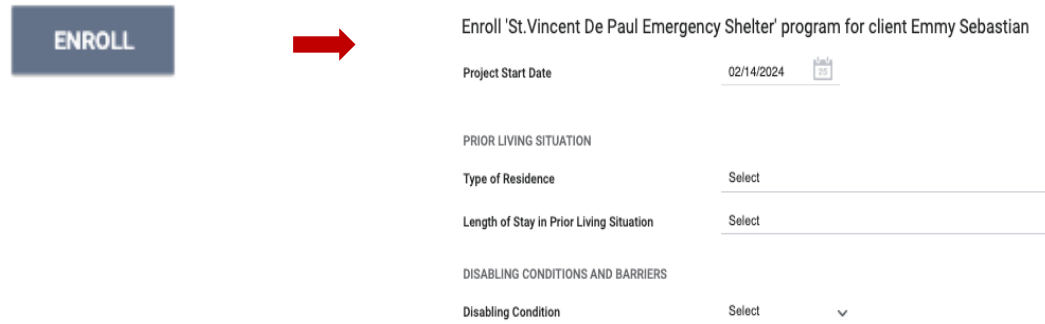


6. Ensure "Program Placement a result of Referral provided by..." toggle is enabled.
 - a. Turn on toggle for household members who will be living with the head of household.



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7. Click Enroll and complete the enrollment Screen.



The diagram illustrates the process of clicking the 'ENROLL' button to access the enrollment screen. The enrollment screen is titled 'Enroll 'St.Vincent De Paul Emergency Shelter' program for client Emmy Sebastian'. It contains several fields for data entry:

- Project Start Date:** 02/14/2024 (with a calendar icon)
- PRIOR LIVING SITUATION:**
 - Type of Residence:** Select
 - Length of Stay in Prior Living Situation:** Select
- DISABLING CONDITIONS AND BARRIERS:**
 - Disabling Condition:** Select (with a dropdown arrow)

8. Unit assignment will happen automatically.

Enrollment	History	Assessments	Notes	Files	Units/Beds	Forms	× Exit
					Unit	Start Date	End Date
					Unit 004 Fairway Motel, Fairway Motel	07/13/2023 12:00 AM	

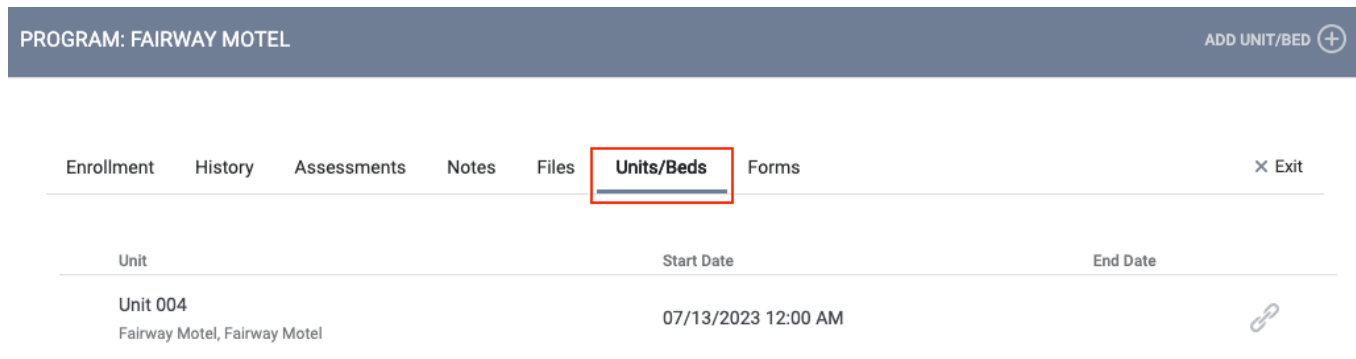
Complete a Unit Transfer

When would you do this?

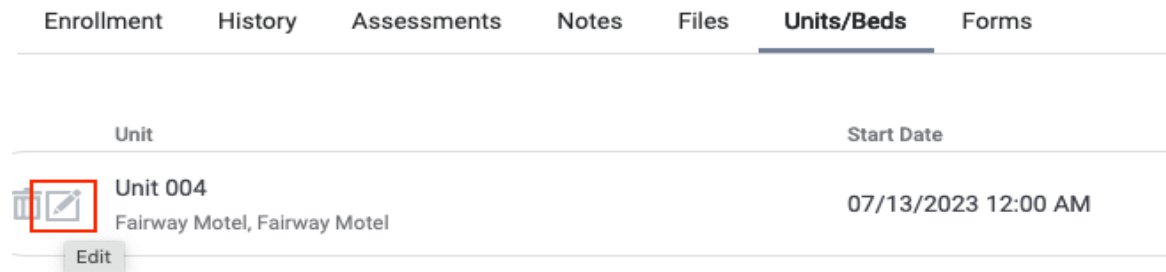
Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.

How to Complete a Unit Transfer

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



2. Click edit next to the current unit.



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3. Add an End Date to the Current Unit.
 - a. The Unit End Date can be in the past, present or future.

The screenshot shows the 'EDIT UNIT' form with a date picker open. The 'Start Date' is set to 07/01/2024 9:00 AM and the 'End Date' is set to 08/20/2024 12:00 AM. The date picker is for August 2024, showing a calendar grid with the 20th highlighted. The 'Hour' is set to 12 AM and the 'Minute' is set to 00. A 'Done' button is highlighted with a red box.

4. Once you have ended the current Unit Stay, you must assign a New Unit to the Client by selecting “Add Unit/Bed.”

The screenshot shows the 'ADD UNIT/BED +' button highlighted with a red box. Below it is a table with columns for Unit, Start Date, and End Date. The table contains one row for 'Bed 004' at 'King County Shelter, King County Emergency Shelter' with a start date of 07/01/2024 9:00 AM and an end date of 08/06/2024 12:00 AM.

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

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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 08/20/2024 8:45 AM 🕒

End Date 🕒

Eligibility Override

Eligible For Partial Dates

Available Units/Beds Select... ▾

- Client Profile Only
 - Bed 004 (King County Shelter, King Count

ADD **CANCEL**