



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

Edit Unit Status From the Inventory Map

When would you do this?
Understanding Active to Offline Unit Status
Understanding Offline to Active Unit Status
How to Edit a Unit Status from the Inventory Map
How to Change a Unit Status from Active to Offline
How to Change a Unit Status from Offline to Active

Update a Unit Configuration Type

When would you do this?
Understanding Unit Configuration Types
How to Update a Unit Configuration Type

Processing a Coordinated Entry Referral

When would you do this?
How to Process a Coordinated Entry Referral

Complete a Unit Transfer

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.

IT'S A GREAT DAY FOR TRAINING!!!

IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.

Clients

Search for a client

Showing recently accessed clients. Use the search bar above to find other clients.

Client	DOB	SSN	Household Members	Updated by
TL Test, I Am A (They/Them/Theirs) E0622F260	9/1/95 Age: 30	# 4444	Individual client No household members	LS Lauryn Searles System - Do Not Remove
TM Test, Minor AE0A4BE11	1/1/10 Age: 16	# 5556	Individual client No household members	LS Lauryn Searles System - Do Not Remove
TA Test, Alison D30988830	1/1/86 Age: 40	# 0000	Individual client No household members	AW Alison Wilson System - Do Not Remove
HH Horizon, Harry 5BE4C84AB	1/1/88 Age: 38	# 3456	Individual client No household members	LS Lauryn Searles System - Do Not Remove
BT Baby, Test E55970009	1/1/15 Age: 11	# 2222	Individual client No household members	AA Admin Admin System - Do Not Remove

11

Active enrollments

1

Status due

0

Case manager

0

Navigator

KC Test Agency

SITES

DATA ANALYSIS

SITES

ADD NEW SITE

Housing Inventory Sites

Site Name	Address	Status
-----------	---------	--------

Site Categories

Administrative

Housing Inventory

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
Edit	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 Building Attributes.

KING COUNTY HOUSING: BUILDINGS

	Building Name	Description	Status
	King County PSH		Active
Edit			

Managed with Clarity Human Services

Site Resources

Overview

Programs & Projects 1

Buildings & Units 1

Funding Sources 0

MODIFY BUILDING

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 form area contains the following fields:

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

The right sidebar, titled 'Building Resources', shows a navigation menu with the following items:

- Overview
- Programs & Projects 1
- Funding Sources 0
- Unit Configuration Type 1
- Units 8** (highlighted with a red 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	▼
Unit 102	PSH - Adult - 1 BR	1	Available	▼



Edit

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

IT'S A GREAT DAY FOR TRAINING!!!
IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system **MUST** be fictitious for security purposes.

Clients

Search for a client

Showing recently accessed clients. Use the search bar above to find other clients.

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11

 Active enrollments

1

 Status due

0

 Case manager

0

 Navigator

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

Search Unit Name/Address Availability Agency Site Building

Inventory

Unit Name/Type	Building	Status
test_unit_01	test_building	Available
test_unit_02	test_building	Available
test_unit_2	test_building	Available
test_UCT_01	test_UCT_01	Available

test_unit_01

Available

Details

Occupancy

Status

Overview

Name

 test_unit_01

Type

 test_UCT_02

Agency

 KC Test Agency

Site

 Test

Building

 test_building

Program

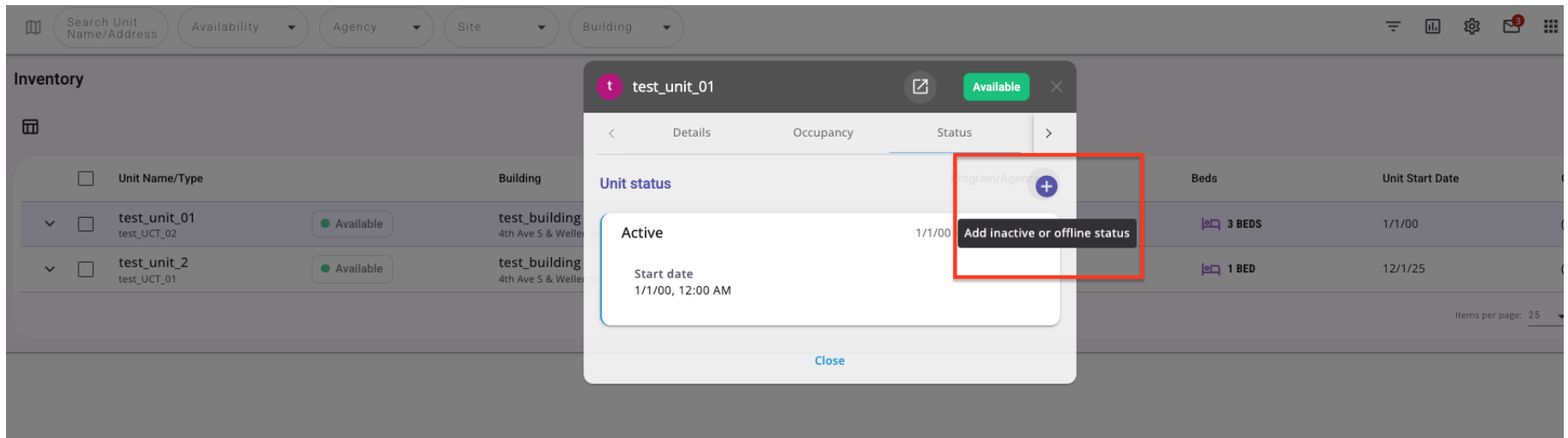
 Emergency Shelter Test

Beds

 3

More information

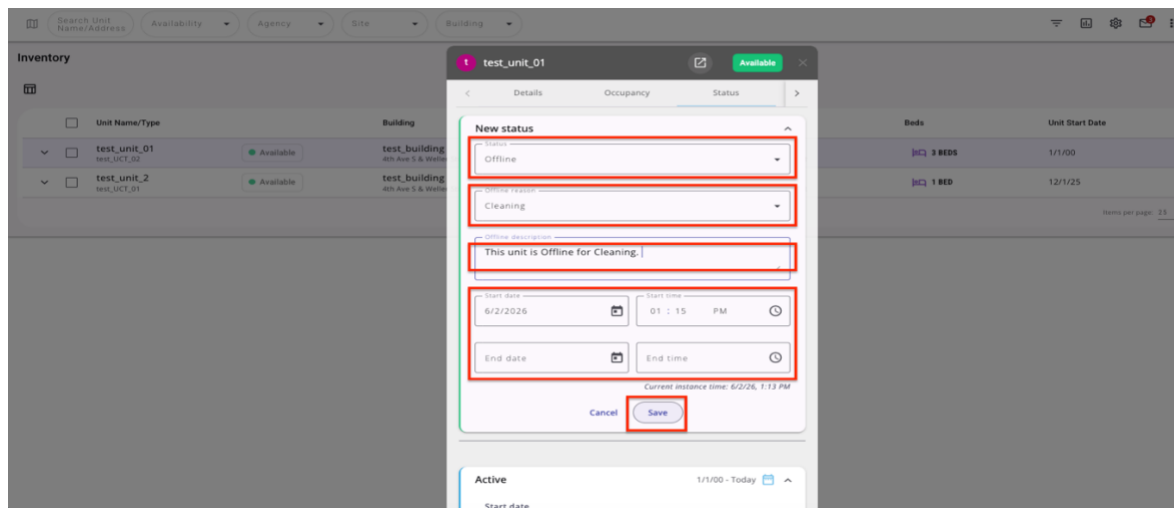
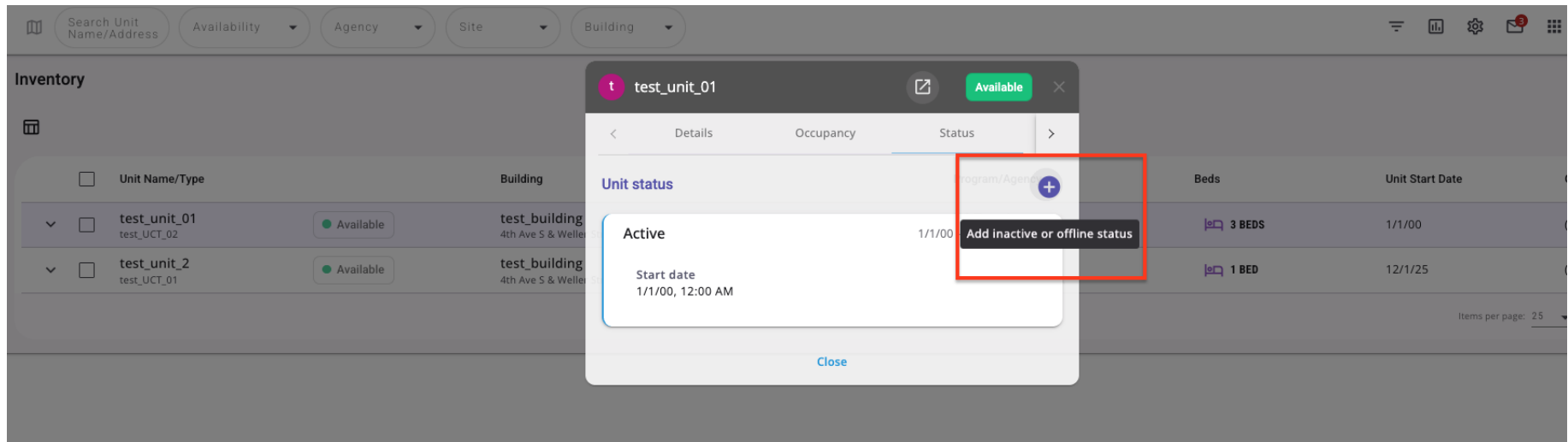
Close



- 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 screenshot shows a software interface for managing units. In the background, there is an 'Inventory' table with columns for 'Unit Name/Type', 'Building', 'Status', 'Beds', and 'Unit Start Date'. Two units are listed: 'test_unit_01' and 'test_unit_2', both with a status of 'Available'. A modal window is open for 'test_unit_01', showing the 'Status' tab. The modal has a title bar with 'test_unit_01' and an 'Available' button. Below the title bar are tabs for 'Details', 'Occupancy', and 'Status'. The 'Status' tab is active, showing 'Unit status' and 'Program/Agency'. The current status is 'Offline', with a start date of '2/1/26 - Today'. A red box highlights an edit icon (a pencil) next to the status. Below the status, there are fields for 'Start date' (2/1/26, 1:15 PM), 'Offline reason' (Cleaning), and 'Offline description' (This unit is Offline for Cleaning.). At the bottom of the modal, there is a section for 'Active' status, showing a date range of '1/1/00 - 2/1/26' and a dropdown arrow. A 'Close' button is at the bottom of the modal.

Unit Name/Type	Building	Status	Beds	Unit Start Date
test_unit_01 test_UCT_02	test_building 4th Ave S & Welle	Available	3 BEDS	1/1/00
test_unit_2 test_UCT_01	test_building 4th Ave S & Welle	Available	1 BED	12/1/25

Search Unit Name/AddressAvailabilityAgencySiteBuilding

Inventory

Unit Name/TypeBuilding

test_unit_01test_UCT_02Availabletest_building 4th Ave S & Welles

test_unit_2test_UCT_01Availabletest_building 4th Ave S & Welles

Unit status

Offline2/1/26 - 6/1/26

StatusOffline

Offline reasonCleaning

Offline descriptionThis unit is Offline for Cleaning.

Start date2/1/2026Start time01 : 15 PM

End date6/1/2026End time12 : 00 AM

Current instance time: 6/2/26, 1:20 PM

CancelSave

BedsUnit Start Date

3 BEDS1/1/00

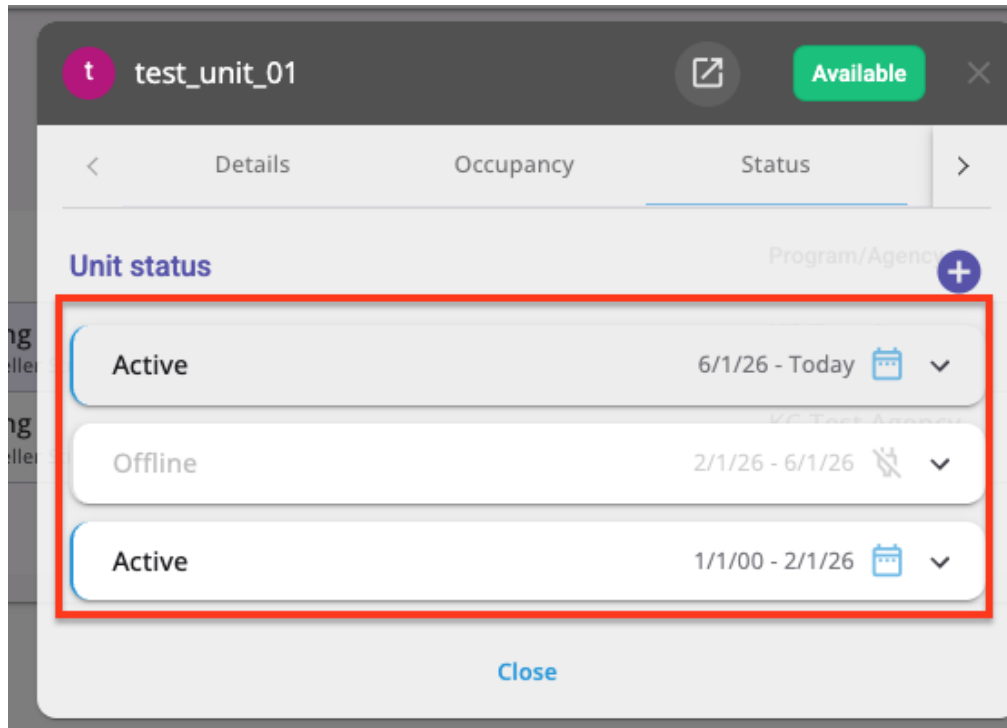
1 BED12/1/25



The Offline End Date is set to 6/1/2026 12:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 6/1/2026 12:00 AM if there are no future date unit status records that begin on that date.

Back

Confirm



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

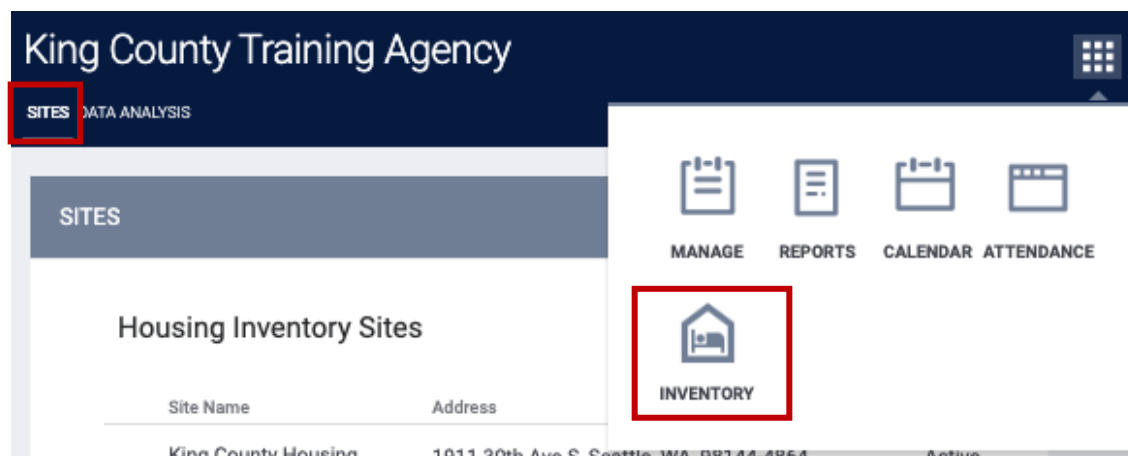
While you can apply currently active Configuration Types, you cannot create new Unit Configuration Types. There have been many Unit Configuration Types created during the

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
Edit	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
Edit			

Managed with Clarify Human Services

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.

The screenshot displays the 'UNIT CONFIGURATIONS' interface. At the top, there's a header 'UNIT CONFIGURATIONS'. Below it, a section titled 'Current Configuration' contains a table with the following data:

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

Below this is the 'Upcoming Configurations' section, which is currently empty. A modal titled 'ASSIGN UNIT CONFIGURATION' is open, showing an 'As Of Date' field with a calendar icon, a 'SAVE CHANGES' button, and a calendar for August 2024. The calendar shows the 19th as the selected date. A red box highlights the date selection area. A large red curved arrow points from the 'Available Configurations' section at the bottom to the 'Upcoming Configurations' section.

The 'Available Configurations' section at the bottom contains a table with the following data:

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

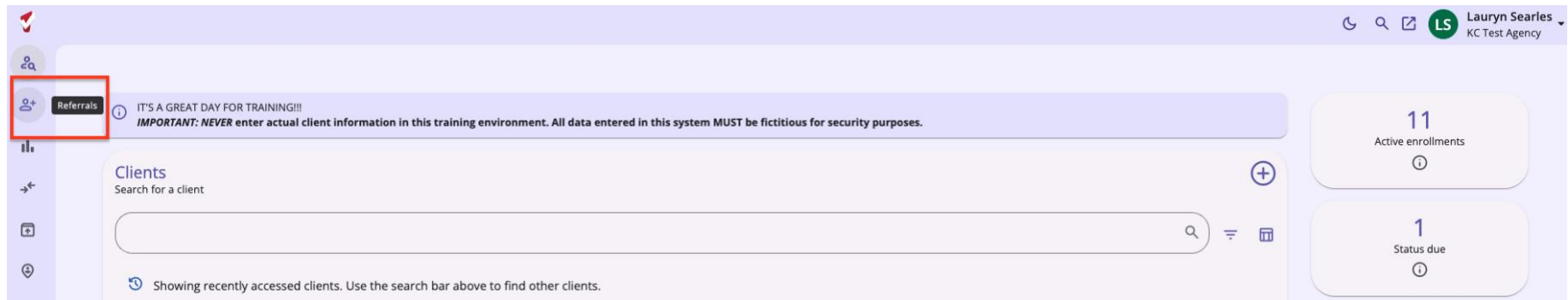
Processing a Coordinated Entry Referral

When would you do this?

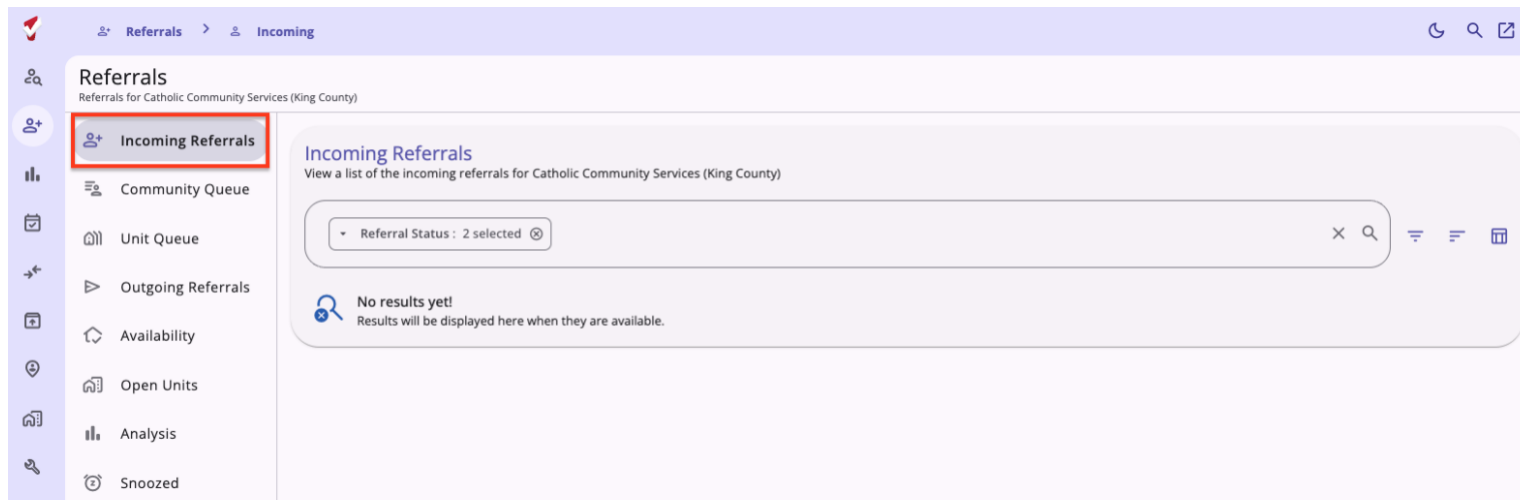
You will process referrals from Coordinated Entry for sites/buildings/units that have been indicated as participating in Coordinated Entry. Please refer to Editing Building or Unit Attributes of this manual for more information on this.

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 Incoming Tab. Click Edit next to the applicable client.



3. Update Referral Status.
 - a. Click into the Referral, and select the "Edit" button.

Referrals

Referrals for Laurn Test

Program Referral

Reservations Test RRH referral for Laurn Test

Pending

Check-In View Client

Referral

Edit referral details

Referred Unit
Reservation Test Unit 06

Referred Program
Reservations Test RRH

Referred To Agency
Laurn Test

Referring Agency
Laurn Test

Edit

b. Scroll down to the “Current Status” section of the Referral, and update the Status accordingly

- i. If it’s determined client is ineligible (client did not meet eligibility requirements, client declined 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.

Referrals

Reservations Test RRH (649)

Referrals

Referrals for Lauryn Test

Incoming Referrals

Community Queue

Unit Queue

Outgoing Referrals

Availability

Open Units

Analysis

Snoozed

<<

>>

Referred To Agency
Lauryn Test

Referring Agency
Lauryn Test

Referred Date *
05/07/2026 12:15 PM

Days Pending
26

Qualified
No

Staff Home Agency
System - Do Not Remove

Referred by Staff
Lauryn Searles

Case Manager
Select

Last Activity
2026-05-07 12:00:25

Current Status *
Pending
Pending
Denied
Expired
Pending - In Process

4. To “complete” a referral, enroll the client into the appropriate program by navigating to the client’s Program tab

The screenshot shows a web application interface for a client named "I Am A Test". The top navigation bar includes "Client Search", "I Am A Test", and "Profile". The left sidebar contains various icons and a list of tabs: Profile, Privacy, Household, History, Programs (highlighted with a red box), Services, Assessments, Care Team, Notes, Alerts, Files, Forms, Contact, Location, Referrals, and Restrictions. The main content area displays the client's profile information, organized into sections.

I Am A Test
You are currently viewing the Client Record pages for I Am A Test.

I Am A Test
Client profile information

Social Security Number ***-**-4444	Quality of SSN Full SSN Reported
First name I Am A	Last name Test
Middle name No value	Suffix None
Quality of Name Full name reported	Quality of DOB Full DOB Reported
Date of Birth 09/01/1995	Age 30
Consent Refused No	
Alternate Client ID and/or Also Known As and/or Alias No value	
Gender Non-Binary	
Pronouns They/Them/Theirs	
Race and Ethnicity Asian or Asian American	
Additional Race and Ethnicity Detail No value	
U.S. Federally Recognized Tribes No	
Federally Recognized Tribe No value-	
First Nations Tribes No	

5. Click the dropdown next to the applicable program.

Add program enrollment

1

Select program

Available Programs

Select the program for the enrollment

Name	
▼ TP	Test PSH
▼	

Pending Referral (Referral date: 6/3/2026)

Pending Referral

Sent by: King County Regional Homelessness Authority - CEA

Date: 06/03/2026

Status: Pending

< >

Next

6. Review the "Program Placement a result of Referral provided by..." window, and select "Next".

Add program enrollment ✕

 Select program

2

 Set Program Placement

Program Placement a result of Referral to Unit 03 provided by King County Regional Homelessness Authority - CEA

Next

7. Click Enroll and complete the enrollment Screen

New Client Program

Create client program for Alison Test

Please ask the questions in the order below assuring that the domestic violence questions are asked first.

It is best practice to complete program enrollment with adult household members separately.

Program Date *

06/16/2026



MM/DD/YYYY

Domestic Violence Inquiry

Survivor Of Domestic Violence: Has the individual/client experienced a past or current relationship of any type that broke down or was unhealthy, controlling and/or abusive? (This includes domestic violence, dating violence, sexual assault, and stalking) *

No



Translation Assistance Needed

Translation Assistance Needed *

No



Prior Living Situation

What was the individual/client's type of residence immediately prior to program enrollment? *

Data not collected



Select the City of the Prior Residence *

8. If the client physically moves into the unit on the same day as the Program Enrollment, the unit assignment will happen automatically. If you are completing the Program Enrollment prior to the client physically moving in, Save the Program Enrollment without an Initial Occupancy Start Date. When the client does move in, “Add A Unit Connection” via the Units/Bed tab. Learn more about the Initial Occupancy Start Date via [these training resources](#).

The screenshot shows a software interface for managing client information. On the left, a sidebar contains navigation icons. The main area displays client details for 'Joy Smith' and 'Testing RRH (12811)'. A red box highlights the 'Units/Beds' tab in the top navigation bar. On the right, a modal titled 'Add a Unit/Bed Occupancy' is open. This modal contains the following fields and options:

- Unit/Bed Occupancy**: Assigning occupancy for Joy Smith
- Start Date & Start Time ***: 06/22/2026, 1:15 PM
- End Date & End Time**: / / , Time
- Eligibility Override**: ☐
- Include Partially Available Units**: ☐
- Include Group Members**: ☐
- Available Units / Beds ***: Select Unit / Bed, Unit 02 (Testing RRH)1
- Buttons**: Cancel, Save

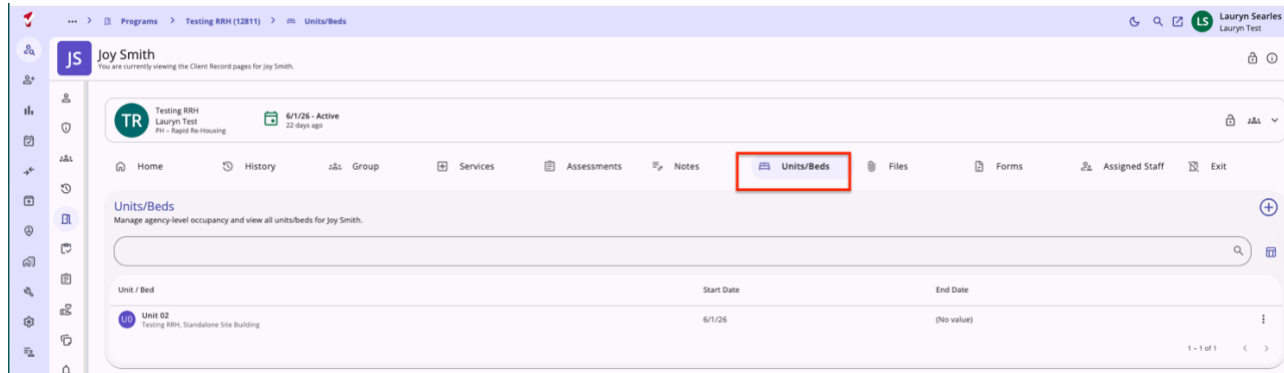
Complete a Unit Transfer

When would you do this?

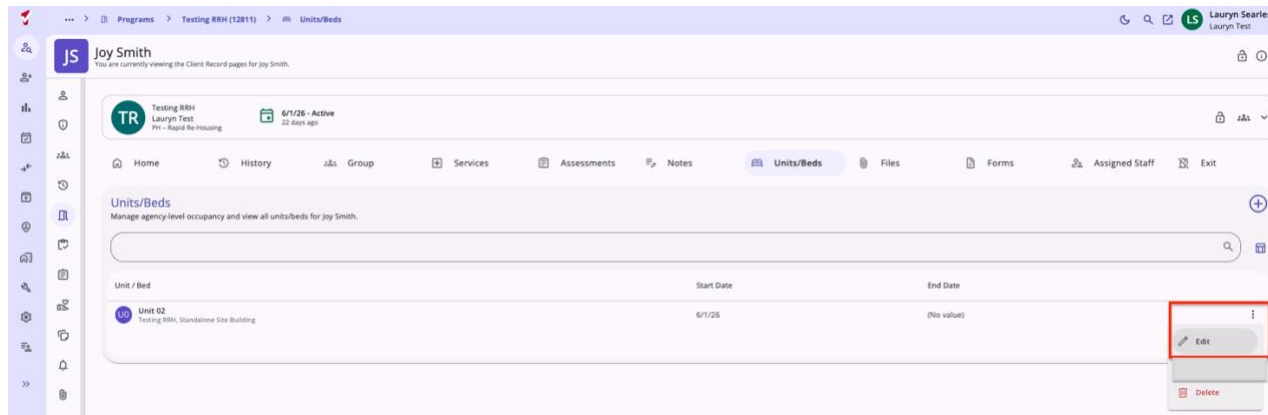
Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.

How to Complete a Unit Transfer

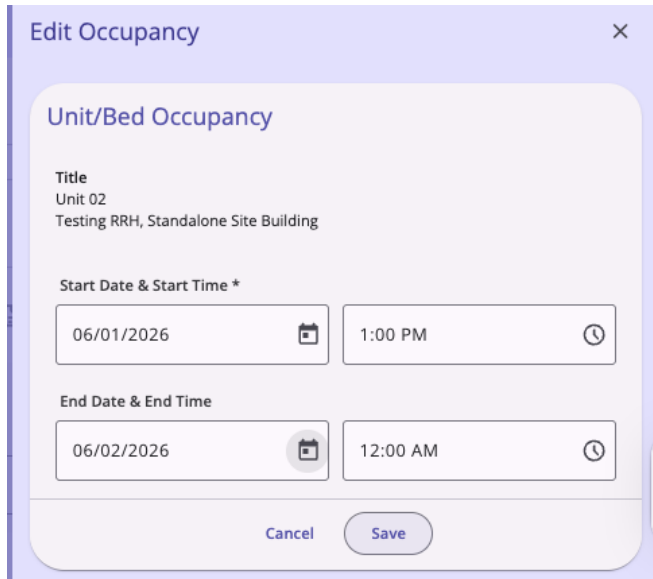
1. From the Program Enrollment, navigate to the Units/Beds Tab.



2. Click edit next to the current unit.



3. Add an End Date to the Current Unit.
 - a. The Unit End Date can be in the past, present or future.
4. Once you have ended the current Unit Stay, you must assign a New Unit to the Client by selecting “Add Unit/Bed.”
5. Assign the Client to the New Unit.
 - a. The Start Date should be the first night the client will sleep in the unit.



Edit Occupancy [Close]

Unit/Bed Occupancy

Title
Unit 02
Testing RRH, Standalone Site Building

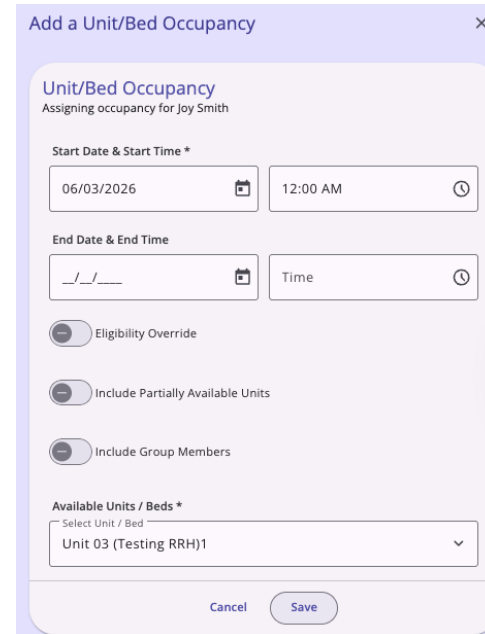
Start Date & Start Time *

06/01/2026 [Calendar Icon] 1:00 PM [Clock Icon]

End Date & End Time

06/02/2026 [Calendar Icon] 12:00 AM [Clock Icon]

[Cancel](#) [Save](#)



Add a Unit/Bed Occupancy [Close]

Unit/Bed Occupancy
Assigning occupancy for Joy Smith

Start Date & Start Time *

06/03/2026 [Calendar Icon] 12:00 AM [Clock Icon]

End Date & End Time

__/__/____ [Calendar Icon] Time [Clock Icon]

☐ Eligibility Override

☐ Include Partially Available Units

☐ Include Group Members

Available Units / Beds *

Select Unit / Bed
Unit 03 (Testing RRH)1 [Dropdown Arrow]

[Cancel](#) [Save](#)