



# 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](mailto:kcsupport@bitfocus.com) | Chat widget directly in Clarity
- Stay apprised HMIS Inventory Events that may be occurring: [kingcounty.bitfocus.com/kc-events](https://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
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.

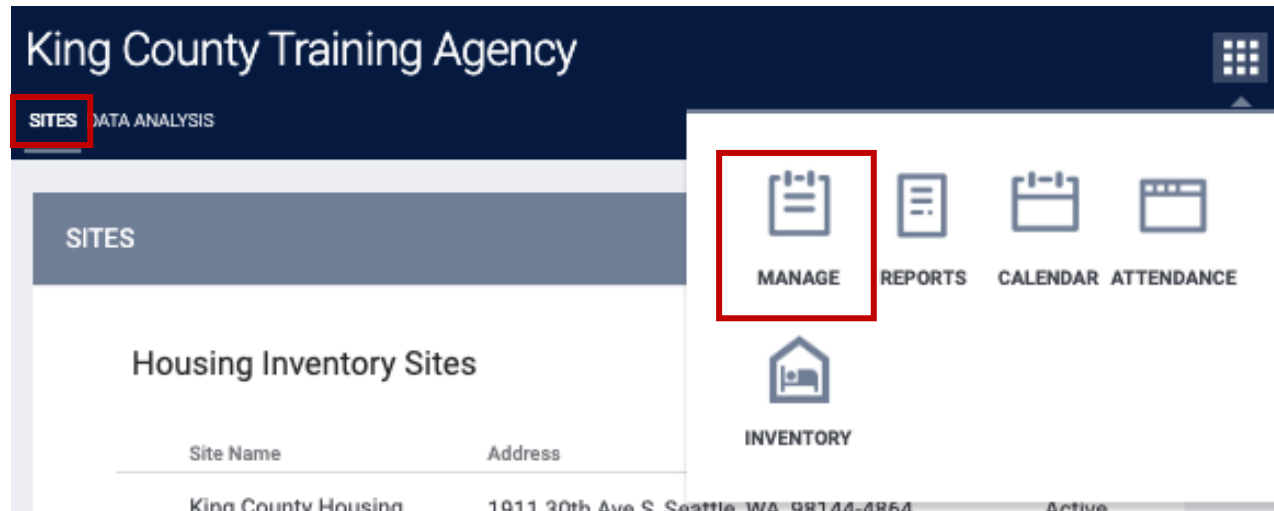
- When “*No units participate in CE*” is selected at the building level, unit non-participation is assumed, and you do not have to specify this attribute at the unit level.

## Important Reminders:

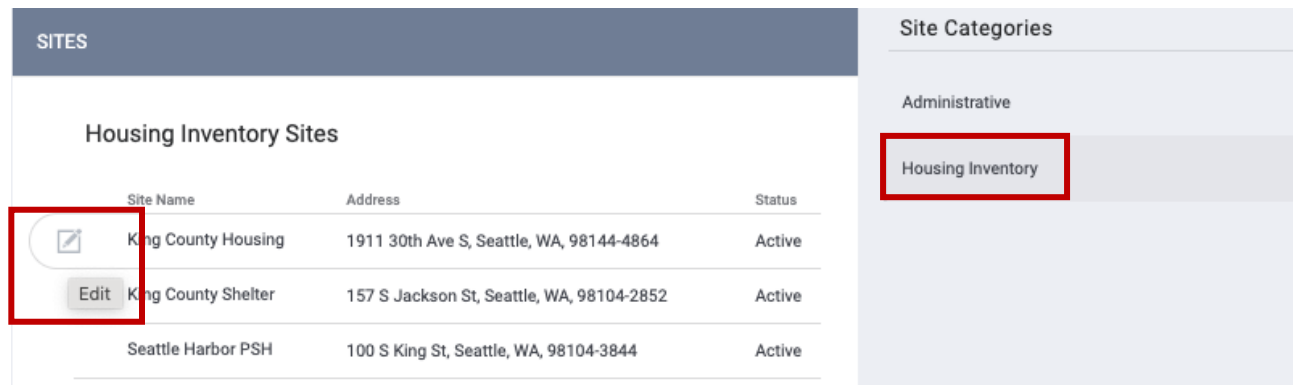
1. This designation must align with funder requirements. The default selection in Clarity for the Building CE Participation attribute is “Select.” You must make sure the Building CE Participation is accurate.
2. **For Rapid Re-Housing and Scattered Site Programs:** These programs do not have Buildings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

The screenshot displays a web application interface for managing buildings. At the top, a dark blue header reads "KING COUNTY HOUSING: BUILDINGS". Below this is a table with columns for "Building Name", "Description", and "Status". A single row is visible for "King County PSH" with a status of "Active". An "Edit" button, represented by a pencil icon, is located to the left of the row and is highlighted with a red box. To the right of the table is a sidebar titled "Site Resources" containing a list of menu items: "Overview", "Programs & Projects 1", "Buildings & Units 1" (highlighted with a red box), and "Funding Sources 0". Below the table, a small text reads "Managed with Clarity Human Services". The bottom section of the interface is a "MODIFY BUILDING" form with the following fields: "Building Name" (King County PSH), "Start Date" (01/01/2023 with a calendar icon), and "Status" (Active with a dropdown arrow).

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 

# 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 attributes for 'King County PSH':

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




The right sidebar, titled 'Building Resources', lists several categories: Overview, Programs & Projects (1), Funding Sources (0), Unit Configuration Type (1), and Units (8). The 'Units' link is 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
 <b>Unit 101</b>	PSH - Adult - 1 BR	1	Available

**Unit 101** **MODIFY UNIT**

<b>Unit Name</b>	Unit 101
<b>Unit Start Date</b>	01/01/2023 
<b>Status</b>	Active
<b>Status Start Date</b>	01/01/2023 12:00 AM 
<b>Status End Date</b>	__/__/__ :__ 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:

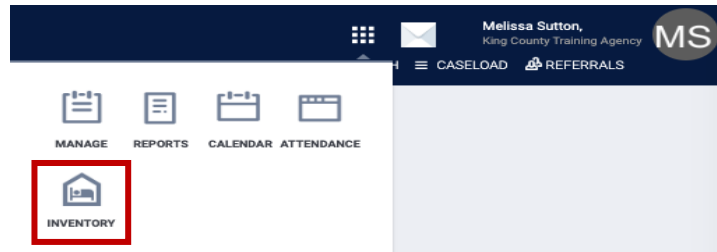
1. You need to end an auto Offline status early
2. You need to end a manually set Offline status.

## Important Reminders:

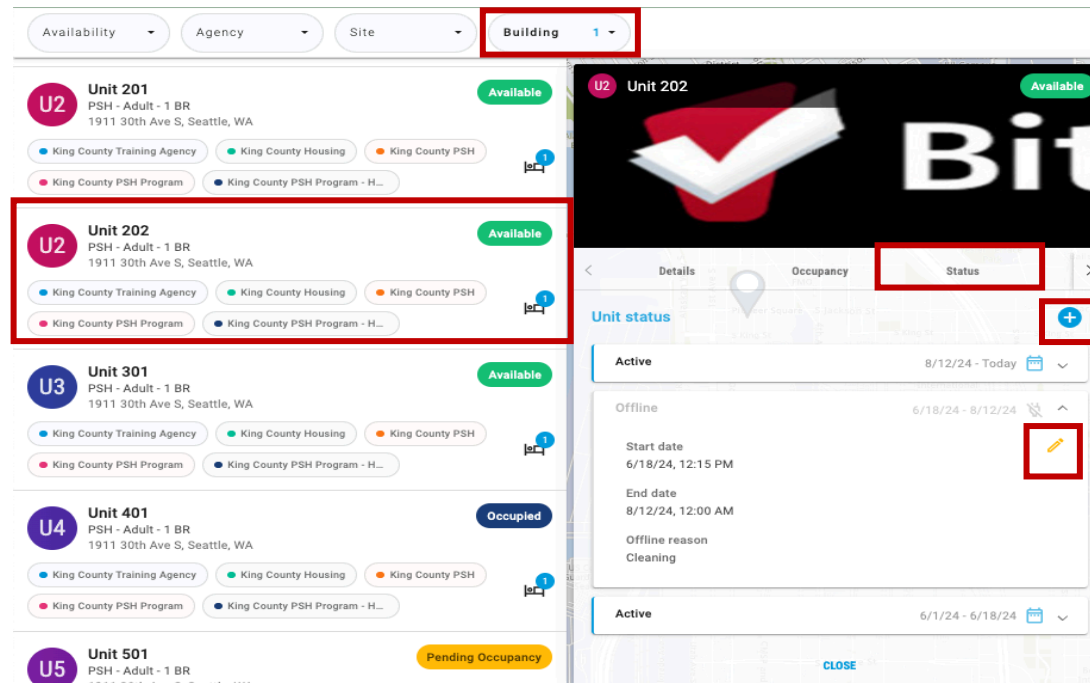
1. When a client exits from an enrollment, the associated unit immediately becomes available for referral unless you manually change the unit status to Offline, except for PSH programs.
2. **For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can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

The image illustrates the process of changing a unit's status from Active to Offline through a mobile application. It consists of four sequential screenshots connected by red arrows:

- Unit Card:** Shows 'Unit 202' with a status of 'Available'. A red box highlights a plus icon in the 'Status' tab.
- New Status Modal:** Shows the 'New status' modal with 'Offline' selected. A red box highlights the 'Offline' option.
- Offline Reason and Date:** Shows the 'New status' modal with 'Offline' selected, 'Held for Mobility Transfer' as the reason, and '8/12/2024' as the start date. A red box highlights the 'SAVE' button.
- Unit Card:** Shows 'Unit 202' with a status of 'Offline'. A red box highlights the 'Offline' status.

Below the main sequence, there is an additional screenshot showing the 'Unit status' list with 'Offline' selected for '8/12/24 - Today'. A red box highlights the 'Offline' status in the list.

**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 consists of three screenshots from a mobile application interface, illustrating the steps to change a unit's status from Offline to Active.

**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, there is a list of status history: '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 'End date' field is set to 8/16/2024 and the 'End time' field is set to 09:00 AM. Both fields are highlighted with a red box. A 'SAVE' button is also highlighted with a red box.

**Screenshot 3 (Right):** Shows a confirmation dialog box. The text reads: "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." Below the text are 'BACK' and 'CONFIRM' buttons, with 'CONFIRM' highlighted in 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

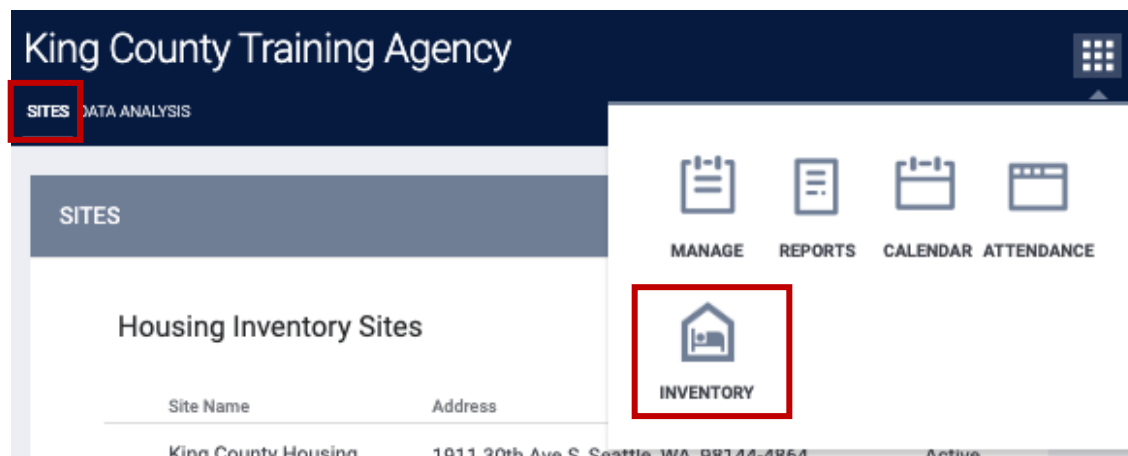
- e. Gender Specific

## 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.



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 a web interface for managing sites. The main header is 'SITES'. Below it, there's a section titled 'Housing Inventory Sites' which contains a table with three rows of site information. The first row is 'King County Housing' with address '1911 30th Ave S, Seattle, WA, 98144-4864' and status 'Active'. The second row is 'King County Shelter' with address '157 S Jackson St, Seattle, WA, 98104-2852' and status 'Active'. The third row is 'Seattle Harbor PSH' with address '100 S King St, Seattle, WA, 98104-3844' and status 'Active'. A red box highlights the edit icon and the 'Edit' button for the 'King County Shelter' row. To the right, there's a sidebar titled 'Site Categories' with a sub-section 'Administrative' containing a red box around the 'Housing Inventory' category.

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 a web interface for managing buildings. The main header is 'KING COUNTY HOUSING: BUILDINGS'. Below it, there's a table with one row of building information: 'King County PSH' with status 'Active'. A red box highlights the edit icon and the 'Edit' button for this row. To the right, there's a sidebar titled 'Site Resources' with a sub-section 'Buildings & Units' containing a red box around the 'Buildings & Units' category with a '1' next to it. Other categories in the sidebar include 'Overview', 'Programs & Projects' (with a '1' next to it), and 'Funding Sources' (with a '0' next to it).

Building Name	Description	Status
King County PSH		Active

**Site Resources**

Overview

Programs & Projects 1

Buildings & Units 1

Funding Sources 0

Managed with Clarity Human Services

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?

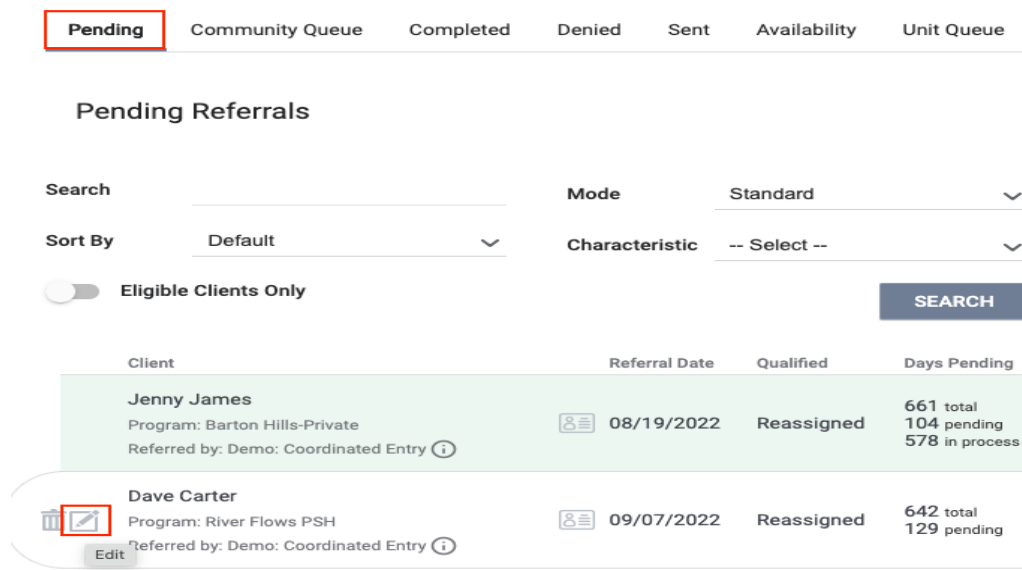
You will process referrals from Coordinated Entry for sites/buildings/units that have been indicated as participating in Coordinated Entry. Please refer to Editing Building or Unit Attributes of this manual for more information on this.

## How to Process a Coordinated Entry Referral

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



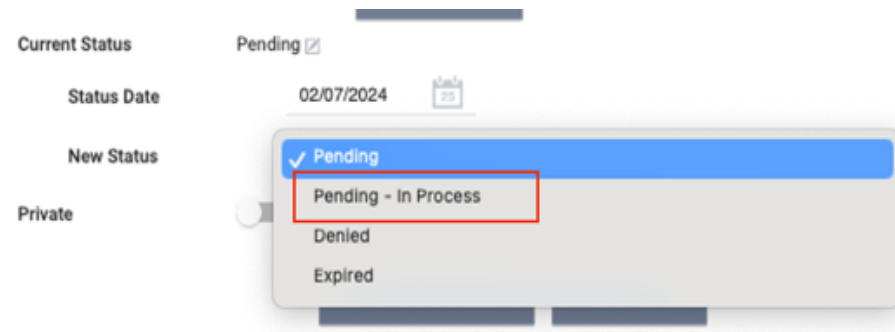
2. Go to the Pending Tab. Click Edit next to the applicable client.

A screenshot of a software interface showing the 'Pending Referrals' section. At the top, there are several tabs: 'Pending' (highlighted with a red box), 'Community Queue', 'Completed', 'Denied', 'Sent', 'Availability', and 'Unit Queue'. Below the tabs, the title 'Pending Referrals' is displayed. There are search and filter options: 'Search' (input field), 'Sort By' (dropdown menu set to 'Default'), 'Mode' (dropdown menu set to 'Standard'), and 'Characteristic' (dropdown menu set to '-- Select --'). A toggle switch for 'Eligible Clients Only' is turned off. A 'SEARCH' button is located to the right of the filters. Below the filters is a table with the following data:

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

An 'Edit' button with a pencil icon is visible below the 'Dave Carter' row, highlighted with a red box.

3. Update Status to Pending-In Process.
  - a. 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.



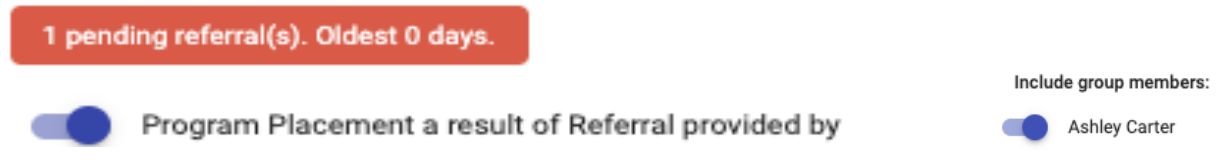
4. To accept the referral, you will complete a program enrollment by navigating to the client's Program tab.



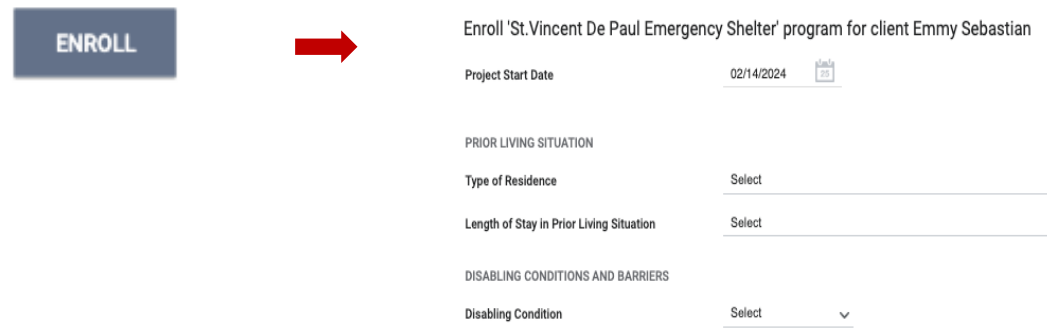
5. Click dropdown next to the applicable program.



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.



7. Click Enroll and complete the enrollment Screen.



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](#).

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.


PROGRAM: FAIRWAY MOTEL ADD UNIT/BED +

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	

2. Click edit next to the current unit.

Enrollment History Assessments Notes Files **Units/Beds** Forms

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

Edit

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

**EDIT UNIT** [Close]

**Start Date** 07/01/2024 9:00 AM [Clock]

**End Date** 08/20/2024 12:00 AM [Clock]

Current: August 2024

SAVE CHANGES

Hour: 12 AM [Dropdown]

Minute: 00 [Dropdown]

Now Done

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

PROGRAM: KING COUNTY EMERGENCY SHELTER [ADD UNIT/BED +]

Enrollment History Provide Services Notes Files **Units/Beds** Forms [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** 08/20/2024 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**