



Unit Inventory Management for the CAS in HMIS Memo Policies & Procedures Revision

Purpose: This memo outlines changes to the Coordinated Assessment System (CAS) Process and Procedures. The changes outlined in this document are intended to establish a policy for real-time unit inventory management in HMIS for CAS referral process.

Background: The CAS Committee convened on June 1, 2021 to discuss changes to the referral management process as a result of the transition of the CAS into HMIS. An important goal of the CAS is to provide effective and efficient access to the referral process for housing and services. To achieve this, CAS must have the ability to facilitate timely matching of a household to an intervention as resources become available. To that end, an effective coordinated entry system must be able to report in real time the type and quantity of resources available at any given time.

Effective February 8, 2021, the process has been that agencies exclusively utilized Spiceworks or the weekly HPL meetings to request referrals and update CAS on status of outstanding referral requests. The process is defined as a “pull referral system” meaning agencies would initiate the request for referrals by informing CAS via Spiceworks on number of vacancies (or referrals needed) to pull a referral from the HPL. In the new CAS, agencies will manage their Housing Facilities and unit availability in HMIS. Based on the unit availability, CAS will send referrals to vacancies reported by agencies using a “push referral system” meaning CAS will facilitate referrals electronically in HMIS to open units.

Proposed Changes: CAS will utilize HMIS unit management feature to check availability for housing, create a reservation, and make a referral to a housing project.

Policy: It is the policy of the Dallas and Collin County CoC shall use HMIS to inventory housing vacancies for PSH and RRH projects in CAS and to track the progress and number of placements through the referral and lease up process. Real-time tracking is dependent on housing provider agencies prompt and consistent updating of resources to include beds, units, and/or case management enrollment. The project’s unit inventory and HMIS data information must remain up to date in order for CAS to support a smooth and appropriate referral for eligible households to housing. All RRH and PSH programs are required to post vacancies in HMIS within 48 business hours of unit/bed availability. Programs must update the vacancy information in HMIS within 48 business hours of a unit/bed being filled. This information is crucial in determining what resources are available and where to send a household in need of housing. CAS will utilize the eligibility criteria provided by housing programs at the time of HMIS project setup. Programs are required to adhere to the agreed upon eligibility criteria submitted to CAS for their housing programs. Housing Providers must notify the CAS Admin of any contractual changes to housing programs that impacts program eligibility and referrals through CAS within 48 business hours of approved changes. This may include

- 1) Starting, adding to, or closing housing programs
- 2) A change in the service delivery model
- 3) Adjustments to program eligibility requirements