

# Coordinated Access Initial Written Documents Checklist

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The Canadian Alliance to End Homelessness (CAEH) has prepared this quick checklist of those documents identified in the Reaching Home level of the Coordinated Access Scorecard.

## 1. Consent, Confidentiality, and Data Sharing (see CA Scorecard 2.4)

- Client Consent Form (signed with individuals and families)
- Confidentiality and User Agreement (signed with staff who use the HMIS/Data system)
- Community Data Sharing Agreement (signed with HMIS/Data host and service providers)

## 2. Triage and Assessment (see CA Scorecard 11.1)

- Intake Policy/Protocol
  - Identifies access points
  - Includes explanation/process for entering people into the Coordinated Access system (and/or HMIS) when they connect/reconnect with an access point.
- Triage and Assessment Policy/Protocol
  - Identifies the common triage/assessment tool (e.g., a specific tool or set of tools and any additional information to be collected) that is used for all population groups experiencing homelessness (for example, youth, women fleeing violence, Indigenous peoples).
  - Outlines the triage/assessment protocols used in your community.

## 3. Housing Resources and Priorities (see CA Scorecard 13.1, 13.2 and 13.3)

- Coordinated Access Resource Inventory
- Housing Resource Eligibility Requirements (for each resource in the CA Resource Inventory)
  - Identifies for each resource in the CA resources inventory (e.g., age restrictions, health conditions, geographic location, etc.).
- Housing Resource Prioritization Policy/Protocol
  - Identifies prioritization criteria for each housing resource and the order in which they will be applied (either individually by program or by program group e.g., rapid rehousing, supportive housing).
  - Identifies that prioritization occurs from a community's priority list.
  - Identifies that factors, outside of those listed in the prioritization policy, cannot be used.

## 4. Vacancy Matching and Referral (see CA Scorecard 15.1, 15.2 and 15.4)

- Vacancy matching and referral policies/protocols
  - Clarifies how vacancies are filled from the Coordinated Access Resource Inventory according to agreed-upon prioritization and referral protocols .
  - Specifies how individual choice in housing options will be respected (allowing individuals and families to reject a referral without repercussions).
  - Includes processes specific to dealing with vacancy referral challenges, concerns and/or disagreements (including refusals of referrals).