**Coordinated Access Initial**

**Written Documents Checklist**

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)

1. **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.

1. **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.

1. **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).