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)

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).