



Halifax Coordinated Access Policy and Procedure Manual

November 2021

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Introduction

In Fall of 2017, fundamental changes were made to the way local community agencies in the Halifax Regional Municipality worked together to support individuals and families to end their experiences of homelessness. The community agreed they could better support clients if they worked together. This led to a fundamental change in service delivery – to make families and individuals central and bring necessary services to them. A Coordinated Access model was born.

A Coordinated Access System

According to Reaching Home, the Canadian federal government's homelessness strategy, all Designated Communities are required to have a Coordinated Access system. Through a Coordinated Access system individuals and families¹ who are experiencing homelessness or are at-risk of homelessness are directed to access points where trained workers use a common assessment tool to evaluate the individual or family's depth of need, prioritize them for housing support services and then help to match them to available housing. The Halifax Coordinated Access System (CAS) is designed to organize the community level response to homelessness in the Halifax Regional Municipality.

Coordinated Access fosters a consistent team approach to services and care across agencies. Unlike in traditional siloed settings, organizations work together with a standardized methodology to reduce and/or eliminate barriers that individuals and families may experience. When agencies work together in this way, clients can access the resources and support they need to secure and maintain housing without having to go from place to place to get their needs met. A system where clients are asked to do one intake also helps to reduce the impacts of trauma – clients do not have to keep retelling their story. Coordinated processes also reduce duplication of services across agencies; clients are “known” in a system rather than in a silo and the services they receive can be tracked and streamlined accordingly.

Following the structure prescribed by Reaching Home, there are five key components of Coordinated Access in Halifax:

1. **Governance:** the mechanisms and structures that provide direction for the system.
2. **Access:** the engagement points for the individual or family experiencing a housing crisis.
3. **Assessment:** the process of gathering information about an individual or family accessing the crisis system.
4. **Prioritization:** the process of determining the individual's or family's priority for housing based on information gathered through the assessment.
5. **Matching and referral:** the process whereby the individual or family is matched to and offered housing and/or housing support caseload vacancies based on project-specific eligibility, needs and preferences.

¹ The use of the words “individuals and families” in the document will be interchangeable with the word “client.” We acknowledge that individual agencies may have their own language that they use when referring to clients.

Benefits of Coordinated Access System

Throughout Canada, quality Coordinated Access systems share several features:

- A centralized database that collects and displays real-time data on clients and available housing and/or housing support caseload vacancies.
- Clearly identified access points that community can readily find.
- A common assessment process that is used across the system.
- Standardized policies and procedures.
- Resources (for example, staff) focused on ensuring that people can connect with appropriate housing and housing supports in an efficient manner.

Coordinated access systems benefit both clients and service providers:

Participants	Service Providers
The process to locate and access supports and/or services is both simplified and sped up.	Service provider roles are made clear. Unnecessary duplication of supports and services is eliminated.
Appropriate referrals are made so there is less frustration for clients and service providers. Clients are being matched to the best possible service for their needs.	Improved speed, accuracy and consistency in screening and referral process.
There is an overall reduction in the need to retell client stories. This helps to reduce stress and trauma.	Time and resources are saved, allowing staff to focus on housing and case management.
Better matching of participants to appropriate supports and services.	Support and service gaps are identified.

Community level coordination

After an individual or family in Halifax has been homeless and is unable to secure housing, they will be offered an intake into the Coordinated Access system (CAS) and, if they consent, will be added to the By-Name List (BNL). The Halifax BNL is a **real-time** list of everyone in the community that is unhoused and is looking for support with finding housing and/or access to a housing support caseload vacancy.

Coordinated Access ensures that individuals and families in this community are assessed and prioritized for support and housing opportunities according to their need and taking into consideration their fit within an agency that can best support them. The BNL tracks the inflow and outflow of homelessness and assists the community in matching the most vulnerable people with the most appropriate supports and services. In addition to streamlining service to individuals and families experiencing homelessness, the BNL can be used to track the community's progress towards ending homelessness. The data can be analyzed to highlight strengths and gaps in the system and identify where additional resources or investments would make a difference.

In the HRM, the BNL is administered by the *Affordable Housing Association of Nova Scotia (AHANS)*. AHANS is the Community Entity (CE) for the Halifax Regional Municipality with the federal Reaching Home program. The

policies and procedures related to CAS in the HRM are listed according to topic and featured at the end of each section of this manual. For quick reference, see [Appendix A](#) for a complete list of all policies.

All agencies participating in the Coordinated Access System are required to either sign a Reaching Home Contribution Agreement and/or a Memorandum of Understanding (MOU) with the CE. These documents outline agency roles, responsibilities, accountabilities and resource sharing expectations and protocols.

Concepts, Terminology and Abbreviations

Canadian Definition of Homelessness and related terms

The ***Canadian Definition of Homelessness*** defines homelessness as “*the situation of an individual, family, or community without stable, safe, permanent, appropriate housing, or the immediate prospect means and ability of acquiring it.*”

The Canadian Definition of Homelessness expands to define the following situations:

Unsheltered - Living outside (bank machines, woods, under the bridge) or living in places not intended for permanent human habitation (cars, garages, out buildings, shacks, tents).

Emergency Sheltered - Emergency overnight shelters for people who are homeless, Shelters for individuals/families affected by family violence.

Provisionally Accommodated (including Transitional and Institution) - interim housing for people who are homeless, temporary living with other people (couch surfing, staying with family, etc.), short-term rental accommodation without security of tenancy, people in institutional care with no guarantee of permanent housing upon release (hospital, corrections facilities, treatment facilities, etc.).

Hidden homeless – those living temporarily with others but without guarantee of continued residence or immediate prospects for accessing permanent housing.

People may be ***at imminent risk of homelessness*** because of precarious employment, sudden unemployment, time-limited supported housing, facing imminent eviction (eviction notice issued, tenancy hearing scheduled, tenancy hearing lost, and sheriff notice issued), violence and/or abuse (intimate partner violence, seniors, youth, racism, homophobia, transphobia, and misogyny).

Individual or families may be considered ***precariously housed*** if they lack adequate (major repairs needed, mold, lack of heating or power), affordable (paying 50% or more on rent), suitable (enough bedrooms for the size of the family) housing.

Chronic Homelessness

The Federal definition of ***chronic homelessness*** refers to individuals or families who are currently experiencing homelessness AND who meet *at least one of the following criteria*:

- They have a total of at least six months (180 days) of homelessness over the past year.
- They have recurrent experiences of homelessness over the past 3 years, with a cumulative duration of at least 18 months (546 days).

Chronic homelessness includes time spent in unsheltered locations, in emergency shelters, or staying temporarily with others without guarantee of continued residency or immediate prospects for permanent housing. Individuals leaving transitional housing or public institutions (for example health or corrections) can be

considered chronically homeless if they were experiencing chronic homelessness upon entry to transitional housing or the public institution. Chronic homelessness does not include situations where individuals have access to secure, permanent housing, whether subsidized or not.

Indigenous Homelessness

In 2017, The Canadian Observatory on Homelessness, together with elders, indigenous leaders and scholar Jesse Thistle, PhD, published the *Indigenous Definition of Homelessness in Canada*. This definition acknowledges that “*unlike the common colonialist definition of homelessness, Indigenous homelessness is not defined as lacking a structure of habitation; rather, it is more fully described through a composite lens of Indigenous worldviews. These include: individuals, families and communities isolated from their relationships to land, water, place, family, kin, each other, animals, cultures, languages and identities.*”

Further Reading:

Reframing the Discussion: An Indigenous Definition of Homelessness

Definition of Indigenous Homelessness in Canada on Homeless Hub

Complete Report: Definition of Indigenous Homelessness in Canada

Racialized homelessness

The Halifax Coordinated Access System (CAS) recognizes that racialized communities experience ongoing and disproportionate levels of poverty when compared to non-racialized communities. According to Colour of Poverty, Colour of Change, the racial justice, education, and advocacy network of Ontario, “just over 50% of people of colour households in Canada live in homes which are not affordable (leading to homelessness) and inadequate (require repair or maintenance) and unsuitable (overcrowded, among other issues). This compares to 28% of non-racialized households. In addition to poor housing conditions, Indigenous Peoples, peoples of colour and immigrants face discrimination on the basis of source of income, credit history, access to guarantors and references, racial identity, immigration status, gender and age.”² As we seek to address the root causes of homelessness within this community, there is an immediate need to acknowledge this disparity and address it within the HRM, Nova Scotia and the rest of Canada.

Further Reading:

Historic Black Nova Scotia

Policing Black Lives

Other definitions

Designated Communities

Urban communities within Canada, of which the HRM is one, that have been identified by the federal government to face significant issues with homelessness and which receive funding under *Reaching Home* to support their community homelessness plan.

Families

Any group of people who by their self-identification are a family. This unit may or may not include children.

² cop-coc-fact-sheet-9-racialized-poverty-in-housing-homelessness-2.pdf (colourofpoverty.ca)

HIFIS

Acronym - *Homeless Individuals and Families Information System*

Inflow

The measure of individuals and families entering the system, either for the first time (new) or returning from housing or inactivity.

Outflow

The measure of individuals or families who have either moved into housing or moved to the inactive list.

Permanently Housed

A family or individual is considered ‘permanently housed’ if their housing situation meets all the following criteria:

- There is no designated length of stay (i.e., it is meant to be long-term).
- They have a tenancy agreement that provides them protection under the [Residential Tenancies Act](#). This includes individuals that have moved back to a family home (i.e., family reunification).

Real-time data

Data that is actual and accurate at the time of viewing.

Reaching Home

Reaching Home is a community-based federally funded program designed to prevent and reduce homelessness by supporting the development of local solutions to homelessness. [Reaching Home](#) provides funding to Designated Communities as well as to Indigenous and rural and remote communities across Canada.

ROI

Acronym - *Release of information*

Seniors

Any single person, unattached to a family unit, that is aged 55 and over.

Singles

Any single person, unattached to a family unit, that is aged between 25-54.

Staff

For the purposes of this document, “staff” refers to the employees of CAS affiliated agencies that are carrying out the work of coordinated access and interacting with clients.

VI-SPDAT

Acronym - *Vulnerability Index Service Prioritization Assistance Tool*

Youth

Any single person, unattached to a family unit, that is aged between 18-24.

Local Abbreviations

AHANS	Affordable Housing Association of Nova Scotia
CCT	Case Conferencing Table
HRM	Halifax Regional Municipality
HSW	Housing Support Worker
ICM	Intensive Case Manager
MOSH	Mobile Outreach Street Health
MRHA	Metropolitan Regional Housing Authority
MTP	Metro Turning Point

Halifax CAS Guiding Principles

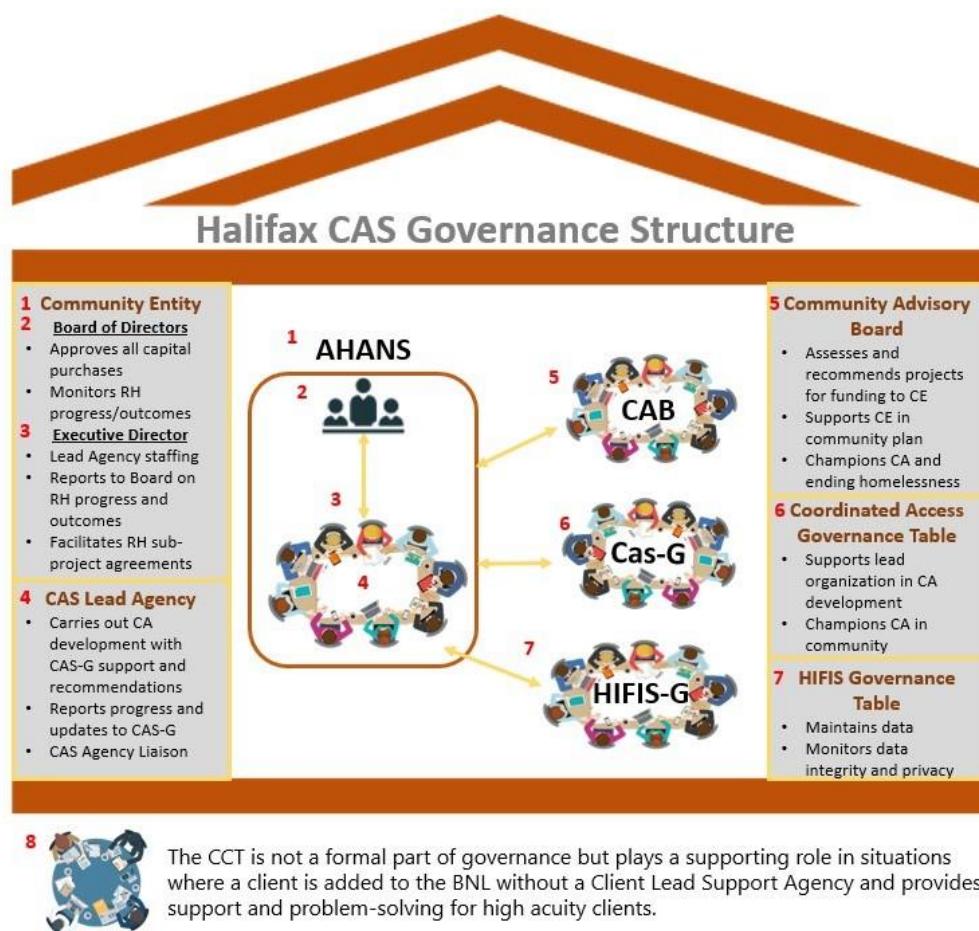
The Halifax Coordinated Access System is guided by the following principles:

- **Prioritization of the Most Vulnerable.** Resources are directed to individuals, families and couples who are the most vulnerable and in need of assistance.
- **Low-barrier and Easily Accessible.** Eligibility and enrollment obstacles have been minimized to ensure that all individuals receive support, housing, or other resources.
- **No Screening out.** Individuals or families are never turned away due to lack of income, lack of employment, disability status, domestic violence status, criminal records, or substance use unless the project's primary funder requires the exclusion.
- **Housing First.** Halifax CAS is built upon the core principles of *Housing First*.
- **Person-Centered.** Every person experiencing homelessness participates in their own housing plan and is offered assistance and treated with dignity. Participants are made aware of their options and offered choice whenever possible. Everyone, with the appropriate level of support, has the ability to resolve their own homelessness and successfully maintain their own housing.
- **Standardized Access and Assessment.** Individuals and families can easily access CAS. The system is known to the community, easy to navigate and accessible to all.
- **Local Focus.** Local data and research inform and directs decisions regarding housing intervention strategies, resource allocation and CAS investments.
- **Resolving homelessness with Urgency.** Moving beyond "managing" homelessness requires urgency across the sector.
- **Inclusivity and Equity.** Halifax CAS is committed to Racialized Equality, Reconciliation, and the inclusion of Person's with Lived Experience (PWLE).

Governance

Successful implementation of CA requires a straightforward governance structure that outlines the leadership, planning, implementation, and ongoing management of the system. It can be complex to develop governance within CA because in doing so, there must be agreement amongst a diverse range of service providers and stakeholders who each have their own missions, mandates, and traditional ways of doing things.

There are a variety of bodies and groups that play a role in CA in the HRM. Together they ensure that the system functions in a way that serves the best interests of clients who are experiencing homelessness. The Community Entity (CE) is responsible for the implementation of the Community Plan and receives support from the Community Advisory Board in the form of insight, feedback, guidance, and recommendations regarding the distribution of Reaching Home funding. The CE, as an agency, also has a Board to which they are responsible and to which all progress towards Reaching Home outcomes must be reported. The CAS Governance Table (CAS-G) collaborates with the Coordinated Access Lead Agency, the HIFIS Governance Table (HIFIS-G) and the HIFIS Lead to develop policies and procedures related to the overall operation of CAS. Policies and procedures support the planning, implementation and provide strategic direction. Policy is supported by procedures, which outline how things are carried out according to the policy. The Case Conference Table (CCT) supports direct service delivery by being a connection between the system and its hardest to serve clients.



Community Entity

The Community Entity (CE) is an organization that enters into a funding agreement with Employment and Social Development Canada on behalf of the community. The CE brings together community stakeholders to form a Community Advisory Board (CAB) and works with the CAB to develop a community plan.

The CE is responsible for the implementation and execution of the community plan. They solicit and approve projects and monitor all agreements with third-party service providers. They are responsible to report to ESDC on their activities and disbursements and to collect and share data and information, and report on the results of the projects.

In the HRM, the CE is the *Affordable Housing Association of Nova Scotia* (AHANS). AHANS is also accountable to its Board to report all progress towards Reaching Home outcomes and the Board has full decision-making power over capital purchases.

Community Advisory Board

The Community Advisory Board (CAB) is a group composed of community stakeholders, individuals from the private and voluntary sectors, and officials from all levels of government (municipal, provincial, and federal). The CAB plays a key role in fostering collaboration, coordinating community efforts, and integrating local homelessness solutions and strategies with those of the province. The CABs primary purpose is to provide insight, feedback, guidance, and recommendations to the CE regarding the distribution of Reaching Home funding for relevant sub-projects.

The CAB is bound by their Terms of Reference.

Coordinated Access Governance Table (CAS-G)

The CAS Governance Table (CAS-G) advises the Community Entity (CE) on planning, implementation, and ongoing monitoring of CA. This body also advises the CE about Coordinated Access policies and procedures.

CAS-G is comprised of staff from a variety of service providers in the homelessness serving sector and staff from the Province of NS.

The CAS-G is bound by their Terms of Reference.

HIFIS Governance Table (HIFIS-G)

The HIFIS Governance Table (HIFIS-G) oversees the decisions related to implementing and maintaining the data collected in HIFIS. This involves creating a Terms of Reference, developing policies and protocols, and addressing data-related issues (legal, privacy, integrity of data collection).

The HIFIS-G is bound by their Terms of Reference.

Coordinated Access Lead Agency

The CAS Lead Agency supports the governance process by carrying out a variety of duties that meet the administrative needs of the system.

In the HRM, the CAS Lead Agency is *AHANS*.

AHANS employs a Director of CAS and a CA/BNL Coordinator. Both roles are responsible for overall coordination of the system, while the CA/BNL Coordinator serves as a staff contact for agency questions.

HIFIS Lead Agency

The HIFIS Lead Agency supports the set-up, implementation, and ongoing maintenance of HIFIS for all agencies participating in CA. The HIFIS Lead develops HIFIS communications strategies, privacy framework, policies and procedures, and trains staff across the system to use the database. They are responsible for ongoing maintenance of data.

As CAS Lead Agency, AHANS provides the staffing for this role.

Data and community coordination

Homeless Individuals and Families Information System (HIFIS)

The system used to store and manage data about the individuals and families experiencing homelessness in the HRM is the Homeless Individuals and Families Information System (HIFIS). HIFIS is web-based and allows service providers from across the HRM to maintain real-time data – meaning that the data is actual at the time of viewing. Information is kept live, up-to-date, and consistent in HIFIS. The HIFIS Lead maintains the system and is available to all agencies for troubleshooting and assistance.

“Data quality” refers to the reliability and validity of data collected. With good data quality, the CAS can more accurately “tell the story” of those experiencing homelessness in Halifax. The quality of data is determined by assessing three characteristics - timeliness, completeness, and accuracy.

Case Conferencing Table (CCT)

The Case Conferencing Table is made up of frontline staff and/or managers of CAS members and takes a team approach to co-ordination and care of clients. Members of the CCT work together to ensure that higher acuity or vulnerable individuals and families on the BNL have access to resources to support them in securing and maintaining housing.

The CCT is not a governance body but plays a supporting role in the system in situations where a client is added to the BNL without a Client Lead Support Agency and provides support and problem-solving for high acuity clients.

Governance Policies

Policy #G001 Community Advisory Board (CAB)

Date: November 2021

Reaching Home requires that all Designated Communities have a Community Advisory Board (CAB). The role of the CAB shall be to provide insight, feedback, guidance, and recommendations to the CE regarding investment in **activities** and **capital** that will achieve or advance the outcomes in the Community Plan.

Procedure:

The CAB is bound by the CAB Terms of Reference.

Policy #G002 Coordinated Access Governance Table (CAS-G)

Date: November 2021

There shall be a CAS Governance Table (CAS-G) comprised of staff from service providers and provincial government agencies. CAS-G shall support the planning, implementation, and ongoing monitoring of CA in support of the CAS Lead Agency.

This body advises regarding policies and procedures directly related to CA. Representative agencies of the CAB and CAS-G shall not be the same.

Procedure:

The CAS Governance Table (CAS-G) shall support AHANS (the CAS Lead Agency) to develop policies and procedures related to the overall operation of CAS and provide ongoing monitoring and support of the CAS process.

The CAS-G is bound by the CAS-G Terms of Reference.

Policy #G003 HIFIS Governance Table (HIFIS-G)

Date: November 2021

There shall be a HIFIS Governance Table (HIFIS-G). HIFIS-G shall oversee decisions related to implementing and maintaining the data collected in HIFIS. This involves creating a Terms of Reference, developing policies and protocols, and addressing data-related issues (legal, privacy, integrity of data collection).

This body advises regarding policies and procedures directly related to HIFIS.

Procedure:

The HIFIS Governance Table (HIFIS-G) shall support AHANS (the CAS Lead Agency) to develop policies and procedures related to the overall operation of HIFIS and provide ongoing monitoring and support for the integrity and protection of data collected in the CAS process.

The HIFIS-G is bound by the HIFIS-G Terms of Reference.

Policy #G004 Community Data Sharing Agreement

Date: November 2021

There shall be a Community Data Sharing Agreement (CDSA) which will be coordinated by the Community Entity and signed by all service providers participating in Coordinated Access in the HRM.

Reaching Home Funded organizations cannot receive Reaching Home funding without a signed CDSA in place.

Procedure:

AHANS shall carry out annual audits of service provider information to ensure that every service organization participating within CAS have a signed Community Data Sharing Agreement.

Policy #G005 BNL Data Management (HIFIS)

Date: November 2021

There shall be one system that houses and manages the BNL. In the HRM, the system used to manage BNL information and data about the individuals and families experiencing homelessness in the region shall be the Homeless Individuals and Families Information System (HIFIS).

Information shall be kept up-to-date and consistent in HIFIS and all agency staff will enter data into the system no later than one (1) business day after obtaining the information from a client or according to the standards of their agency – whichever is less.

Procedure:

Staff shall document all contact they have with clients and update any relevant BNL and client information in HIFIS accordingly. This must be completed no later than one (1) business day after client contact or according to the standards of their agency – whichever is less.

Policy #G006 Data Maintenance (HIFIS)

Date: November 2021

The CE shall designate a HIFIS Lead to maintain the data system and be available to all agencies for troubleshooting and tech assistance. All agency enquiries shall receive a response from the HIFIS Lead or IT consultant within one business day.

Procedure:

Should a staff member require tech support with a HIFIS related issue, they should contact the HIFIS Lead. If the assistance is required after hours, an email detailing the problem or concern and what steps were taken to remediate the issue before contacting the HIFIS Lead should be sent. Staff can expect to receive tech support within one (1) business day.

Policy #G007 HIFIS Lead

Date: November 2021

The CE shall designate a HIFIS Lead that will oversee the set-up, implementation, and ongoing maintenance of HIFIS for all agencies participating in CA. HIFIS shall also have a governance table and it shall be the responsibility of the CE to set that up and coordinate its operation.

The HIFIS Lead shall be responsible for all HIFIS communications strategies, privacy framework, policies, and procedures and ongoing maintenance of data.

Procedure:

AHANS will work within their organization and liaise with all organizations to ensure there is access to HIFIS across the Halifax CAS.

Upon hire, the AHANS HIFIS Lead provides HIFIS support and training to new agency staff to use HIFIS. Training shall be held monthly or on an ad hoc basis as required.

HIFIS Lead contact information: kathleen@ahans.ca, 782-414-1478

Policy #G008 Designated HIFIS Staff in each Agency

Date: November 2021

Each organization shall have a designated HIFIS staff member responsible to coordinate their services and operations with the AHANS HIFIS Lead and connect monthly or as needed to ensure the optimal operation of HIFIS within their agency.

Procedure:

AHANS will work within their organization and liaise with all designated HIFIS staff members to ensure there is access to HIFIS across the Halifax CAS. Any changes to the designated HIFIS staff member must be communicated to AHANS HIFIS Lead within one (1) business day of that change.

Upon hire, the AHANS HIFIS Lead provides HIFIS support and training to new agency staff to use HIFIS. Training shall be held monthly or on an ad hoc basis as required. It is the designated HIFIS staff that are responsible for informing AHANS of staff requiring training.

Policy #G009 BNL Access and Updates

Date: November 2021

There shall be a single BNL located on HIFIS that is managed by the Coordinated Access Lead Agency. There shall be no other version of the BNL kept anywhere else in the system or on any other program.

The BNL database shall be updated by all partners who have contact with clients according to their agreements. All partners working within the CA systems shall have access to the BNL in real time so that they can update information and track client progress.

As a requirement of participating in CAS, all CAS partners shall commit to keeping information as current as possible.

Procedure:

Any time staff meet with a client, they will provide an update in HIFIS. Any changes to client information must be inputted by staff within one (1) business day.

Policy #G010 Staff Oath of Confidentiality and HIFIS User Agreement

Date: November 2021

All staff participating in CAS and accessing HIFIS are required to sign an Oath of Confidentiality and User Agreement before they are provided with system credentials. Organizations shall maintain these records for all staff and provide them to the HIFIS Lead upon request.

Procedure:

At onboarding, all staff whose role will require them to participate in CAS will sign the Oath of Confidentiality and User Agreement with their organization.

This form will be kept in the staff member's HR file and can be made available to the HIFIS Lead if requested.

The format and wording of this form may change periodically to ensure consistency with best practice across the sector. If this were to happen, AHANS would ensure all agencies are provided with the new form and all copies of the old form would be destroyed by each participating agency.

Policy #G011 Privacy and Protection of Information / Client Consent

Date: November 2021

Collection of all client information is subject to Nova Scotia's [Freedom of Information and Protection of Privacy Act](#) (FOIPOP) and shall be kept fully confidential. Forms may change from time to time to ensure the most current legislation is being observed.

Procedure:

Whenever staff engage clients regarding their personal information, clients must be made aware of the ways their information will be shared and used. This applies to during the intake process and at all other times.

Clients must grant written permission for their information to be collected by asking the client to fill out and sign the [Client Consent Form](#) and the [HIFIS Consent Form](#).

Policy #G012 Data Breaches

Date: November 2021

Data breaches are defined as unauthorized access to or collection, use, disclosure, or disposal of personal information. Data breaches shall be immediately reported to the Coordinated Access Privacy Officer (the HIFIS Lead) as well as the Privacy Officer for the organization in which the breach occurred.

Procedure:

The CAS Privacy Officer must immediately follow the [Breach Management Protocol](#) established by [Office of the Information and Privacy Commissioner for Nova Scotia](#).

Access Points

To ensure that each person or family experiencing homelessness in the HRM can easily get services, there is a consistent process and structure for intake. Access points are available across the city where clients can come to discuss their situation and seek help. If an individual or family has been experiencing homelessness, access points will work with the individual or family to complete an intake and assessment.

There are access points located across the HRM. Access point are homelessness serving agencies such as shelters that are open 24/7 and are available to people in person or over the phone. Housing Focused Outreach also provide access to individuals and families who are sleeping rough, camping, or living in spaces which are not intended for human habitation.

Please refer to [Appendix B](#) for the current list of access points and agencies able to do intakes in the field.

Access Policies

Policy #A001 Determination of Homelessness in the HRM

Date: November 2021

Homelessness is the situation of an individual or family who does not have a permanent address or residence; the living situation of an individual or family who does not have stable, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it.

Individuals and families must be homeless under this definition to complete a Coordinated Access Intake and be added to the BNL.

Procedure:

When an individual or family presents as homeless at an Access Point and would like to do an intake, the agency should check to see:

1. Is the individual or family eligible for the BNL?
2. Is the individual or family already on the BNL?
 - Do a search on HIFIS before starting an intake.

If they are eligible and have not completed a Coordinated Access Intake already, an intake can be completed. (see [Policy #A004 Coordinated Access Intake process](#))

If they are eligible, and are already on the BNL, staff will work with the client to ensure that their information is up to date and complete. If their file has been made inactive, it will be reactivated as appropriate. If a client has previously revoked consent, all consent forms shall be completed again.

Policy #A002 Coordinated Access Intake training for Staff

Date: November 2021

CAS/BNL orientation and intake/assessment training shall be offered to all participating partners to ensure the community of service providers are knowledgeable about CAS participation and performance expectations and are following guidelines and procedures for CAS/BNL operations.

All agencies that participate in CAS shall require front-line staff to be trained to conduct Coordinated Access intake and assessment as part of their onboarding process.

Procedure:

Upon hire, the onboarding to any CAS agency that does intake will be responsible to ensure the CA/BNL Coordinator is advised of the new hire and training is set up as soon as possible.

CAS/BNL training includes information about the following:

- CAS access points and access procedure
- VI-SPDAT and the processes and uses of assessment information to coordinate client care
- General eligibility requirements for CAS and CCT
- General information about CAS participating programs
- Prioritization
- Referral procedures
- Data collection, data management, data sharing and reporting requirements and responsibilities

Staff can receive training by attending a CAS/BNL Orientation Session provided by AHANS. Please contact AHANS directly for information.

Policy #A003 Conducting a Coordinated Access Intake - no trained staff available

Date: November 2021

All access points are responsible to have staff on shift that have received the CAS/Coordinated Access Intake training to complete intake or review intake prior to submission.

It shall be the responsibility of agency management to ensure the intake is adequately reviewed before being submitted.

Clients shall not be penalized or limited access to CAS and the BNL because of staffing issues.

Procedure:

Should an intake need to be made and a trained staff member is not on site and/or available to complete the intake, the intake will be carried out by untrained staff. The intake must, subsequently, be reviewed by a trained staff member before being forwarded to AHANS. This review must take place no later than one (1) business day after the intake.

Policy #A004 Coordinated Access Intake Process

Date: November 2021

All agencies participating in CA shall complete intakes in the same manner.

Agencies shall not develop agency specific processes for Coordinated Access Intake and must maintain consistency with CAS processes.

Any variations to process must be initiated by the CAS/BNL Coordinator, must be system-wide and must be approved by the CAS Lead Agency prior to implementation.

Procedure:

If staff confirm that the client has been experiencing homelessness, the Access Point staff will work with the client to complete the following forms:

- Coordinated Access Intake form
- the Housing Preference form
- the BNL Consent Form
- HIFIS Consent form
- the VI-SPDAT Assessment

The intake and assessment process will take between 30 to 60 minutes and clients need to be told this before they begin. They may decide to complete the Coordinated Access Intake Form and Consent and then schedule another time to complete the VI-SPDAT (and CCT consent). At the beginning of the intake process, staff should also advise clients that CAS is not a guarantee of housing that that they should also continue to try and find resolutions to their own homelessness.

Once the Coordinated Access Intake has been completed, staff should ask clients to continue to maintain monthly contact so they can be easily reached if an offer of placement becomes available or to update their situation or contact information if anything changes.

If the client presents with a VI-SPDAT score of 8 or higher, they should be offered the opportunity to complete a Case Conferencing Table (CCT) Consent Form to engage in case conferencing. *If they refuse during intake, they can be told that this can be completed at any time if they choose.*

Once filled out, all forms and documents for the BNL and/or CCT must be emailed to the CAS/BNL Coordinator at AHANS within one (1) business day of completion. If the intake package is incomplete, the CAS/BNL Coordinator will communicate with the Lead Support Agency to seek a resolution. The CAS/BNL Coordinator will confirm that they have received a complete package by sending the Lead Support Agency the individual or family's unique identifier. (see [**Policy #A006 Unique Identifier**](#))

Any variation to the outlined process must be initiated and approved by the CE at the recommendation of CAS-G and implemented by the CAS/BNL Coordinator, must be system wide and must maintain consistency with CAS process.

Policy #A005 Intake documents

Date: November 2021

The intake shall consist of completion of the following documents:

- HIFIS Consent form
- Coordinated Access Intake form
- BNL consent form
- Assessment tool
- Housing preference form
- CCT consent form

All current forms are in the appendix of this manual and shall not be adapted for any reason. Any updates to the forms will be initiated and implemented by the Lead Agency only.

Procedure:

See the procedure for [**Policy #A004 Coordinated Access Intake Process**](#).

Policy #A006 Unique Identifier

Date: November 2021

A unique identifier code shall be assigned to the person's file to ensure client privacy. It shall be used when communicating about an individual or family amongst service providers during case conferencing and problem-solving.

To avoid duplicate files, staff shall refrain from creating a new record until first verifying if a previous record exists.

Procedure:

A unique identifier is provided for everyone on the BNL and is created when a person is entered into HIFIS for the first time.

Policy #A007 Client refusal to be added to the BNL

Date: November 2021

A client must choose and consent to being placed on the BNL. If the individual or family does not consent to being added to the BNL, they are not required to be added. Clients shall not be penalized in any way for this decision.

Procedure:

If the client declines the offer of an intake, agency services are provided without penalty, but they cannot be offered an intake into CAS and the BNL. Clients should be advised that if they change their mind and still meet all criteria, an intake can be completed later.

If the client declines due to safety and privacy concerns, see [**Policy # A010 Anonymous \(Non-Identifying Coordinated Access Intakes and Tracking\)**](#). The client may be entered into the system without identifying information. See this policy for more information.

Policy #A008 Client Lead Support Agency

Date: November 2021

When an individual or family is added to the BNL, the intaking agency will become their Lead Agency. The client's Lead Support Agency will be their primary contact until the client is matched to a client supporting agency (caseload vacancy) and/or a housing opportunity with an agency participating in coordinated access.

Clients who do not have a Lead Support Agency shall be added to the "Not Connected" List by the CAS/BNL Coordinator.

Procedure:

Once client is added to the BNL, the Lead Support Agency will continue to support them until they are matched with the appropriate supports and services. When caseload vacancy and/or housing becomes available, the Lead Support Agency will attempt to contact the individual or family within one (1) business day to connect them to the opportunity.

While "waiting" for a housing resource or caseload vacancy, the Lead Support Agency will:

- Continue to encourage the client to try and find resolutions to their own homelessness.
- Ensure the client is Document Ready.
- Provide updates to the CAS/BNL Coordinator on their status.
 - If the offer is accepted (or not) by the client, the Lead Support Agency will inform the CAS/BNL Coordinator of the client's decision.
- Advocate for the client at the CCT if appropriate based on CAS Policy and client consent.

When a caseload vacancy and/or a housing opportunity becomes available, the Lead Support Agency will be instructed by the CAS/BNL Coordinator to contact the client to connect them to the opportunity that is being offered. The Lead Support Agency will liaise on behalf of the client with the CAS/BNL Coordinator.

Policy #A009 Client Transfers between Lead Agencies

Date: November 2021

Client Initiation of transfer: A client may, at any time, either in written or verbal form, request a transfer from their Lead Support Agency to another Lead Support Agency. They are not required to provide a reason for this request.

Service Provider initiation of transfer: Client support and housing programs may initiate transfers between agencies should extenuating circumstances such as a change in program capacity or other program changes create a need for the transfer.

In all cases, when a client's Lead Support Agency changes, the CAS/BNL Coordinator shall be informed and the BNL shall be updated with one (1) business day.

No transfer between client support and housing programs shall occur without CAS Lead Agency being informed.

Procedure:

Upon receipt of a client request, the Lead Support Agency will work with the client to identify a new Lead Support Agency and will inform the CAS/BNL Coordinator of the change by email. The CCT may be asked to identify an appropriate new Lead Support Agency for high acuity clients that are involved with CCT.

The existing Lead Support Agency must continue to support the client until a new Lead can be assigned and they are informed by the CAS/BNL Coordinator of the transfer.

If a transfer takes place, the client's support and housing program shall notify AHANS, providing all appropriate information and documented reasons for the transfer. Per policy, *AHANS must be informed of any client transfer.*

Policy #A010 Anonymous (Non-Identifying) Coordinated Access Intakes and Tracking

Date: November 2021

If a client wishes to be tracked in the BNL anonymously, they have that right.

Non-Identifying client information or aliases are allowable for the BNL:

- When the individual or family prefers to use an alias or be anonymous.
- If the individual or family has concerns for their safety.
- If staff has concerns for the individual's imminent safety or well-being.

Procedure:

If a client normally uses an alias, does not wish to provide their name or they or the staff member is concerned for their safety, their data can be entered into BNL as **Anonymous (Non-Identifying)**.

Please ensure that the entry *does not* contain any identifiable information including:

- DOB
- SIN #
- MSI #

Outreach or agency staff shall track the **Anonymous (Non-Identifying)** client and alias information given to them. When submitting an intake to the BNL, the staff submitting the form will create a non-identifying "name" for the client. The following "**Naming Convention**" will be used:

- First Name: Date of Intake (Written Out with no space)
- Last Name: Distinguishing Characteristic (No space)

Example: *MaySixth RedHat*

Once the intake data is submitted to the BNL, the CAS/BNL Coordinator will provide the Lead Support Agency with the BNL Unique Identifier (see Policy #A006 Unique Identifier), which can be added to the referring programs' file/case notes.

Should the individual provide consent to have their real name used on the BNL in the future, the non-identifiable client data will be updated/amended to reflect the person's first and last name.

Policy #A011 Intakes for Women Fleeing Violence

Date: November 2021

All women fleeing violence shall be tracked anonymously and an anonymous, non-identifying intake process shall be used to enhance their safety and confidentiality.

Procedure:

The data of women fleeing violence should be entered onto the BNL as **Anonymous (Non-Identifying)**. Please ensure that the entry *does not* contain any identifiable information including:

- DOB
- SIN #
- MSI #

The naming convention for the anonymous entries of women fleeing violence will be the same convention used in Policy #A010 **Anonymous (Non-Identifying) Coordinated Access Intakes and Tracking**.

- First Name: Date of Intake (Written Out with no space)
- Last Name: Distinguishing Characteristic (No space)

Example: *MaySixth RedHat*

Policy #A012 Inactive Policy

Date: November 2021

Individuals and families that have not had contact with their Lead Support Agency, their client support agency, a transaction with a participating coordinated access agency or a shelter for ninety (90) days, who have moved out of the HRM, who have been incarcerated or institutionalized for more than ninety (90) days, or who have died shall be considered **In-Active**.

Procedure:

If there is concern that a client has not been in contact for ninety (90) days, every effort must be made to make contact. Efforts to directly connect with the client shall include but are not limited to:

- Sending email
- Calling the last known telephone number
- Leaving messages with other individuals (family or friends) or others that have been identified by the client on the Coordinated Access Intake as permissible contacts
- Asking Street Outreach to connect with them if applicable

If none of the above efforts result in contacting the client, the client's status on the BNL is changed to **In-Active**.

Other specific categories within the **In-Active** status on the BNL are also tracked and updated as follows:

- **In-Active - No Contact** - after ninety (90) days of no contact
 - (Status changed after three (3) contact attempts)
- **In-Active – Client Request** when a client has requested that their data no longer be collected and they be removed from the active BNL

The following situations must be first verified and then changed with backing documentation placed in HIFIS:

- **In-Active – Moved** to another community outside the HRM
- **In-Active – Incarcerated**
 - status changed after ninety (90) days of incarceration
- **In-Active – Institutional Systems**
 - status changed after ninety (90) days due to hospitalization, institutionalization, etc
- **In-Active – Deceased**

Policy #A013 Client Removal from the BNL

Date: November 2021

A client can withdraw consent or request to have their name removed from the BNL at any time.

Procedure:

The client can make this request verbally or in writing to any of the following:

- Any of the CAS participating service providers agencies
- Their Lead Support Agency
- Directly to the CAS/BNL Coordinator at AHANS

When the client withdraws consent or makes a request to have all their information removed from the BNL, the housing support worker/intensive case manager should immediately notify CAS/BNL Coordinator at AHANS who will immediately cease collecting and updating information about that client and move the individual to **In-Active – Client Request** with consent withdrawal noted.

This does not mean that their file will be removed from HIFIS, but simply that their name is no longer on the BNL.

Policy #A014 Client Reinstatement to the BNL

Date: November 2021

When an individual or family that has been previously removed from the BNL requests to re-engage with CAS, a new Coordinated Access Intake and consent form shall be completed.

If their consent on file is no longer in force, the client shall be required to sign new consent forms.

Procedure:

The process to reinstate a client to the BNL is the same as it would be to add them to the BNL. They will be required to complete and sign all forms again. Their status would then be reactivated.

When a client is changed from **In-Active** to **Active** their status will be updated to **Active – RfIA**.

Policy #A015 Death of a client on the BNL

Date: November 2021

When staff become aware of the death of a client that is on the BNL, they must undertake to confirm the death. If it can be confirmed, they shall immediately change the client's status to **Inactive - Deceased** in addition to any organizational procedures that would take place following the death of a client.

Procedure:

Staff must confirm that the information is accurate. If the person can be confirmed to be deceased, they will enter this into HIFIS immediately. Staff will then change the client's status to **Inactive -Deceased**.

Policy #A016 Client Inquiries Regarding BNL Status and Process

Date: November 2021

Individuals, and families have the right to inquire at any time as to their BNL status by connecting with their Lead Support Agency or inquiring directly to the CAS/BNL Coordinator.

Procedure:

"Status" means telling a client if they are "active or inactive." Staff with access to the BNL are not required to request permission to reveal this information to a client and may do so upon request.

Because the BNL is a dynamic list which is prioritized and service agency placements are matched according to unique eligibility criteria, clients should be advised that it is not possible to identify where they are on the BNL and how long it will take for them to be housed and/or taken onto a caseload.

Triage and Assessment

Once a client has been identified as eligible for intake to the BNL, staff will work with the client to obtain all the information required by the system for them to be matched with supports and resources that meet their unique needs. The Coordinated Access assessment process is consistent across all agencies and locations. This is critical.

Common Assessment

Common assessment tools are used to gather information from people and make an evaluation in a consistent and transparent way. Through a series of questions, conversations and/or observations, each person's experience, situation, or understanding is measured, categorized and/or scored. Common assessment tools are critical to CA. They ensure communities are asking the right questions to understand people's strengths, vulnerabilities, and risks. Common Assessment tools assist staff to identify housing services tailored to individual need; prioritize and focus resources effectively, efficiently, and transparently; and measure change and progress.

There will be cases where clients refuse to complete the assessment. It is important to respect a client's right to refuse assessment or other services.

Triage and Assessment Policies

Policy #TA001 Common Assessment Tool

Date: November 2021

There shall be a common assessment tool that all access points use with clients. Upon hire, all agencies shall provide training for staff to carry out the assessment so that it is being completed the same way regardless of location or staff member.

Procedure:

The Common Assessment for the Halifax CAS system is the Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT).

The CAS Lead will record the VI-SPDAT score from the intake forms into HIFIS.

Policy #TA002 Refusal to Complete Common Assessment

Date: November 2021

Individuals have the right to refuse to complete a Common Assessment.

Procedure:

It is important to respect an individual's or family's right to refuse service and/or support. Another worker with whom the individual experiencing homelessness is more comfortable may be the best person to complete this step – it is ok to ask them if they prefer that.

If the client completely refuses to complete the common assessment, their refusal should be noted in HIFIS. The client will still be eligible for intake to the BNL if they are determined to be homeless.

Policy #TA003 Clients Not Currently Homeless Added to the BNL

Date: November 2021

There shall be extenuating circumstances where clients who are not currently homeless may be added to the BNL.

Procedure:

Clients that are not currently homeless may be added to the BNL if **all** the following criteria are met:

- The person becoming homeless will impact the health and safety of others in the community.
- The person becoming homeless will create undo strain on affiliated community organizations.
- The person will become homeless within the next sixty (60) days.

In addition, clients that are not currently homeless may be added to the BNL if any of the following criteria are met:

- A client has not been added to the BNL but is facing eviction or housing termination and there are outstanding factors which the CCT determines warrant prioritization.
- A client who had previously been prioritized and housed from the BNL but is facing housing unit termination, transfer, or an instance where an individual may benefit from transferring to another service provider.

If the above conditions and/or criteria apply, their case will be forwarded to the CCT for their decision. CCT will review the case and decide whether an exceptional referral to the BNL can be made. No referral shall be made without an affirmative decision from the CCT.

Prioritization

Prioritization makes it clear who should be offered a spot when a vacancy becomes available. The prioritization criteria that a community chooses determines order on the priority list based on information from the assessment and ensures consistency of placement across the system.

According to Reaching Home, “*Clients that meet more of the prioritization criteria are sorted closer to the top of the Priority List and clients that meet fewer criteria are sorted closer to the bottom. When implemented successfully, communities will be able to explain how clients are prioritized for limited resources based on the outcomes they want to see over time.*”

Prioritization criteria in the HRM include chronicity, vulnerability, indigeneity, ethnicity, and acuity and are based on the Community Plan’s mandated outcomes which are stated in the Community Plan as follows:

- ✓ 50% reduction in chronic homelessness
- ✓ Reduction in Indigenous homelessness
- ✓ Functional Zero for Persons of African Descent
- ✓ 100% reduction in return to homelessness from housing
- ✓ Reduction in new inflows into homelessness

Prioritization policies

Policy #P001 Agency Eligibility Requirements

Each housing and/or support resource shall have an established set of eligibility criteria. These eligibility criteria are used in the matching process to ensure only those individuals and families who are eligible are matched to that resource. For this reason, all participating agencies shall provide the CE with all the eligibility and exclusionary criteria used by their program annually.

Procedure:

Eligibility criteria such as age restrictions, health conditions, geographic location, etc. shall be provided to AHANS in writing by each housing and /or support resource on an annual basis. If secondary information or assessment is required (e.g., VI-SPDAT), this shall also be identified. Any changes to these criteria shall be submitted to AHANS in writing within seven (7) days of the change.

Policy #P002 Prioritization Procedure Matching

Date: November 2021

The **Community Matrix** used to match with clients with resources provided by the CAS shall be developed and reviewed, bi-annually, by the Community Entity with advice from what advisory bodies are appropriate at the time.

Procedure:

On a bi-annual basis, the CE will convene a process to review and update the Community Matrix. When the review is complete, the updated Matrix will be presented to the CAS-G and the participating agencies as an update.

Policy #P003 Service Provider Eligibility Requirements

Date: November 2021

All participating agencies shall provide the CE with eligibility and exclusionary criteria used by their program(s). If secondary information or assessment is required (e.g., VI-SPDAT), this must also be identified.

This information shall be updated annually and any interim changes to these criteria must be submitted to the CE in writing within seven (7) days of the change. For RH funded programs, this shall be a requirement of ongoing funding.

Procedure:

Each housing and/or support resource has an established set of eligibility criteria, these eligibility criteria are used in the matching process to ensure only those individuals and families who are eligible are matched to that resource. For this reason, all participating agencies shall provide the CE with all the eligibility criteria used by their program annually.

Policy #P004 Other Service Provider Priorities

Date: November 2021

No other priorities, other than the ones listed in the Community Matrix, shall be applied to the prioritization process.

Service providers shall not screen a client once matched to a resource or housing placement.

Procedure:

If a service provider wishes to adjust their eligibility criteria, this must be done by submitting new program eligibility criteria to the CE per [Policy #P003 Service Provider Eligibility Requirements](#).

This restriction extends to and is inclusive of screening for “client mix.”

Vacancy Matching and Referral

Vacancy matching and referral are the final steps in the CA process. Clients on the By-Name List are matched according to priority and subsequently offered vacancies that become available. An effective matching and referral process ensures that all “side doors” to vacancies are closed, guarantees transparency and consistency, reinforces client choice, and supports effective inter-agency collaboration.

In alignment with best practices across the sector, agencies must clearly define the eligibility and exclusionary criteria used by their program and provide it to the CE in writing. This includes acuity, demographics, support requirements as well the acceptable time frames for reviewing and communicating matching decisions. The CE will maintain this information and request updates on an annual basis or as needed.

Matching should always be carried out to ensure that, whenever possible, clients are matched to housing or client support programs that best meet their needs and preferences.

Vacancy Matching and Referral policies

Policy #V001 Notification of Vacancies

Date: November 2021

Support and housing providers shall notify CAS/BNL Coordinator when vacancies on support caseloads or in housing units occur or are expected to occur. No vacancy shall be filled outside of the CAS process.

Procedure:

It is important that notifications are provided to CAS Lead Agency (AHANS) as soon as possible to ensure vacancy times are as short as possible. Participating agencies must notify the CAS/BNL Coordinator when new resources become available or new programs are developed and come online.

When providing notification, it is important to identify specific program so that the CAS/BNL Coordinator can properly match and filter clients according to eligibility criteria that has been provided to the CAS Lead Agency (AHANS).

Policy #V002 Vacancy Filtering

Date: November 2021

All vacancy matching shall be filtered according to provider eligibility and client choice before providing a match to an agency. Agencies will not receive names before this is complete.

Procedure:

Upon receiving a request for vacancy matching, the CAS/BNL Coordinator will filter the list of names provided to an agency as follows:

- 1) Prioritization filters according to Community Plan
- 2) Provider agency eligibility (according to annually submitted eligibility criteria)
 - a) demographics (e.g., age and gender)
 - b) acuity level (high, medium, or low)
 - c) unit requirements (e.g., accessibility)
 - d) others as required
- 3) Client choice. Clients are offered client support or housing resources based on choice and are offered the least restrictive or most abundant resource for which they are eligible.

Policy #V003 CAS Matching Process and Timeline

Date: November 2021

When the service provider informs the CAS/BNL Coordinator of a vacancy on a support caseload or in a housing unit, the CAS/BNL Coordinator shall provide the client support or the housing provider with one name, based on the prioritization filters, the program or housing eligibility criteria, and client choice for client support and/or housing for this vacancy. This match will be provided within one (1) business day of the request.

Procedure:

When a vacancy is available, the CAS/BNL Coordinator will provide the service provider with one name from the BNL that matches the criteria of the program for each vacancy no later than one business day of receiving the request.

The CAS/BNL Coordinator will take measures to ensure that no individual or family is included on a list of names provided who the provider has determined is ineligible due to barring.

Policy #V004 Client Notification Process and Time Limits

Date: November 2021

The client's Lead Support Agency shall attempt to connect with the client for five (5) business days before a new name is matched off the list.

Procedure:

When a client is matched to a resource, the Lead Support Agency will make every effort to connect with them and offer the available resource (client support or housing). Efforts to directly connect with the client shall include but are not limited to:

- Sending email
- Calling the last known telephone number
- Leaving messages with other individuals (family or friends) or others that have been identified by the client on the Coordinated Access Intake as permissible contacts
- Asking Street Outreach to connect with them, if applicable

After attempting to contact the client daily for five (5) business days, the provider agency will provide AHANS with a status update indicating that the client has not been reached. If the client cannot be contacted, AHANS, as the Lead CAS Agency, shall update the BNL to reflect that the client was not matched with a resource. The client cannot be penalized for this. The CA/BNL Coordinator will then provide a new match to the resource.

Policy #V005 Client Accepts a CAS Resource

Date: November 2021

Once a client accepts the offer of a CAS resource of client support or housing, the client shall be immediately taken into the program by the service provider.

Procedure:

Once the placement has been accepted, the provider agency will immediately provide the CAS/BNL Coordinator with a status update indicating that the client has accepted the placement.

The CAS/BNL Coordinator will make note in the BNL that the client has been housed and/or placed on a caseload and contact the client's Lead Support Agency to advise of the placement.

The placement agency will work with the client to assist them to sign all appropriate paperwork including any service or tenancy agreement.

Policy #V006 Client Choice and Refusals of Placement

Date: November 2021

All clients have the right to choice. They can refuse a placement at any time without penalty or reprisal. A client who declines client support or a housing placement shall remain on the BNL without penalty and be offered the next opportunity for which they are a match.

The client does not lose priority and reserves the right to refuse as many times as they wish.

Procedure:

If a client refuses an offer of a housing resource or support, the Lead Support Agency will inform the CAS/BNL Coordinator. The refusal of the resource will be recorded, and the client will remain on the BNL to be matched again.

The CAS/BNL Coordinator will document all refusals for CAS resources offered to a client in HIFIS.

Should a significant number of refusals be tracked for the same client, the CAS/BNL Coordinator may refer the client to the CCT. If the client consents to work with the CCT, a case-conferencing process will examine the client's situation to identify options so that a preferred match can be offered. *The client cannot be penalized in any way for refusal to work with CCT.*

Policy #V007 Client Cannot be reached to Offer a CAS Resource

Date: November 2021

A client who cannot be reached to accept or deny client support or a housing benefit shall remain on the BNL without penalty. This shall happen without reprisal.

Procedure:

After attempting to contact the client daily for five (5) business days, the provider agency will provide AHANS with a status update indicating that the client has not been reached. If the client cannot be contacted, AHANS, as the Lead CAS Agency, shall update the BNL to reflect that the client was not matched with a resource. The client will not be penalized for this.

Policy #V008 Provider Agency Refusals of Clients for Resource Vacancies

Date: November 2021

If a service provider denies or refuses a client match in situations wherein the client otherwise according to their entrance criteria would appear to qualify, the provider shall appear before the CAS-G at their next meeting and explain their reasoning using evidence and data. The unit shall not be filled prior to this meeting. The CAS-G shall make a final and binding decision.

Procedure:

The CAS-G will discuss the situation whereby a service provider denies or refuses to accept a client matched to their resource. This will be done at the next meeting of CAS-G or a specially convened meeting of the CAS-G. The CAS-G may, in a majority vote, choose to overturn the provider decision. The decision of the CAS-G is binding.

The CAS/BNL Coordinator at AHANS shall track denials and refusals of CAS/BNL resources to clients and ensure that they are reviewed by the Community Entity. AHANS as the CE shall use this data to identify and respond to gaps in the system and/or participation or accountability concerns. Further, refusal to honour CAS placements will be noted by the CE and may impact future funding decisions.

The maximum number of times an individual can be put forward to a housing or support vacancy for selection is four (4). After being put forward four times, without selection, the individual or family will automatically be offered the next available support caseload vacancy or housing unit that meets their individualized criteria and meets their choice requirements. The service provider, in this case, cannot appeal the placement.

Appendix A: Policy List

[Policy #G001 Community Advisory Board \(CAB\)](#)

[Policy #G002 Coordinated Access Governance Table \(CAS-G\)](#)

[Policy #G003 HIFIS Governance Table \(HIFIS-G\)](#)

[Policy #G004 Community Data Sharing Agreement](#)

[Policy #G005 BNL Data Management \(HIFIS\)](#)

[Policy #G006 Data Maintenance \(HIFIS\)](#)

[Policy #G007 HIFIS Lead](#)

[Policy #G008 Designated HIFIS Staff in each Agency](#)

[Policy #G009 BNL Access and Updates](#)

[Policy #G010 Staff Oath of Confidentiality and HIFIS User Agreement](#)

[Policy #G011 Privacy and Protection of Information / Client Consent](#)

[Policy #G012 Data Breaches](#)

[Policy #A001 Determination of Homelessness in the HRM](#)

[Policy #A002 Coordinated Access Intake training for Staff](#)

[Policy #A003 Conducting a Coordinated Access Intake - no trained staff available](#)

[Policy #A004 Coordinated Access Intake process](#)

[Policy #A005 Intake documents](#)

[Policy #A006 Unique Identifier](#)

[Policy #A007 Client refusal to be added to the BNL](#)

[Policy #A008 Client Lead Support Agency](#)

[Policy #A009 Client Transfers between Lead Agencies](#)

[Policy #A010 Anonymous \(Non-Identifying\) Coordinated Access Intakes and Tracking](#)

[Policy #A011 Intakes for Women Fleeing Violence](#)

[Policy #A012 Inactive Policy](#)

[Policy #A013 Client Removal from the BNL](#)

[Policy #A014 Client Reinstatement to the BNL](#)

[Policy #A015 Death of a client on the BNL](#)

[Policy #A016 Client Inquiries Regarding BNL Status and Process](#)

[Policy #TA001 Common Assessment Tool](#)

[Policy #TA002 Refusal to Complete Common Assessment](#)

[Policy #TA003 Clients Not Currently Homeless Added to the BNL](#)

[Policy #P001 Agency Eligibility Requirements](#)

[Policy #P002 Prioritization Procedure Matching](#)

[Policy #P003 Service Provider Eligibility Requirements](#)

[Policy #P004 Other Service Provider Priorities](#)

[Policy #V001 Notification of Vacancies](#)

[Policy #V002 Vacancy Filtering](#)

[Policy #V003 CAS Matching Process and Timeline](#)

[Policy #V004 Client Notification Process and Time Limits](#)

[Policy #V005 Client Accepts a CAS Resource](#)

[Policy #V006 Client Choice and Refusals of Placement](#)

[Policy #V007 Client Cannot be reached to Offer a CAS Resource](#)

[Policy #V008 Provider Agency Refusals of Clients for Resource Vacancies](#)

Appendix B: Access Points and Outreach

Access Points:

Adsum for Women and Children
2421 Brunswick St, Halifax, NS B3K 2Z4
902-423-5049

Barry House (Shelter NS)
2706 Gottingen St, Halifax, NS B3K 3C7
902-422-8324

Bryony House
3358 Connaught Ave, Halifax, NS B3L 3B5
902-429-9000

Centre of Hope – Salvation Army
2044 Gottingen St, Halifax, NS B3K 3A9
902-422-2363

Metro Turning Point Centre (Shelter NS)
2170 Barrington St, Halifax, NS B3K 2W4
902-420-3282

Out of the Cold Community Association
1221 Barrington Street, Halifax, NS B3J 1Y2
902-830-4821
(**This is a seasonal site)

Housing focused outreach:

Mobile Outreach Street Health (MOSH-HF)
2131 Gottingen St, Halifax, NS B3K 5Z7
902-802-3332

Navigator Street Outreach, Eric Jonsson
902-209-6517

Appendix C: Intake Package

Halifax By-Name List Intake Form

(To be completed by staff and client together)

PERSONAL INFORMATION

First Name	Last Name	Alias	
Date of birth:		Age:	
What is your pronoun? _____			
Do you identify as transgender or non-binary?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you a member of the LGBTQ2 community?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you Indigenous?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you of African Descent?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever been incarcerated?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you applying as:	<input type="checkbox"/> Family	<input type="checkbox"/> Single Adult	<input type="checkbox"/> Youth

CONTACT INFORMATION

Email: _____

Phone: _____

Pay for incoming calls: Yes No Only certain hours: _____

Text only: Yes No

If no other contact method is available, where do you spend most of their time?

Is there someone else we can pass messages through? Yes (if so, who?) No

SITUATIONAL INFORMATION

Current sleeping situation:

Emergency Shelter Outside Couching Other: _____

Are you currently residing in any of the following temporary situations?

Correctional Facility Transitional Housing Program
 Residential Treatment (Addictions) Hospital Acute Care

When is your expected release or graduation date? _____

How long have you been unhoused/homeless *in the past year?* _____ months

How long since you have lived in permanent stable housing? (years and months) _____

Please check all that apply:

- I require an accessible unit.
- I am currently experiencing violence.
- I have pet(s). Which pets?

- I am leaving domestic violence.
- I smoke cigarettes and/or cannabis.
- I have a history of involvement with Child Welfare Services.
- I am in late-stage alcohol use.
- as a youth or a parent
- I am unable to access all shelters. I have been barred or timed out.
- I am a youth transitioning out of Child Welfare.

Is there anything else important that should be considered when matching you to supports and/or housing? If so, indicate below:

INTAKE STAFF INFORMATION:

Staff: _____ Email: _____

Phone: _____

How long have you known the applicant? _____

CLIENT LEAD SUPPORT AGENCY INFORMATION:

Lead Agency: _____

Address: _____

Phone: _____

Halifax By-Name List Consent Form

By signing below, I _____, give permission for my personal information to be included on the Halifax By-Name List.

- ✓ I understand that the following information will be added to the By-Name List:
 - My name, date of birth and all information on the By-Name List Intake Form
 - My current housing situation
 - My contact information
 - My VI-SPDAT assessment
 - Any other relevant information to assist in my housing placement

- ✓ I understand that non-profit housing providers and housing support providers will be forwarded my referral and VI-SPDAT should I be prioritized for a vacancy. This informs their process as they decide who to offer the housing or support opportunity.

- ✓ I understand that I will be contacted by participating agencies to tell me about housing and/or support services when they become available.

- ✓ I understand that the following agencies will have access to my information on the By-Name List for the purpose of adding my name and updating my status:
 - Adsum for Women and Children
 - Salvation Army Centre of Hope
 - Shelter Nova Scotia
 - Out of the Cold Shelter
 - Affordable Housing Association of Nova Scotia (AHANS)
 - Other: (specify) _____

- ✓ I understand that I can request to have my name removed from the By-Name List at any time.

Name (First and Last):	
Signature:	Date:

Support and Housing Preference Form

Please take time to complete the following questions. Your answers will help us to understand your preferences when matching you to potential housing or caseload vacancies. If you do not have a preference when you read a question, please write NP in the space provided.

Housing preferences

1. Which of the following are your preferences for housing?

- Independent apartment? Yes No
- Shared accommodations or rooming house? Yes No
- Supportive housing? Yes No

2. Do you have pets? Yes No If yes, what kind? _____

3. Do you have mobility issues that require an accessible unit? Yes No

4. Can you climb stairs? Yes No

5. What are your preferences for an apartment?

- Size of building? small medium large
- What are your preferred neighbourhood(s)? (Check all that apply)

<input type="checkbox"/> North End Halifax	<input type="checkbox"/> North End Dartmouth
<input type="checkbox"/> South End Halifax	<input type="checkbox"/> Cole Harbour
<input type="checkbox"/> Fairview	<input type="checkbox"/> Other (please specify): _____
<input type="checkbox"/> Clayton Park	
<input type="checkbox"/> Downtown Dartmouth	
- On which floor would you prefer to live? Ground, Basement, Upper
- Do you prefer your own entrance? Yes No
- Do you prefer smoking, or non-smoking?

6. What else is important for you with regards to your housing?

- Close to a grocery store? Yes No
- Close to a pharmacy? Yes No
- On a bus route? Yes No
- Power included? Yes No

- Internet and/or cable included? Yes No

Support preferences

1. Do you want support to find and secure housing? Yes No
2. Do you want ongoing support to maintain housing? Yes No
3. To remain housed, are there things you need support with? Yes No

Tell us more:

4. Do you want the support of a Housing Support Worker (HSW)? Yes No
5. Do you want the support of an Intensive Case Manager (ICM)? Yes No
6. Are there specific support or housing programs you would like to be considered for when a vacancy happens? (Refer to the list of supports and/or housing and list all you would consider).

Tell us more:

7. Is there anything else you would like to share about your housing or support preferences?

Tell us more:

To be answered by Client Lead Support Agency:

An individual or family becomes document ready once they have completed the Support and Housing Preference Form and the Lead Agency has answered the following questions:

1. Is the person eligible for income? Yes No
2. What source(s) of income do they have, or are eligible for?

Please specify:

3. Do they have arrears with MRHA? Yes No
4. Has the participant completed secondary eligibility for preferred support or housing program? (for example, completed a full SPDAT, MRHA Seniors application) Yes No

Date: _____

Staff Name: _____

Agency and Position: _____

Staff Signature: _____

CCT Consent for Release of Information

I, _____, date of birth, _____,

release information to and request information from the following agencies (please check all that apply):

- | | |
|---|--|
| <input type="checkbox"/> Adsum for Women and Children
<input type="checkbox"/> Metro Turning Point
<input type="checkbox"/> Barry House
<input type="checkbox"/> Salvation Army Centre of Hope
<input type="checkbox"/> MOSH
<input type="checkbox"/> Welcome Housing
(Halifax Housing Help, Dartmouth
Housing Help)
<input type="checkbox"/> Navigator Street Outreach | <input type="checkbox"/> Mainline
<input type="checkbox"/> Stepping Stone
<input type="checkbox"/> YWCA
<input type="checkbox"/> Out of the Cold Shelter
<input type="checkbox"/> Mi'kmaw Native Friendship Centre
<input type="checkbox"/> Elizabeth Fry Society Mainland
Nova Scotia
<input type="checkbox"/> Direction 180
<input type="checkbox"/> Bryony House
<input type="checkbox"/> 902 Man Up |
|---|--|

Other agencies (please print):

Only pertinent information that relates directly to my search for housing and barriers that relate to my ability to find and keep housing, including the risk of imminent housing loss will be shared. If I do not wish an agency to participate in this process, I will indicate this by NOT checking the box next to that agency. Only those agencies that I have checked will have access to personal information or participate in discussions about me, or my family, during CCT meetings.

- ✓ I understand that by signing this form, my personal information will be shared with the above agencies to help connect me to housing and supports when available.
- ✓ I understand that the agencies listed above and their staff operate as a team. This team approach allows the agencies and their staff to assist me to find and keep stable, permanent housing.
- ✓ I understand that providing my consent will allow any and all agency staff to speak with each other and to work with the listed community agencies to support me to find and keep permanent housing.
- ✓ I understand that CCT agencies who work with me, or on my behalf, will consult with me and each other about my housing needs. This may include sharing information about my personal, health and legal issues that may impact my housing needs.

- ✓ I understand that CCT agencies will neither request from each other, nor provide to each other, information which is not directly related to assessing or removing barriers to resolving my housing needs.
- ✓ I understand that I can identify any information that I feel is sensitive or could affect my safety and request that this information not be shared with CCT.
- ✓ I may consent to the sharing of personal information on behalf of minor children for whom I have legal guardianship, or for other persons for whom I am a legal representative.
- ✓ I understand that I can refuse to sign this form and if I do not sign, I will not be prevented from accessing services at this agency and any agency listed above.
- ✓ I understand that I have a right to see a current list of agencies involved in the CCT process. I understand that additional agencies may join the CCT at any time, but these agencies will not have access to my information unless I agree to disclose information to them.
- ✓ I understand that my consent is valid for 12 months, or until such time as I withdraw my consent, whether in writing or verbally, or until my file closes. Consent will be renewed annually.
- ✓ I understand that my consent to participate is completely voluntary and that I may withdraw my consent at any time.
- ✓ I understand that if I have questions about this consent form, I can contact:

at _____

I have read or have had this read to me and understand all the parts of this consent form and give consent.

Signature:	Date:
Signature of Witness:	Date:
Witness – Staff Member Name:	Date:

NOTES:

Appendix D: BNL Update Forms

By-Name List Update Form

Client Unique Identifier: _____ Date: _____

Client Lead Agency: _____

Staff submitting this update: _____

Update/Track	Date	Notes
VI-SPDAT completed		
CCT consent signed		
Completed Housing Preference form		
Is Document Ready		
Offered support		
Accepted support		
Offered housing unit		
Accepted housing unit		
Move-in completed		
Moved to Inactive		
Return to active from housing		
Return to active from inactive		
New lead agency chosen		

It is important to ensure the BNL is updated to ensure we are supporting staff to better meet the needs of the people they have agreed to support in finding housing.

Email all updates to cas@ahans.ca

- If you do not have access to make updates directly on the BNL, please submit this form within 48 hours of knowing a change in individual or family status.
- If have access to make updates directly on the BNL, please use this form to ensure status updates on individuals and families are accurate and complete.

Appendix E: HIFIS Consent Form

HIFIS Consent Form

_____ keeps information and statistics about the services that it provides.

_____ will collect and enter your information into a secure database called the Homeless Individuals and Families Information System (HIFIS).

This database belongs to the Government of Canada but is managed locally by the Affordable Housing Association of Nova Scotia (AHANS). AHANS shares community-level, non-identifying data from HIFIS for reports to the wider community including the Province of Nova Scotia and the Government of Canada.

This non-identifying data will not include your name or any information about your personal situation.

A complete list of the types of data that will be shared is available to you.
Data that is collected and shared does not have an end date.

I have read and understand all the parts of the above data collection and sharing processes. I understand information particular to me, including my name and personal circumstances, will not be included. Data that I provide will not impact on the services and supports that I may receive.

Signature:	Date:
Signature of Witness:	Date:
Witness – Staff Member Name:	Date: