



Coordinated Access Policy Manual

A Guidebook for the Coordinated Access System of
Halifax Regional Municipality

September 2025

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Introduction

As a requirement of Reaching Home, the Canadian federal government's homelessness strategy, all Designated Communities are required to have a Coordinated Access system. Halifax Regional Municipality is a Designated Community, funded through Reaching Home. 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 Regional Municipality (HRM) Coordinated Access System (CAS) is designed to organize the community level response to homelessness in HRM.

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:

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 HRM has been homeless and is unable to secure housing, they will be offered a referral into the Coordinated Access system (CAS) and, if they consent, will be added to the By-Name List (BNL). The HRM 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.

All agencies participating in Data Sharing/Coordinated Access System are required to sign an Interagency Data Sharing Agreement with the CE.

Key Concepts, Terminology and Abbreviations

Canadian Definition of Homelessness and Related Terms

The **Canadian Definition of Homelessness**² defines homelessness as “the situation of an individual or family 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 Homelessness – individuals living in public or private spaces without consent or contract including public space such as sidewalks, parks, forests; or in places not intended for permanent human habitation such as cars or other vehicles, garages/attics/closets or buildings not designed for habitation, or makeshift shelters/shacks or tents. NOTE: As of publication date, HRM designated encampment sites do have consent to occupy that space, but this is still considered unsheltered homelessness.

Sheltered Homelessness – emergency spaces such as overnight shelters, temporary winter shelters, as well as shelters for those impacted by family or intimate partner violence. This may also refer to individuals fleeing a natural disaster or destruction of accommodation due to fire, flood, etc.

Provisionally/Transitionally Accommodated – individuals whose accommodation is temporary or lacks security of tenure.

Hidden Homeless – individual or family living temporarily with others but without guarantee of continued residency or immediate prospects for accessing permanent housing (i.e. couch surfing).

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

² <https://www.homelesshub.ca/sites/default/files/COHhomelessdefinition.pdf>

abuse (intimate partner violence, seniors, youth, racism, homophobia, transphobia, and misogyny).

Individuals 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 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](#)
- [Closing the Circle: Discussing Indigenous Homelessness in Canada](#)
- [Endaamnaan: Home for All Nations](#)

Racialized Homelessness

The HRM 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*³, 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

³ <https://colourofpoverty.ca/>

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.⁴ 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*](#)
- [*The Uneven Racialized Impacts of Financialization*](#)

For additional definitions, see **Appendix D: Additional Definitions**

⁴ [cop-coc-fact-sheet-9-racialized-poverty-in-housing-homelessness-2.pdf \(colourofpoverty.ca\)](#)

Guiding Principles of the Halifax Regional Municipality Coordinated Access System

Introduction:

The Halifax Regional Municipality (HRM) Coordinated Access System (CAS) follows four guiding principles in their work.

1. Adherence to the principles of Housing First
2. Equity and inclusivity in our work
3. Inclusion of the first voice perspectives of marginalized demographic groups and supports self-determination for Indigenous and Black voices in our work
4. Work within the tenets of local capacity and scope

Guiding Principle 1:

The Halifax Regional Municipality Coordinated Access System adheres to the principles of Housing First.⁵

Housing First operates on five core principles: immediate access to permanent housing with no preconditions, client choice and self-determination, a harm reduction/trauma informed approach to recovery, individualized and client-driven supports, and social and community integration. These principles guide Housing First programs in providing stable housing and support services to individuals and families experiencing homelessness.

Here's a more detailed breakdown of each principle:

1. Immediate Access to Permanent Housing with No Housing Readiness Requirements:
 - Housing is provided immediately, regardless of whether someone is considered "ready" for housing.
 - This means individuals are not required to complete treatment, sobriety, or other programs before accessing housing.
 - The focus is on providing a stable, permanent home, rather than requiring individuals to meet specific criteria before receiving housing.
2. Client Choice and Self-Determination:
 - Individuals are given choices regarding their housing, including location, type of housing, and services they wish to access.
 - This empowers individuals to make decisions about their housing and life, promoting a sense of control and agency.
 - Client choice is often enabled through the provision of rent supplements or other financial assistance.
3. Harm Reduction/Trauma Informed Approach to Recovery:

⁵ <https://homelesshub.ca/collection/programs-that-work/housing-first/>

- Housing First programs are designed to support individuals in their recovery from homelessness and other challenges, such as mental health conditions and substance abuse.
- This includes providing access to mental health services, substance abuse treatment, and other supports that can help individuals achieve their recovery goals.
- Recovery is seen as a process of self-discovery, finding meaning and purpose, and managing mental health and/or addictions.

4. Individualized and Client-Driven Supports:

- Support services are tailored to the specific needs and goals of each individual or family.
- This ensures that services are relevant and effective, helping individuals to achieve their desired outcomes.
- Support teams are flexible and responsive to the needs of clients, adjusting their approach as necessary.

5. Social and Community Integration:

- Housing First programs promote social and community integration, helping individuals to build relationships, participate in community activities, and feel connected to their surroundings.
- This can involve facilitating access to community resources, helping individuals connect with social networks, and fostering a sense of belonging.
- The goal is to ensure that individuals are not isolated from their communities but rather are actively participating in and contributing to them.

Guiding Principle 2:

The Halifax Regional Municipality Coordinated Access System believes in equity and inclusivity in our work. Equity ensures fair treatment and opportunities for all, addressing historic and/or systemic barriers that have disadvantaged certain demographics. Inclusivity creates a welcoming and supportive environment where everyone is valued and respected, regardless of their background. Working from this lens, the HRM CAS promotes the fair treatment and full participation of all people, particularly groups that have been historically underrepresented or discriminated/disadvantaged due to biases and/or stereotypes about their race, ethnicity, gender, sexual orientation, religion, age, disability, socioeconomic status, immigration status, etc. The HRM CAS does not tolerate any forms of oppression or discrimination.

Guiding Principle 3:

The Halifax Regional Municipality's Coordinated Access System is committed to centering the lived experiences of marginalized populations, particularly Indigenous and Black communities, who are disproportionately represented in homelessness. This commitment includes upholding the principle of self-determination, defined as the right of individuals and communities to freely pursue their social, economic, and cultural development.

HRM CAS aims to amplify these voices through meaningful allyship, advocacy, and inclusive engagement practices. Recognizing that listening and learning from marginalized perspectives is an ongoing and relational process, this work is approached with patience, respect, curiosity, and a genuine commitment to learning. By fostering a culture of equity, inclusion, and solidarity,

HRM CAS strives to deliver services that are responsive to the needs of clients experiencing homelessness while actively working to dismantle the systemic barriers that contribute to housing insecurity.

As part of its commitment to equity, HRM CAS follows the principles of OCAP® – Ownership, Control, Access, and Possession⁶ – to respect Indigenous data sovereignty. These principles ensure that Indigenous communities have authority over how their data is collected, used, and shared. Any aggregate data collected through HRM CAS is considered to be under stewardship rather than ownership and is managed in accordance with OCAP® guidelines.

Guiding Principle 4:

The Halifax Regional Municipality Coordinated Access System asserts that participating agencies must work within the following tenets of local capacity and scope.

- Participating agencies in receipt of funding from the Nova Scotia Department of Opportunities and Social Development (OSD), Violence Against Women (VAW), Reaching Home, municipal or another funder for access points, day centres, outreach, supportive housing, and who participate in our HRM CAS must state in their policies that they are participating in Coordinated Access.
- Agencies as employers must support staff to work within the capacity of their project and role/position.
- Should a group not currently in receipt of funding from one of the above-mentioned housing and homelessness sector funders in Nova Scotia, a Community Partner's mandate, policies, and goals must align with all guiding principles and act in good faith to support agencies.
- Should questions arise that a current agency's processes are not working within these guiding principles, AHANS as Community Entity will approach to ensure alignment with Reaching Home directives, OSD and their directives, speak to applicable governance tables for suggested corrective action, and then the respective advisory board for final decision making.

Conclusion:

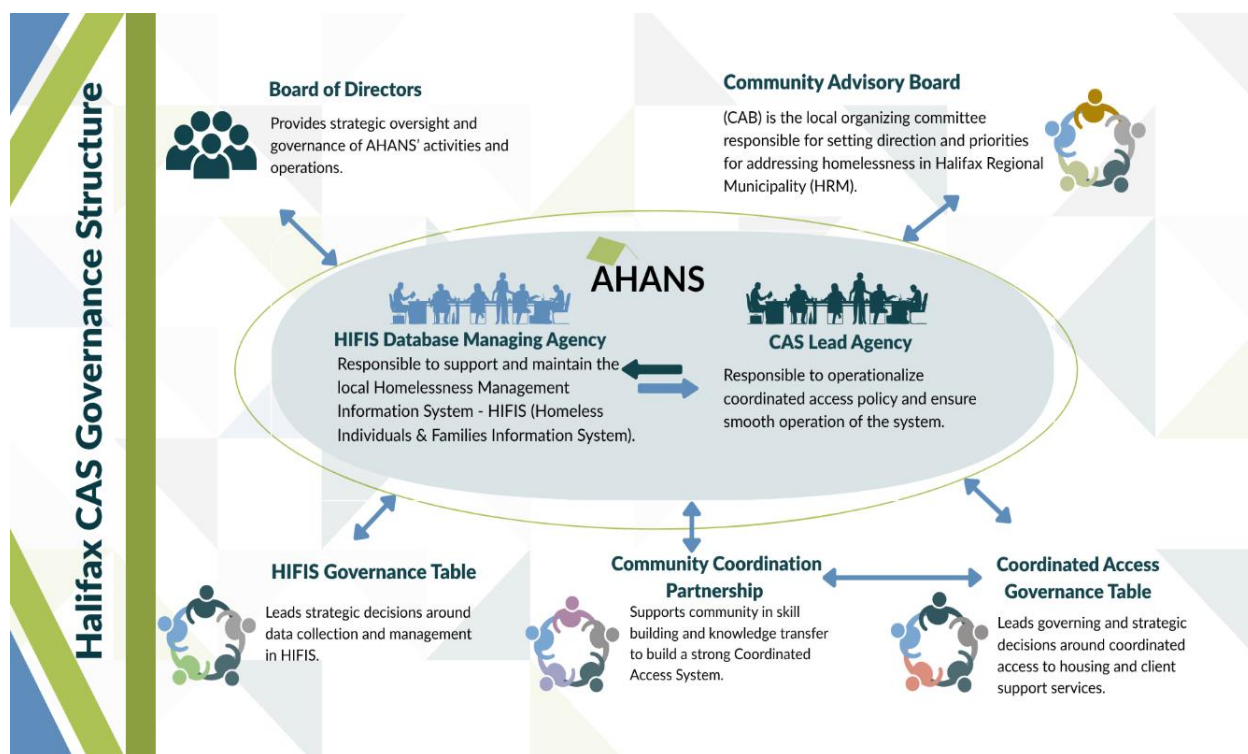
If your organization is interested in joining the Halifax Regional Municipality Coordinated Access System, it is an expectation of participation that your organization's mandate, core values and/or guiding principles align with the HRM CAS guiding principles to ensure an equitable system of care for all individuals and families experiencing homelessness in our community.

⁶ <https://fnigc.ca/ocap-training/>

Governance

Successful implementation of Coordinated Access 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 Coordinated Access 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 Coordinated Access 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 Database Managing Agency 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 Matching and Referral Table (not pictured) supports direct service delivery by being a connection between the system and the highest depth of need clients.

Community Entity

The Community Entity (CE) is an organization that enters into a funding agreement with Housing, Infrastructure and Communities Canada (HICC) 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 HICC 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 of Directors to report all progress towards Reaching Home outcomes and the Board of Directors has 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 primary purpose of the CAB 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.

HIFIS Database Managing Agency

The HIFIS Database Managing Agency supports the set-up, implementation, and ongoing maintenance of HIFIS for all agencies participating in CA. The HIFIS support team 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. In Nova Scotia, the HIFIS Database Managing Agency is the Affordable Housing Association of Nova Scotia (AHANS).

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 coordinated access system. In the Halifax Regional Municipality, the Coordinated Access Lead Agency is the Affordable Housing Association of Nova Scotia (AHANS).

Community Coordination Partnership

A Community Coordination Partnership was developed to support skill building, knowledge transfer, and to help the ongoing development and strengthening of the HRM Coordinated Access System. As a frontline service agency, this work is being led by YWCA Halifax.

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).

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

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

Data and Community Coordination

Homeless Individuals and Families Information System (HIFIS)

The Homeless Individuals and Families Information System (HIFIS) is a Homelessness Management Information System (HMIS) developed by the Government of Canada to support the day-to-day operational activities of Canadian homelessness service providers. As a web-based comprehensive data collection and case management system, HFIIS enable participating service providers within the same community to access, collect and share real time homelessness data to ensure individuals and families accessing services are prioritized and referred to the appropriate services at the correct time. The HIFIS Support Team at AHANS 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 capture the story of individuals and families experiencing homelessness in HRM. The quality of data is determined by assessing three characteristics - timeliness, completeness, and accuracy.

Matching and Referral Table

A Matching and Referral Table, made up of Housing Program Managers/Supervisors will meet monthly to discuss program (unit and caseload) vacancies, debrief on previous referrals, request and/or identify program transfers, and review By-Name List clients for referrals. The Matching and Referral Table can meet as needed for special circumstances.

Governance Policies

Policy #G001 Community Advisory Board (CAB)

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)

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 CAS in support of the CAS Lead Agency.

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

Procedure:

The CAS Governance Table (CAS-G) shall support 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)

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 the CAS Lead Agency and the HIFIS Database Managing 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/Interagency Data Sharing Agreement

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

Agencies cannot receive Reaching Home funding without a signed community data sharing agreement in place.

Procedure:

The Community Entity shall carry out annual audits of service provider information to ensure that every agency participating within CAS have a signed Community/Interagency Data Sharing Agreement.

Policy #G005 BNL Data Management (HIFIS)

In Halifax Regional Municipality, the system used to manage By-Name List (BNL) information and data about the individuals and families experiencing homelessness in the region shall be the Homeless Individuals and Families Information System (HIFIS). Additionally, the BNL is maintained in an Excel document – *this process will be phased out as data integrity in the HIFIS database is confirmed.*

Information shall be kept up-to-date and consistent in HIFIS, and all agency staff will enter data into the system no later than five (5) business days 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 five (5) business days after client contact or according to the standards of their agency – whichever is less.

The data required in HIFIS to populate the BNL includes all information captured in the BNL Referral package (refer to **Appendix B: BNL Referral Package**). This information is collected in HIFIS through the client details section, housing history, client consent and the supplementary BNL Survey.

Policy #G006 Data Maintenance (HIFIS)

The HIFIS Database Managing Agency shall provide a HIFIS Support Team 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 Support Team within one to five (1-5) business days depending on the urgency and nature of the request.

Procedure:

If a staff member requires technical support with a HIFIS related issue, they should contact the HIFIS Support Team at HIFIS@ahans.ca. When required, the local HIFIS Support Team will escalate items to the HIFIS National Support Team.

Policy #G007 HIFIS Support Team

The HIFIS Database Managing Agency shall provide a HIFIS Support Team that will oversee the set-up, implementation, and ongoing maintenance of HIFIS for all agencies participating in Coordinated Access. HIFIS shall also have a governance table, and it shall be the responsibility of the HIFIS Database Managing Agency to set it up and coordinate its operation.

The HIFIS Support Team, supported by the HIFIS Governance Committee, shall be responsible for all HIFIS communication strategies, privacy framework, policies and procedures, and ongoing maintenance of data.

Procedure:

HIFIS Database Managing Agency will work within their organization and liaise with all organizations to ensure there is access to HIFIS across the HRM CAS.

Contact: HIFIS@ahans.ca

Policy #G008 Identified HIFIS Privacy Officer at each Agency

Each organization shall identify a HIFIS Privacy Officer to act as liaison and is responsible to coordinate their services and operations with the HIFIS Support Team and connect monthly or as needed to ensure the optimal operation of HIFIS within their agency.

Procedure:

The HIFIS Database Managing Agency will liaise with all designated HIFIS Privacy Officers to ensure there is access to HIFIS across the HRM CAS. Any changes to the designated HIFIS Privacy Officer must be communicated to the HIFIS Support Team within two (2) business days of that change.

Policy #G009 CAS Oath of Confidentiality and HIFIS User Agreement

All staff participating in CAS and accessing HIFIS are required to sign the CAS Oath of Confidentiality and a HIFIS User Agreement before they are provided with the corresponding system credentials. Organizations may maintain these documents for all staff for their own records, but copies must be provided to and securely held by the CAS Lead Agency (for CAS Oath of Confidentiality) and the HIFIS Database Managing Agency (for the HIFIS User Agreement). Users that work at multiple agencies will be required to sign a separate HIFIS User Agreement for each agency at which they are employed prior to being granted HIFIS access for that agency.

See also [Policy #H007 HIFIS User Agreement](#).

Procedure:

Upon completion of the BNL Referrals training and supplementary CAS orientation video, all staff whose role will require them to participate in CAS will sign the CAS Oath of Confidentiality and return it to the CAS Lead Agency. Staff whose role requires them to use HIFIS will sign a HIFIS User Agreement for each agency where they work and return it to the HIFIS Database Managing Agency prior to being granted HIFIS access for that agency.

The format and wording of these documents may change periodically to ensure consistency with best practice across the sector. If this occurs, the HIFIS Database Managing Agency and/or the CAS Lead Agency 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 #G010 Privacy and Protection of Information/ Client Consent

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 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 complete and sign the Common Consent Form. Please refer to **Appendix C: HRM CAS Common Consent Form**.

Policy #G011 Verbal Consent

In some situations, staff may not be able to obtain signatures from clients on Coordinated Access related consent forms, and verbal consent from clients may be temporarily required.

Procedure:

Staff members who receive verbal consent must sign and date in lieu of the client's name, indicating verbal consent. Within thirty (30) days of verbal consent, a follow-up in-person meeting must be conducted with the client to capture written consent. Exceptions can be made in instances of incarceration, medical treatment requiring long-term stays, participation in programming for substance use, etc. In these scenarios, a follow up in-person meeting must be conducted with the client to capture written consent within thirty (30) days of discharge from the program/facility/treatment.

Policy #G012 Consent Withdrawal

In some situations, clients may wish to withdraw their consent. Withdrawal of consent is facilitated by completion of the Common Consent Withdrawal Form. Consent withdrawal must be written (verbal withdrawals will not be accepted) and will be effective from the date of the signed form, will not apply to information which was previously shared and will not be retroactive. If a client re-engages in service, a new consent form will be required. Refer to **Appendix C: HRM CAS Common Consent Form**.

HIFIS Policies

Policy #H001 Creating a New User/ Training of New Users

Any staff working at a HIFIS using agency who is required to use HIFIS as part of their role and responsibilities is required to have their own user account and to complete applicable HIFIS training.

Procedure:

The Executive Director or designated senior management staff of the HIFIS using agency will complete the HIFIS Support and Training Request Form. If the agency is unsure which training option is suitable, contact the HIFIS Support Team directly to receive a document outlining the training options. Upon receipt of the HIFIS Support and Training Request Form, the HIFIS Support Team will provide access to the online, on demand training option selected directly to the new user. Upon completion of training(s), the user must provide certificate(s) of completion to the HIFIS Support Team to initiate creation of their HIFIS user account. User accounts will be created within three (3) business days of receipt of certificate(s).

Policy #H002 Naming Conventions for Users/ Credential Distribution

Upon receipt of the training certificate(s) of completion, new user accounts will be created by the HIFIS Support Team. The naming convention for accounts will be first initial of first name and last name. If another user with the same name already exists in HIFIS, the account will be created with the first name and last name initial. If both instances exist, numbers will be added to the end of first initial first name/last name configuration, starting at 01.

Procedure:

Login credentials for new users are sent via a two-step verification process. A secure link with the user credentials will be sent via email. An agency provided email address is required for this process; personal emails or generic agency email addresses will not be accepted. A passcode to access the secure link will be sent via text message. Once the user accesses HIFIS with the temporary password, HIFIS will immediately prompt them to change their password.

Note: The user's supervisor (as listed on the HIFIS Support and Training Request Form) will be CC'd on email correspondence for user training and account activations.

Policy #H003 Inactive User Accounts/ Reactivation

If a user does not log into their HIFIS account for ninety (90) days, the user is considered inactive, and the account is deactivated. Accounts can be reactivated upon request; however, refresher training may be required depending on length of inactivity.

Procedure:

If an account requires reactivation, the staff member must contact the HIFIS Support Team via the [HIFIS Support and Training Request Form](#). The HIFIS Support Team will respond within two

(2) business days to reactivate the account. If the account is inactive for more than six (6) months, the staff member will require a refresher training session prior to reactivation. For information on HIFIS training, refer to [Policy #H001 Creating a New User/ Training a New User](#).

Note: Refresher training can also be requested by the Executive Director or designated senior management of the HIFIS using agency or by the staff member, if deemed necessary.

Agencies are responsible for notifying the HIFIS Database Managing Agency within two (2) business days of leaves of absence (greater than 90 days) and staff resignations/terminations to ensure those accounts are deactivated to enhance data security.

Policy #H004 Changes to User Rights

HIFIS user rights differ based on the role and responsibilities of users. If a staff member moves to a new position, they may require a change to their user rights.

Procedure:

If a staff member is changing positions within an agency and requires additional/new user rights, their Executive Director or designated senior management staff will use the [HIFIS Support and Training Request Form](#) to request these changes. For definitions of user rights, please refer to **Appendix G: HIFIS User Rights Descriptions**.

Policy #H005 Password Reset/ Locked Account

User accounts will become locked after too many failed login attempts. If a user cannot remember their password, they can request a password reset prior to becoming locked out.

Procedure:

If a user requires their account to be unlocked or their password reset, they must complete the [HIFIS Support and Training Request Form](#). Account unlocking will be completed within two (2) business days. Password resets are completed via a two-step verification process. A secure link with the user credentials will be sent via email. An agency provided email address is required for this process; personal emails or generic agency email addresses will not be accepted. A passcode to access the secure link will be sent via text message. Once the user accesses HIFIS with the temporary password, HIFIS will immediately prompt them to change their password.

Note: The user's supervisor (as listed on the HIFIS Support and Training Request Form) will be CC'd on email correspondence for password resets and account unlocking.

Policy #H006 HIFIS Account Setup for Users Working at Multiple Agencies

HIFIS users who work at multiple agencies will have only one (1) HIFIS user account which can be used to access additional agencies as required.

Procedure:

If an existing HIFIS user begins working at an additional agency, they will submit the [HIFIS Support and Training Request Form](#) to request the additional access. Although their account will provide access to all agencies at which the user is employed, they will only be able to access one agency at a time when they log in. It is the user's responsibility to ensure that they are accessing the correct agency at the time they are working and that they adhere to the policies and procedures of their organization(s) as well as the HIFIS User Agreement.

In the event that a user stops working at a given agency and the employer notifies the HIFIS Support Team to deactivate their account, users working at multiple agencies will only have access removed from the agency where they are no longer working. All other access will remain unchanged.

Policy #H007 HIFIS User Agreement

All staff accessing HIFIS are required to sign a HIFIS User Agreement upon training completion and before they are provided with system credentials. Organizations may maintain these documents for all staff for their own records, but a copy must be provided to and securely held by the HIFIS Database Managing Agency. Users that work at multiple agencies will be required to sign a separate HIFIS User Agreement for each agency at which they are employed prior to being granted HIFIS access for that agency.

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

Procedure:

New HIFIS users will send their signed HIFIS User Agreement and HIFIS training certificate(s) of completion to HIFIS@ahans.ca to obtain their new username and temporary password. Existing users requesting additional access when beginning work at an additional agency will be required to sign and submit an additional HIFIS User Agreement for each additional agency prior to being granted additional access.

Policy #H008 Data Breaches

Data breaches are defined as unauthorized access to or collection, use, disclosure, or disposal of personal information. HIFIS data breaches shall be immediately reported via telephone and/or email to the HIFIS Database Managing Agency/HIFIS Support Team as well as the designated HIFIS Privacy Officer for the agency in which the breach occurred. The affected agency's internal privacy breach protocol must also be followed.

Procedure:

The HIFIS Support Team must immediately initiate the [Breach Management Protocol](#) established by [Office of the Information and Privacy Commissioner for Nova Scotia](#).

Within ten (10) business days of the data breach, the agency that experienced the data breach and the HIFIS Database Managing Agency will complete a follow up discussion and auditing of the incident to identify opportunities for additional safeguards to enhance data protection.

Policy #H009 Recording Client Housing History

All clients who are entered into HIFIS should have their housing history populated for, at minimum, the previous twelve (12) months. At any time, clients should either have an active housing history record or be booked into an emergency shelter via the admissions module.

Any HIFIS user who is working with a client is responsible to ensure that their Housing History remains up to date and must enter any changes to the client's housing history within five (5) days of notification of the change.

The HIFIS Database Managing Agency will monitor for accuracy.

Procedure:

In accordance with the HIFIS User Guides, when staff begin to work with a client, they must record their current or most recent housing situation in the *Housing History* module in *Client Information*. Record the housing type, and a start date corresponding to when they began having that housing situation.

- **Example:** if they are currently unsheltered and have been sleeping rough for 1 week, enter a Start Date corresponding to 1 week ago and a blank End Date.

If they have very recently vacated their place of residence and have no current place to sleep, record the most recent housing type, with an accurate Start Date and End Date.

- **Example:** if they got evicted this morning, record their housing type from where they were living, enter a Start Date corresponding to when they began living there and an End Date equal to today.

Note: If the client is recorded as having a shelter stay in the admissions module, then staff do not need to add a Housing History record corresponding to the shelter stay. **However**, if they are staying in an emergency shelter that is not participating in community data sharing, HIFIS does not already know that the client is staying in a shelter, so staff would need to add a Housing History record to indicate this.

If staff update a client as housed through the *Housing Placements* module, staff need to add an End Date to the client's previous Housing History record. The *Housing Placements* module will add a new Housing History record (corresponding to their new housing) automatically.

The Housing History Report in HIFIS must be run by supervisors and managers (or the designated HIFIS Privacy Officer) with reporting rights by the 21st of every month to identify clients with incomplete Housing History records. Supervisors and managers will then follow-up accordingly with staff.

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 points 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 provides 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 A** for the current list of access point agencies.

Access Policies

Policy #A001 Determination of Homelessness in the HRM

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 Referral and be added to the BNL.

Procedure:

When an individual or family presents as homeless at an access point and would like to do a referral, the agency should check to see:

- Is the individual or family eligible for the BNL?
- Is the individual or family already on the BNL?

If they are eligible and have not completed a Coordinated Access Referral already, a Referral can be completed (see [Policy #A003 Coordinated Access Referral 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 or consent has expired during the period of inactivity, all consent forms shall be completed again.

Policy #A002 Coordinated Access and By-Name List Referral Training

CAS orientation and BNL referral 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 Referral as part of their onboarding process.

Procedure:

CAS orientation and BNL referral training takes place in two parts. For staff who will be conducting client referrals, they are required to complete both training sessions and sign the CAS Oath of Confidentiality prior to completing referrals with clients.

BNL referral training is hosted by the YWCA of Halifax Coordinated Access System Community Coordination Partnership team, with support from AHANS. The session outlines the referral package and reviews the documents required. Upon completion, staff will also review the CAS orientation video, which is available on the AHANS website.

For anyone who is interested in learning more about coordinated access in HRM but will not be required to do BNL referrals in the scope of their work, they are welcome to view the CAS orientation video at any time.

Policy #A003 Coordinated Access Referral Process

All agencies participating in CAS must complete referrals in the same manner.

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

Any variations to process must be approved by the CAS governance table, implemented by the CAS Lead Agency and must be system wide. The CAS Lead Agency is responsible for ensuring that variations align with federal requirements before governance approval.

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:

- By-Name-List Referral form/HIFIS input
- HRM Common Consent Form
- VI-SPDAT triage

The referral and triage process will take between 30 to 60 minutes and clients need to be advised prior to starting. Clients may decide to complete the BNL referral form/HIFIS input and the common consent form at the same time and at a later point, complete the VI-SPDAT. At the beginning of the process, staff should also advise clients that CAS is not a guarantee of housing and that they should also continue to try to find resolutions to their own homelessness.

Once the forms have been completed, staff should ask clients to continue to maintain contact (at minimum, monthly) so they can be easily reached if an offer of placement becomes available or to update their situation or contact information if anything changes.

Client information may be entered directly into HIFIS as the information is collected from the client but must be entered into HIFIS within five (5) business days of form completion.

Any variations to process must be approved by the CAS governance table, implemented by the CAS Lead Agency and must be system wide. The CAS Lead Agency is responsible for ensuring that variations align with federal requirements before governance approval.

Policy #A004 Referral Documents

The referral shall consist of completion of the following documents:

- HRM Common Consent Form
- Coordinated Access Referral Form
- VI-SPDAT

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 CAS Lead Agency, under the recommendations and approval of the CAS-G.

Procedure:

See the procedure for ***Policy #A004 Coordinated Access Referral Process***.

Policy #A005 Anonymous Clients Added to HIFIS and/or By-Name List

When a client chooses to be added to HIFIS and/or the By-Name List as *Anonymous*, it is their right to do so. For Halifax Regional Municipality, the Unique Identifier will be the HIFIS Client ID. If the client has consented to being on the BNL but not to have their information entered into HIFIS, the Unique Identifier will be generated by the BNL Coordinator using a cumulative number count (i.e., AC0000001, AC0000002, and so on).

Procedure:

When a client has requested to remain Anonymous and has consented to both BNL and HIFIS, the staff member will enter the client information into HIFIS but will enter the name as “Anonymous Anonymous”, noting the Client ID number that is generated with the new client data entry. This information must then be forwarded to the BNL Coordinator, with the client’s actual full name, to be tracked and securely stored outside of HIFIS. If the client has consented to being on the BNL, but not to having their data in HIFIS, the staff member will contact the BNL Coordinator to advise of this, and the BNL Coordinator will provide a unique identifier based on the cumulative numbering system noted above. If an anonymous client is matched for a vacancy, the BNL coordinator will contact the agency/staff person who added the client to the BNL. It is then the agency/staff person’s responsibility to contact the anonymous client to advise them of this potential resource and to confirm if they are still interested. The agency/staff person must then follow up with the BNL Coordinator to advise of the outcome of the conversation. If the client chooses to accept the resource, and the agency with the vacancy differs from the agency that initially added the client anonymously, the original agency/staff person will contact the agency with the resource to plan a warm transfer of the client to the agency with the resource.

Anonymous client information will be held confidentially by the BNL Coordinator in a secure manner. If agencies choose to keep anonymous client information on file internally, it is expected that all privacy protocols will be followed, including but not limited to, secure computer and/or online platform, locked cabinet for physical files, limited staff access, and appropriate disposal procedures when required.

Policy #A006 Client Refusal to be Added to the BNL

A client must 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 a Referral, agency services are provided without penalty, but they cannot be offered a Referral into CAS and the BNL. Clients should be advised that if they change their mind and still meet all criteria, a Referral can be completed later.

If the client declines due to safety and privacy concerns, see [Policy #A005 Anonymous Clients Added to HIFIS and/or By-Name List](#). The client they may be entered into the system without identifying information.

Policy #A007 Referrals for Individuals Fleeing Violence

Individuals fleeing violence may be tracked anonymously and an anonymous, non-identifying referral process shall be used to enhance their safety and confidentiality following the procedure outlined in [Policy #A006 Anonymous Clients Added to HIFIS and/or By-Name List](#)

Policy #A008 Client Inactive Status

Individuals and families that have not had contact with their support agency, a transaction with a participating coordinated access agency or an emergency shelter in HIFIS 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 are deceased shall be considered **Inactive**.

For transactions/actions in HIFIS that maintain client active status, please refer to the service table below. Please note that not all service providers will have access to all of these transactional options, this full and comprehensive table outlines all types of transactions, but access will be dependent upon the type of service provider (emergency shelter, supportive housing, etc.) and the user rights of the user (housing support, shelter worker).

Table 1: Service Table – Transactions that keep or return Clients to “Active”	
Module	Transaction
Admissions	Client is booked into a shelter bed
Assessment	Assessment is conducted (SPDAT, VI-SPDAT, VAT)
Calls and Visits Log	New record (Add Log) in Call and Visits Log is created
Case Management	New record (Add Case) in Client – Case Management List is created
Case Management	New record (Add Session) under the Sessions tab in Display Case Management List is created
Case Management	New record (Add Comment) under the Case Comments tab in Display Case Management List is created
Food Banks	New record (Add Food Bank Transaction) in Client – Food Banks is created
Goods and Services	New record (Add Goods and Services Transaction) in Client – Goods and Services is created

Group Activities	Client is identified as an Attendee in a Group Activity
Housing Placements	New record (Add Housing Placement) in Housing Placement List is created
Housing Placements	New record (Add Follow-up or Add Housing Placement Attempt) in Housing Placement Details is created
Housing Loss Prevention	New record in Housing Loss Prevention List is created
Medication Dispensing	Client is provided medication through Medication Dispensing in Front Desk – Medication Dispensing
Service Restrictions	New record (Add Service Restriction) in Client – Service Restrictions is created
Storage	New record (Add Storage Item) in Client – Storage is created
Survey	Client takes a survey in Client Management – Survey
Notes The following actions do not affect Client State: • Viewing and/or editing client information under Client Information • Identifying a client in a Bulletin or Message	

Procedure:

The HIFIS Privacy Officer at each service provider will run the “Clients Approaching Inactivity” report every forty-five (45) days to ensure that all active clients on their agency’s caseloads remain active in HIFIS and thus, the By-Name List.

If there is concern that a client has not been in contact for ninety (90) days, every effort must be made by the service provider 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 as permissible contacts
- Asking Street Outreach to connect with them if applicable

If the above efforts do not result in contacting the client, the client’s status on the BNL will change to **Inactive** after ninety (90) days of no contact/ no updates in HIFIS.

Policy #A009 Client Removal from the BNL

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 via the Consent Withdrawal Form, please refer to [Policy #G012 Consent Withdrawal](#).

Policy #A010 Client Reinstatement to the BNL

When an individual or family who was previously on the BNL but became **Inactive** requests to re-engage with a service agency, they will automatically be readded to the BNL with a valid HIFIS update if their previous consent has not yet expired. If their previous consent was withdrawn or has since expired, the service agency will need to obtain a new signed consent prior to the client being reactivated on HIFIS and the BNL.

Procedure:

The process to reinstate a client to the BNL is the same as it would be to add them to the BNL for the first time. Please see

Policy #A011 Death of a Client on the BNL

When a client support agency becomes aware of the death of a client that is on the BNL, they must attempt to confirm the death. If it can be confirmed, they shall immediately change the client's status to **Deceased** in HIFIS in addition to any organizational procedures that would take place following the death of a client. If it cannot be confirmed that the information is accurate, the client will be treated as **No Contact** until such time that the client's status can be confirmed.

Procedure:

If a client is believed to have passed away, but documentation is not available to confirm this, the support agency should add notes as to why the client is thought to be deceased. They must also ensure all cases are closed and then email the BNL Coordinator at CAS@ahans.ca to request the client be made **Inactive**.

Policy #A012 Client Inquiries Regarding BNL Status and Process

Individuals and families have the right to inquire at any time as to their BNL status by connecting with their support agency. Any staff with HIFIS access will be able to validate if a client is on the BNL by confirming the following details in HIFIS –

1. Is the client state active?
2. Is the client housing status homeless?
3. Is the client consent type explicit + coordinated access?

“Status” means telling a client if they are “Active or Inactive.”

Because the BNL is not a waitlist but rather a dynamic, prioritized list 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 or 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 referral 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.

Common Triage/Assessment

Common triage/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 triage/assessment tools are critical to CAS. They ensure communities are asking the right questions to understand people's strengths, vulnerabilities, and risks. Common triage/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 triage/assessment. It is important to respect a client's right to refuse triage/assessment or other services.

Triage and Assessment Policies

Policy #TA001 Common Triage Tool

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

Procedure:

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

Policy #TA002 Refusal to Complete Common Triage

Individuals have the right to refuse to complete a common triage.

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 – you may ask them if they prefer that.

If the client completely refuses to complete the common triage, their refusal should be noted in HIFIS. The client will still be eligible for referral to the BNL.

Policy #TA003 Clients Not Currently Experiencing Homelessness

Clients may complete the referral and assessment for the BNL if they are at imminent risk of experiencing homelessness, however they will not be added to the BNL until such time that they are confirmed to be experiencing homelessness.

Procedure:

Agency staff may complete the referral but should not input it into HIFIS until homelessness is confirmed.

Prioritization

In the context of homelessness, prioritization refers to the process of determining which individuals or families experiencing homelessness should receive available housing and support services first, based on their level of vulnerability and need. This process is intended to allocate finite resources to those most in need and at the greatest risk of harm due to their ongoing experience of homelessness.

The prioritization matrix for Halifax Regional Municipality is developed by a community survey process and re-evaluated every two (2) years to ensure it meets the changing needs of the community. The first two priorities for all Reaching Home Designated Communities are individuals experiencing chronic homelessness and Indigenous individuals. As part of the HRM Community Plan, and in direct relation to the disproportionate number of Black/African Nova Scotians experiencing homelessness, this population is also a top priority that is included in the matrix prior to community surveying.

The current HRM Prioritization Matrix is attached in **Appendix H**.

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 CAS Lead Agency 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 the CAS Lead Agency in writing by each housing and /or support resource on an annual basis. Any changes to these criteria shall be submitted to the CAS Lead Agency in writing within five (5) days of the change.

Policy #P002 Prioritization Procedure Matching

The Prioritization Matrix used to match clients with resources through the Coordinated Access System shall be developed and reviewed, every two (2) years, by the CAS Governance Committee, with the support of the CAS Lead Agency.

Procedure:

Every eighteen (18) months from the approval and implementation of the Prioritization Matrix, the CAS Governance Committee, with the support of the CAS Lead Agency, will convene a process to review and update the Prioritization Matrix (example: community wide survey on priorities). Once reviewed, analyzed and approved by Governance, the Matrix will be distributed community wide and implemented immediately.

Policy #P003 Other Service Provider Priorities/Service Restrictions

No other priorities, other than the ones listed in the Prioritization Matrix, shall be applied to the prioritization process. Service Provider eligibility requirements are to be applied prior to prioritization and there shall be no further screening of clients once matched to a resource or housing placement.

Procedure:

If a client has a service restriction at a specific service provider, staff at the provider must enter the service restriction into HIFIS to ensure that those clients are not offered resources at service providers they cannot access. If the agency does not use HIFIS, the service restriction must be provided to the BNL Coordinator in writing within two (2) business days of the identified service restriction.

If a service provider requires adjustment to their eligibility criteria, this must be submitted to the CAS Lead Agency in the same manner as the annual submission of eligibility criteria per [Policy #P001 Agency Eligibility Requirements](#).

Vacancy Matching and Referrals

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 interagency 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 CAS Lead Agency in writing. This includes acuity, demographics, support requirements as well the acceptable time frames for reviewing and communicating matching decisions. The CAS Lead Agency will maintain this information and updates must be provided on an annual basis or when criteria changes.

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 Matching and Referral Process and Program Transfers via Coordinated Access Processes

A Matching and Referral Table, made up of Housing Program Managers/Supervisors will meet monthly to discuss program (unit and caseload) vacancies, debrief on previous referrals, request and/or identify program transfers, and review BNL clients for referrals.

In addition, the Matching and Referral Table can meet as needed for special circumstances.

Clients that are matched to other housing programs that are better suited to their needs (lesser support or more wraparound support, for example) do not need to be placed back on the By-Name Prioritization List.

Procedure:

A Coordinated Access Matching and Referral Table made up of Housing Program Managers/Supervisors that meets regularly would review:

1. Program (Unit and Caseload) Vacancies – these are known in advance of the matching and referral meeting.
2. Results of Pending Referral Activities – matches that were identified during the previous matching and referral meeting are debriefed, identifying which referrals were successful, which are still pending, and which were declined by the client or by the receiving housing program.
3. Program Transfers – these clients are matched to available program vacancies prior to By-Name List clients being discussed. Rationale for the program transfer request will be provided during the meeting. Matching and referrals are made for these clients to transfer to another housing program/service that best meets their needs.
4. BNL Clients – remaining housing vacancies are then matched to BNL clients.

Matching and Referral Table participants must follow a triage model for prioritization based on the community level prioritization matrix to ensure that the most vulnerable households are matched to a housing program vacancy first. While commitment to the Housing First triage model ensures that those with the longest history of homelessness and highest depth of need are prioritized, consideration will still be made for eligibility in the program vacancy.

Policy #V002 Notification of Vacancies

Support and housing providers shall notify the BNL Coordinator when housing and caseload vacancies occur or are expected to occur. Vacancies should always be filled through the CAS process.

Procedure:

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

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

Policy #V003 Vacancy Filtering/Matching

All vacancy matching shall be filtered according to provider eligibility, prioritization 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 BNL Coordinator will filter the list of names provided to an agency as follows:

- **Provider agency eligibility** (according to annually submitted eligibility criteria)
 - demographics (e.g., age and gender)
 - acuity level (high, medium, or low)
 - unit requirements (e.g., accessibility)
 - others as required
- **Prioritization Matrix**
- **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 #V004 CAS Matching Process and Timeline

When the service provider informs the BNL Coordinator of a vacancy on a support caseload or in a supported or scattered-site housing unit, the BNL Coordinator shall provide the client support or housing provider with names, based on the prioritization filters, the program or housing eligibility criteria, and client choice for this vacancy. This match will be provided within two (2) business days of the request.

Procedure:

When a vacancy is available, the BNL Coordinator will provide the service provider with names from the BNL that matches the criteria of the program for each vacancy no later than two (2) business days after receiving the request.

The BNL Coordinator will take measures to ensure that no names are provided for vacancies that have been restricted from the agency providing the resource.

Policy #V005 Client Notification Process and Timeline

The agency providing the resource shall attempt to connect with the client for five (5) working days before a new name is matched off the list.

Procedure:

When a client is matched to a resource, the agency providing the resource 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) working days, the agency providing the resource will advise the CAS Lead Agency with a status update indicating that the client has not been reached. If the client is reached within the specified period but requires additional time to make a decision, the agency providing the resource will update the CAS Lead Agency that additional time is required. If a client is not located, they cannot be penalized for this - they will be offered the next available resource that they are matched with. In a situation where a client cannot be located, the BNL Coordinator will provide a new match to the agency providing the current resource.

Policy #V006 Client Accepts a CAS Housing Resource

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

Procedure:

Once the placement has been accepted, the provider agency will update the client's housing history in HIFIS. If the provider agency does not use HIFIS, they must provide an update to the BNL Coordinator, indicating that acceptance, within two (2) business days.

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

Policy #V007 Client Choice in Matching and Referral Process

All clients have the right to choice. They can refuse a vacancy at any time without penalty or reprisal. A client who declines a vacancy shall remain on the BNL with impunity 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 agency providing the resource will inform the BNL Coordinator. The refusal of the resource will be recorded, and the client will remain on the BNL to be matched again. The BNL Coordinator will document all refusals for CAS resources offered to a client.

Should a significant number of refusals be tracked for the same client, the BNL Coordinator will contact the client's supporting agency to determine next steps. If no action plan can be developed, the client may be referred 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 can refuse Case Conferencing and will remain on the BNL with impunity.

Policy #V008 Client Cannot be Reached to Offer a CAS Resource

A client who cannot be reached to accept or deny client support or a housing benefit shall remain on the BNL with impunity.

Procedure:

After attempting to contact the client daily for five (5) business days, the provider agency will supply the CAS lead agency with a status update indicating that the client has not been reached. If the client cannot be contacted, the CAS lead agency shall update the BNL to reflect that the client was not matched with a resource. The client will remain on the BNL with impunity.

Appendix A: Access Points and Outreach

Individuals and families in Halifax Regional Municipality may access services, including referrals into the Coordinated Access system and By-Name List at the following locations:

- 902 Man Up
- Adsum for Women & Children
- Affirmative Ventures
- Affordable Housing Association of Nova Scotia
- AKOMA
- Association of Black Social Workers
- Atlantic Community Shelters Society
- Beacon House
- Chebucto Connections
- Coverdale Justice Society
- Dalhousie Housing Support
- Elizabeth Fry Society of Mainland Nova Scotia
- Freedom Foundation of Nova Scotia
- Halifax Refugee Clinic
- HRM Homelessness Team
- John Howard Society of Nova Scotia
- Mi'kmaw Native Friendship Centre
- North End Community Health Centre
- Old School Community Gathering Place
- Phoenix Youth Programs
- Salvation Army
- Shelter Nova Scotia
- Souls Harbour Rescue Mission
- Stepping Stone
- Tawaak Housing Association
- VETS Canada
- Welcome Housing and Support Services
- YWCA of Halifax

Appendix B: BNL Referral Package

HRM By-Name List Referral Form

(to be completed by staff and client together)

Personal Information		Unique Identifier: (Provided by AHANS)	
First Name:	Last Name:		
Alternative name/Nickname/Alias:	Date of birth: YYYY – MM – DD	Current age:	
Gender:	Pronouns:		
Are you a member of the 2SLGBTQIA+ community: ☐ Yes ☐ No			
Are you a veteran or have you previously served in the Canadian Armed Forces/RCMP? ☐ Yes ☐ No			
Do you have a disability that <u>impacts</u> your ability to find or maintain housing? ☐ Yes ☐ No			
Do you identify as Indigenous? ☐ Yes ☐ No			
If yes:			
☐ First Nations: Off-reserve	☐ Métis	Do you have proof of ancestry: ☐ Yes ☐ No	
☐ First Nations: On-reserve	☐ Non-Status	Please specify the Indigenous community you're connected with:	
☐ Inuit			
Do you identify as African Nova Scotian (with historical roots in Nova Scotia)? ☐ Yes ☐ No			
If yes, please specify the Black Nova Scotian Historical Community you are connected to _____			
What is your current citizenship/immigration status?		What ethnicity do you identify with?	
☐ Canadian Citizen - Born in Canada		☐ Arab (e.g., Syrian, Egyptian, Yemeni)	
☐ Canadian Citizen - Born Outside of Canada		☐ Asian- south-east (e.g., Filipino, Vietnamese, Cambodian, Malaysian)	
☐ Permanent Resident / Immigrant		☐ Asian-East (e.g., Chinese, Korean, Japanese)	
☐ Refugee		☐ Asian-South or Indo-Caribbean (e.g., Indian, Pakistani, Sri Lankan)	
☐ Refugee Claimant		☐ Asian west (e.g., Iranian, Afghan)	
☐ Student Permit		☐ Black-African (e.g., Ghanaian, Ethiopian, Nigerian)	
☐ Work Permit		☐ Black-Afro-Caribbean or Afro-Latinx (e.g., Jamaican, Haitian)	
What is your first language? _____		☐ Black-Canadian / American	
Are you comfortable speaking and understanding English? ☐ Yes ☐ No		☐ Latin American (e.g., Brazilian, Mexican, Chilean, Cuban)	
		☐ White (e.g. European, French, Ukrainian, Euro-Latinx)	
Are you applying as: (Please select only one)			
☐ Family ☐ Single Adult ☐ Youth (18-24) ☐ Couple (Please provide your partner's name: _____)			
If you are a family, how many children are in your household <u>under</u> the age of 18?			
If you are a family, how many children are in your household <u>over</u> the age of 18?			
Are any of your children currently involved with Child and Family Wellbeing Services (Child Welfare)/ Mi'kmaw Child and Family Services (MCFS) or in the care of another guardian or agency?			☐ Yes ☐ No
Are you a youth transitioning out of Child and Family Wellbeing Services (Child Welfare):			☐ Yes ☐ No
Are you currently pregnant? (Optional): ☐ Yes ☐ No ☐ NA		What is your due date? (Optional): YYYY – MM – DD	
Intake Service Provider Information			
Service Provider:		Staff name:	
Email:		Phone number:	
Program/Project:		Address:	

Contact Information	
Phone number: _____	
Email: _____	
What's the best way to reach you? <i>(Please check all that apply and fill in any details.)</i>	
☐ Do you prefer text messages only?	☐ Do you use email regularly?
☐ Safe to leave you a voicemail	☐ Do you have regular access to a phone or email?
☐ Do you have limited minutes or pay for incoming calls?	☐ Other (please explain): _____
Is there someone else we can pass messages through? If yes, who? _____	Phone number: _____

Current Sleeping Situation	
☐ Correctional facility	☐ Transitional Housing Program: Which one: _____
☐ Residential Treatment (addictions)	☐ Hospital ☐ Acute care
What is your expected release or graduation date? _____	
☐ Shelter/Funded Hotel Program: Which one: _____	
☐ Sleeping rough (e.g. car, tent)	☐ Couching ☐ Other: _____
☐ Inadequate housing <i>(If you select this option, please provide additional details. Incomplete information may affect eligibility)</i>	
When did you start staying in this location or situation? Date (approximate if unsure): YYYY - MM - DD	

Housing History		
1. How long have you experienced homelessness or being unhoused? Approximate start date: YYYY - MM - DD		
2. Where have you stayed during the last year, and for how long? <i>(Do not include times when you were renting)</i>		
Location or Situation	Approximate Dates (From)	Approximate Dates (To)
	YYYY - MM - DD	YYYY - MM - DD
	YYYY - MM - DD	YYYY - MM - DD
	YYYY - MM - DD	YYYY - MM - DD
	YYYY - MM - DD	YYYY - MM - DD
	YYYY - MM - DD	YYYY - MM - DD

Important Considerations for Housing and Support	
Do you have any long-term health conditions? (examples: diabetes, heart disease, asthma, or hypertension)	☐ Yes ☐ No
Details: _____	
Have you ever been diagnosed with or treated for a mental health condition? (examples: depression, anxiety, bipolar disorder, PTSD?)"	☐ Yes ☐ No
Details: _____	
Do you currently use alcohol, tobacco, or illicit drugs in a way that significantly impacts your life in a negative way?	☐ Yes ☐ No
If yes, <u>What</u> drug do you use? _____ How often? _____	
Are you willing to participate in harm reduction services and programs?	☐ Yes ☐ No
Are you in late-stage alcohol use?	☐ Yes ☐ No
Important Considerations for Housing and Support	

Have you ever been, or are you currently, involved in the criminal justice system? ☐ Yes ☐ No	Do you have current matters before the courts? ☐ Yes ☐ No If yes: ☐ Family Court ☐ Criminal Court ☐ Bail When is your next court date: YYYY – MM – DD Where is your next court date: _____
Are you currently experiencing any of the following types of violence?	☐ Yes ☐ No If yes: ☐ IPV ☐ Family Violence ☐ Gender Violence
Have you been, or are you currently, involved in sex work (in exchange for money, goods, shelter, or other needs)?	☐ Yes ☐ No

Housing Preferences	
If a rooming house or other shared living option were available, would you like to be considered for this type of housing?	☐ Yes ☐ No
Would you like to be considered for supportive housing, where some services and supports might be available on site?	☐ Yes ☐ No
Do you have pets: ☐ Yes ☐ No If yes, what kind? _____ How many? _____	
In some cases, housing options may not allow pets. Would you be open to discussing temporary or permanent re-homing of your pet if it meant securing housing?	☐ Yes ☐ No
Do you have any mobility needs that would require an accessible unit? ☐ Yes ☐ No	If yes, please feel free to share more about what type of accessibility features are important to you (e.g., no stairs, grab bars, elevator access, etc.): _____ _____
Are there any areas (neighborhoods) in the city you would prefer <u>not</u> to live in due to personal, safety, or other reasons?	
For any additional information that should be noted, please use the space provided on the next page.	

Support Preferences	
Would you be open to goal-settings/home visits once you're housed?	☐ Yes ☐ No
If yes, would you find it helpful to have the support of a Housing Support Worker (HSW) or Intensive Case Manager (ICM)?	☐ Yes ☐ No
Are you currently working with a Housing Support Worker? ☐ Yes ☐ No ☐ (Check if Yes). Do we have your permission to speak to this person regarding information in this form? Name: _____ Phone number: _____ Organization: _____	

Documentation Readiness	
<i>This refers to having the identification and paperwork often required to access housing and support services</i>	
Do you currently have any government-issued identification (e.g., health card, driver's license, provincial ID, immigration/refugee identity document issued by the federal government)?	☐ Yes ☐ No
Are you currently receiving or are you eligible for any income support (such as Income Assistance, CPP, disability benefits, employment income, etc.)?	☐ Yes ☐ No If yes, please specify: _____
Housing Programs	

When a unit that matches your preferences becomes available, your information from the By-Name List (BNL) may be shared with a service provider to explore housing options with you. This allows them to contact you about potential housing and available supports.

Are there specific support or housing programs you would like to be considered for when a vacancy becomes available?

-
-
-
-
-
-
-

Additional Notes

Is there anything else you'd like us to know that could help us find the best housing program or service provider for you? Please share anything that feels important to you here.

Appendix C: HRM CAS Common Consent Form

Halifax Regional Municipality

Housing & Homelessness System – Common Consent Form

Please read this form with a staff member. Interpreter and accessibility help are available.

Who are we?	We are a group of organizations in Halifax Regional Municipality working to help people find and keep safe housing and connect with local supports.
Why are we asking for your permission?	- This form asks for your permission to collect and store your personal information in a secure computer database called “HIFIS” the Homeless Individuals and Families Information System. - Our partner organizations (listed in Appendix A) can only access your information with your permission when you use their services. This means you will not have to repeat your story or fill out new forms at organizations if you give them consent to access your information. - With your permission, we can also add you to the By-Name List, which is a confidential list used to match people most in need with housing and support.
What information is being collected?	- Most often, we collect your name, basic details, and contact information. Sometimes, if needed, we may ask about your health or legal situation. - For a list of the minimum information we collect, see Appendix B.
Who will we share your information with?	- Your information will only be shared with partner organizations listed in Appendix A if you give permission to that organization when you use their services for housing or support. - Sometimes, we may share summary statistics or anonymous information with government partners to help plan and fund housing programs. We will never share anything that can identify you.
What happens if you say no?	- You will still be able to receive emergency shelter and basic support. Please note: Some supports or programs may not be available or may take longer to arrange if you do not share your information.
Can you choose what information is shared?	- If you consent to share your information, all questions you answer will be part of your shared file. You have the right to not answer questions. If you do not share some details, there may be programs or housing we cannot offer. Emergency shelter and basic support are always available. - For a list of the minimum information partner organizations may see if you give them permission, see the table in Appendix B.

How will your information be protected?	• Your information is stored in our secure database with strict access controls. Only staff directly supporting you can see your information. • We follow all federal and provincial privacy laws to keep your information safe. If there is ever a privacy issue, we will let you know.
Can you change your mind later?	• Yes. You can withdraw your consent at any time by filling out the Consent Withdrawal Form. • After you withdraw, your information will be hidden in our system. Only your name may remain visible for records. • Partner organizations will keep any information they already received, but they cannot access your information in the system.

Please review and check each:

- ☐ I understand that if I give permission, my information (including health or legal details, if relevant) will be collected and entered into HIFIS and the By-Name List to help with housing and support.
- ☐ I understand that I can withdraw my consent at any time. Withdrawal will not remove information already shared. If I return for services in the future, I will be asked to give new consent.
- ☐ I understand that unless I withdraw my consent, this consent form will be valid for 12 months.
- ☐ I have read this form, or had it explained to me, and I understand it.

Consent Options: Choose One Only

- A** ☐ I agree to have my information collected and entered into HIFIS, accessed by partner organizations when I seek their services, and added to the By-Name List (listed in HIFIS as **Explicit + Coordinated Access**).
- B** ☐ I agree to have my information collected and entered into HIFIS for use only at this agency. I do NOT wish other partner organizations to access my information stored in HIFIS when I seek their services, and I do NOT want to be added to the By-Name List. (listed in HIFIS as **Declined to Share**)
- C** ☐ I do NOT agree to have my information collected and entered into HIFIS.

Name of the Participant

Date of Birth (DD/MMM/YYYY)

Signature of the Participant

Date of Consent (DD/MMM/YYYY)

Staff Name and Organization

IF FORM WAS TRANSLATED VERBALLY

I _____ (name of interpreter) hereby declare that I have accurately interpreted the entire content of this form from English to _____ (name of language) and that I did so to the best of my ability. I confirm that I am proficient in both of these languages and was able to communicate effectively with the service user.

Signature of Interpreter

IF CONSENT IS COLLECTED VERBALLY

I _____ (staff name) from _____ (Partner Organization) attest that the Informed Verbal Consent of the Service Participant was obtained on _____ (DD/MM/YYYY). This consent is valid for up to 30 days to allow for an in-person meeting, at which time written consent will be obtained. The Service Participant understands what personal information is being collected and how it will be used (as outlined above).

Signature of staff member

Notice Regarding Collection of Your Personal Information

Provincially, your information is collected under the authority of Nova Scotia's Freedom of Information and Protection of Privacy Act and used to deliver and evaluate homelessness programs and services. For questions, contact Information Access and Privacy Services Nova Scotia (<https://beta.novascotia.ca/programs-and-services/information-access-and-privacy>).

Federally, your information is also collected under the authority of Canada's Access to Information Act and Privacy Act, for the purpose of delivering and evaluating homelessness programs and services. Federal privacy questions should be directed to the Access to Information and Privacy Coordinator for Housing, Infrastructure and Communities Canada.

If you have an unresolved concern about your privacy, you can contact:

Office of the Information and Privacy Commissioner for Nova Scotia
P.O. Box 181, Halifax, NS B3J 2M4
Phone: 1-866-243-1564 or (902) 424-4684
Email: oipecns@novascotia.ca
Website: <https://oipec.novascotia.ca>

Common Consent Appendix A: Current Partner Organizations

With your consent, your personal information may be shared with staff who work at the following Partner Organizations in the Halifax Regional Municipality Housing and Homelessness Service System during the matching and referral process if their programs can provide you with housing or other support.

- 902 Man Up
- Adsum for Women & Children
- Affirmative Ventures
- Affordable Housing Association of Nova Scotia
- AKOMA
- Association of Black Social Workers
- Atlantic Community Shelters Society
- Beacon House
- Chebucto Connections
- Coverdale Justice Society
- Dalhousie Housing Support
- Elizabeth Fry Society of Mainland Nova Scotia
- Freedom Foundation of Nova Scotia
- Halifax Refugee Clinic
- HRM Homelessness Team
- John Howard Society of Nova Scotia
- Mi'kmaw Native Friendship Centre
- North End Community Health Centre
- Old School Community Gathering Place
- Phoenix Youth Programs
- Salvation Army
- Shelter Nova Scotia
- Souls Harbour Rescue Mission
- Stepping Stone
- Tawaak Housing Association
- VETS Canada
- Welcome Housing and Support Services
- YWCA of Halifax

This list is accurate as of August 2025.

**This list may change as new partner organizations join or leave.
You can request an up-to date copy of this list at any time.**

Common Consent Appendix B: More About Your Housing and Support Services

What is the Halifax Regional Municipality Housing & Homelessness System?

We are a group of local organizations in Halifax Regional Municipality that work together to help single adults, youth and families experiencing homelessness to find and keep safe housing and connect with needed support services. Our network includes shelters, outreach programs, housing providers, and other agencies, all working as a team to support you.

What is the Homeless Individuals and Families Information System (HIFIS)?

HIFIS is a secure computer database used only by our partner organizations to help coordinate your housing and support, while protecting your privacy. In Nova Scotia, HIFIS is managed by the Affordable Housing Association of Nova Scotia (AHANS).

What is the By-Name List (BNL)?

The By-Name List is a confidential list of individuals and families experiencing homelessness and seeking support. Being on the BNL helps our partners work together to prioritize and match people in greatest need with housing and support as quickly as possible.

Partner organizations regularly meet to review the BNL and talk about how to remove barriers, add support, and help people find housing faster. These meetings are sometimes called “case conferencing” or “matching and referral.”

Who ensures my privacy and oversees the system?

HIFIS, our secure computer database, is managed according to strict federal and provincial laws. Privacy officers in each organization are responsible for making sure your information is protected. Ask staff for their contact information if you have questions or concerns.

What rights do I have over my information?

At any time, you can request a list of the personal information that has been collected about you, with whom it has been shared, and what it is used for. For a full list, please contact the BNL Coordinator at cas@ahans.ca.

How long is my information kept?

Records are kept only as long as required by law or funders. Ask staff if you want more details.

Minimum Amount of Information Partner Organizations can see in HIFIS

If you give permission for your information to be shared, the minimum amount of information partner organizations will be able to see includes:

Client ID Number	The unique number HIFIS uses for you
Name	Your first and last name as you gave it
Date of Birth and Age	For verifying eligibility
Gender	The gender you provide
Contact Information	Phone number, email, or address you provide
Alias (optional)	Any other name you are known by and provide
File Number	Internal reference; this may be the same as your ID number
Watch Concern	An alert for staff if you have any safety concerns
Client State	Whether your file is active or inactive

Appendix D: Additional Definitions

Acuity:

An assessment of the level of complexity of a person's experiences and areas of resilience; used to determine the appropriate level, intensity and frequency of supports to sustainably end a person's homelessness. In HRM, acuity is determined by the VI-SPDAT, a triage process.

Ages (Adult/Senior/Youth):

For the purposes of matching and referral, the age brackets are defined in HRM as:

Seniors: 55+

Adult: 19-54

Youth: 16-24

**NOTE: transition aged youth are between 19-24 and can be prioritized for either youth or adult vacancies. In Nova Scotia, and therefore HRM, an individual must be 19 years of age to enter into a tenancy lease agreement.*

Average Market Rent (AMR):

The average monthly rent by unit type as determined in the annual survey of rents for the prior calendar year published by the Canada Mortgage and Housing Corporation (CMHC) for the area/municipality in which the housing is situated. The AMR report can be found here: <https://www.cmhc-schl.gc.ca/professionals/housing-markets-data-and-research/market-reports/rental-market-reports-major-centres>.

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.

Diversion:

Occurs once an individual has lost legal tenure for their housing option but prior to shelter entry. Emphasis is on securing safe, appropriate options in community – even temporarily – rather than shelter stay, whenever possible.

Document Readiness:

*A client's readiness for independent or permanent supportive housing from a documentation perspective. In Nova Scotia, this includes: **<insert document requirements>** Please note, this is sometimes referred to as housing readiness, but this is inaccurate in a Housing First focused context. Housing is not conditional on a client's ability to demonstrate that they are "ready" for housing.*

Families:

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

HIFIS:

Acronym - Homeless Individuals and Families Information System

Housing Support Worker:

A professional who helps individuals or families who are homeless, at risk of homelessness, or transitioning from emergency shelter to permanent housing. Their main role is to support people in securing and maintaining stable, safe housing while addressing underlying challenges that affect housing stability. Housing Support Workers assist people with personalized support plans that include housing searches, application assistance, viewing units, communicating with potential landlords, life skills, etc. They provide check ins and address issues early on, therefore helping to prevent evictions.

Intensive Case Manager:

A specialized support professional who works closely with individuals experiencing chronic or complex homelessness. Often aligning with the Housing First model, they provide highly individualized support to the most vulnerable members of the homeless population, especially those newly housed or who have not succeeded in lower-intensity support programs. With smaller caseloads, they can provide more responsive care for more frequent, longer, and more personal interactions. Intensive Case Managers often use assessment tools and act as the “hub” within a network of supports.

Inflow:

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

Mediation:

Intervention aimed at resolving a dispute; commonly between landlord/property manager and tenants.

Memorandum of Understanding (MOU):

A document describing the broad outlines of an agreement reached between two or more parties. In this context, an example would be an agreement signed between a landlord and a service provider to ensure that clients are appropriately supported through the entire process of moving from homelessness into permanent housing, typically required when the housing vacancy offered does not have access to on-site supports.

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).*

Prevention:

Prevention activities occur before an individual has lost their ability to reside at an address. The two types of prevention activities are:

- **Eviction Prevention:** *any strategy or program designed to keep individuals and/or families who have legal tenure in their home and that helps them avoid entering into homelessness; most eviction prevention work occurs within the sixty (60) days prior to when the household is expected to leave the unit and usually involves referrals to community legal services.*
- **Housing Loss Prevention:** *a form of prevention when the household is not the legal leaseholder but is still located in a safe and appropriate housing situation and may have formal ties to the housing.*

Rapid Resolution:

Activities that occur within the first few weeks of a shelter stay/unsheltered homelessness when an individual cannot be diverted before entry into literal homelessness. This may be seen as an extension of diversion and focuses on housing solutions, sometimes outside the coordinated access system (ie, market rentals). Rapid resolution may also be referred to as rapid rehousing.

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.

Rent Geared to Income (RGI):

A type of housing assistance that allows individuals to pay 30% of their income for rent, regardless of the Average Market Rent (AMR) of the unit.

Rent Supplement/Subsidy:

Government funded payments that bridge the gap between what an individual or family can afford to pay and what the actual cost of housing is.

Note: *supplement and subsidy are used interchangeably in Nova Scotia.*

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.

Support Agreement:

An agreement between a service provider and a client that outlines the parameters of the services provided and the expectations of the client and the support worker. Support agreements can be terminated by either party at any time if there are violations of the agreement. It is expected that both parties will at all times be engaged in the process until the predetermined end date of the support agreement.

Supported vs Supportive Housing:

- **Supported Housing:** *permanent housing that offers support (for substance use or mental health, for example), life skills and, in some cases, education and training. Typically, scattered site units, but not always.*
- **Supportive Housing:** *permanent housing that offers structure, supervision, and on-site support (for substance use or mental health, for example), life skills and, in some cases, education and training. Typically congregate living, but not always.*

Supported and supportive housing is an adaptive continuum of care that is client focused so the frequency/intensity of support can vary based on client needs. Intensive case management can still occur in scattered site units. The terms supportive and supported are often used interchangeably in Nova Scotia.

Transitional Housing:

A supportive – yet temporary – accommodation meant to bridge the gap from homelessness to permanent housing by offering structure, supervision, support (for substance use or mental health, for example), life skills and, in some cases, education and training.

Triage:

The pre-screening of clients in order to determine the urgency of their need for services and the nature of services required. This may lead to more fulsome assessment.

Trusteeship:

A legal term referring to holding assets for the benefit of another individual or group; voluntary trustee programs help individuals manage their finances to ensure there is enough for rent, power and (sometimes) other essentials. Trusteeship is often partnered with other wraparound services related to the needs of the individual.

VI-SPDAT:

Acronym – Vulnerability Index Service Prioritization Assistance Tool

For more detailed definitions please refer to:

[Canadian Definition of Homelessness](#)

Appendix E: CAS-G Terms of Reference

Coordinated Access System Governance Table (CAS-G) Terms of Reference

Purpose:

The purpose of the Coordinated Access System Governance Table is to maintain the ongoing management of the coordinated access system. The Governance Table will ensure that a systematic approach will be followed that is flexible enough to meet the needs of all service providers participating in coordinated access while aligning with data reporting expectations for the funders.

Responsibilities:

- Ensure the community prioritization matrix is consistently used, and that it is re-evaluated every eighteen (18) months to validate efficiency and equity.
- Establish and review monitoring processes to ensure CAS policies and procedures are followed by all service providers and the CAS Lead Agency.
- Recommend and approve changes to the Policy Manual as required for the proper functioning of CAS, with a full review of the Policy Manual to be initiated every two (2) years.
- Support the recruitment of new members to the Governance Table, including the determination of recruitment frequency, and how to recruit a more diverse table.
- Support data sharing and Coordinated Access in HRM.
- Support the Matching and Referral Monthly meetings as needed.

Decision Making Process:

Governance Table decisions are made using consensus and input from all committee members, based upon open and respectful discussion at the table. In a situation where a consensus cannot be reached, decisions will be taken to a vote with 75% of members in agreeance. In the instance that committee members are absent during an approval, the policy/procedure being approved will be sent via email to all committee members for response prior to the next meeting. If a member consents via email or does not actively dissent (no response), this will carry the vote. If there is opposition that exceeds 25% of the table, the policy/procedure will be re-addressed at the following meeting.

Any actions or decisions that require CAB approval will be added to the CAB agenda and follow their decision-making process. Please refer to the CAB terms of reference for the decision-making process.

Code of Conduct:

The members of the Governance Table will endeavour to promote an environment of cooperative and respectful interaction, whereby all members are treated with courtesy, respect and dignity. Members are also expected to work in an effective and professional manner, maintain confidentiality and adhere to a high standard of diligence and care in accomplishing their work.

Decisions made by the Table should be inclusive, representing the collective interest of community members. Time sensitive decisions will be responsive and prioritized based on emergent data relevant to the community.

Meeting Logistics:

The Governance Table will meet for one hour, biweekly at first, until initial goals are met (development of terms of reference, prioritization matrix, and other CAS procedures) and then will be monthly. After six months, the members will re-evaluate if the frequency needs to increase or decrease.

Communication:

Communication outside of regular meetings will take place via email or telephone/video calls unless the situation warrants an in-person meeting.

Members:

All members are expected to make a commitment to participate, which includes attending (majority of) meetings, coming prepared to discuss emergent and ongoing issues and participating in decision making. If a member misses two consecutive meetings without reasonable notice and/or explanation, they will be given notice via email that this is outside the attendance expectations of the committee. One additional meeting missed without reasonable notice and/or explanation and the committee member will be asked to resign their position with the committee.

Members are expected to make a one-year commitment to the Governance Table; however, this may be extended in certain circumstances.

Current members will support the recruitment of new members in the last quarter of their term on the committee. Membership recruitment should be inclusive and diverse with an emphasis on targeting new membership for demographics previously not adequately represented. A community call for new members will take place three (3) months prior to the end of the current membership tenure. Current members are welcome to re-express interest in their seat on the committee for up to two (2) additional terms.

At a minimum, it is recommended that Governance Committee Membership include members from the following community representation: Indigenous partners, People of African Descent partners, lived experience, service providers assisting women, service providers assisting men, service providers assisting families, service providers assisting persons exiting institutions (including corrections, physical/mental health facilities, addictions recovery facilities).

Members are expected to act as the representative of their organization and report back to their team on the progress of the Governance Table, ensuring that all organizations are up to date on

the work being achieved. Each organization may have one (1) representative on the committee to ensure that all organizations have the option to participate. Exception: if a member is job sharing, both representatives are able to participate in the committee.

Members of the Governance Table are expected to act respectfully to one another at all times and are expected to be committed to seeking solutions when issues do arise. If a member's ethical conduct is called into question at anytime, and proven, they will be asked to resign from the Table. Any forms of oppression (including but not limited to: racism, sexism, transphobia, homophobia, ableism, etc.) will not be tolerated under any circumstance. Members who engage in any form of oppression will be asked to withdraw from the Table.

Guests:

Guests may be invited to attend Governance Table meetings or discussions based on the work being completed. These invites will be discussed by the members (either during meeting times or via email) prior to being extended.

Approved by CAS/HIFIS Governance: 25-Jul-2024

Appendix F: HIFIS-G Terms of Reference

HIFIS Governance Table (HIFIS-G) Terms of Reference

Purpose:

The purpose of the HIFIS Governance Table is to maintain the standards and usage of the HIFIS database. The Governance Table will ensure that a systematic approach will be followed that is flexible enough to meet the needs of all service providers participating in coordinated access while aligning with data reporting expectations for the funders.

Responsibilities:

- Establish monitoring processes to ensure HIFIS policies and procedures are followed by all service providers and the HIFIS Database Managing Agency.
- Recommend and approve HIFIS-related changes to Coordinated Access Policy Manual(s) as required for the proper functioning of CAS, in applicable communities.
- Recommend and approve changes to the HIFIS Policies and Procedures Guide as needed. The guide will be fully reviewed every two (2) years to ensure it meets the changing needs of communities and funders.
- Encourage the real time usage of HIFIS and determine the barriers that are preventing front line staff from utilizing this required database.
- Support data sharing and Coordinated Access in applicable communities.
- Support the recruitment of new members to the Governance Table, including the determination of recruitment frequency, and how to recruit a more diverse table.

Decision Making Process:

Governance Table decisions are made using consensus and input from all committee members, based upon open and respectful discussion at the table. In a situation where a consensus cannot be reached, decisions will be taken to a vote with 75% of members in agreeance. In the instance that committee members are absent during an approval, the policy/procedure being approved will be sent via email to all committee members for response prior to the next meeting. If a member consents via email or does not actively dissent (no response), this will carry the vote. If there is opposition that exceeds 25% of the table, the policy/procedure will be re-addressed at the following meeting.

Any actions or decisions that require HRM Community Advisory Board (CAB) and/or Rural and Remote Advisory Board (RRAB) approval will be added to the CAB and/or RRAB agenda(s) and follow their decision-making process. Please refer to the CAB and RRAB terms of reference for the decision-making process.

Code of Conduct:

The members of the Governance Table will endeavour to promote an environment of cooperative and respectful interaction, whereby all members are treated with courtesy, respect and dignity. Members are also expected to work in an effective and professional manner, maintain confidentiality and adhere to a high standard of diligence and care in accomplishing their work.

Decisions made by the Table should be inclusive, representing the collective interest of community members. Time sensitive decisions will be responsive and prioritized based on emergent data relevant to the community.

Meeting Logistics:

The Governance Table will meet for one hour, biweekly at first, until initial goals are met (development of terms of reference, prioritization matrix, and other HIFIS procedures) and then will be monthly. After six months, the members will re-evaluate if the frequency needs to increase or decrease.

Communication:

Communication outside of regular meetings will take place via email or telephone/video calls unless the situation warrants an in-person meeting.

Members:

All members are expected to make a commitment to participate, which includes attending (majority of) meetings, coming prepared to discuss emergent and ongoing issues and participating in decision making. If a member misses two consecutive meetings without reasonable notice and/or explanation, they will be given notice via email that this is outside the attendance expectations of the Table. One additional meeting missed without reasonable notice and/or explanation and the member will be asked to resign their position on the Table.

Members are expected to make a one-year commitment to the Governance Table; however, this may be extended in certain circumstances.

Current members will support the recruitment of new members in the last quarter of their term on the Table. Membership recruitment should be inclusive and diverse with an emphasis on targeting new membership for demographics previously not adequately represented. A community call for new members will take place three (3) months prior to the end of the current membership tenure. Current members are welcome to re-express interest in their seat on the Table for up to two (2) additional terms.

At a minimum, it is recommended that Governance ~~Committee~~ Membership include members from the following community representation: Indigenous partners, People of African Descent partners, persons with lived experience, and service providers assisting women, men, families and persons exiting institutions (including corrections, physical/mental health facilities, addictions recovery facilities, etc.).

Recognizing that communities are different sizes and therefore some communities may have larger representation, the Table will strive to ensure community level equity in our processes.

Community level representation will be proportional to the size of the community, but no one community may exceed 50% of the current membership. In the instance that new membership recruitment leads to interest that exceeds that amount, preference will be given to potential members who represent marginalized demographic groups and/or demographic groups not currently represented in the membership.

Members are expected to act as the representative of their organization and report back to their team on the progress of the Governance Table, ensuring that all organizations are up to date on the work being achieved. Each organization may have one (1) representative on the Table to ensure that all organizations have the option to participate. Exception: if a member is job sharing, both representatives are able to participate, though they will only hold one vote.

Members of the Governance Table are expected to act respectfully to one another at all times and are expected to be committed to seeking solutions when issues do arise. If a member's ethical conduct is called into question at anytime, and proven, they will be asked to resign from the Table. Any forms of oppression (including but not limited to: racism, sexism, transphobia, homophobia, ableism, etc.) will not be tolerated under any circumstance. Members who engage in any form of oppression will be asked to withdraw from the Table.

Guests:

Guests may be invited to attend Governance Table meetings or discussions based on the work being completed. These invites will be discussed by the members (either during meeting times or via email) prior to being extended.

Approved by HIFIS Governance: 22-May-2025

Appendix G: HIFIS User Rights Descriptions

Day Program Worker: This template is designed for frontline staff members who facilitate day programs at shelters, drop ins and supportive housing sites. To gain this level of access, staff

will need to complete the Day Program online HIFIS training modules.

Executive Director: This template is designed for executive directors who will not require access other than the ability to run reports. There will be no access to client information, so for executive directors who take a more hands on role in data entry, a supervisor level template should be selected instead. To gain this level of access, executive directors will need to complete Getting Started with HIFIS online training.

Housing Support Worker: This template is designed for housing support workers and intensive case managers who require access to update client's case management and housing placement/history as well as other various client-based activities. To gain this level of access, staff will need to complete the Housing Based Case Management online HIFIS training modules.

Housing Support Supervisor: This template is designed for supervisors overseeing housing support worker and intensive case management programs and has the same access as the housing support worker template outlined above, with additional supervisory rights, including reporting access. To gain this level of access, staff will need to complete the Housing Support Supervisor online HIFIS training modules.

Outreach ICM: This template is designed for outreach workers who are conducting ongoing case management with their clients. To gain this level of access, staff will need to complete the Outreach ICM online HIFIS training modules.

Outreach Supervisor: This template is designed for supervisors overseeing outreach programs and has the same access as the Outreach ICM template outlined above, with additional supervisory rights, including reporting access. To gain this level of access, staff will need to complete the Outreach Supervisor online HIFIS training modules.

Shelter Worker: This template is designed for frontline shelter staff who will be responsible for booking clients in and out of shelter spaces and other basic shelter activities, without ongoing case management. To gain this level of access, staff will need to complete the Shelter Worker online HIFIS training modules.

Shelter Based Case Manager: This template is designed for shelter staff who are not only responsible for booking clients and out of shelter spaces and other basic shelter activities but also ongoing client case management. To gain this level of access, staff will need to complete the Shelter Based Case Manager online HIFIS training modules.

Shelter Supervisor: This template is designed for supervisors overseeing emergency shelter operations and has the same access as the shelter-based case manager template outlined above, with additional supervisory rights, including reporting access. To gain this level of access, staff will need to complete Shelter Supervisor online HIFIS training modules.

Supportive Housing Worker: This template is designed for frontline staff at supportive housing sites that provide ongoing client case management in addition to other client-based activities. To gain this level of access, staff will need to complete Supportive Housing Worker online HIFIS training modules.

Supportive Housing Supervisor: This template is designed for supervisors overseeing supportive housing sites and has the same access as the supportive housing worker outlined

above, with additional supervisory rights, including reporting access. To gain this level of access, staff will need to complete Supportive Housing Supervisor online HIFIS training modules.

Appendix H: HRM Prioritization Matrix

Population	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Priority 7
Families	CH*	Indigenous &/or African Nova Scotian Descent	Unsheltered Homelessness	Fleeing Violence	Tri-Morbidities	Children in Care	Co-Morbidities
Youth	CH*	Indigenous &/or African Nova Scotian Descent	Youth Aged 16-18	Tri-Morbidities	Fleeing Violence	Unsheltered Homelessness	Aged Out of Child Welfare into Homelessness
Single Adults	CH*	Indigenous &/or African Nova Scotian Descent	Tri-Morbidities	Fleeing Violence	Unsheltered Homelessness	Children in Care	Co-Morbidities

*CH = Chronic Homelessness

People who are chronically homeless have experienced homelessness for a total of at least 6 months (180 days) over the past year OR they have recurrent experiences of homelessness over the past 3 years, with a cumulative duration of at least 18 months (546 days).

Approved August 2025

Appendix I: HRM CAS Secure Document Upload Process

To ensure privacy and confidentiality, all completed By Name List (BNL) Referral documents that have not been directly entered into HIFIS (Homeless Individuals and Families Information System) must be submitted to the Halifax Regional Municipality Coordinated Access System (HRM CAS) by one of two secure methods:

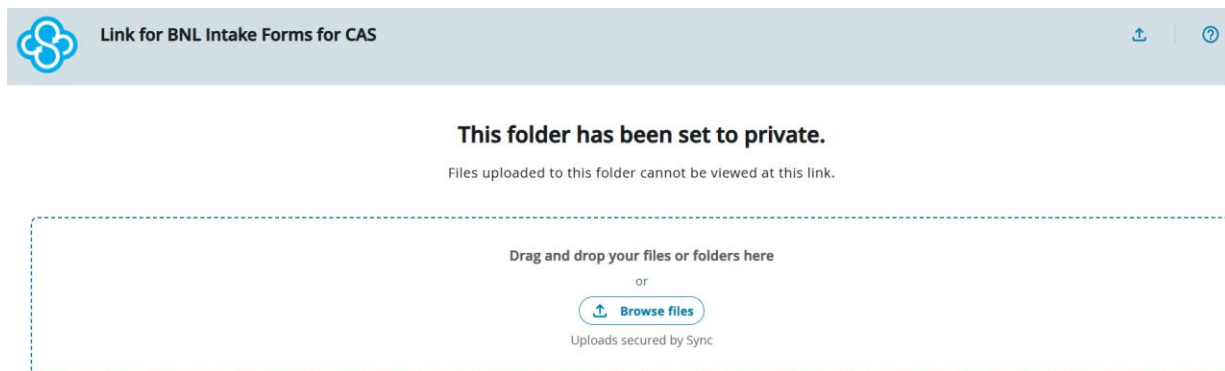
1. Delivery of the original documents to the AHANS office:
Suite 403- 3480 Joseph Howe Drive Halifax NS B3L 4H7
2. Upload the document via the secure Sync Link process outlined in this guide

This manual process is only for agencies who are not currently using HIFIS and/or are not part of HRM community data sharing. If your agency uses HIFIS and/or participates in community data sharing, all BNL referrals must be entered into HIFIS. For further information, please refer to the HRM CAS Policy Manual – Policy A004 – Coordinated Access Referral Process.

Upon completion of the BNL Referral and VI-SPDAT, please follow the below steps:

1. Scan all pages as a single document and rename the document in a way that is easily identifiable. Example: BNL-ClientInitials-AgencyName-Sept2025
2. Upload the document to [this secure Sync Link](#).

When you click the link, it will take you to a page that looks like this:



To upload, you have multiple options.

The simplest method is to drag and drop your file(s) to the section indicated, it will automatically show you the file transfer pop up in the bottom right corner of the page.

This folder has been set to private.

Files uploaded to this folder cannot be viewed at this link.

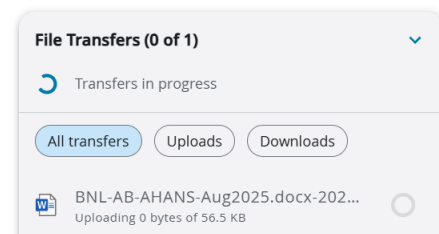
Drag and drop your files or folders here

or

⬆

Browse files

Uploads secured by Sync



Once the transfer is finished, the pop-up window will update to show that it is complete:

This folder has been set to private.

Files uploaded to this folder cannot be viewed at this link.

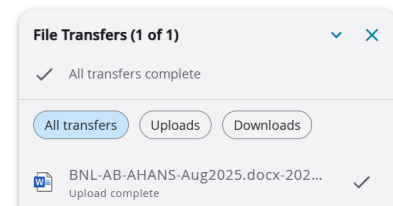
Drag and drop your files or folders here

or

⬆

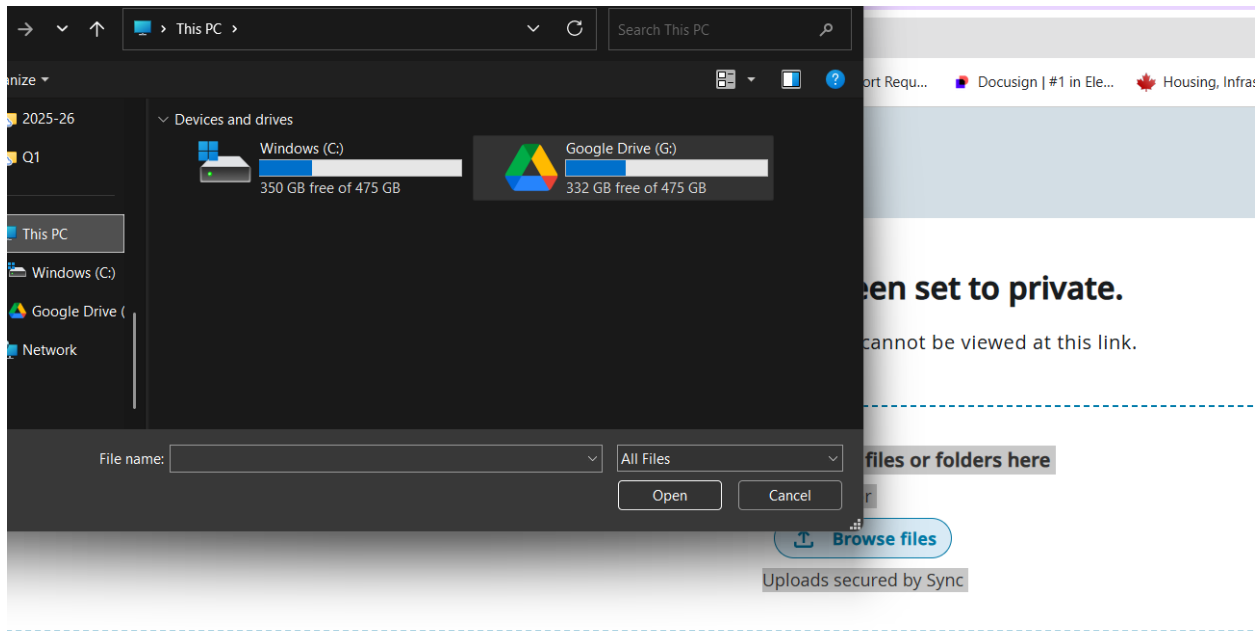
Browse files

Uploads secured by Sync



If you choose the option of uploading, either via the browse files option or the upload icon, it will open the files on your computer to allow you to choose the file that you need

to upload. This will look different for every user and will be dependent upon your agency's computer system.



Once you locate the file, click on it and select open. This will provide you with the same transfer pop up as noted above and will show the progress of the upload until complete.

As this is set up as a private folder, you will not be able to see the document in the folder upon completion of the transfer. As long as the pop-up window shows a successful transfer of the file, you can close your browser at any time. The BNL Coordinator will receive an automated notification that your document has been uploaded.