Coordinated Assessment

Training Requirements & Expectations

To ensure our clients are receiving the most adequate service through the Coordinated Assessment, individuals wishing to complete this process with clients are required to attend and complete the trainings listed below. Individuals will be required to sign in and out of all trainings. A training log (attached) will document and verify participation for each new employee.

Orientation

Assessor Orientation is an in-person training (*to be held virtually until further notice due to the pandemic) lead by ECHO Coordinated Entry (CE) team. An understanding of what coordinated assessment is and looks like in practice for Travis County is communicated. In this training, new employees/assessors will get a grasp on their role and importance in this system change.

Homeless Definitions Training

Individuals will master the HUD definitions and categories of homelessness.

Release of Information Training

Because informed client consent is paramount, individuals will receive in-depth training on our CoC's Release of information. They will also learn multiple ways to complete and upload the ROI in HMIS .

API (Austin Prioritization Index) Training

Individuals will learn how the API came about and its purpose in furthering equity in our community's Homeless Response System. Individuals will also learn what questions are asked in the tool and how the scoring system works.

Individuals will also be taught effective client communication and workflow in our community's HMIS.

Individuals will learn how to score the API and practice with one another through role play to ensure accuracy and data quality.

Overview of Coordinated Assessment Notebook

This in-person training will wrap up formal training by reviewing scripts, definitions, Service Point screen shots, and community resources. This will be a valuable tool that employees will be able to reference throughout the remainder of training.

Service Point Training

In addition to new user and Navigation trainings/ workflows, new assessors will use what they've learned to role play assessment scenarios. Discussion and questions will follow the exercise.

Diversion

New assessors will be trained on how to identify and verify an appropriate diversion.

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Creating a Housing Plan

All assessors will be skilled in completing a housing plan with individuals regardless of the API score and whether they chose Permanent Supportive Housing (PSH) and/or Rapid Re-housing (RRH) referrals.

Creating an Income Plan

Assessors will start the conversation of stable income with completing an income plan with all clients.

Estimated Time of Completion: 8 Hours of in-classroom training

Shadowing Expectations

New assessors will observe a CA Assessor (or ECHO CA Access and/or Community Diversion Coordinator) complete coordinated assessment in full with clients and have the opportunity after each assessment to ask questions and gain clarity on decisions made by experienced staff. Once they feel comfortable with the process, assessors will request an "ECHO Coordinated Assessment Program" EDA (Enter Data As) in HMIS to sharonkao@austinecho.org, and complete assessments in full with clients under the direct supervision of CA Assessor (or ECHO CA Access and/or Community Diversion Coordinator) who will sit in to ensure correct data entry and client communication. They will be available to answer questions, troubleshoot HMIS issues in the moment, and provide verbal feedback to new assessors on their progress. New assessors will complete shadowing until they can comfortably assess an individual alone.

Shadowing Timeline

Before attending the initial eight-hour in-person training, new assessors will be expected to create a workflow within their agency. All assessors will complete their shadowing within **four weeks** of the initial training.

1. Within the **first week**, contact a CA Assessor (or ECHO CA Manager and/or Crisis Outreach Manager) to start the shadowing process
2. By the **third- and fourth- weeks** trainees will start being shadowed by a CA Assessor (or ECHO CA Manager and/or Crisis Outreach Manager
3. By the **fourth week** trainees will finish shadowing with either Alesandra. This shadowing will be completed at your agency, where we will also finalize and document any changes to the initially proposed internal assessment workflow.
4. After your training/shadowing is completed, assessors will be expected to complete a minimum of **five** assessments per month to ensure skills are being maintained and you are meeting a community need.
5. Assessors will be **required** to attend quarterly Coordinated Entry All Agency meetings held at ECHO. These meetings consist of any new training material, data quality, and new steps to the process.

Estimated Time of Completion: 4 weeks

Data Quality

ECHO is responsible for checking assessment data quality, and any necessary corrections will be sent to assessors until they show they are comfortable and meeting all data requirements.

a. This will initially occur on a weekly basis for at least the first month.

b. Data will then be checked monthly, and any major corrections will be sent to assessors if necessary.
c. If data quality decreases after this, additional training/shadowing may be required to ensure assessments are being implemented effectively in the community.

Estimated Time of Completion: On-going and as needed

Additional Trainings

In addition to Coordinated Entry training requirements, individuals will complete the following community trainings as they become available:

- Housing First Training
- Crisis Intervention Training

*Other trainings as necessary

Estimated Time of Completion: Determined by training availability

Expectations

Individuals will meet all agency requirements of staff- trainings, meetings, etc. - and report to their direct supervisors on agency matters.

Individuals are required to attend a monthly ECHO Coordinated Assessment meeting and report to ECHO on matters regarding coordinated assessment process.

Estimated Time of Completion: Ongoing

ECHO Coordinated Entry Team Contact Info

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For Outreach questions contact:

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