



## ASSESSOR ONLY PILOT POLICY

### POLICY & PROCEDURE

Applies To: Washington County Department of Housing Services

Division/Unit: Homeless Services

Approved Date: June 5, 2024

### Purpose

The purpose of this document is to outline the policies and procedures related to agencies who contact Washington County Department of Housing Services ("County") to request Homeless Management Information System (HMIS) access for the purpose of staff members becoming Phase 1 Assessors only. These agencies are considered "assessor only agencies."

### Policy

The duration of this pilot policy is one year from the approval date of June 5, 2024. Any licenses granted under the pilot policy will expire on that date. The County extension of the pilot does not guarantee an organization continued access. This policy will be assessed by the County 3 (three) months ahead of the expiration of this pilot policy.

The County has limited total user licenses available for HMIS.

Agencies who are required to utilize HMIS under the terms of their contract with the receive priority status for allocation of HMIS user licenses.

Assessor only agencies may be allocated user licenses paid for by the County. The County will allocate no more than 2 (two) licenses per assessor only agency. Additionally, the County may allocate up to 5% of total HMIS licenses available for assessor only organizations. If an agency requests more than 2 (two) Phase I Assessor licenses, additional licenses may be allocated if those licenses will be paid for by the assessor only agency and the number issued does not cause the total percentage of licenses issued to assessor only agencies to rise about 5%.

Assessor only agencies must demonstrate that they:

- Are a governmental organization, qualify for 501(c) (3) status, are funded by the McKinney-Vento Homelessness Assistance Act, or are a health care organization.
- Have offices within the Washington County boundaries.
- Predominantly serve participants who are experiencing unsheltered homelessness or staff members identified to complete Phase 1 Assessments predominantly serve individuals experiencing unsheltered homelessness.
- Are typically in consistent contact with the participants they serve.
- The staff person who will be a Phase 1 Assessor is able to complete 4-6 hours of training per year related to the Phase 1 Assessment and Data Privacy and Security.

The County reserves the right to deny the request for licenses if any of the following conditions are met:

- There are no licenses available.

- The requestor is not part of a governmental organization, does not qualify for 501(c) (3) status, are not funded by the McKinney-Vento Homelessness Assistance Act, or are not a health care organization.
- The requestor is a member of law enforcement.
- The requestor has previously lost access to HMIS due to inappropriate use of the system.
- Any other condition as determined by Washington County.

The County reserves the right to reclaim licenses if any of the following conditions are met:

- A user has not accessed HMIS is more than 90 days.
- A user has violated the terms of the Agency Participant Agreement or the End User License Agreement.
- An assessor only agency has violated the Agency Participant Agreement.
- An assessor only agency is no longer serving eligible clients within Washington County.
- An assessor only agency's status or type of work changes substantially from the date they signed the Agency Participation Agreement.
- An assessor only agency's contract with Washington County is terminated.
- The pilot policy expires.
- Any other condition as determined by Washington County.

Washington County may revoke all licenses after the pilot phase of this policy is completed.

### Procedure

1. Complete Request to become Phase 1 Assessor  
<https://app.smartsheet.com/b/form/d9dbe3c52a6b4ed982f5fb5ee58acd78>
2. Agency is contacted by the County to review request.
3. Receive notification of acceptance or denial
  - a. If denial, a new request may be submitted in no less than 6 months from the date of denial.
4. If approved complete the Agency Participation agreement
5. Submit Agency Participation Agreement to the County.
6. Receive confirmation the Agency Participation Agreement has been accepted by the County.
7. Complete New Staff Onboarding form.
8. Ensure new staff attend trainings required to grant them HMIS access.

### Evaluation of pilot:

After 6 months of an assessor only agency engaging with the pilot policy, the County will review the data entered by the assessor only agencies over the preceding months along with data collected on their collaborative participation within the access, shelter, and housing systems. After reviewing the data, the County will a determination around ongoing HMIS access for assessor only agencies.