**Your CAS Assessor Training
will begin shortly.**
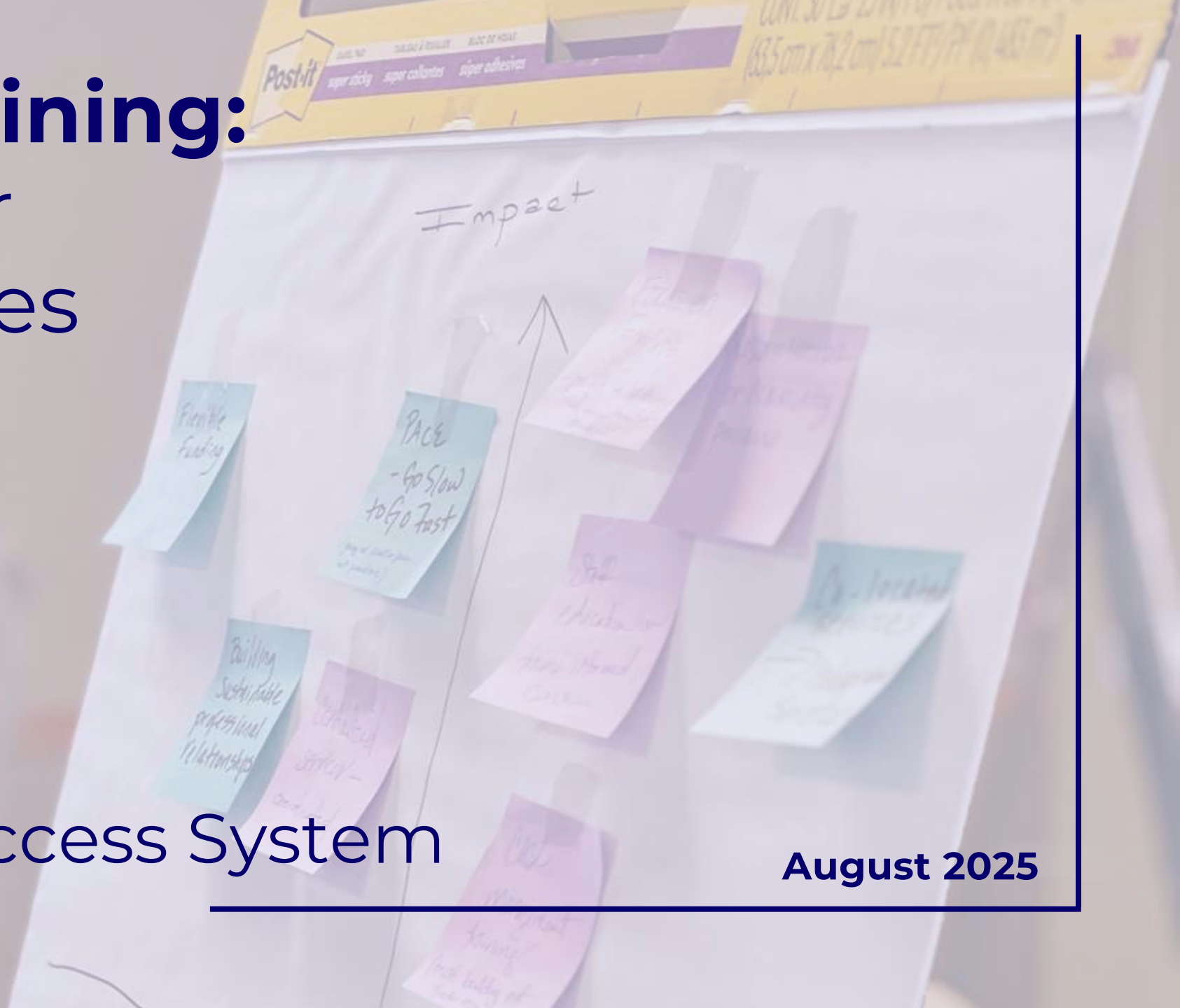
**Please add your name and agency
to the chat.**

Provider Training:
CAS Assessor
Training Series

CAS 101
Coordinated Access System

August 2025

CAS 101 Agenda

Understand the role of CAS in the Sacramento CoC Homeless Response System.

Learn the CAS Assessor responsibilities.

Navigate: CAS processes tools and resources for support.

Understanding the Coordinated Access System (CAS)

Coordinate Access System

*A network designed to match people experiencing homelessness with **shelter, housing, and service options**. CAS helps connect people with the highest needs to housing and support services as quickly as possible*

ACCESS
211
24-hour call line
Access Points

Triage

Crisis Response
(shelter, outreach, DV)

Resource Connection

ASSESSMENT PROCESS

Housing Problem Solving

Shelter Assessment /
Housing Assessment(s)

PRIORITIZATION

Vulnerability Factors and Housing Barriers

REFERRAL to HOUSED

Extremely Vulnerable Household

LIST MANAGEMENT

Community Queue:
A list of people, by name, who are actively experiencing literal homelessness or fleeing domestic violence

Priority Group:
People on the community queue who have the highest vulnerability and are prioritized for supportive housing resources

How does CAS work?

Triage & Crisis Assessment

- Initial assessment of service need and connection to crisis resources.

- Note about Shelter: Currently able to support ~25% of the shelter demand.

- Extremely Vulnerable Households (EVH) will be immediately prioritized.

Housing Problem Solving Housing Assessment

- Conversational case management approach to exploring client supports and barriers to housing.

- Support with rapid exit / prevention from homelessness through one-time financial assistance.

- Complete housing assessments and develop housing goals to identify pathways out of homelessness.

How to Access CAS Resources

Access Points	CAS Assessors
• **Call 2-1-1 and press <u>8</u>** to connect with available CAS Specialist, 24/7/365. • In development: 　• Physical access points 　• Virtual App for Youth	• Staff trained by SSF to administer CAS Assessments. • ~600 active CAS Assessors • Must attend training and pass annual certification requirements. • Supports clients through agency activities (outreach, shelter, drop-in, etc.).

CAS Assessor Responsibilities

CAS Assessor Responsibilities

- Read each question as written without omitting or adding questions.

- Assessments must be conducted in a confidential setting.

- Answers must not be intentionally changed to alter the client's score.

- A client's answers should not change after the assessment has been completed. If a client's situation changes significantly, a new assessment should be conducted to ensure their responses accurately reflect their current circumstances.

- If a client has difficulty understanding the questions, offer reasonable accommodation(s) to ensure they can fully participate and provide accurate responses.

CAS Assessor Responsibilities

- Assessment scores should not be shared with the client. Rather, you should explain the purpose of the assessment and how it informs the housing plan (ISP).

- Do not guarantee specific housing timeframes or make definitive promises regarding housing availability.

- If you suspect an issue with the assessment record (score appears too low based on responses, etc.) report the discrepancy to CAS/HMIS staff for further review.

CAS Assessor Code of Ethics

- ✓ Build your trauma-informed care and motivational interviewing skills.

- ✓ Commitment to professional development.

- ✓ Help clients understand the purpose, use, and potential outcomes of the assessment.

- ✓ Treat all clients equally, respectfully, and fairly.

- ✓ Disclose any potential conflicts of interest.

- ✓ Do not discriminate based on race, color, religion, national origin, ancestry, disability, age, gender, or sexual orientation.

CAS Assessor Code of Ethics

✓ Practice cultural humility.

✓ Report any observed unethical behavior or policy violations.

✓ Uphold the highest standards of professional conduct in your CAS Assessor role.

✓ Do not condition the administration of CAS assessments in ways that do not align with CAS policies and procedures.

✓ Uphold and protect client rights related to privacy and confidentiality.

✓ **You are responsible for developing an individualized housing-focused support plan (ISP) after completing a housing assessment with any client.**

CAS Assessor Code of Ethics

✓ Adhere to emergency procedures for client safety and crisis intervention.

✓ **If a client is identified as an *extremely vulnerable household* (EVH), escalate their case appropriately to ensure immediate support in navigating crisis and housing resources.**

✓ Do not use the HMIS system to defraud or attempt to defraud federal, state, or local governments, individual entities, or to engage in any illegal activities.

✓ **Your HMIS activities will be subject to regular monitoring and that I may be required to undergo site-based monitoring.**

✓ Be open to feedback.

✓ Support clients in submitting grievances.

Pop quiz
Drop it in the chat!

1. It is okay to skip the Individualized housing focused support plan(ISP) when you are completing an assessment.

2. You are responsible for asking the questions exactly as they are written on all the assessments.

CAS
RESOURCES

CAS Resources

Emergency Shelter

- ❑ 15 emergency shelters = ~1,000 shelter "units"
- ❑ Family, Individual and Youth shelters

Case Management (limited)

- ❑ Short-term or "bridge" case management
- ❑ Sustained/long-term case management *(in development)*

Housing Problem Solving

- ❑ Financial assistance to support in acquiring "market-rate" housing
- ❑ Eviction Avoidance

Housing Supports

- ❑ Housing navigation (requires rental subsidy and/or client income)
- ❑ Rental subsidies (limited) + case management
  - ▪ Rapid Re-Housing
  - ▪ Permanent Supportive Housing
  - ▪ Other Permanent Housing

2-1-1 Flyer

2-1-1 flyers are now available in 6 different languages. In addition to English, they are now available in the following languages:

1. Arabic
2. Cantonese
3. Hmong
4. Russian
5. Spanish
6. Vietnamese

For copies of flyers: 2-1-1 - Sacramento Steps Forward

Resource	Eligibility	Prioritization
Shelter	• Experiencing homelessness tonight, including outside, in a motel/hotel paid for by an organization, respite center, or with friends or family tonight (TAY only) • Shelter-specific criteria (i.e. no 290s, has children, etc.)	• Extremely Vulnerable Households • Geographic preference (individual adult programs only)
Shelter navigation support Coordinated Access Navigation (CAN Team)	• Waitlisted for shelter • Not currently working with a case worker/manager	• Extremely Vulnerable Households • Families w/ children
Problem-solving services	• At-risk of or currently experiencing homelessness,* fleeing or attempting to flee a violent situation* • If seeking financial assistance, the support must resolve the housing crisis	• Clients with eviction notices
CoC housing (rental subsidies)	• Dependent on program: at-risk of or currently experiencing homelessness,* fleeing or attempting to flee a violent situation*	• Extremely Vulnerable Households • High Housing Barriers • Long length of time homeless
Housing Navigation	• At-risk of or currently experiencing homelessness,* fleeing or attempting to flee a violent situation* • LEAP eligibility (voucher or rental subsidy)	• Clients with case management and rental subsidy

Accessing Resources Through CAS

Access Points & Outreach

Assess and support clients to access resources and housing

2-1-1, #8
Triage and refer eligible households to crisis resources

People Experiencing Homelessness

CAN Team
Provides 1:1 support for households on the shelter waitlist

Sacramento Steps Forward
Hosts case conferencing and refers into CoC housing programs

Shelters
Complete intakes and plan for housing stability or permanency
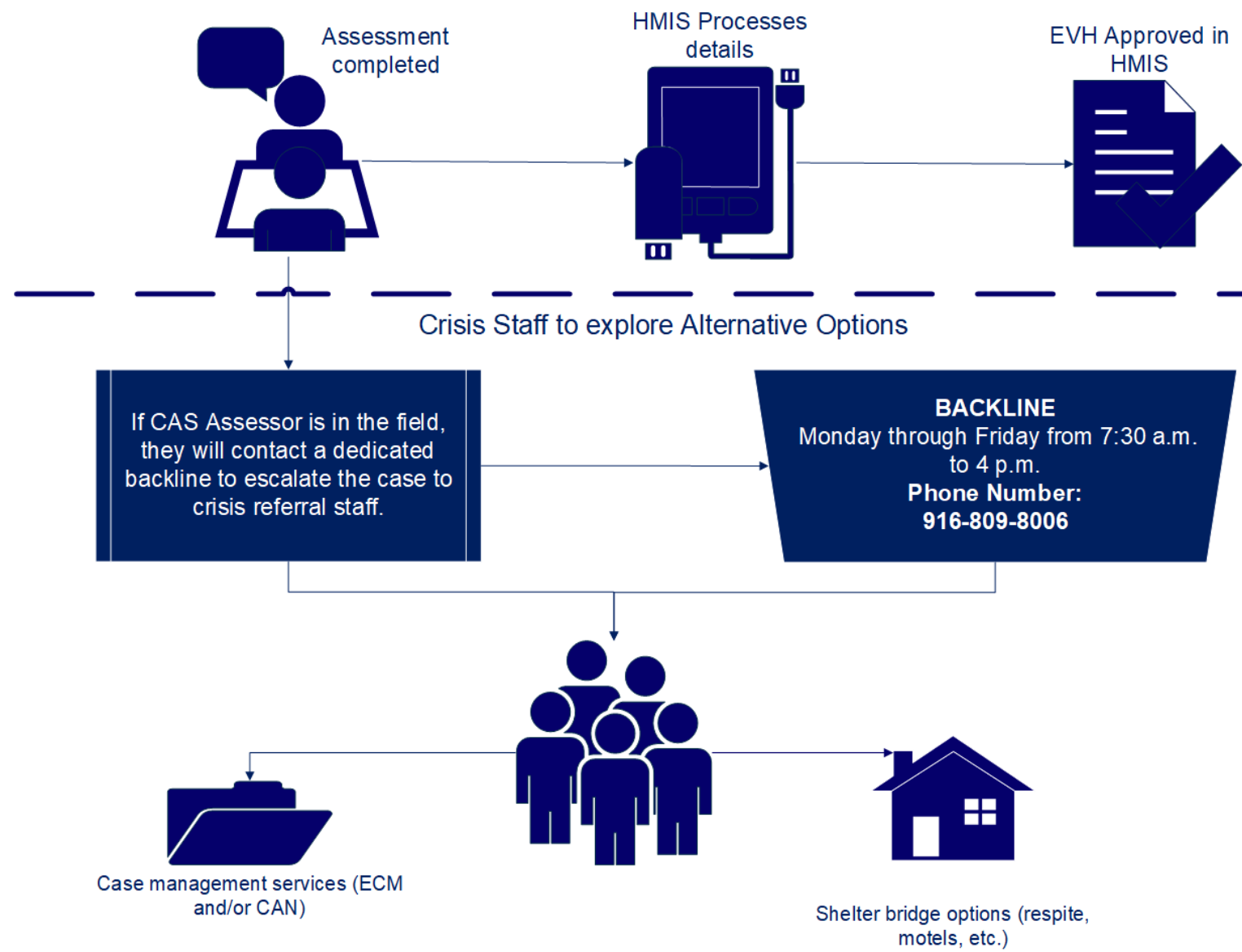
CAS
Processes & Tools

The **Extremely Vulnerable Households (EVH)** policy immediately prioritizes households for the next available and appropriate unit regardless of current geographic location.

EVH is defined as:

- Individuals scoring 6+ on HCT or Crisis Assessment
- Families scoring 10+ on HCT or Crisis Assessment

Why develop this policy?

- Geographic preference was considered over a person's vulnerability for most individual shelter placements.

- Improved case-carrying support for client re-engagement after initial contact.

- Opportunity to rapidly **place households into a shelter when initially presenting** – no longer frustrating service providers who seek to "strike while the iron is hot".

- Alignment between shelter and housing prioritization – meaning **shelter stays are shortened to no than longer necessary** and shelters often rehouse clients supported by CoC supports.

Assessment completed

HMIS Processes details

EVH Approved in HMIS

Crisis Staff to explore Alternative Options

If CAS Assessor is in the field, they will contact a dedicated backline to escalate the case to crisis referral staff.

BACKLINE
Monday through Friday from 7:30 a.m. to 4 p.m.
**Phone Number:
916-809-8006**

Case management services (ECM and/or CAN)

Shelter bridge options (respite, motels, etc.)

Crisis staff will review the client's eligibility and determine if a same-day shelter referral can be made.

If client is unable to be placed into an emergency shelter, the crisis referral staff will explore alternative options until a shelter intake appointment can take place.

Once client is connected to an emergency shelter, case management staff will support with getting client "doc-ready" for CoC housing options

EVH clients will be prioritized for CoC Housing options such as Rapid Re-Housing and Permanent Supportive Housing.

Join CAS:

The CAS Committee meets on the 2nd Thursday of the month to oversee the design and implementation of the local CAS, evaluate its functioning, and assess the impact on improving access and connection to services within the local homeless response system.

CAS Office Hours
Mondays 2:30pm-3:30pm
Email CAS@sacstepsfroward.org

Frontline Learning Collaborative (FLC): Meets on the 4th Thursday of the Month, for frontline workers in the homeless response system, offering provider spotlights to bring awareness to homeless services.

Case Conferencing: An action-oriented program **improving coordination among homelessness service providers** to transition clients into housing swiftly. Operating on a 3-month cycle with weekly meetings.

CAS Information

Join HMIS and sign up to become a CAS Assessor: HMIS Access Request Form (jotform.com)

Join our mailing list: info@sacstepsforward.org

Get trained in Housing Problem-Solving: HPS Registration Link

For any CAS-specific questions, grievances: CAS@sacstepsforward.org

Q&A

Do you have any unanswered questions about CAS processes or tools?

We will return shortly
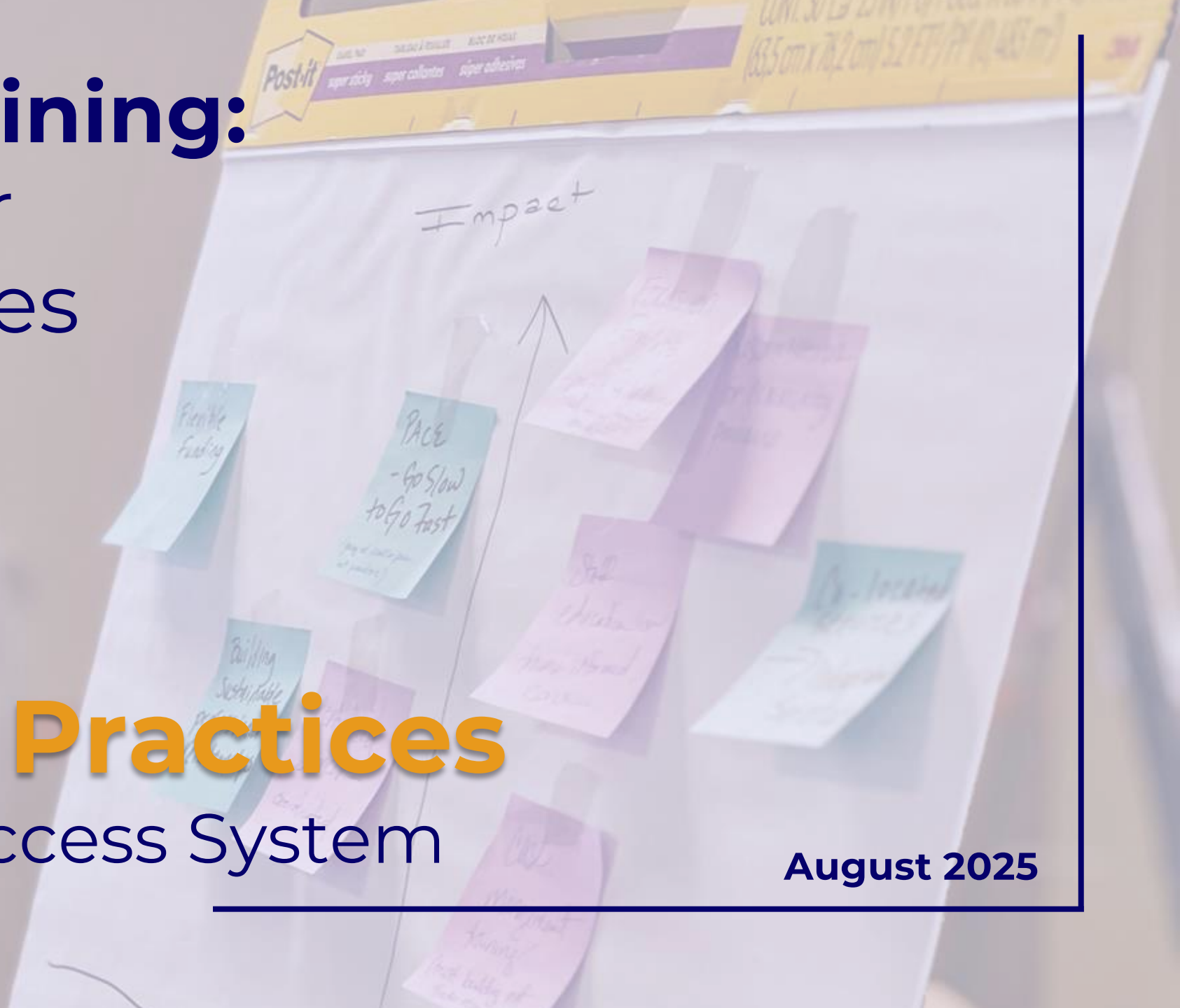
CAS Best Practices

Understand the Housing Conversation Tool.
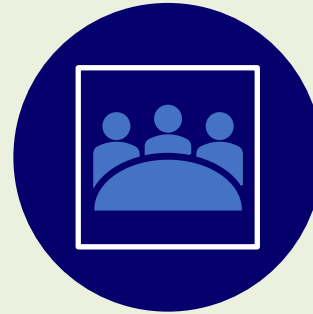
Apply best practices for assessments & planning.

Ensure compliance & effective data management.

Understanding the Housing Conversation Tool (HCT)

# VI-SPDAT Replacement Background

The VI-SPDAT promoted racial disparities.

A workgroup was formed that included individuals with lived experiences of homelessness, members of the Racial Equity Committee, and various community partners to develop an alternative tool.

The HCT is not designed to understand a household's holistic needs. Instead, it focuses on triaging and identifying the most urgent cases for intervention while providing a blueprint for assessors to develop an individualized service plan (ISP).
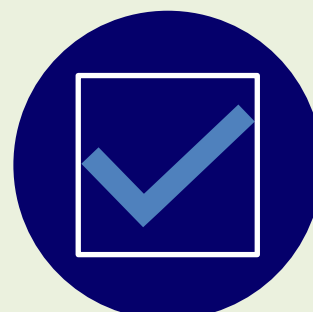
This change provided us with an opportunity to align resource prioritization and reset and standardize CAS Assessor expectations and best practices.

Benefits of the Housing Conversation Tool

- **Single Tool** for all household types. All previous housing assessment tools have been combined.

- **Broader applicability:** All homeless types and at-risk can be assessed.

- **Fewer questions** and trauma informed phrasing.

- Designed with a **human-centered and racial equity focus.**

- **Developed by people with lived expertise of homelessness with broad community feedback**

- Only available under the CAS Assessor Agency (HMIS).

CAS ASSESSMENTS AND BEST PRACTICES

Housing Conversation Tool

Assessment Date	08/19/2024
Assessment Level	Housing Needs Assessment
Assessment Location	211
Assessment Type	Phone

⚠ Some questions are sensitive in nature and may bring up past traumas for you and/or your household.

Some programs serve specific household types. Please let us know what is your preference or which household type matches your current needs.. — Family Households (At least 1 Adult & 1 Minor Child)

HOUSEHOLD INFORMATION

Is anyone in your household pregnant? — Yes

How many children are in your household?	1
How many children in your household are under five years old?	1
Do you have custody of your children?	Yes
Is your household a single-parent household?	No
Were any of the young adults (18 - 24 years old) in your household enrolled in foster care after the age of 16?	No

INCOME INFORMATION

What is your (Head of Household) monthly income before taxes (Gross Income)?	1482.00
What is the monthly income before taxes of the other adult members of your household?	0.00
Gross Monthly Household Income	1482.00
Gross Annual Household Income	17784.00
Where does the the household's income fall when compared to the Annual Median Income (AMI) for Sacramento County?	25% AMI or les

2025 | SACRAMENTO STEPS FORWARD

CAS Assessments and
Best Practices

CAS Assessor Best Practice Guide

- Comprehensive manual and best practice guide for CAS Assessors using the Housing Conversation Tool (HCT)

- Covers information in more detail than this training.

- Intended to be a resource, especially for new staff.

- Includes a **resource guide** in the appendix to help connect clients to appropriate programs/services.

The Sacramento

Housing Conversation Tool

Best Practices Guide

SACRAMENTO
STEPS FORWARD

Coordinated Access System (CAS)

ssf-sacramento-housing-conversation-tool-best-practice-guide.pdf

CAS Assessments - Summary

CAS Assessors will utilize **three primary assessments** in HMIS:

The Crisis Assessment,

Housing Conversation Tool (HCT) and the

Individualized Service Plan (ISP).

- ☑ **The Crisis Assessment:** For Shelter, PSAP, and Case Management programs.

- ☑ **Housing Conversation Tool (HCT):** For CAS-participating housing programs.

- ☑ **Individual Support Plan (and Case Conferencing Tool):** For developing and providing updates on housing-related goals and activities.

- ☑ **Case Conferencing Tool:** For collaborative information between providers and CAS about a client's journey to housing.

- ☑ **Current Living Situation**: Helps identify a client as currently experiencing homelessness in HMIS.

CAS Assessments – Resource Process Map

Client needs Shelter? → Current Living Situation → Crisis Assessment

Client needs Housing Resources? → Current Living situation → Housing Conversation Tool → Individual Support Plan → Case Conferencing Tool

Clients seeking homeless prevention? → Current Living Situation → Crisis Assessments
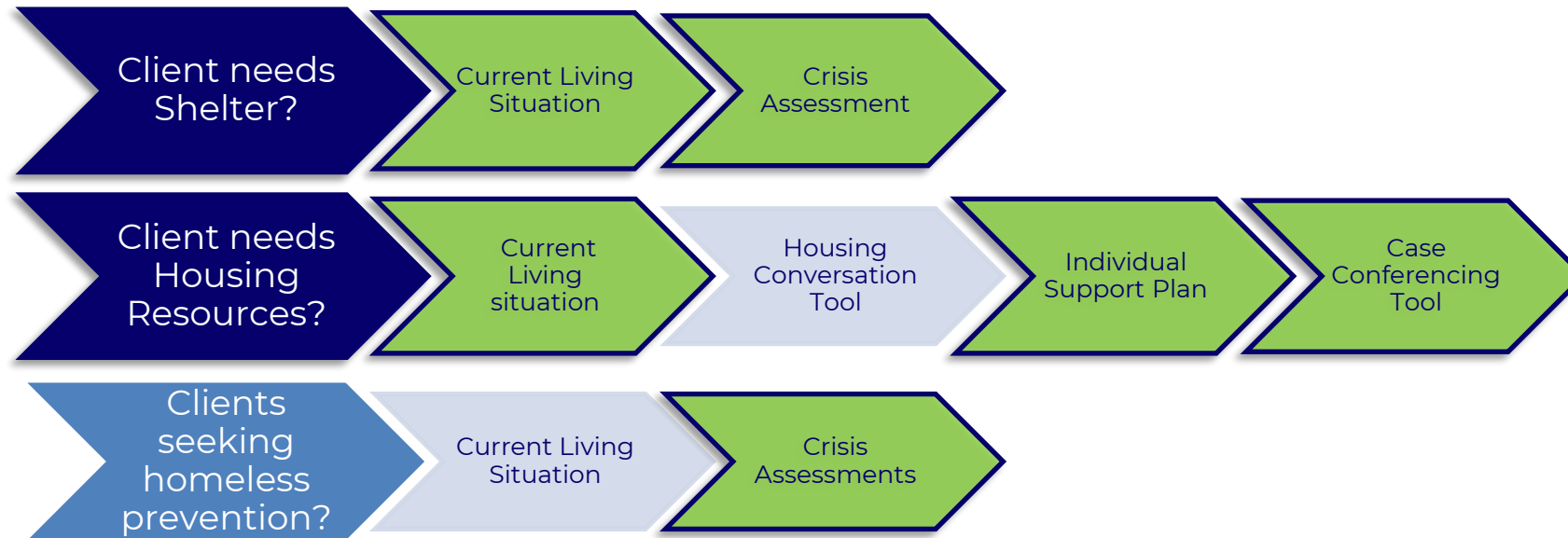
How to Administer CAS Assessments

- Develop rapport and trust through trauma informed practices.

- Conduct with empathy.

- Address crises before conducting HCT.

- Conduct in a safe and confidential environment.

- Explain the purpose of the assessment and how it will be used.

- **Do not guarantee housing or services.**

- Escalate *extremely vulnerable clients* appropriately.

Crisis Assessment

Summary of the major changes

- Replaces the Shelter Survey

- Can assist with determining PSAP eligibility (if applicable)

- Usable with at-risk and households experiencing homelessness

- One assessment for families and individuals

- **Responses will "cascade" into the HCT (up to 60 days)**

HMIS Job Aid

CRISIS ASSESSMENT (CA - 503)

Assessment Date	12/10/2024
Assessment Level	Crisis Needs Assessment
Assessment Location	211
Assessment Type	Phone

CONTACT AND LOCATION INFORMATION

⚠ SURVEYOR:
Please take a moment to update this client's contact information in the **CONTACT tab**.
2-1-1 must have current contact information to reach the client about potential referrals to services/programs.

Is it okay to leave a voicemail or text message for the client using the client's contact information?

Some programs serve specific household types. Please let us know what is your preference or which household type matches your current needs.
Adult Only Households (No Minor Children)

HOUSEHOLD INFORMATION

Are any members of your Household 55 years of age or older?
Yes, there is a household member between the age of 55 and 61.

Is anyone in your household pregnant?
Yes

Crisis Assessment Details

WHO completes it?

- **CAS Assessors**

WHAT info is captured?

- **Vulnerabilities**
- **Housing Barriers**
- **Shelter Eligibility**
- **Prevention Services Pre-Screening**
- **Supportive services**

WHEN does it get completed?

- **If a client is experiencing a housing crisis and expresses an interest shelter, prevention services or any other supportive services.**

HOW is this assessment used?

Determine eligibility for:
- **Shelter**
- **Supportive Services (Prevention, CALAIM, etc.)**

Housing Conversation Tool

Summary of the major changes

- Replaces the VI-SPDAT

- Can assist with determining Housing program eligibility

- Usable with at-risk and households experiencing homelessness

- One assessment for families and individuals

HOUSING CONVERSATION TOOL (HCT) [CA-503]

Assessment Date	02/06/2025
Assessment Level	Housing Needs Assessment
Assessment Location	211
Assessment Type	In person

⚠ Some questions are sensitive in nature and may bring up past traumas for you and/or your household.

Some programs serve specific household types. Please let us know what is your preference or which household type matches your current needs.. — Adult Only Households (No Minor Children)

HOUSEHOLD INFORMATION

Are any members of your Household 55 years of age or older?	Yes, there is a household member between the age of 55 and 61.
Has anyone in your household ever been on active duty in the United States military?	No
Is anyone in your household pregnant?	No
How many children are in your household?	0
Were any of the young adults (18 - 24 years old) in your household enrolled in foster care after the age of 16?	No

HMIS Job Aid

Housing Conversation Tool Details

WHO completes it?

- **CAS Assessors**

WHAT info is captured?

- **Vulnerabilities**
- **Housing Barriers**
- **Housing Eligibility**
- **Supportive services**

WHEN does it get completed?

- **If a client is experiencing a housing crisis and it is determined the client would need added resources for housing stability.**

HOW is this assessment used?

Determine eligibility for:
- **Housing**
- **Supportive Services for housing programs**

Individual Support Plan (ISP) details

- Reflects the client's preferences and provide a structured approach to achieving their housing goals.

- Establishes a Support Team tailored to client's needs

- Updated **as needed based** on changes in the client's situation or goals

CAS INDIVIDUAL SUPPORT PLAN (ISP)

Assessment Date   07/03/2025

SUPPORT TEAM

Rehousing Entity/Person (Name)

Email   Phone   XXX-XXX-XXXX

Primary Case Manager or Social Worker (Name)

Email   Phone   XXX-XXX-XXXX

Peer Support (Name)

Email   Phone   XXX-XXX-XXXX

Physical Health Team (Name)

Email   Phone   XXX-XXX-XXXX

Behavioral Health Team (Name)

Email   Phone   XXX-XXX-XXXX

Other Support Team Member (Name)

Email   Phone   XXX-XXX-XXXX

SMART HOUSING GOALS

Individual Support Plan Details

WHO completes it?

- **CAS Assessors**

WHAT info is captured?

- **Connected to Client**
- **Defined Roles**
- **Gap Analysis in case management services**
- **Housing Goals and barriers**

WHEN does it get completed?

- **Immediately after completing the Housing Conversation Tool**
- **Whenever there are changes in care or the housing goal updates**

HOW is this assessment used?

- **This is used as community tool for all providers connected with the client.**

Case Conferencing (CC) Details

- A collaborative Tool for providers and the CAS staff

- Provides a way to give information about where clients are in their housing journey.

- HMIS Job Aid - Case Conference Tool.docx

Case Conferencing Details

WHO completes it?

- CAS Assessors

WHAT info is captured?

- Providers working with the client
- Barriers
- Context around needs and current situations
- Document readiness status

WHEN does it get completed?

- Anytime

HOW is this assessment used?

- To communicate the journey and the status of the client.

Current Living Situation (CLS) Details

- The CLS provides an update on the client's situation and is needed to document homeless chronicity and determine location based eligibility.

- Current-Living-Situation-Finalized-10-22-24.pdf

PROGRAM: CAS: COORDINATED ACCESS SYSTEM PROGRAM - CE

| Enrollment | History | Provide Services | Events | **Assessments** | Notes | Files | Forms |

Add Current living situation for client Mother Test (She/Her/Hers)

Date of Contact	07/08/2025
Current Living Situation	Select
Living Situation Verified By	Select
Location	ADD LOCATION
Location Details	

SAVE & NEXT   CANCEL

Current Living Situation Details

WHO completes it?

- CAS Assessors

WHAT info is captured?

- Account of the witnessing the client experiencing homelessness
- General location

WHEN does it get completed?

- Anytime

HOW is this assessment used?

- To keep the client active in the CAS agency
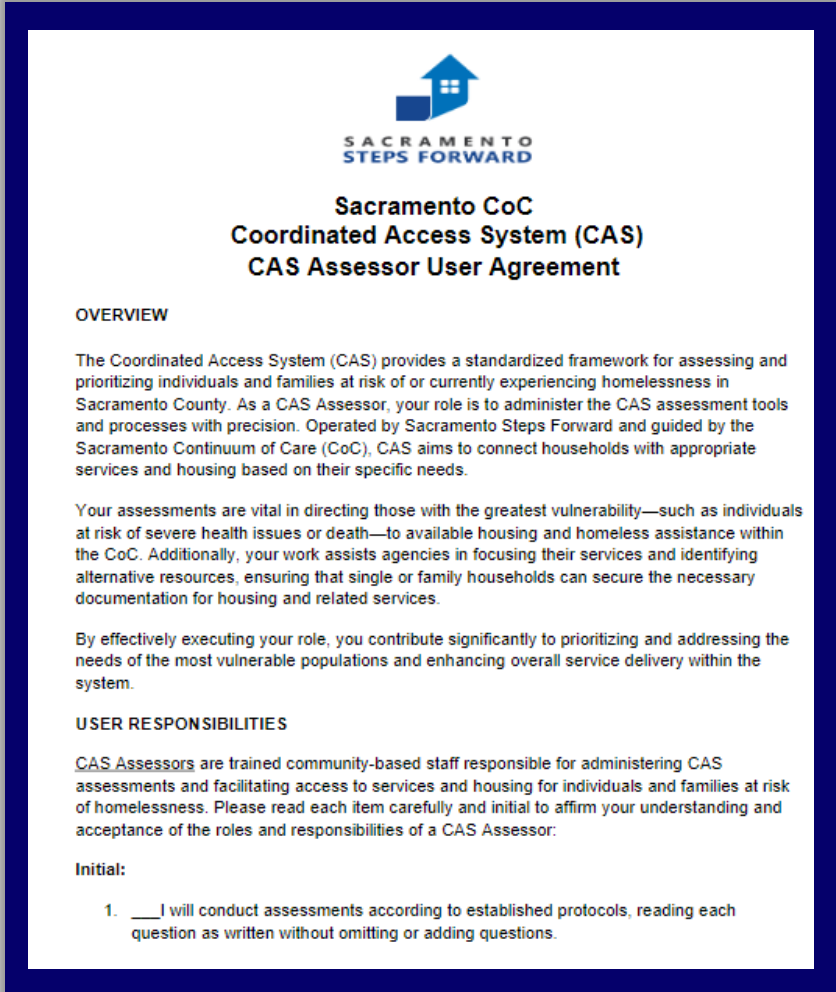- Add data points to verify chronicity of homelessness

Pop quiz!
Please answer the poll.

1. CAS Assessors should not explain how assessments or CAS works. It's better if the client doesn't understand how complicated the system is.

2. As a CAS Assessor, it is permissible to change the client's assessment answers so you can get your client housed quicker.

CAS Assessor User Agreement

- All staff who wish to remain a CAS Assessor must sign and return this form.

- Outlines the CAS Assessor responsibilities and code of ethics.

- Initial and read each section carefully.

- This is automated and can be signed digitally.

- Covers all CAS assessments and assessor responsibilities, not just the housing conversation tool.

Sacramento CoC
Coordinated Access System (CAS)
CAS Assessor User Agreement

OVERVIEW

The Coordinated Access System (CAS) provides a standardized framework for assessing and prioritizing individuals and families at risk of or currently experiencing homelessness in Sacramento County. As a CAS Assessor, your role is to administer the CAS assessment tools and processes with precision. Operated by Sacramento Steps Forward and guided by the Sacramento Continuum of Care (CoC), CAS aims to connect households with appropriate services and housing based on their specific needs.

Your assessments are vital in directing those with the greatest vulnerability—such as individuals at risk of severe health issues or death—to available housing and homeless assistance within the CoC. Additionally, your work assists agencies in focusing their services and identifying alternative resources, ensuring that single or family households can secure the necessary documentation for housing and related services.

By effectively executing your role, you contribute significantly to prioritizing and addressing the needs of the most vulnerable populations and enhancing overall service delivery within the system.

USER RESPONSIBILITIES

CAS Assessors are trained community-based staff responsible for administering CAS assessments and facilitating access to services and housing for individuals and families at risk of homelessness. Please read each item carefully and initial to affirm your understanding and acceptance of the roles and responsibilities of a CAS Assessor:

Initial:

1. ___I will conduct assessments according to established protocols, reading each question as written without omitting or adding questions.

Q&A

Do you have any unanswered questions about CAS processes or tools?

Stay in the Know

Sign up to receive Provider Training updates
Subscribe to the SSF monthly newsletter
Follow us on social media

Visit us at **sacramentostepsforward.org**