Veteran By-Name List

ServicePoint Handbook

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Version 1.0

PORTLAND HOUSING BUREAU

REVISION HISTORY

- **4/9/2018 –** V1.0 Released: Covers the VBNL workflow, using the Coordinated Access ROI and a referral to Coordinated Access for Adults or Coordinated Access for Families.

SURVEYING VETERANS EXPERIENCING HOMELESSNESS

The Veteran By-Name List (VBNL) is a tool for providers to coordinate efforts to serve Veterans experiencing homelessness. The list promotes collaboration across agencies in the community to efficiently connect Veterans to housing and supportive services. The goal of the VBNL is to find the most suitable permanent housing solution for each Veteran through a streamlined housing process.

Any agency with ServicePoint access can add a Veteran to the VBNL by creating a referral.[1] The VBNL workflow has been consolidated with the Coordinated Access workflow to create a more simplified process. One referral to the appropriate provider, either Coordinated Access for Adults or Coordinated Access for Families, will simultaneously add any participant who identifies as a Veteran to the VBNL.

Who should be referred to the Veteran By-Name List?

- Anyone who has ever served in the U.S. Armed Forces (Army, Navy, Air Force, Marine Corps, or Coast Guard) or been called into active duty by the National Guard or as a Reservist, regardless of discharge status
- 18 years old or older
- Entering from a homeless situation or temporary shelter[2]
    - Place not meant for habitation, Emergency Shelter, or Transitional Housing

More and more agencies in our community are taking part in the Veteran By-Name List. Many of these agencies also attend the Veterans Coalition meeting to work on case conferencing, supported by leadership from Transition Projects and the Department of Veteran Affairs.

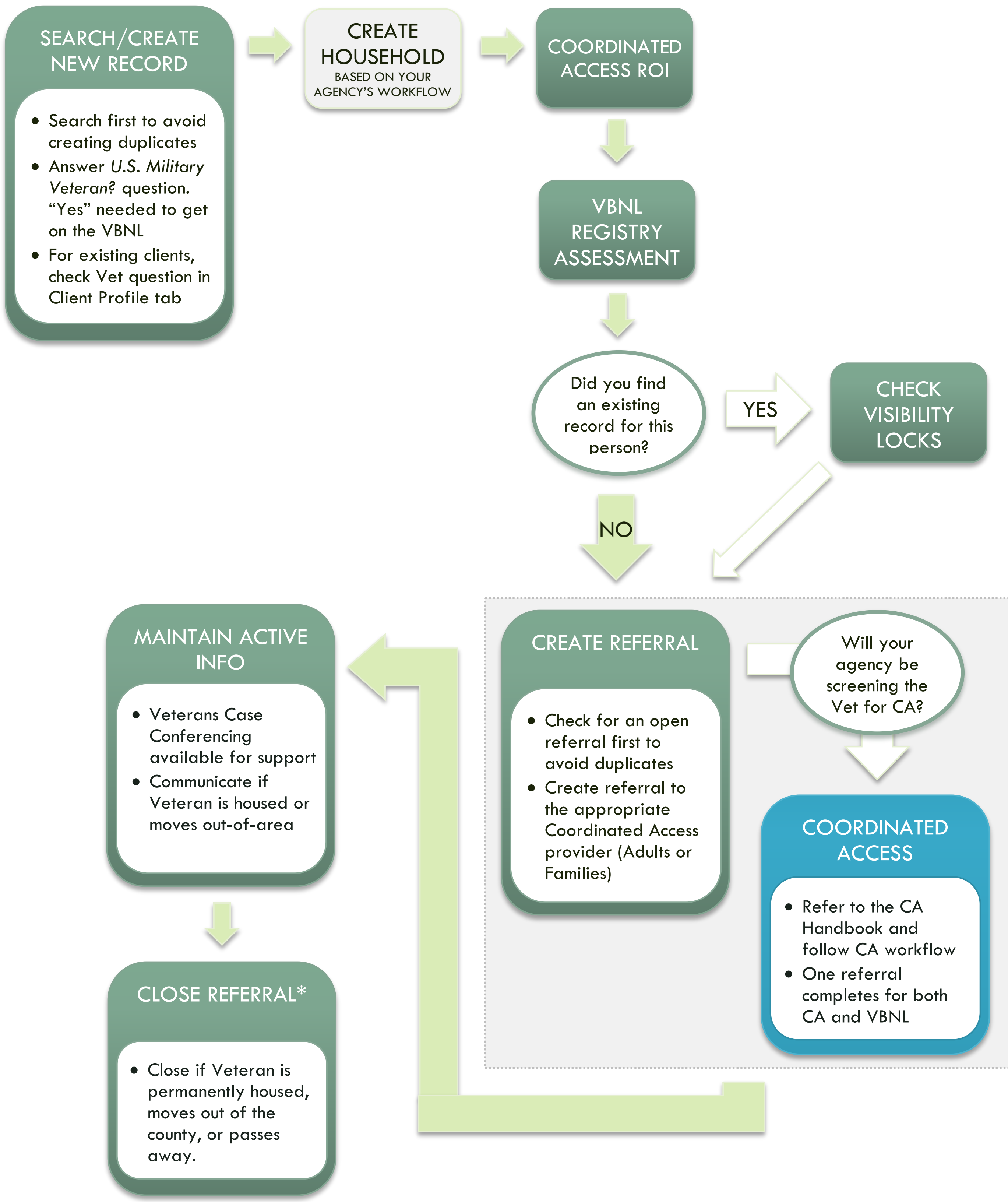
For the most current list of participating agencies, plus other helpful resources and documents, please refer to the Coordinated Access website:

ahomeforeveryone.net/coordinatedaccess/

[1]Please reach out to a System Administrator if you notice any settings are missing at your provider.

[2]In some instances, a Veteran in Rapid Rehousing may be added to or remain on the list in order to fulfil eligibility requirements for certain programs, such as VASH.

VETERAN BY-NAME LIST WORKFLOW



*Specific guidelines of when to close a referral are under development.

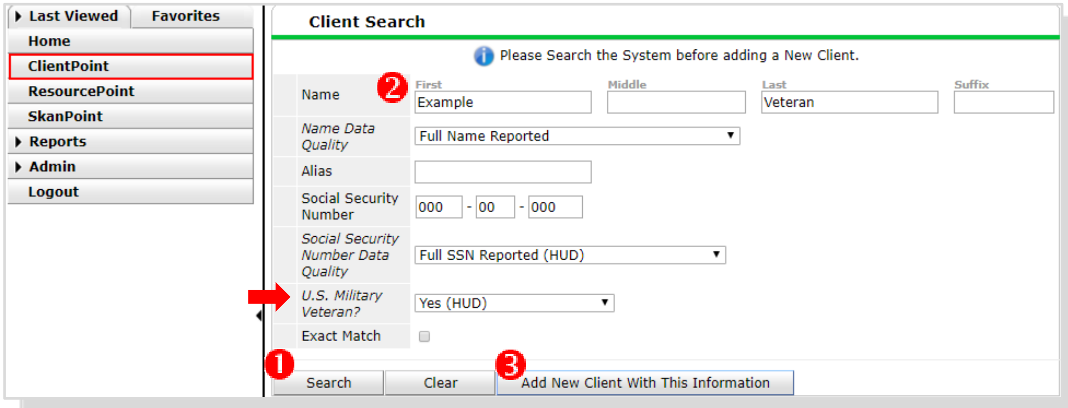
1. CLIENT SEARCH/CREATE NEW RECORD

Always check for an existing client record first to avoid making duplicates. Compare the demographics to determine if it is a positive match.

❶ In ClientPoint, do a broad search for an existing record.
Eg. first 3 letters of the first name and last name
Click “**Search**”.

❷ If there is no match, fill in the rest of the name and answer all applicable questions.

U.S. Military Veteran? must be answered “Yes” to get on the VBNL.



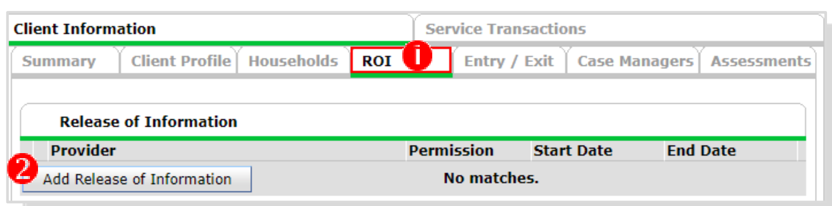
Example: Adding a new record

❸ Click “**Add New Client With This Information**”.
Click “**OK**” to continue.

2. RELEASE OF INFORMATION (ROI)

❶ Go to the ROI tab.

❷ Click “**Add Release of Information**”.

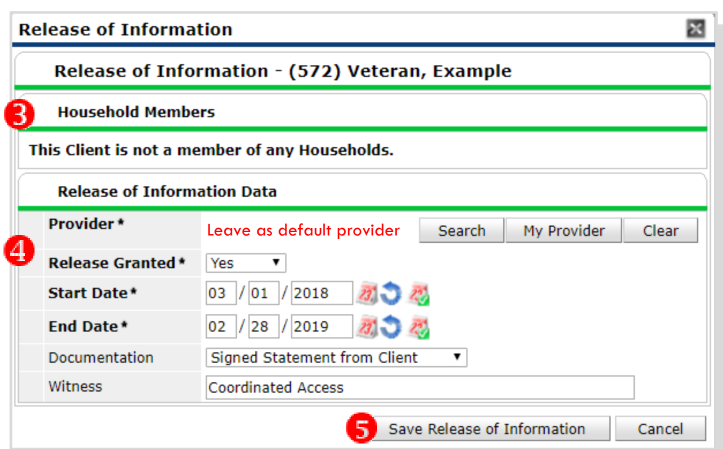


❸ Select the appropriate household members (if applicable).

❹ Fill in the remaining fields:

- **Provider:** Leave as your default provider.
  Click “My Provider” if value was cleared.
- **Release Granted:** Yes or No
- **Start Date:** Date consent was signed
- **End Date:** Date consent expires based on the ROI
- **Documentation:** Select appropriate response
- **Witness:** Type “Coordinated Access”

❺ Click “**Save Release of Information**”.



Example 1-year ROI

3. "OR-501: VETERAN BY NAME LIST REGISTRY" ASSESSMENT

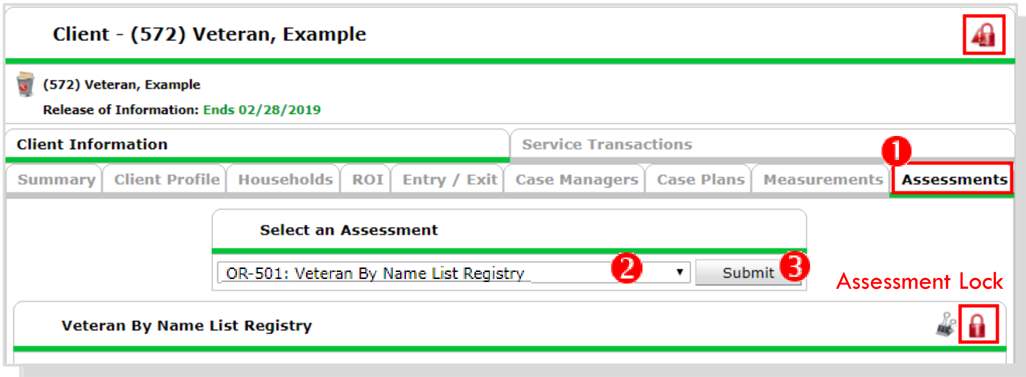
❶ Go to the Assessments Tab.

❷ Open the dropdown menu and select the assessment "OR-501: Veteran By Name List Registry".

❸ Click "**Submit**".

❹ Answer questions and click "**Save**". Be sure to record contact information. If you have questions, reach out to your admin or a ServicePoint support staff.

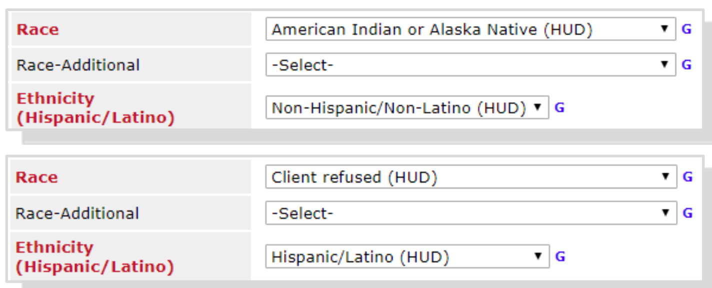
Client Record Lock



Assessment Lock

How to answer Race and Ethnicity?

- Race-Additional is an optional field that can be left blank if the Veteran only identifies with one race.
- If a Veteran does not identify with any of the race options and only as Hispanic or Latino, it is correct to enter
  Race: Client refused
  Ethnicity: Hispanic/Latino



Examples

Did you find an existing record for this person?

NO → New record, skip to Page 9

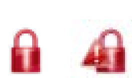
YES → Check Visibility Locks

VISIBILITY LOCKS (HISTORICAL RECORDS ONLY)

Historical client records may require adjustments to visibility locks in order to allow the record and the assessment data to be visible to other agencies.

There are two red locks to check (labeled in screenshot above):

- Client Record Lock (p. 7)
- Assessment Lock (p. 8)

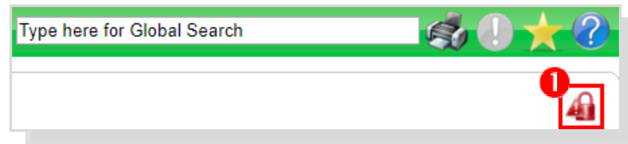


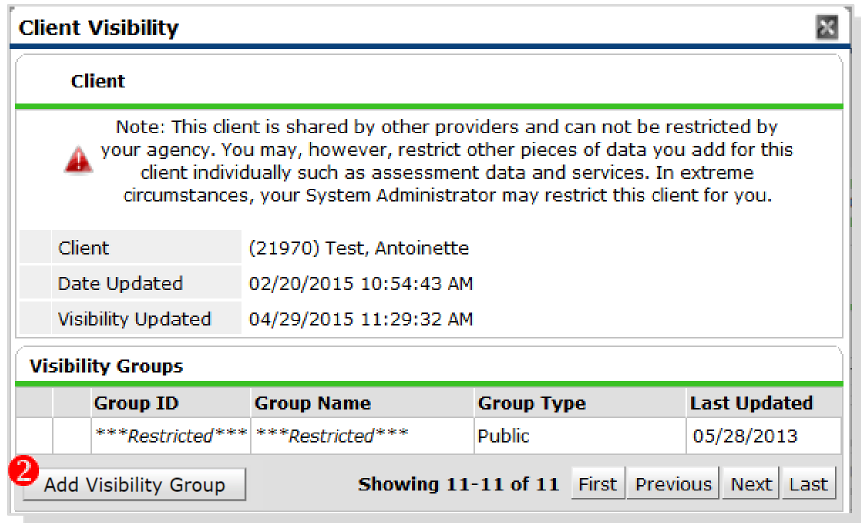
Be extremely mindful when unlocking visbility locks. Contact an admin immediately if there is an error.

Client Record Lock

- Unlocks the “head” of the client record, the minimum number of elements needed to identify duplicates. This step allows the record to appear in searches by agencies authorized to see it.

❶ After saving the assessment responses, click the red lock at the top upper-right, underneath the question mark.



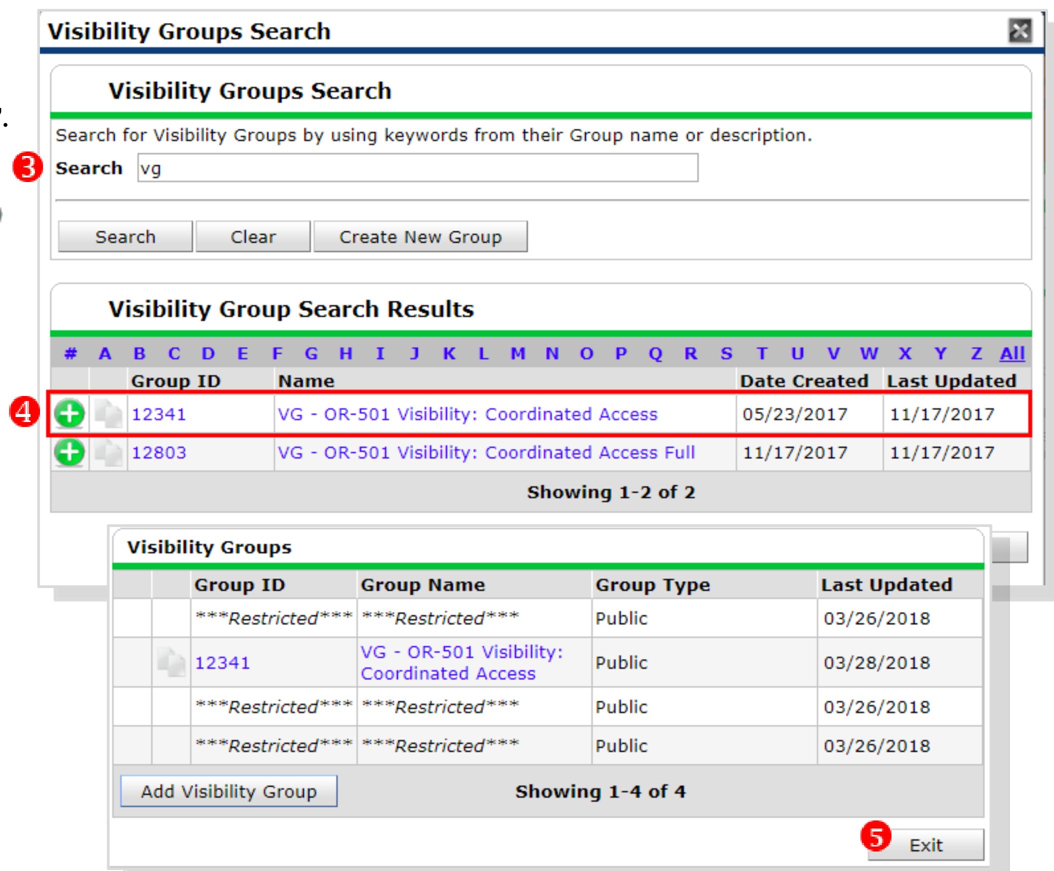


❷ Is this record already shared to the Coordinated Access visibility group? If no, click “**Add Visibility Group**”.

❸ Type “vg” and click “**Search**”.

❹ Click the green circle icon to add the visibility group: “VG - OR-501 Visibility: Coordinated Access”. Do NOT select the CA “Full” version for historical clients.

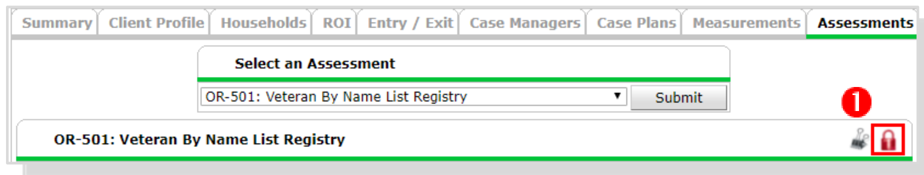
❺ Click “**Exit**” to close.



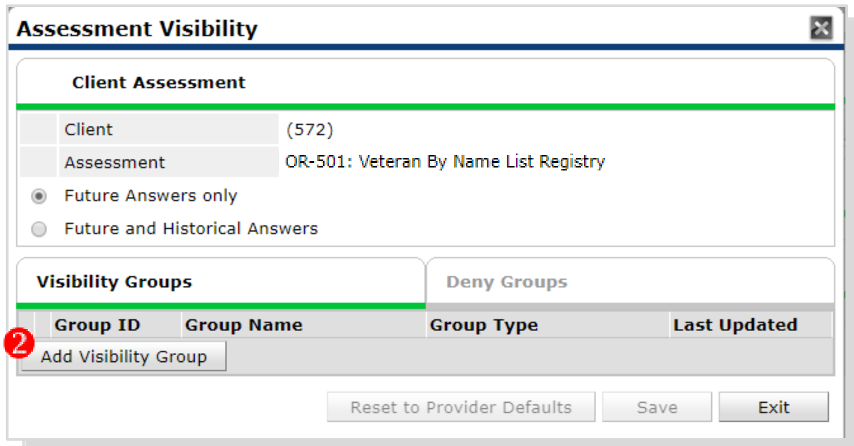
Assessment Lock – OR-501: Veteran By Name List Regstry

- Unlocks the data in a specific assessment.

❶ With the "OR-501: Veteran By Name List Registry" assessment open, click the red lock to the far right of the assessment's title.

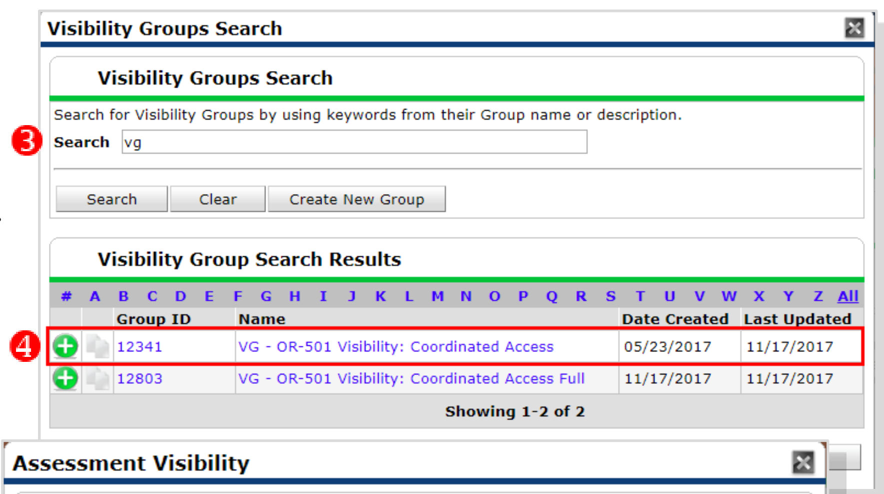


❷ Is this assessment already shared to the Coordinated Access visibility group? If no, click "**Add Visibility Group**".



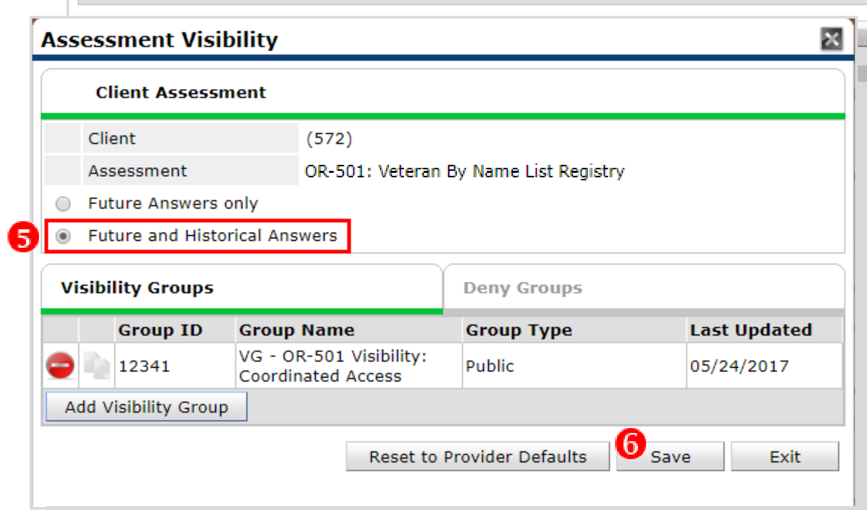
❸ Type "vg" and click "**Search**".

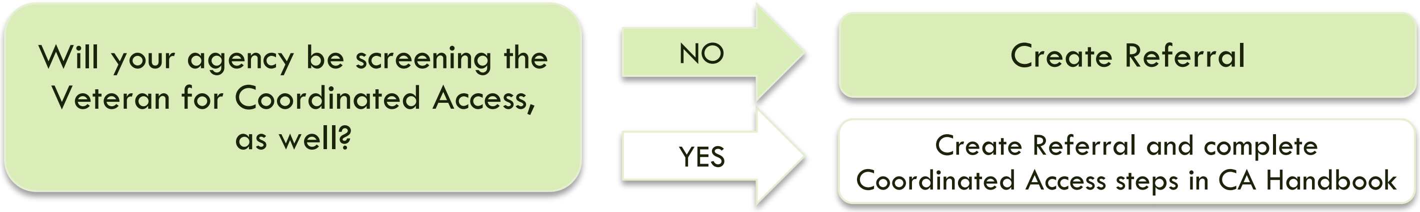
❹ Click the green circle icon to add the visibility group: "VG - OR-501 Visibility: Coordinated Access". Do NOT select the CA "Full" version for historical clients.



❺ Select "**Future and Historical Answers**".

❻ Click "**Save**".





4. CREATE REFERRAL

The referral process for the VBNL is the same as Coordinated Access. Depending on how the Veteran presents at your agency, select the appropriate referral provider:

OR-501: Coordinated Access for Adults [single or adult-only family]
OR OR-501: Coordinated Access for Families with minor children [<18 years old]

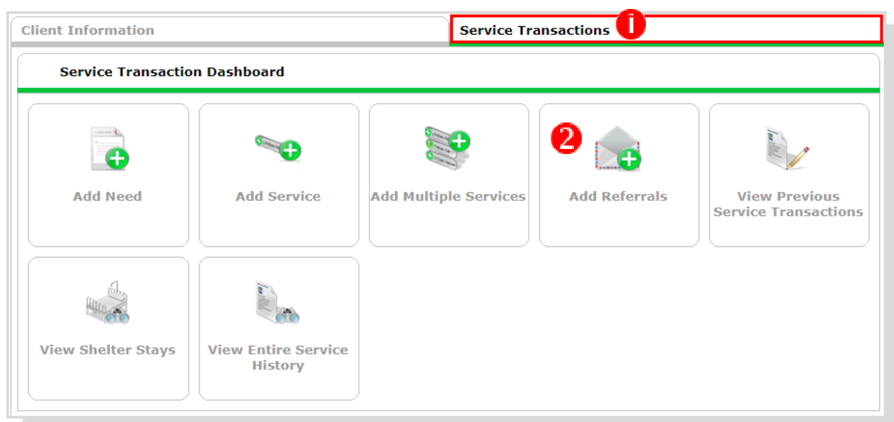
If there is a possibility that the client already has a referral to a by-name list, you can check for open referrals by clicking "**View Entire Service History**" and going to the Referrals Tab. Only one open referral is needed, so please save your time by not creating a duplicate.

Two places where you can access the "**Add Referrals**" button:

1. Service Transactions Dashboard
2. Referrals Tab

❶ Go to the Service Transactions Tab.

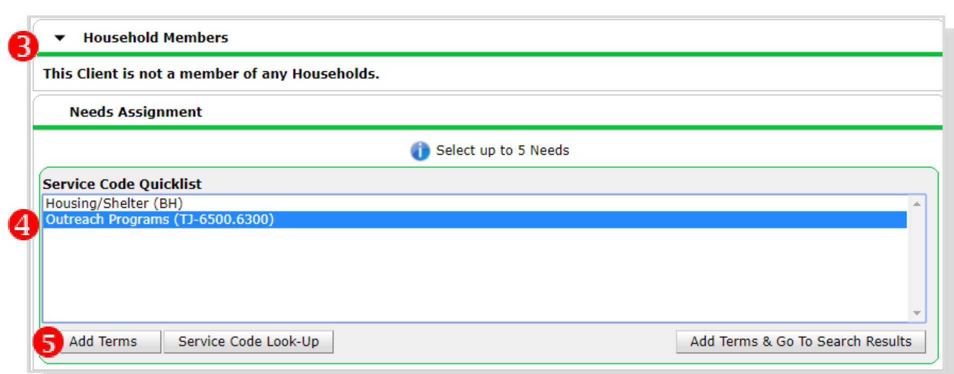
❷ Click "**Add Referrals**"



❸ Do NOT include any other household members.

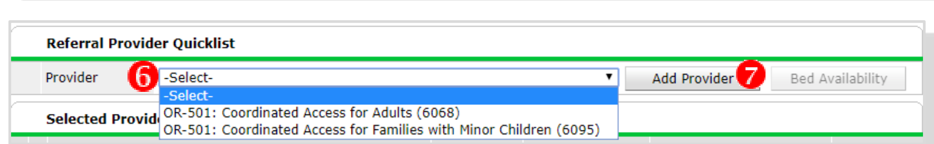
❹ In the Service Code Quicklist, select "**Outreach Programs**".

❺ Click "**Add Terms**".

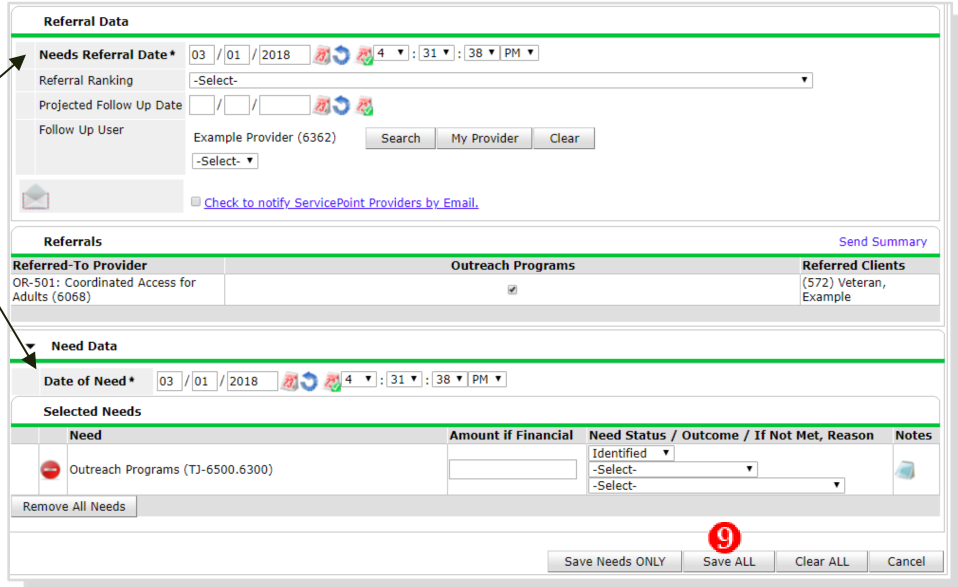


❻ Select referral provider: **OR-501: Coordinated Access for Adults** or **OR-501: Coordinated Access for Families with minor children**

❼ Click "Add Provider".

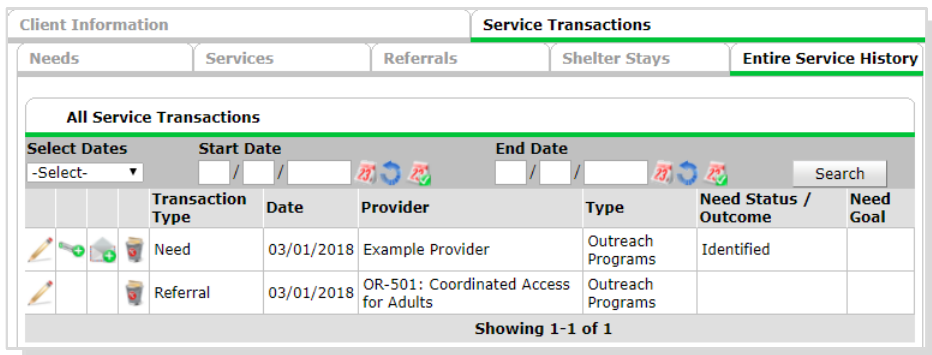


❽ Enter the Needs Referral Date and Date of Need as the same date the client signed the ROI.
This date cannot be earlier than the start date of the ROI.



❾ Click "**Save ALL**".
Do NOT click "Save Needs Only" as this will not save the referral.

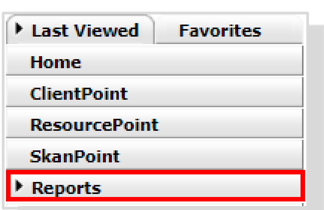
A successfully created referral will have both a Need and a Referral. View in the Entire Service History Tab.



Example Referral

REFERRALS REPORT

Run the Referrals Report to see all the clients who were referred by your agency. If someone is missing from the report, you can check if the referrals were done correctly.



- **Provider:** Leave as your default provider
- **Referral Type:** Outgoing referrals from provider
- **Referral Status:** All
- **Referral Date Range:** Limit it to a specific date range, like a day or a week
- **Sort Order** (optional): Choose which column to sort by

Click "**Build Report**".

Reports are ordered alphabetically. The Referrals Report is near the bottom, next to Service Transaction.