Coordinated Access for Adults and Families

ServicePoint Handbook

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General Questions or Adult System HMIS Technical Assistance:
  Contact Wendy Smith, 503.823.2386, wendy.smith@portlandoregon.gov
Family System HMIS Technical Assistance:
  Contact ServicePoint Helpline at 503.970.4408, servicepoint@multco.us, http://multco.us/servicepoint

Version 2.0
REVISION HISTORY

- **October 16, 2019** – Version 2.0: Changed contact information for questions. Edited instructions for family and adult assessments to reflect the alignment of local questions.
- **August 27, 2018** – Version 1.9: Updated MHT agencies. Added CHAT agencies conducting family assessments. Edited instructions for visibility and unlocking clients’ records. Added instructions for entering recovery-oriented housing questions.
- **February 16, 2018** – Version 1.8: Visibility and unlocking the client’s record updated.
- **December 21, 2017** – Version 1.7: Updated instructions for creating a referral to emphasize NOT to pull in additional household members.
- **October 10, 2017** – Version 1.6: ROI instructions updated.
- **August 1, 2017** – Version 1.5: Clarified that questions are intended to be asked on behalf of the entire family only for the VI-SPDAT assessment portion of the Coordinated Access Family with Minor Children screening.
- **July 26, 2017** – Version 1.4: Corrected page numbers on “Contents” section of front page; Renamed “Remove Referral” to “Cancel Referral”; Corrected instructions for “Cancel Referral” on pg. 19; other minor changes.
- **July 10th, 2017** – Version 1.3:
  - Corrected phone number for Hunter Belgard.
  - Made additional edits for clarity and readability.
- **July 6th, 2017** – Version 1.2:
  - Made changes to cover page to add contact information for Hunter Belgard of the Portland Housing Bureau.
  - Made changes to Program Model on page 3 to clarify definitions of “families” vs. “adults”. “Families” are adults with minor children; “Adults” may have children, too, but all are over the age of 18.
  - Made changes to Data Milestones on page 4 to add “CLIENTPOINT” for those service providers who may need to create new clients before recording screening.
  - Added clarification on page 7: “If previous screening was completed more than 6 months prior, add a new screening.”
  - Made various edits for clarity and readability.
- **June 9, 2017** – Version 1.1: Made change to work flow for Coordinated Access for Adults on pages 9 and 16. Add contact information and make referral to the program OR-501: Coordinated Access for Adults regardless of total assessment score.
- **May 15, 2017** – Version 1.0: Added instructions along with screen shots for screening assessments and a section on how to remove a referral.
- **May 3, 2017** – Version 0.0: Created and published document.
Families

Coordinated Access process works with families (adults with children under the age of 18) to create a single process for receiving homeless family services. Families can access services by calling 211, talking to shelter personnel, or through staff at participating Mobile Housing Team (MHT) Agencies. Families are screened for vulnerability and/or other opportunities. If the family meets program eligibility requirements, they will be contacted by a participating agency (see chart below for agency names). *Note: additional agencies may be added.

**Mobile Housing Team Agencies**
- IRCO, El Programa Hispano Catolico, Latino Network, NARA, NAYA, JOIN, and SEI)*

**211**

**Coordinated Access for Families**
- CHAT (NARA and El Program Hispano Catolico)

**Homeless Family Shelters**
- Human Solutions & PHFS

Adults

Coordinated Access for Adults works with unaccompanied adults, adults in couples, and households with adult dependents (all children must be over the age of 18). Adult households can access an assessment through the Coordinated Housing Access Team (CHAT) or through any of the Partner Agencies that conducts assessments. The assessment screens for vulnerability, eligibility, and client preference for a range of housing resources. Households are prioritized based on vulnerability and length of time homeless.

**Coordinated Housing Access Team**
- Transition Projects, Urban League, and El Program Hispano Catolico

**Other Coordinated Access for Adults Partner Agencies**

*Note: additional agencies may be added.
DATA MILESTONES – COORDINATED ACCESS FOR ADULTS AND FAMILIES

CLIENTPOINT
- Update existing client record or create new in ServicePoint
- Update or create client household

ADD RELEASE OF INFORMATION
- Transact ROI consent/non-consent.
- If client was created prior to 10/1/2017, unlock the clients' records and add visibility group

RECORD ASSESSMENTS
- Assessment includes:
  o For Adults: VI-SPDAT
  o For Families: Pre-Screen General & Family Size, VI-SPDAT, Family Unit, Addl Points screenings

CREATE REFERRAL
- Create a referral to OR-501: Coordinated Access for Adults or OR-501: Coordinated Access for Families with minor children

CANCEL REFERRAL (if applicable)
- Follow instructions in this handbook to cancel a referral OR follow instructions in relevant program handbook to remove families from the queue and into services.
RELEASE OF INFORMATION (ROI) AND VISIBILITY

Before entering a new client in ServicePoint, always search for the client’s name first. If the client has a record, verify the client’s demographic information before proceeding. For new clients (not yet in ServicePoint), create a new ServicePoint record, create a household that includes all the family members, and follow the steps below to share their record and record their screenings:

Transact the Release of Information (ROI)

1. Click on the ROI tab in the client’s record.

2. Click on the “Add Release of Information” button.

3. Select the appropriate household members (If applicable).

4. Fill in the remaining fields:
   - Provider*: select your agency’s name.
   - Release Granted*: Yes or No
   - Start Date*: Date consent was signed.
   - End Date*: 12 months from Start Date.
   - Documentation: Select the appropriate value from the list.
   - Witness: type words “Coordinated Access”

5. Click the “Save and Release of Information” button.
Unlocking the Client’s Record (IF CLIENT WAS CREATED PRIOR TO 10/1/2017 AND CLIENT SAID “YES”)

1. Unlock the client’s record to the appropriate visibility group.

2. Click on the red padlock in the upper right-hand corner.

3. Click the Add “Visibility Group” button.

4. Search for VG OR-501 Visibility: Coordinated Access

5. Click on the green circle with the plus sign to add the group.

6. Click on the “Exit” button

*Reach out to the contacts on the main page of this handbook for removing visibility.
RECORDING ASSESSMENTS
If the client has an existing screening and their referral date is less than 6 months ago, existing scores can be updated. If previous screening was completed more than 6 months prior, add a new screening. If a client’s Entry/Exits show that they were housed and already exited the program, treat them like a new call and add new screening scores.

Complete the Vulnerability Screening Assessments
After adding a new client, creating the ROI, and opening visibility to the record, complete the Vulnerability Screening Assessments.

1. Go to the Assessments tab.

   For Adults select OR-501: Coordinated Access for Adults from the list. Then click the 'Submit' button.

   For Families with minor children select OR-501: Coordinated Access for Families with minor children. Then click the 'Submit' button.

2. Enter clients demographic information.

   The Families with minor children screening has one additional question.
For Adults:

Please read the section headers to make sure the correct assessment is being used.

1. Answer questions regarding the person’s length of time homeless and disabling condition.

2. Click on the Add button to complete the VI-SPDAT Assessment. Answer all of the questions in the assessment.

3. Click on the Calculate button at the bottom of the VI-SPDAT Assessment to see the Pre-Screen and the Grand Totals.

4. Copy the Pre-Screen Total and click the ‘Save’ button to return back to the screening questions.
5 Answer the remaining “bonus” questions regarding the person’s vulnerability level.

6 Enter the Pre-Screen Total from the VI-SPDAT Assessment into the ‘Enter VI-SPDAT Prescreen Total (0-20)’ box.

7 Add all the points from the “bonus” questions and enter the total into the ‘Enter Additional Point Total (0-6)’ box.

8 Add the points from the ‘Enter VI-SPDAT Prescreen Total (0-20)’ and the ‘Enter Additional Points Total (0-6)’ together and enter the score into the ‘Total Vulnerability Score’ box.
Answer the questions regarding income, including the full monthly income amount. Click on the HUD Verification link to select the appropriate Income Types.

Hint: Select No for “Select the Receiving Income Source? value for all incomplete Source of Income records” to prefill all of the Income Types and then choose Yes for the appropriate type.

Ask about culturally specific services
Answer the health questions below. Please read the questions carefully, based on the person’s answer they may qualify for other services. Click on the HUD Verification link to select the appropriate Health Insurance Types.

**Hint:** Select No for “Select the Receiving Income Source? value for all incomplete Source of Income records” to prefill all of the Income Types and then choose Yes for the appropriate type.

Answer the remaining questions.
Answer the recovery-oriented housing questions below if they are relevant to the person.

If the person answered YES to all three recovery questions, continue with the contact information sections below, click save, and then proceed to the OR-501 Recovery Housing assessment. See Appendix A for instructions on how to submit the OR-501 Recovery Housing assessment.

The below sections are important, they are used for recording the person’s contact information. This section must be answered in order to locate/contact the person when services become available for them. If the person does not have an address or telephone number you can accept a number for a friend, family, business, or etc.

The remaining section is for the person who is completing the assessment. Once you are done answering all the questions, click on the ‘Save’ button.
For Families with minor children

Please read the section headers to make sure the correct assessment is being used.

1. Answer the questions regarding previous living situation, length of time homeless, and disabling condition.

   Note: Do not continue the screening if the person is currently in their own rental. Refer the person to 211 for assistance. If they are not in their own rental, continue the screening.

2. Complete the Pre-Screen General & Family Size, VI-SPDAT, and Family Unit Screenings by clicking on the ‘Add’ button for each.

3. For the VI-SPDAT screening only, click on the ‘Calculate’ button at the bottom of the VI-SPDAT to see the Pre-Screen and the Grand Totals.

   This assessment is to be answered on behalf of everyone in the family. When asking the questions, please frame the question to say “You and your family” (e.g. “Do you or anyone in your family have a disabling condition?”).

4. Copy the Pre-Screen Total and click the Save button to return back to the screening questions.
Answer the remaining “bonus” questions regarding the person’s vulnerability level.

Enter the Scores:

1. Enter the score from the Pre-Screen and General & Family Size assessment into the ‘Enter General Information Total (0-2)’ box.

2. Enter the score from the VI-SPDAT assessment into the ‘Enter VI-SPDAT Prescreen Total (0-20)’ text box.

3. Enter the score from the Family Unit assessment into the ‘Enter Family Unit Total (0-6)’ text box.

4. Calculate the scores from the additional “bonus” questions and enter the total to the ‘Enter Additional Points Total (0-6)’ text box.

Add all the SPDAT scores together and enter the total into the ‘Total Vulnerability Score’ text box. If the total score is less than 6, DO NOT CONTINUE. Scroll down to the bottom of the screen and click the ‘Save’ button. If the score is 6 or more, continue the screening.
Answer the questions regarding income, including the full monthly income amount. Click on the HUD Verification link to select the appropriate Income Types.

**Hint:** Select No for “Select the Receiving Income Source? value for all incomplete Source of Income records” to prefill all of the Income Types and then choose Yes for the appropriate type.

Ask about culturally specific services.
10. Answer the health questions below. Please read the questions carefully, based on the person's answer they may qualify for other services. Click on the HUD Verification link to select the appropriate Health Insurance Types.

Hint: Select No for “Select the Covered? value for all incomplete Health Insurance Type records” to prefill all of the Insurance Types and then choose Yes for the appropriate type.

11. Answer the remaining questions.
Answer the recovery-oriented housing questions below if they are relevant to the person.

If the person answered YES to all three recovery questions, continue with the contact information sections below, click save, and then proceed to the OR-501 Recovery Housing assessment. See Appendix A for instructions on how to submit the OR-501 Recovery Housing assessment.

The below sections are important because they are used for recording the person’s contact information. This section must be answered in order to locate/contact the person when services become available for them. If the person does not have an address or telephone number, you can accept a number for a friend, family, business, or etc.

The remaining section is for the person who is completing the assessment. Once you are done answering all the questions, click on the ‘Save’ button.
CREATE REFERRAL

For all adults assessed using the Coordinated Access for Adults tool (regardless of score), add a referral to the provider **OR-501: Coordinated Access for Adults**.

For families assessed using the Coordinated Access for Families with Minor Children tool, add a referral to the provider **OR-501: Coordinated Families with minor children for the same individual in the household for whom the assessment has been recorded in ServicePoint AND only if the score is 6 or above**.

1. Click on the Service Transactions tab inside the client profile.
2. Click ‘Add Referrals’ box.

- Do NOT include any other household members
- Click on the Service Code ‘Outreach Programs’
- Click the ‘Add Terms’ button.
- Set Provider to **OR-501: Coordinated Families with minor children OR OR-501: Coordinated Access for Adult**
- Click the ‘Add Provider’ button

- Needs Referral Date* and Date of Need* is the date Screenings were completed.
- Click the ‘Save All’ button.
CANCEL REFERRAL

211 and/or program staff may periodically contact families on the queue/BNL to verify that they are still in need of services. When a household cannot be reached or if a household confirms they are no longer homeless, they should be removed from the queue/BNL by canceling the referral.

IMPORTANT: When an adult or family is referred to a service, such as MHT or PSH, there is a separate process for removal from the queue and referral to service. Do NOT use the steps on this page in this scenario.

1. Click on the Service Transactions tab inside the client record.
2. Click ‘Entire Service History’
3. Click the pencil to edit the referral to:
   - OR-501: Coordinated Families with minor children
   - OR-501: Coordinated Access for Adults

4. Set Referral Outcome to ‘Canceled’
5. Record the reason for canceling the referral
6. Change the Need Status to ‘Closed’.
7. Click the ‘Save & Exit’ button.

A successfully canceled referral looks like this:
Appendix A – Entering Recovery Housing Questions

A few housing programs are recovery-oriented, meaning they are alcohol and drug free and support people in their recovery. If these questions are not relevant, you can skip this section. If the person answered YES to the first three recovery questions, continue to the OR-501 Recovery Housing assessment to answer the remaining questions.

To enter the recovery housing questions, select the “OR-501 Recovery Housing Questions” assessment and then click “Submit”.

Answer the questions regarding the person’s substance use and recovery and click “Save” when you are finished.