MULTNOMAH STABILITY INITIATIVE (MSI)

ServicePoint Handbook

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Multnomah County

Questions? Contact the ServicePoint Helpline at 503.970.4408 or servicepoint@multco.us
http://multco.us/servicepoint

Revised 3/27/17

Multnomah Stability Initiative ServicePoint Handbook - Revision History

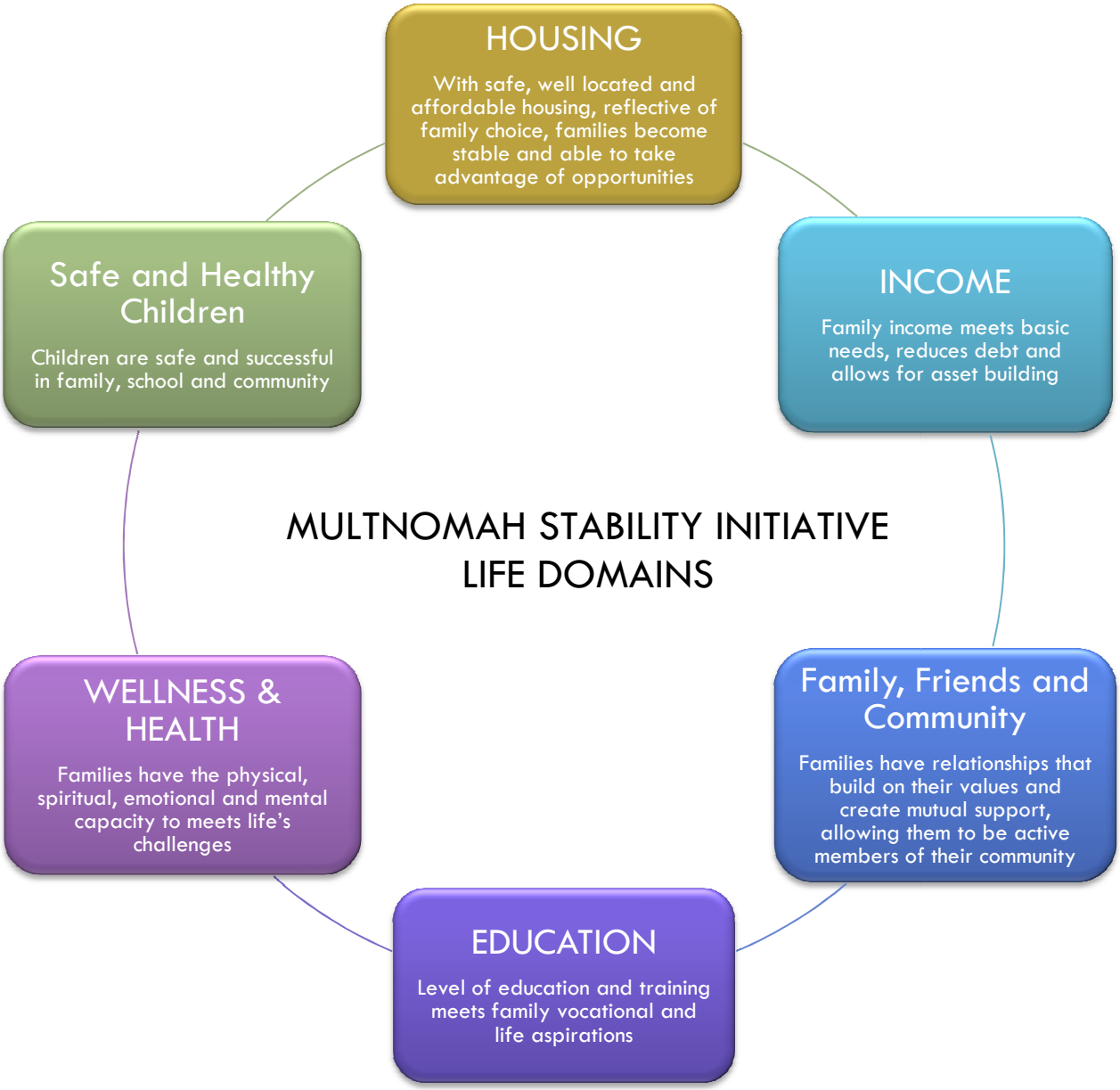
- **Revised 3/27/2017:** Removed MSI Flex Funds from Rent Assistance Service Category pg.6
- **Revised 11/21/16:** Updated ROI instructions on pg. 4 to include adding project ROIs in addition to agency ROI, revised MSI Service Categories on pg. 7
- **Revised 11/4/16:** Added "How to Enter Multiple Services" to Appendix.
- **Revised 10/10/16:** Updated "Gender" description.
- **Revised 8/9/16:** Updated Program Model description; removed Entry question "Is Client Chronically Homeless?"; changed Residence Prior questions at Entry to be required for all adults and not just Head of Household; changed DV question at Entry to be required only for adults and not children.
- **Revised 7/13/16:** Removed Entry question "Was household referred from HFSC" and added "How was household referred to MSI?"
- **Revised 6/29/16:** New work flow for entering MSI Progress Updates and Follow-Ups; added MSI Life Domains Priorities question to program entry assessment; changed employment "hours per month" to "hours per week" on Progress Update; added "School Name" to exit assessment.
- **Revised 3/29/16**: Revised work flow for entering Progress Updates and Follow-Ups
- **Revised 1/19/16:** Revised pg. 6 to add "MSI Flex Funds – Rent Assistance" as service category
- **Original version published Jul 2015**

MULTNOMAH STABILITY INITIATIVE PROGRAM MODEL

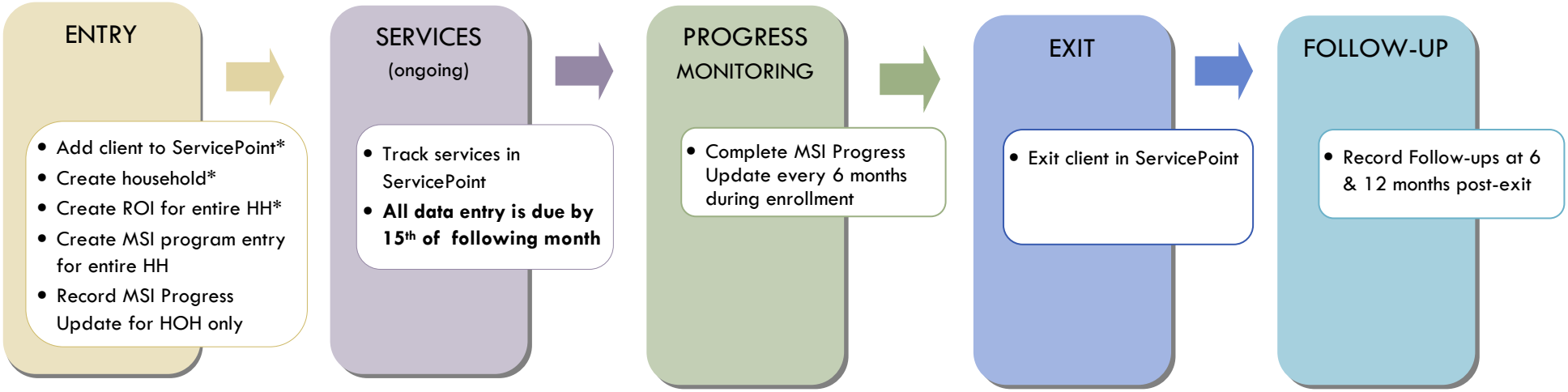
The goal of the Multnomah Stability Initiative (MSI) is to engage households living on low incomes in ways that foster hope, leadership, and community so that they avoid crisis, achieve stability, and access opportunities to reach prosperity. By protecting and building human capital in each family served by MSI, the economic well-being of the entire community is created, grown, and maintained. MSI is an aligned partnership that provides a comprehensive package of services to help households achieve stability and prosperity. MSI partners include:

- Multnomah County Department of County Human Services (DCHS)
- Community-based, contracted partners
- WorkSource Inc. (WSI)
- Oregon Department of Human Services (DHS)

Assertive Engagement (AE) principles guide all MSI system elements. Direct services provided by staff funded by MSI are AE Services. An AE staff person works with each family, offering services and supports at a frequency, location and duration chosen by each family. AE staff provide a direct connection with each family, designed to nurture and foster the household's innate ability to envision and realize a brighter future as they choose from a menu of flexible and aligned services and supports that promote hope, leadership and community.



DATA MILESTONES – MULTNOMAH STABILITY INITIATIVE



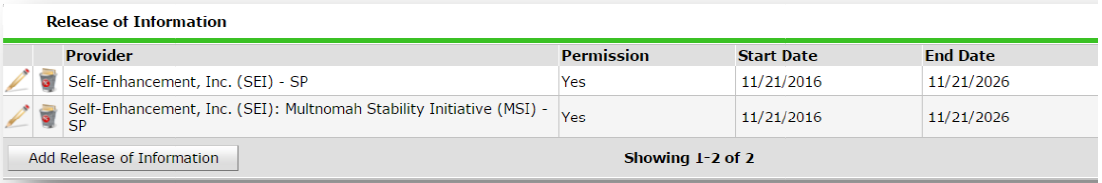
*Instructions for doing these items are not covered in this handbook. Go to our website to download the following materials for these instructions:

- Add client to ServicePoint and Create household
  - ServicePoint New User PowerPoint: https://multco.us/file/14855/download
- Create ROI for entire HH
  - Recording Client Consent to Share and Visibility Settings: https://multco.us/file/43153/download

ENTERING MSI CLIENTS IN SERVICEPOINT

- Create a program entry for the Head of Household by clicking on "Add Entry/Exit" from the Summary or Entry/Exit tabs. Click the check box next to the names of **all household members** to include them in the entry.
- Go into EACH client's entry (adults and children) to enter data.

1. HOUSEHOLD	**Every client needs 1 (and only 1) household**
Household Type	
Head of Household	Only one head of household
Relationship to Head of HH	If client is head of household, this should be 'Self'
HH Date Entered	Same as Program Entry Date
2. ROI	**Required for ALL clients**
Provider	Create one ROI for your AGENCY PROVIDER and one ROI for your MSI PROVIDER

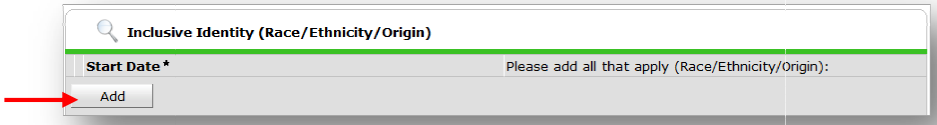
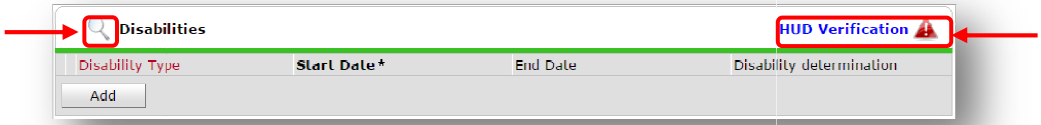


Release of Information

Provider	Permission	Start Date	End Date
Self-Enhancement, Inc. (SEI) - SP	Yes	11/21/2016	11/21/2026
Self-Enhancement, Inc. (SEI): Multnomah Stability Initiative (MSI) - SP	Yes	11/21/2016	11/21/2026

Add Release of Information Showing 1-2 of 2

Release Granted	Choose Yes /No based on the Client Consent to Share form ***Clients only need to sign one "Consent to Share" form *per agency*. If they respond 'Yes,' create a 'Yes' ROI for your agency and 'Yes' ROIs for any project they participate in at your agency.**
Start Date	Date the Consent to Data Sharing form was signed ***If you're creating a new program entry for a client who has already been served by another project at your agency, check for the ROI they already have on file. If they already have a 'Yes' ROI, add a new 'Yes' ROI for PCDS and give it the same start date as their original ROI.**
End Date	10 years after ROI Start Date
Documentation	Select "Signed Consent" - **Verbal consent is not an option for this ROI**
Witness	Enter *Multco*
3. ENTRY	**Without a program entry, clients will not appear in reports**
Type	Always choose 'Basic'
Entry Date	***Defaults to date of data entry – Change to date of program entry (i.e. intake date)**
Section I	**Complete for ALL Household Members**
SUN Service System Contract	Choose relevant contract. Missing or wrong information will impact Outputs and Outcomes.

Relationship to Head of Household	Choose "Self" if head of household. Otherwise, choose appropriate relationship to head of household. One member of the household (and no more than one) must be designated as head of household.
Date of Birth	
Gender	Select best response, open-ended field if responses not applicable.
Inclusive Identity	**Click 'Add' to enter a client's self-identified race/ethnicity. Add all that apply.** 
Primary Language	
Primary Language-Other	Only required if Primary Language is 'Other' - **Do not enter a second language**
Household Size	
Does the client have a disabling condition?	
Disabilities	**If no Disability records exist, click 'HUD Verification' to create a Y/N response for each Disability Type. Otherwise, click the magnifying glass to review and update existing records.** 
Covered by Health Insurance?	
Highest Grade Completed	Do not select *current* grade
Current School Status	
Section II	**Complete for all School-Aged Children Only**
Please indicate which school client is CURRENTLY attending	
Section III	**Complete for ADULTS Only**
Domestic Violence Victim/Survivor?	
Residence Prior to Project Entry	
Residence Prior to Project Entry – Other	Only required if Residence Prior is 'Other'
Length of Stay in Previous Place	
Section IV	**Complete for HEAD OF HOUSEHOLD Only**
How was household referred to MSI?	
MSI Life Domains Priorities	Add one or more life domains to identify which domains the family has chosen to work on through MSI
Zip Code of Last Permanent Address	

ENTERING MSI SERVICES

- Services can be summed by category and entered into ServicePoint on a monthly basis.
- All services should be entered in the Head of Household's record. Check off the names of all household members to include them in the service.

SERVICES	
Start Date	Last day of the service month (if entering monthly)
End Date	Leave blank
Service Type	Leave blank - automatically fills if you select a provider-specific service
Provider Specific Service	Select service (see list below)
Service Staff	Select staff person providing services; contact the ServicePoint Helpline to have the picklist updated if staff is not listed
# of Units	Total # of service hours rounded to nearest 15 minutes (.25 hours) or Exact dollar amount
Unit Type	Select Hours or Dollars

MSI SERVICE CATEGORIES

Services are considered flex funds and should be recorded in dollars. Assertive Engagement is the only service that should be recorded in the form of *hours*.

Assertive Engagement (Hours)
Basic Needs (Dollars) - Includes: food, clothing, household goods, etc.
Childcare (Dollars)
Counseling/Therapy (Dollars)
Education Expenses (Dollars) - Includes: tuition, fees, textbooks, school supplies, tutoring, etc.
Healthcare Expenses (Dollars)
Housing Debt (Dollars) - Includes arrears or other housing-related debts that hinder clients' ability to rent
Housing Placement (Dollars) - Includes deposits, background check fees, application fees, moving costs, etc.
Identification or Other Records (Dollars)
Job Training (Dollars)
Legal Services (Dollars)
Rent Assistance (Dollars) – *NOT* STRA
Other Client Assistance (must specify)
Transportation (Dollars)
Trauma Services (Dollars)
Utilities (Dollars)

For additional information on how to enter MULTIPLE SERVICES, see Appendix A.

ENTERING MSI PROGRESS UPDATES

The MSI Progress Update is recorded for the Head of Household ONLY.
However, responses should reflect the entire household.

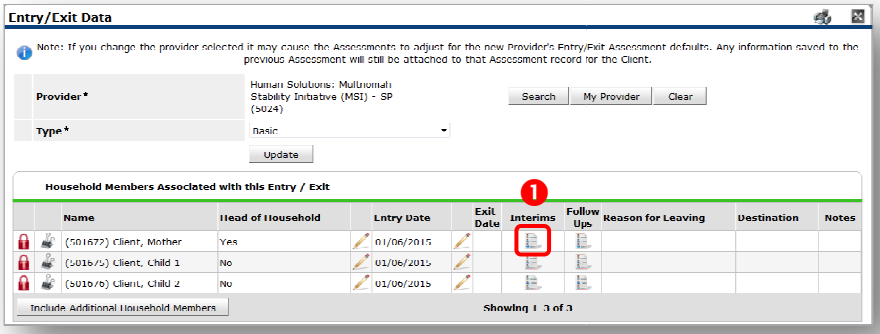
- MSI Progress Updates are due at entry (within 60 days), every 6 months during enrollment, at exit and at 6 & 12 mo. follow-ups.

MSI Progress Update Interval	Where do I record the Progress Update in SP?
Entry (within 60 days) and every 6 months during enrollment (i.e. Entry, 6-month, 12-month, 18-month, 24-month)	Use the "Interims" icon and add a new interim review EACH time (see below)
Exit	When exiting the household from MSI, the Progress Update will be found on the Exit assessment (see pg. 11)
Follow-Ups (6 and 12 month)	Use the "Follow Ups" icon and add a new follow-up EACH time (see pg. 12)

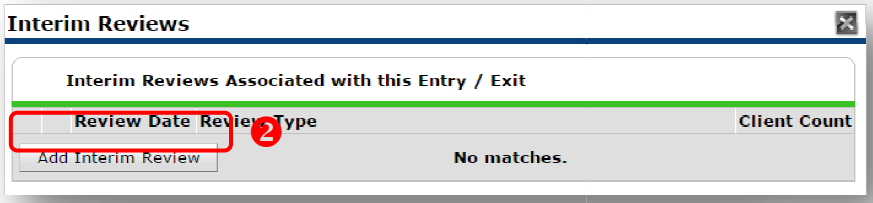
Entering Progress Updates at entry and every 6 months during enrollment

Follow the steps below **EACH time** to record progress updates at entry (within 60 days) and every 6 months during enrollment in the MSI program.

❶ At the top of the Program Entry screen, click the **Interims** icon associated with the Head of Household



❷ In the next window that appears, click 'Add Interim Review'

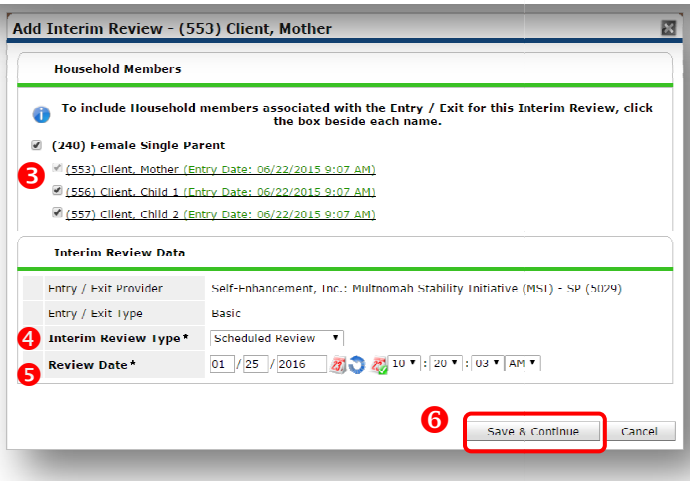


❸ Leave all household members' names checked

❹ **Set <u>Interim Review Type</u> to 'Scheduled Review'**

❺ **<u>Review Date</u> = Date Progress Update was completed (this is not necessarily the same as the date you are entering the data into ServicePoint)**

❻ Click Save & Continue



DSCP_MSI_Progress Update Interim Review Date: 01/03/2016 03:05:06 PM

The MSI Progress Update needs to be recorded for the Head of Household ONLY, but responses should reflect the entire household.

Choose MSI Progress Update Interval: -Select- (-Select-, Entry, 6-Month, 12-Month, 18-Month, 24-Month, 30-Month, 36-Month)

Monthly Household Income

:lick "Add" to record ALL ja adult household members that contribute o household income.

MSI Household Employment

Start Date *	Job Title	Average Hours Worked Per Week	Hourly Wage

Add

Is client eligible for CSBG? -Select-

Is Household Receiving TANF? -Select-

Current savings

Total Monthly Expenses

Monthly Housing Cost

Is family engaged with WorkSource? -Select-

Is family engaged with any other job training program? -Select-

If yes to other job training program, click "add" below to record each type.

MSI Household Job Training

Start Date *	Job Training Category

Add

Do all household members receive health services appropriate to their needs? -Select-

Do all household members receive dental services appropriate to their needs? -Select-

Rate family's agreement with the statements below:

My family's current housing situation meets our needs for size. health, safety, and location. -Select-

My current level of household income meets my family's needs for expenses and savings. -Select-

My family has relationships or social networks that provide positive supports to each other. -Select-

My family has relationships or social networks that reinforce our culture and values. -Select-

My family's overall education or job training meets our vocational and life aspirations. -Select-

In the last three months, my family had enough resources for food, and no one in our family had to reduce the size of their meals or skip meals. -Select-

All family members feel safe in our home. -Select-

My children are able to be safe and successful in their family, school, and community. -Select-

Save | Save & Exit | Exit

MSI Progress Update

- **Choose the appropriate MSI Progress Update Interval each time.**
- Update responses to all questions
- Click 'Save & Exit' to finish

The MSI Progress Update will pre-fill with the most recent responses. Go through and update all of the responses that have changed as of the time of the Update Interval. The Update is a snapshot in time and should be accurate as of the Review Date (#5 on pg. 7), or the Exit and Follow-up dates if that is when you are updating the Progress Update. You do not need to capture anything that may have been true in between update intervals but is no longer true as of the Review Date.

MSI Household Employment

Start Date * 01 / 25 / 2016

Job Title

Industry -Select-

Other Industry (specify)

Average Hours Worked Per Week

Hourly Wage

End Date

Save | Save and Add Another | Cancel

Instructions for recording Household Employment and Job Training can be found on pgs 9-10.

MSI Household Job Training

Start Date * 01 / 25 / 2016

Job Training Category -Select-

Other Job Training (specify)

End Date

Save | Save and Add Another | Cancel

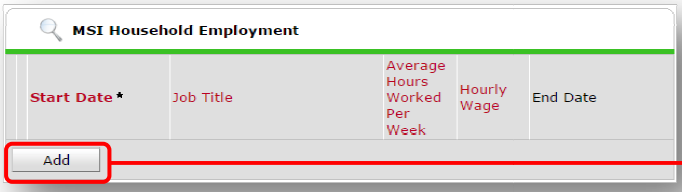
Household Employment and Job Training

ENTERING NEW EMPLOYMENT AND JOB TRAINING INFORMATION

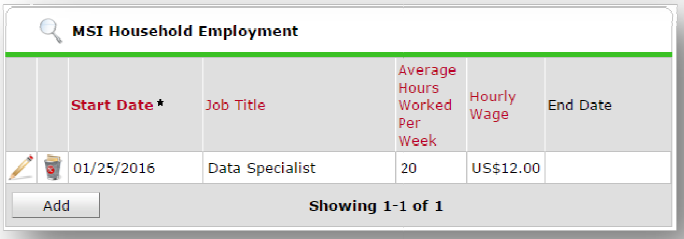
- If any ADULT in the household is employed, enter the information in the MSI Household Employment section.
- If any ADULT in the household is participating in job training other than WorkSource, enter the information in the MSI Household Job Training section.

Household Employment

SCENARIO: At the Entry progress update interval, there is one adult in the household that is employed as a Data Specialist with a $12/hr wage and working an average of 20 hours a week.

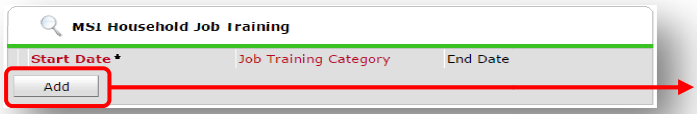


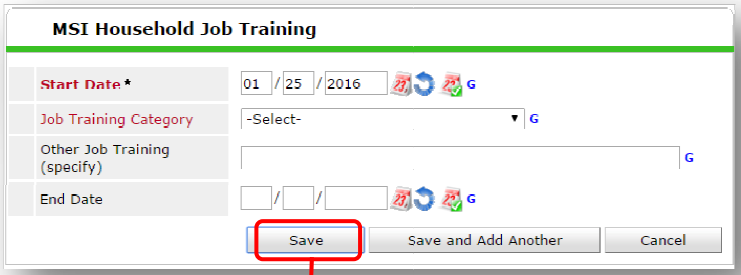
- Click "Add"
- Leave the **Start Date** as the default
- Complete the rest of the items in red on the form.
- Leave the **End Date** blank.
- Click "Save" or "Save and Add Another" if you have more than one job to enter.



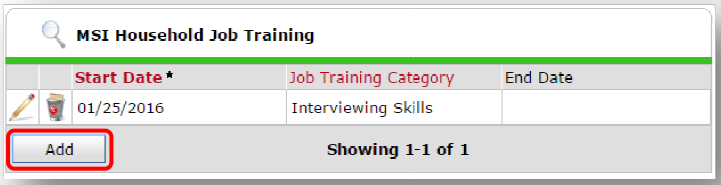
Household Job Training

SCENARIO: At the Entry progress update interval, there is one adult in the household that is taking a class on "Interviewing Skills."





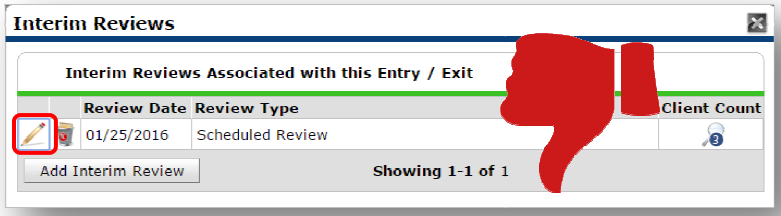
- Click "Add"
- Leave the **Start Date** as the default
- Complete the rest of the items in red on the form.
- Leave the **End Date** blank.
- Click "Save" or "Save and Add Another" if you have more than one job training category to enter.



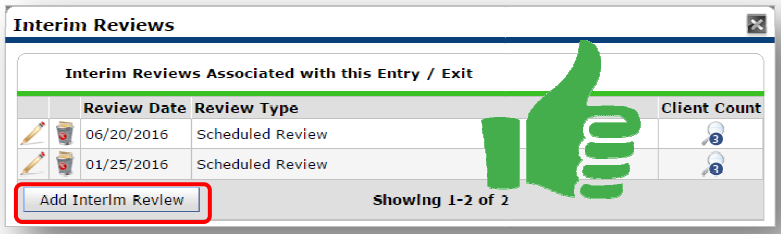
UPDATING EMPLOYMENT AND JOB TRAINING INFORMATION AT 6 MONTH INTERVALS

Because the MSI Progress Update pre-fills with the most recent responses, your role when completing a Progress Update at every 6 month interval is to update any information that has changed.

Do NOT pencil in to an existing Interim Review.

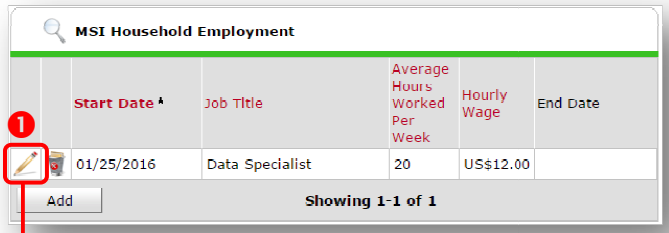


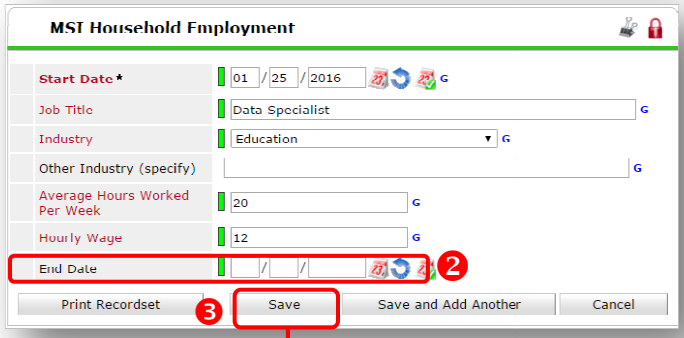
Instead, follow the instructions on pg. 7 to ADD another interim review EACH time.

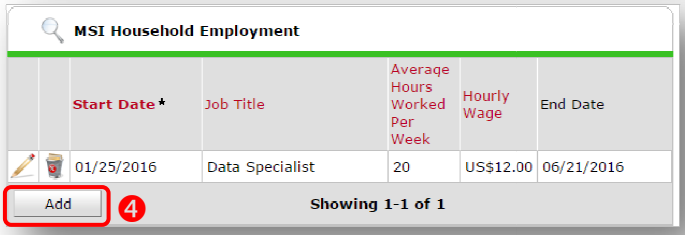


Do NOT add interim reviews for updates done at **Exit** and **Follow-Ups**. When updating information at Exit, do it in the Exit assessment (pg. 11). When updating information at Follow-Ups, do it through the "Follow Ups" icon (pg. 12).

Once you've created a new interim review and are in the MSI Progress Update, follow the steps below to update employment and job training information. The example is for employment, but the same instructions apply for updating job training information.







IMPORTANT: Do NOT update the existing record when there are changes. End date it and create a new record with the updated information.

❶ Pencil in to the record in the MSI Progress Update that has had any changes since the last update (e.g. loss of job, changes in hours, wage).

❷ Fill in the **End Date**. The End Date = the day before the Review/Exit/Follow-Up date

- Ex 1: if you are updating the record at the 12-Month interval and the 12-Month Interim Review Date is 1/2/2016, the End Date would be 1/1/2016.
- Ex 2: if you are updating the record at Exit and the Exit Date is 2/2/2016, the End Date would be 2/1/2016.

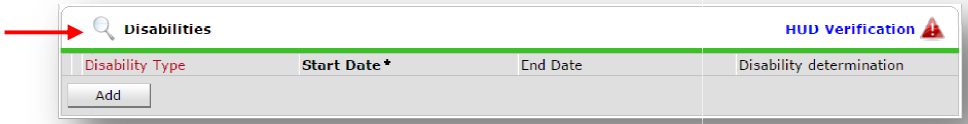
❸ Click "Save"

❹ Follow the instructions on pg. 9 to enter a new record with the updated employment information.

EXITING MSI HOUSEHOLDS IN SERVICEPOINT

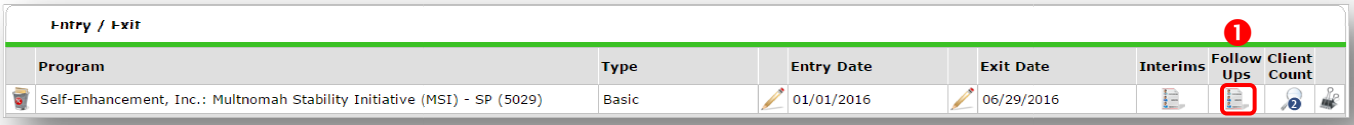
- Answers in the Program Entry will carry over into the Program Exit. Be sure to update any responses that have changed.
- If receiving short-term rent assistance (STRA), households should remain open in MSI until STRA subsidies end.
- Set STRA follow-up due dates at 3, 6 & 12 mo. intervals as directed by Home Forward. STRA follow-ups should be based on the end of STRA subsidy, not the MSI Exit Date.

EXIT

Section I	**Complete for ALL Household Members**
Current School Status at Exit	Required for all household members
Highest Grade Completed at Exit	Required for school-age clients only
Covered by Health Insurance?	
Does the client have a disabling condition?	
Disabilities	**Click the magnifying glass to check that responses are still accurate** 
Section II	**Complete for all School-Aged Children Only**
Please indicate which school client is CURRENTLY attending at Exit	
Section III	**Complete for Head of Household ONLY**
Was household screened for benefits eligibility and referred as appropriate?	
Section IV	**Complete for Head of Household ONLY**
MSI Progress Update	The MSI Progress Update is integrated into the Exit assessment and will be pre-filled with the most recent responses. Be sure to update the responses to reflect any changes at exit. Instructions are on pgs. 8-10.

RECORDING MSI FOLLOW-UPS IN SERVICEPOINT

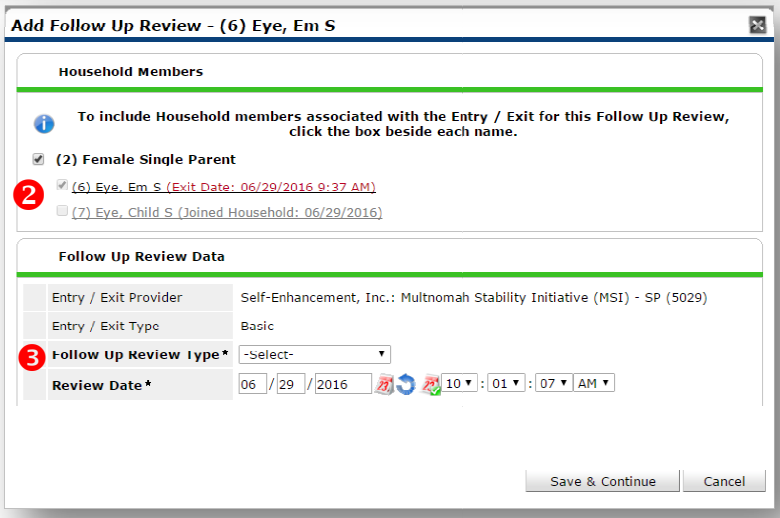
- MSI follow-ups are due for **ALL HOUSEHOLDS** (regardless of housing status at exit) enrolled in MSI for 90 days or more (3 months).
- Follow-ups are due at 6 and 12 months post-exit, based on the MSI exit date.
- Record follow-ups under the Head of Household ONLY.



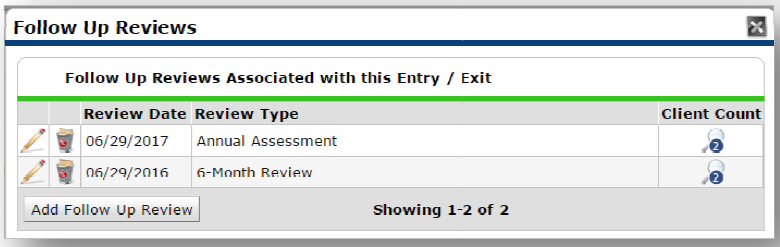
❶ Click on the Follow Ups icon associated with the program entry under the "Entry/Exit" tab. Then, click on "Add Follow Up Review."

❷ Make sure all members of the household are checked.

❸ Choose the appropriate "Follow Up Review Type." The two you will be using are "6-Month Review" and "Annual Assessment." Click "Save & Continue."



It should look like this when you click on the Follow Ups icon after you have recorded the 6-Month and 12-Month Follow-Ups



Record follow-ups under the Head of Household ONLY

Follow Up	
Follow Up Status	Choose one. If "Attempted, Unable to Contact Client" or "Client re-entered - New Entry/Exit," skip the rest and click "Save & Exit." If "Other Verifiable Source Contacted," choose appropriate response for "Is Client Still in Housing?" and then skip the rest and click "Save & Exit."
Is Client Still in Housing?	
MSI Progress Update	The MSI Progress Update will be pre-filled with the most recent responses. Be sure to update the responses to reflect any changes at the follow-up interval. Instructions are on pgs. 8-10.

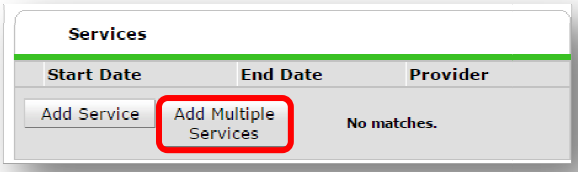
Appendix

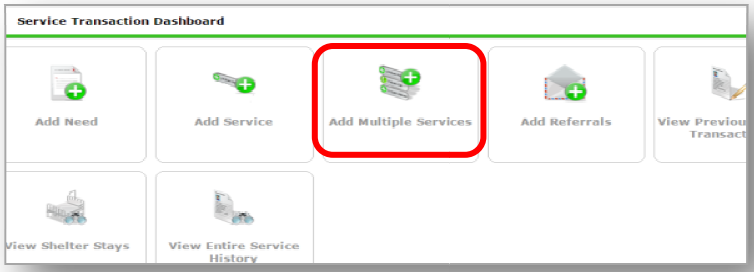
ENTERING MULTIPLE SERVICES

Use the steps below to record *multiple* services to a client/household at the same time

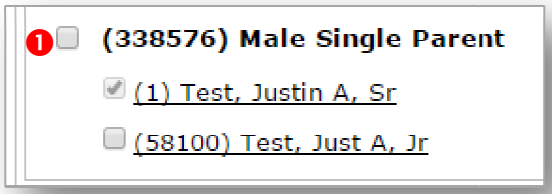
The 'Add Multiple Services' icon can be found in two locations:

On the **Client Information-Summary** tab or In the **Service Transaction** tab menu





❶ Check off any family members you want to include in the service transaction. **Services will be applied to all family members that are checked off.**



❷ Enter the **number** of services you'd like to generate in **both** places (this will typically be 1)

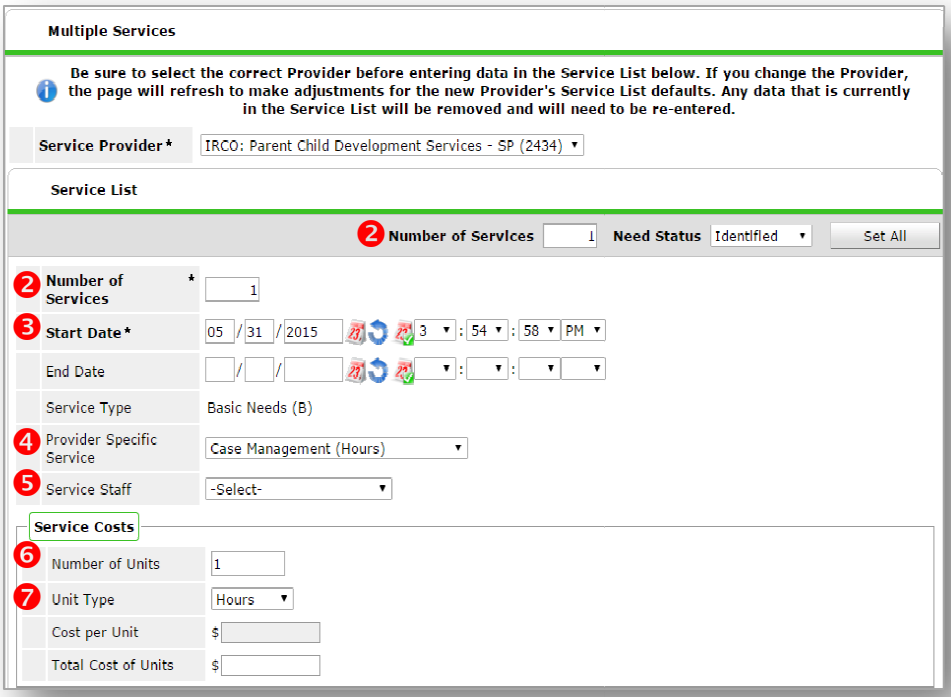
❸ Set Start Date as the last day of the month that the services took place

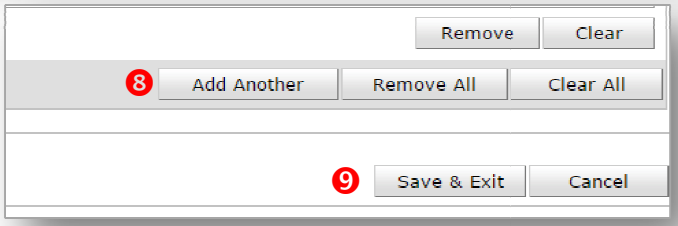
❹ Choose Provider Specific Service

❺ Choose Service Staff

❻ Enter the Number of Units rounding to nearest 15 minutes (.25 hours)

❼ Enter the Unit Type



❽ At the bottom of the screen, click 'Add Another' to add a different type services to this client's profile.

❾ Click 'Save & Exit' to finish