BIENESTAR DE LA FAMILIA
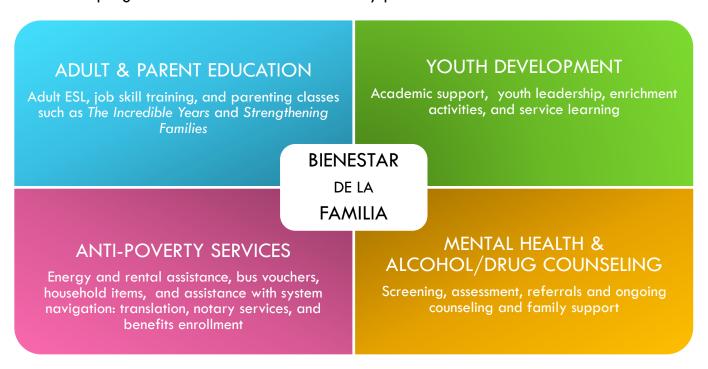## ServicePoint Handbook

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Multnomah County

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

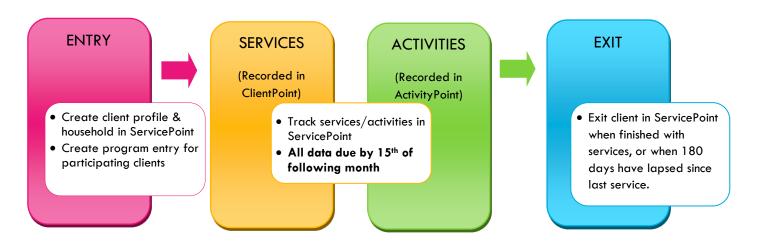Updated: 08.02.18 Removed language regarding ROIs.
Updated: 10.10.18 Included instructions for exiting clients. Removed outdated statistics from program model.

BIENESTAR DE LA FAMILIA PROGRAM MODEL

Bienestar de La Familia was established to serve the Latino community in Multnomah County. Today, staff also work with the Somali community, other immigrant and refugee families, and other residents in the Cully neighborhood. The team offers mental health and addiction services, case management, afterschool programs for teens and hosts a monthly produce distribution.

ADULT & PARENT EDUCATION
Adult ESL, job skill training, and parenting classes such as *The Incredible Years* and *Strengthening Families*

YOUTH DEVELOPMENT
Academic support, youth leadership, enrichment activities, and service learning

BIENESTAR DE LA FAMILIA

ANTI-POVERTY SERVICES
Energy and rental assistance, bus vouchers, household items, and assistance with system navigation: translation, notary services, and benefits enrollment

MENTAL HEALTH & ALCOHOL/DRUG COUNSELING
Screening, assessment, referrals and ongoing counseling and family support

DATA MILESTONES – BIENESTAR DE LA FAMILIA

ENTRY
- Create client profile & household in ServicePoint
- Create program entry for participating clients

SERVICES
(Recorded in ClientPoint)
- Track services/activities in ServicePoint
- **All data due by 15th of following month**

ACTIVITIES
(Recorded in ActivityPoint)

EXIT
- Exit client in ServicePoint when finished with services, or when 180 days have lapsed since last service.

ENTERING A BIENESTAR CLIENT IN SERVICEPOINT

- Each client who participates in services and/or activities must have a program entry.
- Click check box next to HH members' names to include in an entry. **Include all family members who will be receiving services and/or participating in activities.**

1. HOUSEHOLD	Every Client Needs 1 (and only 1) Household
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	Required if entering client into ServicePoint for first time Same as Program Entry Date

2. ENTRY	
Provider	Will default to the correct provider - 'Bienestar de la Familia'
Entry Type	Always choose 'Basic'
Entry Date	Date of program entry *Defaults to date of data entry - Remember to change*
Section I	**Complete for All Clients**
Date of Birth	
Gender	
Inclusive Identity	**Click 'Add' to enter a client's self-identified race/ethnicity. Add as many as apply.**
Primary Language	
Primary Language-Other	Only required if Primary Language is 'Other' - **Do not enter a 2nd language**
Zip Code of Last Perm Addr.	Zip code of last residence where client stayed for 90+ days

RECORDING BIENESTAR SERVICE TRANSACTIONS IN SERVICEPOINT

- Services can be entered as you go or summed by category and entered as of the last day of the service month.
- Check off names of all household members who participated in (or benefitted from) the service.
- Services entered in ServicePoint must match client case files in terms of service month, service type, and hours/dollars.

SERVICES

Start Date	Last day of the month in which services were provided (if entering data monthly)
End Date	Leave blank
Provider Specific Service Type	Select service (see definitions on following page)
Service Staff	Select staff person providing services; contact the helpline to update the list if necessary
Service Notes	For 'Client Assistance' (flex funds) include a note describing what the purchase was
Number of Units	Total # of service hours rounded to nearest 15 minutes (.25 hours) *or* Exact $ amount of flex funds (for 'Client Assistance')

BIENESTAR SERVICE DEFINITIONS

Anti-Poverty/Basic Needs (unit type = hours) - Direct services and/or referrals related to aiding families in avoiding crisis, achieving stability and meeting the basic needs of their household. Examples include:
- Rent assistance referrals
- Energy assistance referrals: OEAP, LIHEAP, OTAP, etc.
- Connecting clients to benefits such as TANF, SNAP, WIC, health insurance/OHP, SSI, SSDI, Section 8, etc.
- Connecting families to general household goods: clothing, school supplies, furniture, holiday resources, etc.
- Linkage to food resources: emergency food boxes, food pantries, Harvest Share, etc. (*Does not include* Mercado - track that as a non-enrolled event in ActivityPoint)
- Financial strategies: budgeting, debt management, tax services, referral to financial planning services, etc.

Client Assistance (unit type = dollars) - Use of flex funds to provide clients with services and goods meant to assist family self-sufficiency. Examples of 'Client Assistance' purchases include but are not limited to healthy food, clothing, household items, vehicle repairs, bus tickets, school supplies, employment-related items, identification papers, health/dental/vision/mental health care expenses not covered by insurance, etc. Any use of client assistance flex funds must be documented in client case files according to County procedures. Under no circumstances should a client receive cash.

Domestic Violence Services (unit type = hours) - Direct services and/or referrals for issues of familial violence, including help filing police reports, restraining orders, and referrals to domestic violence shelters, support groups, or counseling services. *Does not include*: DV support groups offered at Bienestar de la Familia - track those as enrolled activities in ActivityPoint.

Education & Employment Services (unit type = hours) - Direct services and/or referrals related to educational, vocational, and employment opportunities for youth and adults. Examples include:

- Helping clients navigate school/student issues
- Referrals to educational/enrichment opportunities such as seasonal or afterschool activities, mentoring, pre-school programs such as HeadStart or Portland Niños, youth internships, etc.
- Assistance with scholarship and financial aid applications
- Assistance accessing vocational training opportunities
- Assistance with job-readiness skills: job searching, resume writing, interviewing, employment programs, etc.
- ***Does not include:*** academic or enrichment groups offered at Bienestar de la Familia - track those as enrolled activities in ActivityPoint.

Health & Wellness Services (unit type = hours) - Direct services and/or referrals to help clients access health services including: referrals to low-cost health clinics, eye health programs, dental van or other dental resources, pre-natal care referrals, referrals to wellness programs/activities, assistance scheduling medical appointments, or planning healthy family recreation. ***Does not include:*** participation in health/nutrition/fitness groups offered at Bienestar de la Familia - track those as enrolled activities in ActivityPoint.

Legal Advocacy Services (unit type = hours) - Direct services, referrals, and/or system navigation support for criminal, civil, immigration, or family law matters (divorce, child support, custody). Examples include:

- Housing advocacy: assistance with eviction notices, tenant/landlord mediation, etc.
- Legal support: notary services, mediation services, finding and communicating with attorneys, working with youth in the juvenile justice system, etc.
- Assistance with legal documents/proceedings: police reports, wage garnishments, court subpoenas, Powers of Attorney, etc.

Parenting Services (unit type = hours) - Direct services and/or referrals that address parenting needs. Examples include parent coaching, linkage to affordable childcare, or referrals to external community parent groups. ***Does not include:*** participation in parenting groups offered at Bienestar de la Familia (e.g. *Incredible Years* or *Strengthening Families*) - track those as enrolled activities in ActivityPoint.

EXITING BIENESTAR CLIENTS FROM SERVICEPOINT

- A client should be exited from Bienestar when they have completed the program or no longer need services.
- If a client stops coming to groups and appointments, leave them open in ServicePoint for 180 days in case they resume services. If they **do not return after 180 days, exit them.**
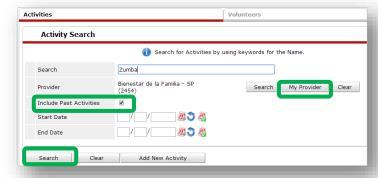- If the same client returns after being exited, create a new program entry by clicking 'Add Entry/Exit.'

EXIT	
Exit Date	***Defaults to date of data entry***
Reason for Leaving	Select from drop down list. If you are closing a client that is no longer active (over 180 days with no services), select "Other"
Destination	Select from the drop down list. If Reason for Leaving is "Other**",** select "No Exit Interview Completed".
Save and Continue	

CREATING ACTIVITIES IN ACTIVITYPOINT

- **Enrolled Activities** are groups that meet regularly with consistent attendees (e.g. *The Incredible Years*, *Sí Se Puede*, *Strengthening Families*, etc.)
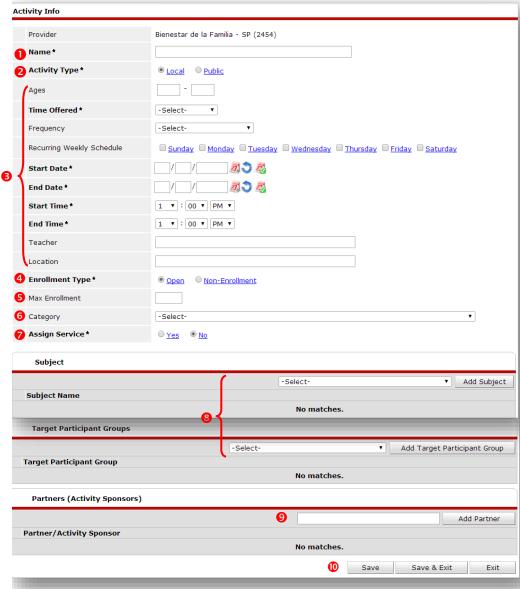- All clients attending Enrolled Activities must have a Bienestar program entry
- **Non-enrolled Activities** are open events where you only want to track the total number of attendees (e.g. Mercado, holiday events, etc.)
- **Before creating a new activity, always search for the activity name.** Click 'My Provider' to search only within your own program. Click 'Include Past Activities' if the activity has ended.

Activities		Volunteers	
Activity Search			
	ⓘ Search for Activities by using keywords for the Name.		
Search	Zumba		
Provider	Bienestar de la Familia - SP (2454)	Search	My Provider	Clear
Include Past Activities	☑		
Start Date	__/__/__		
End Date	__/__/__		
Search	Clear	Add New Activity	

Enrolled Activities:

❶ Create an activity name that will be easy to search for later, ex: '2014-15 Zumba' or 'Summer 2015 Adult ESL'

❷ *Activity Type* is always 'Local'

❸ Set all activity parameters

❹ For enrolled activities, leave *Enrollment Type* as 'Open'

❺ Set Max enrollment

❻ Choose the most appropriate category. Only select from the options that begin with 'SUN.'

❼ Always leave *Assign Service* as 'No'

❽ Select the appropriate *Subject* and *Target Participant Group* and click 'Add.' Only select from the options that begin with 'SUN.'
Add all that apply.

❾ If applicable, write in any activity partners and click 'Add.' Add as many as apply.

❿ Click 'Save' then continue on to the 'Sessions' tab (see instructions on following page)

Activity Info

Provider	Bienestar de la Familia - SP (2454)
❶ **Name ***	
❷ **Activity Type ***	⦿ Local ○ Public
Ages	__ - __
Time Offered *	-Select- ▼
Frequency	-Select- ▼
Recurring Weekly Schedule	☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
Start Date *	__/__/__
End Date *	__/__/__
Start Time *	1 ▼ : 00 ▼ PM ▼
End Time *	1 ▼ : 00 ▼ PM ▼
Teacher	
Location	
❹ **Enrollment Type ***	⦿ Open ○ Non-Enrollment
❺ Max Enrollment	
❻ Category	-Select- ▼
❼ **Assign Service ***	○ Yes ⦿ No

Subject

	-Select- ▼	Add Subject
Subject Name		
	No matches.	

❽

Target Participant Groups

	-Select- ▼	Add Target Participant Group
Target Participant Group		
	No matches.	

Partners (Activity Sponsors)

❾

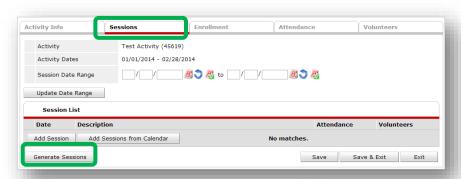|		Add Partner
Partner/Activity Sponsor		
	No matches.	

❿ Save | Save & Exit | Exit

Copying an Activity

After setting up an activity and clicking 'Save,' you have the option to create another activity with the same activity parameters by clicking 'Copy Activity.'

Be sure to give the newly generated activity a different name and re-enter the date range before saving.

Creating Sessions for Enrolled Activities:

❶ Click on the Sessions tab in the activity

❷ Click 'Generate Sessions' and a full list of session dates will appear based on the date range and days you selected in the Activity Info tab. To add individual session dates, click 'Add Sessions from Calendar' and click only the days you want.

❸ To delete unwanted sessions, click the garbage can next to that session date.

Enrolling Clients in an Activity:

❶ Click on the Enrollment tab in the activity

❷ Click 'Add New Participant'

❸ Search for clients by name. Clients will only appear if they have a profile in ClientPoint.

❹ Check off the name of the client you would like to enroll and click 'Submit'

❺ Set the 'Enrollment Date' as the first day that the client attended the activity and click 'Continue'
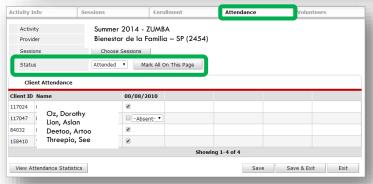
❻ Repeat for all clients enrolled in that activity

Entering Attendance in ActivityPoint:

❶ In ActivityPoint, search for the class title you want to enter attendance for. Click 'My Provider' to search only within your own program. Click 'Include Past Activities' if the activity has ended already.

❷ Once inside the activity, go to the Attendance tab and click 'Choose Sessions.' You can enter attendance for up to 5 sessions at once.

❸ **TIP: Change Status to 'Attended' and click 'Mark All on this Page,' then uncheck any absent participants**

Creating Non-enrollment Activities in ActivityPoint:

❶ Follow the same steps as creating an enrolled activity, except for Enrollment Type, click 'Non-enrollment'

❷ Create session following the same steps as for an enrolled activity

❸ To record attendance, go to the Attendance tab and click the pencil next to the session date.

❹ Enter the total youth and adult participants, as well as race/ethnicity (if known)

❺ Click 'Save' to exit