COORDINATED HOUSING ASSESSMENT TEAM (CHAT)

ServicePoint Handbook

Contents

Multnomah County

Questions? Contact servicepoint@multco.us

COORDINATED HOUSING ASSESSMENT TEAM (CHAT) SERVICEPOINT HANDBOOK REVISION HISTORY

- Published October 2021

CHAT PROGRAM MODEL

Intensive street outreach to move those with the highest barriers to services, into housing. Focus is on helping client prepare documents necessary to obtain housing, and maintaining contact with client during housing search.

DATA MILESTONES – CHAT

ENTRY

- Add client to ServicePoint*
- Create ROI
- Answer 3 questions on the Client Profile tab
- Create CHAT program entry
- Add Case Manager to profile

SERVICES / DOCUMENT READINESS

- Services data entry is due within 10 days of services given
- Documents can be recorded and uploaded through the Assessments tab

EXIT

- Exit client in ServicePoint

ENTRY INTO CHAT

- After clients sign a *Coordinated Access Release of Information*, add agency AND CHAT level ROIs to each client's ServicePoint profile. Instructions can be found at: https://multco.us/servicepoint/manualsguides
- Create a program entry for the Head of Household.

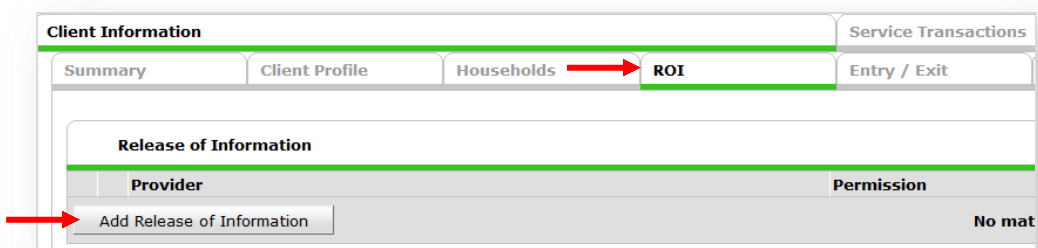
1. BUILD/UPDATE HOUSEHOLD – if more than one person in household; if one person, SKIP this step

Household Type	
Head of Household	Only one person should be designated as head of household
Relationship to Head of HH	If client is head of household, this should be 'Self'
HH Date Entered	

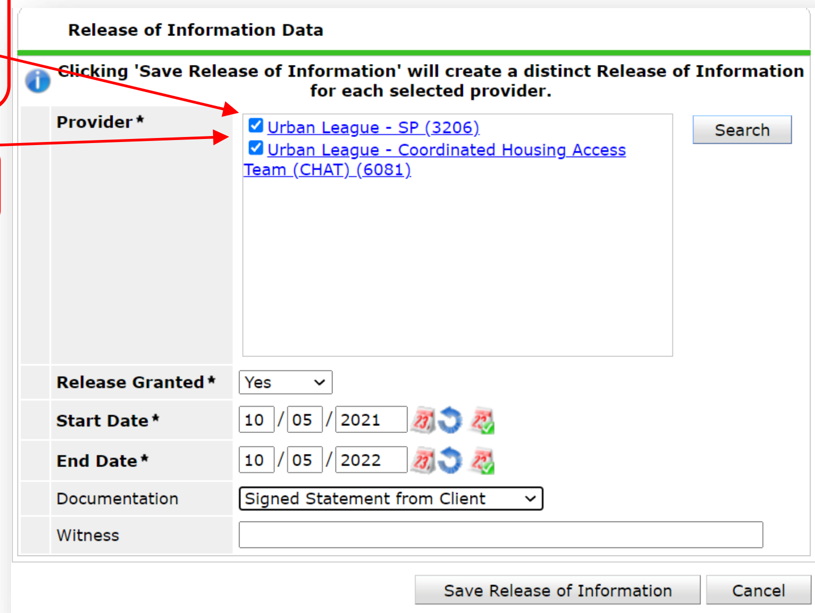
2. TRANSACT ROI **Required for ALL Household Members included in Program Entry**

After clients sign a *Coordinated Access Release of Information* form, transact Parent and SO level ROI to all household members.

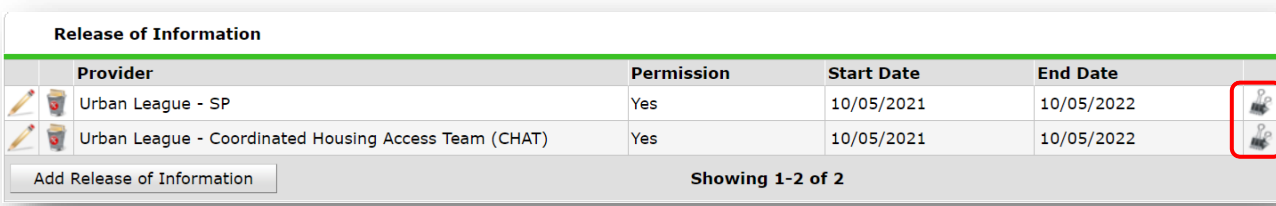
- Download Client Consent forms here: http://ahomeforeveryone.net/coordinatedaccess
- View a Video on How to Transact an ROI here: https://www.youtube.com/watch?v=A6YYacA-sd4

Transact ROI under Head of Household	In the client profile of the Head of Household, click on the "ROI" tab. Then, click on "Add Release of Information." 

Provider	Click 'Search' to select your PARENT provider (also known as your Login provider) AND your CHAT provider
Release Granted	Choose Yes or No based on the Client Consent to Share form
Start Date	Date the Client Consent to Share form was signed
End Date	1 year after Start Date
Documentation	Select Signed Statement from Client or Verbal consent
Witness	Skip



When successfully transacted, it should look like this under the ROI tab. You may choose to attach the signed Client Consent to Share form by clicking on the image of the binder clip (optional).



* Email or call the ServicePoint Helpline if you see there are other ROIs transacted for the household already and you are unsure what to do: 503-970-4408 or servicepoint@multco.us

3. CLIENT PROFILE

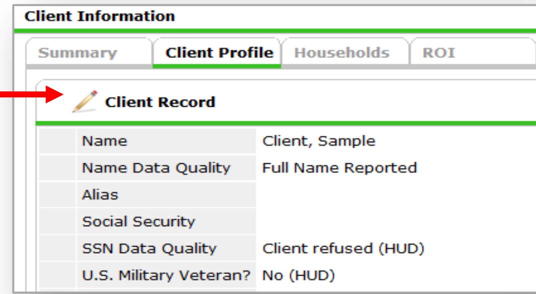
Every Client must have 3 questions answered in the Client Profile Tab

Name Data Quality

SSN Data Quality - always answer '**Client Refused**' (unless SSN is required for a particular project)

U.S. Military Veteran?

Click the pencil to answer the 3 profile questions



4. ADD PROGRAM ENTRY

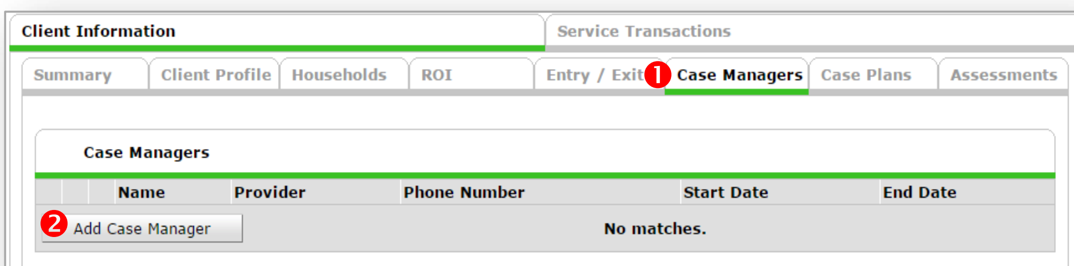
Entry Provider	Choose your CHAT provider
Entry Type	Always choose 'Basic'
Entry Date	Defaults to data entry date - **Change to date of intake**

THERE ARE NO ENTRY QUESTIONS FOR CHAT

5. ADD CASE MANAGER

❶ Click on the Case Manager tab in client's profile

❷ Click 'Add Case Manager'

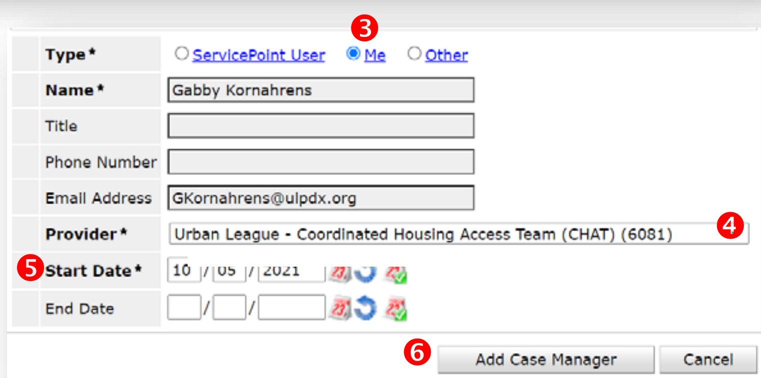


❸ Click the 'Me' option to set yourself as the Case Manager

❹ Choose your agency's **CHAT** Provider

❺ Start Date should be the date you started working with the client.

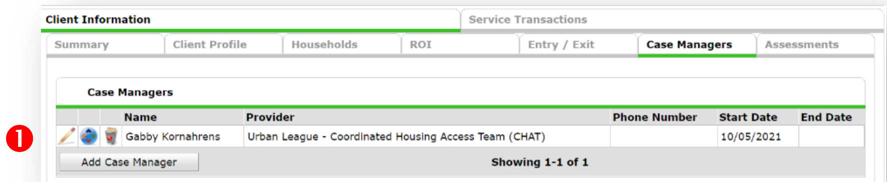
❻ Click 'Add Case Manager'



CHANGING A CASE MANAGER

DO NOT remove Case Managers from other programs/agencies. Edits should only be made to CHAT Case Managers within your agency.

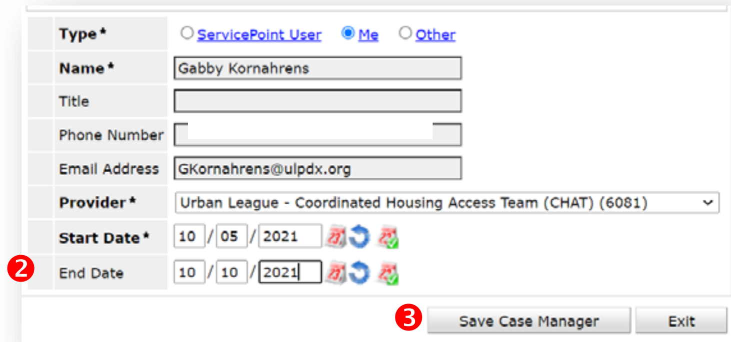
❶ Click on the pencil next to the name of the former Case Manager



❷ Set the End Date to <u>*the day before*</u> you started working with the client

❸ Click 'Save Case Manager'

❹ Follow the steps above to add yourself as the new Case Manager



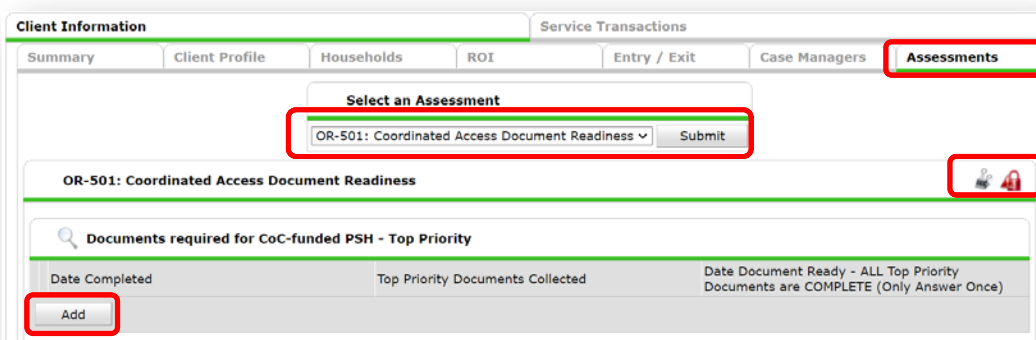
ENTERING CHAT SERVICE TRANSACTIONS IN SERVICEPOINT

- Enter a service transaction each time you help a client obtain documents
- Upload documents through the Assessments tab

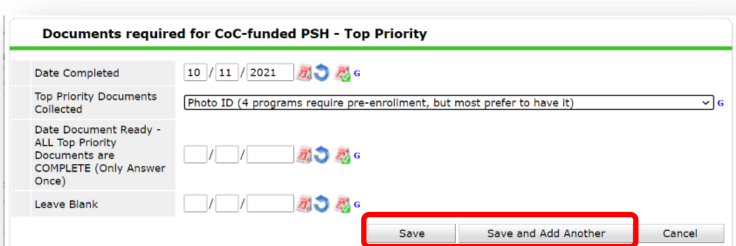
SERVICES	
Start Date	Day of service
End Date	Day of service; same as the Start Date
Service Type	Select Certificates/Forms Assistance
Provider Specific Service	Select General Forms Assistance
Service Notes	Add note about the service provided (optional)
Need Status	It will be set to “Identified”; change to “CLOSED”
Outcome of Need	Choose “Fully Met”

UPLOADING DOCUMENTS IN SERVICEPOINT

- Upload documents through the Assessments tab
- Choose OR-501: Coordinated Access Document Readiness assessment, then click the Submit button
- Click the binder clip icon to begin the document upload process
- Click Add in the CoC-funded PSH Top Priority box to record the document type information



Choose the document; Click Save to exit, or Save and Add Another to record information on additional documents



EXIT FROM CHAT

- After exiting clients from CHAT, if they come back within 3 months – delete exit date and add new services. If the client comes back after 3 months or longer from program exit, create new program entry.

EXIT
Exit Date
Reason for Leaving
Destination