

COORDINATED HOUSING ASSESSMENT TEAM (CHAT)

ServicePoint Handbook

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Questions? Contact servicepoint@multco.us

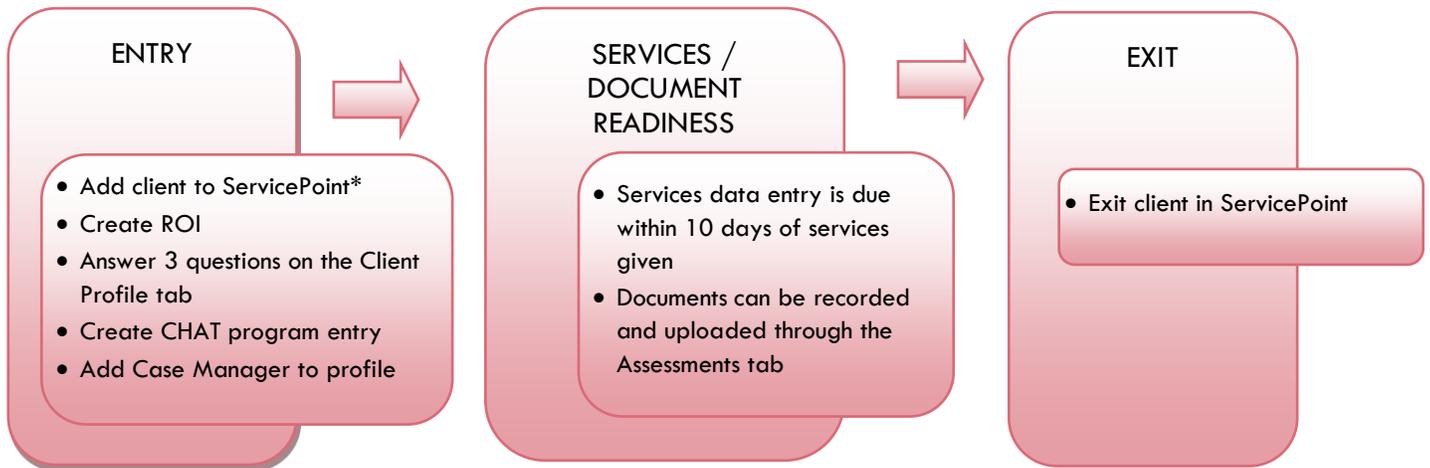
COORDINATED HOUSING ASSESSMENT TEAM (CHAT) SERVICEPOINT HANDBOOK REVISION HISTORY

- 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 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>

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

Transact ROI under
Head of Household

The screenshot shows a web interface for 'Client Information'. At the top, there are two main tabs: 'Client Information' and 'Service Transactions'. Under 'Client Information', there are sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', and 'Entry / Exit'. A red arrow points to the 'ROI' sub-tab. Below the sub-tabs, there is a section titled 'Release of Information'. Under this section, there are two columns: 'Provider' and 'Permission'. In the 'Provider' column, there is a button labeled 'Add Release of Information', which is highlighted with a red arrow. In the 'Permission' column, the text 'No mat' is visible.

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).

Release of Information					
	Provider	Permission	Start Date	End Date	
	Urban League - SP	Yes	10/05/2021	10/05/2022	
	Urban League - Coordinated Housing Access Team (CHAT)	Yes	10/05/2021	10/05/2022	

Add Release of Information Showing 1-2 of 2

* 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

Client Information	
Summary	Client Profile
Client Record	
Name	Client, Sample
Name Data Quality	Full Name Reported
Alias	
Social Security	
SSN Data Quality	Client refused (HUD)
U.S. Military Veteran?	No (HUD)

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

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

Client Information		Service Transactions	
Summary	Client Profile	Households	ROI
		Entry / Exit	Case Managers
		Case Plans	Assessments
Case Managers			
Name	Provider	Phone Number	Start Date
No matches.			
Add Case Manager			

2 Click 'Add Case Manager'

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

4 Choose your agency's CHAT Provider

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

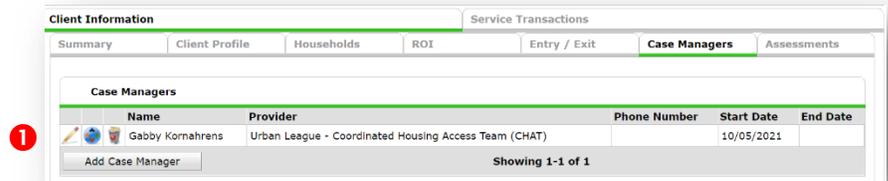
6 Click 'Add Case Manager'

Type*	<input type="radio"/> ServicePoint User <input checked="" type="radio"/> Me <input type="radio"/> Other
Name*	Gabby Kornahrens
Title	
Phone Number	
Email Address	GKornahrens@ulpdx.org
Provider*	Urban League - Coordinated Housing Access Team (CHAT) (6081)
Start Date*	10 / 05 / 2021
End Date	
Add Case Manager Cancel	

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.

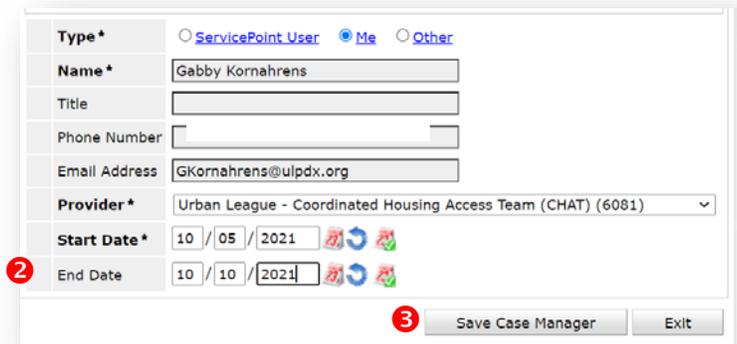
- 1 Click on the pencil next to the name of the former Case Manager



Name	Provider	Phone Number	Start Date	End Date
Gabby Kornahrens	Urban League - Coordinated Housing Access Team (CHAT)		10/05/2021	

Showing 1-1 of 1

- 2 Set the End Date to the day before you started working with the client
- 3 Click 'Save Case Manager'
- 4 Follow the steps above to add yourself as the new Case Manager



Type * ServicePoint User Me Other

Name * Gabby Kornahrens

Title

Phone Number

Email Address GKornahrens@ulpdx.org

Provider * Urban League - Coordinated Housing Access Team (CHAT) (6081)

Start Date * 10 / 05 / 2021

End Date 10 / 10 / 2021

Save Case Manager Exit

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

The screenshot shows the 'Assessments' tab in the Servicepoint interface. The 'OR-501: Coordinated Access Document Readiness' assessment is selected, and the 'Submit' button is visible. Below this, the 'Documents required for CoC-funded PSH - Top Priority' section is shown, with the 'Add' button highlighted. The 'Assessments' tab is also highlighted in the top navigation bar.

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

The screenshot shows the 'Documents required for CoC-funded PSH - Top Priority' form. The 'Date Completed' is 10/11/2021, and the 'Top Priority Documents Collected' is 'Photo ID (4 programs require pre-enrollment, but most prefer to have it)'. The 'Save' and 'Save and Add Another' buttons are highlighted.

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
