Family System Housing Navigator

ServicePoint Handbook

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

Version 1.2

Family System Housing Navigator ServicePoint Handbook - Revision History

- **Version 1.3 Updated 12/7/2020 –** Workflow change to updating Assessment scores
- **Version 1.2 Updated 11/4/2020 -** Exiting Coordinated Entry Workflow Process added. See Appendix C
- **Version 1.1 Updated 10/7/2020 -** Coordinated Entry Workflow process changed. Appendix C added
- **Original version published February 2020**

FAMILY SYSTEM HOUSING NAVIGATOR PROGRAM MODEL

The Homeless Families System of Care is implementing a new Coordinated Access function to improve the accessibility of housing resources for households entering the Homeless Families System of Care. The *Family System Housing Navigators* will engage families from the family queue who are next to participate in family system services. The navigator will participate in engagement and navigation activities with families to facilitate a smooth and rapid transition into housing resources. Engagement and navigation activities may include but are not limited to relationship development, information and referral, vulnerability assessment, barrier mitigation and document readiness. The navigator will also participate in a case conferencing process with the Coordinated Access team twice per month where families are matched and referred to resources according to resource availability, program capacity and needs of the household.

TRAUMA INFORMED
A driving framework that recognizes the impact of trauma on family stability

ASSERTIVE ENGAGEMENT
A client-driven and strengths-based mode of practice that empowers individuals to overcome barriers and achieve self-suficiency

DATA MILESTONES – FAMILY SYSTEM HOUSING NAVIGATOR

COORDINATED ACCESS

- Review and update intake assessment data <u>if needed.</u> **(Refer to Coordinated Access Handbook)***

FAMILY SYSTEM HOUSING NAVIGATOR

- Transacts ROI
- Create Housing Navigator entry into ClientPoint
- Record any service with an expense attached

PROGRAM EXIT

- Exit Family from Family System Housing Navigator when family is enrolled in a housing program If no longer seeking services, see Appendix C.

*The data workflow for Coordinated Access for Families with Minor Children is documented in separate ServicePoint Handbooks entitled "Coordinated Access for Adults and Families. Please refer to that handbook for detailed instructions on how to update the family assessments. Note: Major changes to this process occurred 10/1/2020.

The most recent version of these handbooks can be downloaded at:
https://multco.us/multnomah-county-servicepoint-helpline/homeless-family-system-care-hfsc

REVIEW/UPDATE Assessment

It is quite common that upon reassessment families may reveal additional vulnerabilities not previously communicated. If there is a need, please review and update the Family Assement (Note: it is not our intent to lower scores, ie something took place over 6 months ago) to insure family gets placed into the appropriate housing program. See Appendix C for additional information.

The data workflow for Coordinated Access for Families with Minor Children is documented in a separate ServicePoint Handbooks entitled "Coordinated Access for Adults and Families. Please refer to that handbook for detailed instructions on how to enter vulnerability assessments.

The most recent version of these handbooks can be downloaded at:
https://multco.us/servicepoint/manualsguides

TRANSACT ROI

After clients sign a *Client Consent to Release of Information for Data Sharing in Multnomah County* form for their household, transact Parent and Program level ROI to all household members.

Clients only need to sign one Client Consent form per agency.

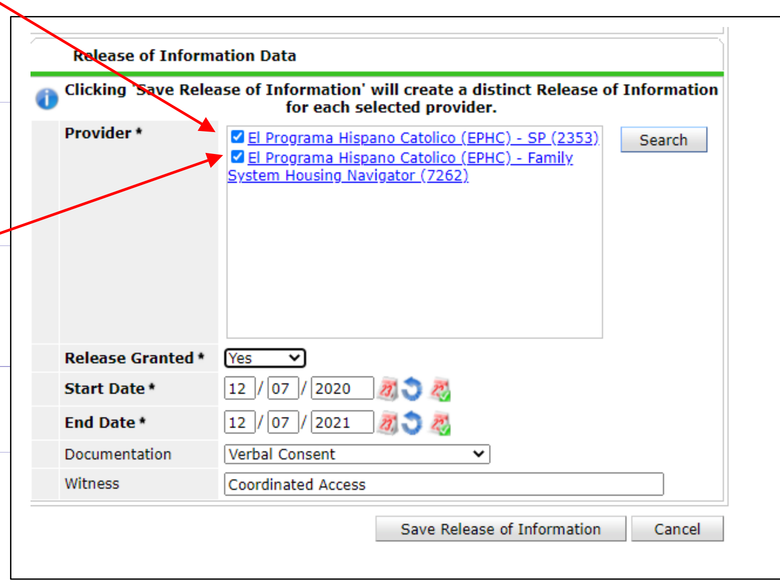
Only one Client Consent form needs to be signed per household, but it needs to be transacted in SP under multiple SP providers, including the Parent provider: Portland Homeless Family Solutions (PHFS) –SP and the program provider: PHFS Winter Shelter Outreach.

Download Client Consent forms here: https://multco.us/multnomah-county-servicepoint-helpline/homeless-family-system-care-hfsc

View a Video on How to Transact an ROI here: https://www.youtube.com/watch?v=A6YYacA-sd4

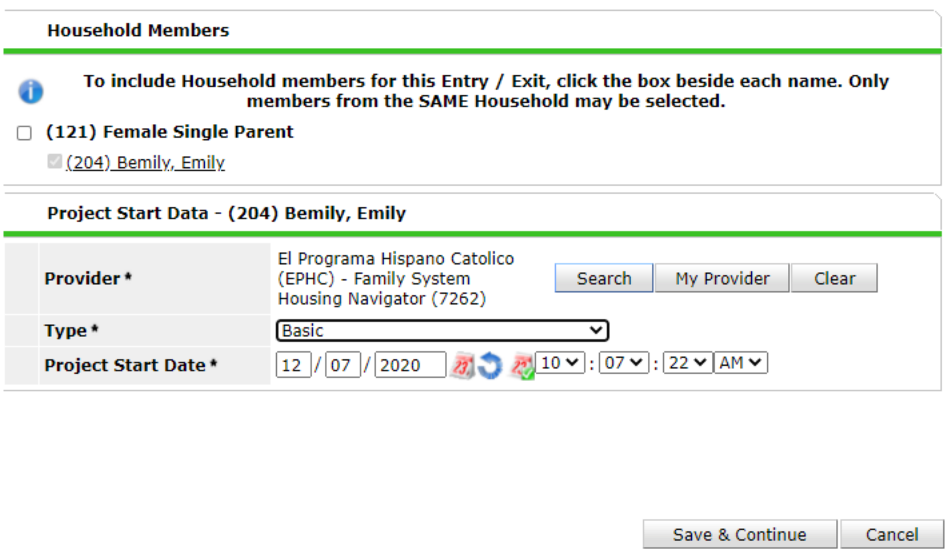
Transact ROI under Head of Household In the client profile of the Head of Household, click on the "ROI" tab. Ther on "Add Release of Information"

Provider	Click 'Search' to select your PARENT provider (also known as your Login provider) AND the Family Navigator Provider
Release Granted	
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	Enter *Coordinated Access*



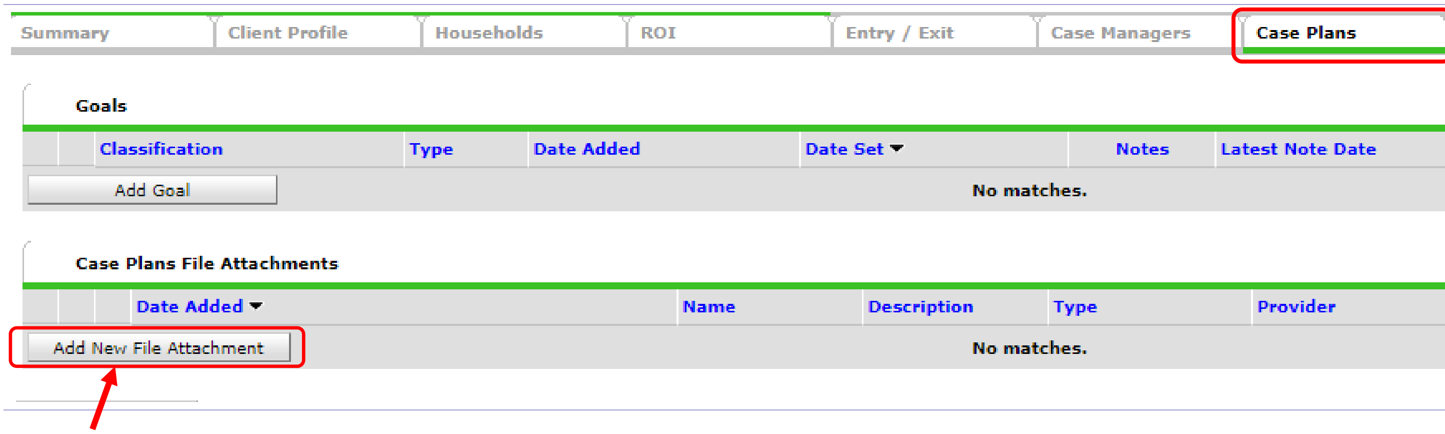
ADD FAMILY SYSTEM HOUSING NAVIGATOR PROGRAM ENTRY

Entry Type is Basic
Note: Only add to Head of Household, even if other members are present



DOCUMENT READINESS

Collect all documents necessary for the rental process. Scan documents and store in the **Case Plans tab**. Feel free to use the Description box for tracking anything you find helpful for your use or the next case manager if desired – this will not appear any reports.



For scanned documents, ID cards, income statements, etc.

ENTER SERVICES

To add a service, click on "Add Service" from the Client Information/Summary tab or Service Transactions tab.

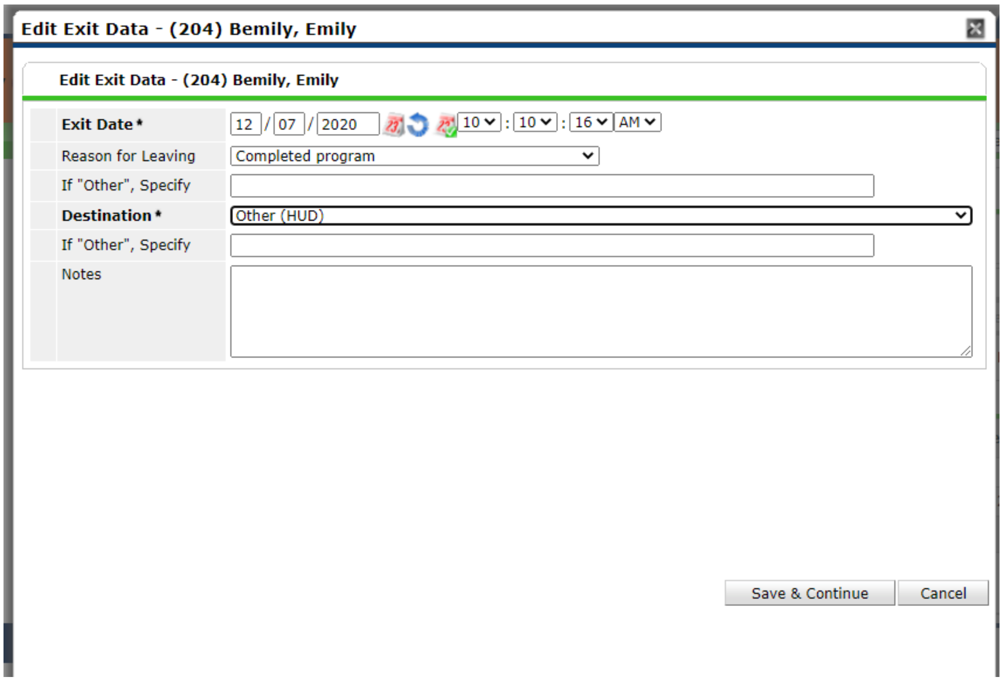
Record every service by date that has a $ amount

Start Date	Set Start Date to the last day of the month that the service occurred (Ex: all January Services should be dated January 31, February = 2/28, March = 3/31, etc.)
End Date	Leave Blank
Service Type	Leave Blank
Provider Specific Service	Select bus tickets, driver's license/Permits, or any other applicable service
Service Staff	Leave blank
Service Notes	Leave blank or use to track more information related to the services (not required)
Number of Units	Exact dollar amount spent on this service category
Unit Type	Select Dollars

EXITING FROM FAMILY SYSTEM HOUSING NAVIGATOR

When family is prepared to move into the next phase of housing, exit the family from the El Programa Hispano Catolico Family System Housing Navigator provider program. Include all family members.

- **Reason for leaving** = Completed program
- **Destination** = Other (HUD)

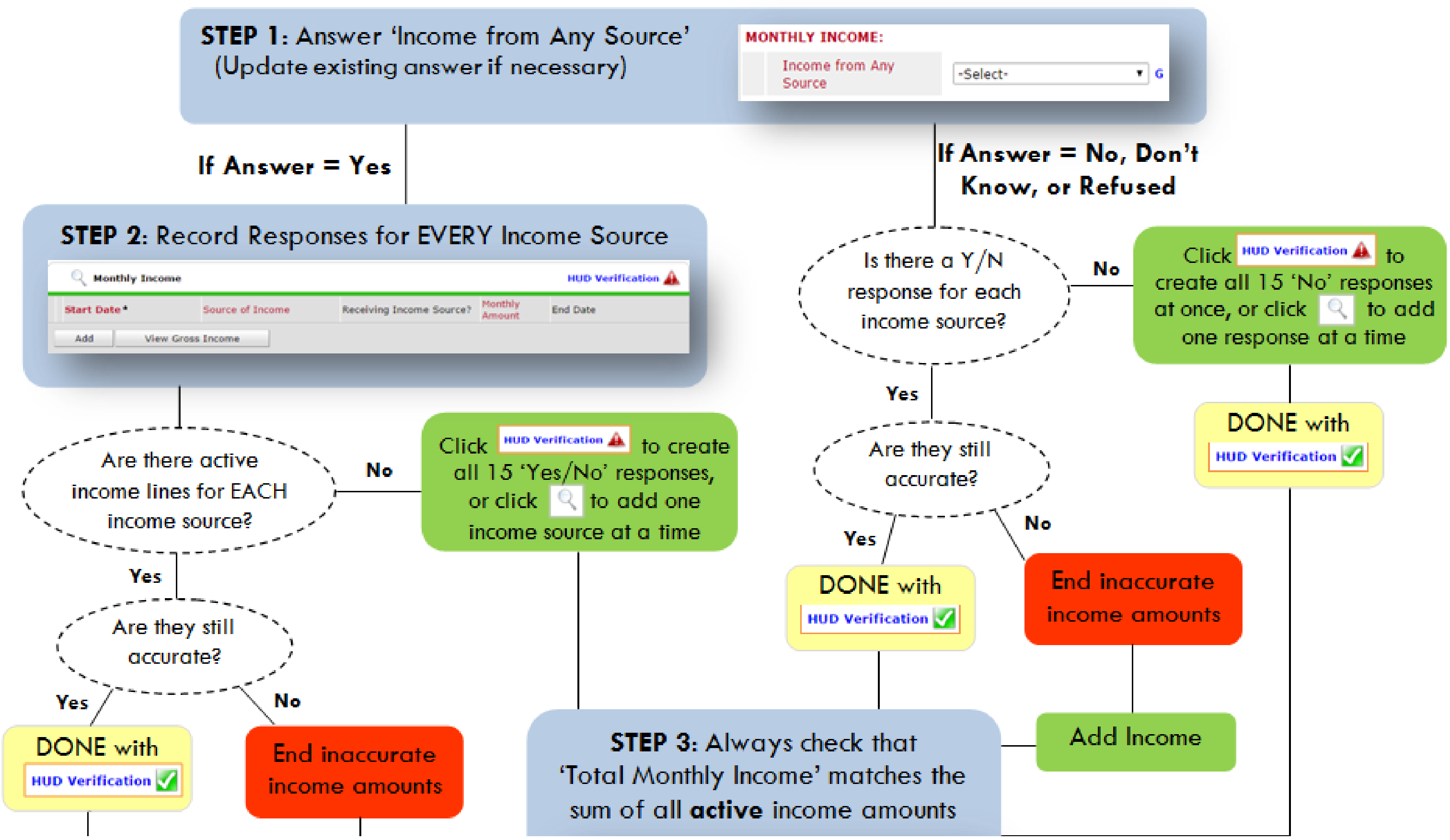


APPENDIX A

RECORDING CLIENT INCOME IN SERVICEPOINT FOR HUD COMPLIANCE

- Each client's record should store snapshots of their income at the time of their program entry, exit, and followups. **Never update a client's income by deleting or writing-over the answers in an existing income record.**
- Each income type or source should have a Yes or No response
- Only record ONGOING income
- Do not record amounts for Non-Cash Benefits
- New program entries pre-fill with income data from previous entries. If the income data that pre-fills is not accurate for your point in time, **end date** it and **add** a new/updated income.
- When completing an annual review, record changes through the 'Interims' icon. Do not change answers in Program Entry.

Follow the process below to record client income at Entry, Annual Review, and Exit:



ADDING INCOME

❶ To create all 15 income responses at once for NEW clients, click the HUD V icon HUD Verification
If updating clients who already have responses, click the magnifying glass

❷ Leave Start Date as default (date of Entry, Annual Review, or Exit)

❸ Select Source of Income

❹ Monthly Amount = ($ amount from this source)

❺ Leave End Date blank

❻ Save /add another and Exit

ENDING INCOME

✪ **If updating income at Entry/Exit, enter data in client's program Entry/Exit. If updating income *during* enrollment, use appropriate interim.**

❶ Click the pencil next to outdated income

❷ Leave Start Date, Source, and Amount unchanged

❸ End Date = the **day before** Entry/Annual Review/Exit

❹ Save and Exit

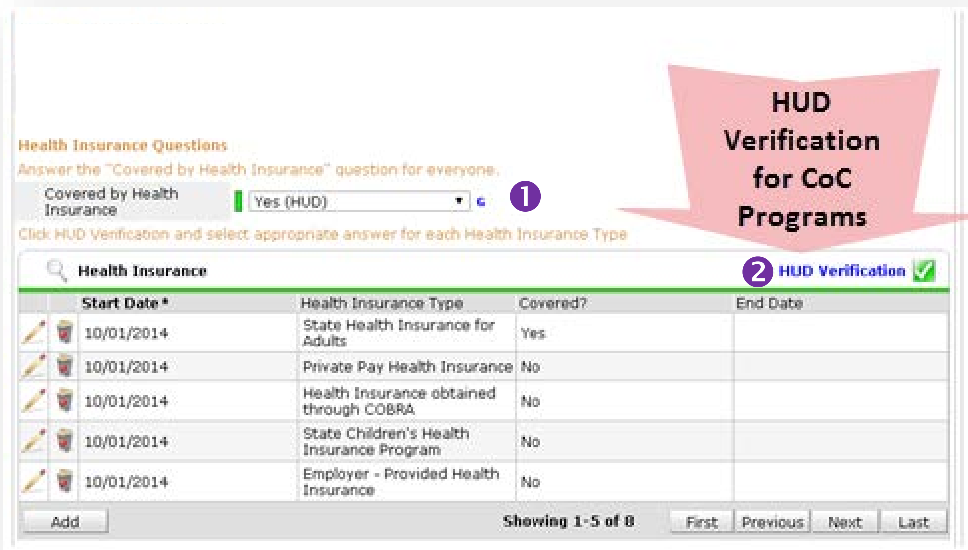
NOTE: **Follow the same process when recording Benefits, Disabilities and Health Insurance**

APPENDIX B

Answering HUD Verification Questions for New Participants

Your program's Entry may include the following questions:

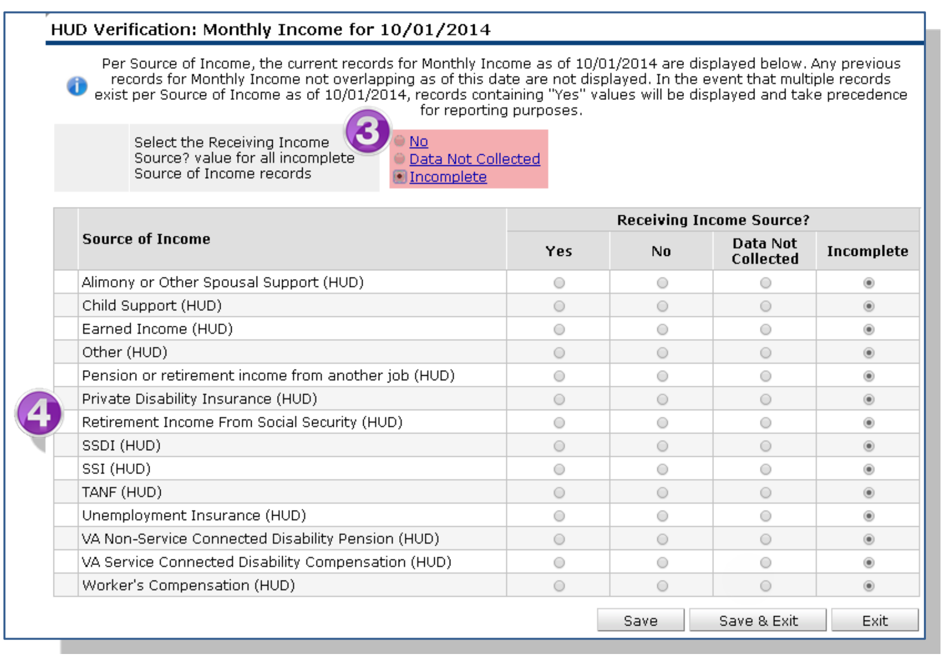
- Health Insurance
- Disabilities
- Monthly Income
- Non-Cash Benefits



Though these four questions each have different answers available to choose from, all function the same way. This type of question has two parts to answer:

1. Answer the Yes/No question that sits above the HUD Verification.

2. Click HUD Verification, which opens the next window.



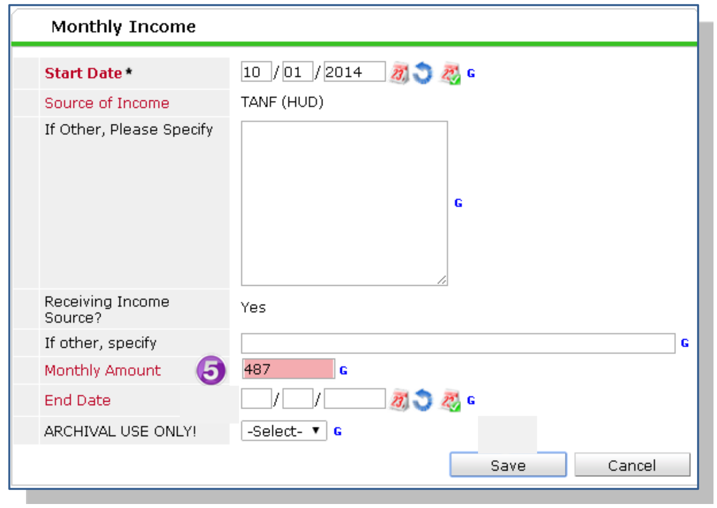
3. Select the "No" link. All of the answers in the bottom section will shift to "No".

4. Carefully review the list of answers. If one of the answers applies to the participant, shift the answer on that one line to a "Yes".

If you answer "Yes" to an Income Source for the Monthly Income question, or for the Disability types, an additional box will pop up. See Step 5 and/or 6 below.

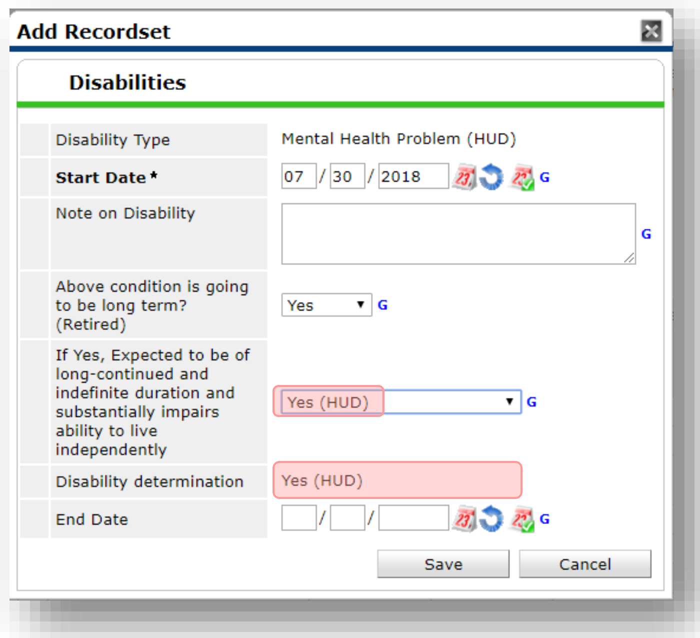
Otherwise, click **Save & Exit**.

5. **INCOME**: Enter the amount of that Income. Enter an approximate amount if necessary.



Record all income received in the 30 days prior to intake, but only if it that income will be continuous and ongoing.

6. **DISABILITIES**: Enter "Yes"* in the 2 fields below the Note on Disability box.



***If the project requires an official documentation of disability, you must have that in the client file in order to enter "Yes".**

Click **Save.**

Continue answering the remaining Entry questions.

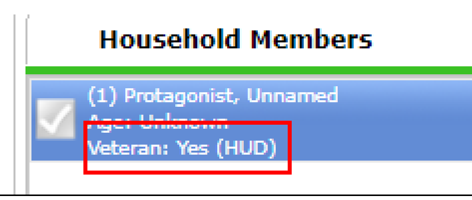
When you're done answering questions for the Head of Household, remember to click **Save**, then scroll back to the top of the entry window and click on the names of any other household members included in the entry to complete their assessments.

APPENDIX C

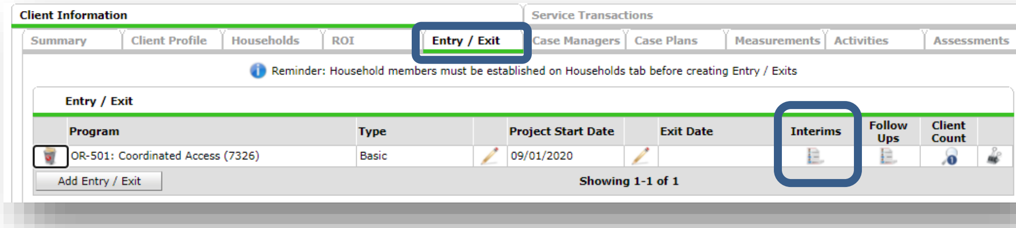
UPDATES / SCORE APPEALS / INTERIM REVIEWS

Updates to client information (Current Living Situation changes, Coordinate Entry Assessments, Score Updates) will happen through the **Interims icon** on the Entry/Exit tab.

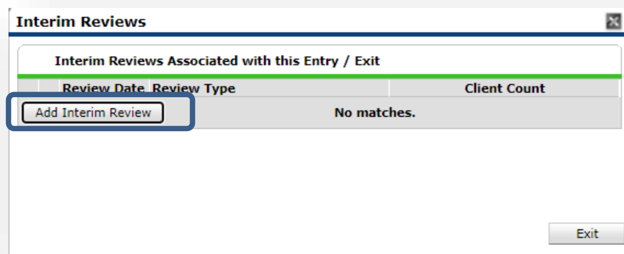
Guidelines for when to update assessments

ASSESSMENT	WHEN TO UPDATE
HUD Questions	**CURRENT LIVING SITUATION:** Anytime any of the following occurs: • A Coordinated Entry Assessment or Coordinated Entry Event is recorded • The client's living situation changes • If a Current Living Situation hasn't been recorded for longer than 365 days and the client has connected with workers for Coordinate Access support • Project Start **COORDINATED ENTRY ASSESSMENT:** • **Each new assessment**
OR-501 Coordinated Access for Adults or Families with Children	• If the client has an existing entry, existing scores can be updated via <u>ENTRY/EXIT INTERIM REVIEW</u> • 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 and new Entry/Exit – <u>ADD NEW ENTRY</u>
VETS & RECOVERY	**RECOVERY** if the following 3 questions are YES • Do you have a history of drug or alcohol use? • Are you in recovery? • If available, would you be interested in living totally clean and sober in housing that supports your recovery with peer support and case management? **VETERANS** if U.S. Military Veteran? = Yes 
SCORE APPEALS	• Score appeals discussions will happen off-line and handled administratively • Once score appeal has been determined, EDIT THE Most recent transaction (entry or interim) to reflect the appealed score

From the Entry/Exit tab, click on the Interims icon next to the **OR-501: Coordinated Access (7326) entry**



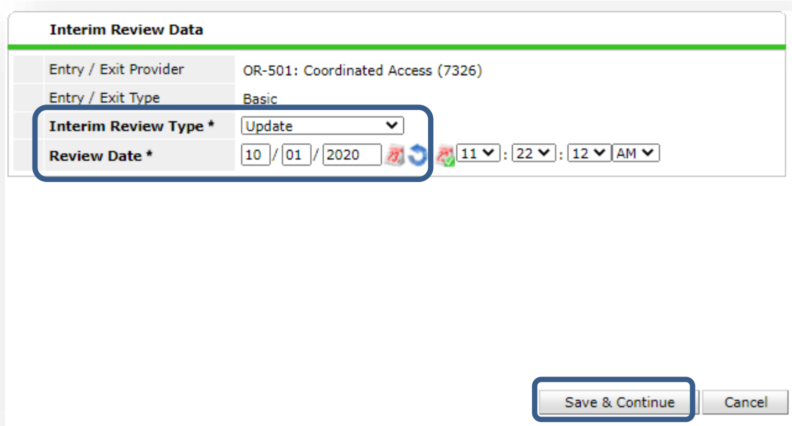
Click Add Interim Review



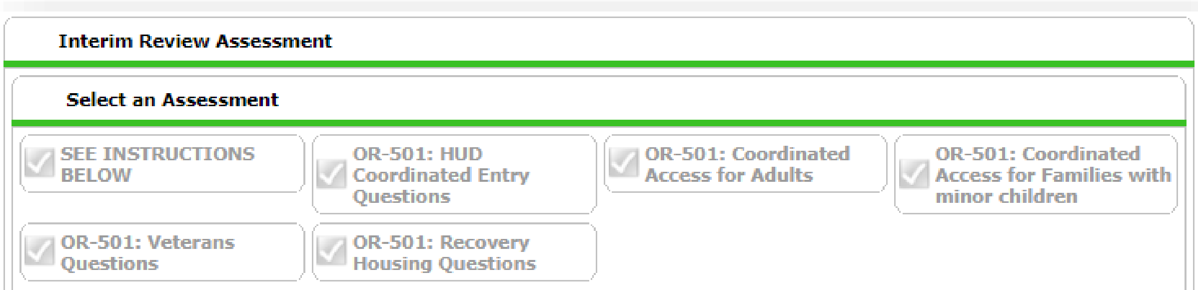
Interim Review Type: Update

Review Date: date you collected the information

Click Save & Continue



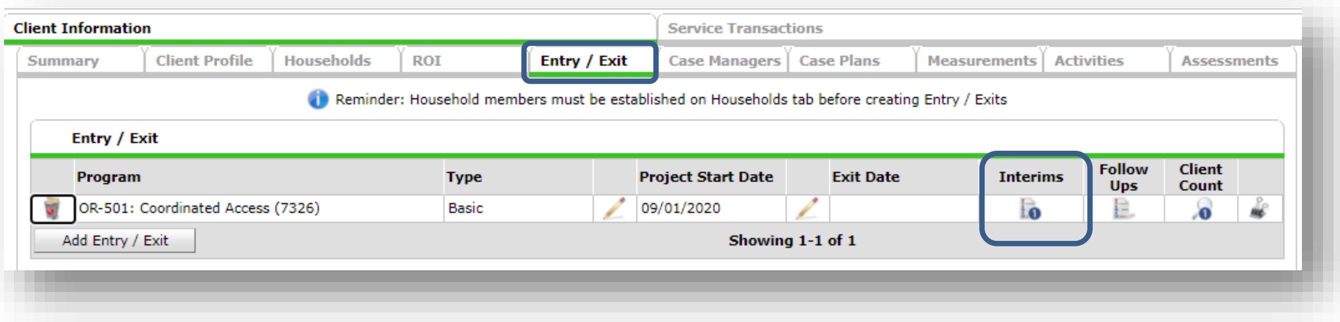
Choose which assessment you would like to update



If updating multiple assessments, remember to scroll back to the top to choose each one.

When all relevant assessments have been updated, Save & Exit

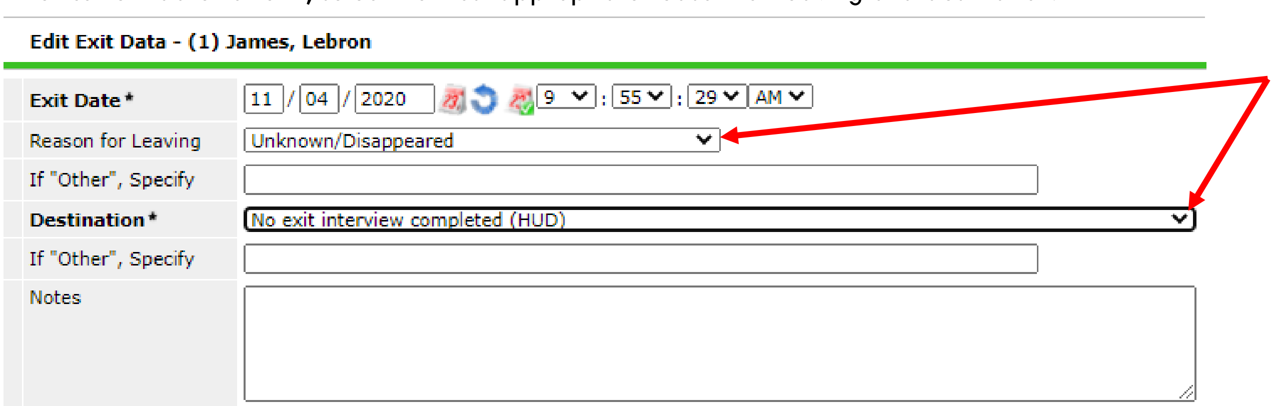
You will be returned to the Entry/Exit tab, and you will see a number 1 on the Interim icon. The number grows as more Interim Reviews are added.



EXITING HOUSEHOLD FROM COORDINATED ENTRY

If family has been able to resolve their housing situation and no longer needs or desires services or cannot be contacted, exit the family from Coordinated Entry. First click on the pencil:

Enter current date for exit, select the most appropriate reason for leaving and destination.



You will land on this screen, Save & Exit