

# Family System Housing Navigator ServicePoint Handbook

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Questions? Contact the ServicePoint Helpline at 503.970.4408 or [servicepoint@multco.us](mailto: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.

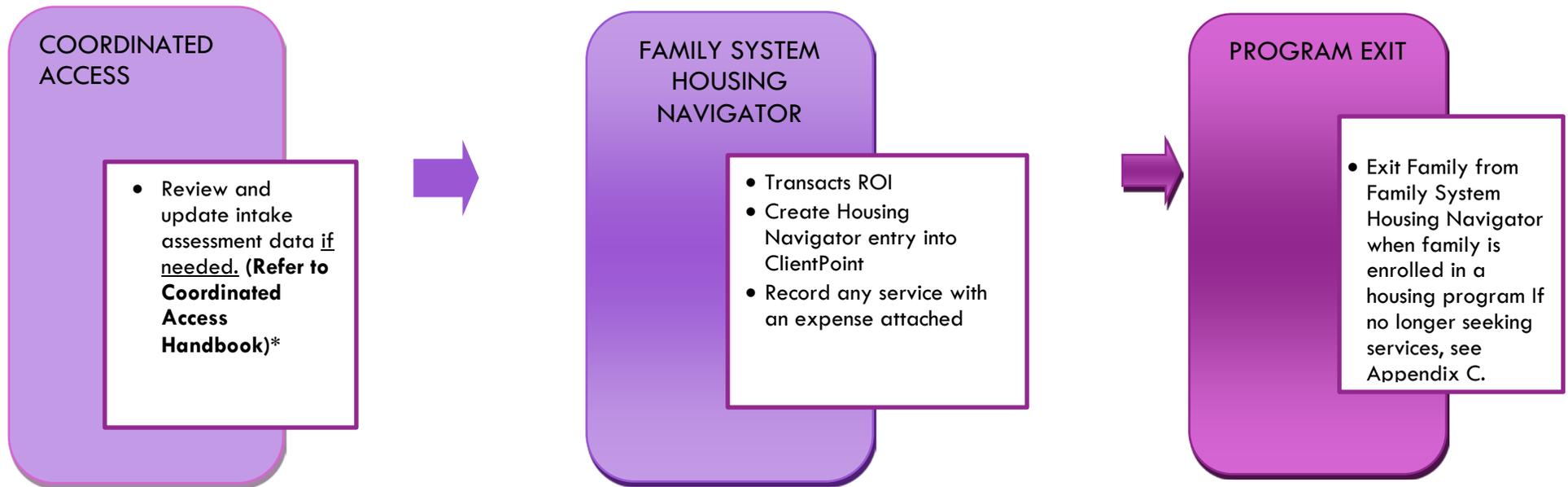
## TRAUMA INFORMED

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-sufficiency

# DATA MILESTONES – FAMILY SYSTEM HOUSING NAVIGATOR



\*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 Assessment (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. Then on “Add Release of Information”



The screenshot shows the 'Client Information' interface with the 'ROI' tab selected. Below the tabs, there is a 'Release of Information' section with a table. The table has two columns: 'Provider' and 'Permission'. A red box highlights the 'Add Release of Information' button in the 'Provider' column. The 'Permission' column shows 'No mat'.

Client Information		Service Transactions		
Summary	Client Profile	Households	ROI	Entry / Exit
<b>Release of Information</b>				
	<b>Provider</b>	<b>Permission</b>		
	Add Release of Information	No mat		

Provider	Click 'Search' to select your <b>PARENT</b> provider (also known as your Login provider) <u>AND</u> the <b>Family Navigator Provider</b>
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 <i>Coordinated Access</i>

**Release of Information Data**

Clicking 'Save Release of Information' will create a distinct Release of Information for each selected provider.

Provider \*

- El Programa Hispano Catolico (EPhC) - SP (2353)
- El Programa Hispano Catolico (EPhC) - Family System Housing Navigator (7262)

Release Granted \* Yes

Start Date \* 12 / 07 / 2020

End Date \* 12 / 07 / 2021

Documentation Verbal Consent

Witness Coordinated Access

Save Release of Information Cancel

## ADD FAMILY SYSTEM HOUSING NAVIGATOR PROGRAM ENTRY

Entry Type is Basic

Note: Only add to Head of Household, even if other members are present

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(121) Female Single Parent

(204) Bemily, Emily

**Project Start Data - (204) Bemily, Emily**

Provider \* El Programa Hispano Catolico (EPhC) - Family System Housing Navigator (7262) Search My Provider Clear

Type \* Basic

Project Start Date \* 12 / 07 / 2020 10 : 07 : 22 AM

Save & Continue Cancel

## 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.

Summary Client Profile Households ROI Entry / Exit Case Managers **Case Plans**

**Goals**

Classification	Type	Date Added	Date Set	Notes	Latest Note Date
Add Goal					
No matches.					

**Case Plans File Attachments**

Date Added	Name	Description	Type	Provider
Add New File Attachment				
No matches.				

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)

The screenshot shows a web form titled "Edit Exit Data - (204) Bemily, Emily". The form has a header bar with the same title. Below the header, there are several input fields:

- Exit Date \***: A date picker showing 12/07/2020 with time selection options (10:10:16 AM).
- Reason for Leaving**: A dropdown menu with "Completed program" selected.
- If "Other", Specify**: An empty text input field.
- Destination \***: A dropdown menu with "Other (HUD)" selected.
- If "Other", Specify**: An empty text input field.
- Notes**: A large empty text area for additional information.

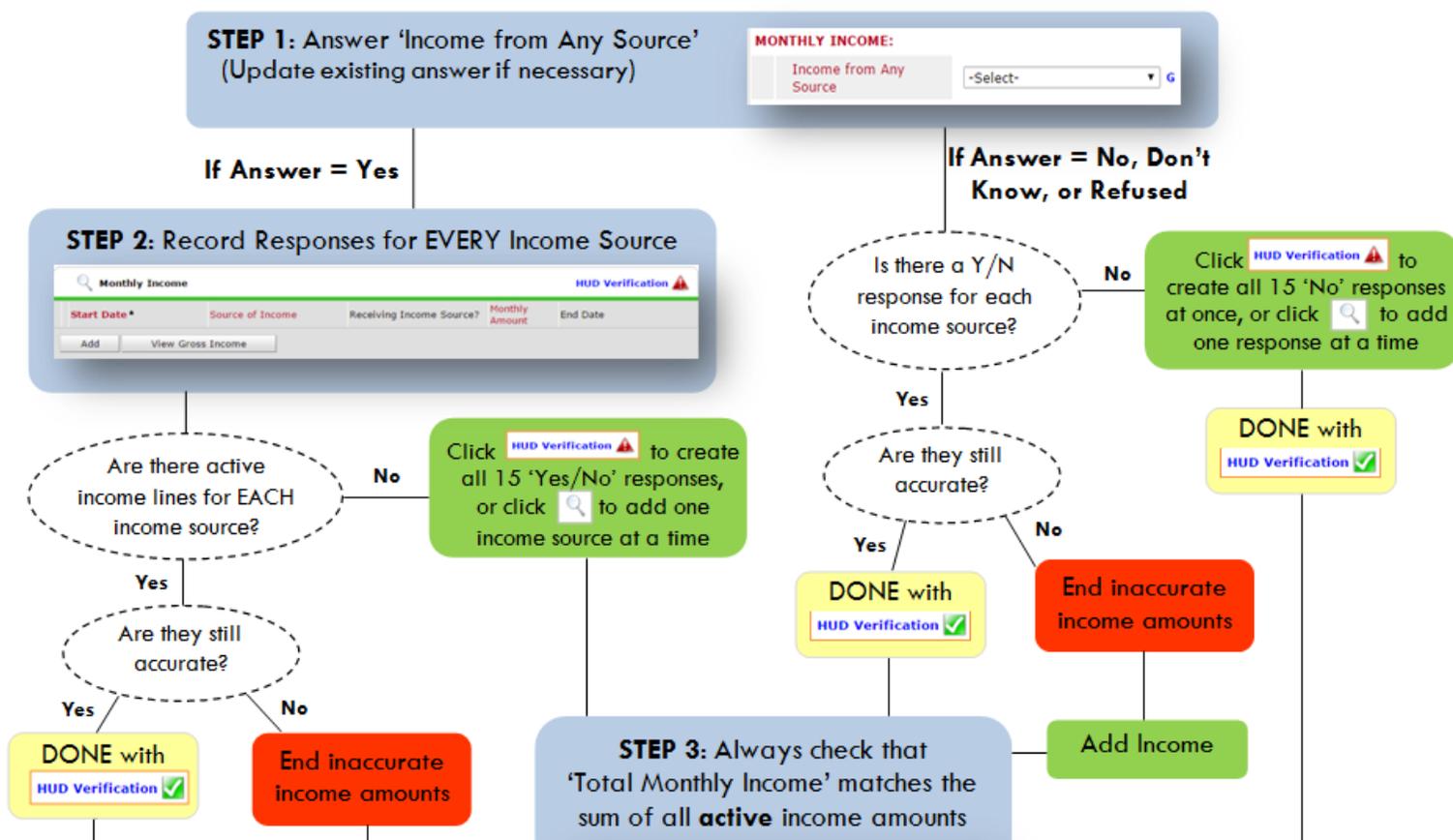
At the bottom right of the form, there are two buttons: "Save & Continue" and "Cancel".

## 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

- 1 To create all 15 income responses at once for NEW clients, click the HUD V icon . If updating clients who already have responses, click the magnifying glass .
- 2 Leave Start Date as default (date of Entry, Annual Review, or Exit)
- 3 Select Source of Income
- 4 Monthly Amount = (\$ amount from this source)
- 5 Leave End Date blank
- 6 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.
- 1 Click the pencil next to outdated income
  - 2 Leave Start Date, Source, and Amount unchanged
  - 3 End Date = the day before Entry/Annual Review/Exit
  - 4 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.

**Health Insurance Questions**  
Answer the "Covered by Health Insurance" question for everyone.  
Covered by Health Insurance:  1

Click HUD Verification and select appropriate answer for each Health Insurance Type

Health Insurance		HUD Verification <span style="color: green;">✔</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">2</span>		
	Start Date *	Health Insurance Type	Covered?	End Date
	10/01/2014	State Health Insurance for Adults	Yes	
	10/01/2014	Private Pay Health Insurance	No	
	10/01/2014	Health Insurance obtained through COBRA	No	
	10/01/2014	State Children's Health Insurance Program	No	
	10/01/2014	Employer - Provided Health Insurance	No	

Showing 1-5 of 8    First   Previous   Next   Last

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**.

**HUD Verification: Monthly Income for 10/01/2014**

Per Source of Income, the current records for Monthly Income as of 10/01/2014 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 10/01/2014, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records 3

No  
 Data Not Collected  
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4

- 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 that income will be continuous and ongoing.**

- 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.



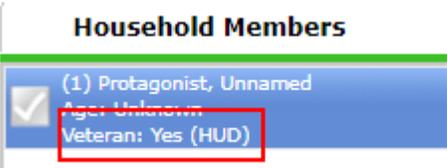
When you’re done answering questions for the Head of Household, remember to click **Save**, then scroll back to the top of the entry window and click on the names of any other household members included in the entry to complete their assessments.

## APPENDIX C

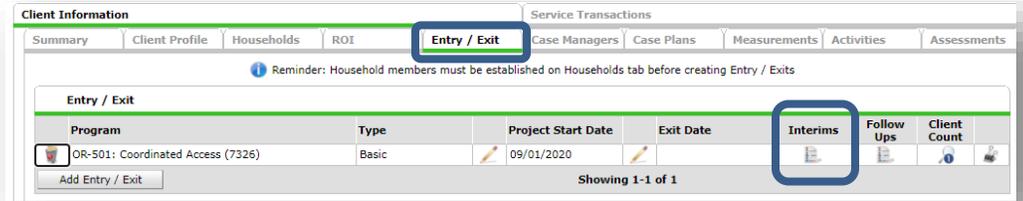
### UPDATES / SCORE APPEALS / INTERIM REVIEWS

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

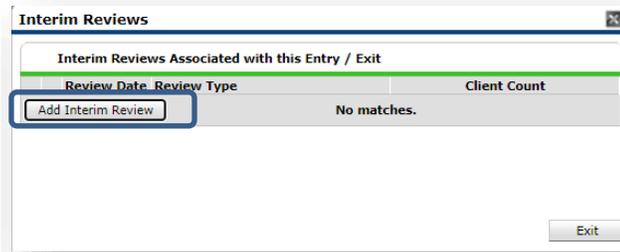
#### **Guidelines for when to update assessments**

ASSESSMENT	WHEN TO UPDATE
HUD Questions	<p><b>CURRENT LIVING SITUATION:</b></p> <p>Anytime any of the following occurs:</p> <ul style="list-style-type: none"> <li>• A Coordinated Entry Assessment or Coordinated Entry Event is recorded</li> <li>• The client’s living situation changes</li> <li>• 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</li> <li>• Project Start</li> </ul> <p><b>COORDINATED ENTRY ASSESSMENT:</b></p> <ul style="list-style-type: none"> <li>• <b>Each new assessment</b></li> </ul>
OR-501 Coordinated Access for Adults or Families with Children	<ul style="list-style-type: none"> <li>• If the client has an existing entry, existing scores can be updated via <u>ENTRY/EXIT INTERIM REVIEW</u></li> <li>• If a client’s Entry/Exits show that they were housed and already exited the program, treat them like a new call and <b>add new</b> screening scores and new Entry/Exit – <u>ADD NEW ENTRY</u></li> </ul>
VETS & RECOVERY	<p><b>RECOVERY</b> if the following 3 questions are YES</p> <ul style="list-style-type: none"> <li>• Do you have a history of drug or alcohol use?</li> <li>• Are you in recovery?</li> <li>• If available, would you be interested in living totally clean and sober in housing that supports your recovery with peer support and case management?</li> </ul> <p><b>VETERANS</b> if U.S. Military Veteran? = Yes</p> 
SCORE APPEALS	<ul style="list-style-type: none"> <li>• Score appeals discussions will happen off-line and handled administratively</li> <li>• Once score appeal has been determined, EDIT THE Most recent transaction (entry or interim) to reflect the appealed score</li> </ul>

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

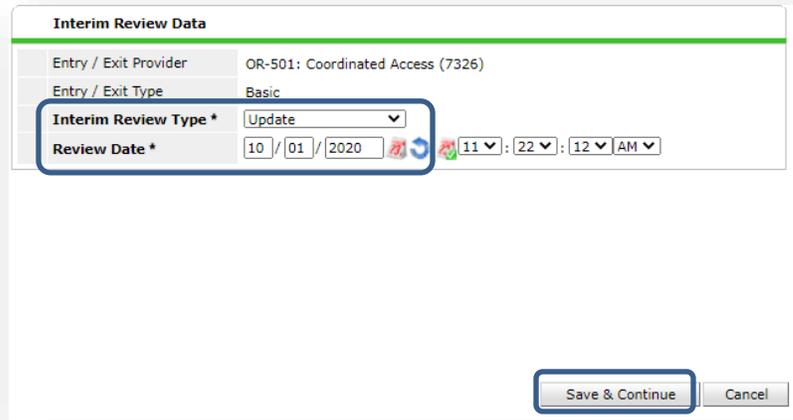


Click Add Interim Review



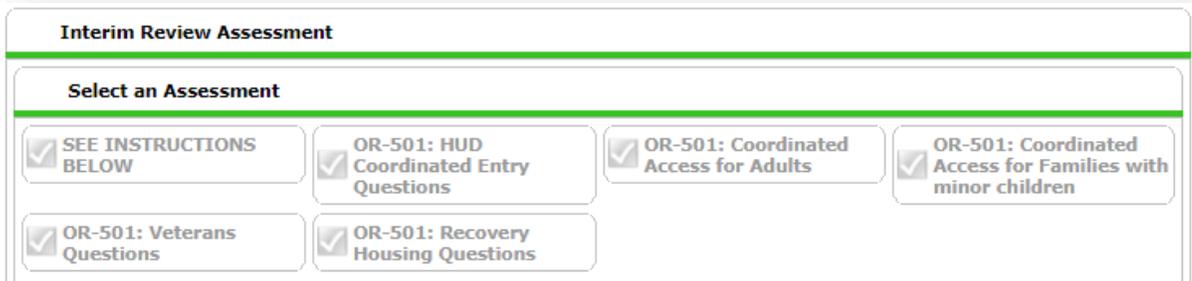
**Interim Review Type:** Update

**Review Date:** date you collected the information



Click Save & Continue

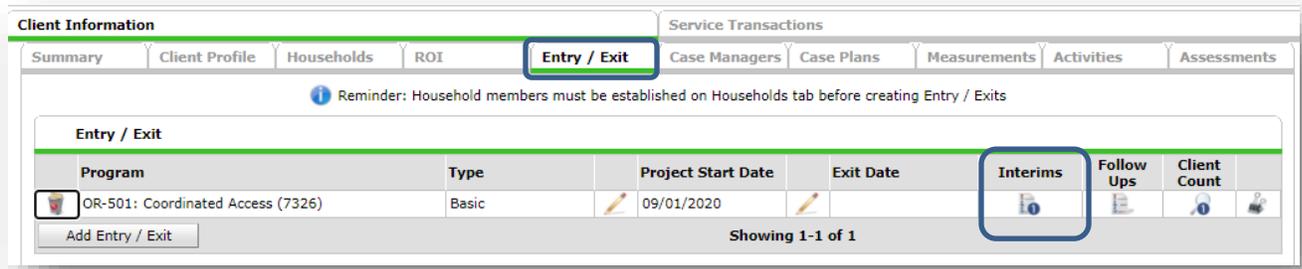
Choose which assessment you would like to update



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.

**Edit Exit Data - (1) James, Lebron**

Exit Date *	11 / 04 / 2020 9 : 55 : 29 AM
Reason for Leaving	Unknown/Disappeared
If "Other", Specify	
Destination *	No exit interview completed (HUD)
If "Other", Specify	
Notes	

You will land on this screen, Save & Exit

