WINTER SHELTER OUTREACH & WINTER SHELTER DIVERSION

ServicePoint Handbook

CONTENTS

Multnomah County

Questions? Contact the ServicePoint Helpline at servicepoint@multco.us

http://multco.us/servicepoint

Winter Shelter Outreach and Diversion ServicePoint Handbook –

Revision History

- **December 2020:** Removed adding services. Revised process for removing families from Coordinated Entry Waitlist (formerly called the Family Queue). December 16, 2020 v1.1

- **Original version published February 5, 2020 v1.0**

DATA MILESTONES

Winter Shelter Outreach:

ENTRY

- Update family assessment if needed*
- Add all HH members
- Transact ROI for entire HH
- Create Winter Shelter Outreach program entry

UPDATES

- Complete/Update picklist
- All data entry is due by 15th of following month

EXIT

- Exit household in ServicePoint when family is placed in Winter Shelter or no longer using outreach services

Winter Shelter Diversion

ENTRY

- Verify HH is complete
- Transact ROI for entire HH
- Create Winter Shelter Diversion program entry
- Notify JOHS to remove family from Waitlist

UPDATES

- Add HMID
- All data entry is due by 15th of following month

EXIT

- Exit household in ServicePoint when rent subsidy is complete

*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.

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

ENTERING WINTER SHELTER OUTREACH CLIENTS IN SERVICEPOINT

Note: On initial assessment to the Family Waitlist, only Head of Household data is collected. You may need to add all other Household members.

BUILD/UPDATE HOUSEHOLD (include all adults and children in Household)

Household Type	
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	

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

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.

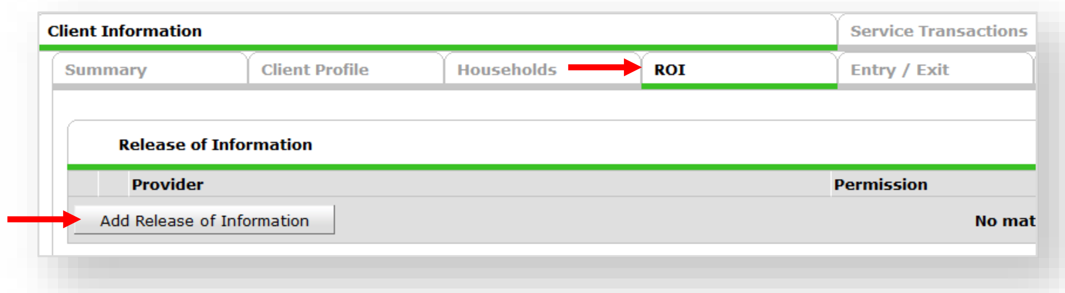
Clients only need to sign one Client Consent form per agency.

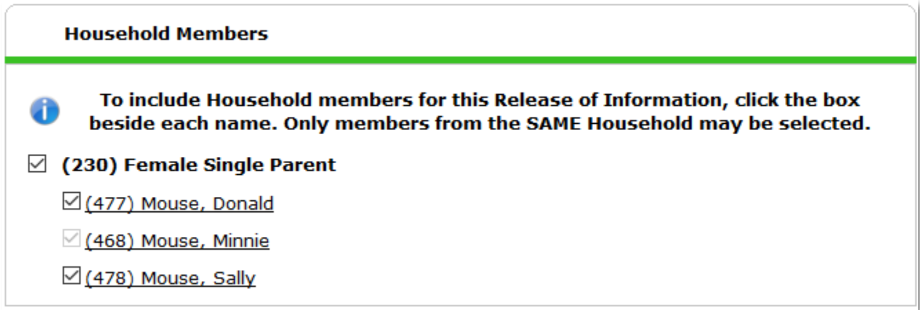
Only one Client Consent form needs to be signed per household, but it needs to be transacted in SP under multiple SP providers, including the Parent provider: Portland Homeless Family Solutions (PHFS) –SP and the program provider: PHFS Winter Shelter Outreach.

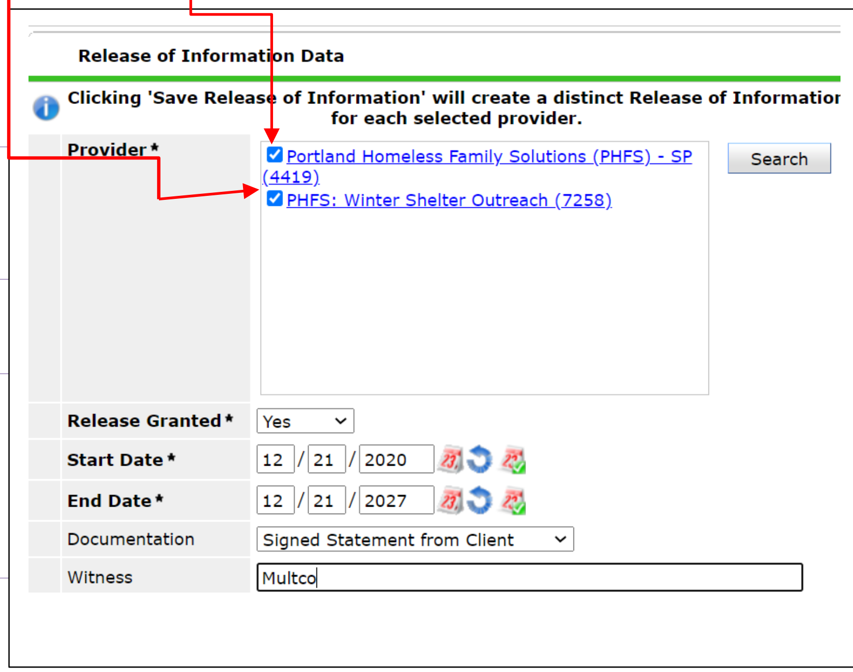
- Download Client Consent forms here: https://multco.us/multnomah-county-servicepoint-helpline/homeless-family-system-care-hfsc
- View a Video on How to Transact an ROI here: https://www.youtube.com/watch?v=A6YYacA-sd4

Transact ROI under Head of Household

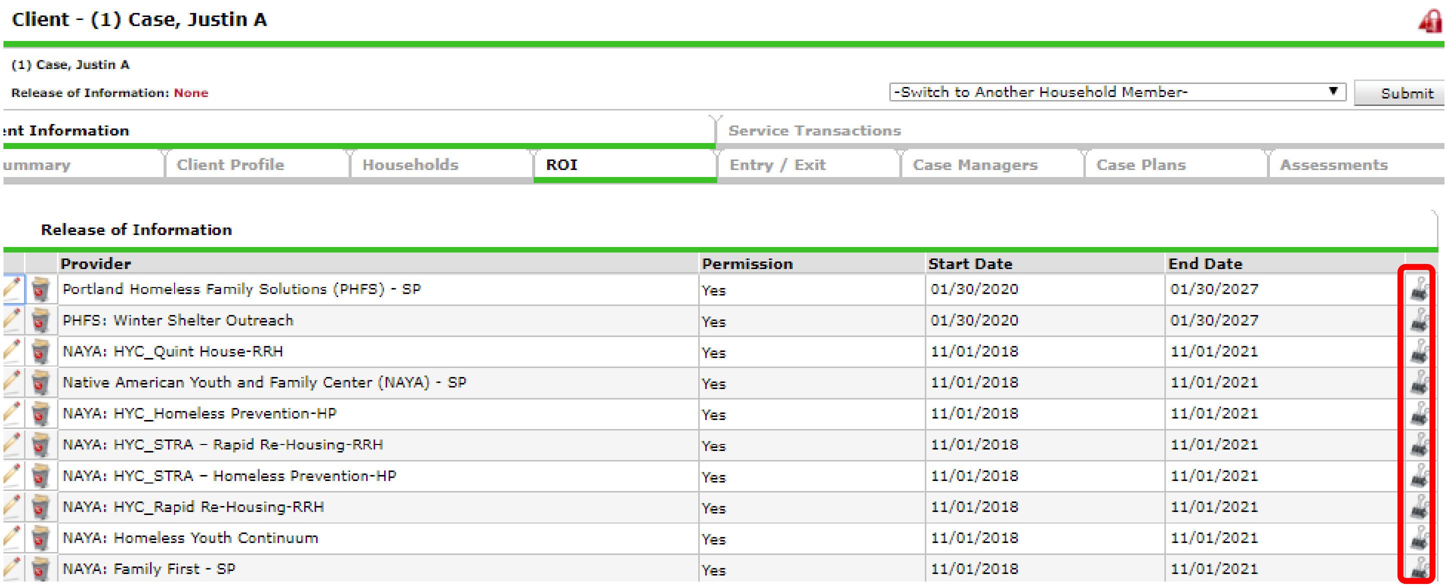
In the client profile of the Head of Household, click on the "ROI" tab. Then, click on "Add Release of Information."



Household Members	Check off **all household members** who were included on the *Client Consent to Release of Information for Data Sharing in Multnomah County* form. 
Provider	Click 'Search' to select your PARENT provider (also known as your Login provider) <u>AND</u> the Winter Shelter Outreach 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	7 years after Start Date
Documentation	Select "Signed Statement from Client" **Verbal consent is not an option**
Witness	Enter *Multco*



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 notice there are other ROIs transacted for the household already and you are unsure what to do: servicepoint@multco.us

ADD PROGRAM ENTRY

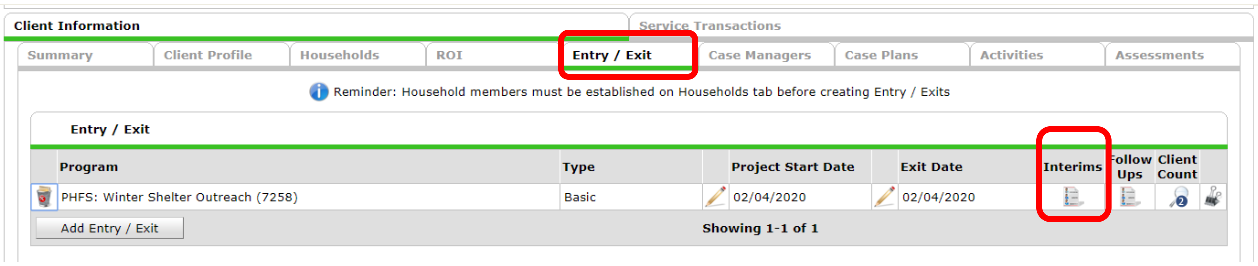
- Create a program entry for the Head of Household by clicking on “Add Entry/Exit” from the Summary or Entry/Exit tabs. Click the check box next to the names of **all household member**s to include in the program entry.
- Go into the entry of **EACH** household member (adults and children) to enter program entry data.

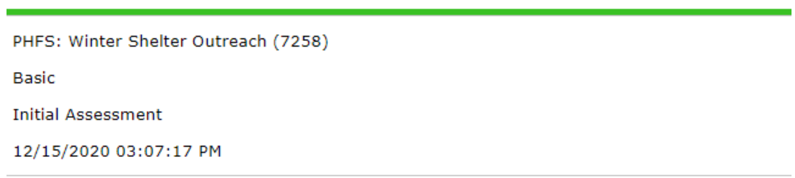
Entry Provider	PHFS: Winter Shelter Outreach
Entry Type	Always choose ‘Basic’
Entry Date	Defaults to data entry date - **Change to date of intake/service**
Complete the following questions for EACH Household Member	
Date of Birth	
Date of Birth Type	
Federal Race/Ethnicity Questions: Required by HUD	
Race	
Race-Additional	(optional) Do not answer the same as ‘Race’ above
Ethnicity	
Gender	
Does the client have a disabling condition?	
Does client have a disabling condition?	
Relationship to Head of Household	
Client Location	OR-501 Portland/Gresham/Multnomah County
Prior Living Situation	
Length of Stay in Previous Place	
Approximate datehomelessness started	
Regardless of where they stayed last night- Number of times the client has been on the streets, in ES, or SH in the past 3 years, including today.	
Total number of months homeless on the street, in ES or SH in the past three years	

ADD INTERIM REVIEW

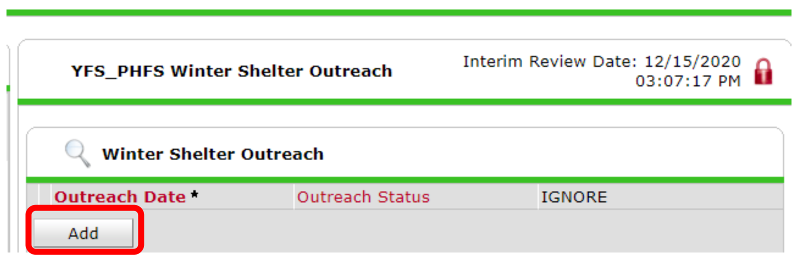
Complete/Update an interim review for head of household only, every time the family advances through the project (receives light touch services/referrals, receives motel voucher and placed in emergency shelter). Update the Interim as needed; **do not add a second interim review.**

1. On the Entry/Exit tab, in line with the PHFS Winter Shelter Outreach entry, select Interims
2. Click "Add Interim Review"; to Head of Household (you may need to **uncheck other members of household**)
3. For Interim Review Type select Initial Assessment; Review Date will be the day the activity happened
4. Add all applicable outreach activities as they happen. You can add activities by date.
5. Select best option(s)





Select Add



Enter date, choose: Family receives light touch services, referral, and/or

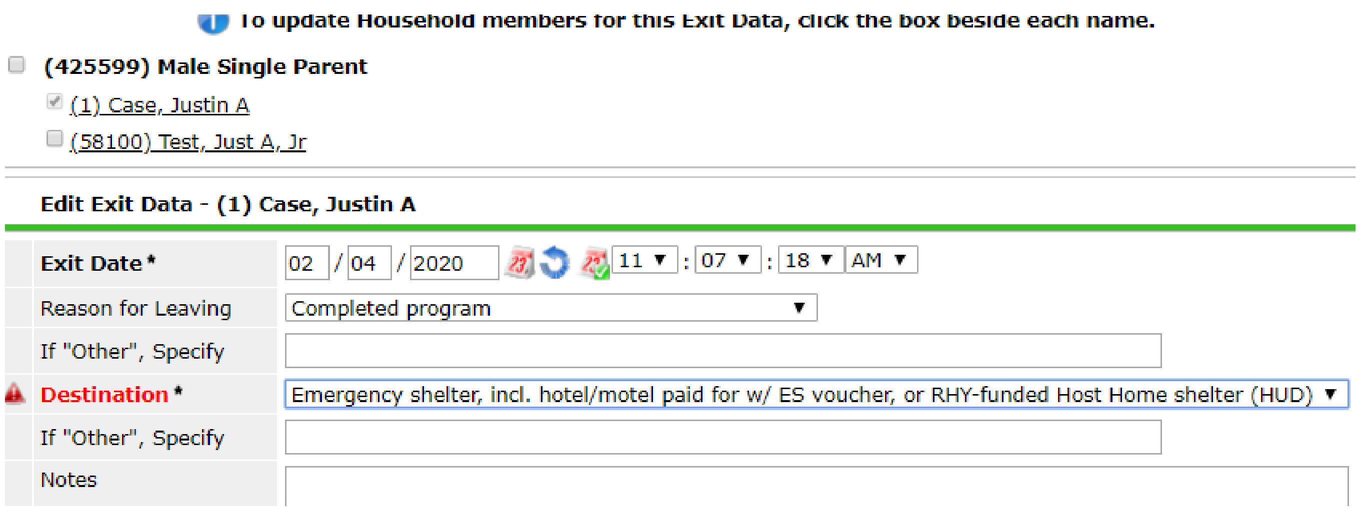
Family receives motel voucher, or

Family is admitted to Emergency Shelter

For subsequent Interim Review (ie, family moves from motel to shelter), you will start at the same place – the Interims icon on the Entry/Exit tab.

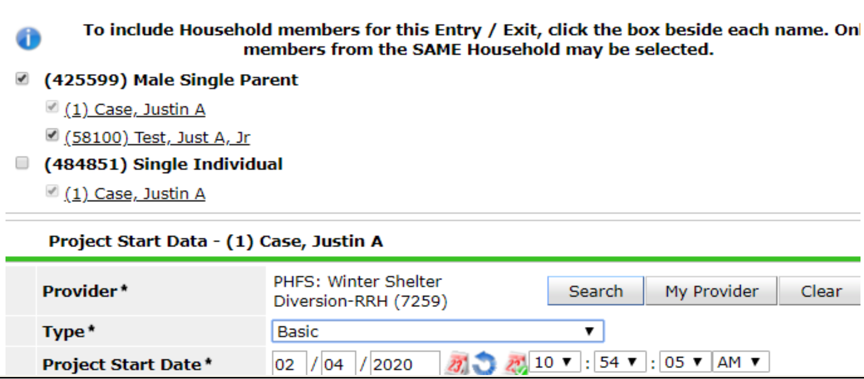
EXIT FROM WINTER SHELTER OUTREACH

When family goes into shelter, exit all family members from outreach. Reason for leaving = Completed program and Destination = Emergency Shelter. If family falls out of service before being placed or gets housing on their own, please select best fitting Reason for Leaving and Destination



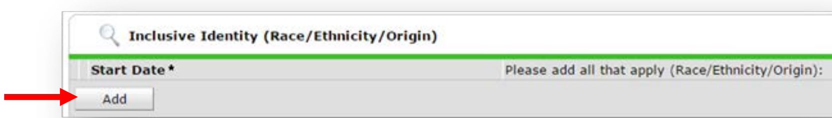
WINTER SHELTER DIVERSION

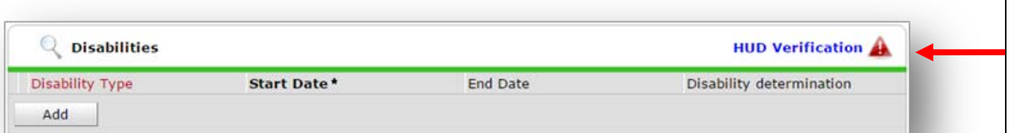
1. When family begins the housing process, add program entry: PHFS Winter Shelter Diversion – RRH (7259; include all members of the Household). Type is Basic, change project start date if needed.
2. Add an additional ROI for PHFS: Winter Shelter Diversion - RRH
3. All family members should be part of the record. complete entry data for all household members



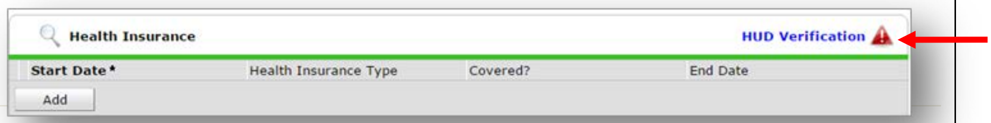
Housing Move-in Date	If this person is NOT in permanent housing at the time of program entry, make sure this field is **blank** (delete date if needed). For Rapid Re-Housing, when permanent housing placement is made, update this field by creating an Interim Review (see page 15).
Relationship to Head of Household	Choose “Self” if client is head of household. Make sure to designate one person as the head of household. Do NOT assign more than one person as the head of
Client Location	Correct answer is: OR-501 Portland/Gresham/Multnomah County
Date of Birth	
Date of Birth Type	
Gender	

Federal Race/Ethnicity Questions: Required by HUD	
Race	
Race-Additional	(optional) Do not answer the same as ‘Race’ above
Ethnicity	

Inclusive Identity: Required Locally	
Inclusive Identity	**Click ‘Add’ to enter a client’s self-identified race/ethnicity. Add all that apply** <u>in addition to</u> the Federal Race/Ethnicity Questions above (i.e. If you entered “V under Race above, enter “White” here as well). 
Primary Language	
If Primary Language is Other, then Specify	Required if Primary Language chosen above is ‘Other’ - **Do <u>not</u> enter a 2nd language or a language that is part of the picklist options under “Primary**
Does client have a disabling condition?	
Disabilities	
	Click ‘HUD Verification’ to create a Y/N response for each Disability Type



Covered by Health Insurance?



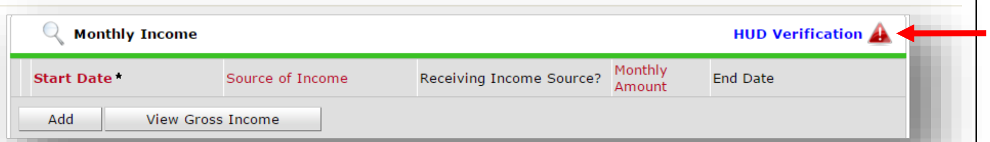
Complete the following questions for Head of Household and All Adults

Income from Any Source?

See Appendix I for detailed instructions on recording and updating already existing client income.

Monthly Income

Click 'HUD Verification' to create a Y/N response for each Income Source
* Only list income that will be **ongoing**
* Enter Household Income provided by a minor in the **Head of Household's profile**



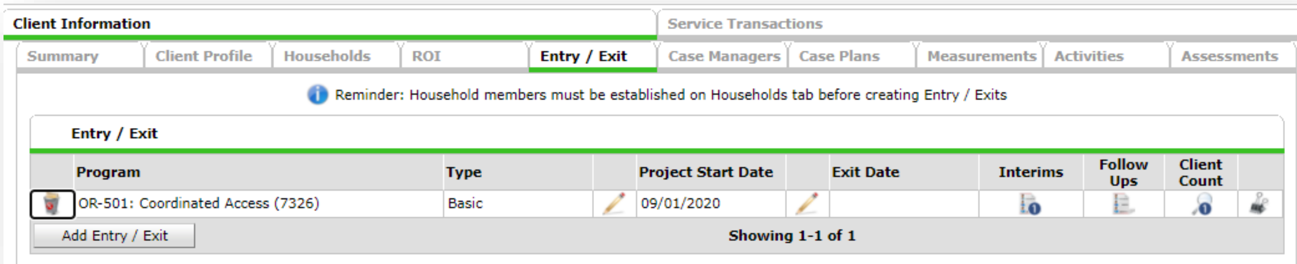
Prior Living Situation	Residence just prior to entry (i.e. the night before entry date). Choose only ONE.
Length of Stay in Previous Place	
If response to Residence Prior to Project Entry is under HOMELESS SITUATION, you will see the following questions:	
Approximate date homelessness started	
Regardless of where they stayed last night - Number of times client has been on the streets, in emergency shelter, or safe	
Total number of months homeless on the street, in emergency shelter or safe haven in the past 3 years	
If response to Residence Prior to Project Entry is under INSTITUTIONAL SITUATION **and** Length of Stay in Previous Place is less than **90 days**, you will see the following questions:	
On the night before, did client stay on the streets, emergency shelter or safe haven? If yes, complete the following:	
Approximate date homelessness started	
Regardless of where they stayed last night - Number of times client has been on the streets, in emergency shelter, or safe haven in the past 3 years including today	
Total number of months homeless on the street, in emergency shelter or safe haven in the past 3 years	
If response to Residence Prior to Project Entry is under TRANSITIONAL AND PERMANENT HOUSING SITUATION **and** Length of Stay in Previous Place is less than **7 days**, you will see the following questions:	
On the night before, did client stay on the streets, emergency shelter or safe haven? If yes, complete the following:	
Approximate date homelessness started	
Regardless of where they stayed last night - Number of times client has been on the streets, in emergency shelter, or safe haven in the past 3 years including today	
Total number of months homeless on the street, in emergency shelter or safe haven in the past 3 years	

Domestic violence victim/survivor?	If response is "Yes," also provide a response to the two follow-up questions: *When did the experience occur?* and *Are you currently fleeing?*
Update the following questions when required by funder or administrator:	
Household Size	Required for EACH Household Member
Percent of Median Family Income	NOT required
Level of Family Income (% HHS Guidelines)	NOT required
Employment Status	Required for Head of Household and ALL Adults
Zip Code of Last Permanent Address	Required for Head of Household and ALL Adults
Client's Residence/Last Permanent Address	NOT required

UPDATING WAITLIST FOR COORDINATED ACCESS (RRH ONLY)

Most Shelter Families go through Coordinated Access and are on the Family Housing Waitlist (formerly called the Family Queue). On October 1, 2020 Coordinated Entry was changed from a referral process to an Entry/Exit process.

<u>The Entry looks like this:</u>



To keep this waitlist clean, it is important to notify JOHS so the family can be removed.

Send an email to ServicePoint - servicepoint@multco.us. Your email should include the ServicePoint client number and date family has been enrolled into a Shelter Diversion RRH program.

If Housing wasn't successful:

Send an email to ServicePoint - servicepoint@multco.us. Include the ServicePoint client number and date family was exited from the Shelter Diversion RRH program

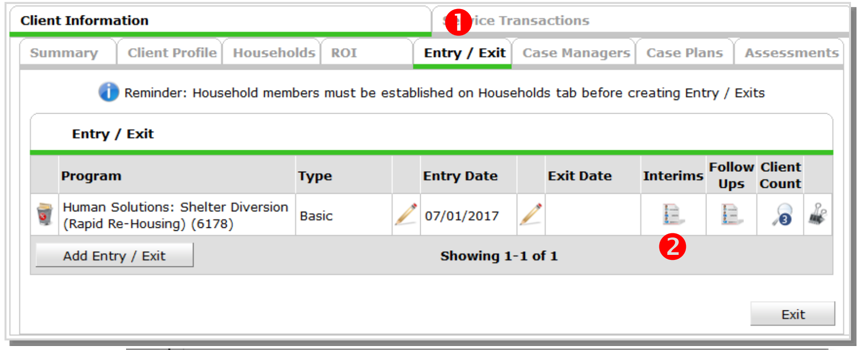
HOUSING PLACEMENT for SHELTER DIVERSION: <u>RAPID RE-HOUSING</u>

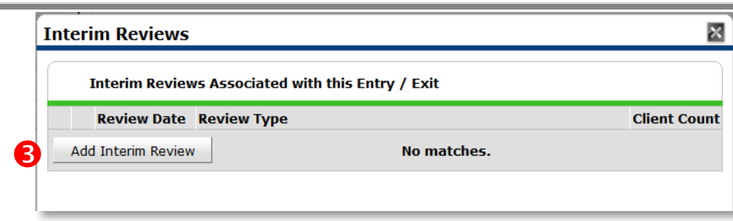
When a household has been placed in permanent housing, **update the Housing Move-in Date** using the following steps. Do NOT pencil back into the program entry to update this field.

❶ Click on the Entry/Exit tab in the <u>Head of Household's</u> profile

❷ Click on the icon in the 'Interims' column

❸ Click the 'Add Interim Review' button



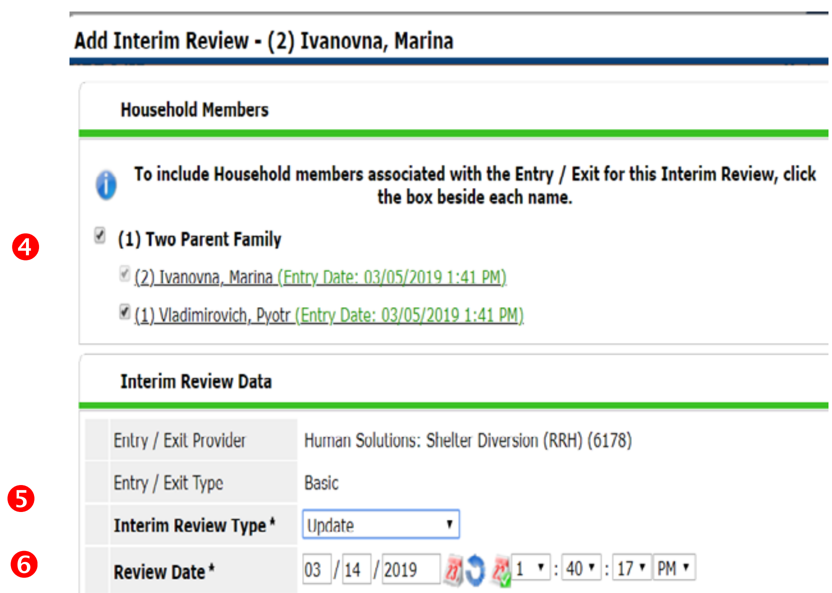


❹ Click to include all household members

❺ Choose 'Update' for Interim Review Type

❻ Set 'Review Date' to Housing Move-in Date

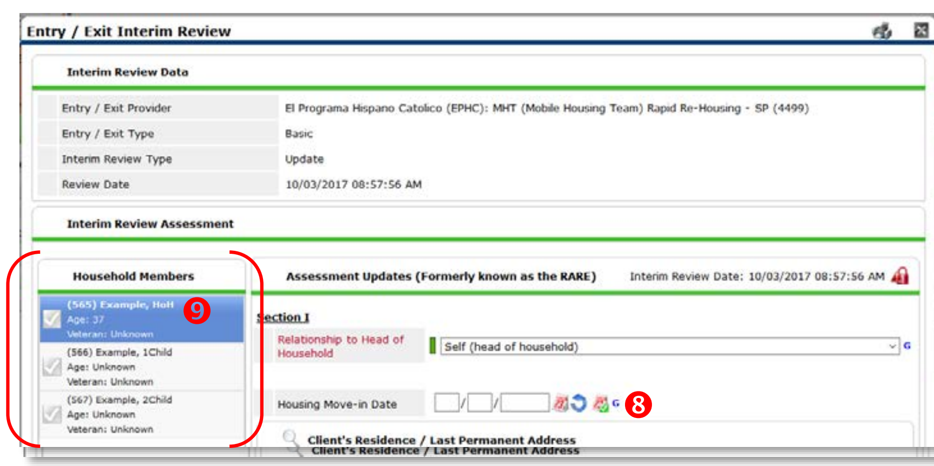
❼ Click 'Save & Continue'



❽ Fill in or update the 'Housing Move-in Date'

❾ Click on **each** household member and repeat step 8.

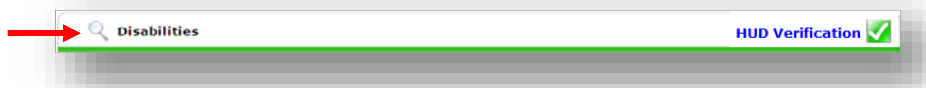
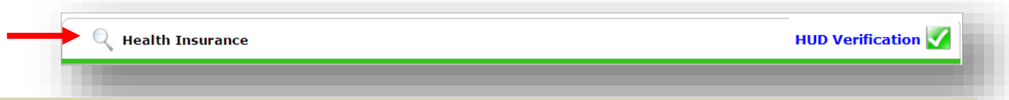
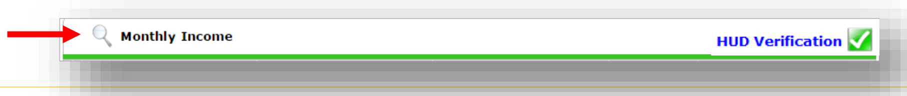
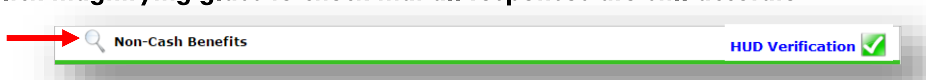
When steps above are Completed, click on 'Save & Exit.'



EXITING WINTER SHELTER DIVERSION HOUSEHOLDS IN SERVICEPOINT

Note: Due to the nature of shelter diversion services, it is possible that the Entry, Exit, and Service dates are all on the same dates. All families need to be exited from Winter Shelter Diversion when program ends (per Joint Office of Homeless Services)

See income instructions on pg. 14 on how to **end date** income and benefits records and **add** new ones.

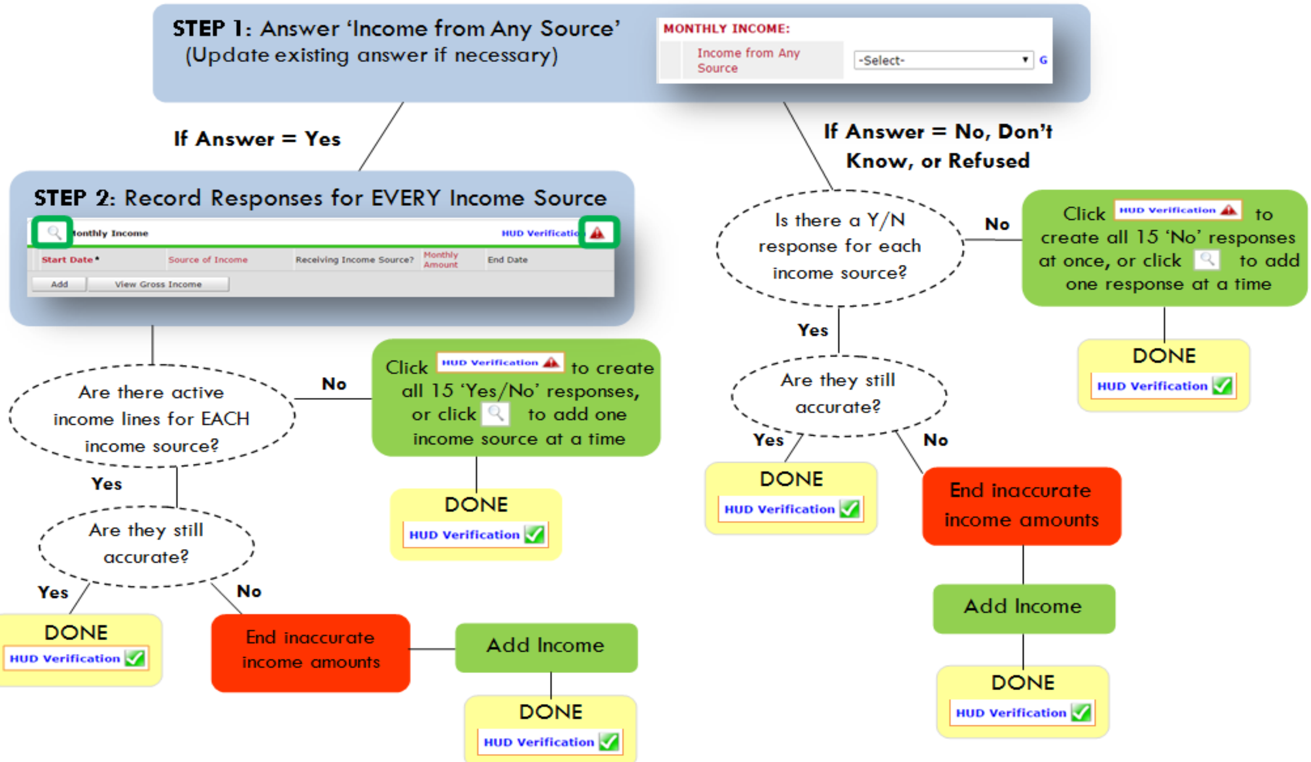
EXIT	**Answers from Entry will carry over. <u>Remember to update all responses that have changed</u>.**
Exit Date	Defaults to data entry date – change to Exit Date
Reason for Leaving	
Destination	
Verify, and if applicable, update the following questions for EACH Household Member	
Housing Move-in Date	Review. Leave blank or delete only if client is NOT in permanent housing at exit.
Relationship to Head of Household	
Does client have a disabling condition?	
Disabilities	**Click magnifying glass to check that all responses are still accurate** 
Covered by Health Insurance?	
Health Insurance	**Click magnifying glass to check that all responses are still accurate** 
Verify, and if applicable, update the following questions for Head of Household and All Adults	
Income from Any Source?	
Monthly Income	**Click magnifying glass to check that all responses are still accurate** 
Non-cash benefit from any source?	
Non-Cash Benefits	**Click magnifying glass to check that all responses are still accurate** 
Update the following questions when required by funder or administrator:	
Percent of Median Family Income	NOT required
Achieved case plan goals	NOT required
Client's Residence/Last Permanent Address	NOT required

RECORDING CLIENT INCOME

- Each client's record should store their entire income history. **Never update a client's income by deleting or writing-over the answers in an existing income record.**
- Each income source should have a Yes/No response. The same is true for Benefits, Disability and Health Insurance types.
- 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

Follow the process below to record client income at Entry, Interims, and Exit



ADDING INCOME

➊ 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

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

➌ Select Source of Income

➍ Monthly Amount = ($ amount from this source)

➎ Leave End Date blank

➏ 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.**

➊ Click the pencil next to outdated income

➋ Leave Start Date, Source, and Amount unchanged

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

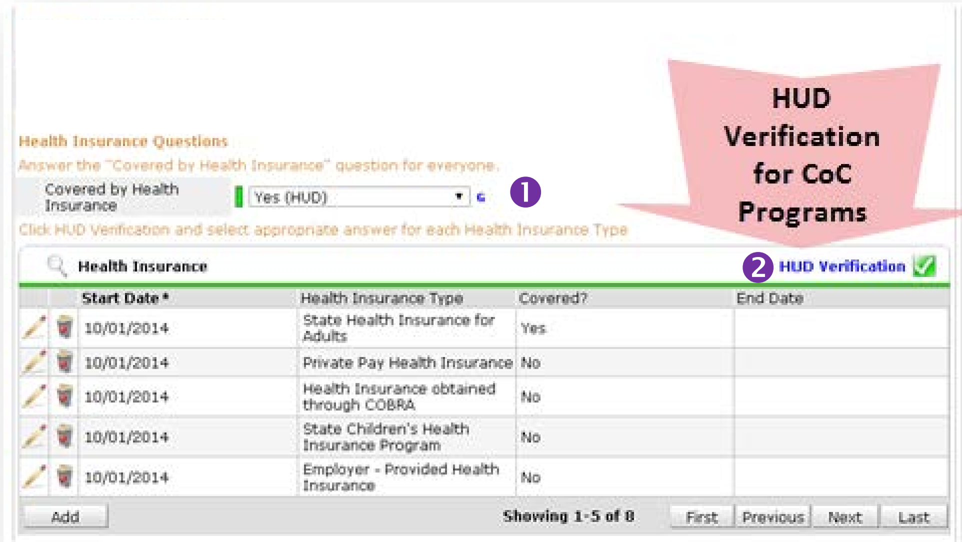
➍ Save and Exit

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

Answering HUD Verification Questions for New Participants

Your program's Entry may include the following questions:

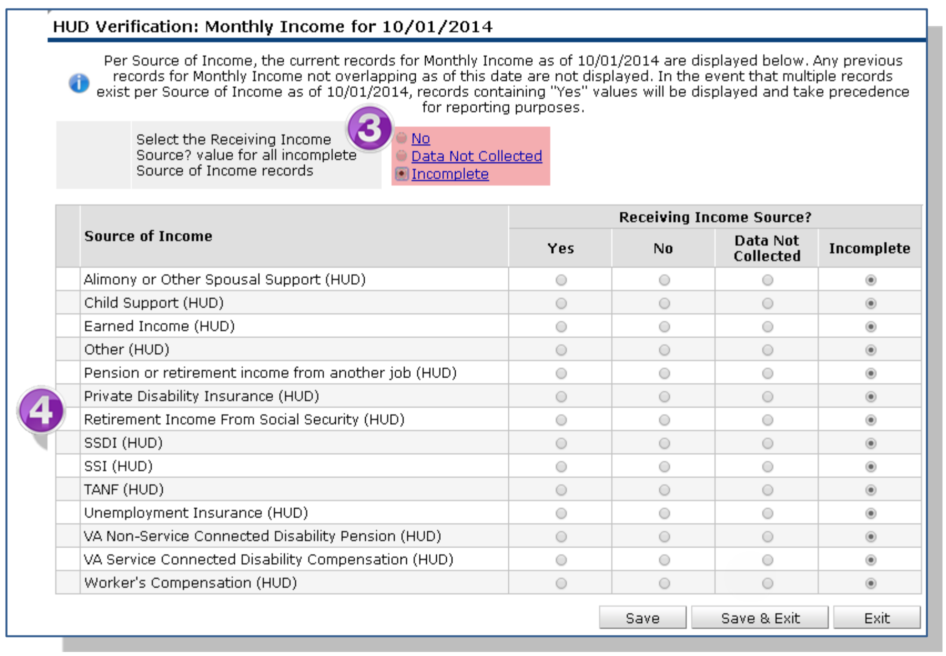
- Health Insurance
- Disabilities
- Monthly Income
- Non-Cash Benefits



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".

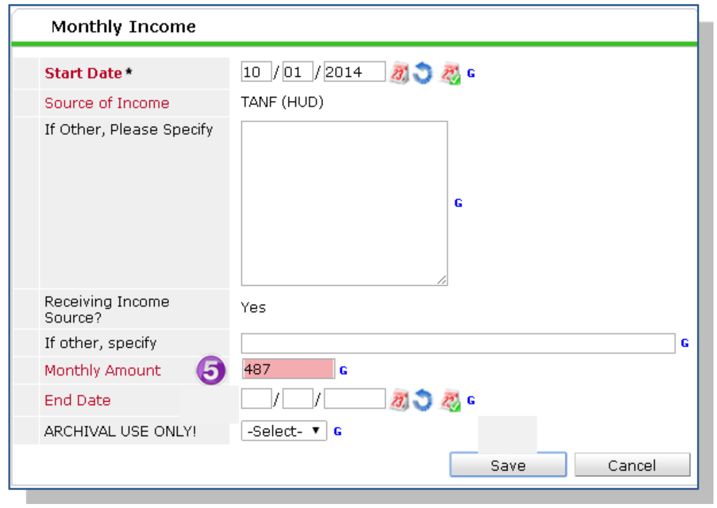
4. Carefully review the list of answers. If one of the answers applies to the participant, shift the answer on that one line to a "Yes".

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.

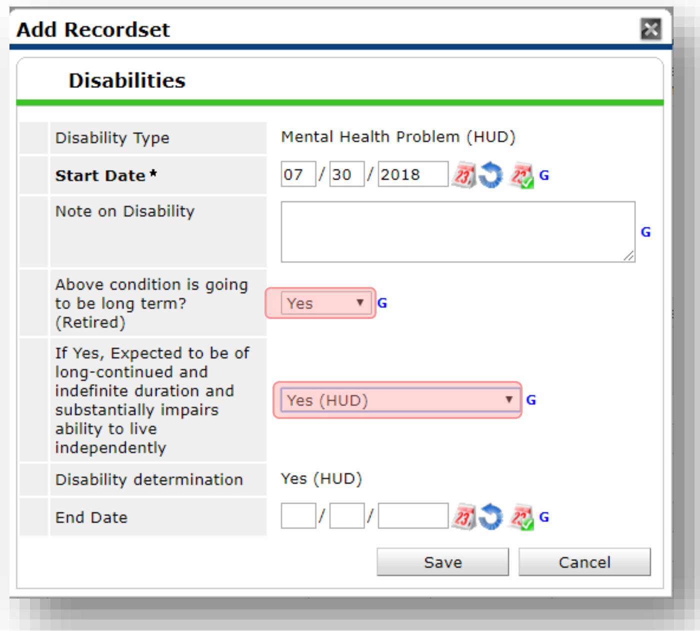


6. **DISABILITIES**: Enter “Yes”* in the 2 fields below the Note on Disability box.

***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.



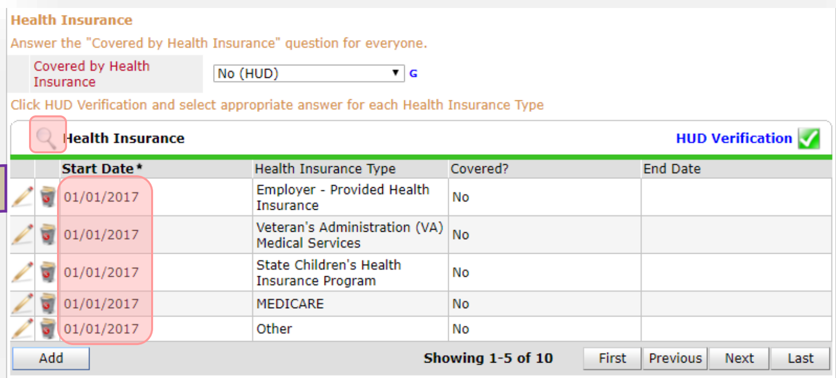
When you’re done answering questions for the Head of Household, remember to click **Save**, then scroll back to the top of the entry window and click on the names of any other household members included in the entry to complete their assessments.

Updating HUD Verification Questions for Existing Participants

If you are answering the HUD Verification questions for a participant who already exists in ServicePoint, there's a good chance that these type of questions (health insurance, disability, income, non-cash benefits) have already been answered at least once. ServicePoint will display all previously recorded answers as long as they are *ongoing*. This means that no one has entered an "End Date" for the answers you are seeing.

In order for you to update a HUD Verification question that has already been answered, you must enter an End Date for each previously recorded answer **that is no longer correct**. Then create a line for each **new** correct answer; new answers should be dated with the date of your new entry or annual update.

EXAMPLE: Last year, a survivor and her child completed the intake process for a program on 01/01/2017. A couple days later, her advocate created a program entry in ServicePoint using the intake date as the entry date. The advocate answered all of the questions required by ServicePoint in the program entry, including all four of the HUD Verification-type questions (Health Insurance, Disability, Monthly Income, and Non-Cash Benefits). At the time the advocate completed her intake, the participant did not have health insurance.


Health Insurance

Answer the "Covered by Health Insurance" question for everyone.

Covered by Health Insurance: No (HUD)

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

Health Insurance — HUD Verification

Start Date*	Health Insurance Type	Covered?	End Date
01/01/2017	Employer - Provided Health Insurance	No	
01/01/2017	Veteran's Administration (VA) Medical Services	No	
01/01/2017	State Children's Health Insurance Program	No	
01/01/2017	MEDICARE	No	
01/01/2017	Other	No	

Add — Showing 1-5 of 10 — First — Previous — Next — Last

Notice how each of the individual answers within the HUD Verification-type questions has a **Start Date** of 01/01/2017 (the same as the participants' entry date). Because the advocate recorded these answers from within the program entry dated 01/01/2017, the **Start Date** for each answer defaults to the entry date. **(Don't change it.)**

TIP: After completing a HUD Verification, click on the magnifying glass icon to expand the HUD Verification box and see all of your answers at once!


Show All Health Insurance Records

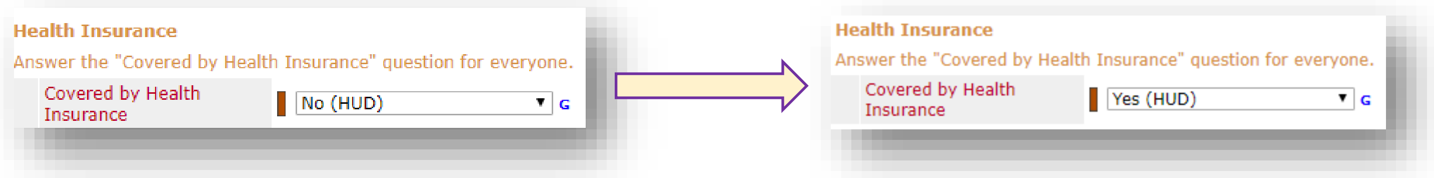
Health Insurance

Provider	Date Effective	Start Date	Health Insurance Type	Covered?	End Date
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Employer - Provided Health Insurance	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Veteran's Administration (VA) Medical Services	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	State Children's Health Insurance Program	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	MEDICARE	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Other	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Indian Health Services Program	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	State Health Insurance for Adults	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Private Pay Health Insurance	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Health Insurance obtained through COBRA	No	
Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	MEDICAID	No	

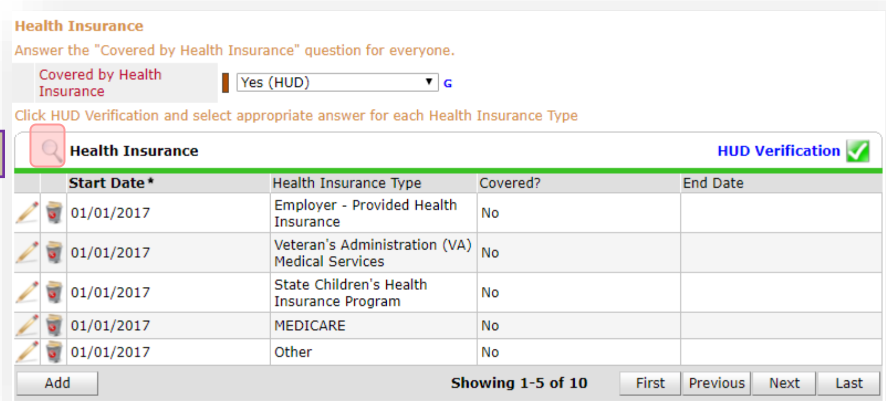
Add — Showing 1-10 of 10 — Exit

A year later, the same participant completed an intake for a new program. A couple days later, her advocate creates an entry for the new program, using the new intake date (01/01/2018) as the program entry date.

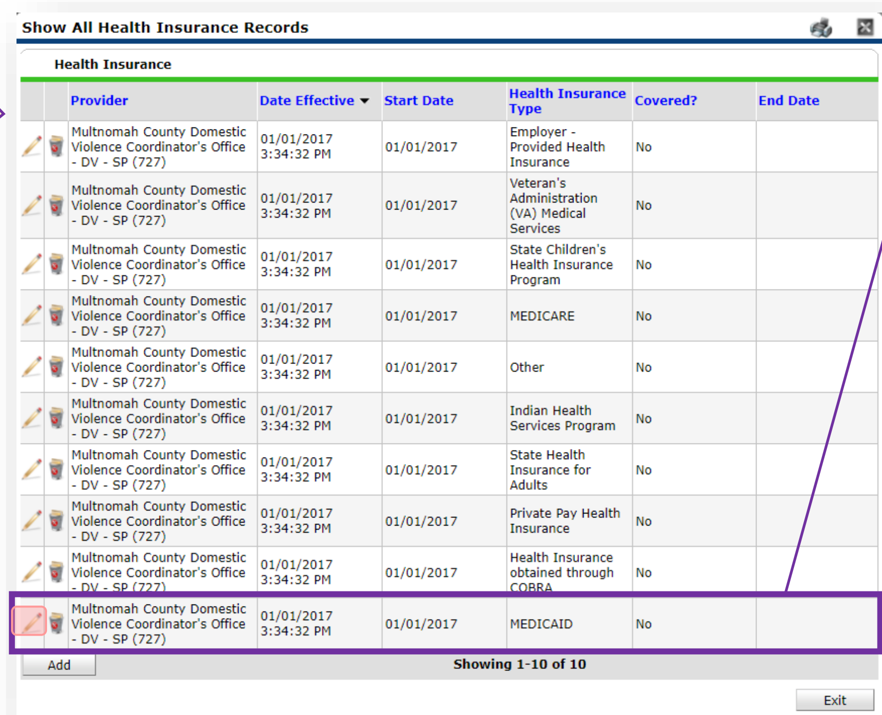
Sometime in the last year, the participant acquired health insurance through the Oregon Health Plan. Yay! The HUD Verification question about Health Insurance in the new program's entry pulls the "No" answer from the last time this question was answered, just like all other questions in ServicePoint. Flip the answer in the first part of the question from a "No" to a "Yes".



Click on the magnifying glass icon to review each of the individual answers within the HUD Verification.

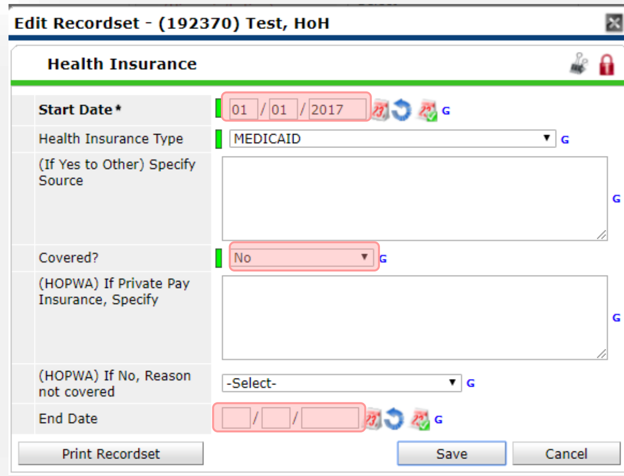


Tip: The **Start Date** shows the date of the entry wherein each answer was created.



OHP is recorded in ServicePoint as "MEDICAID", so this is the line that must be updated to reflect that the participant now has health insurance.

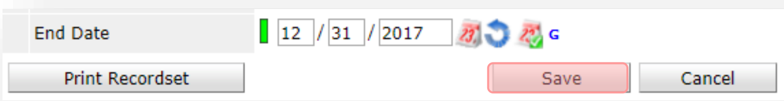
Click on the pencil icon in line with this answer to edit.



The **Start Date** tells you the date of the entry wherein this answer was created. When the answer was created on 01/01/2017, “No” *was* the correct answer to the question “Covered?” for “MEDICAID”.

But as of 01/01/2018, “No” is no longer a correct answer. Document this change by entering an **End Date** for the “No” answer. The date “No” stopped being correct is the date the participant first acquired health insurance; however, the participant isn’t expected to remember that date, and the advocate is not expected to record it.

But the advocate *does* know that on the date the participant completed the intake for the new program, she had OHP. The advocate is only responsible for reporting what is true as of the **Entry Date**. So, use the date of the day before the program entry as the **End Date.**



In this example, the **Entry Date** for the new program is 01/01/2018, so the **End Date** is 12/31/2017.

After entering an **End Date**, click **Save**.

The **End Date** now appears in line with the “No” for the MEDICAID answer.

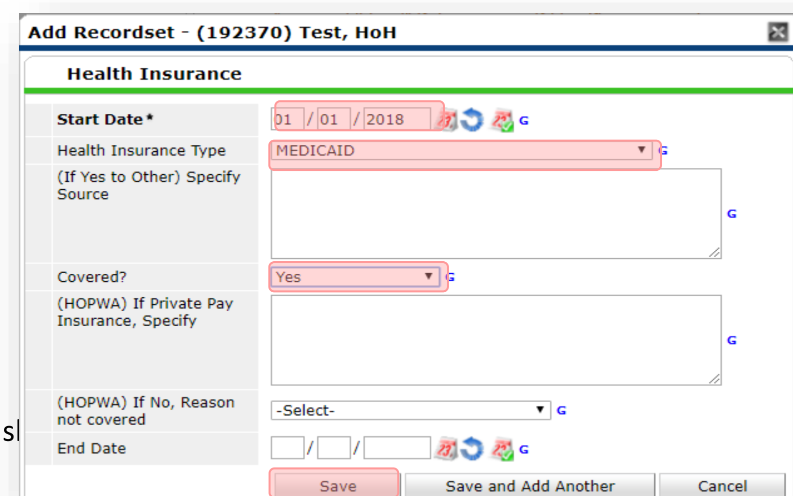
The next step is to document an ongoing “Yes” for MEDICAID as of the date of the new program entry. Click the **Add** button.

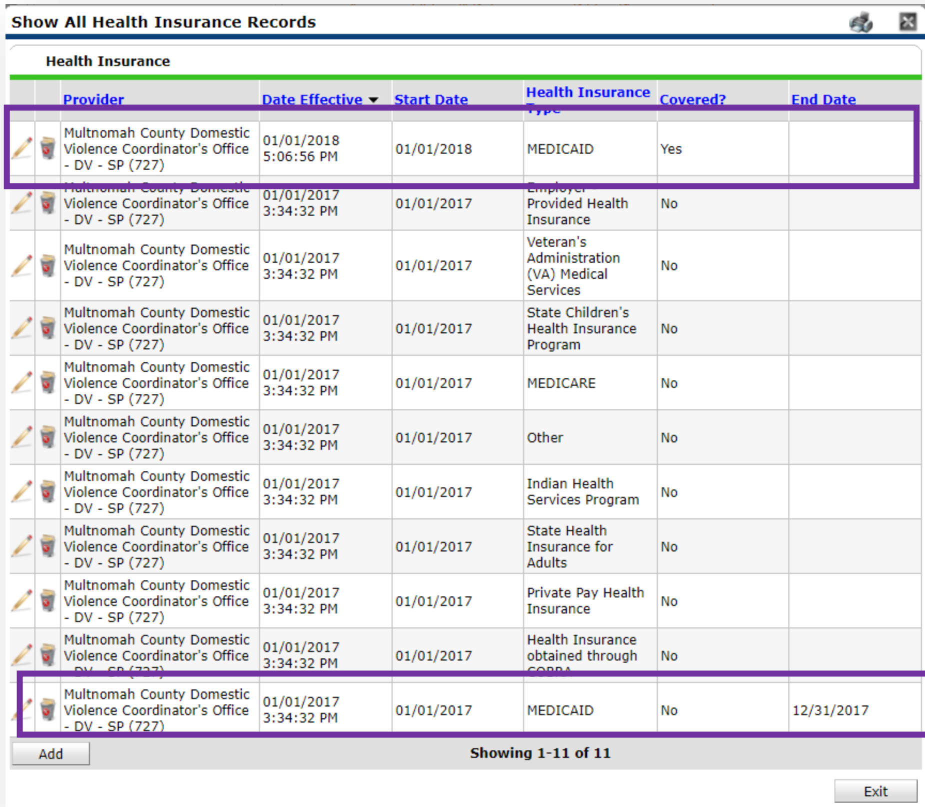
1. The **Start Date** defaults to the date of the Program entry. **(Don’t change it).**

2. Health Insurance Type is MEDICAID.

3. Covered? Is “Yes”.

LEAVE END DATE BLANK.
Click **Save.**
A correctly updated HUD Verification question sl





Show All Health Insurance Records

Health Insurance

	Provider	Date Effective	Start Date	Health Insurance Type	Covered?	End Date
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2018 5:06:56 PM	01/01/2018	MEDICAID	Yes	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Employer Provided Health Insurance	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Veteran's Administration (VA) Medical Services	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	State Children's Health Insurance Program	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	MEDICARE	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Other	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Indian Health Services Program	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	State Health Insurance for Adults	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Private Pay Health Insurance	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	Health Insurance obtained through COBRA	No	
	Multnomah County Domestic Violence Coordinator's Office - DV - SP (727)	01/01/2017 3:34:32 PM	01/01/2017	MEDICAID	No	12/31/2017

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Exit

A HUD Verification question that correctly captures a change in a participant's circumstances may have multiple lines with **End Dates**, but should have only one *ongoing* line per answer, whether "Yes" or "No".

When you're done answering entry assessment 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.