Alba Collaborative

SerivcePoint Handbook

CONTENTS

Adapted from Multnomah County ServicePoint Handbooks by New Avenues for Youth

Questions? Contact the New Avenues for Youth Data Team at qa@newavenues.org

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DATA MILESTONES – ALBA COLLABORATIVE

ENTRY
- Create client profile
- Record ROI
- Create entry in Alba provider

HOUSING PLACEMENT
- Check client in and out of ShelterPoint to record bed nights

CASE MANAGEMENT
- Record crisis CM start date
- Record community-based CM start date and agency

TRANSFER (if applicable)
- Record transfer date and transfer destination agency

EXIT
- Exit client from Alba provider

ENTER DATA AS (EDA)

- Follow the EDA instructions throughout this handbook to promote data sharing between Alba partner agencies
- Failure to follow EDA guidelines will lead to visibility concerns and reporting inaccuracies

Janet Harayama ⚙
Agency Admin

Mode: 👥 Shadow
👤 Enter Data As **1**
🌐 Connect To ART

Enter Data As Provider Search ✖

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID # 7254 **2**   Submit **3**

Provider Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z **All**

4

Provider	Level	Phone	Location	Last Updated
New Avenues for Youth: Youth Stability & Homeless Prevention (YSHP) (7254)	Level 6	Unknown	Portland, OR 97201	05/19/2020

Enter Data As (EDA)	
Client Profile & ROI	Your agency's Alba provider (7254/7256)
Project Start & Entry Assessment	Your agency's Alba provider (7254/7256)
Shelter Point Check In & Check Out	**New Avenues for Youth Alba provider (7254)**
Case Management Interim	Your agency's Alba provider (7254/7256)
Agency Transfer Interim	Your agency's Alba provider (7254/7256)
Exit & Exit Assessment	Your agency's Alba provider (7254/7256)

ENTER ALBA CLIENTS IN CLIENTPOINT

- **Always EDA as your agency's Alba provider (7254/7256)**
- Review shared data carried in from other HMIS providers and/or previous Alba enrollments
- Verify that responses to all questions are still accurate as of the Alba entry date
- If necessary, update responses as reported by the client
- **DO NOT create a new Alba entry record for clients transferring <u>in</u>**
- **Reference the entry record created by the Alba provider the client was transferred <u>from</u>**

1. CLIENT PROFILE	Every client must have these 3 questions answered in the Client Profile tab
Name Data Quality	Select appropriate response from dropdown
SSN Data Quality	Select 'Client Refused'
U.S. Military Veteran?	Select 'No'

2. ROI	Required to share data between Alba partner agencies
Provider	Select the default/login/top level agency provider **and** the Alba provider
Release Granted	Select 'Yes'
Start Date	Date client signs Alba ROI forms, preferably on or prior to Alba entry date
End Date	Date of 18th birthday
Documentation	Select 'Signed Statement from Client'
Witness	Enter "Alba"

3. PROJECT START	Required, except for clients transferring <u>in</u>
Provider	Select 'YSHP'
Type	Select 'Basic'
Project Start Date	Date of Alba intake; must be on or prior to first Alba housing placement
Project Start Time	Time of Alba intake; must be on or prior to first Alba housing placement
4. ENTRY ASSESSMENT	Required, except for clients transferring <u>in</u>
Date of Birth	Enter as reported by client
Gender	Select as reported by client or select 'Client Refused' if data not collected
Inclusive Identity	Click 'Add' to enter as many as self-identified by client

Primary Language	Select as reported by client
If Primary Language is Other, then Specify:	Leave blank, if answer above is not "Other"
Zip Code	Enter zip code of client's last permanent address

CHECK IN CLIENTS INTO SHELTERPOINT

- Client must be created in ClientPoint and have an Alba entry record before being checked into ShelterPoint

1. **Always EDA as the New Avenues for Youth Alba provider (7254)**
2. Click the ShelterPoint button from the left menu in ServicePoint
3. Click the "View All" tile from the ShelterPoint Dashboard
4. Locate an available bed, then click the green plus icon
5. Search for an existing Alba client
    a. If searching by name, select the green plus icon next to the client's name in the Client Results list (not shown)
    b. If searching by client ID, ServicePoint will automatically direct you to the following step
6. 'Date In' defaults to the current date and time; **change to actual check-in date and time**
7. Click "Save & Exit"

View Shelter Inventory

Provider *	New Avenues for Youth: Youth Stability & Homeless Prevention (YSHP) (7254)	Search	My Provider	Clear	Check Unit Availability
Unit List *	YSHP ▼			Submit	
Type	Transitional Housing				

Shelter Inventory Information

Unit List - YSHP

(4)

	Date In	Floor	Room	Bed	Hold	Client
🟢		1	1	Bed 001	Hold	EMPTY
🟢		1	1	Bed 002	Hold	EMPTY
🟢		1	1	Bed 003	Hold	EMPTY
🟢		1	1	Bed 004	Hold	EMPTY
🟢				Overflow (New)		EMPTY

Print Unit List

(5) Client Search

ℹ️ Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name				

Name Data Quality	-Select- ▼
Alias	
Social Security Number	___ - __ - ____
Social Security Number Data Quality	-Select- ▼
U.S. Military Veteran?	-Select- ▼
Exact Match	☐

Search   Clear   Add New Client With This Information

Client Number

Enter or scan a Client ID to check that Client in.

Client ID # _____ Submit

Unit Entry Data - (1) Case, Justin A

Date In *	**(6)** 02 / 05 / 2020 📅 🔄 📅 9 ▼ : 45 ▼ : 07 ▼ AM ▼
Unit Name / Number	1 / 1 / Bed 001

Save   **(7)** Save & Exit   Exit

CHECK OUT CLIENTS FROM SHELTERPOINT

1. **Always EDA as the New Avenues for Youth Alba provider (7254)**
2. Click the ShelterPoint button from the left menu in ServicePoint
3. Click the "View All" tile from the ShelterPoint Dashboard
4. Click the red minus icon next to the client's name to check out the client from their current placement
5. 'Date Out' defaults to the current date and time; **change to actual check-out date and time**
6. Select 'Reason for Leaving' (reference [definitions](#)) and 'Destination'
7. Click "Save & Exit"

View Shelter Inventory

Provider *	New Avenues for Youth: Youth Stability & Homeless Prevention (YSHP) (7254) [Search] [My Provider] [Clear] [Check Unit Availability]
Unit List *	YSHP ▼ [Submit]
Type	Transitional Housing

Shelter Inventory Information

Unit List - YSHP

	Date In	Floor	Room	Bed	Hold	Client
🔴	02/03/2020	1	1	Bed 001		(1) Case, Justin A
🟢		1	1	Bed 002	Hold	EMPTY
🟢		1	1	Bed 003	Hold	EMPTY
🟢		1	1	Bed 004	Hold	EMPTY
🟢				Overflow (New)		EMPTY

[Print Unit List]

Unit Exit Data - (1) Case, Justin A

Date Out *	02 / 05 / 2020 10 ▼ : 01 ▼ : 16 ▼ AM ▼
Unit Name / Number	Bed 001
Supplies Returned	⦿ Yes ○ No
Reason For Leaving *	-Select- ▼
Destination *	-Select- ▼

[Save] [Save & Exit] [Exit]

CASE MANAGEMENT & AGENCY TRANSFER

- Create an interim review (separately) when the client starts crisis case management, starts community-based case management, and/or is transferred to another Alba provider

SET UP AN INTERIM REVIEW IN SERVICEPOINT

- **Always EDA as your agency's Alba provider (7254/7256)**

1. Go to the Entry/Exit tab
2. Click the Interims form icon associated with the client's Alba record
3. Click 'Add Interim Review'
4. Complete the Interim Review Data
5. Click 'Save & Continue'

INTERIM REVIEW DATA

Interim Review Type	Select 'Update'
Review Date	Crisis case management start date, community-based case management start date, or agency transfer date

COMPLETE AN INTERM REVIEW ASSESSMENT IN SERVICEPOINT

- Click "Add" below each sub-assessment to complete data entry
- Click the pencil icon next to each sub-assessment to edit data (not shown)
- Click "Save" after entering data into each sub-assessment (not shown)
- Click 'Save & Exit' to close out of interim review assessment

YFS_YSHP Case Management and Agency Transfer	Only create one sub-assessment per Alba enrollment
YSHP Case Management	Leave field blank, if not applicable
Crisis Management Start Date	Date client is <u>first</u> assigned to a crisis case manager
Community Case Management Start Date	Date client is <u>first</u> assigned to a community-based case manager
Community Case Management Agency	Agency providing community-based case management to client
YSHP Agency Transfer	Alba provider transferring <u>out</u> the client is responsible for data entry
Agency Transfer Date	Date client is transferred <u>out</u> from Alba provider completing data entry
Transferred to	Alba provider client is being transferred <u>to</u>

EXIT ALBA CLIENTS FROM SERVICEPOINT

- **Always EDA as your agency's Alba provider (7254/7256)**
- Review shared data carried in from other HMIS providers and/or previous Alba enrollments
- Verify that responses to all questions are still accurate as of the Alba exit date
- If necessary, update responses as reported by the client
- **DO NOT exit clients from Alba when transferring <u>out</u>**
- Allow the new (transferred <u>to</u>) Alba provider to reference the current Alba entry record
- **The new Alba provider is responsible for exiting clients transferred <u>to</u> them, when appropriate**

EXIT	DO NOT exit clients from Alba when transferring <u>out</u>
Exit Date	Defaults to date of data entry; change if necessary
Reason for Leaving	Select from dropdown; reference [definitions](#) on following page
Destination	Select from dropdown
EXIT ASSESSMENT	DO NOT exit clients from Alba when transferring <u>out</u>
Was youth provided with family mediation support?	Select 'Not Applicable' if client did not receive case management services
Is youth able to identify at least one supportive adult outside of the YSHP system?	Select 'Not Applicable' if client did not receive case management services
Has youth increased their knowledge of how to stay safe?	Select 'Not Applicable' if client did not receive case management services
Did youth receive a resource referral and did they connect (with self-sufficiency services/programs, mental health/counseling, treatment, etc.)?	Select 'Not Applicable' if client did not receive case management services
Current school status at exit	Select from dropdown

REASON FOR LEAVING DEFINITIONS

- When exiting clients from Alba, select the reason for leaving only from the list provided below
- Do not select other reason for leaving options included in the dropdown list in ServicePoint

REASON FOR LEAVING	
Completed program	- Voluntary exit after receiving case management (crisis or community-based) and/or family mediation support - Referred to another provider - Aged out (turned 18)
Leaving for housing opportunity before completing program	Voluntary exit immediately following housing placement without ever meeting with crisis case manager (ex. youth placed overnight and leaves placement in the morning and does not go to meet with crisis case manager)
Non-compliance with program	Involuntary exit due to pattern of behavior (not criminal/violent in nature) in violation of program expectations and/or community standards (ex. smoking cigarettes or arriving late to placement, or engaged in unsafe or disruptive behavior in community or milieu during case management or drop-in)
Criminal activity/violence	Involuntary exit due to criminal and/or violent acts (ex. property damage or theft, violence towards placement or staff)
Needs could not be met	Involuntary exit due to non-participation in case management (ex. lack of engagement over 3 month period despite outreach performed by case managers)
Death	Death