Alba Collaborative ServicePoint Handbook

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Adapted from Multnomah County ServicePoint Handbooks by New Avenues for Youth Questions? Contact the New Avenues for Youth Data Team at <u>qa@newavenues.org</u> Last Revised: 06/30/2020

DATA MILESTONES – ALBA COLLABORATIVE



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



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

Client Information

Name

Alias Social Security SSN Data Quality U.S. Military Veteran?

Age

🧪 Client Record

Name Data Quality

- 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

Client Profile

Case, Justin A

- DO NOT create a new Alba entry record for clients transferring in
- Reference the entry record created by the Alba provider the client was transferred from

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'
Client - (1) Case, Justin A	

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 18 th birthday
Documentation	Select 'Signed Statement from Client'
Witness	Enter "Alba"

3. PROJECT START	Required, except for clients transferring in
Provider	Select 'YSHP'
Туре	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 in
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
🔍 Inclusive Identity (Race/Ethr	nicity/Origin)
Start Date *	Please add all that apply (Race/Ethnicity/Origin):
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"



SERVICEpoint*

Transmit Today's Check Out List



Provider *		New Avenu Youth Stab Prevention	ues for Youth: ility & Homeless (YSHP) (7254)	Search My	Provider	Clear	Check Un	it Availability
Jnit List *		YSHP			•		Submit	
уре		Transitional	l Housing					
Shelter I	nventory I	nformatio	n					
Unit List -	үзнр							
Date In	Floor		Room	Bed	Hold		Client	
	1		1	Bed 001	Hold		EMPTY	
	1		1	Bed 002	Hold	1	EMPTY	
	1		1	Bed 003	Hold		EMPTY	
	1		1	Bed 004	Hold	1	EMPTY	
				Overflow (Nev	v)	I	EMPTY	
Print Unit Li	st							
Client Sea	rch	FI	rst	Middle	Please	Search the ast	e System before a	dding a New Suffix
Client Sea	rch	Fi	irst	Middle	Please	Search the	System before a	dding a New Suffix
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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"

Mode:	Shadow	
	Lenter Data As New Avenues for	Youth
U	🌯 Connect To ART	2

SERVICEpoint*



Transmit Today's Check Out List

View Shelter I	nventory		
Provider *	New Avenues for Youth: Youth Stability & Homeless Prevention (YSHP) (7254)	Search My Provider Cle	ar Check Unit Availability
Unit List *	YSHP	T	Submit
Туре	Transitional Housing		
ShelterPoint D	Dashboard	and the second	

View All

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Provider *	N Ye Pi	ew Avenues for Youth: outh Stability & Homeless revention (YSHP) (7254)	s Search My Pro	vider Clea	r Check Unit Availability
Init List *	Y	SHP	۲		Submit
уре	Tr	ansitional Housing			
Shelter In	ventory Info	rmation			
Unit List - Y	/SHP				
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 Lis	t				
Unit Exit E	Data - <mark>(1)</mark> Ca	se, Justin A			
Date Out *	5	2 / 05 / 2020 23	3 20 ▼: 01 ▼: 16	AM Y	
Jnit Name / N	umber B	ed 001			
Supplies Retur	ned	● <u>Yes</u> ○ <u>No</u>			
Reason For L	eaving *	Select-	T		
Destination *		Select-			

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'

(1) Case, Justin A Release of Information: None											
ent Information					Servio	ce Transactions					
Summary C	lient Profile) i	Households		ROI		Entry /	Exit 1	Case Manag	ers	
		🕧 Reminder: I	Household me	embers must be	established on	Households tab before c	reating Entry / E	xits			
Entry / Exit											
Program					Туре	Projec	t Start Date	Exit Date	Interim	Follow (lient
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Interim Reviews Associated wi	th this Entry / Exit										
Review Date Review Type			С	lient Count							
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Review Date start date, or agency tran

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 first assigned to a crisis case manager
Community Case Management Start Date	Date client is first 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 out the client is responsible for data entry
Agency Transfer Date	Date client is transferred out from Alba provider completing data entry
Transferred to	Alba provider client is being transferred to

Interim Review Data		
Entry / Exit Provider	New Avenues for Youth: Youth Stability & Homeless Prevention (YSHP) (7254)	
Entry / Exit Type	Basic	
Interim Review Type	Update	
Review Date	02/05/2020 10:33:15 AM	
Interim Review Assessme	ent	
Household Members	Interim Review D YFS_YSHP Case Management and Agency Transfer 02/05/2020 10:3)ate: 3:15
(1) Case, Justin A		AM
(1) Case, Justin A Age: 20 Veteran: No (HUD)	YSHP Case Management	AM
(1) Case, Justin A Age: 20 Veteran: No (HUD)	YSHP Case Management Crisis Management Community Case Management Start Date Community Case Management Agency: IGNORE	AM
(1) Case, Justin A Age: 20 Veteran: No (HUD)	YSHP Case Management Crisis Management Crisis Management Start Date Community Case Management Start Date Community Case Management Start Add No matches.	AM
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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 out
- Allow the new (transferred to) Alba provider to reference the current Alba entry record
- The new Alba provider is responsible for exiting clients transferred to them, when appropriate

EXIT	DO NOT exit clients from Alba when transferring out
Exit Date	Defaults to date of data entry; change if necessary
Reason for Leaving	Select from dropdown; reference <u>definitions</u> on following page
Destination	Select from dropdown
EXIT ASSESSMENT	DO NOT exit clients from Alba when transferring out
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