

Oklahoma City CoC

Coordinated Intake & By Name List Policies and Procedures

Background

What is Coordinated Intake?

Coordinated intake (also known as coordinated entry) is a consistent, community wide process to match people experiencing homelessness to community resources that are the best fit for their situation. In a community using coordinated intake, homeless individuals and families complete a standard assessment survey that identifies the best type of services for that household.

Participating programs accept referrals from the system, reducing the need for people to traverse the city seeking assistance at every provider separately. When participating programs do not have enough space to accept all referrals, people are prioritized for services based on vulnerability.

HUD Requirement

Under the interim rule for U.S. Department of Housing and Urban Development's (HUD) Continuum of Care (CoC) program, each Continuum of Care (CoC) must establish and operate a centralized or coordinated assessment system (24 CFR 587.7 (a)(8)). HUD defines a centralized or coordinated assessment system as "a centralized or coordinated process designed to coordinate program participants' intake assessment and provision of referrals. A centralized or coordinated assessment system covers the geographic area, is easily accessed by individuals and families seeking housing or services, is well advertised, and includes a comprehensive and standardized assessment tool" (24 CFR 578.3)

Participation in the coordinated intake system is required for HUD CoC grantees.

The Coordinated intake system described in this manual is designed to meet the requirements of the HEARTH Act, under which, at a minimum, Continuums of Care must adopt written standards that include:

- i. Policies and procedures for providing an initial housing assessment to determine the best housing and services intervention for individuals and families;
- ii. A specific policy to guide the operating of the centralized or coordinated assessment system on how its system will address the needs of individuals and families fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, or stalking, but who are seeking shelter services from non-victim service providers;
- iii. Policies and procedures for evaluating individuals' and families' eligibility for assistance;
- iv. Policies and procedures for determining and prioritizing which eligible individuals and families will receive transitional housing assistance;
- v. Policies and procedures for determining and prioritizing which eligible individuals and families will receive rapid rehousing assistance;

- vi. Policies and procedures for determining and prioritizing which eligible individuals and families will receive permanent supportive housing assistance.

Systems Change

The implementation of the Coordinated Intake System necessitates significant, community-wide change. To help ensure that the system will be effective and manageable for homeless persons and persons at-risk of homelessness and for the housing and service providers tasked with meeting their needs, a group of stakeholders was involved in its design. In addition, particularly during the early stages of implementation, The City of Oklahoma City Continuum of Care anticipates adjustments to the processes described in this manual. An evaluation of the Coordinated Intake System will occur at least annually or as needed and will provide ongoing opportunities for stakeholder feedback. This process will be initiated by the Coordinating Entity and will involve partner agencies. The Coordinating Entity will be responsible for monitoring the Coordinated Intake System.

Benefits of Coordinated Intake

Coordinated intake will benefit our community by:

- Providing a clearer and more streamlined path to accessing assistance for people who are currently or at imminent risk of experiencing homelessness;
- Reducing the need for people to contact to multiple housing programs and fill out multiple applications to join waitlists. Coordinated intake will assess people for all participating permanent housing programs at the same time;
- Prioritizing scarce housing resources for the most vulnerable; and
- Improved data collection and quality that supports data-driven decision making based on client-level and system-wide needs.

Overview

Journey Home OKC is an initiative that consists of more than 40 nonprofits, private businesses and government agencies that work together to provide housing and case management supports for chronically homeless individuals and veterans. This group is the successor to the successful 100,000 Homes Campaign, which helped get more than 290 chronically homeless people off the streets and into housing in Oklahoma City in 2013 and 2014. Since January 2015, the group has been focused on reaching and maintaining functional zero in regards to chronic and veteran homelessness.

The group uses a housing first philosophy, which places the most vulnerable people in the community in housing first, and then wraps them around with case management to address their needs and the problems that are causing them to be unsheltered people.

For definitions of many terms used throughout this manual, refer to Appendix A.

Disclaimer

The Coordinated Intake System for Journey Home OKC uses an assessment process which triages for the

best housing intervention (Permanent Supported Housing or Rapid Rehousing) and determines prioritization for housing and case management based on vulnerability. This is not a guarantee that the individual will meet the final eligibility requirements for, or receive a referral for, a particular housing option. The tool used by the Coordinated Intake System for assessment is the evidence-based VI-SPDAT (Vulnerability Index Service Prioritization Decision Assistance Tool).

Release of Information

All clients must sign a HIPPA-compliant release of information prior to the assessment process. This release of information allows client data to be shared between Journey Home OKC participant organizations in Service point HMIS.

Clients Fleeing Domestic Violence: No agency will enter any information for any client fleeing domestic violence into HMIS so long as that client is considered to be in danger from an abuser.

Client Photos: Photos should be taken at the time of the assessment, but are not required. Photos are encouraged for by-name and by-face identification for outreach. If a photo is taken and uploaded into HMIS, a photo release must be signed by the client prior to the photo being taken.

Roles and Expectations

Coordinating Entity: The City of Oklahoma City Continuum of Care is the designated Coordinating Entity. The Coordinating Entity is responsible for the day-to-day administration of the Coordinated Intake System, including but not limited to the following:

- Designing and delivering training at least annually to all key stakeholder organization but not limited to the required training for sub recipients;
- Ensuring pertinent information is entered into HMIS for monitoring and tracking the process of referrals including vacancy reporting and completion of assessments;
- Managing manual processes as necessary to enable participation in the Coordinated Intake System by providers not participating in HMIS;
- Designing and executing ongoing quality control activities to ensure clarity, transparency, and consistency in order to remain accountable to clients, referral source, and homeless service providers throughout the coordinated intake process;
- Periodically evaluating efforts to ensure that the Coordinated Intake System is functioning as intended;
- Making periodic adjustments to the Coordinated Intake System as determined necessary;
- Ensuring that evaluation and adjustment processes are informed by a broad and representative group of stakeholders;
- Update the Coordinated Intake & By Name List Policies and Procedures;
- Leading periodic evaluation efforts to ensure that the Coordinated Intake System is functioning as intended; such evaluation efforts shall happen at least annually.

- Leading efforts to make periodic adjustments to the Coordinated Intake System as determined as necessary; such adjustments shall be made at least annually based on findings from evaluation efforts.
- Ensuring that the Coordinated Intake System process is informed by a broad and representative group of stakeholders
- Ensuring that the coordinated Intake System is updated as necessary to maintain compliance with all federal statutory and regulatory requirements.

Journey Home OKC Program Director: The Journey Home OKC Program Director is a Homeless Alliance employee who works in coordination with Journey Home OKC partner agencies to address the broad array of client needs through referral to providers of necessary services.

- Serves as the contact for partner agency staff and case managers and for clients when case managers are not available;
- Serves as the contact between Community Solutions and the community;
- Convenes and manages CCMSA staffing;
- Maintains quality assurance of the program;
- Coordinates the housing placement and case management of vulnerable chronically homeless persons via the by-name list;
- Maintains and updates the by-name list for individuals experiencing chronic homelessness and veterans;
- Reports out housing placements via HMIS and Monthly Housing Placement Reports from partner agencies for the community to the Zero: 2016 Campaign each month.

Partner Agencies: All recipients of ESG and CoC funding are considered partner agencies and are responsible for the following:

- Ensuring that all households experiencing homelessness and at-risk of homelessness have prompt access to the Centralized Intake System and those assessments are administered in a safe, welcoming environment.
- All Permanent Supportive Housing and Rapid Re-housing programs are responsible for reporting vacancies to the Journey Home OKC Program Director in compliance with the protocols described in this manual.
- All programs that receive a referral from the Coordinated Intake System are responsible for responding to that referral and participating in case conferences, in compliance with the protocols described in this manual.

HMIS Administrator: The HMIS Administrator is responsible for the administration of the HMIS software and providing technical assistance to participating agencies.

Target Population

The Coordinated Entry System is open to all households who are homeless and seeking services. The system has a ‘no wrong door’ philosophy, which means that clients can enter the system through any partner agency including 211. The system uses vulnerability to rank applicants with the most vulnerable households being ranked at the top of the list.

System Overview & Workflow

Ideally, everyone who touches the CIS would have completed a VI-SPDAT. Partner agencies can look up a client in HMIS to see if they have a VI-SPDAT on file. Individual agencies do not keep their own priority lists or wait lists. All prioritization is done on the by-name list.

Connecting to the Coordinated Entry System-Step 1: Client is administered a VI-SPDAT and gives Release of Information; this can happen either at a partner agency, during outreach, or by calling 211.

Client is added to appropriate By Name List-Step 2: The client is added to the appropriate by name list as soon as possible (usually within about a week). For more information about how clients are added to specific By Name Lists, see the By Name List section below.

Clients are prioritized for housing-Step 3: Clients are prioritized on By Name Lists based on their VI-SPDAT scores. As case management and housing resources become available, clients are referred from the list to the available resources. As clients move to the top of the list, they are staffed and chronicity is verified. During the early stages of case management, case managers may have to do some work to prepare the client for housing such as getting IDs, proof of income, homeless verification, transporting the client, etc.

Referral-Step 4: Once the client has been matched to resources, the case manager takes over the case and reports updates during the appropriate case conferencing meetings (CCM-SA or VCCM). If the client is being housed through Journey Home OKC, then the Journey Home OKC housing referral must be sent to the Journey Home OKC Program Director as well as OCHA. OCHA delivers regular reports to the Journey Home OKC Program Director showing which referrals have been recently processed. Clients may not be referred for Journey Home OKC Housing if they have not been staffed for eligibility during CCM-SA or VCCM.

Housing Navigation and Placement-Step 5: Case managers assist the client in navigating the housing market. Once a placement is found, the case manager assists the client during move-in and makes appropriate referrals for furniture, deposit assistance, utility assistance, etc. The case manager is expected to follow-up with the client regularly after housing has been secured and after move-in, in order to make sure that client's needs are being met. This includes visits to the client's home at least monthly.

Discharging-Step 6: When a case manager and client agree that the services are no longer needed and that the client is able to maintain the housing on his/her own, then the case manager may recommend the client for program discharge during regular case conferencing. The recommendation should be accompanied by justification of self-sufficiency. The preferred measure of client acuity is the Full SPDAT assessment.

Marketing and Advertising

As needed, the Coordinating Entity and/or the Journey Home OKC partners will send and/or report on information and updates regarding the Coordinated Entry System to stakeholders and the general public.

By-name List

The by-name list is driven by VI-SPDAT scores and is the main way by which clients are prioritized for housing and case management in the community.

Chronic: The chronic by-name list is maintained by the Journey Home OKC Program Director. Clients are added to the list weekly as their VI-SPDATs are entered into HMIS. Chronic status is not verified at the time of entry into the system, but is verified on a case by case basis as clients come up next on the list. Clients are moved from the list to housing and case management services during the CCM-SA meeting. Clients remain on the by-name list until they are housed or become inactive. Inactive status is defined as no known contact with any service provider in the community for 6 months. When a client is moved to inactive, he/she is not deleted from the list; clients can change from inactive to active anytime they access services; this will not affect their position on the list. If clients remain active on the list for an entire year, the Coordinated Intake System will make an effort to update the VI-SPDAT score in order to note any changes in vulnerability, and therefore update the client's position on the list. Eligibility is flagged at VI-SPDAT scores that recommend assessment for Permanent Supportive Housing/Housing First; if the community has housed all individuals that are above this threshold, then they may prioritize lower scores.

Veteran: The veteran by-name list is maintained by the Journey Home OKC Program Director. Clients are added to the list as their VI-SPDATs are entered in the Coordinated Intake System via outreach contacts, partner agencies, and 211. All new VI-SPDATs are brought to the weekly VCCM meeting as potential referrals. Each referral is staffed during VCCM, and each referral is assigned to a representative from partner agencies for follow-up. Clients remain on the By Name List until they are housed or become Inactive. Inactive status is defined as no known contact with any service provider in the community for 6 months. When a client is moved to inactive, he/she is not deleted from the list; clients can change from inactive to active anytime they access services; this will not affect their position on the list. If clients remain active on the list for an entire year, the Coordinated Entry System will make an effort to update the VI-SPDAT score in order to note any changes in vulnerability, and therefore update the client's position on the list.

Youth: The youth by-name list is maintained by Be the Change. Youth who qualify as chronically homeless as defined by HUD are staffed for eligibility for housing through Journey Home OKC.

Family: The family by-name list is not currently required by the CoC. Partner agencies are encouraged to prioritize families for rapid rehousing and permanent supported housing by using the VI-F-SPDAT and maintaining a priority list.

Coordinated Case Management

This is the model of case conferencing that we use in the community. All participating agencies attend regularly and are engaged in the case conferencing.

Chronic: CCM-SA: (Coordinated Case Management-Single Adults) This meeting occurs every other Monday at 2 p.m. unless otherwise scheduled. It is held at the WestTown Resource Center, and is convened by the Journey Home OKC Program Director. All partner agencies are required

to attend. During this meeting, agency representatives staff client cases, and new clients get assigned to case management and housing resources.

Veteran: VCCM: (Veteran's Coordinated Case Management) This meeting occurs every Thursday at 9 a.m. at the WestTown Resource Center unless otherwise scheduled. It is convened by the VA. All partner agencies that serve veterans are required to attend. During this meeting, agency representatives staff client cases, and new clients get assigned to case management and housing resources.

Youth: Youth are staffed using a coordinated case management model. There are housing and case management resources unique to youth and children that are taken into consideration when going through the youth by-name list. Youth that qualify as chronically homeless under the HUD definition are given consideration for Journey Home OKC placements.

Family: Families are staffed using a coordinated case management model. At intake, families are screened for eligibility using the VI-F-SPDAT and are then recommended for either rapid re-housing or PSH.

Special Cases

Inaccurate VI-SPDAT: Occasionally a case will arise where the case manager or referring agent does not believe that the VI-SPDAT score is consistent with the actual vulnerability of the client. In these cases the case manager or referring agent may advocate for the client to receive higher during the regular case conferencing. All present at the case conferencing must reach a consensus in granting the priority to the client in lieu of the VI-SPDAT score. These cases are then worked into available housing and case management spots and follow the steps detailed in the System Overview and Workflow section of these policies and procedures.

No VI-SPDAT: Sometimes clients do not want to do the VI-SPDAT; this does not disqualify them from the by-name list or potential housing opportunities. In the event that a client does not have a VI-SPDAT, he/she can be added to the by-name list as long as we have a release of information. These people will also be prioritized for coordinated outreach in the hope that over time, continual contacts will lead to increased openness to engaging in services and completing the VI-SPDAT.

Client Rights

Client Rights may be based on partner agency client rights and grievance policies, which may vary from agency to agency. Appeals regarding eligibility decisions also occur at the agency level.

Client Choice: Clients may decline a referral because of program requirements that are inconsistent with their needs or preferences. In the event that a client declines a referral, the Coordinated Intake System will try to come up with alternative options for the client. This may involve additional wait time for the client.

Fair Housing Act: Clients are protected by the Fair Housing Act, which protects from discrimination when people are renting, buying, or securing financing for any housing. The prohibitions specifically cover discrimination because of race, color, national origin, religion, sex,

disability and the presence of children. For more information regarding Fair Housing Act or to address complaints or violations, clients and/or case managers can visit the website at the link below or reach out to Legal Aid Services of Oklahoma, Inc.
http://portal.hud.gov/hudportal/HUD?src=/program_offices/fair_housing_equal_opp/FHLaws/yourrights

Evaluating and Updating Policies and Procedures

The implementation of the Coordinated Intake System necessitates significant, community-wide change. To help ensure that the system will be effective and manageable for homeless and at-risk households and for the housing and service providers tasked with meeting their needs, particularly during the early stages of implementation, the Oklahoma City Continuum of Care anticipates adjustment to the processes described in this manual. To inform those adjustments, the Coordinated Intake System will be periodically evaluated, and there will be ongoing opportunities for stakeholder feedback, including but not limited to work groups convened and managed by the Continuum of Care staff.

Appendix A: Definitions

Definitions

Terms used throughout this manual are defined below:

Area Median Income: Refer to the following link for the most current AMI limits:

<https://www.huduser.gov/portal/datasets/il.html>

At imminent risk of becoming homeless (HUD Definition Category 2): Individual or family who will imminently lose their primary nighttime residence, provided that: (i) Residence will be lost within 14 days of the date of application for homeless assistance; (ii) No subsequent residence has been identified; and (iii) The individual or family lacks the resources or support networks needed to obtain other permanent housing

By-Name List: The Oklahoma City CoC has four separate by -name lists that are updated and maintained by partner agencies; these are literally names that identify people experiencing homelessness in the community by name and prioritize housing placements and case management resources based on VI-SPDAT scores. The subpopulations included in those by-name lists are as follows: Chronic, Veteran, Youth, and Family. These by-name Lists are the mechanism by which clients are moved from prescreen for vulnerability to case management and housing placement. The list is updated based on VI-SPDATs that have been inputted at any agency in the community and entered into HMIS. The list is managed based on vulnerability rather than the entry date to the coordinated entry system. VI-SPDAT scores are ranked such that clients are served in order of vulnerability. It is important to note that the family by-name list is not currently being maintained community-wide; agency participation in the family by-name list is preferred but not required. It is also important to note that apart from the family list, there is only one list per population for the entire community; individual agencies do not maintain their own priority lists or waiting lists. Prioritization for all placements through partner agencies should come from the appropriate by-name list. Since all prioritization occurs via this list it is also referred to as the 'Master List'.

Chronically Homeless (HUD Definition): To be considered chronically homeless, a person must have a disability and have been living in a place not meant for human habitation, in an emergency shelter, or transitional housing for the last 12 months continuously or on at least four occasions in the last three years where those occasions cumulatively total at least 12 months

CoC: The Oklahoma City Continuum of Care Committee (OKC CoC) is a committee comprised of citizens and non-profit service providers interested in working on community homeless and poverty issues. The OKC CoC Committee provides oversight in coordinating competitive and formula programs specific to serving the City's homeless population. This group also makes funding recommendations for the City's Social Services grant. The HUD Continuum of Care Grant is an annual competitive grant that builds on the previous year's performance in developing specialized housing with supports for those who are homeless, chronically homeless and have significant disabilities.

Community Solutions: Community Solutions is a national organization that works with communities across the country to help them become better, more adaptive problem solvers so they can tackle complex

challenges as they emerge. Their main goals are to help communities end homelessness and ensure that poverty never follows families beyond a single generation.

Coordinated Outreach: This is a monthly meeting during which community partners meet to discuss outreach strategies as well as clients who need to be outreached.

Disability (HUD Definition): A physical, mental, or emotional impairment, including impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that is expected to be long-continuing or of indefinite duration, substantially impedes the individual's ability to live independently, and could be improved by the provision of more suitable housing conditions.

Fleeing domestic abuse or violence (HUD Definition Category 4): Any individual or family who: (i) Is fleeing, or is attempting to flee, domestic violence; (ii) Has no other residence; and (iii) Lacks the resources or support networks to obtain other permanent housing

Functional Zero: At any point in time, the number of people experiencing sheltered and unsheltered homelessness in a community will be no greater than the current monthly housing placement rate for people experiencing homelessness.

HMIS: (Homeless Management Information System) This is the database used to record and track client-level information. HMIS ties together homeless service providers within a community to help create a more coordinated and effective housing and service delivery system. The City of Oklahoma City's HMIS is staffed by a contracted administrator. The software provider is Bowman Systems, Service Point.

Homeless Under other Federal statutes (HUD Definition Category 3): Unaccompanied youth under 25 years of age, or families with Category 3 children and youth, who do not otherwise qualify as homeless under this definition, but who: (i) Are defined as homeless under the other listed federal statutes; (ii) Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the homeless assistance application; (iii) Have experienced persistent instability as measured by two moves or more during in the preceding 60 days; and (iv) Can be expected to continue in such status for an extended period of time due to special needs or barriers

Housing First: This model provides housing first, and then combines that housing with supportive treatment services in the areas of mental and physical health, substance abuse, education, and employment. Housing is provided in apartments scattered throughout a community.

Journey Home OKC: This is the name of Oklahoma City's program that houses homeless veterans and people experiencing chronic homelessness and provides them with wraparound case management services. Journey Home OKC is comprised of over 40 government, non-profit, and faith-based organizations that work together to end veteran and chronic homelessness.

Journey Home OKC Housing Referral: The Oklahoma City Housing Authority (OCHA) reserves their turnover vouchers for chronically homeless individuals. These are Journey Home OKC Vouchers; they may be accessed only through CCM-SA, and a Journey Home OKC

Referral must be completed. Similarly applications for public housing that are seeking Journey Home OKC prioritization must be accessed through CCM-SA and appropriate referral.

Literally Homeless (HUD Definition Category 1): Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning: (i) Has a primary nighttime residence that is a public or private place not meant for human habitation; (ii) Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or (iii) Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution

OCHA: The Oklahoma City Housing Authority is a partner to Journey Home OKC. Their mission is to provide affordable, decent, safe, and sanitary housing or housing assistance, with quality environments and opportunities to low income people of Oklahoma City. OCHA prioritizes Journey Home OKC clients for housing choice vouchers and public housing placements.

OHFA: The Oklahoma Housing Finance Agency operates in all 77 Oklahoma counties, providing assistance that helps families pay rent or purchase their first home. OHFA also works with nonprofit organizations, developers and municipalities to bring quality housing opportunities to communities across the state. OHFA has priorities for people with disabilities and people experiencing homelessness.

Permanent Supportive Housing: (PSH) is a program that helps eligible people find a permanent home and also connects them to case management and other supportive services in the community. Permanent Supportive Housing is prioritized for the most vulnerable people in the community.

Rapid Re-housing: Rapid re-housing is designed to help individuals and families quickly exit homelessness and return to permanent housing. Rapid re-housing is prioritized by medium acuity levels as determined by the VI-SPDAT. This assistance is generally shorter and less intensive than PSH.

SPDAT: (Service Prioritization Decision Assistance Tool) The full assessment tool that is the preferred method of measurement for baseline acuity as well as other acuity measures overtime. There is also a family version which is called the FSPDAT.

TAY-VI-SPDAT: (*Transition Age Youth Vulnerability Index Service Prioritization Decision Assistance Tool*) The prescreen triage tool our community uses to assess vulnerability in homeless youth age 24 and under. The assessment is scored, and scores are sorted into three ranges; those that are not recommended for housing intervention, those recommended for assessment for time-limited supports with moderate intensity, and those recommended for assessment for long-term housing with high service intensity.

Unaccompanied Youth: These are people under the age of 24 who present for services without an adult. This definition applies to local program planning and reporting to other funders; HUD defines youth as 18-24 and classifies 17 and below as children.

VI-FSPDAT: (Vulnerability Index Family Service Prioritization Decision Assistance Tool) The prescreen triage tool our community uses to assess vulnerability in families with minor children in the household. The assessment is scored, and scores are sorted into three ranges; those that are not recommended for housing intervention, those recommended for rapid rehousing intervention, and those recommended for permanent supported housing/Housing First. This tool differs from the VI-SPDAT in that it assesses vulnerability of the entire family, and has extra sections that focus on children.

VI-SPDAT: (Vulnerability Index Service Prioritization Decision Assistance Tool) The prescreen triage tool our community uses to assess vulnerability in single adults. The assessment is scored, and scores are sorted into three ranges; those that are not recommended for housing intervention, those recommended for rapid rehousing intervention, and those recommended for permanent supported housing/Housing First. VI-SPDAT is used as a general term, and may be used to include the VI-FSPDAT and TAY-VI-SPDAT when talking about the assessment in general.

WestTown Resource Center: The WestTown campus brings together service providers to prevent and address homelessness through effective collaboration. All activity is based on best business practices, with the ultimate goal of helping people achieve and maintain safe, secure and affordable housing. The resource center houses Homeless Alliance staff in addition to community partners; provides clients with convenient access to several community resources in one location.