

Pre-Screen Tool for Housing Calls

Revised 3/24/22

1. Access Point:

Caller Consent (please read statement):

We share information with our partnering agencies in order to coordinate requested services to support you/your household. Do we have permission to share this information with the partnering agency?

2. Consent?

3. Date:

4. Name:

- a. First
- b. Last

5. Date of Birth (request age if client refuses):

a. Age of client:

6. Gender:

7. Race

8. Ethnicity

9. Primary Language Spoken:

a. If 'Other' was selected, Enter Language Spoken:

10. Have you or any member of your household served in the military?

Contact Information

1. Phone 1 (Primary):

2. Phone 2:

3. Phone 3:

4. E-mail

5. Between the hours of 9:00am to 5:00pm, Monday through Friday, when is the best time for the agency to contact you?

6. If the agency is unable to reach you, is this a safe phone number to leave a voicemail or message with someone?

a. If no, please explain:

7. How many people are living in the household, or will be living with you?

- a. Number of adults in household (aged 18 and over)
- b. Number of children in household (under age 18)

8. What is the household's total monthly gross income (past 30 days)

Shelter/Diversion

1. Do you have a place to sleep tonight?

yes/no If no, offer referral info to PADS, Hope House, 360 or Family Shelter Service

**If caller is unable to call shelter providers or go to PADS client service center offer to send caller info to Pads Street Outreach to come see them in the community

2. Does PADS Street outreach need to go out?

a. If Yes, verify most common daytime location.

yes/no

Send prescreen tool to PADS via email

Homeless Prevention/Re-housing

1. Are you looking for assistance with rent or mortgage for your current unit or security deposit to move?

Drop Down: Mortgage, Past Due Rent, Move: Sec. Dep/1st month's rent

2. What city is the home located in?

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3. Have you received an eviction court summons or eviction notice?

If yes, send to DPC with the title EVICTION in the subject line

4. Is your housing crisis directly or indirectly due to the COVID-19 Pandemic?

yes, no

5. Amount and type of assistance requested:

A Rent owed:

Monthly rent amount:

B. Mortgage Owed:

Monthly Mortgage Amount:

C Security Deposit Amount

yes, no

Notes:

13. Have you used People's Resource Center before?

End of assessment. Refer to an agency as designated in the monthly plan.

Please read statement: 'Please be patient, [referral agency] will call you within 5 business days, dependent on call volume.'

1. For office use only. Referred to:

a. If Referral Not Sent or Alternative Referrals:

Coordinated Entry Screening Tool

What is Coordinated Entry?

In its most basic form, coordinated entry is housing-focused and designed to quickly connect families experiencing a housing crisis with housing and housing-related resources as efficiently and effectively as possible. It standardizes the assessment process across local providers, and coordinates the referral for resources (such as prevention services, transitional housing, rapid re-housing, permanent supportive housing, emergency shelter, and case management) in a way that incorporates participant choice, and allows communities to prioritize scarce resources towards the most vulnerable community members.

This tool is a Coordinated Entry screening tool that will be used all participating agencies in the coordinated entry process for housing. The following agencies are “access points”, which means that these agencies are completing the screening tool:

Coordinated Entry Access Points:

- DuPage County Community Services
- Catholic Charities

Additionally, for special populations:

- Family Shelter Service (for domestic violence)
- DuPage Pads Street Outreach (for unsheltered person)

There are other participating agencies that will not be an access point but our agency will send the screening to them to assist the client.

- DuPage Veteran’s Assistance Commission
- Outreach Community Ministries
- People’s Resource Center
- 360 Youth Services (for transitional housing only)
- DuPage PADS Street Outreach (for unsheltered persons)

When a client asks about housing needs, whether it is shelters, rental/mortgage assistance, transitional housing, etc., you will need to complete the tool below to assess their housing needs.

NOTE: You will not need to complete the tool if they are requesting:

- Homeless Prevention funds (rental assistance) for outside the county (ex: moving to Chicago)
- Affordable Housing Resources (not literally homeless, just seeking resources)
- Tenant/Landlord Referrals
- Housing Short Term Case Management Referrals
- Family Self Sufficiency

For Housing Terms Glossary, see the “Housing Pre-Screen Tip Sheet”.

Before you start the tool, please explain to the client that you are completing a housing tool that is a part of a county wide housing initiative that can connect the client to different agencies by sending them a referral to an agency that matches up with their needs.

Coordinated Entry Screening Tool UCD Walkthrough

1. Any assessment tool can be found on the “Assessments” tab located on the household page.

Household - Potter, Harry

Head Of Household	Soc Sec Nbr	Age	Total Income	# Of Mbrs	FSS Status
Potter, Harry	046-81-0UCD	36	\$4,800.00	5	

Household Members Notes CSBG Disaster Assistance Assessments

Application Date: 09/27/2018 EITC: Unknown/Not Reported Child Support Referral: No Selection

Home Address Mailing Address

2. Once you open the "Assessments tab, you will go to "Select Assessment to Open" and select "Pre-Screen Tool for Housing Calls" and then click on the button "Open Assessment".

Household - Potter, Harry

Head Of Household: Potter, Harry Soc Sec Nbr: 046-81-0UCD Age: 36 Total Income: \$4,800.00 # Of Mbrs: 5 FSS Status: HMIS ID:

Household | Members | Notes | CSBG | Disaster Assistance | **Assessments**

Select Assessment To Open: Pre-Screen Tool for Housing Calls Open Selected Assessment

Summary of Assessments

Assessment	Time Taken	Last Time Taken	Of Times Taken

History of Assessments

3. Once the Pre-Screen Housing Tool is opened, a window will open that will show the Pre-Screen tool itself.
 - a. The UCD will automatically populate data from the household page such as the date, name, DOB, gender, etc. of the head of household.
 - b. Next, follow the screening tool walkthrough to answer the questions

UCD - Assessments

Pre-Screen Tool for Housing Calls
Revised 06/19/2018

1. Access Point: DuPage County Community Services ▾

Caller Consent (please read statement):

We share information with our partnering agencies in order to coordinate requested services to support you/your household. Do we have permission to share this information with the partnering agency?

2. Consent? - Select - ▾

3. Date: 12/19/2018

4. Name:

a. First Harry

b. Last Potter

5. Date of Birth (request age if client refuses): 01/01/1982

a. Age of client: 36 ▾

6. Gender: Male ▾

7. Primary Language Spoken: English ▾

a. If 'Other' was selected, Enter Language Spoken: _____

8. Have you or any member of your household served in the military? - Select - ▾

Contact Information

1. Phone 1 (Primary): (555) 555-5555

2. Phone 2: () - -

3. Phone 3: () - -

Save
Close

Pre-Screen Tool for Housing Calls

1. Access Point: ***Please select “DuPage County Community Services”***
2. Caller Consent: ***“We share information with our partnering agencies in order to coordinate requested services to support you/your household. Do we have permission to share this information with the partnering agency?”***
 - a. Answer: Yes/No
 - i. If **“No”**, **STOP** the screening since you do not have permission to continue.
3. Date: ***This will autofill***
4. Name: ***The UCD will carry over the head of household name***
5. Date of Birth/(request Age if client refuses): ***The UCD will carry over the date of birth and age from UCD***
6. Gender: ___ Male ___ Female ___ Transgender Male to Female ___ Transgender Female to Male ___ Does not identify
7. Race: ***The UCD will carry over the date of birth and age from UCD***
8. Ethnicity: ***The UCD will carry over the date of birth and age from UCD***
9. Primary Language Spoken: ***The UCD will carry over the language selected on head of household***
10. Have you or any member of your household served in the military? Y/N
If it is Yes, continue the assessment but at the end of the assessment you will need to select Veteran’s Assistance Commission, so this referral is sent to them. If No, continue the assessment.

Contact Information

1. Phone 1: ***This is carried over from the primary number in the UCD***
2. Phone 2: ***This could be any second or third numbers including friend, relatives, agencies, etc.***
3. Phone 3: “ ”
4. Email: ***Please ask for one since it may be the only point of contact***
5. Between the Hours of 9 am – 5 pm Monday through Friday, when is the best time for the agency to contact you?
6. Best Time to Contact: ***This is a dropdown box and at least one time needs to be selected***
 - Morning, 9-12
 - Afternoon, 12-5
 - Anytime, 9-5p
 - Unavailable

If the agency is unable to reach you, is this a safe phone number to leave a voicemail or message with someone?

Yes/No, if No, explain: ***This field is making sure it is safe to leave a message for the client regarding housing. If it is No, you need to explain why it is not safe to leave a message in the comment box.***

7. How many people are living in the household, or will be living with you?
 - a. # of adults in household (18 & over): ***The UCD will carry over how many adults over 18 there is listed***
 - b. # of children in household (under 18): ***The UCD will carry over how many children under 18 there is listed***

8. What is the household's total monthly gross income? \$ _____ ***This will be for the past 30 days***

Rapid Re-Housing/Diversion

1. Do you have a place to sleep tonight?
 - Yes (go to question #2)
 - No (Offer referral information for PADS, Hope House, 360 Youth, etc.)
2. Does DuPage PADS Street Outreach need to go out?
 - Yes
 - No

If Yes, list the most Common daytime location: ***Please give the location the client is at most frequently so that PADS team member can try and go out to see them.***

- ***If the client consents for a referral being sent to Street Outreach, the assessment will end. Explain to client that a referral will be sent to PADS and then go to the "For Office Use Only" section at the end of the form and select the "DuPage PADS Street Outreach" box***
- ***Then hit the "Email Button" and the referral will be sent to HMIS who will send it to the PADS contact.***

Homeless Prevention

1. Are you currently looking for assistance with rent or mortgage for your current unit or security deposit to move?
 - Past Due Rent
 - Past Due Mortgage
 - Move: Security Deposit

2. What city is the home located in?

Please select a city from the drop-down list, it will contain all cities/villages in DuPage County. If they are seeking assistance with out of county home then the assessment will end.

3. Have you received an eviction court summons or eviction notice?
 - a. If No, continue assessment
 - b. If Yes, send to DuPage County Housing unit with EVICTION in subject line

4. Were the circumstances directly or indirectly due to COVID-19 Pandemic?
 - a. Yes
 - b. No

5. Amount of Assistance Requested
- a. Rent Amt Owed \$ ***Please put the dollar amount that they are seeking help with***
 - b. Monthly Rent Amount \$ ***Please put in their normal monthly amount***
 - c. Security Deposit Amt \$ ***Please put the amount needed only if they are requesting security deposit***
 - d. Mortgage Amt Owed \$ ***Please the amount needed only if they are requesting mortgage assistance***
 - e. Monthly Mortgage Amount: ***Please put in their normal monthly amount***

****All fields do not need to be filled since it is for different needs***

6. Client Story:

This is a case note box that brief details about the client situation should be listed. For example:

“Client seeking rental assistance for month of May due to being on unpaid medical leave from work in April. Client returned to work on May 15th but is behind on May’s rent. Has 5 Day notice and owes \$1100 for May.”

7. Have you used People’s Resource Center before?

Drop-down box: Yes or No

If they state Yes, when you get to the end of the assessment, please select “People’s Resource Center”. This referral will be sent to that agency. If No, please send the referral to appropriate agency based on the monthly plan.

End of assessment. Refer to an agency as designated in the monthly plan.

At this point, you will need to look at the current monthly plan that is sent out by the Intake and Referral Management. Review the criteria and chose which agency to send it to. Once you have chosen the agency, please read the statement below to give the client a time frame on when that agency will call them back.

Please read statement: Please be patient, “(referral agency) will call you within 5 business day, depending on call volume.”

This is to provide a timeline for a callback from any of the agencies we are sending the referral to.

For office use only. Referred to:

Please select from the dropdown list one of the following options:

- Catholic Charities (CC)**
 - Referrals are sent to them when the client is in their geographic boundaries and when funding is available
- DuPage County Community Services (DCCS)**
 - Referrals are sent to our Housing unit when the client is in their geographic boundaries and when funding is available
- Veteran’s Assistance Commission (VAC)**
 - Any client that identifies as a Veteran regardless if they are seeking Homeless Prevention Funds or Rapid Re-Rehousing (shelter)
- Outreach Community Ministries (OCM)**

- Referrals are sent to them for Carol Stream and Warrenville, referrals for Glen Ellyn and Wheaton will be directed to DCCS
- People’s Resource Center (PRC)**
 - Referrals are sent to them only if they identify they have been to PRC before
- 360 Youth Services (transitional housing only)**
 - Referrals are sent to them only for transitional housing for single non-parenting females 18-21 and single non-parenting males 18-24 and LGBTQ youth 18-21
- DuPage PADS Street Outreach Program:**
 - Referral are sent to them only if the client wants street outreach to come and they are literally homeless
- Referral Not Sent/Alternative Referrals**
 - Please write in the text box why the referral wasn’t sent (ex: no 5-day notice, no unit identified) and if any privately funded agencies like Loaves & Fishes, Love Christian Clearinghouse or any other church organization were provided.

Referral Process:

1. Once you select the appropriate agency and tell the client about the callback time, you will hit “Save” at the bottom of the window:

a. If yes, please list agency or agencies:

13. Have you used People's Resource Center before? No


End of assessment. Refer to an agency as designated in the monthly plan.

Please read statement: 'Please be patient, [referral agency] will call you within 5 business days, dependent on call volume.'

1. For office use only. Referred to: DuPage County Community Services (DCCSO)

a. If Referral Not Sent or Alternative Referrals:

Save
Close



2. It will open an Outlook email and prefill the “To” with the email address of the agency you selected on the tool. For example, if you selected DuPage County Services as being the one you are sending the tool too, it will list the housing email at DuPage county.
 - It will also attach a copy of the Pre-Screen tool and prefill out the subject line

3. You must hit "Send" on the email to send it to the agency. If you close it, it will save as "draft" in your outlook email and it will never send it.
 - It is also **very important** that you have outlook open otherwise the email will not open and an error box with pop up.
 - Once you send, the referral has been sent to the agency indicated and you will be back at the original "Assessment" window.

4. Referral Exceptions:
 - If you select "Referral Not Sent/Alternate Referral" on the tool as the agency it will not open an email window, but it will open the print window. You do not need to print this assessment and you can close the print window.

To see what has been done in the "Summary of Assessments" or the "History of Assessments", hit the "Refresh Household" button at the bottom and It will update both sections.

Household - Potter, Harry

Head Of Household: Potter, Harry Soc Sec Nbr: 046-81-0UCD Age: 36 Total Income: \$4,800.00 # Of Mbrs: 5 FSS Status: HMIS ID:

Household | Members | Notes | CSBG | Disaster Assistance | **Assessments**

Select Assessment To Open: Open Selected Assessment

Summary of Assessments

Assessment	First Time Taken	Last Time Taken	# Of Times Taken
▶ Pre-Screen Tool for Housing Calls	12/19/2018 07:48 PM	12/19/2018 07:48 PM	1

History of Assessments

Pre-View Assessment Re-Send Assessment Email Assessment To:

Assessment	Taken	Entered By	Sent	Sent By
▶ Pre-Screen Tool for Housing Calls	12/19/2018 07:48 PM	James, Bridget (hsbej)	12/19/2018 07:48 PM	James, Bridget (hsbej)

Refresh Household Close Household

- In the “Summary of Assessment” it will show the type of assessment and how many times it has been completed as well as the date and time stamp of the first time and last time it was taken.

Summary of Assessments

Assessment	First Time Taken	Last Time Taken	# Of Times Taken
▶ Pre-Screen Tool for Housing Calls	12/19/2018 07:48 PM	12/19/2018 07:48 PM	1

- In the “History of Assessments”, it will show everyone’s assessment and gives details on when it was taken, who it was entered, when it was sent and who it was sent by.

- It also allows you to re-send the assessment highlighted or email the assessment to a different email address than the one listed in the assessment

History of Assessments

Assessment	Taken	Entered By	Sent	Sent By
▶ Pre-Screen Tool for Housing Calls	12/19/2018 07:48 PM	James, Bridget (hsbej)	12/19/2018 07:48 PM	James, Bridget (hsbej)

Other UCD and CMIS Entry:

When you are completing the tool, the client must still be entered into our databases, UCD and CMIS:

- For the UCD, please go through the normal intake screening (capturing household members, income and demographics, assessing for CSBG) and when you add UCD note, you must write that the tool was completed and what agency the client was referred to.
 - This is very important for tracking and if the client calls back with any questions.

- For senior clients (60+), they must be entered in to CMIS with all the normal intake screening information.
 - Please enter 07 or 075 I&A intake
 - In the comments/Case Notes, please state that the referral was completed and what agency the referral is being sent to.
 - Please add the Client Service Activity

For statistics in the UCD:

- Please select “CES Housing Tool Completed” if you completed the housing tool for homeless prevention funds. This will replace the “Rental/Mortgage Assistance” category
- Please select “Rapid Rehousing Referral” for homeless clients that you provided Street Outreach or other shelter referrals. This will replace “Homeless I&R (Not referred to CM)” category.
- A new statistical category was added, “CES Housing Tool Follow-up Call” to track clients calling back after initial referral to check on their status, questions, etc.

Other Tips:

- Per the monthly plan that is sent out by the Housing Manager on the first of every month, there may be a cutoff point for referrals sent to the different coordinated entry agencies, where the tool will not be completed after that date. The date will be specified in the monthly plan.
- If a client calls and states that they have not gotten a call yet from an agency, they missed a call, have questions, etc., please tell them the following:
 - If it has been less than 5 business days, please explain that the agency’s callback timeline
 - If it has been between 5-30 business days, please look up where the referral was sent to and provide them the agency phone number to follow-up.
 - If it is an internal referral (to our own housing unit, please look to see if there are any UCD notes or check in the referral has been signed out the bin in Housing.
 - If it has been more than 30 days since the referral or it is a start of new month, please complete the tool again and re-refer the client to the appropriate agency
 - If the client’s situation has changed greatly, ex: homeless client who was previously screened and given shelter referrals, has now found an apartment and needs security deposit, please complete the tool again and refer the client to appropriate agency.