Last Update: March 14, 2022 Approval Date: April 20, 2022	
Intake Policy	
Policy Statement	This policy and protocol details guidelines and best practices for intake into the Coordinated Access System for individuals who are homeless or at immediate risk of homelessness.
Purpose	To ensure those at-risk of or currently experiencing homelessness can access support services and/or resources quickly, equitably, and effectively. While undertaking intake practices, staff utilize key instruments, including HIFIS and a common assessment triage tool (currently the VI-SPDAT), to obtain important information about client circumstances, needs and preferences that will later be used to match them to appropriate supports.
Indigenous Clients	Indigenous identifying clients choosing to access mainstream services will be prioritized first. Those identifying as Indigenous are not required to use mainstream triage and assessment tools in order to receive services. An alternative Indigenous Common Assessment Tool will be offered as an option to Indigenous clients. Consent must be provided to receive services and store any and all personal information. Indigenous identifying clients are not required, but may choose, to consent to their information being stored in HIFIS and on the By-Name List (BNL). Progressive engagement to obtain consent should be conducted according to agency practice in a way that is culturally considerate and respects individual autonomy.
Intake, Consent, & Common Assessment (VI-SPDAT)	**Intake Form** All City-funded programs in Hamilton's Homeless Serving Sector are required to use the standardized Intake Form for clients as embedded in HIFIS. The Intake Form collects basic demographic and housing information needed to serve and refer clients in accordance with best practices and funding obligations. This tool is intended to initiate case management with the client and to highlight areas where a client may require supports related to securing permanent housing. Individual organizations may collect

additional information upon intake or throughout service provision.

Consent

Individuals must be asked for their explicit consent to have their personal information stored in the Homelessness Management Information System (HIFIS 4.0 and the BNL) All new clients are required to review and sign *Hamilton's Homeless-Serving System Consent for the Collection and Sharing of Personal Information.* Clients who do not consent to collection and sharing of their personal information may still access emergency sheltering services and staff will attempt to progressively engage to obtain consent. Staff will explain how, why, and with whom personal information will be shared in order to support the client through Coordinated Access.

At the time consent is received, staff will record in HIFIS that the client has provided explicit consent. The individual or family will be connected to case management support and placed on the BNL for prioritization and right matching to available community resources that best meet their needs and preferences.

People must consent to the services provided by the agency where they present; however, it must be communicated that they are clients of the whole homeless-serving system in Hamilton. This means their information may be shared within the system to connect them with the most suitable supports.

In cases where clients do not provide consent upon entry and the agency agrees to provide service, staff will continue to engage with individuals on the topic of consent. Clients who do not provide consent cannot be added to HIFIS 4.0 or the BNL.

Withdrawn Consent

A client may withdraw consent at any time. In the event that a client withdraws their consent for their information to be collected and shared, agency staff will:

- Obtain the client's signature on a new consent form with "For Withdrawing Consent" selected as the consent option.
- City staff will expire the client's previous consent form on HIFIS with an expiration date of the withdrawal date. This will lock the client's HIFIS file to prevent access.
- Report the withdrawal of consent to the City through the hifis@hamilton.ca e-mail account.

Common Assessment (SPDAT Series of Tools: VI-SPDAT & SPDAT)

The Vulnerability Index - Service Prioritization Decision Assistance Tool (VI-SPDAT) is the current standardized triage tool for Hamilton. All Coordinated Entry Points, including staff at emergency shelters, drop-ins, and outreach teams must complete VI-SPDAT assessments. Staff should complete the VI-SPDAT with clients at or within 14 days of intake.

Only clients who are new to the system should have a VI-SPDAT completed. Existing clients do not require a re-completion of the VI-SPDAT unless their circumstances have significantly changed.

A client should only have to complete the VI-SPDAT triage tool once. If there are major changes to the person's circumstances, including being housed and becoming homeless again, or if program staff are concerned that the VI-SPDAT failed to accurately capture client need/risk, the full SPDAT is recommended. Research shows the accuracy of the triage tool is lessened each time it is retaken. The client's VI-SPDAT and/or SPDAT scores can be accessed in HIFIS.

Adding a VI-SPDAT

1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**

Once on the SPDAT Intake List, go to the VI-SPDAT tab. Once in the VI-SPDAT tab:

1. Choose which version of VI-SPDAT you would like to do (i.e. VI-SPDAT v3, F-VI-SPDAT v3, TAY-VI-SPDAT v2).
2. Click on the button corresponding to the type of VI-SPDAT you would like to do (for example, if you wanted to do a TAY-VI-SPDAT v2, click on the **+YOUTH V2** button).
3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment.
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Pre-Screen Period for this VI-SPDAT assessment. What this means is how many times has this

	client completed a VI-SPDAT? Is this the first, second, etc. time?
	7. If applicable, indicate whether the client was pregnant at the time of the VI-SPDAT assessment (only asked for some VI-SPDAT versions).
	8. Indicate whether the client provided consent to complete this assessment.
	9. Select the program where this assessment was completed.
	10. Add a description about this assessment.
	11. For each question on the VI-SPDAT, select the Client's answer. If the Client did not answer, toggle Refused to "Yes".
	12. Click the **SAVE** button.
Applicability	<u>Agency</u> This policy applies to all funded agencies in Hamilton's homeless-serving system.
Definitions	**Entry Points:** the engagement points for persons experiencing a housing crisis (i.e. drop-ins, emergency shelters, outreach, etc.) **Acuity Scale**: best practice approach to right matching of services. Case managers can use the scale to assess nature and severity of issues facing their clients. Alternatively, the scale can be used by management for balancing the time commitment and caseload of an organization overall. **By-Name List:** Includes the names of individuals and families who are known to be actively experiencing homelessness and have provided consent to appear on the list. **By-Name Priority List:** a subset of the By-Name List that identifies those with the highest priority for matching to an available housing resource based on community developed criteria. **Common Assessment Tool:** refers to a standardized tool in the community that has been endorsed by the Community Entity and which agencies have been trained to use across the system. **Community Entity (CE):** lead decision-making body that coordinates efforts to achieve federal, provincial, and local housing outcomes. The City, as Designated Community

	Entity, prioritizes collaborative work with the Indigenous CE in all areas of Coordinated Access planning, strategy, and service delivery to develop connections to housing and supports that are culturally appropriate and rooted in the spirit and actions of reconciliation that recognize the values of autonomy and self-determination. • **Community Entity (Indigenous Funding Stream):** The Coalition of Hamilton Indigenous Leadership (CHIL) is the lead decision-making body for the Indigenous funding stream that coordinates efforts to achieve Indigenous self-determined housing outcomes locally. • **Consent:** explicit permission for something to happen or an agreement to do something. • **Coordinated Intake:** a standardized approach to assessing a person's current situation, the acuity of their needs, and the services they currently receive and may require in the future. It considers the background factors that contribute to risk and resilience, changes in acuity, and the role of friends, family, caregivers, community, and environmental factors. • **HIFIS:** Homeless Individuals and Families Information System (HIFIS) is a web-enabled Homelessness Management Information System (HMIS) that allows multiple service providers to implement coordinated access using real-time information about people experiencing homelessness and the resources they need to find and keep a home. • **Homeless Serving Sector:** comprises a range of local or regional service delivery components serving those who are homeless or at imminent risk of homelessness.
Responsibilities	Community Entity (CE) The CE is required to document and make available a policy for standardized intake and consent as well as to ensure the use of a common assessment tool (VI-SPDAT) across the system. It is the responsibility of the CE to make resources available to support agencies with the appropriate understanding of how to apply common intake, consent, and assessment in alignment with implementation of HIFIS and Coordinated Access. Agency It is the agency's responsibility to use the common intake, consent and assessment tools outlined above with every client and report those metrics within 30 days through HIFIS (and/or monthly data tools, if required). Furthermore, the agency must

	follow client privacy protocols for their respective organizations to ensure personal information is secured.
Accountability	<u>Community Entity (City of Hamilton)</u> The CE is accountable for the creation of policies, standards, and processes for intake, consent and assessment as well as generating a BNPL bi-weekly to share with agency partners. <u>Agency</u> The agency is accountable to ensure every client that seeks homelessness services is provided with the initial intake supports required to connect them with resources. Furthermore, agencies must record and input that information into the HIFIS database promptly to ensure the system has the most accurate and up-to-date information. Each agency is responsible for maintaining the security of hard copy consent forms.
Entry Points & Process	Access points into the Coordinated Access System include: - Outreach - Drop-ins - Emergency Shelters (men, women, youth, Indigenous) - Hamilton Housing Help Centre - City of Hamilton Housing Services Entry into the Coordinated Access system begins with an initial conversation to understand client history and needs with respect to housing. The common assessment tool (VI-SPDAT) is used to help guide this conversation to obtain key information that will support program referrals and resource allocation. Once assessment (VI-SPDAT) is completed, it is entered into HIFIS. The City of Hamilton, Housing Services Division, reviews the information and manually adds clients to the By-Name List. This list is further prioritized (please see Prioritization Policy for details) and used to refer clients to resources best suited to their needs. Once a client is referred to a housing program a full SPDAT is required. Anytime a client returns to a homeless service provider the program will confirm their status in HIFIS and re-activate the client with their consent.

Related Documents	• *Hamilton's Homeless-Serving System Consent for the Collection and Sharing of Personal Information* • Hamilton's Coordinated Access Guidelines • Hamilton's Systems Planning Framework • Coordinated Access Policies • Revisioning Coordinated Access: *Fostering Indigenous Best Practices Towards a Wholistic Systems Approach to Homelessness* • Urban Indigenous Strategy • Hamilton's Housing and Homelessness Action Plan