



## BoS Coordinated Assessment Tool

The NC BoS Coordinated Assessment Tool is made up of 3 parts that are used at different phases of coordinated assessment. Assessments may only be modified as specified below beside MODIFICATIONS. People administering assessments must watch the individual training for that part of the assessment tool. If a person is administering all three parts of the tool, s/he must watch all three trainings.

### 1. Prevention and Diversion Screen

PURPOSE	Reduce entries into homeless system and direct households entering system to appropriate emergency services
WHEN TO ADMINISTER	Immediately, as applicants present themselves to enter the homeless service system
HOW TO ADMINISTER	Agencies complete screening in person and/or by phone as people initially access the homeless service system
TRAINING	<a href="https://prezi.com/3swi9bhxszd/prevention-and-diversion-screen-version-2/">https://prezi.com/3swi9bhxszd/prevention-and-diversion-screen-version-2/</a>
MODIFICATIONS	None

### 2. VI-SPDAT

PURPOSE	Assign appropriate referral for client and prioritize which client will receive housing and services next
WHEN TO ADMINISTER	Recommendation: 14 days after entering system
HOW TO ADMINISTER	Designated locations and staff administer VI-SPDAT
TRAINING	<a href="https://prezi.com/ebmxox_3qwqd/vi-spdats-version-2/#">https://prezi.com/ebmxox_3qwqd/vi-spdats-version-2/#</a>
MODIFICATIONS	How scoring determines program referrals

### 3. Case Management Tool

PURPOSE	Standardized tool for case management to track outcomes
WHEN TO ADMINISTER	At program entry, at housing entry, every six months thereafter until program discharge, twelve months after assistance ends
HOW TO ADMINISTER	Housing programs administer this tool to all participants
TRAINING	<a href="https://prezi.com/adwfk2xzig_/case-management-tool-version-2/">https://prezi.com/adwfk2xzig_/case-management-tool-version-2/</a>
MODIFICATIONS	None

## Case Management Tool (Page 1 of 2)

Name \_\_\_\_\_ DOB \_\_/\_\_/\_\_\_\_ Assessment Date \_\_/\_\_/\_\_\_\_ Initial Interim Exit  
 Program Name \_\_\_\_\_ HMIS ID \_\_\_\_\_

Domain	1	2	3	4	5	Score	Participant goal?
<b>Housing</b>	Homeless: living in a place not meant for human habitation, shelter, transitional housing; exiting institution where temporarily resided up to 90 days and homeless immediately prior to entry	Threatened with eviction, in transitional or substandard housing, current housing cost unaffordable (+30% of income)	In stable housing that is safe but only marginally adequate	Household is in safe, adequate, subsidized housing	Household is in safe, adequate, unsubsidized housing		
<b>Employment</b>	No job	Temporary, part-time or seasonal; inadequate pay, no benefits	Employed full time; inadequate pay; few or no benefits	Employed full time with adequate pay and benefits	Maintains permanent employment with adequate income and benefits		
<b>Income</b>	No income	Inadequate income and/or spontaneous or inappropriate spending	Can meet basic needs with subsidy; appropriate spending	Can meet basic needs and manage debt without assistance	Income is sufficient, well managed; has discretionary income and is able to save		
<b>Food</b>	No food or means to prepare it; relies on free or low-cost food (soup kitchen, food pantry, etc.)	Household is on food stamps	Can meet basic food needs, but requires occasional assistance	Can meet basic food needs without assistance	Can choose to purchase any food household desires		
<b>Child Care</b>	Needs childcare but none is available/accessible or child ineligible	Unreliable, unaffordable or inadequate supervision for available childcare	Affordable subsidized childcare is available, but limited	Reliable, affordable childcare is available, no need for subsidies	Able to select quality childcare of choice		
<b>Children's Education</b>	One or more school-aged children not enrolled in school	One or more school-aged children enrolled in school, but not attending classes	Enrolled in school, but one or more children only occasionally attending classes	Enrolled in school and attending classes most of the time	All school-aged children enrolled and attending on a regular basis		
<b>Adult Education</b>	Literacy problems or lack of high school diploma/GED are serious barriers to employment	Enrolled in literacy or GED program; has sufficient command of English; language not a barrier to employment	Has high school diploma/GED	Needs additional education/training to improve employment or resolve literacy problems	Completed education/training to become employable; no literacy problems		
<b>Health Care Coverage</b>	No medical coverage with immediate need	No medical coverage; great difficulty accessing care when needed	Some members (e.g. children) have medical coverage	All members can get medical care when needed, but may strain budget	All members are covered by affordable, adequate health insurance		
<b>Life Skills</b>	Unable to meet basic needs such as hygiene, food, activities of daily living	Can meet a few but not all needs of daily living without assistance	Can meet most but not all daily living needs without assistance	Able to meet all basic needs of daily living without assistance	Able to provide beyond basic needs of daily living for self and family		

## Case Management Tool (Page 2 of 2)

Domain	1	2	3	4	5	Score	Participant Goal?
<b>Family /Social Relations</b>	Lack of necessary support from family/friends; abuse or neglect is present	Family/friends lack ability or resources to help, do not relate well; potential for abuse or neglect	Some support from family/friends; changing negative behaviors; learning communication and support	Strong support from family or friends; household members support each other's efforts	Healthy/expanding support network; stable household with open communication		
<b>Transportation</b>	No access to transportation, public or private; may have car that is inoperable	Transportation is available but unreliable or unaffordable; may have car but no insurance, license, etc.	Transportation is available and reliable, but limited and/or inconvenient; drivers are licensed and minimally insured	Transportation is accessible; meet basic travel needs	Transportation is readily available and affordable		
<b>Parenting Skills</b>	Children not in parental custody	Significant current involvement of CPS/family court system	Receives ongoing services from DSS or other community partners; recent past involvement in parental rights issues	Family intact with no services; children have delinquency or truancy issues	Family intact with no need of services and no delinquency/truancy issues		
<b>Legal</b>	Current outstanding tickets or warrants	Current charges/trial pending, noncompliance with probation/parole	Fully compliant with probation/parole terms	Has successfully completed probation/parole within 12 months, no new charges filed	No active criminal justice involvement in +12 months and/or no felony history		
<b>Physical Health</b>	Experiencing severe difficulty in day-to-day life due to physical health problems	Recurrent physical health symptoms; persistent problems with functioning due to physical health symptoms	Minimal symptoms not under treatment; moderate difficulty in functioning due to physical health problems	Minimal symptoms under current treatment; slight impairment in functioning	No current physical health issues and/or in effective treatment for chronic conditions; slight or no impact on functioning		
<b>Mental Health</b>	Danger to self or others; recurring suicidal ideation; experiencing severe difficulty in day-to-day life due to psychological problems	Recurrent mental health symptoms that may affect behavior, but not a danger to self/others; persistent problems with functioning due to mental health symptoms	Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems	Minimal symptoms that are expectable responses to life stressors; only slight impairment in functioning	Symptoms are absent or rare; good or superior functioning in wide range of activities		
<b>Substance Abuse</b>	Meets criteria for severe abuse/dependence; resulting problems so severe that institutional living or hospitalization may be necessary	Meets criteria for dependence; preoccupation with use and/or obtaining drugs/alcohol; withdrawal or withdrawal avoidance behaviors evident; use results in avoidance or neglect of essential life activities	Use within last 6 months; evidence of persistent or recurrent social, occupational, emotional or physical problems related to use (such as disruptive behavior or housing problems); problems have persisted for at least one month	Client has used during last 6 months, but no evidence of persistent or recurrent social, occupational, emotional, or physical problems related to use; no evidence of recurrent dangerous use	No drug use/alcohol abuse in last 6 months		
<b>Safety</b>	Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement	Safety is threatened/temporary protection is available; level of lethality is high	Current level of safety is minimally adequate; ongoing safety planning is essential	Environment is safe; however, future is uncertain; safety planning is important	Environment is apparently safe and stable		
<b>Disabilities</b>	In crisis – acute or chronic symptoms affecting housing, employment, social interactions, etc.	Vulnerable – sometimes or periodically has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Safe – rarely has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Asymptomatic, condition controlled by services or medication	No identified disability		