B-PAT Instructional Guide

**Ohio Balance of State Continuum of Care**

# Background

The Ohio Balance of State CoC Prioritization Assessment Tool (B-PAT) is a new common assessment tool in testing. The purpose of the tool is to help providers better understand the severity of need of clients and determine which clients to prioritize for available permanent housing (PH) resources.

# What is the B-PAT?

The B-PAT is currently being tested as the new common assessment tool for Ohio BoSCoC, potentially replacing the VI-SPDAT.

The B-PAT has been designed to be administered in the same way that the VI-SPDAT would be administered. You can find more details below. Providers may also refer to the Ohio BoSCoC CE Operational Manual for additional details, if needed - <https://cohhio.org/boscoc/coordinated-entry/>. Please note, the CE Operational Manual still references the VI-SPDAT. However, providers can simply apply any applicable CE Operational requirements or guidance to the B-PAT.

# B-PAT Tools

There are four tools in the B-PAT series:

* B-PAT for households without children (adults ages 25+)
* B-PAT for households with minor children (adults ages 25+)
* B-PAT for non-parenting youth (ages 18-24)
* B-PAT for parenting youth with minor children (youth ages 18-24)

**B-PAT for Households without Children (B-PAT, HH w/o Children)**

Use this B-PAT when the household is comprised of at least one adult 25 years of age and older. If the household is comprised of multiple adults, you may complete a B-PAT on the Head of Household. If the adults in the household are planning to live separately as part of their housing plan, you will likely want to complete a B-PAT with each adult.

## B-PAT for Households with Children (B-PAT, HH w/ children)

Use this B-PAT when the household includes at least one adult, age 25+, with minor children.

## B-PAT for Non-Parenting Youth (B-PAT, Youth)

Use this B-PAT when the household is comprised of individuals 18 - 24 years of age or unaccompanied youth under 18. If the household is comprised of multiple youth (not parenting youth with their minor children), you may complete a B-PAT on the Head of Household. If the youth in the household are planning to live separately as part of their housing plan, you will likely want to complete a B-PAT with each youth.

## B-PAT for Parenting Youth (B-PAT, Parenting Youth)

## Use this B-PAT when the household is comprised of individuals 18 - 24 years of age with minor children.

## When the B-PAT is Administered

The Ohio BoSCoC Coordinated Entry Operational Manual outlines the process for VI-SPDAT/B-PAT administration as follows:

Emergency shelter/crisis response providers complete the B-PAT no sooner than 5 days and no later than 8 days after shelter entry, for those households who are experiencing their first episode of homelessness.

Emergency shelter/crisis response providers complete the B-PAT immediately, or take other action, in the following cases:

* Individual/household is living in an unsheltered location and must remain unsheltered (i.e. individual declines shelter or limited bed/hotel voucher availability)
* Shelter resident seems to need assistance to exit shelter ASAP for their well-being (e.g. exhibiting severe mental health needs/issues)
* Individual/household has previous episodes of literal homelessness
* Information about past episodes of literal homelessness must be collected during the intake process (and entered into HMIS for HMIS participating shelters). This data should be used to identify households needing immediate assessment.

Homeless Veterans are immediately referred to the local SSVF provider. No assessment needs to be done by the shelter provider unless the Veteran has declined SSVF assistance or is determined to be ineligible for VA assistance. In this case, the emergency shelter/crisis response provider will follow the CE procedures to determine prioritization for available PH resources.

Individuals/households should be re-assessed with the B-PAT under the following circumstances:

* The nature of their homelessness has changed significantly, i.e., someone has become seriously ill, the head of household change, or any situation that renders the individual or household eligible for greater or lesser intensity of services.
* It has been more than one year since their last assessment.

Coordinated Entry Access Point (CE AP) providers may complete the B-PAT immediately with households seeking in the following cases:

* The household reports they are currently experiencing unsheltered homelessness, and are unable or unwilling to enter into an emergency shelter

In these instances, the CE AP may complete the B-PAT over the phone or in person, depending on how the household presented. If the household seeking assistance is currently housed, even if they will lose that housing soon, no B-PAT needs to be completed.

Results of the B-PAT should be recorded in HMIS, per the Ohio BoSCoC HMIS Policies and Procedures and Data Quality Standards.

## B-PAT Basic Information

In general, the B-PAT is administered by provider staff asking the client household the questions in the tool and documenting the client’s response. Provider staff are encouraged to record client responses even if staff believe the response to not be completely accurate.

If needed while administering the B-PAT with households with children, staff may consider skipping and coming back to questions if the parent does not want children present for some of the assessment questions.

## Consent

An individual must provide verbal consent prior to the B-PAT being completed.

## The Types of Questions in the B-PAT

Response options to B-PAT questions are multiple choice, with many questions only asking for a yes or no response. There is no elaboration or narrative required.

Every question must be asked, and a response must be recorded for every question, even if that response is “Refused.”

If a person refuses to answer one of the questions in a Linked Question set, mark “Refused” and keep asking the other questions in the set. Depending on which questions are “Refused”, it may still be possible to assign a score to the Linked Question set. A Linked Question set is unusable if all of the questions that are linked together are “Refused”.

## Collecting Responses from All Adult Household Members

Staff can complete the assessment with all household members present or with only some members present. Questions for adults apply to all adult members in the household, not just the head of household. If needed, corrections to assessment tool responses may be made after initial completion.

For questions asking about the number of times of a particular experience, scoring responses should be based on the experience of the household as a whole. For example, when selecting the response and score to the question asking about numbers of evictions in the last 5 years, the response should be based on the experience of all household members in total – if one household member experienced 2 evictions in the last 5 years and the other household member also experienced 2 evictions (separate from the other household member), then staff should select B as the response (2+ evictions), which returns a score of 1 point.

If household members provide differing responses a question, record the response that is associated with the higher score and reflects greater need or vulnerability. For example, one question asks “Do you believe you have been discriminated against in your attempt to access housing based on your identity or background?”. A response of ‘yes’ returns a score of 1 and a response of ‘no’ returns a score of 0. If one adult household member responds ‘yes’ to this question but the other person responds ‘no’, the assessor should document the ‘yes’ response.

**Responses from HMIS Data**

The B-PAT also includes a few questions for which the response can be generated by reviewing HMIS from the client’s most recent program enrollment, whether that is a CE Access Point (CE AP enrollment) or an enrollment in a shelter or street outreach project. These questions are clearly noted with ‘***FROM HMIS CLIENT PROFILE’*** or ‘***FROM HMIS PROGRAM ENROLLMENT’***. To document the appropriate responses to questions that rely on this HMIS data, staff should the appropriate information from the client profile or program enrollment in HMIS and document the appropriate response and resulting score. This can be done after staff have completed the tool with the client household.

## Clarifying Questions for Informational Purposes

If a participant or assessor does not understand a question, clarification can be provided. It’s okay to rephase questions or provide examples to clarify intent.

# Preparing to Administer the B-PAT

The B-PAT begins with the collection of the name of the head of household and documentation of their HMIS client ID.

## Introductory Script

Provider staff should begin administration of the B-PAT with a brief opening statement about its purpose and how it will be administered. Staff should ensure this opening statement highlights the following information:

* The purpose of the B-PAT is to help staff understand the household’s level of need
* For households with minor children – some of the questions are personal in nature. It is their choice whether or not they want their children present. If they choose to have children present, they can choose to skip questions if they don’t want to answer in front of their children, and we can come back to it later.
* We estimate the B-PAT takes about 15 minutes to complete, but could take longer
* How to answer questions – yes, no, or multiple-choice responses
* Clients can ask for clarification if they don’t understand the question
* Any question can be skipped or refused
* Completed paper B-PATs will be stored in locked, secure files, and data entered into HMIS is kept confidential and private
* Clients are encouraged to be as honest as possible
* The B-PAT will only be administered with client consent

## Sample Script

My name is [interviewer name] and I work for a group called [organization name]. I have a short survey that I would like to complete with you. The answers will help us determine how we can go about supporting and housing you. Most questions only require a Yes or No. Some questions require a one-word answer. You can skip or refuse any question. The information collected will be put into our confidential database, HMIS, and any written surveys will be destroyed or stored in a secure location.

If you do not understand a question, let me know and I would be happy to clarify. If it seems to me that you don’t understand a question, I will also do my best to explain it to you without you needing to ask for clarification. Please answer as honestly as you feel comfortable.

# Calculating the B-PAT Score

Once you have completed the B-PAT, calculate the section sub-total scores and then calculate the total B-PAT score. Enter this data into HMIS.