

ServicePoint User Guide

Contents

New Clients

I.	Adding a New Client to ServicePoint.....	2
II.	Adding a Client to a Project.....	6
III.	Adding a Release of Information in ServicePoint.....	13
IV.	Changing Household Composition.....	15

Current Clients

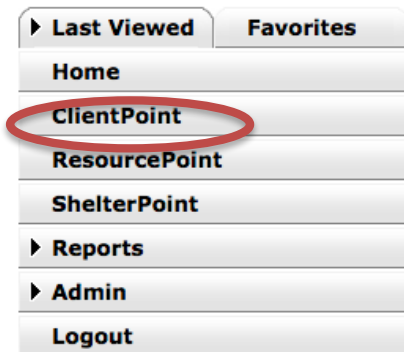
V.	Adding a HUD/PATH/SSVF Update in ServicePoint.....	23
VI.	Adding a Follow-Up VI-SPDAT in ServicePoint.....	29
VII.	Tracking Services Provided in ServicePoint	31

Exiting Clients

VIII.	Exiting a Client from a Project in ServicePoint.....	33
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I. Adding a New Client to ServicePoint

1. Click ClientPoint in the menu on the left side



2. Check to make sure the client is not already in the system
 - a. Enter all or part of the client’s name or social security number

First	Middle	Last	Suffix
<input type="text" value="Jane"/>	<input type="text" value="Anne"/>	<input type="text" value="Client"/>	<input type="text"/>

- Note: ServicePoint will search for similar names; for example, “John” will return John, Jon, Jonny, Juan, etc.
 - If the Exact Match box is checked, this will not work. As client names may have been given or entered inconsistently, please do not check this box
- b. Click Search
 - c. Check and see if the client is listed in the Client Results that will appear below the Client Search box
3. If the client is already in ServicePoint, click on their name to open their profile
 - a. Proceed to step 4(i)
 4. If the client is not already in ServicePoint, add them
 - Note: adding an anonymous client is against the HMIS Policies & Procedures of the Vallejo/Solano County Continuum of Care. You may use a partial or approximate name if necessary.

	First	Middle	Last	Suffix
Name	<input type="text" value="Jane"/>	<input type="text" value="Anne"/>	<input type="text" value="Client"/>	<input type="text"/>
Name Data Quality	<input type="text" value="Full Name Reported"/>			
Alias	<input type="text"/>			
Social Security Number	<input type="text" value="987"/>	<input type="text" value="65"/>	<input type="text" value="4321"/>	
Social Security Number Data Quality	<input type="text" value="Full SSN Reported (HUD)"/>			
U.S. Military Veteran?	<input type="text" value="No (HUD)"/>			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input checked="" type="radio"/>			

<input type="button" value="Search"/>	<input type="button" value="Clear"/>	<input type="button" value="Add New Client With This Information"/>	<input type="button" value="Add Anonymous Client"/>
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- a. Fill out as much of the client's name as you have
 - Please use standard capitalization when entering client names
 - b. Use the Name Data Quality dropdown to report whether you have entered a full, partial, or code name, or if the client was unwilling or unable to give their name
 - **NOTE: Data quality fields should not be left blank.** Data quality is an important consideration for receiving HUD funding.
 - c. If the client is known by any other name, including a maiden name, enter it in the Alias field
 - d. If the client has provided all or part of their social security number, enter it in the Social Security Number field
 - e. Use the Social Security Number Data Quality dropdown to report whether you have entered a full, partial, or approximate social security number, or if the client was unwilling or unable to provide their social security number
 - f. Use the U.S. Military Veteran? dropdown to report whether the client ever served active duty in the U.S. military
 - g. Click Add New Client With This Information
 - If the Add New Client button is greyed out, click Search first
 - h. Depending on your HMIS setup, you may be given three options:
 - i. Add Client ONLY – If the client is a single person with no other household members; if this option is selected, go to step 6
 - ii. Add Client and Add NEW Household – If the client is the **first** member of a multi-person household to be added
 - iii. Add Client and SEARCH Households – Only if another household member has already been entered into a household
 - i. If you are not given these options, you will be on the Client Profile page for your new client:
 - i. If the client is a single person with no other household members, go to step 6
 - ii. If the client is the **first** member of a multi-person household, click on the Households tab and click Start New Household. Go to step 5
 - Note: if you client was already in the system, check their household composition to see if it is still accurate. If so, go to step 6
 - iii. If another household member has already been entered into a household (not just entered into the system), click on the Households tab and click Search Existing Households. Search for the household member who is in a household and click the green + icon next to that household. Go to step 6
5. If Add Client and Add NEW Household was selected, add the new household in the popup window that appears

Add New Household

Household Type

Household Type *

- a. Use the dropdown menu to select the household type
- b. The client just entered will already be selected at the bottom of the page.
- c. Repeat steps 2 and 4 above for each additional household member

- If adding another client who is already in the system, search for them as described in step 2, then click the + symbol next to their name in the Client Results

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

	First	Middle	Last	Suffix
Name	<input type="text" value="john"/>	<input type="text"/>	<input type="text" value="client"/>	<input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>			
Alias	<input type="text"/>			
Social Security Number	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
U.S. Military Veteran?	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
9384	Client, Jane Anne	987-65-4321	01/01/1975		Female		1
9380	Client, John Adams	123-45-6789	01/01/2004		Male		1

Showing 1-2 of 2

- d. When all clients in the household are listed under “Selected Clients”, click “Continue”
- e. On the next screen, select Yes for the Head of Household in the Head of Household dropdown menu

Household Members

Name	Age	Head of Household	Relationship to Head of Household
(9384) Client, Jane Anne	40	Yes <input type="text"/>	Self <input type="text"/>
(9380) Client, John Adams	11	No <input type="text"/>	Son <input type="text"/>

- f. Select the relationship to the Head of Household for all other clients in the household
 - g. Click Save and Exit
6. You will now be on the Client Profile page for the client you just added. If you are on a different page, such as the summary page, click the Client Profile tab if you want to add a Client Photo

Client Information

Summary	Client Profile	Households	ROI
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- a. If a picture of the client is available, click “Change” under the illustration of a person on the right side of the screen.



Change

Clear

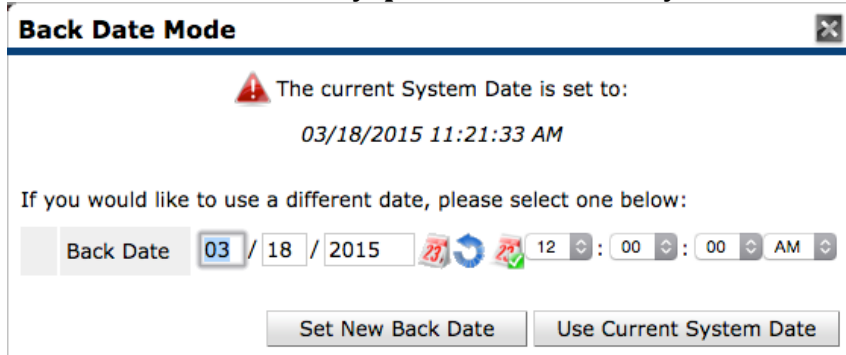
- b. Click “Choose File” in the Upload Client Image popup that appears.

A screenshot of a web application popup window titled "Upload Client Image". The window has a close button in the top right corner. It contains a form with two main sections. The first section is labeled "Name *" and includes a "Choose File" button and the text "No file chosen". The second section is labeled "Description" and contains a large, empty text input field. At the bottom of the popup, there are two buttons: "Upload" and "Cancel".

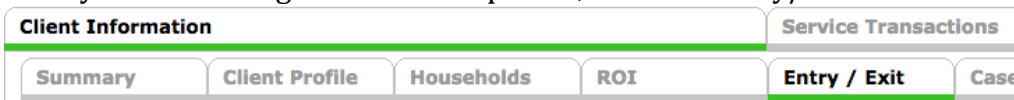
- c. Select the image of the client on your computer
- d. Click “Upload” in the Upload Client Image popup

II. Adding a Client to a Project

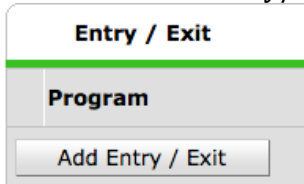
1. If you are not currently looking at the client’s profile, click “Client Point” in the menu on the left side of the screen
 - a. Search for the client by entering all or part of the client’s name and clicking “Search”
 - b. Select the client by clicking their name
 - c. At this point, you may get a popup informing you of the current system date and asking if you would like to enter backdate mode. **If you are entering data that is not from the current day, please enter the day the data was collected.**



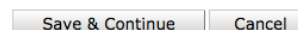
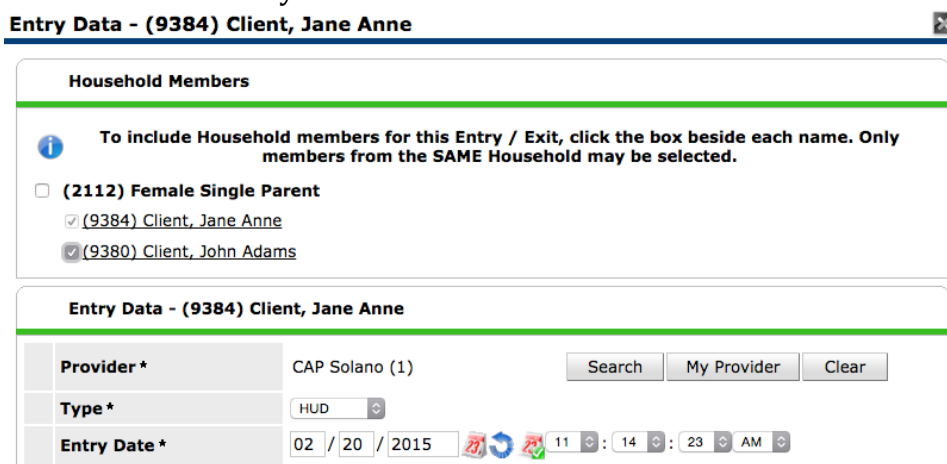
2. Once you are looking at the client’s profile, click the Entry/Exit tab



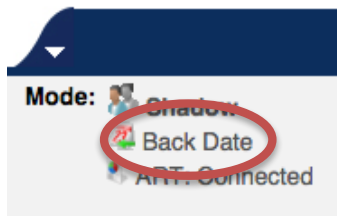
3. Click the “Add Entry/Exit” button



4. Add the client’s entry data



- a. Select the clients entering the project; other household members are **not** selected by default
 - b. By default, one project from your agency or the agency itself will be selected under Provider. If this is not the correct project, use the dropdown menu or search to select the correct project
 - NOTE: "Provider" refers to the **project, not the agency** administering the project. **Never enter clients on the agency level**
 - c. Select the Project Type using the drop-down menu. Project Type refers to the type of funding that pays for the project services the client is using. All HUD projects **must** select HUD. State and privately-funded projects should choose "Standard"
 - d. Change the entry date to the date of the client's entry into the project
 - e. Click Save & Continue
5. Fill out the Entry assessment
- a. Make sure the system date is **the day the data was collected**. If you have not already entered backdate mode and the data was collected on a different day than you are entering it, click Back Date in the upper right of the screen and enter the day the data was collected. If you are in backdate mode, the system date should display next to the Back Date option.



- b. The appropriate entry assessment should be selected on the next page. If not, select it from the list of assessments.
 - Note: All HUD-funded projects **must** fill out the HUD CoC and ESG Entry 2014 Assessment. Projects participating in the coordinated assessment pilot may **also** fill out the VI-SPDAT
 - Note: This walkthrough provides guidance for the HUD entry assessment. However, the PATH and SSVF entries are very similar.

Select an Assessment



VI-SPDAT

HUD CoC and ESG Entry 2014


- Note: When filling out an entry assessment for a client who was already in the system, information from their previous assessments will show in the entry assessment. If this is the case, you may simply check all entries to ensure they are accurate. However, if you need to change any value in the list of income, non-cash benefits, health insurance, or disabilities, **do not delete the entry or edit the values in the existing entry**. Instead, click the edit (pencil) icon, fill in the end date (or the day prior to entry, if the actual end

date is unavailable), and then add a new entry with the current information. See the guide to adding an update assessment for more information.

- c. Fill out the profile information for the selected household member
 - Consult the HUD HMIS 2014 Data Standards for further guidance
 - Note: It is the policy of the Vallejo-Solano County Continuum of Care that no client birth date shall be left with a null value. When clients do not know or will not give a birth date the interviewer should ask how old the client is or how old the client thinks he/she is. Using the age provided, calculate the birth date as January 1 that number of years prior. In cases where the client refuses to state their birth date or age, the interview will estimate the client's age in years and then calculate the birth date as January 1 that number of years prior. Whenever calculated birth dates are used, there should be a notation in the record (case notes) that this is the case.
 - Note: The Client Location element is not on the intake form because there is only one possible value, CA-518. Be sure to select it.
- d. Use the Covered by Health Insurance dropdown menu to select whether the client has health insurance coverage

Covered by Health Insurance Yes (HUD)  

- e. If the client is covered, click the Add button under Health Insurance














 **Health Insurance**

Start Date *

Add

- f. Fill out the form in the Health Insurance popup with the date the client's health insurance coverage began, the type of health insurance, and whether the client is currently covered

Health Insurance

Start Date *	02 / 23 / 2015   
Health Insurance Type	MEDICAID  
Covered?	Yes  
(HOPWA) If Private Pay Insurance, Specify	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> 
(HOPWA) If No, Reason not covered	-Select-  
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

Save

Save and Add Another

Cancel

- g. If all client's health insurance coverage has been added, click Save. If client has additional health insurance, click Save and Add Another
- h. HUD requires information on all types of health insurance, even those that the client does not have. To view all types of health insurance at once and see which have not

been answered, click HUD Verification in the right-hand corner of the Health Insurance panel

HUD Verification

- i. In the HUD Verification popup, any type of health insurance not entered will be listed as Incomplete
- j. To change all Incomplete listings at once, you may click the radio button next to No or Data Not Collected; otherwise, you may click each item individually
 - Note: All data should have been collected
- k. In the Disabilities panel, click Add if the client has a disability
 - i. In the Disabilities popup, select the type of disability the client has and set Disability Determination to Yes
 - Note: You will be able to report the disabilities the client did not have, did not know, or refused to answer in step e., below

Disabilities

Disability Type	Alcohol Abuse (HUD)  
Disability determination	Yes (HUD)  

- ii. Fill in the rest of the fields in the Disabilities popup
 - Note: Start Date is the date of project entry, project exit, or the date updated information was collected, not the date the client became disabled
 - Note: End Date is only for disabilities that are of definite duration and will be inapplicable to many clients
- l. HUD requires information on all disabilities, even those a client does not have (this is why Disability Type and Disability Determination are separate fields in the disability popup). To view all disability types at once and see which have not been answered, click HUD Verification in the right-hand corner of the Disabilities panel.

HUD Verification

- i. In the HUD Verification popup, any disability not entered will be listed as Incomplete
- ii. To change all Incomplete listings at once, you may click the radio button next to No, Client Doesn't Know, or Client Refused; otherwise, you may click each item individually
 - Note: You should not use Data Not Collected as all data should have been collected

HUD Verification: Disabilities for 03/20/2015

i Per Disability Type, the current records for Disabilities as of 03/20/2015 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 03/20/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records

- No (HUD)
- Client doesn't know (HUD)
- Client refused (HUD)
- Data not collected (HUD)
- Incomplete

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental Health Problem (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

m. In the Total Monthly Income field, enter the client's total monthly income from all sources of income

Total Monthly Income	<input type="text" value="500"/>	G
Income from Any Source	<input type="text" value="Yes (HUD)"/>	G

n. Use the Income from Any Source dropdown menu to select whether the client has any income

o. If the client has any income, click the Add button under Monthly Income

Monthly Income

Monthly Amount	Source of Income
<input checked="" type="button" value="Add"/> <input type="button" value="View Gross Income"/>	


- p. Fill out the form in the Monthly Income popup with the Amount, Source, whether the client is currently receiving income from the source, date when the client started or will start receiving the income, and date when the client will stop receiving the income, if applicable

Monthly Income

Monthly Amount	<input type="text" value="200"/> G
Source of Income	<input type="text" value="Alimony or Other Spousal Support (HUD)"/> G
If Other, Please Specify	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> G
Receiving Income Source?	<input type="text" value="Yes"/> G
Start Date *	<input type="text" value="01"/> / <input type="text" value="01"/> / <input type="text" value="2012"/> G
End Date	<input type="text" value="12"/> / <input type="text" value="31"/> / <input type="text" value="2016"/> G


- q. If all client’s income sources have been added, click Save. If client has additional income sources, click Save and Add Another
- r. Repeat steps d & e for each source of income
- s. HUD and the VA require information on all income sources, even those for which the client does not receive income. To view all income sources at once and see which have not been answered, click HUD Verification in the right-hand corner of the Monthly Income panel
- t. In the HUD Verification popup, any income source not entered will be listed as Incomplete
- u. To change all Incomplete listings at once, you may click the radio button next to No or Data Not Collected; otherwise, you may click each item individually
- Note: All data should have been collected

HUD Verification: Monthly Income for 02/23/2015



 Per Source of Income, the current records for Monthly Income as of 02/23/2015 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 02/23/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.











Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete


Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
 Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



- v. Once all listings have been marked Yes, No, or Data Not Collected, they will appear in the list of monthly income sources and a green checkmark will appear next to HUD Verification



 **Monthly Income** HUD Verification 

Monthly Amount	Source of Income
 	Worker's Compensation (HUD)
 	VA Service Connected Disability Compensation (HUD)
 	VA Non-Service Connected Disability Pension (HUD)
 	Unemployment Insurance (HUD)
 	TANF (HUD)

- w. Repeat the above process, including HUD Verification, for any non-cash benefits received by the client

Non-cash benefit from any source 

 **Non-Cash Benefits** HUD Verification 

Source of Non-Cash Benefit	Start Date *	End Date
  Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	01/01/2015	

Showing 1-1 of 1

- x. If there is only one household member, click Save & Exit when done
- y. If there is more than one household member, click Save, then select the next household member in the menu on the left side of the page.
- z. Fill out an entry assessment for all household members

III. Adding a Release of Information in ServicePoint

A signed Release of Information form is **required for all clients in ServicePoint**. If your client refuses to sign the information form, they may still be entered into ServicePoint but their data cannot be shared. To limit a client’s data to your provider only, click the lock icon at the top right corner of their profile and remove the Global sharing group by clicking the red minus icon. Contact SolanoHMIS@homebaseccc.org with any questions or concerns.

1. Click the “ROI” tab to add the client’s Release of Information

2. Click the Add Release of Information button to open the Release of Information popup

Release of Information - (9384) Client, Jane Anne

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

(2112) Female Single Parent

(9384) Client, Jane Anne

(9380) Client, John Adams

Release of Information Data

Provider *	CAP Solano (1)	Search	My Provider	Clear
Release Granted *	Yes			
Start Date *	02 / 23 / 2015			
End Date *	02 / 22 / 2016			
Documentation	Signed Statement from Client			
Witness	Joe Agency			

Save Release of Information Cancel

3. Select the household members the Release of Information applies to
 - Note: Each adult household member must sign a Release of Information. Parents may sign on behalf of children.
4. For the Provider field, click the Search button and select the project that collected the ROI
5. Use the Release Granted dropdown menu to select whether or not a release was granted
6. Enter the start date and end date of the Release of Information
 - Note: The Release of Information form must be renewed every two years for clients still receiving housing and/or services
7. Use the “Documentation” dropdown menu to select the type of Release of Information obtained

- Note: The Housing First Solano Policies and Procedures **require a signed release**
8. For the Witness field, enter the name of the person who obtained the signed release
 9. Save the ROI

IV. Changing Household Composition

Occasionally it will be necessary to add a person to an existing household. Adding the additional persons to the household correctly ensures the report reflects the clients as part of the same household rather than as separate individuals. We continue to use the Client family and will add a new member, Jud Fry Client.

Part I—Adding a New Member to the Household

The first step is to add Jud Fry Client to the household.

- 1) First, look up the Head of Household, in this case Jane Anne Client, and click on her name.

Client Results								
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	9384	Client, Jane Anne	987-65-4321	01/01/1975		Female		1
	9380	Client, John Adams	123-45-6789	01/01/2004		Male		1

Showing 1-2 of 2

- 2) On the client page, navigate to the “Households” tab. Once there, click the “Manage Household” button to open up the household editing menu.

Client Information				Service Transactions																								
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments																					
<p>▼ (2112) Female Single Parent</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Age</th> <th>Head of Household</th> <th>Relationship to Head of Household</th> <th>Joined Household</th> <th>Previous Associations</th> <th>Household Count</th> </tr> </thead> <tbody> <tr> <td>(9384) Client, Jane Anne</td> <td>41</td> <td>Yes</td> <td>Self</td> <td>02/19/2015</td> <td>0 </td> <td>1 </td> </tr> <tr> <td>(9380) Client, John Adams</td> <td>12</td> <td>No</td> <td>Son</td> <td>02/19/2015</td> <td>0 </td> <td>1 </td> </tr> </tbody> </table> <p>Manage Household</p>								Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count	(9384) Client, Jane Anne	41	Yes	Self	02/19/2015	0	1	(9380) Client, John Adams	12	No	Son	02/19/2015	0	1
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count																						
(9384) Client, Jane Anne	41	Yes	Self	02/19/2015	0	1																						
(9380) Client, John Adams	12	No	Son	02/19/2015	0	1																						

- 3) On the household editing page, click the “Add/delete Household Members” button

Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count	
(9384) Client, Jane Anne	41	Yes	Self	02 / 19 / 2015	0	1	
(9380) Client, John Adams	12	No	Son	02 / 19 / 2015	0	1	

Add/Delete Household Members Household History Report

- 4) On the Add/Delete Household Members page, click the triangular arrow next to “Add Clients to the Household.” This will expand the window do you can enter information about the new household member.

Add Clients to the Household

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name	First	Middle	Last	Suffix
	Jud	Fry	Client	
Name Data Quality	Full Name Reported			
Alias				
Social Security Number	271 - 82 - 8182			
Social Security Number Data Quality	Full SSN Reported (HUD)			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

Search Clear Add New Client With This Information

- 5) Enter the new household member’s name, Social Security Number, and Social Security Number data quality. Then click “Search” to see if the person is already listed in ServicePoint.
- 6) If the person already exists in ServicePoint, you can add the person to the household by clicking the green plus symbol next to the person’s name.
- 7) If the person does not already exist in ServicePoint, click “Add New Client with this Information.” A warning will pop up asking you to confirm that you looked through all the matches. Click “OK.”
- 8) The new household member will then show up in the “Selected Clients” section at the bottom of the page.

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
11246	Client, Jud Fry	271-82-8182					0

Showing 1-1 of 1

Continue Cancel

- 9) If there are additional household members to add, repeat steps 5-7 until everyone has been added. Once all additional household members have been added, click “Continue.”

10) On the next screen, indicate the new household member’s relationship to the head of household and the date they joined the household. When done, click “Save & Exit.”

Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count	
(9384) Client, Jane Anne	41	Yes	Self	02 / 19 / 2015	0	1	
(9380) Client, John Adams	12	No	Son	02 / 19 / 2015	0	1	
(11246) Client, Jud Fry		No	Significant other	04 / 19 / 2016	0	1	

Add/Delete Household Members Household History Report

11) You should be returned to the household tab and you should see the new household member listed

Part II—Updating the Entry/Exit Record

After editing the household as explained in part 1, follow these steps to add the family member to the Entry/Exit record:

- 1) Look up the Head of Household.
- 2) Under the Entry/Exit tab, click the pencil next to the entry date to bring up the “Edit Entry Data” window.

Client Information				Service Transactions																	
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments														
<p>Reminder: Household members must be established on Households tab before creating Entry / Exits</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Type</th> <th>Entry Date</th> <th>Exit Date</th> <th>Interims</th> <th>Follow Ups</th> <th>Client Count</th> </tr> </thead> <tbody> <tr> <td>CAP Solano (1)</td> <td>HUD</td> <td>02/20/2015</td> <td>03/29/2015</td> <td>3</td> <td>2</td> <td>2</td> </tr> </tbody> </table> <p>Add Entry / Exit Showing 1-1 of 1</p>								Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count	CAP Solano (1)	HUD	02/20/2015	03/29/2015	3	2	2
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count															
CAP Solano (1)	HUD	02/20/2015	03/29/2015	3	2	2															

3) Click the “Include Additional Household Members” button.

Household Members

To update Household members for this Entry Data, click the box beside each name.

(2112) Female Single Parent

- (9384) Client, Jane Anne (Entry Date: 02/20/2015 2:32 PM)
- (9380) Client, John Adams (Entry Date: 02/20/2015 2:32 PM)

- 4) On the “Include Additional Household Members” screen, check off the name(s) of the new household member(s).

Include Additional Household Members

Household Members

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

(2112) Female Single Parent

(9384) Client, Jane Anne

(9380) Client, John Adams

(11246) Client, Jud Fry

Continue Cancel

- 5) Click “continue”
- 6) You will then be returned to the “Include Additional Household Members” window. The new household member will now be listed.
- 7) Click “Save & Continue.”
- 8) The “Entry/Exit Data” window will then show up. At the top, you will see all the household members listed, all with the same entry date.
- a. Note: If the additional household member was with the rest of the household at the of entry (and just got forgotten/missed in your data entry), you can click on the additional household member’s name in the list of family members on the left side of the window, complete the client’s profile, and then click “Save & Exit” and you’re done! However, if this is not the case continue with the next steps.
- 9) If the additional household member has a different date of entry than the rest of the household click the pencil next to the entry date. This will open the “Edit Entry Data” window and you should see the new family member’s name at the top of the window.

10) Uncheck the original family members so only the new member(s) are checked off and then edit the entry date/time to reflect the date/time of the new family member's entry to the program:

Edit Entry Data - (11246) Client, Jud Fry ✕

Household Members

i To update Household members for this Entry Data, click the box beside each name.

(2112) Female Single Parent

(9384) Client, Jane Anne (Entry Date: 02/20/2015 2:32 PM)

(9380) Client, John Adams (Entry Date: 02/20/2015 2:32 PM)

(11246) Client, Jud Fry (Entry Date: 02/20/2015 2:32 PM)

Edit Entry Data - (11246) Client, Jud Fry

Provider	CAP Solano (1)
Type	HUD
Entry Date *	<input type="text" value="02"/> / <input type="text" value="25"/> / <input type="text" value="2015"/> <input type="button" value="📅"/> <input type="button" value="🔄"/> <input type="button" value="🗑️"/> <input type="text" value="2"/> : <input type="text" value="32"/> : <input type="text" value="44"/> PM

11) Click "Save & Continue"

12) You will then be returned to the Entry/Exit Data Window. If you look at the household information now, you should see the differing entry dates for the member(s) of the household.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * CAP Solano (1) Search My Provider Clear
Type * HUD Update

Household Members Associated with this Entry / Exit										
	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes	
	(9384) Client, Jane Anne	Yes	02/20/2015	03/29/2015			Completed program	Rental by client, with other ongoing housing subsidy (HUD)		
	(9380) Client, John Adams	No	02/20/2015	03/29/2015			Completed program	Rental by client, with other ongoing housing subsidy (HUD)		
	(11246) Client, Jud Fry	No	02/25/2015	03/29/2015			Completed program	Rental by client, with other ongoing housing subsidy (HUD)		

Include Additional Household Members Showing 1-3 of 3

13) If the household already has an exit date, click on the pencil next to the “exit date” field on the “entry/exit” tab. Input the data for the client you are adding for the exit and ensure the exit date is the same as the rest of the household and the reason for leaving and destination are the same as well.

Household Members

To update Household members for this Exit Data, click the box beside each name.

(2112) Female Single Parent

(9384) Client, Jane Anne (Exit Date: 03/29/2015 4:26 PM)

(9380) Client, John Adams (Exit Date: 03/29/2015 4:26 PM)

(11246) Client, Jud Fry (Exit Date: 03/29/2015 11:07 AM)

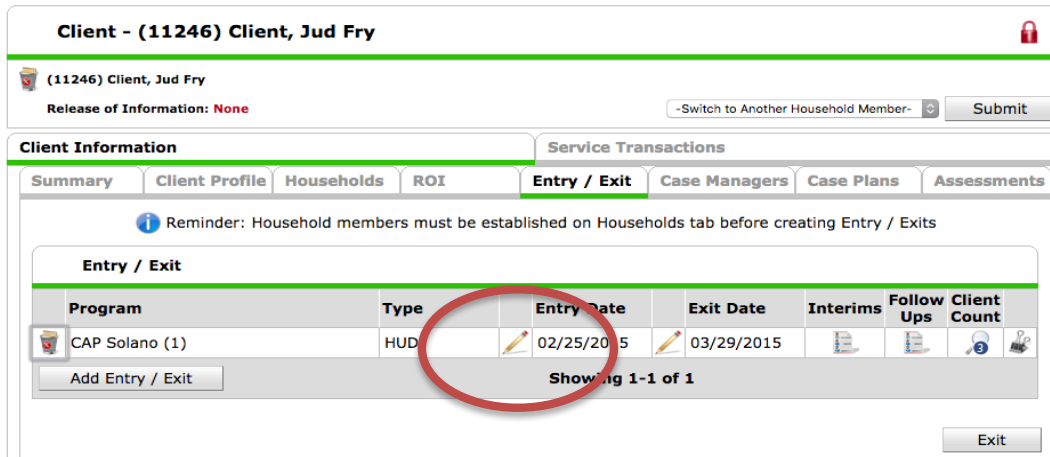
Edit Exit Data - (11246) Client, Jud Fry

Exit Date *	03 / 29 / 2015
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client, with other ongoing housing subsidy (HUD)
If "Other", Specify	
Notes	

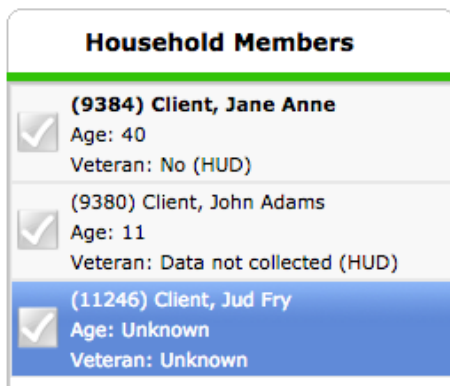
14) Once the information is entered, click “save and continue.”

Part III—Completing the Entry Assessment

- 1) When you add a new member to the household you will need to conduct an entry assessment for the new individual, in our case Jud Fry Client. Click the pencil next to the entry date from the Entry/Exit tab. The Edit Entry Data window will open. Click “Save & Continue.” This will open the Entry/Exit Data window.



- 2) On the left side of the window, under the text “Entry Assessment,” you will see a list of Household Members.



- 3) Click the name of the new household member and then wait for the assessment to load.
- 4) Complete the entry assessment for the new household member. When done, click “Save & Exit.”

Part IV—Check Your Work

The quick and easy way to determine if you correctly added the new household member is to go to the Entry/Exit tab. Look at the “Client Count” column. The number listed there should match the number of individuals in the household. In our case that number should be three. If, after adding the client, the number is not the proper number of persons in the household it means the person was not correctly entered.

You will need to delete the bad entry or else the person will show up as a single individual in your reports, rather than as part of a household. Delete it by clicking the garbage can to the left of the entry record. Then, follow the steps in the guide to create the correct entry.

If the entry is correct, then the “client count” column should match the number of persons in the household, like so:

The screenshot shows the 'Service Transactions' section with the 'Entry / Exit' tab selected. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. Below this is a table with the following data:

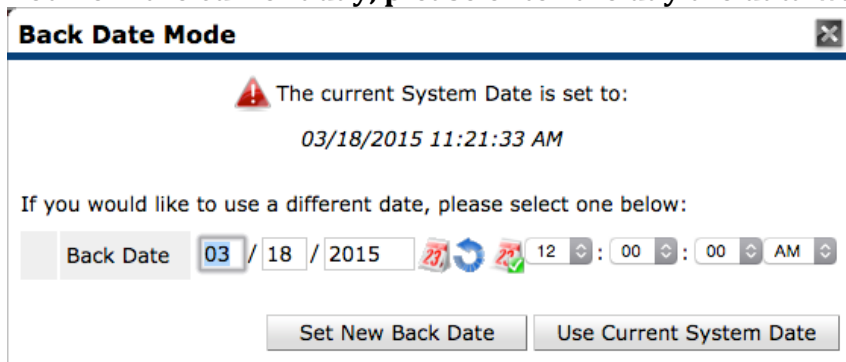
Program	Type	Entry Date	Exit Date	Interims	Follow Up	Client Count
CAP Solano (1)	HUD	02/25/2015	03/29/2015			3

The 'Client Count' column for the first entry is circled in red. Below the table is a button labeled 'Add Entry / Exit' and a status indicator 'Showing 1-1 of 1'. An 'Exit' button is located at the bottom right of the interface.

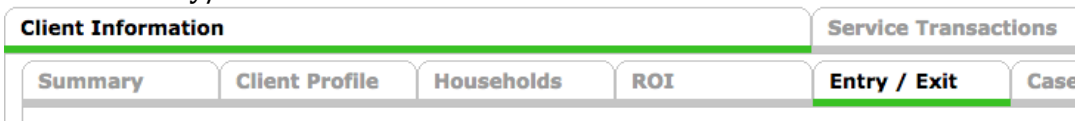
V. Adding a HUD/PATH/SSVF Update in ServicePoint

Federal funding streams require regular updates in the circumstances of clients. These updates are similar to the CoC intake, but contain only those fields that change with time, such as income sources.

1. If you are not currently looking at the client’s profile, click “Client Point” in the menu on the left side of the screen
 - a. Search for the client by entering all or part of the client’s name and clicking “Search”
 - b. Select the client by clicking their name
 - c. At this point, you may get a popup informing you of the current system date and asking if you would like to enter backdate mode. **If you are entering data that is not from the current day, please enter the day the data was collected.**



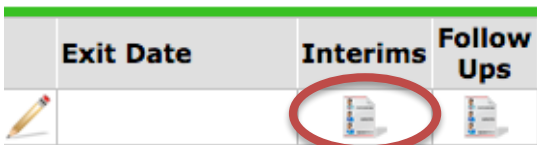
2. Click the Entry/Exit tab in the middle of the screen



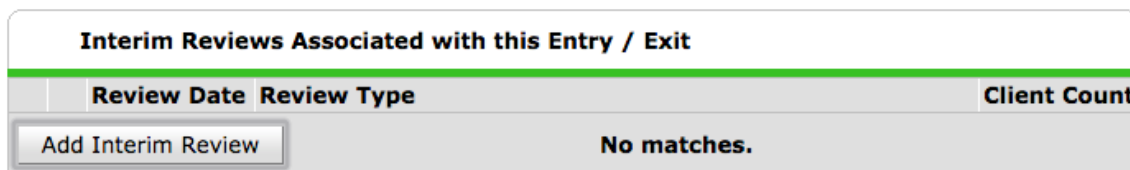
- Note: Do **not** click the Assessments tab on the far right of the screen



3. Click the icon in the Interims column next to the Entry/Exit for your project



4. Click Add Interim Review



5. Select the Interim Review Type. For the HUD-mandated annual assessment, select Annual Assessment. For other updates, select Update. If your agency conducts formal reviews at specific intervals, you may also use the 30-, 60-, 90-, 120-, and 365-day Reviews.
 - Note: **You must use Annual Assessment for your annual assessment to appear in HUD reports**

The screenshot shows a form titled "Interim Review Data". A dropdown menu is open for the "Interim Review Type" field, showing options: -Select-, 30-Day Review, 60-Day Review, 90-Day Review, 120-Day Review, 365-Day Review, Annual Assessment (checked), and Update. Other fields visible include "Entry / Exit Provider", "Entry / Exit Type", and "Review Date" (03 / 19 / 2015).

6. For Review Date, enter the date the assessment was taken
 7. Click Save & Continue
 8. Fill out the HUD CoC and ESG Update 2014
 - Note: Update should be pre-populated with information from the Entry assessment.
 - Note: This walkthrough provides guidance for the HUD annual assessment. However, the PATH and SSVF entries are very similar.
- a. If the client's health insurance coverage status has changed, use the Covered by Health Insurance dropdown menu to select whether the client has health insurance coverage

The screenshot shows a form field labeled "Covered by Health Insurance" with a dropdown menu set to "Yes (HUD)".

- b. If the client's health insurance has changed, **do not delete the record or edit the response.** Instead, you must close the old record and add a new one.
 - i. Click the pencil icon next to the old entry you wish to change

The screenshot shows a table titled "Health Insurance" with a "HUD Verification" status of "Yes" (checked). The table has columns for Start Date, Health Insurance Type, Covered?, and End Date. There are three entries. The entry for 02/20/2015 (MEDICARE, Yes) has a pencil icon circled in red, indicating it should be edited.

	Start Date *	Health Insurance Type	Covered?	End Date
	04/01/2015	State Children's Health Insurance Program	No	
	04/01/2015	MEDICAID	No	
	02/20/2015	MEDICARE	Yes	

Below the table are buttons for "Add", "Showing 6-8 of 8", "First", "Previous", "Next", and "Last".

- Note: Only five types of health insurance appear on the assessment at one time. Use the Previous and Next buttons to scroll through them.

Health Insurance		HUD Verification		
	Start Date *	Health Insurance Type	Covered?	End Date
	04/01/2015	State Children's Health Insurance Program	No	
	04/01/2015	MEDICAID	No	
	02/20/2015	MEDICARE	Yes	

Add Showing 6-8 of 8 First Previous **Next** Last

- ii. Fill in the end date. If you do not know the date the client stopped receiving the health insurance, fill in the day before the assessment was conducted.

Health Insurance

Start Date * 02 / 20 / 2015

Health Insurance Type MEDICARE

Covered? Yes

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered -Select-

End Date 03 / 31 / 2015

Print Recordset Save Save and Add Another Cancel

- iii. Leave "Covered" as Yes, as the client was covered by the health insurance during that period

Health Insurance

Start Date * 02 / 20 / 2015

Health Insurance Type MEDICARE

Covered? Yes

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered -Select-











End Date 03 / 31 / 2015

Print Recordset Save Save and Add Another Cancel



- iv. Click Save to return to the assessment
- c. If the client is covered by a different form of health insurance, click Add to create a record of it
- d. Fill out the form in the Health Insurance popup with the date the client’s health insurance coverage began, the type of health insurance, and whether the client is currently covered
- e. If the HUD Verification icon isn’t green, click the icon to enter the HUD Verification popup. In the HUD Verification popup, any type of health insurance not entered will be listed as Incomplete
- f. To change all Incomplete listings at once, you may click the radio button next to No or Data Not Collected; otherwise, you may click each item individually
 - Note: All data should have been collected
- g. If the client’s Total Monthly Income has changed, enter the new value of the client’s total monthly income from all sources of income











Total Monthly Income	<input type="text" value="500"/>	G
Income from Any Source	<input type="text" value="Yes (HUD)"/>	G

- h. Use the Income from Any Source dropdown menu to select whether the client has any income
- i. If there have been any changes in the client’s income since the client’s entry, **do not change or delete any entries in the Monthly Income subassessment.** Instead, close the entry that is no longer accurate and open a new one.
 - i. Click the pencil icon next to the old entry you wish to change

	Monthly Amount	Source of Income
 		General Assistance (HUD)
 		Earned Income (HUD)
 		Child Support (HUD)
 	US\$125.00	Alimony or Other Spousal Support (HUD)
 	US\$300.00	SSDI (HUD)

- Note: Only five income sources appear on the assessment at one time. Use the Previous and Next buttons to scroll through them.

 **Monthly Income**
HUD Verification 

	Monthly Amount	Source of Income
 		Worker's Compensation (HUD)
 		VA Service Connected Disability Compensation (HUD)
 		VA Non-Service Connected Disability Pension (HUD)
 		Unemployment Insurance (HUD)
 		TANF (HUD)

Add
View Gross Income
Showing 1-5 of 15

First
Previous
Next
Last

- ii. Fill in the end date. If you do not know the date the client stopped receiving the income source or began receiving a new amount, fill in the day before the assessment was conducted.

Receiving Income Source?	Yes
Start Date *	02 / 23 / 2015
End Date	03 / 31 / 2015

- iii. Leave Receiving Income Source as "Yes," as the client was receiving the income source during the listed period.

Receiving Income Source?	Yes
Start Date *	02 / 23 / 2015
End Date	03 / 31 / 2015

- iv. Click Save to return to the assessment

- j. If the client is still receiving the income source but in a different amount, click Add to create a new record.

Amount	US\$300.00	Source	SSDI (HUD)
Add		View Gross Income	
Showing 11-15 of 15			


- k. Fill out the form in the Monthly Income popup with the Amount, Source, whether the client is currently receiving income from the source, date when the client started or will start receiving the income, and date when the client will stop receiving the income, if applicable, then click save.

Monthly Income

Monthly Amount	375
Source of Income	SSDI (HUD)
If Other, Please Specify	
Receiving Income Source?	Yes
Start Date *	04 / 01 / 2015
End Date	
<input type="button" value="Save"/> <input type="button" value="Save and Add Another"/>	


- l. If the HUD Verification icon is not a green checkbox, click HUD Verification in the right-hand corner of the Monthly Income panel
- m. In the HUD Verification popup, any income source not entered will be listed as Incomplete
- n. To change all Incomplete listings at once, you may click the radio button next to No or Data Not Collected; otherwise, you may click each item individually
 - Note: All data should have been collected

HUD Verification: Monthly Income for 02/23/2015


 Per Source of Income, the current records for Monthly Income as of 02/23/2015 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 02/23/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.











Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete


Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
 Alimony or Other Spousal Support (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recession or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>


- o. Once all listings have been marked "Yes," "No," or "Data Not Collected," they will appear in the list of monthly income sources and a green checkmark will appear next to HUD Verification



Monthly Income HUD Verification 

Monthly Amount	Source of Income
 	Worker's Compensation (HUD)
 	VA Service Connected Disability Compensation (HUD)
 	VA Non-Service Connected Disability Pension (HUD)
 	Unemployment Insurance (HUD)
 	TANF (HUD)

- p. Repeat the above process, including HUD Verification, for any non-cash benefits received by the client that have changed in value

Non-cash benefit from any source Yes (HUD) 

Non-Cash Benefits HUD Verification 

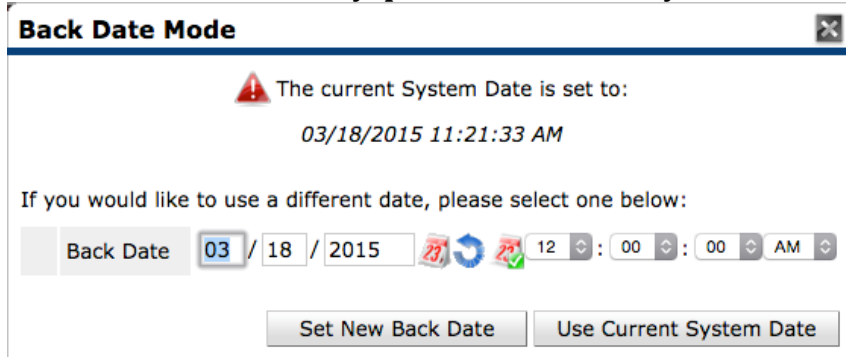
Source of Non-Cash Benefit	Start Date *	End Date
  Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	01/01/2015	

Add Showing 1-1 of 1

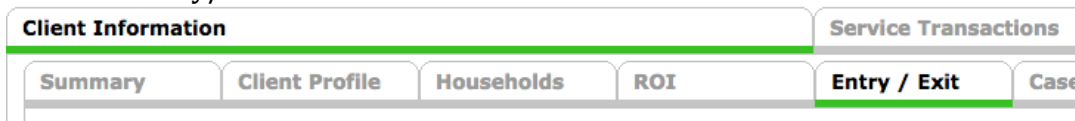
- Note: You must also add an end date to any existing non-cash benefits that have changed in value and add a new record for the current value of the benefit.
9. Once all fields have been filled out, click Save to save the assessment.
 10. You may also print a copy of the assessment.
 - Note: Paper copies of the assessment should be properly stored to prevent the unauthorized release of client information.

VI. Adding a Follow-Up VI-SPDAT in ServicePoint

1. If you are not currently looking at the client’s profile, click “Client Point” in the menu on the left side of the screen
 - a. Search for the client by entering all or part of the client’s name and clicking “Search”
 - b. Select the client by clicking their name
 - c. At this point, you may get a popup informing you of the current system date and asking if you would like to enter backdate mode. **If you are entering data that is not from the current day, please enter the day the data was collected.**



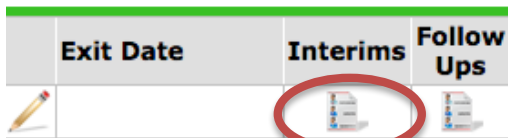
2. Click the Entry/Exit tab in the middle of the screen



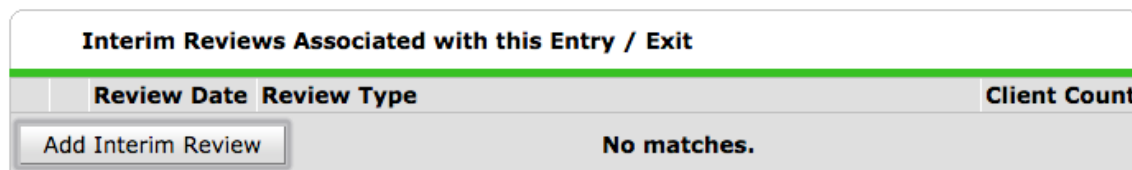
- Note: Do **not** click the Assessments tab on the far right of the screen



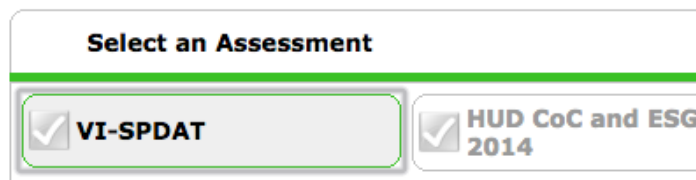
3. Click the icon in the Interims column next to the Entry/Exit for your project



4. Click Add Interim Review



5. Select the VI-SPDAT from the listed assessments.



6. Click Add on the VI-SPDAT; any previous VI-SPDATs will be listed
 - Note: Always add a new VI-SPDAT; never edit an old VI-SPDAT

The screenshot shows a form titled "VI-SPDAT" with a search icon. Below the title is a table with a header row containing the text "Start Date *". The first data row contains a pencil icon, a trash can icon, and the date "02/20/2015". Below the table is a button labeled "Add".

7. Under Start Date, enter the day the follow-up VI-SPDAT was administered

The screenshot shows the "Start Date *" field with the date "03 / 02 / 2015" entered. To the right of the date are three calendar icons: a red one with "23", a blue one with a refresh symbol, and another red one with "23" and a green "G" icon.

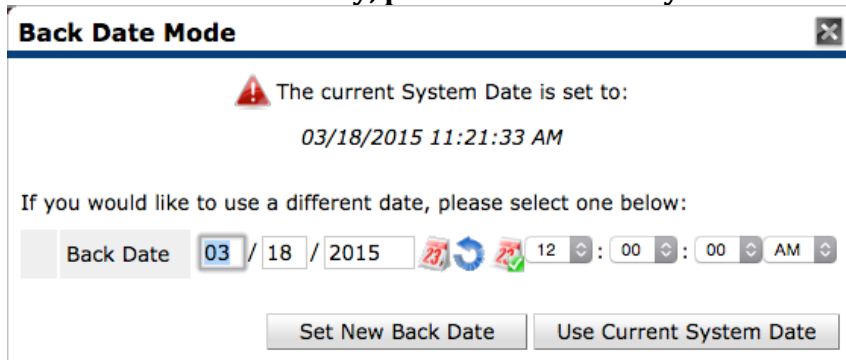
8. Fill out the rest of the VI-SPDAT as normal & Save
9. You should see your new VI-SPDAT listed with previous VI-SPDATs

The screenshot shows the "VI-SPDAT" form with two rows of data. The first row has a pencil icon, a trash can icon, and the date "03/02/2015". The second row has a pencil icon, a trash can icon, and the date "02/20/2015". Below the table is a button labeled "Add".

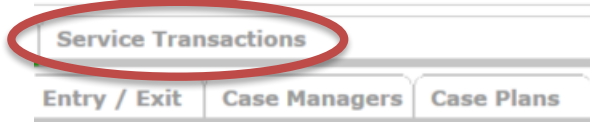
VII. Tracking Services Provided in ServicePoint

PATH, RHY, HOPWA, and SSVF-funded projects must track services in HMIS. HUD-funded projects are not currently required to track services.

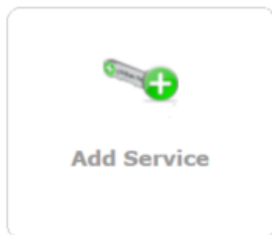
1. If you are not currently looking at the client’s profile, click “Client Point” in the menu on the left side of the screen
 - a. Search for the client by entering all or part of the client’s name and clicking “Search”
 - b. Select the client by clicking their name
 - c. At this point, you may get a popup informing you of the current system date and asking if you would like to enter backdate mode. **If you are entering data that is not from the current day, please enter the day the data was collected.**



2. Click the Service Transactions tab on the right half of the screen
 - Note: The Service Transactions tab is above the Entry/Exit tab



3. Click the Add Service icon



4. Select the project providing the services in the Service Provider dropdown
5. Enter the Start Date for the service. It should default to the system date

Start Date *	03 / 29 / 2015	2	: 00	: 00	PM	
End Date	03 / 29 / 2015	3	: 00	: 00	PM	
Service Type *	Case/Care Management (PH-1000)					Look Up
Provider Specific Service	-Select-					

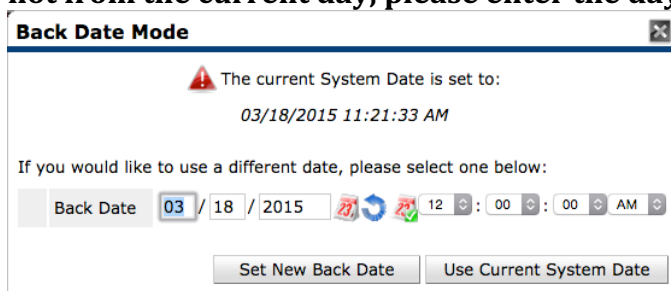
Save & Continue

6. If the service was of definite duration, such as one hour of case management, enter the end date. It should default to the same date as the Start Date.
7. Select the type of service provided from the Service Type dropdown menu
 - Note: If your provider is not set up with a Service Type dropdown quicklist, please contact SolanoHMIS@homebaseccc.org
 - a. If you do not have a Service Type quicklist or are providing a service not in the quicklist, you must enter it manually. Click Look Up and search the taxonomy for the service provided.
8. Provider Specific Service is only for the rare service that is not listed in the extensive taxonomy under Look Up. If your provider needs to track such a service, please contact SolanoHMIS@homebaseccc.org to have it added
9. Click Save & Continue
10. You will now be on the Edit Service page. Every field on here is **optional** and will not be covered by this walkthrough. Only the date and type of service entered on the previous page are required by funding programs.

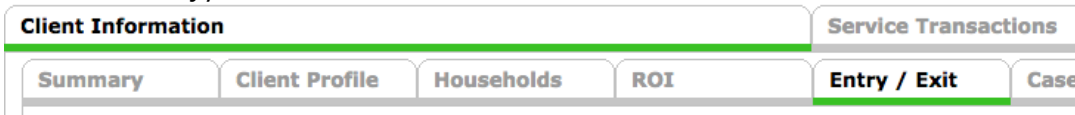
VIII. Exiting a Client from a Project in ServicePoint

When you have stopped providing services to a client, it is important to exit them from the project. Failure to do so will affect data quality and make it more difficult for the client to obtain services from other providers.

1. If you are not currently looking at the client’s profile, click “Client Point” in the menu on the left side of the screen
 - a. Search for the client by entering all or part of the client’s name and clicking “Search”
 - b. Select the client by clicking their name
 - c. At this point, you may get a popup informing you of the current system date and asking if you would like to enter backdate mode. **If you are entering data that is not from the current day, please enter the day the data was collected.**



2. Click the Entry/Exit tab in the middle of the screen



3. Click the pencil icon next to Exit Date for the Entry/Exit for your project

Entry Date	Exit Date	Interims
02/20/2015		

4. If there is more than one household member associated with the entry, select the household members who are exiting; household members are not automatically selected

Household Members

To update Household members for this Exit Data, click the box beside each name.

- (2112) Female Single Parent
 - (9384) Client, Jane Anne
 - (9380) Client, John Adams

Edit Exit Data - (9384) Client, Jane Anne

Exit Date *	03 / 29 / 2015 4 : 26 : 59 PM
Reason for Leaving	Completed program
If "Other", Specify	<input type="text"/>
Destination *	Rental by client, with other ongoing housing subsidy (HUD)
If "Other", Specify	<input type="text"/>

5. Enter the client’s Exit Date, Reason for Leaving, and Destination. Note that Exit Date and Destination are both HUD-required fields.
6. Click Save & Continue
7. Fill out an exit assessment for **all exiting clients**. Values from the most recent assessment should be pre-populated into the exit assessment
 - If more than one client in a household is exiting, you can select the additional household members by clicking their names in the Household Members list to the left of the Exit Assessment.

Household Members	HUD CoC and ESG Exit 2014
<input checked="" type="checkbox"/> (9384) Client, Jane Anne Age: 40 Veteran: No (HUD)	Total Monthly Income <input type="text" value="450"/>
<input checked="" type="checkbox"/> (9380) Client, John Adams Age: 11 Veteran: Data not collected (HUD)	Income from Any Source <input type="text" value="Yes (I"/>
	<input type="text" value=""/> Monthly Income