



HOW TO RE-ADD A CLIENT TO AN ENTRY USING THE DUPLICATE CLIENT METHOD

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In this document you will find the workflow for re-entering client on an entry they have previously been a part of. This workflow includes creating a duplicate client, adding them into the household, including them on the current entry, and finally merging the duplicate and existing client records.

The following workaround is suggested to re-add a client to an entry after they have previously been exited. This workflow is preferred so that the client is correctly counted for Length of Stay in reporting. Reports use the "last episode" for these calculations if you create a new Entry/Exit to reflect re-entry the calculations will not include the previous episode. If you use the duplicate client method described below it will include both episodes in the calculation.

In my example below you can see that my client, John Doe, has an associated entry and exit.

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*
Type*

Household Members Associated with this Entry / Exit									
	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(12) Doe, Jane	No	01/18/2019						
	(629) Doe, Jill	No	01/18/2019						
	(962) Doe, John	No	01/20/2019	02/22/2019				Rental by client, with other ongoing housing subsidy (HUD)	

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If John Doe returns to our program and would like to re-enter with his family we will begin with the following workflow.

1. Create a new, duplicate client.
 2. Go to a client that is included in the existing household and add our new duplicate client.
- 2a. Click on Mange Household

Client - (12) Doe, Jane

(12) Doe, Jane
 Release of Information: Ends 04/15/2021

Client Information		Service Transactions																																			
Summary	Client Profile	Case Managers	Entry / Exit	Households	ROI	Assessments	Case Plans	Activities	Measurements																												
(139) Adult(s) & Children (under 18) <table border="1" style="width: 100%;"> <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>(12) Doe, Jane</td> <td>44</td> <td>No</td> <td></td> <td>02/27/2019</td> <td>0 </td> <td>2 </td> </tr> <tr> <td>(629) Doe, Jill</td> <td>39</td> <td>No</td> <td></td> <td>09/20/2012</td> <td>0 </td> <td>3 </td> </tr> <tr> <td>(962) Doe, John</td> <td></td> <td>No</td> <td></td> <td>09/20/2012</td> <td>0 </td> <td>1 </td> </tr> </tbody> </table> <input type="button" value="Manage Household"/>										Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count	(12) Doe, Jane	44	No		02/27/2019	0	2	(629) Doe, Jill	39	No		09/20/2012	0	3	(962) Doe, John		No		09/20/2012	0	1
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count																															
(12) Doe, Jane	44	No		02/27/2019	0	2																															
(629) Doe, Jill	39	No		09/20/2012	0	3																															
(962) Doe, John		No		09/20/2012	0	1																															

2b. Click on Add/Delete Household Members










Household Information - (139) Adult(s) & Children (under 18)



 **(139) Adult(s) & Children (under 18)**

Household Type *	Adult(s) & Children (under 18) ▾
Income	US\$12.00 monthly (US\$144.00 annual) 🔍
Client Count	3

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
	(12) Doe, Jane	44	No ▾	-Select- ▾	02 / 27 / 2019  	0 🔍	2 🔍
	(629) Doe, Jill	39	No ▾	-Select- ▾	09 / 20 / 2012  	0 🔍	3 🔍
	(962) Doe, John		No ▾	-Select- ▾	09 / 20 / 2012  	0 🔍	1 🔍

2c. Select your duplicate client and add to household.

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	6132 Doe, John Duplicate						0 🔍

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Our new household now contains 4 members containing both our original and duplicate client.

Household Information - (139) Adult(s) & Children (under 18)



(139) Adult(s) & Children (under 18)

Save

Save & Exit

Exit

Household Type *	Adult(s) & Children (under 18)
Income	US\$12.00 monthly (US\$144.00 annual)
Client Count	4

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(12) Doe, Jane	44	No	-Select-	02 / 27 / 2019	0	2
(629) Doe, Jill	39	No	-Select-	09 / 20 / 2012	0	3
(962) Doe, John		No	-Select-	09 / 20 / 2012	0	1
(6132) Doe, John Duplicate		No	-Select-	04 / 18 / 2019	0	1

Add/Delete Household Members Household History Report

3. Add our duplicate client to the original entry.

3a. Go to the original entry and select Save & Continue to enter the main entry window.

3b. Click to Include Additional Household Members

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 *	Bowman Systems, LLC (0)	Search	My Provider	Clear
Type *	Basic	Update		

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(12) Doe, Jane	No	01/18/2019						
(629) Doe, Jill	No	01/18/2019						
(962) Doe, John	No	01/20/2019	02/22/2019				Rental by client, with other ongoing housing subsidy (HUD)	

Include Additional Household Members Showing 1-3 of 3

3c. Select our new client and confirm that the Entry Date is BEFORE the clients previous exit date. *We will correct the date in the next step.

Edit Project Start Data - (12) Doe, Jane






Household Members

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

- (139) Adult(s) & Children (under 18)**
- (12) Doe, Jane (Entry Date: 01/18/2019 10:14 AM)
 - (629) Doe, Jill (Entry Date: 01/18/2019 10:14 AM)
 - (962) Doe, John (Entry Date: 01/20/2019 10:14 AM)
 - (6132) Doe, John Duplicate

Edit Project Start Data - (12) Doe, Jane

Provider	Bowman Systems, LLC (0)
Type	Basic
Project Start Date *	<input type="text" value="02"/> / <input type="text" value="01"/> / <input type="text" value="2019"/>    <input type="text" value="10"/> : <input type="text" value="14"/> : <input type="text" value="19"/> AM

Save & Continue

Cancel

Your Entry now contains both the original and duplicate client.





















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 *	Bowman Systems, LLC (0)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Type *	Basic	<input type="button" value="Update"/>		

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(12) Doe, Jane	No	 01/18/2019						
	(629) Doe, Jill	No	 01/18/2019						
	(962) Doe, John	No	 01/20/2019	 02/22/2019				Rental by client, with other ongoing housing subsidy (HUD)	
	(6132) Doe, John Duplicate	No	 02/01/2019						

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Entry Assessment

Exit Assessment

3d. Click on the edit pencil beside our duplicate clients Project Start Date.

Note that only our duplicate client is checked in this window. Enter the correct entry date on this window.

Edit Project Start Data - (6132) Doe, John Duplicate



Household Members

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

(139) Adult(s) & Children (under 18)

(12) Doe, Jane (Entry Date: 01/18/2019 10:14 AM)

(629) Doe, Jill (Entry Date: 01/18/2019 10:14 AM)

(962) Doe, John (Entry Date: 01/20/2019 10:14 AM)

(6132) Doe, John Duplicate (Entry Date: 02/01/2019 10:14 AM)

Include Additional Household Members

Edit Project Start Data - (6132) Doe, John Duplicate

Provider Bowman Systems, LLC (0)

Type Basic

Project Start Date * 04 / 18 / 2019 8 : 00 : 08 PM

Save & Continue

Cancel

Now you can see that our duplicate client has the correct entry date.

Entry/Exit Data



i 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 * Bowman Systems, LLC (0)

Search

My Provider

Clear

Type * Basic

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(12) Doe, Jane	No	01/18/2019						
	(629) Doe, Jill	No	01/18/2019						
	(962) Doe, John	No	01/20/2019	02/22/2019				Rental by client, with other ongoing housing subsidy (HUD)	
	(6132) Doe, John Duplicate	No	04/18/2019						

Include Additional Household Members

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Entry Assessment

Exit Assessment

4. Now we will merge the clients.

For a detailed guide on the client merge process please review the SP5 Client Merge Guide found in the Customer Community under the HACS ServicePoint Admin library.

Confirm that the duplicate client is the Source and our original client is the Destination.

(962) Doe, John Merge Action <input type="radio"/> Source <input checked="" type="radio"/> Destination <input type="radio"/> NOT Included <input type="radio"/> Mark as Distinct	(6132) Doe, John Duplicate Merge Action <input checked="" type="radio"/> Source <input type="radio"/> Destination <input type="radio"/> NOT Included <input type="radio"/> Mark as Distinct
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- Return to the original client and you can now see that the entry shows our original client Entering, Exiting, and Re-Entering on the same entry.

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 *	Bowman Systems, LLC (0)	Search	My Provider	Clear
Type *	Basic	Update		

Household Members Associated with this Entry / Exit									
	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(12) Doe, Jane	No	01/18/2019						
	(629) Doe, Jill	No	01/18/2019						
	(962) Doe, John Duplicate	No	04/18/2019						
	(962) Doe, John Duplicate	No	01/20/2019	02/22/2019				Rental by client, with other ongoing housing subsidy (HUD)	

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Entry Assessment	Exit Assessment
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