

Collaborate. Coordinate. Evaluate.

ClientPoint Data Entry Workflow

ServicePoint v5.x



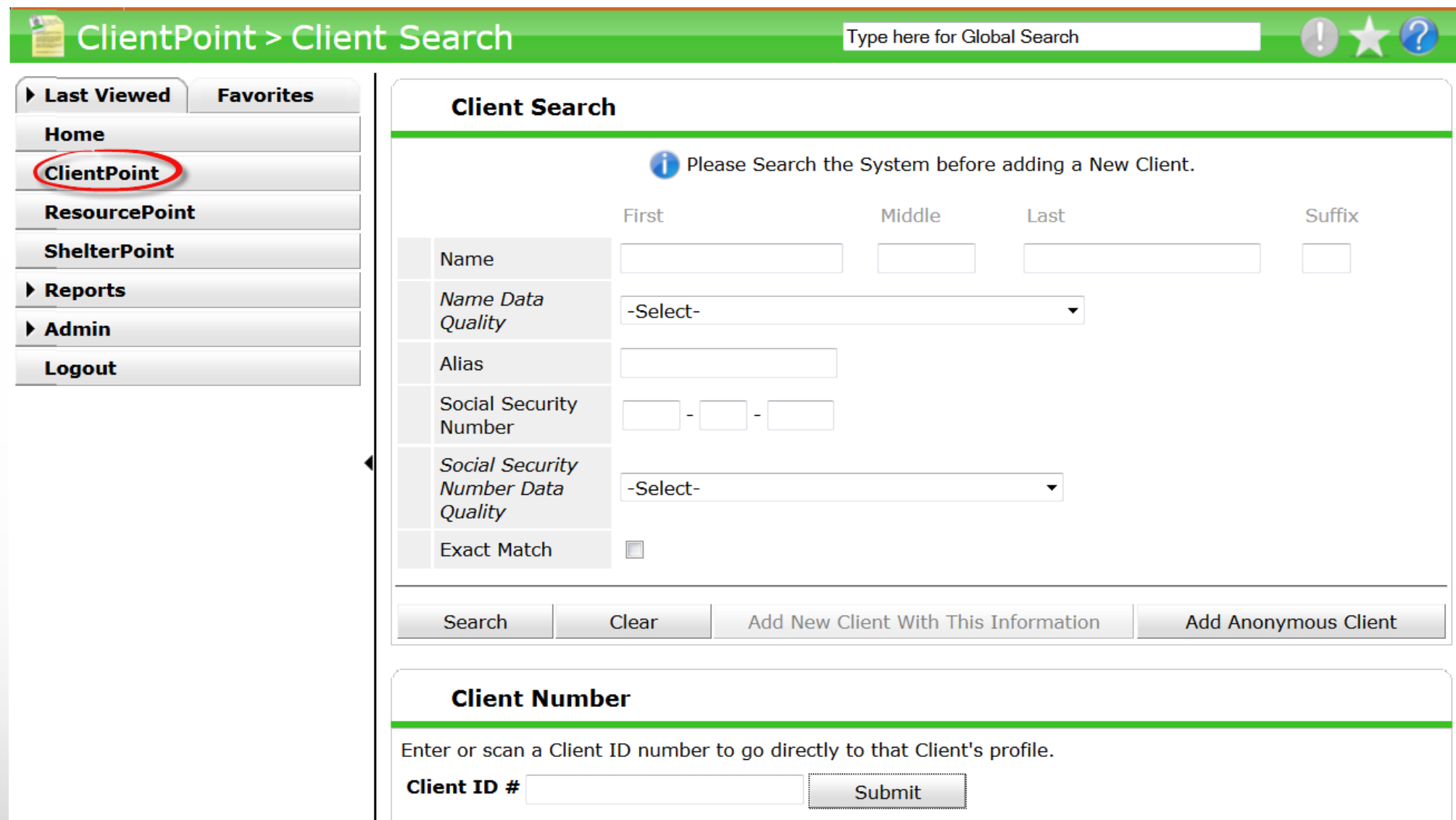
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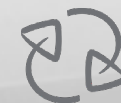


ClientPoint

“The filing cabinet!”

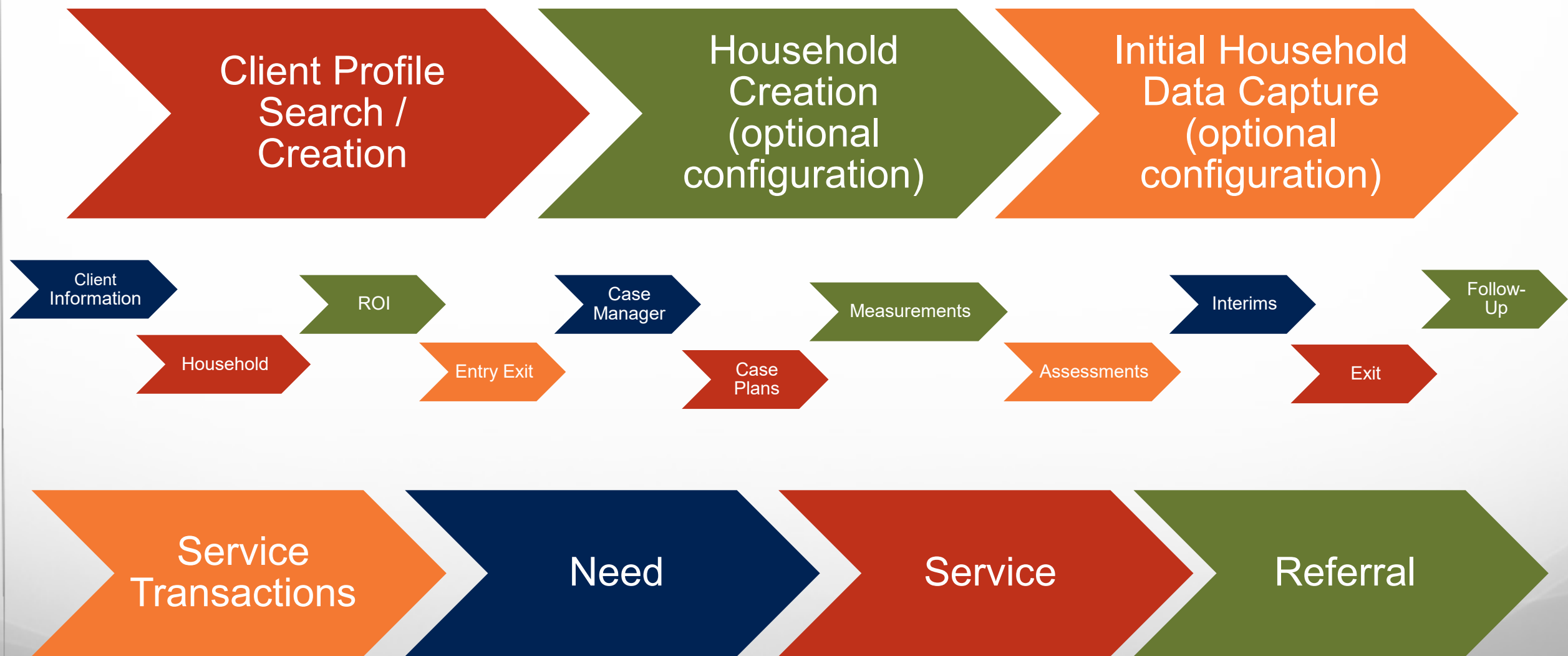


The screenshot shows the ClientPoint Client Search interface. At the top, there is a green navigation bar with the text "ClientPoint > Client Search" and a search input field labeled "Type here for Global Search". Below the navigation bar is a sidebar menu with options: Last Viewed, Favorites, Home, ClientPoint (circled in red), ResourcePoint, ShelterPoint, Reports, Admin, and Logout. The main content area is titled "Client Search" and contains a message: "Please Search the System before adding a New Client." Below this message are several input fields: Name (split into First, Middle, Last, and Suffix), Name Data Quality (a dropdown menu), Alias, Social Security Number (split into three boxes), Social Security Number Data Quality (a dropdown menu), and Exact Match (a checkbox). At the bottom of the search section are four buttons: Search, Clear, Add New Client With This Information, and Add Anonymous Client. Below the search section is a "Client Number" section with the instruction "Enter or scan a Client ID number to go directly to that Client's profile." and a form with a "Client ID #" input field and a "Submit" button.



Data Entry Made Easy!

Follow the prompt/pop-up window, then follow the tabs through the record (from left to right).



Client Profile
Search /
Creation

ClientPoint > Client Search

Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Name Data Quality	-Select-				
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	-Select-				
Exact Match	<input type="checkbox"/>				

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

➤ Search for your Client Record via the Name(s), Alias, SSN, or Client ID Number field(s).

Note: The system will not allow adding a new client until you click "Search" first.



Client Profile Search / Creation

Matching Client Records will be listed under the “Client Results” section (at the bottom of the page).

➤ If a matching record exists, click the pencil/edit icon to the left of the Client’s Name (and skip the next slide).

➤ If no match exists, create a new file folder for the client by clicking on the “Add New Client With This Information” button to create a new Client Profile.

Search	Clear	Add New Client With This Information	Add Anonymous Client
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Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Client Results

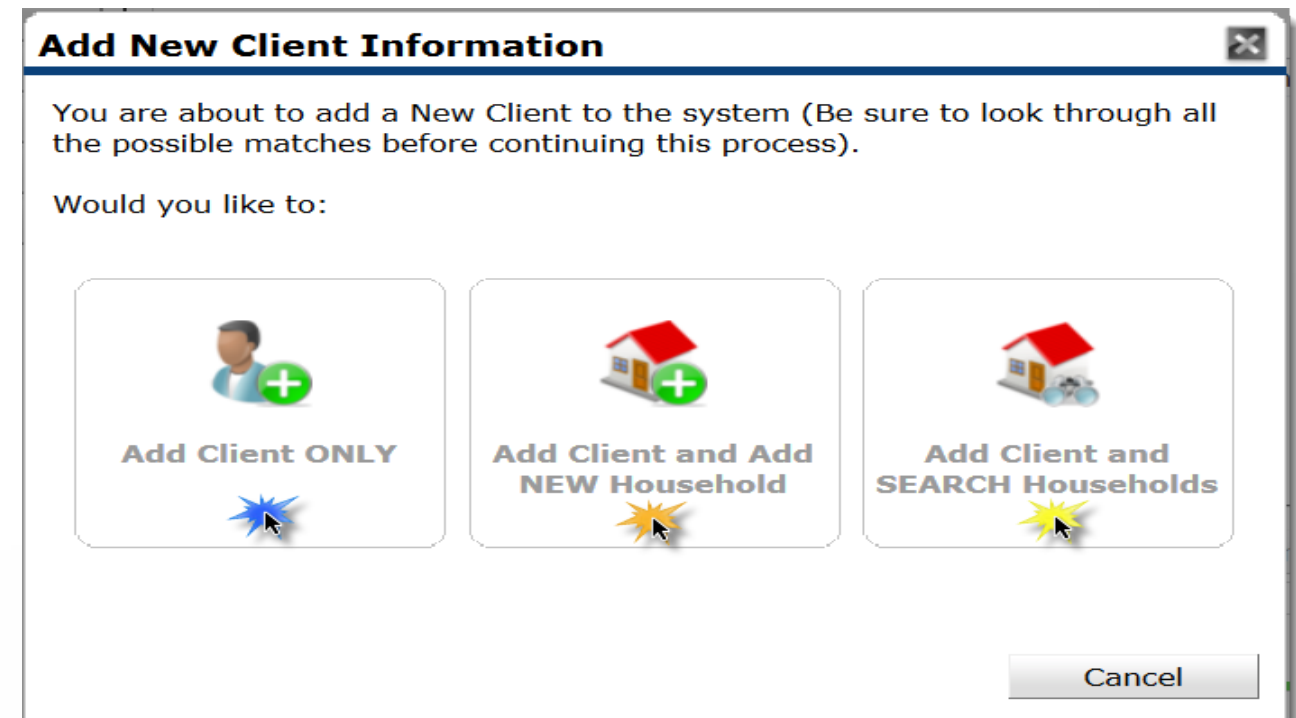
ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							



Client Profile Search / Creation

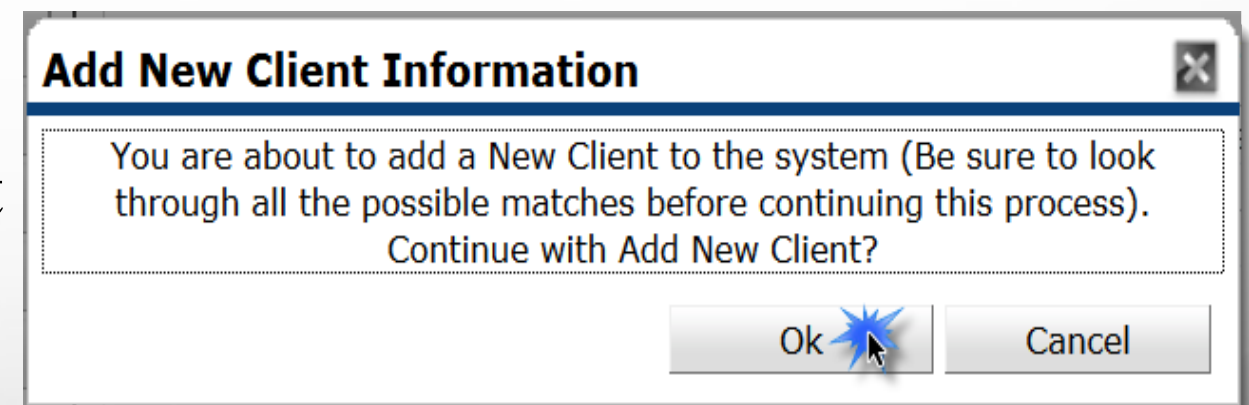
You may see this pop-up display:

- Click on the appropriate button depending on if you are entering a single or household.
- Skip to Slide 11, the Household Section, if selecting the middle “Add NEW Household” button



If Add Household Option is not set-up:

- Click Okay in the “Add New Client Information” pop-up.



*Note: The Household Option can be set in
the Provider Admin->Module Settings
->ServicePoint Settings*





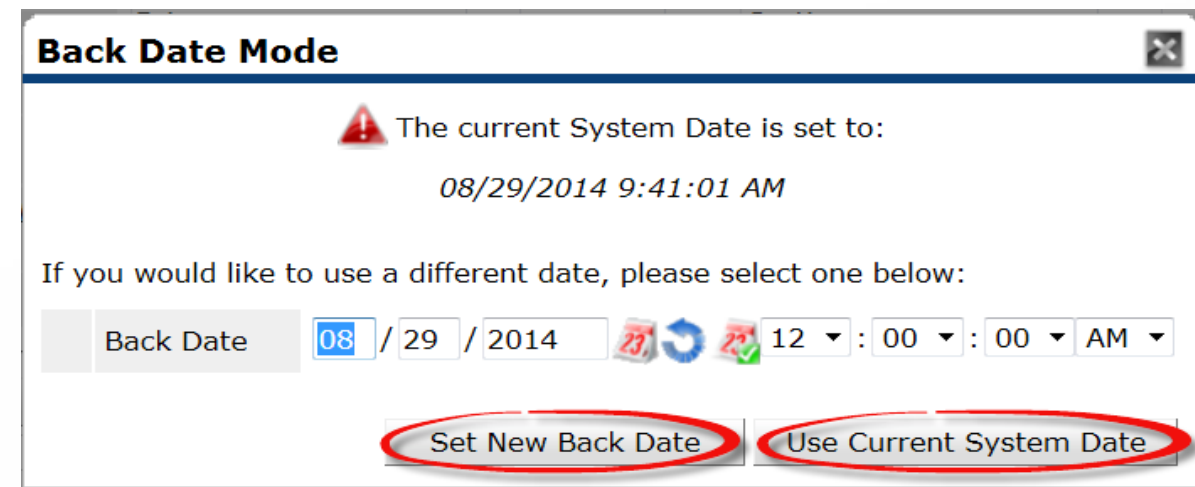
Client Profile
Search /
Creation

Back Date allows the user to enter client and assessment information for a date prior to the current date.

➤ If the back date prompt is turned on in your system, the “Back Date Mode” pop-up will display before you can enter into the client record.

- If back-dating, change the date and then click Set New Back Date. If not back-dating, just click the Use Current System Date button.

Note: To turn the pop-up on or off, go into provider admin->Module Settings-> ClientPoint



Back Date Mode

⚠ The current System Date is set to:
08/29/2014 9:41:01 AM

If you would like to use a different date, please select one below:

Back Date 08 / 29 / 2014 12 : 00 : 00 AM

Set New Back Date Use Current System Date



Client Information

“Client Information Tab”

Depending on the implementation settings, once in a client record there are various options on which tab is the default so if the Client Profile is not active, click on it to start there.

Client - (7) Taylor, Amee 🔒

(7) Taylor, Amee
 Release of Information: None -Switch to Another Household Member- ▾ Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Client Record
Issue ID Card

Name	Taylor, Amee
Name Data Quality	Full Name Reported
Alias	
Social Security	222-22-2222
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	
Age	

Change
Clear

Client Demographics
🔒






Client Information

- Click the pencils (edit button) to add, edit or update.

Note: These data elements create the client's unique ID. Altering this data could alter the Unique Identifier for reporting in the database.

- Custom Assessment fields may need to be completed.

Summary	Client Profile	Households
 Client Record		
Name	Taylor, Amee	
Name Data Quality	Full Name Reported	
Alias		
Social Security	222-22-2222	
SSN Data Quality	Full SSN Reported (HUD)	
U.S. Military Veteran?		
Age	35	
 Client Demographics		
Date of Birth	08/01/1979	
Date of Birth Type	Full DOB Reported (HUD)	
Gender	Female	
If Other Gender, specify		
Primary Race	Asian (HUD)	
Secondary Race		
Ethnicity	Non-Hispanic/Non-Latino (HUD)	
 Additional Profile Information		

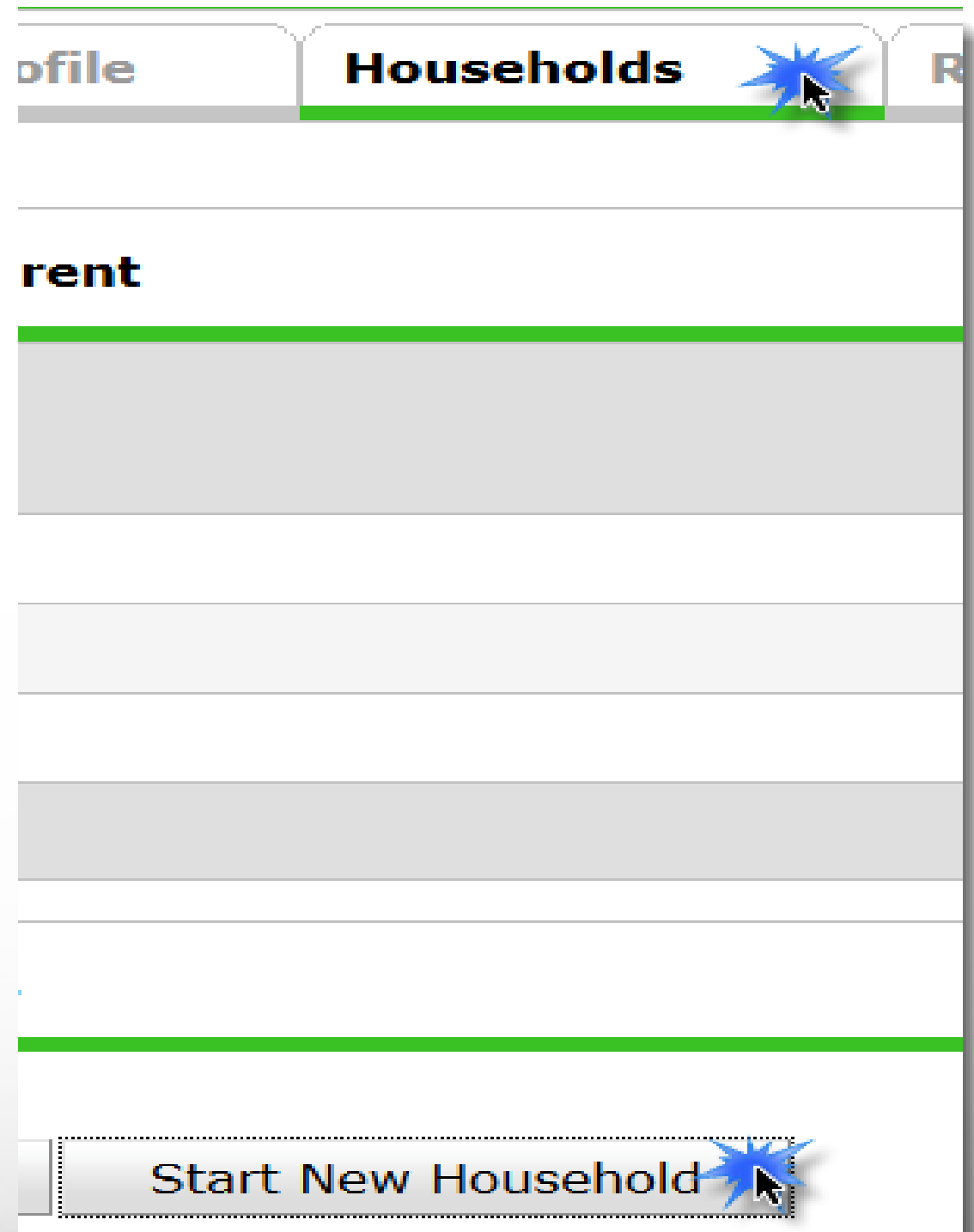




Household
Creation

To Add a New Household:

- Click the Household Tab
- Click Start New Household



Household Creation

Each household member needs to have a separate client record created and this household area is like a virtual paperclip connecting each file as a household.

- When the Household Pop-Up displays, select the Household Type
- Search for each additional household member.
 - If the additional household member does not already exist in the database, click “Add New Client With This Information”
 - *This pop-up may display each time you add a new record.*

Household Type

Household Type*

Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	Taylor	<input type="text"/>	
Name Data Quality	<input type="text" value="-Select-"/>				
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	<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 #

Selected Clients







ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
7	Taylor, Ameer	222-22-2222					0

Showing 1-1 of 1

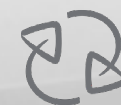
Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?

Household Creation

Client Results							
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							
Selected Clients							
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
7	Taylor, Amee	222-22-2222					0 
 8	Taylor, Amealita	985-58-8877					0 
 9	Taylor, Ameen	333-33-3333					0 
Showing 1-3 of 3							
					Continue		Cancel

- Clients added to the household will appear at the bottom of the page under the “Selected Clients” section.
- Click “Continue” button once all household members have been added to the group.



Household Creation

Household Information - (1) Female Single Parent

(1) Female Single Parent Save Save & Exit Exit

Household Type *	Female Single Parent
Income	US\$0.00 monthly (US\$0.00 annual)
Client Count	3

Household Members						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(7) Taylor, Amee		No	-Select-	09 / 01 / 2014	0	1
(8) Taylor, Amealita		No	-Select-	09 / 01 / 2014	0	1
(9) Taylor, Ameenon		No	-Select-	09 / 01 / 2014	0	1

Add/Delete Household Members Household History Report

Previous Household Members

This Household does not have any previous members.

➤ Complete:

- **Head of Household** - Defaults to “No” so only change to “Yes” on the one person that is the Head of Household.
- **Relationship to Head of Household** – Select the appropriate relationship. The client that is head of household should have “Self” in this field.
- **Joined Household** - Only change *if different from Back Date or Current System Date*

➤ Click the SAVE button.

➤ Previous Household Members can be viewed by clicking the black arrow/triangle icon to expand the page section.































Household

It is an option to the provider to attach assessments for clients within the household area.

- Click on each client name on the left-hand side of the Household Pop-up screen.
- If necessary, complete an assessment for each client..
- Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved.
- Click Save and Exit once assessments are completed for the household.

Previous Household Members

Individual Client Assessment

Household Members	Client Record																				
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> (7) Taylor, Amee Age: 35 <input type="checkbox"/> (8) Taylor, Amealita Age: Unknown <input type="checkbox"/> (9) Taylor, Ameen Age: Unknown 	<div style="text-align: right;">Issue ID Card </div> <table border="1"> <tr><td>Name</td><td>Taylor, Amee</td></tr> <tr><td>Name Data Quality</td><td>Full Name Reported</td></tr> <tr><td>Alias</td><td></td></tr> <tr><td>Social Security</td><td>222-22-2222</td></tr> <tr><td>SSN Data Quality</td><td>Full SSN Reported (HUD)</td></tr> <tr><td>U.S. Military Veteran?</td><td></td></tr> <tr><td>Age</td><td></td></tr> </table> <div style="background-color: yellow; padding: 5px; text-align: right;"> HUD CoC and ESG Entry Date: 09/01/2014 12:00:00 AM  </div> <table border="1"> <tr><td>Date of Birth</td><td>08 / 01 / 1979    </td></tr> <tr><td>Date of Birth Type</td><td>Full DOB Reported (HUD)  </td></tr> <tr><td>Primary Race</td><td>Asian (HUD)  </td></tr> </table>	Name	Taylor, Amee	Name Data Quality	Full Name Reported	Alias		Social Security	222-22-2222	SSN Data Quality	Full SSN Reported (HUD)	U.S. Military Veteran?		Age		Date of Birth	08 / 01 / 1979    	Date of Birth Type	Full DOB Reported (HUD)  	Primary Race	Asian (HUD)  
Name	Taylor, Amee																				
Name Data Quality	Full Name Reported																				
Alias																					
Social Security	222-22-2222																				
SSN Data Quality	Full SSN Reported (HUD)																				
U.S. Military Veteran?																					
Age																					
Date of Birth	08 / 01 / 1979    																				
Date of Birth Type	Full DOB Reported (HUD)  																				
Primary Race	Asian (HUD)  																				

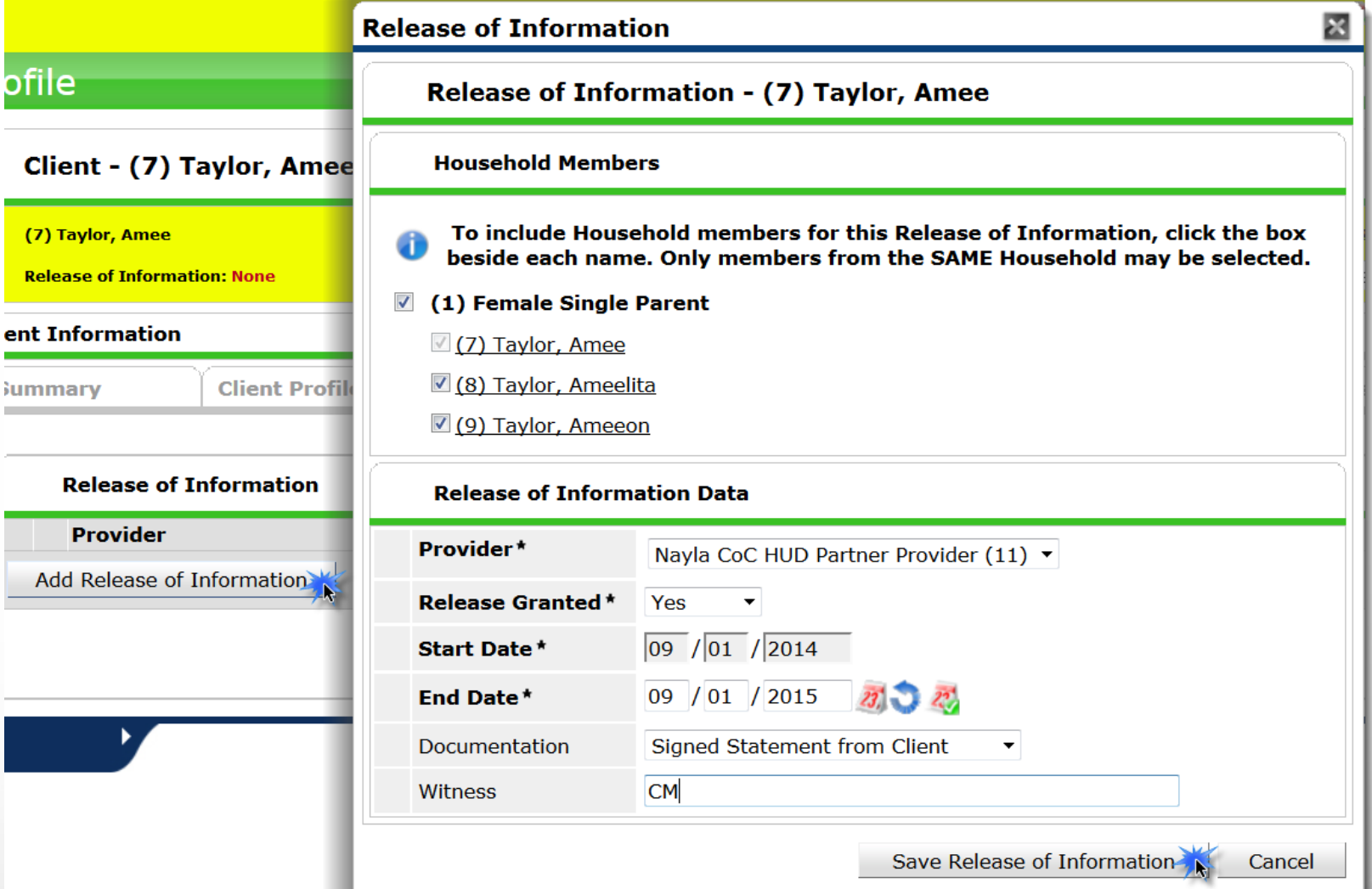



 ROI

- Ask your System Administrator II if the **ROI** is required in ServicePoint for your implementation!
- Go to the ROI Tab while in the Client Record
- Click Add Release of Information
- Check Household Members (if it applies)
- Complete appropriate information
- Click Save Release of Information

*Note: If **ROI** is turned on in ServicePoint, Release Granted must be answered "Yes" in order to make assessment information visible*

Release of Information (ROI) may trigger data sharing and visibility settings.



Release of Information

Release of Information - (7) Taylor, Ameer

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.




(1) Female Single Parent


(7) Taylor, Ameer

(8) Taylor, Ameerlita

(9) Taylor, Ameeron

Release of Information Data

Provider *	Nayla CoC HUD Partner Provider (11) ▾
Release Granted *	Yes ▾
Start Date *	09 / 01 / 2014
End Date *	09 / 01 / 2015   
Documentation	Signed Statement from Client ▾
Witness	CM

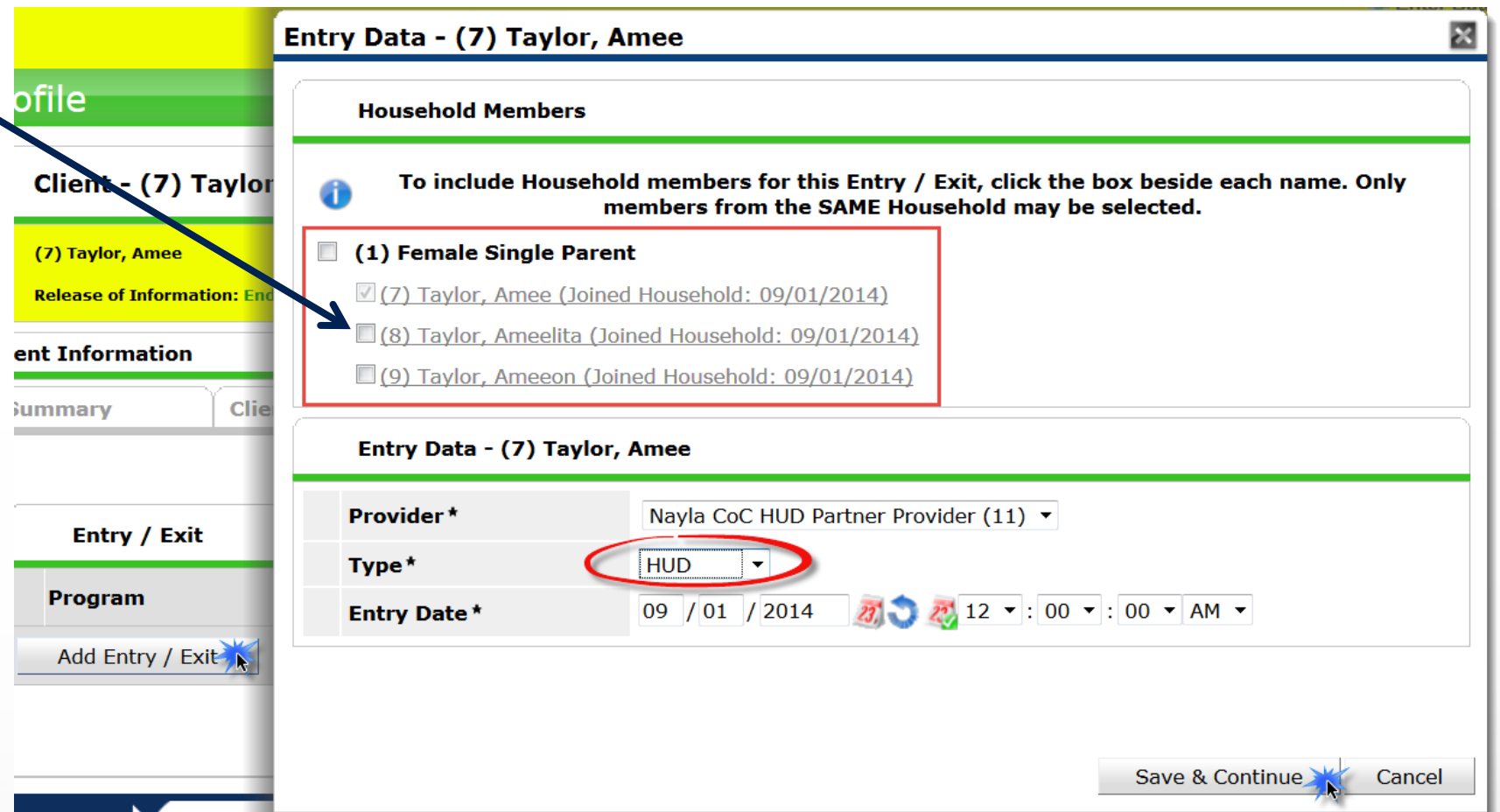
Save Release of Information  Cancel





Enter a client into a project.
Entry = Enrollment

- Click Add Entry/Exit
- Select all household members that will be entered into the program as appropriate
- Provider is defaulted to the provider you're signed in as or provider that you're Entering Data As (EDA)
- Select appropriate Entry Type (i.e. HUD, VA, PATH, etc.)
- Entry date and time is defaulted to the current system date or the date and time you're backdating to
- Click Save & Continue



Entry Data - (7) Taylor, Ameer

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- (1) Female Single Parent
 - (7) Taylor, Ameer (Joined Household: 09/01/2014)
 - (8) Taylor, Ameerita (Joined Household: 09/01/2014)
 - (9) Taylor, Ameeron (Joined Household: 09/01/2014)

Entry Data - (7) Taylor, Ameer

Provider * Nayla CoC HUD Partner Provider (11) ▾

Type * HUD ▾

Entry Date * 09 / 01 / 2014 12 : 00 : 00 AM

Save & Continue Cancel





- Answer all questions on the **Entry Assessment**. These fields are important for reporting status at Entry.
- Follow the screen from top to bottom
- Click Save then click on each household member on the left-hand side of the Entry/Exit Data Pop-up to complete their Entry Assessments
- Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved.
- Click Save & Exit if completed

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* Nayla CoC HUD Partner Provider (11)

Type* HUD

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
<input checked="" type="checkbox"/>	(7) Taylor, Ameer	No	09/01/2014						
<input checked="" type="checkbox"/>	(8) Taylor, Ameelita	No	09/01/2014						
<input checked="" type="checkbox"/>	(9) Taylor, Ameenon	No	09/01/2014						

Showing 1-3 of 3

Entry Assessment

Household Members

- (7) Taylor, Ameer
Age: 35
- (8) Taylor, Ameelita
Age: Unknown
- (9) Taylor, Ameenon
Age: Unknown

HUD CoC and ESG Entry Entry Date: 09/01/2014 12:00:00 AM

Date of Birth: 08 / 01 / 1979

Date of Birth Type: Full DOB Reported (HUD)

Primary Race: Asian (HUD)

Secondary Race: -Select-



Ethnicity: Non-Hispanic/Non-Latino (HUD)

Note: For HUD Verification within E/E Assessment, see next slide



Entry Exit

- If HUD Funded, HUD *requires* that YES and NON-YES Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities be verified during Entry, Updates (Interims), Annual Assessments, Exits and Follow-Up:
 - These can be updated individually by clicking “ADD” and manually entering the information for each sub-assessment and fields within those sub-assessments OR
 - You can *quickly* do this by clicking the **HUD Verification** link (see how to on next slide)

Disabilities		HUD Verification 	
Disability Type	Disability determination	Start Date *	End Date
Add 			





- Click the **HUD Verification** link
- The HUD Verification pop-up will display
- You can quickly select all the “No” answers by clicking the Radio button at the top of the pop-screen
- If a “Yes” is selected, you will have another pop-up display to complete pertinent information about that benefit or income
- Once completed, click **Save & Exit**
- A Green check mark will appear once benefits are all verified next to the HUD Verification link

HUD Verification: Disabilities for 10/21/2014

Per Disability Type, the current records for Disabilities as of 10/21/2014 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 10/21/2014, 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 checked="" 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"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

Add Recordset

Disabilities

Disability Type: Alcohol Abuse (HUD)

Disability determination: Yes (HUD)

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently: -Select-

If Yes, Documentation of the disability and severity on file: -Select-

If Yes for Mental Health Problem, Alcohol Abuse, Drug Abuse, or Both Alcohol and Drug Abuse, How confirmed (PATH only): -Select-

If Yes for Mental Health Problem (PATH only) Serious mental illness (SMI) and, if SMI, how confirmed: -Select-

(If yes) Currently receiving services or treatment?: -Select-

Start Date*: 10 / 21 / 2014

Note on Disability:

Above condition is going to be long term?: -Select-

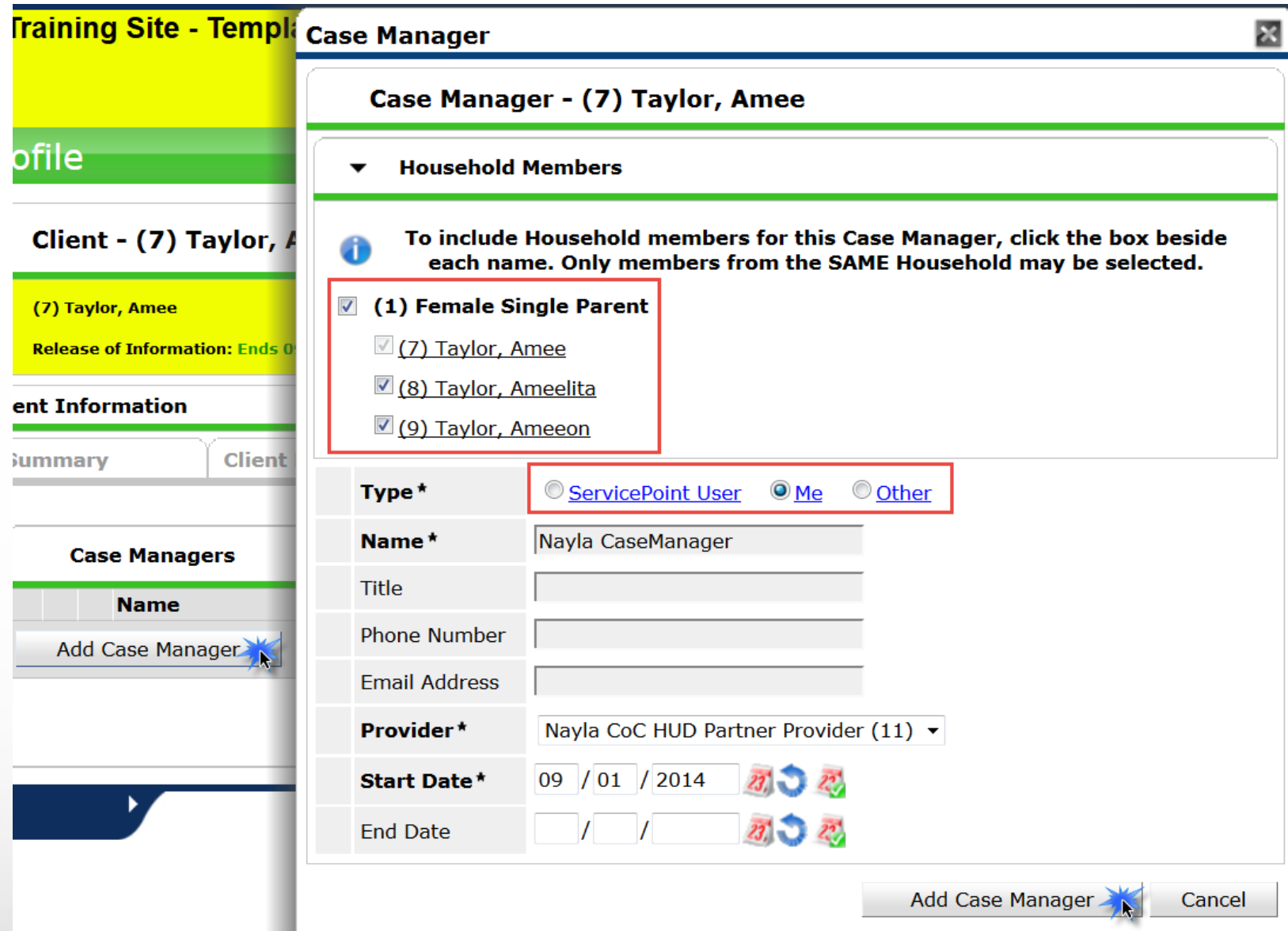
End Date: / /

Save Cancel



Case Manager

- Click the Case Manager Tab within Client Information
- Click Add Case Manager
- Select household members
- Select the Case Manager:
 - **ServicePoint User-** allows to pick from a dropdown of users for that provider
 - **Me-** will default you (user entering the information)
 - **Other-** will allow manually entered Case Manager information
- Provider will be defaulted to user default provider or provider user is Entering Data As (EDA)
- Click Add Case Manager



Case Manager

Case Manager - (7) Taylor, Amee

Household Members

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

- (1) Female Single Parent
 - (7) Taylor, Amee
 - (8) Taylor, Amealita
 - (9) Taylor, Ameen

Type * ServicePoint User Me Other

Name * Nayla CaseManager

Provider * Nayla CoC HUD Partner Provider (11)

Start Date * 09 / 01 / 2014

End Date / /

Add Case Manager Cancel

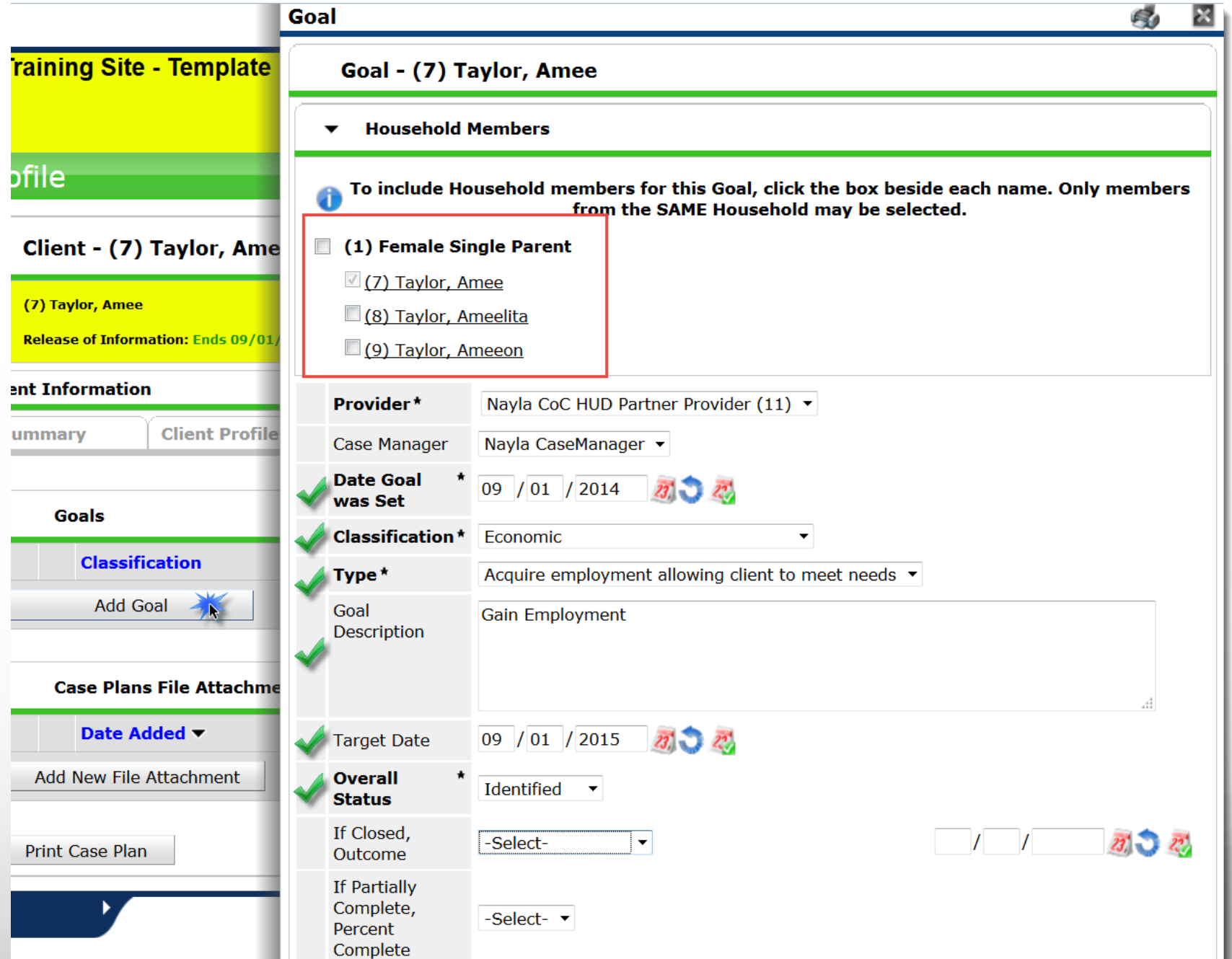


Case Plans

The questions in bold are required to be answered in order to save the goal.

- Click the Case Plans Tab within Client Information
- Click Add Goal
- Select household members that the Goal applies to
- **Date Goal was Set** is defaulted to the current System date or Back Date
- Select Classification
- Select Type
- Enter Goal Description
- Select Target Date
- Select Overall Status

Create **Goals**, **Action Steps** and **Case Notes** to assist clients in planning self sufficiency and track outcomes!!



Goal - (7) Taylor, Ameer

Household Members

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

- (1) Female Single Parent
 - (7) Taylor, Ameer
 - (8) Taylor, Ameerlita
 - (9) Taylor, Ameeron

Provider * Nayla CoC HUD Partner Provider (11)

Case Manager Nayla CaseManager

Date Goal was Set * 09 / 01 / 2014

Classification * Economic

Type * Acquire employment allowing client to meet needs

Goal Description Gain Employment

Target Date 09 / 01 / 2015







Overall Status * Identified

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Case Plans (continued)

- If necessary, create a follow-up. This will create a reminder within the Home Page Dashboard within the Follow-Up Dashlet.
- Assign the date the follow-up should be done by and the user who should follow up, if necessary.
- Once the follow-up has been made at a later date, the following fields can be answered: Follow Up Made, Completed Follow Up Date, and the Outcome is filled out.

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	Nayla CoC HUD Partner Provider (11) ▾ -Select- ▾
Follow Up Made	-Select- ▾
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Outcome at Follow Up	-Select- ▾



Case Plans (continued)

- Add Case Notes
- Complete Case Notes
- Click Save Case Note when finished

Case Notes

Provider	Case Manager	User Creating
Add Case Note		No mat

Action Steps Planned

Action Step	Target
Add Action Step	No matches.

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
Add Service	Add Multiple Services	No matches.		

Print
Save Goal
Save & Exit
Exit

Case Notes

Case Note - (7) Taylor, Amee

▼ Household Members

No Household Members were originally associated.

Provider *	Nayla CoC HUD Partner Provider (11) ▼
Case Manager	Nayla CaseManager ▼
Note Date *	09 / 01 / 2014
Note *	Initial Case Management Session to discuss goals with client.

Save Case Note Cancel



Case Plans (continued)

- Add Action Plan
- Complete Action Step Field. This is a free text area so user can be specific.
- Click Save Action Step when finished

Case Notes

Provider	Case Manager	User Creating
No matches		

Add Case Note

Action Steps Planned

Action Step	Target Date
No matches	

Add Action Step

Service Items for this Goal

Date Set	Created By	Need Type
No matches		

Add Service Add Multiple Services

Action Step - (7) Taylor, Amee

Household Members

No Household Members were originally associated.

Provider * Nayla CoC HUD Partner Provider (11) ▼

Date Action Step was set * 09 / 01 / 2014

Action Step * Contact Career Center for Resume Building Class

Target Date 09 / 05 / 2014

Overall Status * Identified ▼

If Closed, Outcome -Select- / /

Projected Follow Up Date / /

Follow Up User Nayla CoC HUD Partner Provider (11) ▼

Follow Up Made -Select-

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Save Action Step
Cancel

Print
Save Goal
Save & Exit
Exit



Case Plans
(continued)

We will skip Add Services within the screen. See Service Transactions for details on how to add services

- Click Print to print the Case Plan for your Client
 - Select desired options. Then click Print
- Click Save Goal or
- Click Save & Exit when finished

Goal Print Options

Include Case Notes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Print Case Notes	<input checked="" type="radio"/> All <input type="radio"/> Date Range
Case Note Providers	<input checked="" type="radio"/> All <input type="radio"/> My Provider Only
Include Action Steps	<input checked="" type="checkbox"/>
Include Service Items	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>

Print Cancel

Case Notes

	Provider	Case Manag
	Nayla CoC HUD Partner Provider	Nayla CaseManager

Add Case Note

Showing 1-1 of 1

Action Steps Planned

	Action Step	Target Date	Status	Outcome
	Contact Career Center for Resume Building Class	09/05/2014	Identified	

Add Action Step

Showing 1-1 of 1

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service Add Multiple Services

Print Save Goal Save & Exit Exit

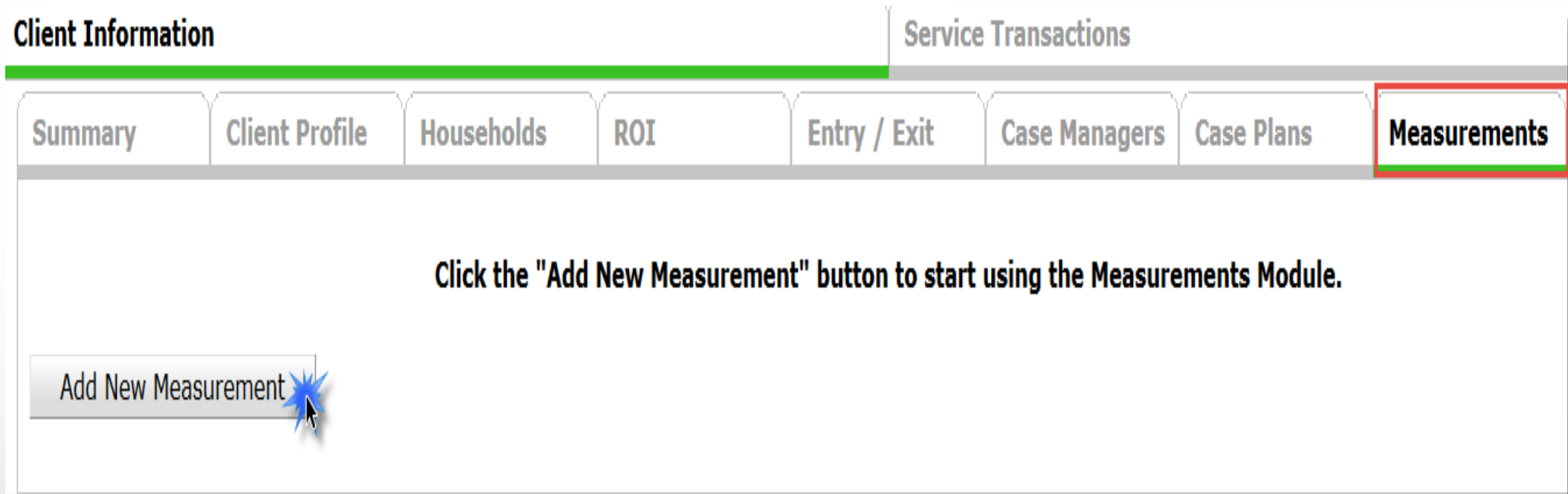
Add Attachments!



Measurements (Optional Tools)

There are 3 different measurements possible depending on the provider set-up: Self Sufficiency Matrix, SPDAT, and F-SPDAT. This guide only covers the Self -ufficiency Matrix.

- Click the Measurements Tab within Client Information
- Click Add New Measurement



Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | **Measurements**

Click the "Add New Measurement" button to start using the Measurements Module.

Add New Measurement




Measurements
(Optional Tools)

- Provider- Defaults to user provider or EDA Provider
- Measurement Tool- Tools the provider is using will be available from the dropdown.
- Point of Measurement— must have an initial measurement first.
- Information Reported To-
 - *ServicePoint User*
 - *Other (if other, type name)*
- Click Continue, then the screen will expand

Measurement Pop-up
Note: Bold Questions need to be answered in order to continue

Measurement

Add New Measurement - (7) Taylor, Amee

Provider *	Nayla CoC HUD Partner Provider (11) ▾
Measurement Tool *	Self-Sufficiency Matrix ▾
Point of Measurement	Initial
Date *	09 / 01 / 2014 
Information Reported To	<input checked="" type="radio"/> ServicePoint User <input type="radio"/> Other
Select User	Nayla Lead CoC Provider (10) ▾ Nayla CaseManager (16) ▾

Continue Exit



Measurements
(Optional Tools)

- Complete Measurement Tool per your Provider's standards.
- Click on the magnifying glass to view what the number represents in that particular domain.
- When completed, click Save & Exit

Measurement

Add New Measurement - (7) Taylor, Amee

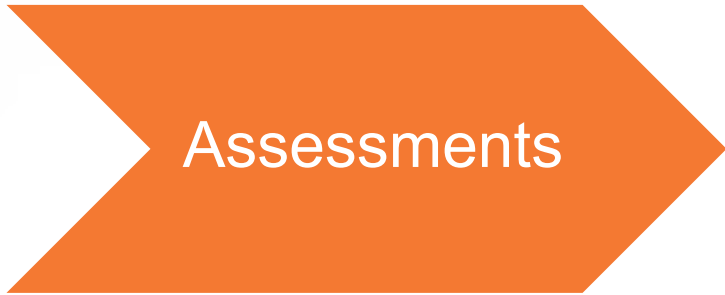
Provider	Nayla CoC HUD Partner Provider (11)
Measurement Tool	Self-Sufficiency Matrix
Point of Measurement	Initial
Date *	09 / 01 / 2014
Information Reported To	<input checked="" type="radio"/> ServicePoint User <input type="radio"/> Other
Select User	Nayla Lead CoC Provider (10) Nayla CaseManager (16)

Domains

Shelter/Housing	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	Currently Homeless and living in shelter
Employment	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Income	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Food and Nutrition	<input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Child Care	<input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Children's Education	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input checked="" type="radio"/> 5 <input type="radio"/> N/A	
Adult Education	<input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Health Care Coverage	<input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Life Skills	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input checked="" type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Family Relations	<input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Mobility	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Community Involvement	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Parenting Skills	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input checked="" type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> N/A	
Legal	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Mental Health	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Substance Abuse	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Safety	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input checked="" type="radio"/> N/A	
Total	29/55	
Average	2.64	

Save & Exit Exit





- If part of your agency’s workflow, click the Assessments Tab
- Select an assessment from the list, then click Submit
- Enter the data elements required by your provider
- Click Save

Client Information | **Service Transactions**

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | **Assessments**

Select an Assessment

VI-SPDAT

VI-SPDAT 📎 🔒

Start Date *	GENERAL INFORMATION	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONING	D. WELLNESS	PRE-SCREEN TOTAL
<input type="button" value="Add"/>						












“Service Transactions Tab”

Client Information **Service Transactions**

Service Transaction Dashboard

 Add Need	 Add Service	 Add Multiple Services	 Add Referrals	 View Previous Service Transactions
 View Shelter Stays	 View Entire Service History	<p>Use the Dashboard to quickly add Needs, Services or Referrals or to view the client’s historical records.</p>		





Things you should know...

- A need must be created in order for the End User to add services or referrals to the Client record.
- Bowman Systems uses 211 LA/AIRS Taxonomy, an indexing system of Health and Social Services
- Taxonomy Term = Service Term = Services rendered by a provider
- Needs will always be the same as the Service Term

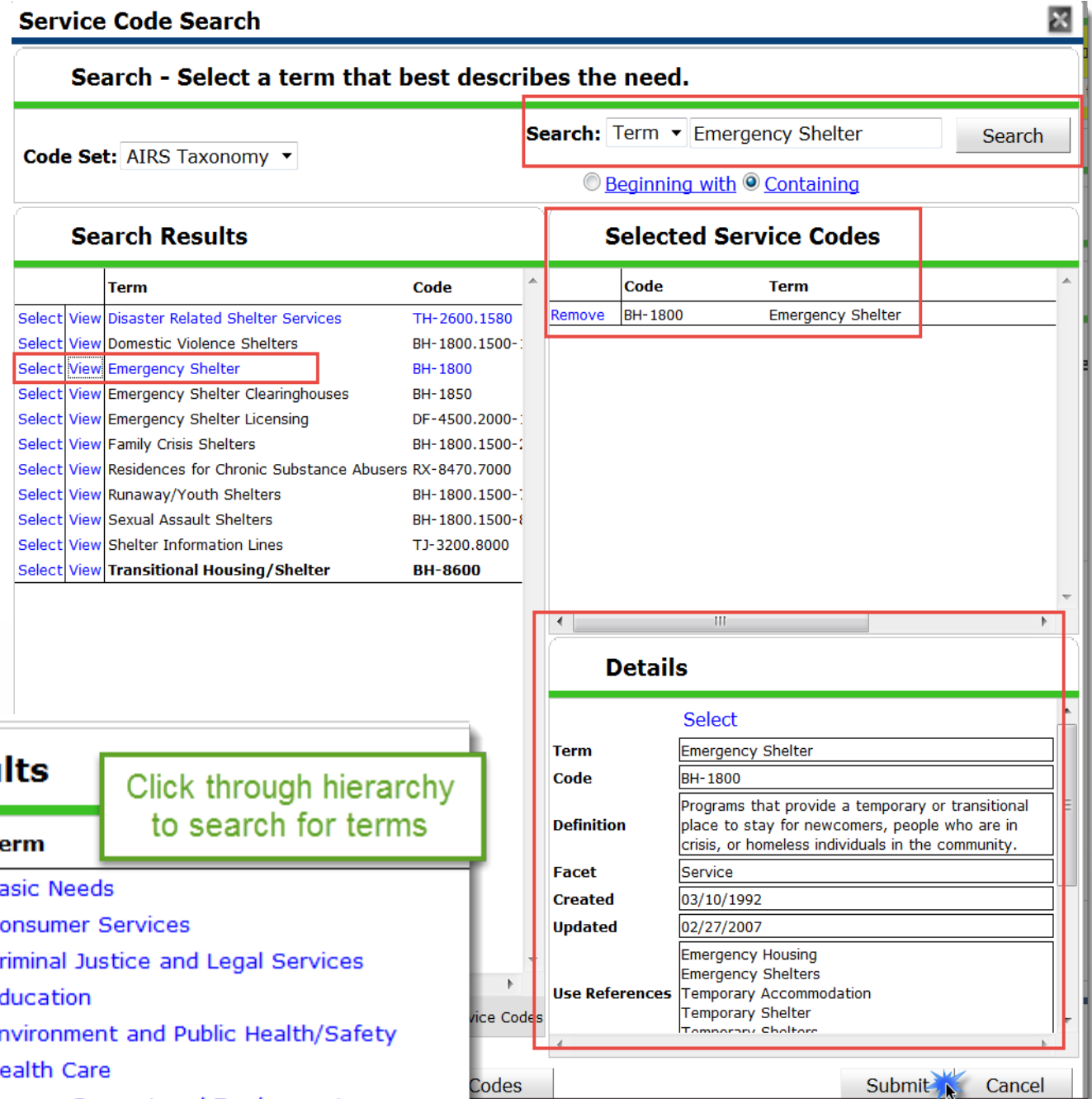
Example :

- Client's Need = Emergency Shelter,
- Service Provided = Emergency Shelter
- If a referral, this would also equal = Emergency Shelter because it is a Service that the receiving agency provides



Service Transactions/
AIRS
Taxonomy

- Each Provider should have a **Quick List** created of the most common needs/ services requested by their clients.
- When a Quick List is not created, users have to “Look-up” service Terms within ServicePoint’s pop-up AIRS taxonomy
- Service Terms can be searched within the Search box or by searching within the hierarchy
- Click Select to the left of the taxonomy term
- Click View to view the description of the Service term under details



Service Code Search

Search - Select a term that best describes the need.

Code Set: AIRS Taxonomy

Search: Term Emergency Shelter Search

Beginning with Containing

Search Results		Selected Service Codes	
	Term	Code	
Select View	Disaster Related Shelter Services	TH-2600.1580	
Select View	Domestic Violence Shelters	BH-1800.1500-	
Select View	Emergency Shelter	BH-1800	Remove BH-1800 Emergency Shelter
Select View	Emergency Shelter Clearinghouses	BH-1850	
Select View	Emergency Shelter Licensing	DF-4500.2000-	
Select View	Family Crisis Shelters	BH-1800.1500-	
Select View	Residences for Chronic Substance Abusers	RX-8470.7000	
Select View	Runaway/Youth Shelters	BH-1800.1500-	
Select View	Sexual Assault Shelters	BH-1800.1500-	
Select View	Shelter Information Lines	TJ-3200.8000	
Select View	Transitional Housing/Shelter	BH-8600	

Details

Select

Term: Emergency Shelter

Code: BH-1800

Definition: Programs that provide a temporary or transitional place to stay for newcomers, people who are in crisis, or homeless individuals in the community.

Facet: Service

Created: 03/10/1992

Updated: 02/27/2007

Use References: Emergency Housing, Emergency Shelters, Temporary Accommodation, Temporary Shelter, Temporary Shelters

Submit Cancel



Search Results

	Code	Term
Select View	B	Basic Needs
Select View	D	Consumer Services
Select View	F	Criminal Justice and Legal Services
Select View	H	Education
Select View	J	Environment and Public Health/Safety
Select View	L	Health Care
Select View	N	Income Support and Employment
Select View	P	Individual and Family Life
Select View	R	Mental Health and Substance Abuse Services
Select View	T	Organizational/Community/International Services

Click through hierarchy to search for terms













➤ If no services or referrals are to be provided and only need(s) are to be recorded, click Add Need

Client Information | **Service Transactions**

Service Transaction Dashboard

 Add Need 	 Add Service	 Add Multiple Services	 Add Referrals	 View Previous Service Transactions
 View Shelter Stays	 View Entire Service History			



- Select to which household members as necessary
- Select the Need from the quick list or use the Look Up to find a term that best describes the need.
- Click Save & Continue

Client Information

Service Transactions

Add Need

Household Members

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

(1) Female Single Parent
 (7) Taylor, Amee
 (8) Taylor, Amealita
 (9) Taylor, Ameen

Need Information

Provider * Nayla CoC HUD Partner Provider (11) Look Up

Need * Transitional Housing/Shelter (BH-8600)

Date of Need * 09 / 01 / 2014 12 : 00 : 00 AM

Amount if Financial

Notes

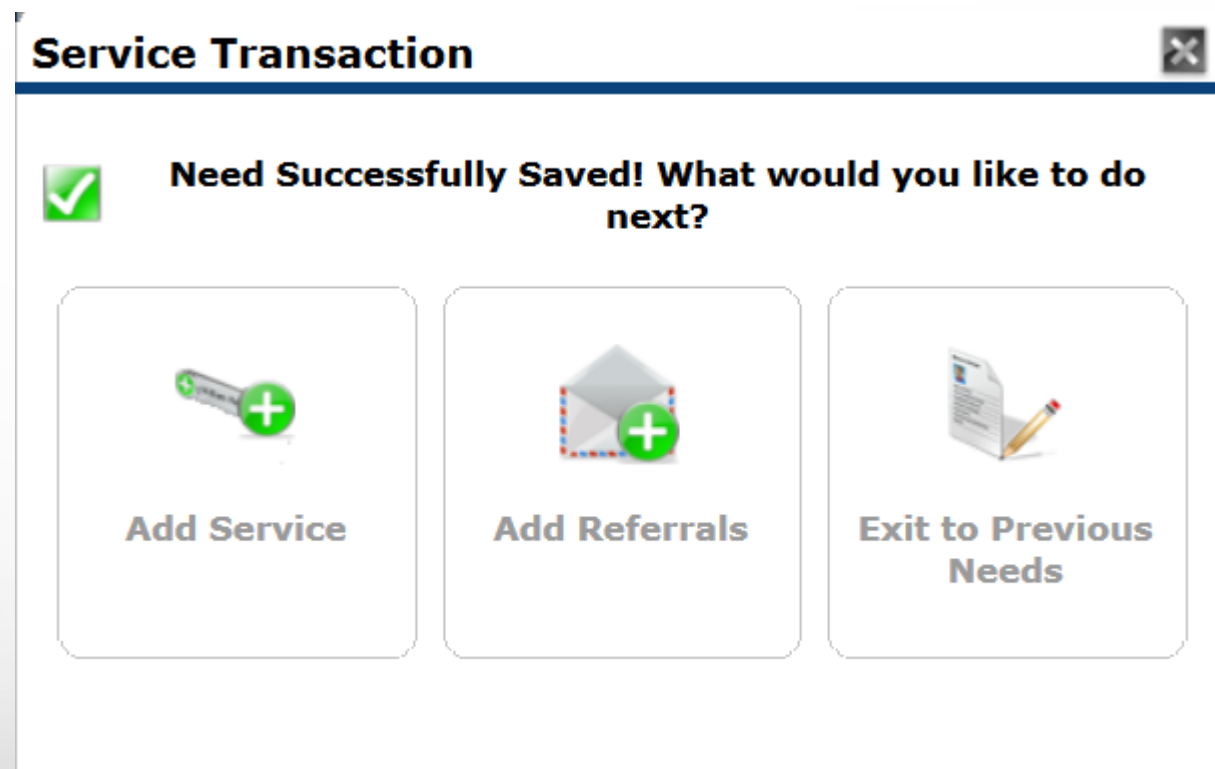
Need Status * Identified

Outcome of Need Service Pending

If Need is Not Met, Reason -Select-

Service Transaction Action Workflow

- An action window will appear to assist the user with the next data entry step in the process.
- A user could add a Service or Referral (Service and Referral workflows to follow)
- If there is only the need at this time, Click “Exit to Previous Needs” to go to the entire need history (see next slide).



Service Transaction Action Workflow

- A user can add more Needs, Services or Referrals from this window by clicking the appropriate tab.
- To get back to the Dashboard, click on the “Back to Dashboard” button at the bottom of the screen at this time

Client Information
Service Transactions

Needs
Services
Referrals
Shelter Stays
Entire Service History

Previous Needs

Select Dates

-Select- ▼

Start Date

/ /

End Date

/ /

Search

				Provider Creating	Need Type	Need Status	Amount of Need
				Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
				Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
				Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress	
				Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
				Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	

Add Need
Showing 1-5 of 5

Back to Dashboard
Exit












➤ Click Add Service

Client Information | Service Transactions

Service Transaction Dashboard

 Add Need	 Add Service	 Add Multiple Services	 Add Referrals	 View Previous Service Transactions
 View Shelter Stays	 View Entire Service History			





Adding initial Service

- Select Household Members as appropriate (check household type to include all family members at once)
- Date and time will default to either Current System date or Back Date
- Select Service Type from the Service Quick List drop down
- Or Look Up Service Code
- Click Save & Continue

Client Information
Service Transactions

Add Service

Household Members

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

(1) Female Single Parent

(7) Taylor, Amee (Primary Client)

(8) Taylor, Amealita

(9) Taylor, Ameen

Service Provider* Nayla CoC HUD Partner Provider (11) ▾

Creating User Nayla McCarty

Start Date* 09 / 01 / 2014 12 : 00 : 00 AM ▾

End Date 09 / 01 / 2014 12 : 00 : 00 AM ▾

Service Type* Case/Care Management (PH-1000) ▾ Look Up

Provider Specific Service -Select- ▾

Save & Continue
Cancel





Add Service

Areas on the Service Screen

Once the service is saved, different areas on the service screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

- Add Service Notes as necessary
- If protocol at your organization, add Service Costs.
- Continue to scroll down

Service Notes	Initial intake for services
----------------------	-----------------------------

Service Costs	
Number of Units	<input type="text"/>
Unit Type	-Select- ▼
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>





Continued Areas on the Service Screen

- If protocol at your organization, add Funding Source
- Add Support Documentation as appropriate
- Continue to scroll down

The screenshot shows the 'Add Service' interface with several key sections and overlays:

- Service Costs:** Fields for Number of Units, Unit Type, Cost per Unit, and Total Cost of Units.
- Apply Funds for Service:** A section containing a 'Funding Sources' table with one entry 'CAP' and an 'Add Funding Source' button.
- Support Documentation:** A table with columns 'Date Added' and 'Name', containing one entry '09/18/2014 Service Worksheet.docx' and an 'Add Support Documentation' button.
- Pop-up: Add Funding Source:** A window with a 'Fund Search' section and a 'Fund Search Results' table.

Fund	Category
CAP	N/A
FEMA	N/A
HPRP Source 1	N/A
HPRP Source 2	N/A
HPRP Source 3	N/A
HUD Shelter+Care	N/A
HUD Supportive Housing Program	N/A
Internal Budget	N/A
Not Recorded	N/A
Shelter+Care	N/A
- Pop-up: Upload Support Documentation:** A window with fields for 'Name *' (with a 'Browse...' button) and 'Description', and 'Upload' and 'Cancel' buttons.





Add Service

Continued Areas on the Service Screen

- Add Follow-Up information as necessary
- Need Information for this service will be **AUTOMATICALLY** identified. Use the dropdown menu next to Need Status to select the appropriate status.
- Select Outcome of need if appropriate
- Select Reason if not met as appropriate, then click Save & Exit



Follow Up Information

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Follow Up User	Nayla CoC HUD Partner Provider (11) <input type="text"/>	<input type="text" value="-Select-"/>
Follow Up Made	<input type="text" value="-Select-"/>	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  

Need Information

Need Status*	Identified <input type="text"/>
Outcome of Need	<input type="text" value="-Select-"/>
If Need is Not Met, Reason	<input type="text" value="-Select-"/>

Save Save & Exit  Exit


 Add Referral

▼ Add Needs

▼ Household Members

i To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected.

(1) Female Single Parent

(7) Taylor, Amee

(8) Taylor, Amealita

(9) Taylor, Ameenon


Needs Assignment

i Select up to 5 Needs

Service Code Quicklist

Case/Care Management (PH-1000)

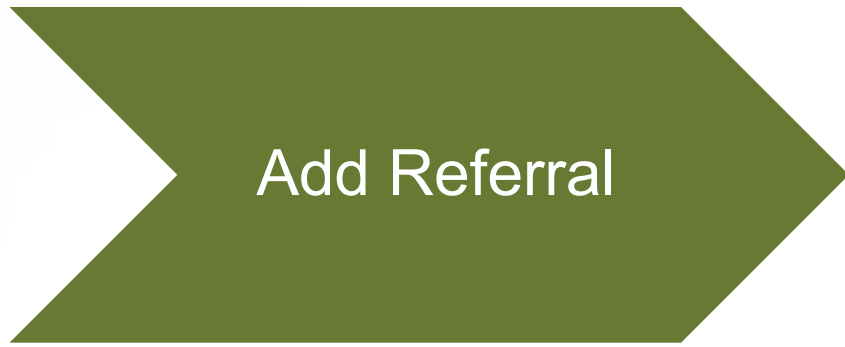
Transitional Housing/Shelter (BH-8600)

Add Terms 

Add Terms & Go To Search Results

- Return to Service Transactions Dashboard, then click Add Referral
- Select household members as appropriate
- From the Service Code Quick List by highlighting the term then click Add Terms then scroll down, or click Add Terms & Go To Search Results
- OR click Service Code Look-Up





- If setup within your provider, you may have a list of Referral Providers. Click the Provider dropdown arrow to select a provider from the Referral Provider Quicklist
- Users have the option of narrowing based on geography. Use as necessary.

Referral Provider Quicklist

Provider -Select- Add Provider Bed Availability

Search for Providers

i These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider Search by adding Target Populations to the Selected Service Terms or by modifying the Service Terms used for the Provider Search.

Refine Search with Service Terms or Target Populations

Refine Provider Search Criteria

Search for Providers by using keywords for their Provider Name, AKA, or Description.

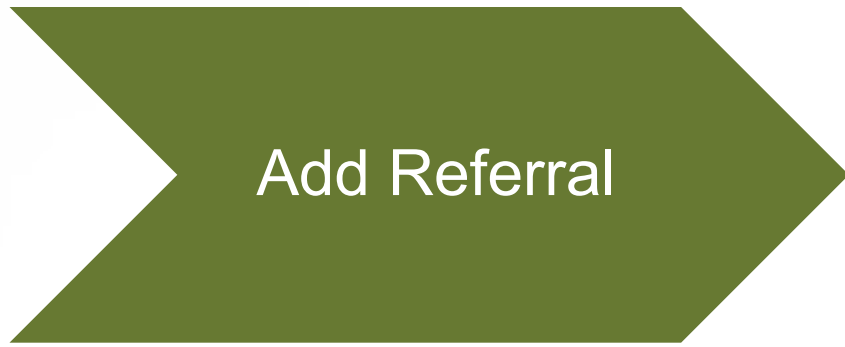
Search Search Hide Advanced Search Options

Search for Provider based on their Physical Location or the Area Served.

<input type="text" value="City"/>	<input type="text" value="State"/>
<input type="text" value="County / Parish"/>	<input type="text" value="ZIP Code"/>
<input type="checkbox"/> ServicePoint Users ONLY	<input style="border: 1px solid #ccc; padding: 2px; width: 100px;" type="text" value="Type"/> -Select-

Search Clear All



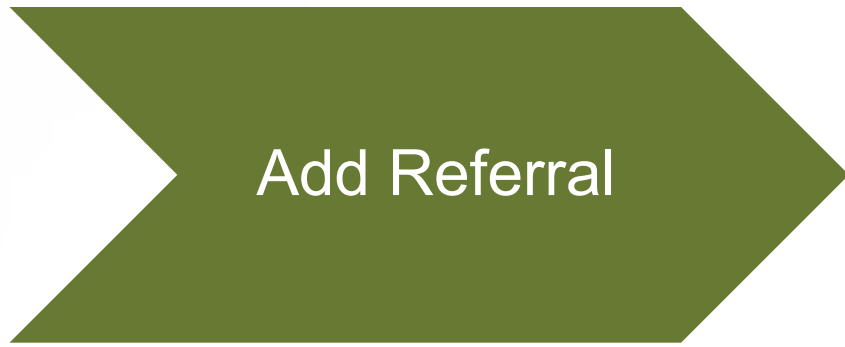


- Adding Needs at the beginning of the search, will automatically trigger a search for providers.
- Click the name of the provider to view this provider’s service information, a new pop-up will appear.
- Matched needs show whether that provider provides the service based on the Need selected
- Click the green circle to select this provider for referral

Search Results																											
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider											Type	Phone	Location	Distance	Matched Needs											
		Nayla CoC HUD Partner Provider										Level 2	Unknown	Unknown	N/A	1/1											
		Provider B										Level 3	318-213-8780	Shreveport, LA 71101	N/A	1/1											

Bed Availability Showing 1-2 of 2





- Referral Provider will appear within Selected Providers once selected
- If the Referral Provider uses ServicePoint, a notification can be sent. Click the box to the left of “Check to notify ServicePoint Providers by Email”

Selected Providers

	Provider ▲	Type	Phone	Location	Last Updated
	Provider B	Level 3	318-213-8780	Shreveport, LA 71101	04/03/2012

Showing 1-1 of 1

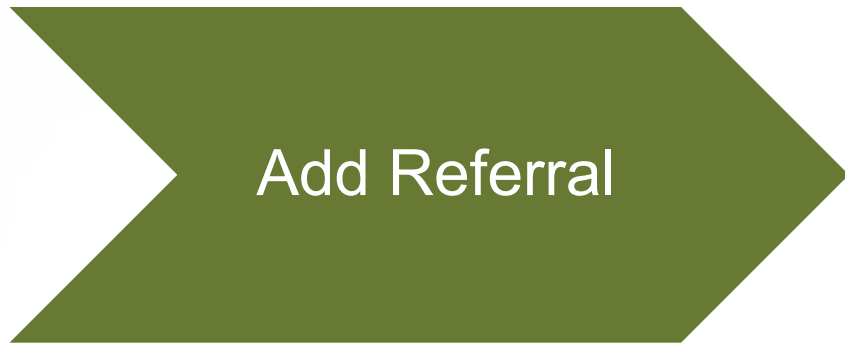
▼ **Refer to Providers**

Referral Data

Needs Referral Date *	09 / 01 / 2014 12 : 00 : 00 AM
Referral Ranking	-Select-
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Follow Up User	Nayla CoC HUD Partner Provider (11) -Select-

[Check to notify ServicePoint Providers by Email.](#)

Connecting Communities > Demonstrating Outcomes™



- Enter Financial need if necessary
- Complete Need Status/Outcome as appropriate
- Click Save ALL! If you click Save Needs ONLY it will ONLY save the needs and NOT the referral.

Referrals
[Send Summary](#)

Referred-To Provider	Transitional Housing/Shelter	Referred Clients
Provider B (6)	<input checked="" type="checkbox"/>	(7) Taylor, Amee

▼ **Need Data**

Date of Need * 09 / 01 / 2014 🗓️ 🔄 📅 12 : 00 : 00 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Transitional Housing/Shelter (BH-8600)	<input type="text"/>	Identified -Select- -Select-	





➤ Review Historical Transactions!
 Navigate **Back to Dashboard**

Client Information
Service Transactions

Needs
Services
Referrals
Shelter Stays
Entire Service History

All Service Transactions

Select Dates
 -Select-

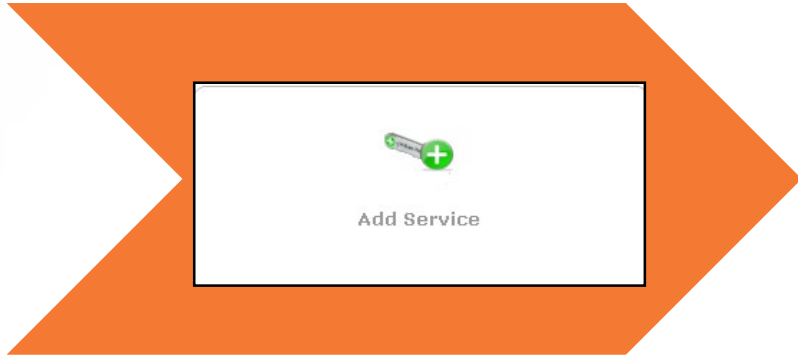
Start Date
 / /

End Date
 / /

Search

	Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
	Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
	Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
	Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
	Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
	Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met	
	Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
	Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
	Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
	Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
	Referral	09/01/2014	Provider B	Transitional Housing/Shelter		
	Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met	
	Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
	Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
	Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
	Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending	

Showing 1-8 of 8

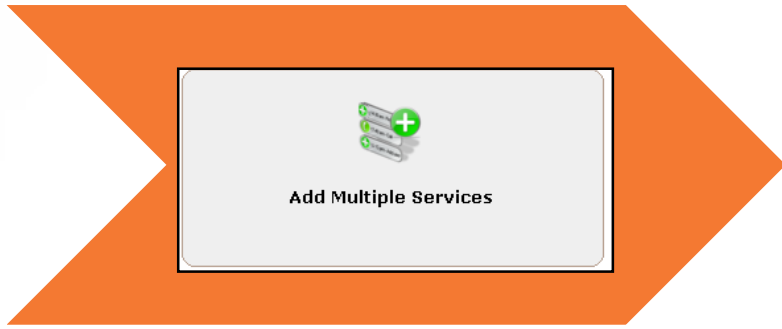


➤ Add services quickly by clicking the “Key” icon to the left of Needs within Entire Service History tab.

Client Information		Service Transactions						
Needs	Services	Referrals	Shelter Stays	Entire Service History				
All Service Transactions								
Select Dates		Start Date			End Date			
-Select-		/ /			/ /			
		Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal	
		Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified		
		Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management			
		Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified		
		Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter			
		Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met		
		Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter			
		Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified		
		Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management			
		Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified		
		Referral	09/01/2014	Provider B	Transitional Housing/Shelter			
		Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met		
		Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter			
		Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified		
		Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management			
		Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending		

Showing 1-8 of 8





- Click Add Multiple Services within the Service Transactions Dashboard
- Select multiple services at one time

To include Household members for these Services, click the box beside each name. Only members from the SAME Household may be selected.

(1) Female Single Parent

- (7) Taylor, Ameer
- (8) Taylor, Ameerita
- (9) Taylor, Ameeron

Multiple Services

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider * Nayla CoC HUD Partner Provider (11) ▾

Start Date * 09 / 01 / 2014 12 : 00 : 00 AM ▾

End Date 09 / 01 / 2014 12 : 00 : 00 AM ▾

Service List

Number of Services 1 **Need Status** Identified ▾ **Set All**

Number of Services * 1	
Service Type Case/Care Management (PH-1000)	
Need Information	
Need Status * Identified ▾	
	Remove Clear
Number of Services * 1	
Service Type Transitional Housing/Shelter (BH-8600)	
Need Information	
Need Status * Identified ▾	
	Remove Clear

Add Another **Remove All** **Clear All**

Save & Exit **Cancel**










Interim Reviews

- Interim Review in ServicePoint
 - It may be required that you update information throughout a client's participation in a program (HUD Programs, VA, Etc.)
 - Required Annual Assessments for clients participating in a program for more than 365 days (HUD Programs)
- To create Interim reviews:
 - Go to Client's record
 - Click the Entry/Exit tab
 - Click the "File" icon within Interims for that Entry

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

i Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit		Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
	Nayla CoC HUD Partner Provider (11)	HUD	 09/01/2014					

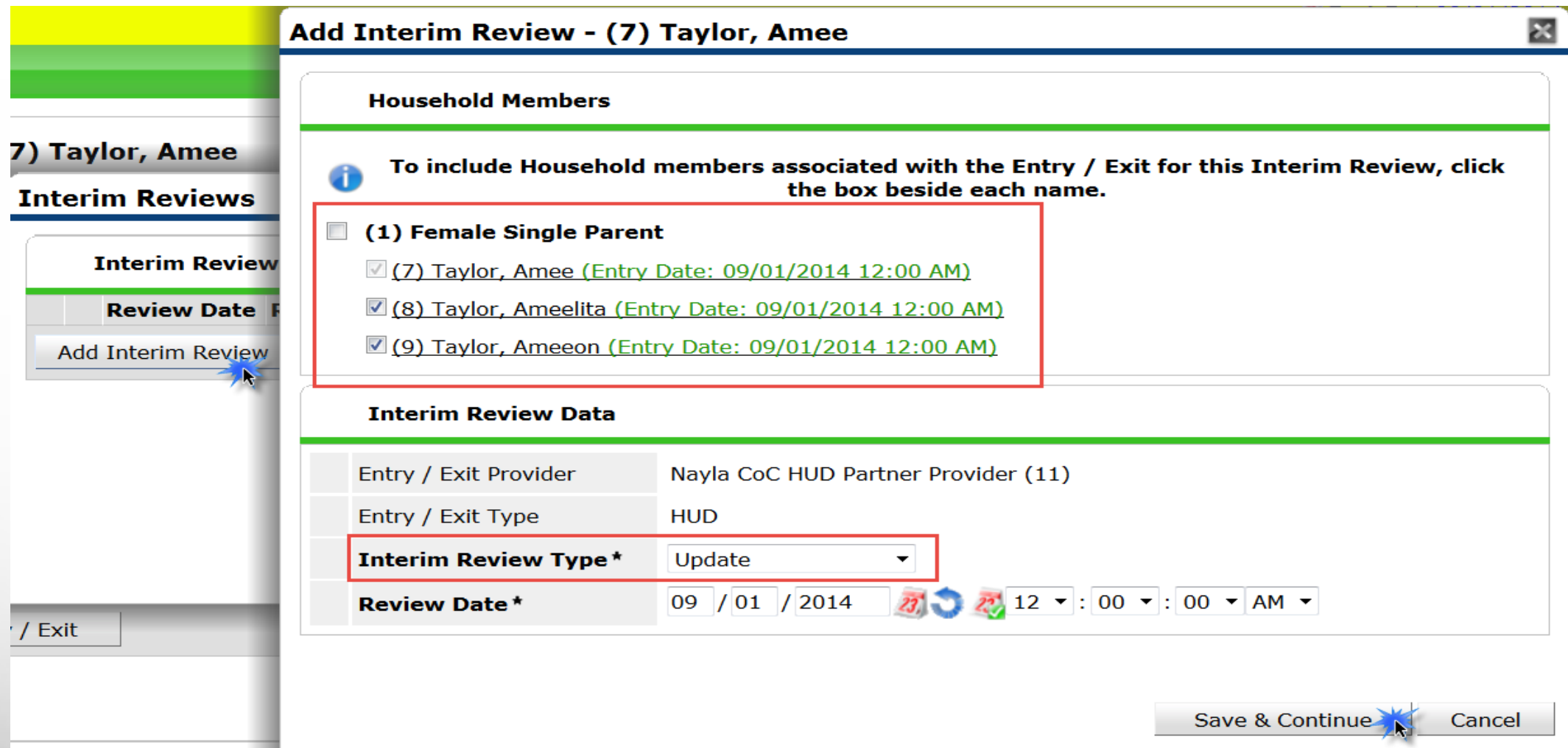
Add Entry / Exit | Showing 1-1 of 1

Exit



Interim Reviews

- Interim Reviews pop-up will display
- Click Add Interim Review
- All household members within the Entry will already be checked
- Select the Interim Review Type, then click Save & Continue. A new pop-up will display.



Add Interim Review - (7) Taylor, Ameer

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

- (1) Female Single Parent
 - (7) Taylor, Ameer (Entry Date: 09/01/2014 12:00 AM)
 - (8) Taylor, Ameelita (Entry Date: 09/01/2014 12:00 AM)
 - (9) Taylor, Ameeron (Entry Date: 09/01/2014 12:00 AM)

Interim Review Data

Entry / Exit Provider	Nayla CoC HUD Partner Provider (11)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	09 / 01 / 2014 12 : 00 : 00 AM

Buttons: Save & Continue, Cancel

Interim Reviews

- Complete Assessment as necessary
- If no changes need to be made, scroll down, then click Save. Click on each household member, then click save. Each will display a green check mark once saved.
- Click Save & Exit at this time! An Interim will be automatically recorded as soon as you Save! *For changes, see next slides.*

Household Members

- (7) Taylor, Amee
Age: 35
- (8) Taylor, Ameelita
Age: Unknown
- (9) Taylor, Ameen
Age: Unknown

HUD CoC and ESG Update

Interim Review Date: 09/01/2014 12:00:00 AM

Total Monthly Income G

Income from Any Source Yes (HUD) G

Monthly Income HUD Verification

Income from any source	Source of Income
US\$250.00	Alimony

Showing 1-1 of 1

Non-cash benefit from any source Yes (HUD) G

Non-Cash Benefits HUD Verification

Source of Non-Cash Benefit	Start Date *	End Date
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	09/01/2014	

Showing 1-1 of 1

Covered by Health Insurance Yes (HUD) G

Health Insurance HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
09/01/2014	MEDICAID	Yes	09/01/2015












Showing 1-1 of 1

Disabilities HUD Verification

Connecting Communities > Demonstrating Outcomes™

Interim Reviews

- **Special Note on Interim Reviews:** *Recommended Workflow for Updating Income, Non-Cash Benefits, Health Insurance and Disabilities with the HUD Verification*
 - If Sub-Assessment answers already exist, end date the ones that are no longer true
 - You can quickly view and edit all of the previous answers to the sub-assessments by clicking on the magnifying glass to the left of the benefit/income sub-assessment

		Disabilities			HUD Verification 
		Disability Type	Disability determination	Start Date *	End Date
		Mental Health Problem (HUD)	No (HUD)	10/21/2014	
		HIV/AIDS (HUD)	No (HUD)	10/21/2014	
		Physical (HUD)	No (HUD)	10/21/2014	
		Drug Abuse (HUD)	No (HUD)	10/21/2014	
		Developmental (HUD)	No (HUD)	10/21/2014	

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Interim Reviews

➤ **Special Note on Interim Reviews (continued):** *Updating Income, Non-Cash Benefits, Health Insurance and Disabilities with the HUD Verification*

- A new pop-up will display. At this time, you can sort through by filtering by Provider, Date Effective, etc. Simply click on the hyperlink to descent or ascend.
- To end the benefit/income, click the pencil to add the end date then click save (remembering to end date using the prior day)
- To add a new benefit/income, click the “Add” button

Show All Disabilities Records

Disabilities						
	Provider	Date Effective	Disability Type	Disability determination	Start Date	End Date
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Mental Health Problem (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	HIV/AIDS (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Physical (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Drug Abuse (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Developmental (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Both Alcohol and Drug Abuse (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Chronic Health Condition (HUD)	No (HUD)	10/21/2014	
	Nayla CoC HUD Partner Provider (11)	10/21/2014 3:50:48 PM	Alcohol Abuse (HUD)	Yes (HUD)	10/21/2014	

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Exit your Client

- Before creating an Exit for your client, ensure that all Service Transactions, Measurements and Case Plans are completed and Closed.
- End Case Manager relationship by adding an End Date
- Go to the Entry/Exit tab within the Client Record, then click the Pencil to the left of the Exit Date
- Select all household members to be Exited (in most cases all!)
- Complete all fields as necessary
- Click Save & Continue

Edit Exit Data - (7) Taylor, Amee

Household Members

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

(1) Female Single Parent
 (7) Taylor, Amee (Joined Household: 09/01/2014)
 (8) Taylor, Amealita (Joined Household: 09/01/2014)
 (9) Taylor, Ameen (Joined Household: 09/01/2014)

Edit Exit Data - (7) Taylor, Amee

<input checked="" type="checkbox"/>	Exit Date *	09 / 01 / 2014 12 : 00 : 00 AM
<input checked="" type="checkbox"/>	Reason for Leaving	-Select-
<input checked="" type="checkbox"/>	If "Other", Specify	<input type="text"/>
<input checked="" type="checkbox"/>	Destination *	-Select-
<input checked="" type="checkbox"/>	If "Other", Specify	<input type="text"/>
<input checked="" type="checkbox"/>	Notes	<input style="height: 40px;" type="text"/>



Exit your Client

- Complete Exit Assessment information for all clients in the household
- Green check marks will appear when each client is saved
- Click Save & Exit when finished

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* Nayla CoC HUD Partner Provider (11)

Type* HUD

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(7) Taylor, Amee	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	
	(8) Taylor, Amealita	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	
	(9) Taylor, Ameenon	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	

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Entry Assessment

Household Members

- (7) Taylor, Amee
Age: 35
- (8) Taylor, Amealita
Age: Unknown
- (9) Taylor, Ameenon
Age: Unknown

HUD CoC and ESG Exit Exit Date: 09/01/2014 12:00:00 AM

Total Monthly Income G

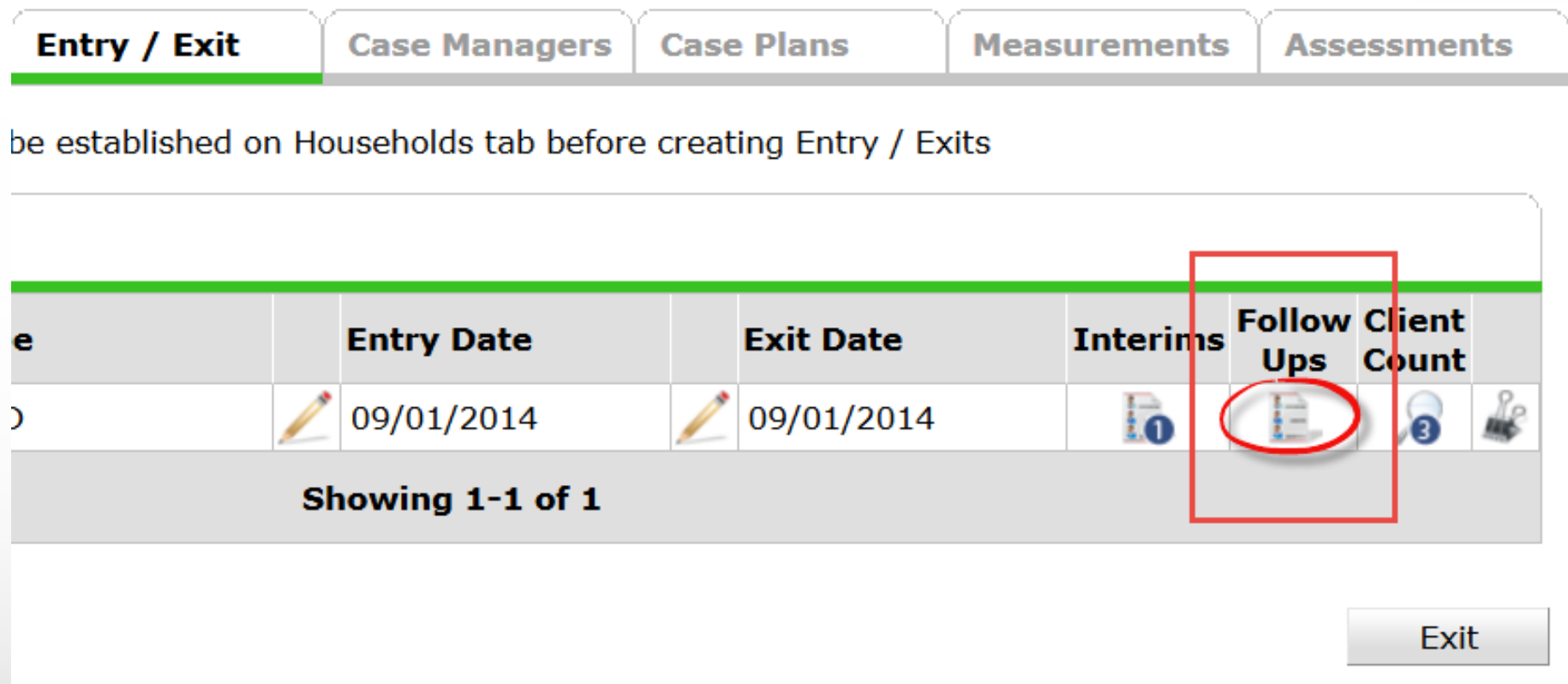
Income from Any Source Yes (HUD) G

Monthly Income **HUD Verification**








Follow-Up

- Follow-Up updates cannot be created until clients have been exited from the program
- To complete a follow-up, click the Entry/Exit Tab within the Client Record
- Click the “File” Icon within the Follow-Ups then follow the same steps as the Interim Reviews, except choose the appropriate Follow-Up Type



Entry / Exit Case Managers Case Plans Measurements Assessments

be established on Households tab before creating Entry / Exits

	Entry Date	Exit Date	Interims	Follow Ups	Client Count
	 09/01/2014	 09/01/2014			 3

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Exit

