



# HPRP

**HOMELESS PREVENTION AND RAPID RE-HOUSING**

**HMIS SERVICE POINT 5**

**FOR AGENCIES**

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**TO LOGON TO SERVICEPOINT:**

1. Establish your Internet connection and type the following web address to access the Logon site.

**http://hmisummit.servicept.com**

2. Type your ServicePoint User Name and Password, then click the Logon button.

3. Your main ServicePoint navigation screen will appear.

Date	Headline
02/26/2010	<a href="#">Remember to Lock Down AIDS/HIV &amp; Mental Health Questions!!!!</a>
08/29/2007	<a href="#">HMIS User Group Meeting</a>
09/11/2006	<a href="#">HMIS Website Calendar</a>
02/13/2006	<a href="#">2010 Federal Poverty Guidelines</a>
02/03/2006	<a href="#">Continuum of Care Website</a>
08/03/2005	<a href="#">Definition of Chronic Homelessness</a>
06/07/2004	<a href="#">ODJFS-Forms, Applications, and Publications</a>
06/07/2004	<a href="#">Guide to the HIPAA Privacy Rule</a>

Date	Headline

Client ID	Type	Date	Time Remaining



After receiving an email from InfoLine about a client who *may* be eligible for the HPRP program, you can look at the client information in ServicePoint. The client should call you within 48 hours to set up an appointment. At the appointment, you can further determine if the client is eligible for the HPRP program. After determining that they are eligible, you can begin entering their information in ServicePoint.

### TO RUN A REFERRAL REPORT:

After receiving an email from Info Line (Central Intake) you will have to run a referral report that shows the clients referred to you and what their needs are.

1. Click on the **Reports** tab on the Main Dashboard and then click on the **Outstanding Referrals** tab.

**Report Options**

**Provider \*** Homeless Prevention (Salvation Army) (92) 1

This provider AND its subordinates  This provider ONLY

**Referral Type \*** -Select-

Referral Date Range: [ ]/[ ]/[ ] [ ]/[ ]/[ ]

Build Report Clear

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**Outstanding Referrals**

Name	Group ID	Referral Date	Need Type	Referred By	Referred To
------	----------	---------------	-----------	-------------	-------------

2. Choose your HPRP provider from the **Provider** picklist (1).
3. The **Referral Type** should be *Cases referred to my provider*.
4. Type in a **date range**.
5. Click on the **Build Report** button.
6. Press **Ctrl P** to print your report.

## TO SEARCH FOR A CLIENT AFTER PRINTING THE REFERRAL REPORT:

1. Click on the **ClientPoint** button on the dashboard. The **Client Search** screen will display.

**Client Search**

Note: 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="checkbox"/>
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 ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

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**Client Number**

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

Client ID #

2. Type in the client's ID or their name and click on the **Submit** button.
3. The client's profile will display.

**Client - Squarepants, Sponge Bob (17833)**

Squarepants, Sponge Bob (17833)  
Release of Information: None

Client Information Service Transactions

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

**Client Record**

Name	Sponge Bob Squarepants
Alias	
Social Security	444-55-6666
SSN Data Quality	Full SSN Reported (HUD)
Age	55

**Client Demographics**

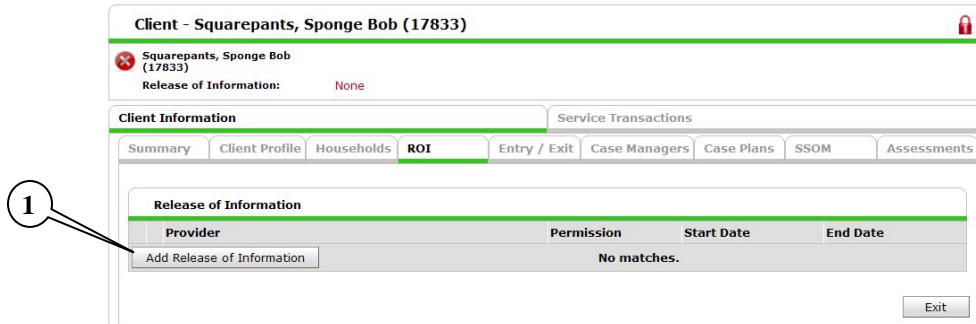
Date of Birth	06/03/1956
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	Black or African American (HUD)
Secondary Race	Black or African American (HUD)
Ethnicity	Non-Hispanic/Non-Latino (HUD)

**Household Data Sharing**

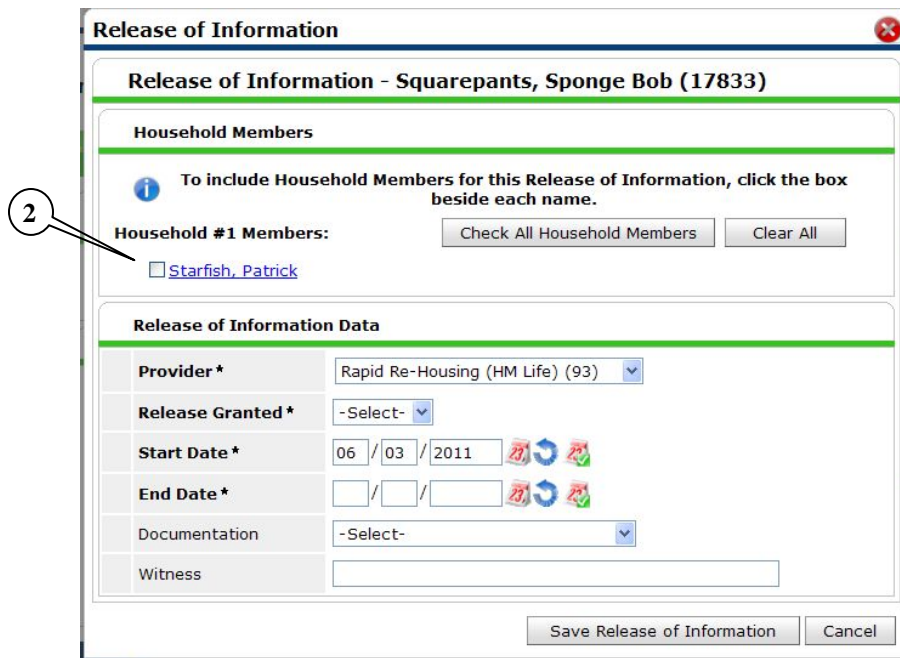
Add Household Data button

**TO ADD OR EDIT A ROI (RELEASE OF INFORMATION):**

1. Click on the **ROI** tab on the **Client Profile** screen.
2. The **Release of Information** window will display.



3. Click the **Add Release of Information (1)** button and the **Release of Info Data** window shown below will display.



4. If the ROI will cover other members of the client's household, click the check boxes (2) next to the client's names in the **Household Members** section.
5. Enter the appropriate information for the release. ROI's expire 1 year from the start date.
6. Click on **Save Release of Information** to save and exit.

## IS THE CLIENT AND THEIR FAMILY ELIGIBLE FOR THE HPRP PROGRAM:

1. From the Client Profile screen, click on the **Add Household Data** button ( see page 6). The Household Data Sharing screen will display.

The screenshot shows the 'Household Data Sharing' window. At the top, under 'Household Members', there is a note: 'To include household members in this "Household Assessment", click on the box beside each name. Note: Only members from the same household may be selected.' Below this, under 'Household #1 Members', there is a checkbox next to 'Starfish, Patrick'. A callout circle with the number '1' points to this checkbox. Below the members section, there are buttons for 'Check All Household Members' and 'Clear All'. The main section is titled 'Household Data Sharing' and contains several fields: 'HMIS Participants Only' with 'Is Client Homeless?' (Yes) and 'Extent of Homelessness?' (First Time Homeless); 'HMIS & HPRP Participants' with 'Speaks English?' (-Select-), 'Primary Language Spoken', 'Secondary Language Spoken', 'Primary Race' (Black or African American (HUD)), 'Ethnicity' (Non-Hispanic/Non-Latino (HUD)), 'Type of Prior Living Situation' (Emergency shelter, including hotel or motel paid for with emergency shelter voucher(HUD)), and 'Zip Code of Last Permanent Address' (44305). Below this, there are 'Zip data quality' (Full or Partial Zip Code Reported (HUD)), 'Length of Stay (at Prior Residence)' (One to three months (HUD)), and 'Secondary Race' (Black or African American (HUD)). The bottom section is 'HPRP Participants Only' with 'Housing Status' (Literally Homeless (HUD)) and 'Client eligibility confirmed by the provider?' (-Select-). A callout circle with the number '2' points to the 'Client eligibility confirmed by the provider?' dropdown. At the bottom right, there are buttons for 'Save', 'Save & Exit', and 'Exit'.

2. Click the check boxes next to the household members names (1).
3. Select Yes from the **Client eligibility confirmed by the provider?** Picklist (2) if the client and family is eligible for the program or No if the client and family are not eligible.
4. Click **Save and Exit**.

## TO ENTER A CLIENT INTO THE HPRP PROGRAM:

Every eligible HPRP client must have an entry/exit that records the date you started working with the client using HPRP funds and the date that you stopped working with them.

1. To enter the client into your program, click on the **Entry/Exit** tab (1) on the Client profile screen.

Client - Squarepants, Sponge Bob (17833)

Squarepants, Sponge Bob (17833)  
Release of Information: Ends June 5, 2012

Client Information | Service Transactions

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

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

Program	Type	Entry Date	Exit Date
No matches.			

Add Entry / Exit

Exit

2. Click on the **Add Entry/Exit** button (2) and the following screen will display.

Entry / Exit - Squarepants, Sponge Bob (17833)

Household Sharing

Add Household Data

Household Members

To include Household members in these Entry / Exits, click the box beside each name.

Household #1 Members:  Starfish, Patrick

Check All Household Members Clear All

Entry Data

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

Provider\* Rapid Re-Housing (HM Life) (93)

Type\* -Select-

Entry Date\* 06 / 06 / 2011 10 : 34 : 21 AM

Save & Continue Cancel

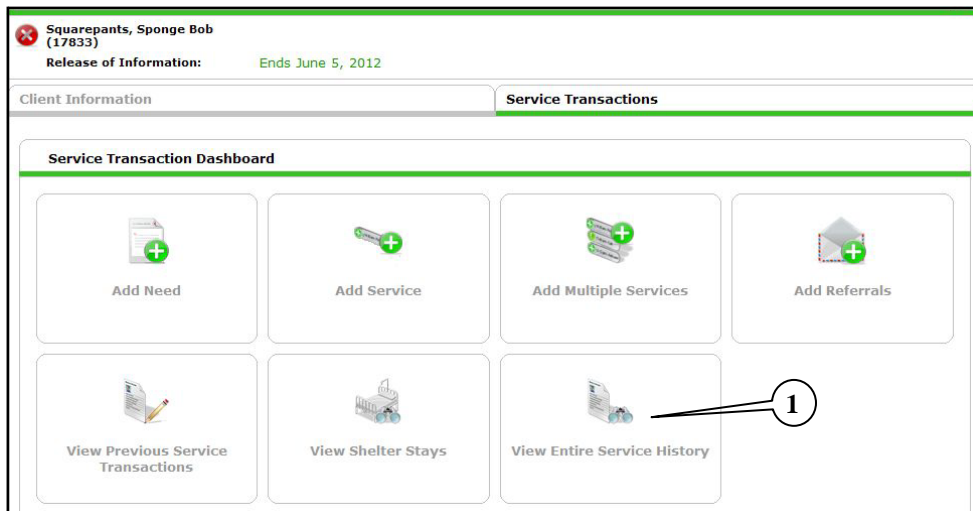
3. Click the check boxes next to the household members names (3).
4. Choose **HPRP** in the **Type** picklist (4).
5. Type in the date that you began working with the client in the **Entry Date** field (5).
6. Click on **Save and Continue**. You can enter any incomplete or missing data at this point.
7. Click **Save and Exit**.

## SERVICE TRANSACTIONS

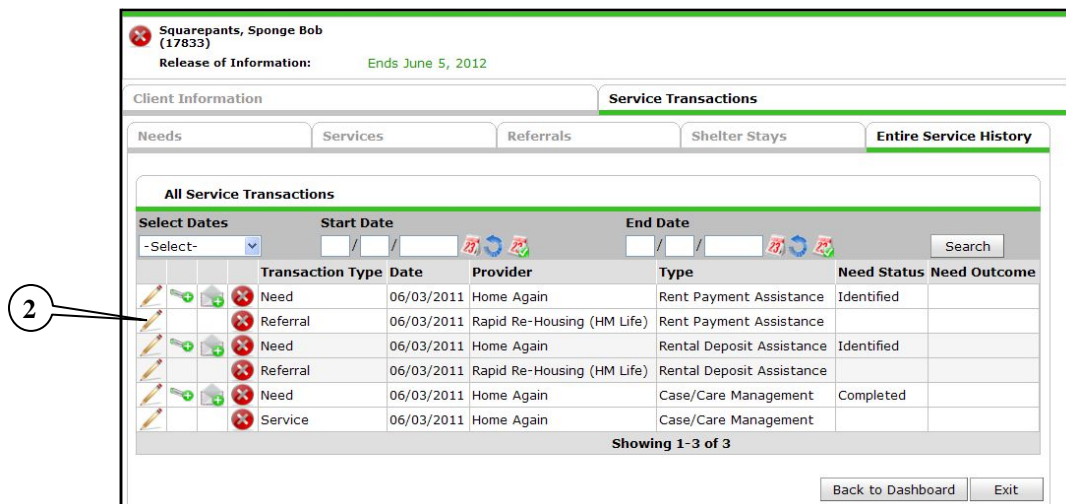
Your client will have needs associated with them that were identified during Central Intake. When a client begins receiving services such as case management or financial assistance, Service Transactions must be created. Service Transactions and additional information can be added or captured at anytime during a client's relationship with your program.

### TO ENTER SERVICES BASED ON IDENTIFIED NEEDS/REFERRALS FROM CENTRAL INTAKE:

1. From the **Client Profile** screen, click on the **Service Transactions** tab and the following screen will display.



2. Click on the **View Entire Service History (1)** button. The following screen will display.



3. Click on the pencil ( 2) in front of the referral and the screen on the next page will display.

✖ **Squarepants, Sponge Bob (17833)**  
**Release of Information:** Ends June 5, 2012

Client Information
Service Transactions

**Edit Referral**

▼ **Household Members**

To update Household Members' data, click on the box beside each name.

**Household #1 Members:** Check All Household Members

[Starfish, Patrick](#)

**Need Information**

Need	Rent Payment Assistance (BH-3800.7000)
Provider	Home Again (91)
Date of Need	06/03/2011 11:01 AM
Amount if Financial	No amount entered.
Notes	No notes entered.

**Referral Data**

Referred-To Provider: Rapid Re-Housing (HM Life)

**Needs Referral Date \*** 06 / 03 / 2011   11 : 01 : 12 AM

If Canceled, Reason: -Select-

Projected Follow Up Date:  /  /

Follow Up User: Rapid Re-Housing (HM Life) (93)   
 -Select-

Follow Up Made: -Select-

Completed Follow Up Date:  /  /

**Status and Outcome**

**Status \*** Identified

Outcome: -Select-

If Not, Reason: -Select-

▼ **Service**

**Service Provider \*** Rapid Re-Housing (HM Life) (93)

**Start Date \*** 06 / 06 / 2011   12 : 59 : 18 PM

**End Date** 06 / 06 / 2011   12 : 59 : 18 PM

**Service Type \*** -Select-

Provider Specific Service: -Select-

Service Notes:

Status Picklist

Service Provider

Continued on next page

4. If you are **NOT** going to be providing a service for the referral, choose **CLOSED** from the **Status** picklist in the **Status and Outcome** section and then click on **Save & Exit**.
5. If you are providing a service for the referral, make sure the **Service Provider** field lists your provider. Change to your provider if necessary.
6. Select from the picklist for either the **Housing Relocation & Stabilization Service Provided** or **Financial Assistance Type**. You must complete one of these fields in each HPRP service transaction, but **NOT BOTH**.

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**WHEN PROVIDING A HOUSING RELOCATION AND STABILIZATION SERVICE:**

1. Enter a **Start Date** and **End Date** for the service.
2. Choose an **HPRP Housing Relocation & Stabilization Service Provided** (non-cash services) from the picklist. Picklist options include:
  - Case Management
  - Outreach and engagement
  - Housing search and placement
  - Legal services
  - Credit Repair
3. You do not need to fill in the Sources of funding, the Cost of Service or the # of Units.
4. Choose the status of the service transaction in the **Status and Outcome** section. Picklist options include:
  - Closed
  - Identified
  - Completed
  - In Progress
5. Click **Save** when you are finished.

**WHEN PROVIDING A FINANCIAL ASSISTANCE SERVICE:**

1. Enter a Start Date and End Date for the service.
2. Select the **HPRP Financial Assistance Type** (cash assistance) from the picklist. Picklist options include:
  - Rental assistance
  - Utility payments
  - Security deposits
  - Moving cost assistance
  - Utility deposits
  - Motel & hotel vouchers
3. You must choose up to two Sources of funding and the Cost of Services for each source. Source 1 is Federal and Source 2 is State.

*Example:* If you are providing current rent payments for September and October you will want to make a separate transaction for each month, the first transaction will be the start date of September 1, 2009 to the end date of September 30, 2009; and the second will start on October 1, 2009 and end date of October 31, 2009. To create a service transaction for rental arrears, however, you must make the start and end dates the SAME DAY in which you are providing assistance. For example, if you provide a client with 3 months of rent arrears in September, you will create 1 transaction with the start and end date the same day to reflect 3 arrears-months (units), total cost of service and unit cost.

4. The **# of Units** is the number of months rent or utilities.
5. Choose the status of the service transaction in the **Status and Outcome** section.
6. Click on **Save** when you are finished.

**To ENTER A NEW SERVICE:**

1. Click on the **Service Transactions** tab on the Client Profile screen. Click the **Add Multiple Services** button and the following screen will display

**Client - Squarepants, Sponge Bob (17833)**

Squarepants, Sponge Bob (17833)  
Release of Information: Ends June 5, 2012

Client Information | **Service Transactions**

Save Cancel

**Household Members**

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

Household #1 Members:  Starfish, Patrick Check All Household Members Clear All

**Multiple Services**

Note: 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.

Provider\* Rapid Re-Housing (HM Life) (93)

**Service List**

Number of Services\*

Start Date\*   :  :

End Date   :  :

Service -Select-

HPRP Housing Relocation & Stabilization Service Provided -Select-

HPRP Financial Assistance Type -Select-

**Service Costs**

**Funding Sources**

Source	Amount Paid By Source
<input type="button" value="Add Funding Source"/>	

Number of Units

Unit Type -Select-

Cost of Units

Status\* -Select-

Remove Clear

Add Another Remove All Clear All

Save Cancel

2. Check the box next to the **Household Members (1)** if applicable.

3. Your HPRP provider should automatically load in the **Provider** field. Change to your provider if necessary.
4. Select from the picklist for either the **Housing Relocation & Stabilization Service Provided** or **Financial Assistance Type**. You **must** complete one of these fields in each HPRP service transaction, but **NOT BOTH**.

**WHEN PROVIDING A HOUSING RELOCATION AND STABILIZATION SERVICE:**

1. Enter a **Start Date** and **End Date** for the service.
2. Choose an **HPRP Housing Relocation & Stabilization Service Provided** (non-cash services) from the picklist. Picklist options include:
  - Case Management
  - Outreach and engagement
  - Housing search and placement
  - Legal services
  - Credit Repair
3. Choose the status of the service transaction from the **Status** picklist. Picklist options include:
 

Closed	Identified
Completed	In Progress
4. Click **Save** when you are finished.

**WHEN PROVIDING A FINANCIAL ASSISTANCE SERVICE:**

1. Enter a **Start Date** and **End Date** for the service.
2. Select the **HPRP Financial Assistance Type** (cash assistance) from the picklist. Options include:
 

Rental assistance	Utility payments
Security deposits	Moving cost assistance
Utility deposits	Motel & hotel vouchers

- You must choose up to two **Sources of funding** and the **Cost of Services** for each source. Source 1 is Federal and Source 2 is State.

*Example:* If you are providing current rent payments for September and October you will want to make a separate transaction for each month, the first transaction will be the start date of September 1, 2009 to the end date of September 30, 2009; and the second will start on October 1, 2009 and end date of October 31, 2009. To create a service transaction for rental arrears, however, you must make the start and end dates the SAME DAY in which you are providing assistance. For example, if you provide a client with 3 months of rent arrears in September, you will create 1 transaction with the start and end date the same day to reflect 3 arrearage months (units), total cost of service and unit cost.

- The **# of Units** is the number of months rent or utilities.
- Choose the status of the service transaction in the **Status** picklist.
- Click on **Save and Exit** when you are finish.

**To EXIT A CLIENT FROM THE HPRP PROGRAM:**

- Click on the **Entry/Exit** tab on the Client Profile screen and the following screen will display.



- Click on the pencil under the **Exit Date** (1). The screen on the next page will display.

**Entry / Exit - Squarepants, Sponge Bob (17833)**

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**Household Sharing**

Add Household Data

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**Household Members Associated with this Entry / Exit**

Name	Head of Household	Entry Date	Exit Date	Reason for Leaving	Destination
-Select- <span style="float: right;">Add Related Entry/Exit</span>					

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**Exit Data**

**Exit Date \*** 06 / 07 / 2011 12 : 20 : 27 PM

Reason for Leaving: -Select-

If "Other", Specify:

**Destination \*** -Select-

If "Other", Specify:

Notes:

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**Home Again Intake Exit Assessment**

**GENERAL CLIENT INFORMATION**

Date of Application: 06 / 03 / 2011 G

Client eligibility confirmed by the provider?: -Select- G

3. Fill in the **Exit Date (1)**, **Reason for Leaving (2)** and **Destination(3)**. *Update the income and non-cash benefit sub-assessment if the clients situation has changed.*
4. Click on the Service Transaction tab and close any open and on going case management or other non-financial services.