Home Again

HPRP

Homeless Prevention And Rapid Re-Housing

Hmis Service Point 5

For Agencies

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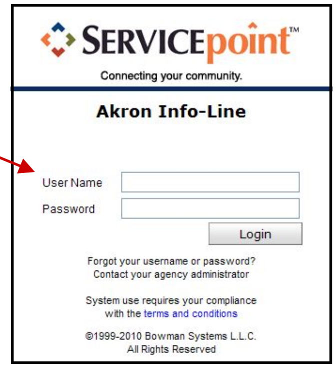
To Logon to ServicePoint:

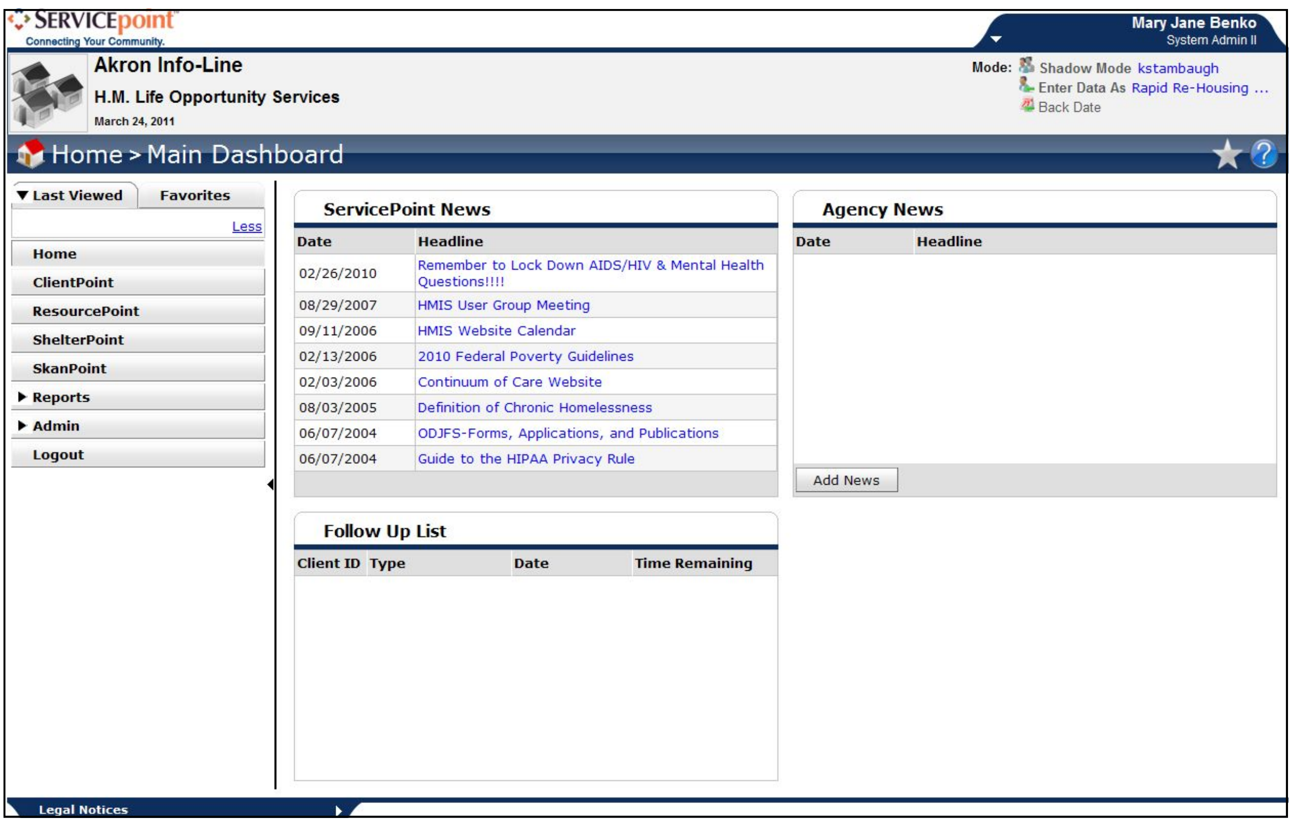
1. Establish your Internet connection and type the following web address to access the Logon site.

http://hmissummit.servicept.com

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



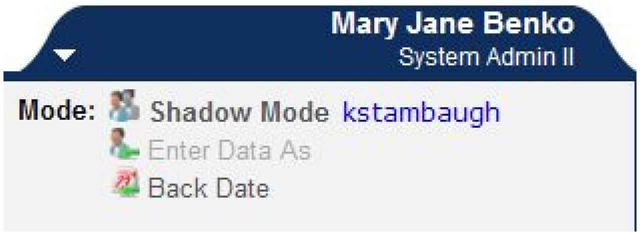
3. Your main ServicePoint navigation screen will appear.



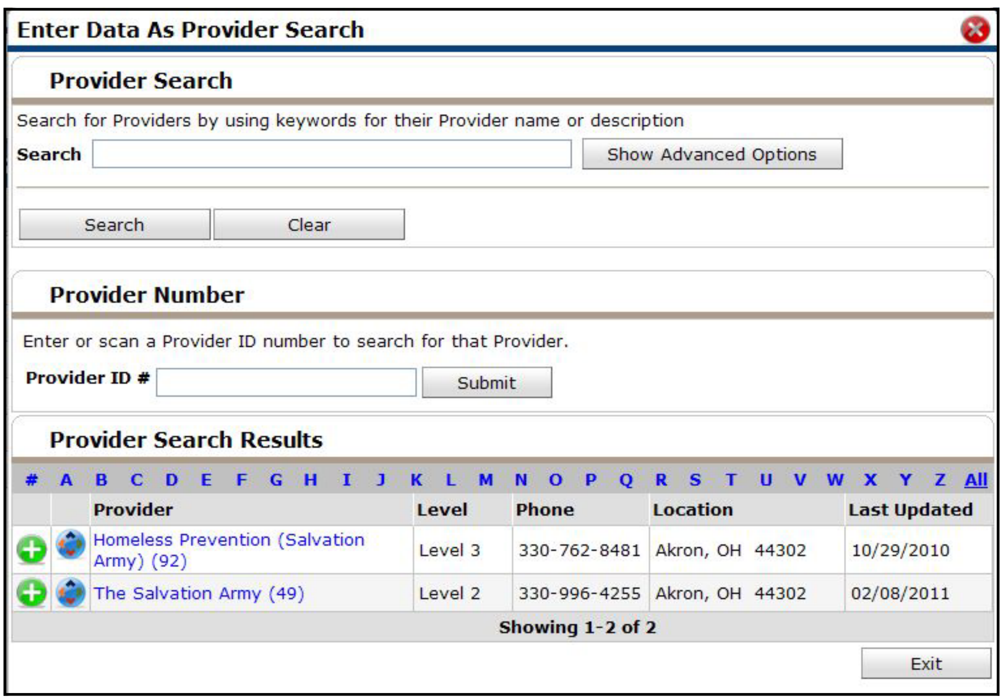
When you are entering/editing assessment data, adding an HPRP Entry/Exit or entering service transactions you must change to the appropriate HPRP provider.

To change to your HPRP provider:

1. To access your HPRP provider click on **Enter Data As**" in the upper right hand corner of the screen.



2. A screen will display listing all the agencies to which you currently have access. Select the appropriate HPRP provider by clicking the green plus sign to the left of the agency name.



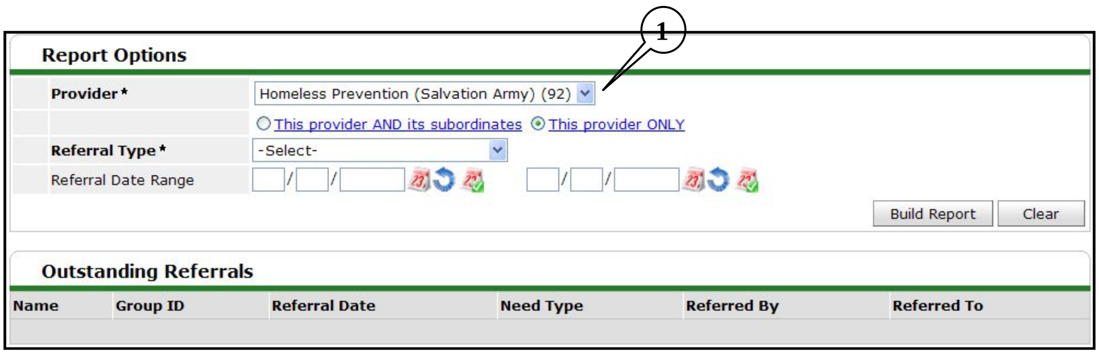
3. After you click on your HPRP agency link, the page will refresh and you will see your HPRP provider listed in orange above your name in the blue ServicePoint header.

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.

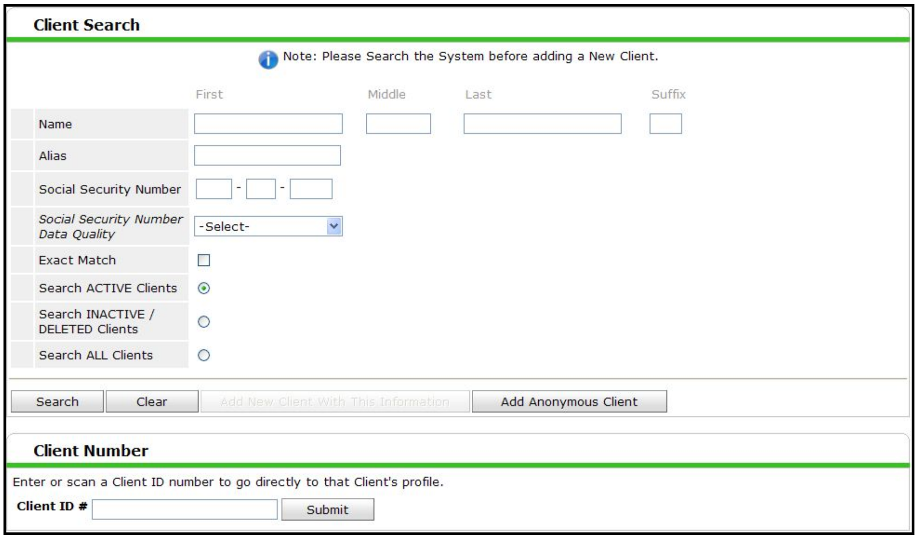
1. Click on the **Reports** tab on the Main Dashboard and then click on the **Outstanding Referrals** tab.



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.

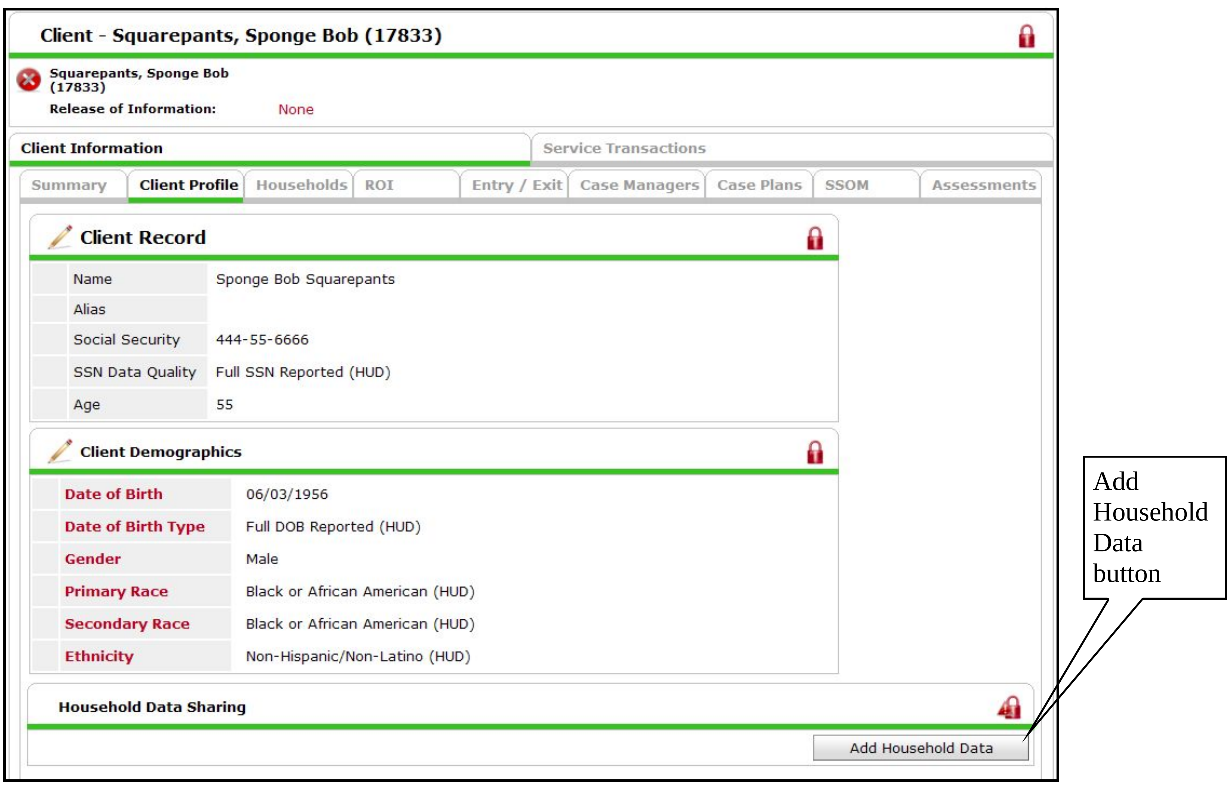
To Search for a client After printing the referral report:

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



2. Type in the client's ID or their name and click on the **Submit** button.

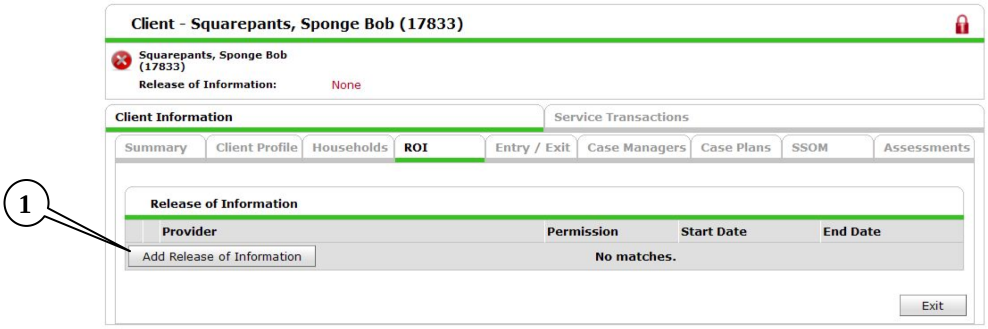
3. The client's profile will display.



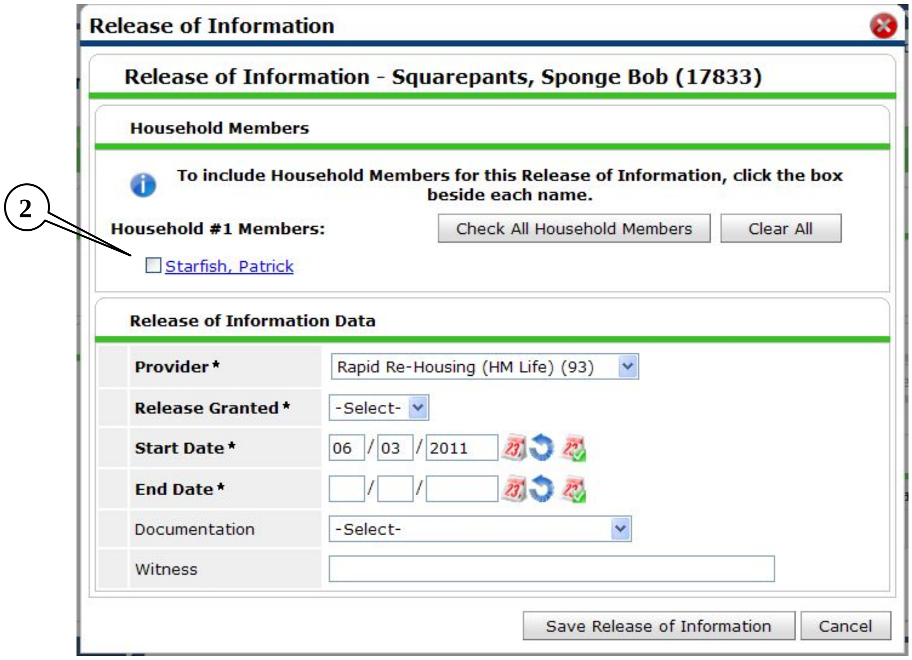
To add or edit a ROI (Release of Information):

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.



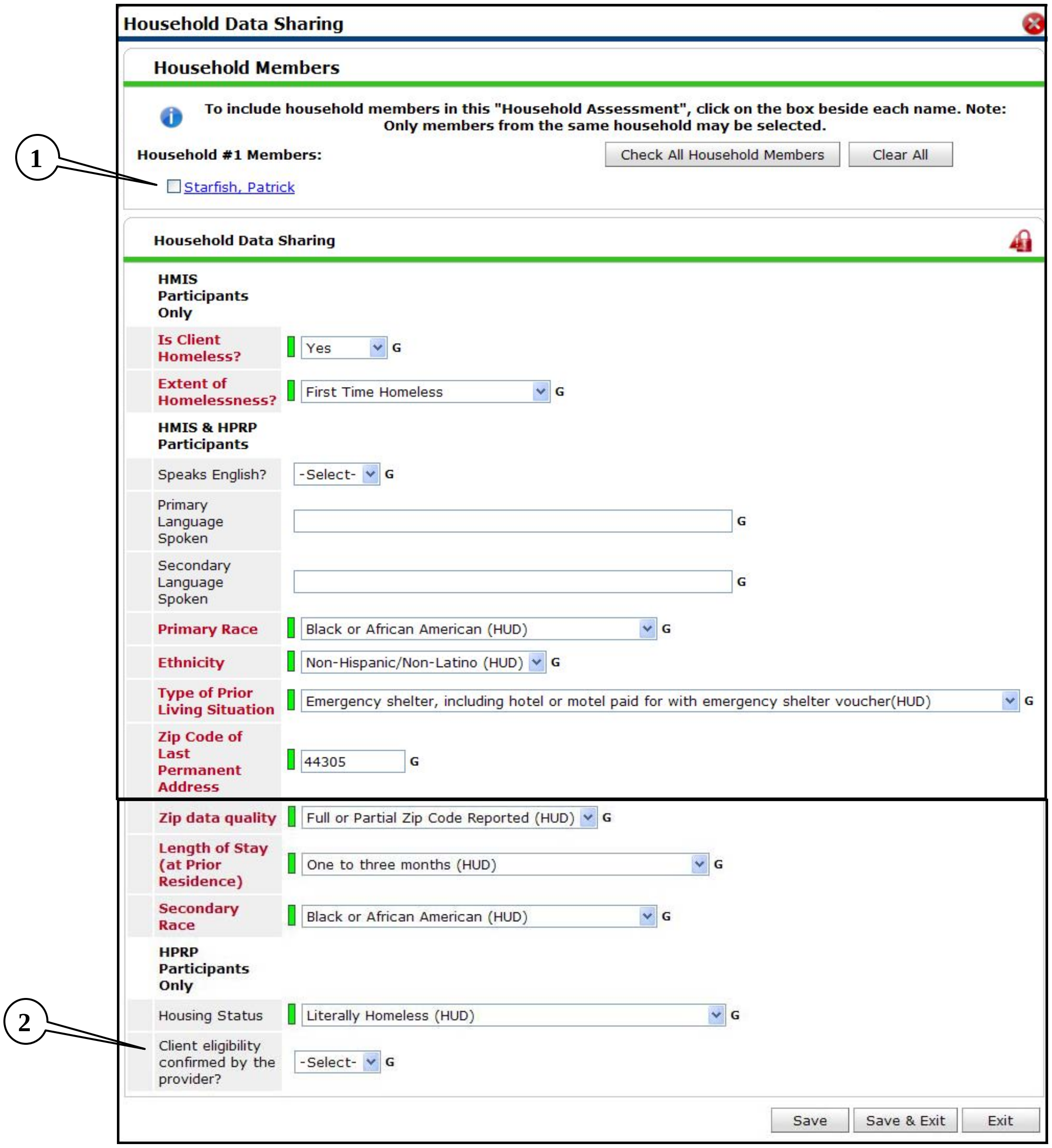
4. If the ROI will cover other members of the client's household, click the check boxes **(2)** next to the client's names in the **Household Members** section.

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.



2. Click the check boxes next to the household members names **(1).**

3. Select <u>Yes</u> from the **Client eligibility confirmed by the provider?** Picklist **(2)** if the client and family is eligible for the program or <u>No</u> if the client and family are not eligible.

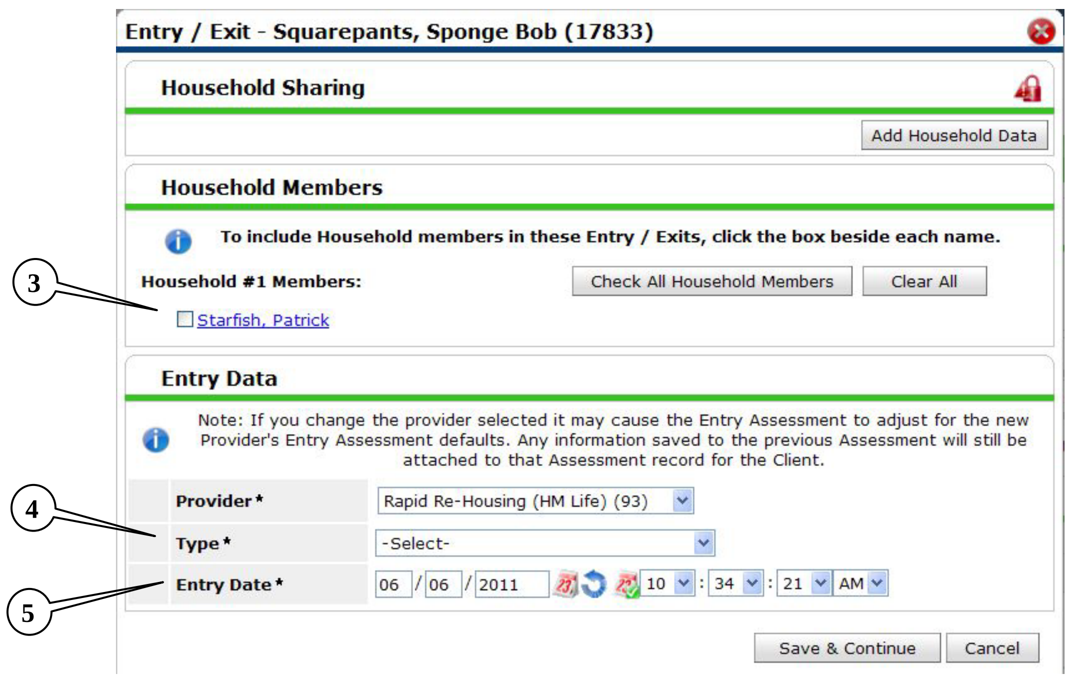
4. Click **Save and Exit**.

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.

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



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.

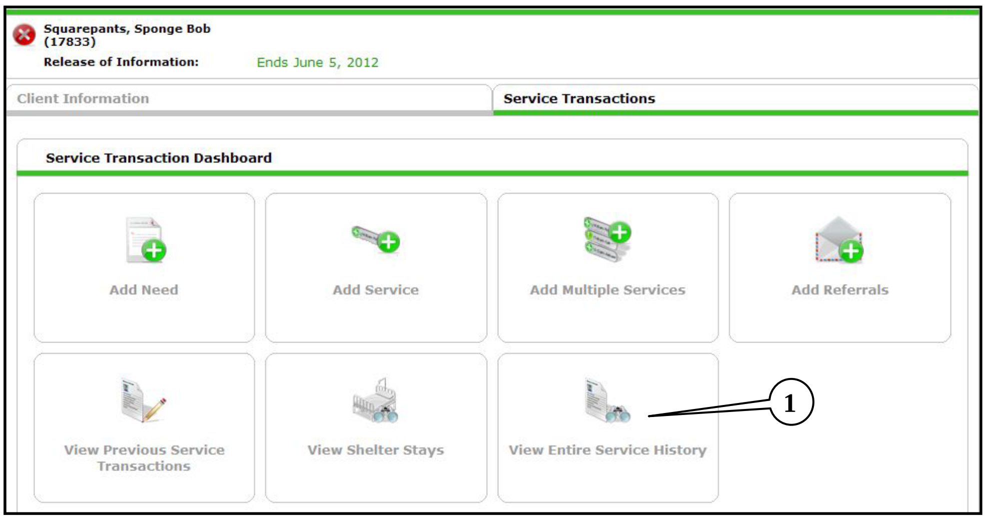
7. Click **Save and Exit**.

Service Transactions

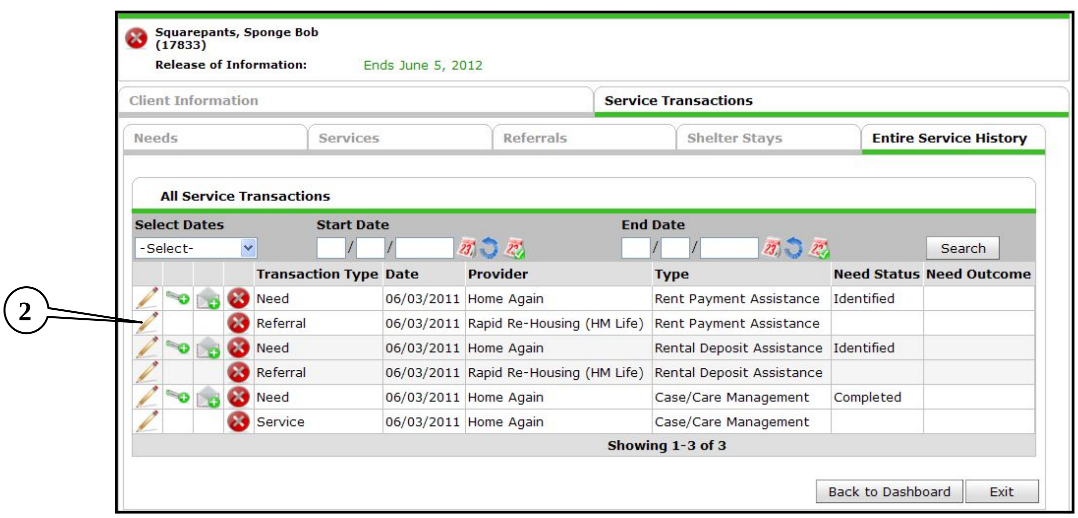
Your client will have needs associated with them that were identified during Central Intake. When a client begins receiving services such as case management or financial assistance, Service Transactions must be created. Service Transactions and additional information can be added or captured at anytime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

To Enter Services Based on Identified Needs/Referrals from Central Intake:

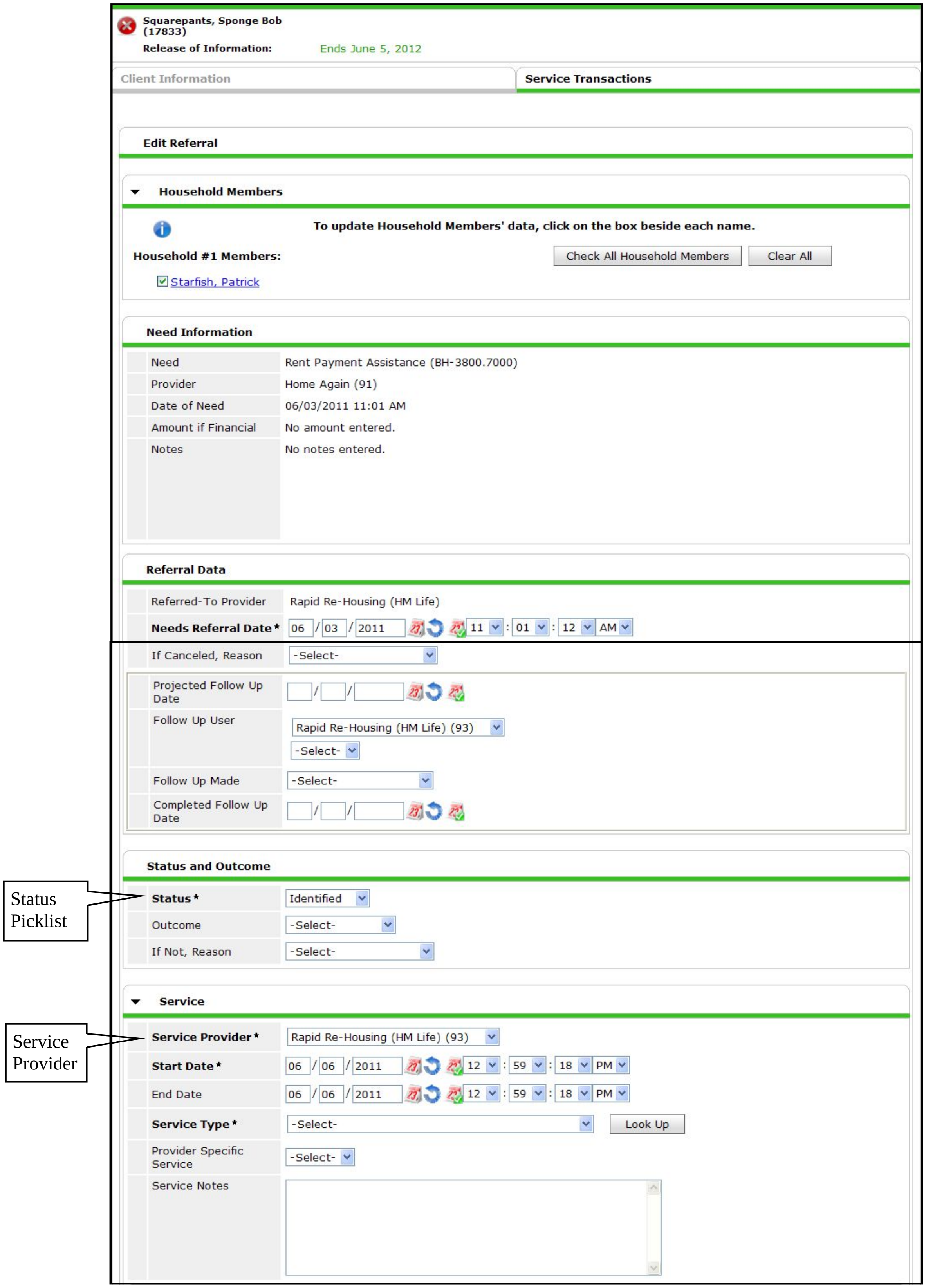
1. From the **Client Profile** screen, click on the **Service Transactions** tab and the following screen will display.



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 | Clear All

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- Look Up
Provider Specific Service	-Select-
Service Notes	

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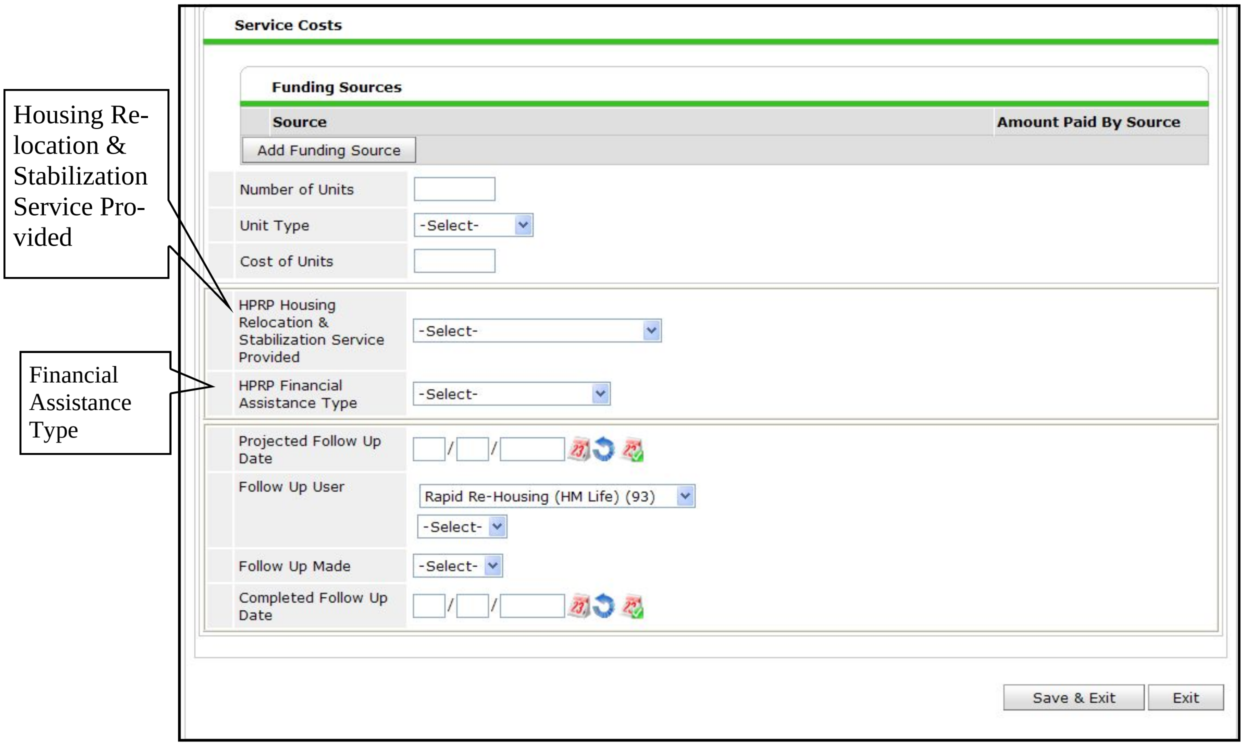


4. If you are **NOT** going to be providing a service for the referral, choose **CLOSED** from the **Status** picklist in the **Status and Outcome** section and then click on **Save & Exit**.

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**.

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 arrearage months (units), total cost of service and unit cost.

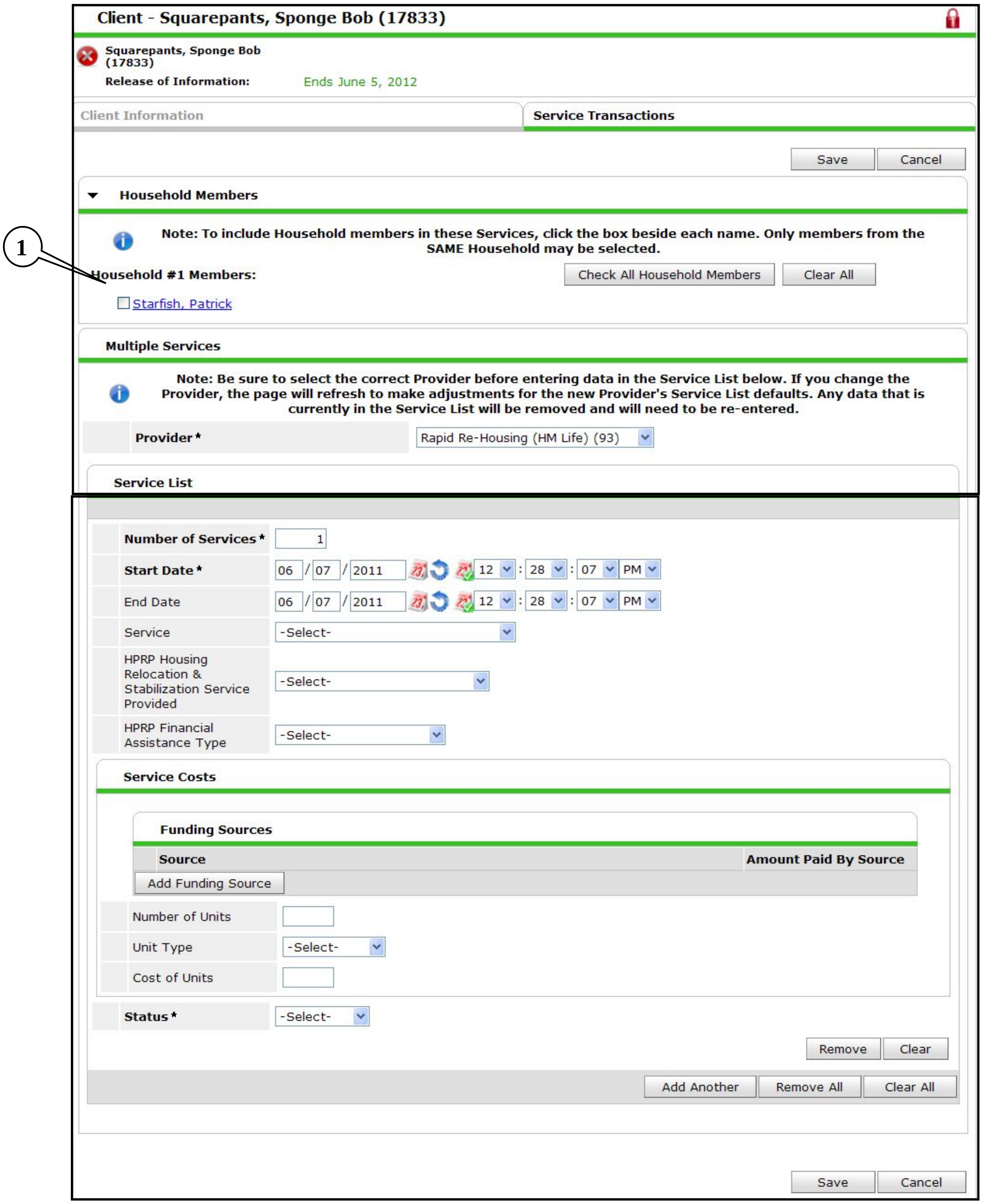
4. The **# of Units** is the number of months rent or utilities.

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



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

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 arrearage months (units), total cost of service and unit cost.

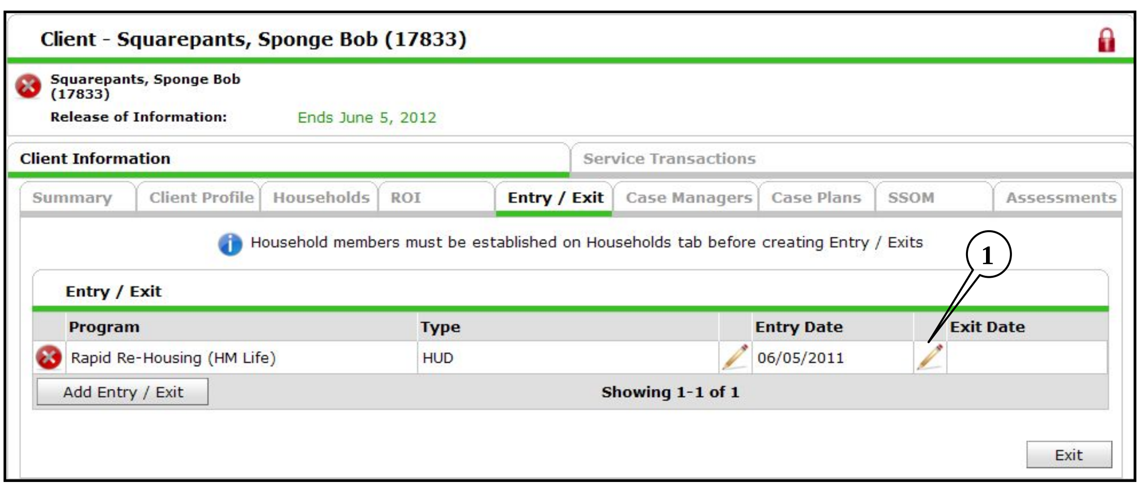
4. The **# of Units** is the number of months rent or utilities.

5. Choose the status of the service transaction in the **Status** picklist.

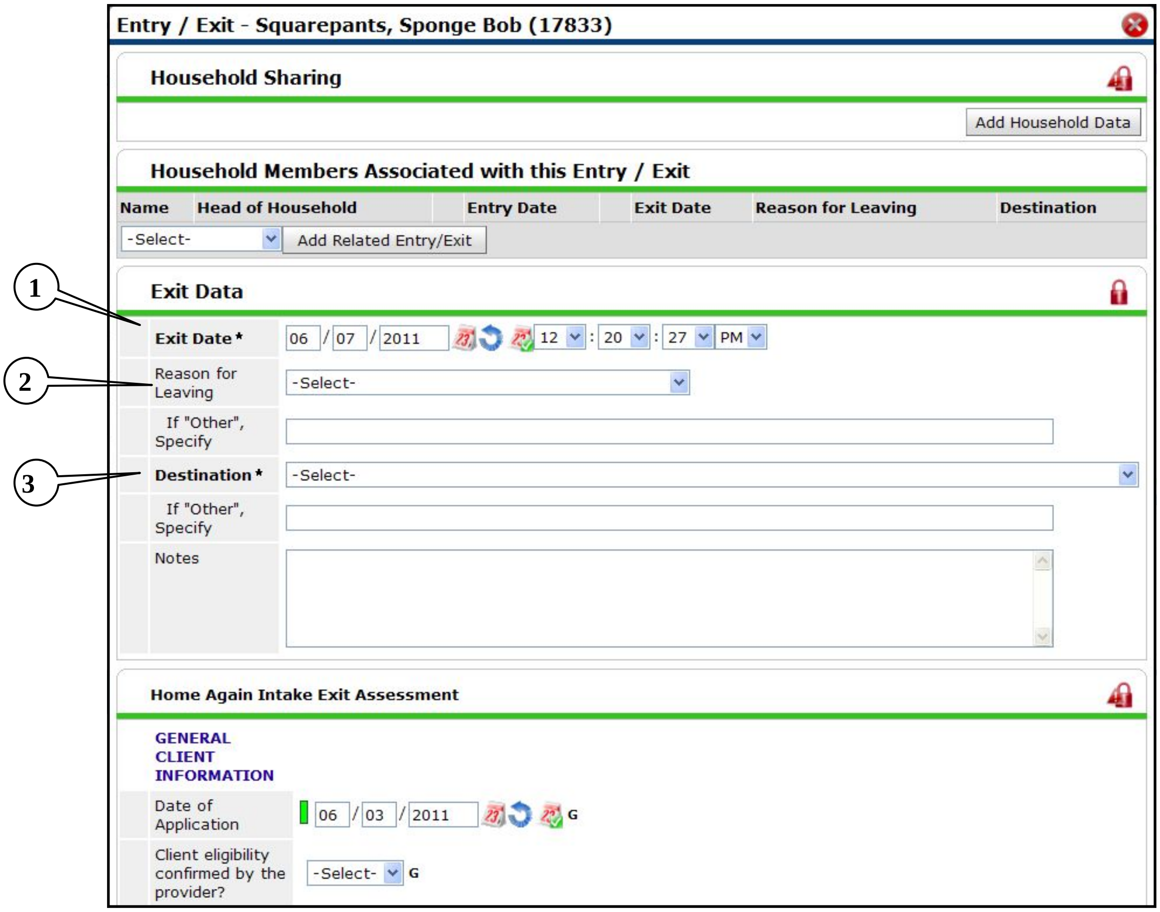
6. Click on **Save and Exit** when you are finish.

To Exit a Client from the HPRP Program:

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



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



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.