ServicePoint 5.4.1

June, 2011
# Table of Contents

Workflow for ServicePoint ................................................................................ 3
Introduction .................................................................................................... 4
Logon to ServicePoint .................................................................................... 4
Key Features of the Home Screen ................................................................. 5
Searching for an Existing Client ..................................................................... 7
Adding a New Client ....................................................................................... 9
ShelterPoint Screen ....................................................................................... 10
Creating a Household .................................................................................... 13
Adding a Client who is already in Servicepoint to a Household ................. 16
Assigning Beds to Household Members ...................................................... 18
Release of Information ................................................................................ 19
Household Sharing ....................................................................................... 21
Client Assessment ......................................................................................... 22
Back-dating Mode ......................................................................................... 24
Deleting Clients ............................................................................................ 25
Exiting a Client ............................................................................................... 26
Recap of Important Policies ........................................................................... 29
Workflow for Entering Clients into ServicePoint

1. From the Main Dashboard, click on the ShelterPoint tab.
2. Click on the Client Check In tab.
3. In ShelterPoint, choose a bed for the client.
4. Search for the client in the Client Search screen. If client is not in the system, add the client to ServicePoint.
5. Create a Household (if you are working with families)
6. Add Client ROI (be sure to check all household members if you are working with families)
7. Choose Household Sharing to enter data for all members of the household.
8. Complete the client’s assessment
Introduction and User Agreements

This manual is designed to serve as a training tool as well as a reference guide for basic data entry in the Summit County Homeless Management Information System (HMIS). Before you can use the HMIS you will need to read and sign all HMIS User Agreements and complete necessary HMIS User Training and follow-up assessments.

Once training is completed and your Agency HMIS Administrator approves your level of readiness, you will be assigned a unique user ID and password that is to be used by only you and to be kept confidential.

At any time if you forget your user ID or password, you may contact your Agency HMIS Administrator and get your password reset.

You should have received:

- Summit County HMIS Policies and Procedures Manual
- HMIS User Agreement
- Helpdesk contact information

Login to ServicePoint

Establish your internet connection and open the Internet Explorer Window. Type the following web address to access the Login website.

https://hmissummit.servicept.com

IMPORTANT NOTE: All transactions you complete while logged in the system are being recorded within your user profile. It is important you do not share your Logon ID and password with anyone else in your office, you will be held responsible for all transactions completed under your own ID. Your Agency HMIS Administrator will be able to run a report to see all transactions completed by each user profile.
Key Features of the Main Dashboard

The top left hand side of this screen (1) indicates the name of your Service Point installation, the current date and the name of your provider.
Below this is a colored heading that indicates the module you are viewing. In this case, the Home>Main Dashboard (2).
Below this are a series of tabs in a navigation box (3). Which tabs appear on your screen depends on the settings established by the administrator who set up your account. Each of these tabs is a link to one of the various modules of ServicePoint. Arrows next to a tab, such as in Reports and Admin, indicate that the tab expands to show additional subsections.
To the right of the navigation box is the ServicePoint News box (4), the Agency News box (5), and the Follow Up List box (6).
System Administrators can post news for every agency in this ServicePoint installation here or for a specific agency. Click the blue highlighted text to read more about a message posted here.
The Follow Up List box includes a list of clients who have projected follow-up dates noted in their file.

The Last Viewed tab (7) allows convenient navigation by listing the last 10 clients accessed during a login session. The Less hyperlink option allows you to reduce the number of last viewed items that are displayed (8).
The Favorites tab displays a user-created list of up to 10 clients or providers.

When inside a client profile or provider profile the user can add an entry to the Favorites menu. Click the gold star to add the item to your Favorites list.

The gold star indicates that something on the page can be put on the Favorites list. A silver star means there is nothing on the page that can be added to the Favorites list.

Navigation

ServicePoint is designed to allow navigation within the application as well as with the browser navigation, such as the Back and Forward arrows. Each tab or link you click will direct you to the next screen and also provide buttons to return you to the previous screen. Clicking the Refresh button on your browser will log you out of your session.

Logging onto your Provider Program

If clients will only be entered into one program, you will want to log onto that program before you search for the client or add the new client record. If the client will be moving from program to program within the same agency, you will want to enter their data at the agency level and just designate the program on all Entry/Exit forms and Services. Make this decision before you start entering data and then be consistent. This may make a difference in the data that is shared between programs at your agency.

To change your provider, click the “Enter Data As” in the upper right of your screen. The Provider Search Results screen will display. Click the green plus icon next to the program name you would like to enter data as.
Client Search and Adding a New Client

Searching for an Client:

1. Click the **ShelterPoint** tab (1) on the navigation toolbar. The screen will refresh and display the ShelterPoint screen.

2. Click on the **Check Client In** button (2) and the Shelter Inventory screen will display.

3. To assign a client to a bed, click the **Green Plus** icon (3) or the **Empty** link (4) and the Client Search window will display as shown on the next page.
4. Enter the client’s name and SS# in the Search fields. Click the Search button and if the client has been in the system before a list of possible matches (Client Results) will display at the bottom of the screen.

5. Click the Edit icon to enter the client in ShelterPoint.
Adding a new client:

1. If the Search Results do not include your client’s name, a new client record will need to be created. Click **Add Client with this Information** button (1).

The following warning window will appear.

![Create Client? dialog box](image)

2. Click OK to continue.

3. The client’s name will appear in the Client Results section at the bottom of the screen.

4. Click the Green plus icon (➕) to the left of the client’s name and the screen will refresh and display the Unit Stay Entry Data in ShelterPoint as shown on the next page. The client is now in the ServicePoint database and has a unique Client ID.

Anonymous Clients

Some agencies are required to maintain anonymity of their clients by program policies. These agencies will use the **Add Anonymous Client** button to add a new client. Once a client has been added as an anonymous client, it is critical to keep track of client ID numbers. Without a client ID number of an anonymous client, there is no way to retrieve the client information in ServicePoint.
ShelterPoint Screen

The ShelterPoint screen is divided into the following sections:

- **Incidents** - You can record incidents to indicate when a client is banned from a program either for a period of time or indefinitely.
- **Household Sharing** - Useful for entering client information about all members of a household.
- **Households Overview** - Enables you to enter household members.
- **Household Members** - List the household members.
- **Release of Information** - A Release of Information (ROI) is required to share information with other providers.
- **Client Assessment** - Enables you to enter client data
- **Services** - Enables you to enter services provided to the client.
Verify that the correct program is in the **Provider** field and that the **Type** field contains **HUD**.
Note: Your agency will need to decide ahead of time which services to track in ShelterPoint and work with your HMIS Administrator to get these services set up on your quicklist to make this workflow as smooth as possible.
Creating A Household

Creating a household gives the user the ability to assign services to everyone in the household. Households are typically configured in family units with one person as the head of the household. When other members are added to the household, they are identified by their relationship to the Head of Household. If a person is single, do not create a household.

*Note: Create household members before creating an ROI or completing the assessment. This allows the Household information to be included in the assessment and ROI.*

To Create a New Household:

1. Click the black arrow in the Household Overview section.

2. Click on the Start New Household button. The Add a New Household window will display.

3. Start adding the household, beginning with the Head of Household. Select a Household Type from the pick list.

   The **Head of Household** field defaults to “No.” The field only needs to be altered for the Head of Household. Select Relationship to Head of Household from the pick list. If the client is the Head of Household, select Self. The **Date Entered** field defaults to the current date. Change to reflect the date the client entered into the household. **Date Removed** should remain blank until the client exits the household.

4. Click **Save** to add the household. The screen will refresh and the Household Overview screen will display. The newly added household will display.
5. To add other household members, complete the fields in the **Client Search** section. Search to make sure the household member is not already in ServicePoint. If the household member is not in ServicePoint, click the **Add New Client With This Information** button. The household member will appear in the **Household Overview** section. Add household members one at a time. When you are done adding members, click the **Exit** button.

**To Edit a Household:**

1. In the **Household Overview** screen, click the **Edit** icon (1) to edit the household and the **Edit Household** screen on the next page will display.

![Image of Edit Household screen]
2. To Edit the Household Type, choose from the pick list in the Household Type section (1). Click Save to retain the change.

3. To Remove a client from the household, click the Edit icon (2) and put in the date they left in the Date Removed field. Adding a Date Removed keeps the client listed in the household for historical reference, but the client will not be counted as a household member. The Red Minus icon (3) will remove a client from the household and the client will no longer show as a member of the household.

4. To change a client’s household member information, click on the Edit icon (pencil) next to the client and the Edit Household Member screen will display.

6. Change the fields that are needed and click Save to retain the changes or click Exit to return to the Edit Household screen without retaining the changes.
To Add a Client who is already in ServicePoint to a Household:

1. From the **Edit Household** screen, enter the client’s name and SS# in the **Client Search** area.

2. Click Search. The screen will refresh and Client Results will display a list of clients that are possible matches for the entered client information.

3. Click the **Green Plus** icon to add the client to the household.
4. The Add New Household Member screen will display. Fill in the appropriate information and click Save.

Important Information about Households

Create a household and household members before entering clients into Shelterpoint and creating an ROI, so that you can record services for all family members at one time. If your agency is not providing services to all members of a household, it will appear that you are providing services to them all if you enter them as a part of the ServicePoint household connected to your program. We recommend that you do not enter these persons as part of the ServicePoint household connected to your program. If they receive services later, add them to the household connected to your program at that time.

Although you can delete clients from a household, you should only do so if the client is not a member of that household. If the client is a member of the household and you wish to remove them, then you should enter the date they were removed in the Date Removed field on the Household screen.
Assigning Beds to Household Members

1. In the Household Members section, click the box next to each household member’s name and then click on the Assign Unit button for each member of the household. If you do not assign a bed unit, the client will be put in overflow.

2. Select the appropriate bed from the bed list. Click Select.

3. The household member will be assigned the appropriate bed.
Release of Information (ROI)

A Release of Information (ROI) is required to share client information with other providers in your community. As of March 1, 2010 everything but AIDS/HIV, mental health and entry/exit information will be shared.

To Create an ROI

1. In the Release of Information section in ShelterPoint, click on the View ROI Details button.

2. The Release of Information window will display. Click the Add Release of Information button.

3. The Release of Information window will display.
4. If the ROI will cover other members of the client’s household, click the checkboxes next to the clients’ names in the Household Members section.
   Select the Provider issuing the ROI. The field defaults to the user’s current provider.
   Indicate whether or not the client granted the ROI by making a selection from the Release Granted pick list.
   Enter the Start Date for the ROI in mm/dd/yyyy format. This is the date that the client’s information will be available to outside providers.
   Enter the End Date for the ROI in mm/dd/yyyy format. The End Date should be one (1) year from the Start Date. After this date providers will not longer be able to view the client’s data.
   Choose the type of ROI consent from the Documentation pick list.
   If there was a witness to the client’s consent to the ROI, then enter that person’s name in the Witness text field.

5. Click Save Release of Information. The window will refresh to the Release of Information screen. The new ROI will be listed.

![Release Of Information](image)

6. **To Edit an ROI:** Click the Edit icon (pencil). The screen will refresh and display the client’s ROI data. Make the desired changes. Click Save Release Information. The screen will refresh and display the Release of Information screen.

7. **To Delete an ROI:** Click the Red X Icon. A warning window will display asking the following, “Are you sure you want to delete this release of info?” Click Yes to continue. The Release of Information window will refresh and the ROI will no longer be listed.

8. Click Exit to return to the previous screen.
Household Sharing

1. In the Household Sharing section of the ShelterPoint screen, click on Add Household Data.

2. The Household Members screen will display. The questions in this section contain elements required by HUD that could pertain to all members of a household. They are grouped so that after a household is created the questions can be answered one time then applied equally to all members in a given household. Only answer questions that apply to every member of the household.

If there is no secondary race, enter the primary race.
Client Assessment

1. In the Client Assessment section, complete the questions for the client. The Universal Data Elements that are required by HUD are included in this assessment. Complete all fields on this screen.

You must enter a Disability Type if you answered Yes to the client having a disability of long duration.
2. After completing the questions for the client you entered, go to each of the client’s household member's records and complete all information for each member of the household. Children’s information won’t always have a SSN available, but you must enter a Date of Birth, otherwise the child will be treated as a single adult on reports. SPECIAL NOTE: If you don’t know the child’s exact birthdate, use the first day of the year for the child’s age (i.e. If this is 2011 and the child is 8 years old, their birthdate is 1/1/2003).

3. Click **Save & Exit** to save the Entry/Exit Assessment.

**SPECIAL NOTE:** Customized Assessments are available if your agency needs to collect additional information on your clients. Contact Info Line if you want to use one of the additional standard assessments or wish to customize a unique assessment.
Back-dating Mode

Back-dating mode should be used whenever you are entering client information in a Client Assessment for a date prior to the current date. Back-dating mode should be turned on AFTER you pull up the client record and BEFORE you enter any data for the client.

Turning on Back-date mode:

1. Open the client assessment by selecting the Assessment tab (1) on the Client Profile screen.

2. Click Back Date (2) in the upper right of your screen.

3. A window displays stating the following:

4. Enter the date in MM/DD/YYYY format or use one of the three date buttons (3).

5. Click Set Back Date. The Assessment screen will refresh and the section heading will turn Yellow. The back date that was set, will now appear to the right of the Back Date link.
6. Once you have completed the data entry, click the **blue date link** (1) to return to normal mode.

**IMPORTANT NOTE:** If you are entering or changing information to a client’s assessment by going to the Entry/Exit screen, you do not have to back date.

**Deleting Clients**

It is **not** a good idea to delete a client record from ServicePoint. You should only need to delete a record if the client has requested not to be in the database or an error has been made.

If you would like to delete a client from ServicePoint, send an email to Mary Jane Benko (**mibenko@infolineinc.org**) or Fred Berry (**fberry@infolineinc.org**) with the client information that you want deleted.
Exiting a Client

It is important to remember to exit a client out of the program once they have completed the program or left voluntarily. To do this:

1. Navigate to ShelterPoint. Select the provider and unit list (formerly called a bed list) from which the client is leaving.

2. Click on Check Client In (1).

3. Click on the Red Minus (2) sign on the left to exit the client. The screen on the following page will display.
4. Complete all fields on the check out screen and click on the **Save & Exit** button when finished.

- **Select the appropriate answers for the Reason For Leaving, and Destination fields.**
- **Select the Household members to be checked out of the bed list.**
- **Update the check out date and time.**
To Check Out Multiple Clients:

1. Navigate to ShelterPoint. Select the provider and unit list (formerly called a bed list) from which the client is leaving.

2. Click on Transmit Today’s Checkout List. The following screen will display.

3. To exit a client, click on the checkbox to the left of the client’s name.

4. Update the check out date and time.

5. Select the appropriate answers from the Reason For Leaving and Destination fields.

6. Click the Check Out button to check out the clients.
Recap of Important Policies

- **Data Access**
  Since no ServicePoint data is stored on the local computer the physical vulnerability of agency computers does not constitute a significant threat to client confidentiality. However, any user access data, such as a password, that is stored on a computer or in a written file, does constitute a risk to client confidentiality.

- **Unattended Active Sessions**
  Users who have logged on to HMIS and have an active session should never leave their computer terminal unattended. The system does have an automatic log off feature (after 10 minutes). If you are leaving your terminal for any period of time the user should logoff the active HMIS session.

- **Downloaded Data**
  Users who have been granted access to Report Writer/Query Function have the ability to download and save client level data onto their local computer. All client records containing identifying information that are stored within the participating agency’s local computers are the responsibility of the participating agency. A participating agency should develop protocol regarding the handling and protection of data downloaded.

- **Data Disposal**
  The Participating Agency agrees to dispose of documents that contain identifiable client level data by shredding paper records, deleting any information from diskette before disposal, and deleting any copies of client level data from the hard drive of any machine before transfer or disposal of property.

  The Participating Agencies must establish internal access to data protocols. These policies should include who has access, for what purpose, and how they can transmit this information. Issues to be addressed include storage, transmission and disposal of data.

  - Printed versions of confidential data should not be copied or left unattended and open to unauthorized access.
  - Media containing client-identified data will not be shared with any agency other than the owner of the data for any reason. Authorized employees using methods deemed appropriate by the participating agency may transport HMIS data that meet the above standard. Reasonable care should be used, and media should be secured when left unattended.
  - Magnetic media containing HMIS data that is released and/or disposed of from the Participating Agency and Central Server should first be processed to destroy any data residing on that media.
  - Formatting and overwriting are acceptable methods of destroying data.
  - Responsible personnel must authorize the shipping and receiving of magnetic media, and appropriate records must be maintained.
  - HMIS information in hardcopy format should be disposed of properly. This may include shredding finely enough to ensure that the information is unrecoverable.

**Agency Specific Process discussion:**

- **Is the person who interviews each client also responsible for the data entry of that information into HMIS? If not, how will you handle missing information?**

- **Are there any questions that may be difficult to ask the client, what will you do to collect that data?**

- **What happens to the client’s paper trail, signed consent forms, etc.?**

- **Who is responsible for client requests of HMIS records? What will your procedure be?**