GUIDE FOR RECORDING A MULTI-PERSON HOUSEHOLD ENTRY INTO SERVICEPOINT™

Version 2.0

Guide for Recording a Multi-Person Household Entry into ServicePoint™

Service Provider Type: ALL
Entry Type: Multi-Person Household

OVERVIEW:

This guide is designed to assist users of the ServicePoint software in **entering multi-person household data** into ServicePoint. This workflow should be used whenever two or more persons are present for services and will be assisted or enrolled as a single unit. There are various types of households: **Single Parent, Couple with No Children**, **Couple with children** etc. A **Household** will always include a **Head of Household (HOH)** and at least one other household member who are entering the program together.

INSTRUCTIONS:

Step 1: Log into **ServicePoint**, https://sp.lsndc.org .

Step 2: Select the ***Enter Data As*** option in the top right corner of the page [Figure 1].

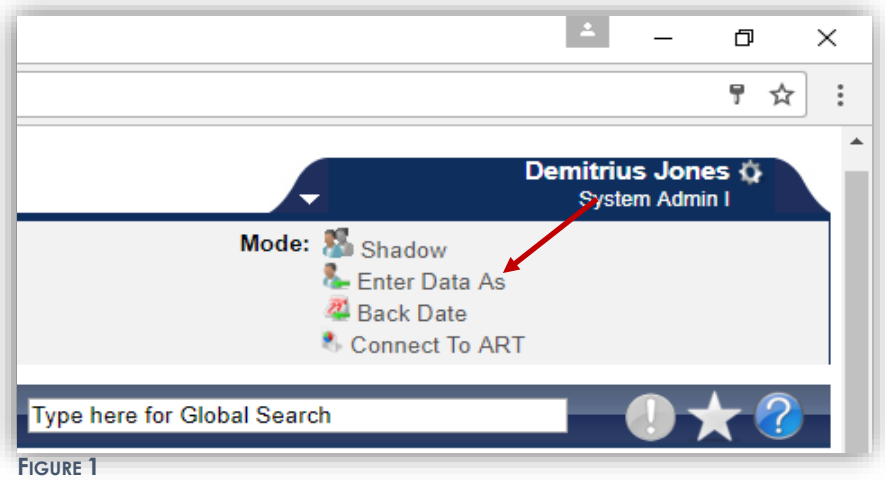


FIGURE 1

The **Enter Data As Provider Search** pop-up window will appear. Use the **Provider Search Bar** or **Provider ID # Bar** to search for your particular provider. There is also the option to scroll through the **Provider Search Results** until the appropriate provider is identified [Figure 2].

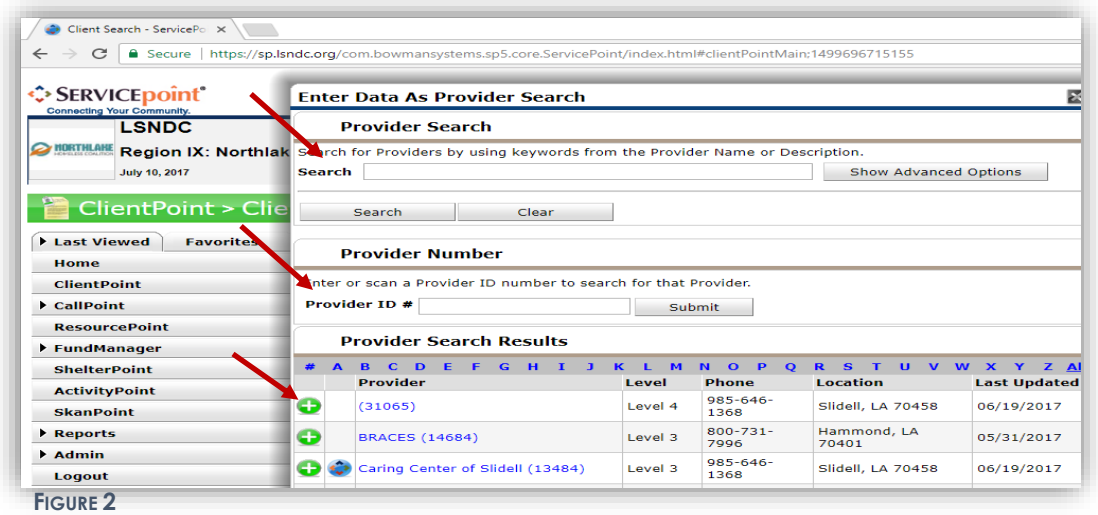


FIGURE 2

Click the green plus icon  next to the provider to select it. The screen will return to the *Dashboard Homepage*. The homepage will now display the selected provider next to the **"Enter Data As"** option [Figure 3].

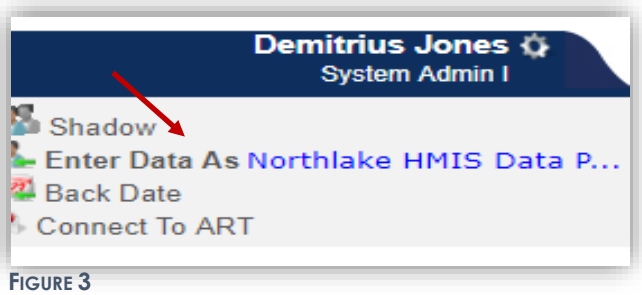


FIGURE 3

Step 3: From the *Dashboard Homepage*, click on the **ClientPoint** menu item [Figure 4].

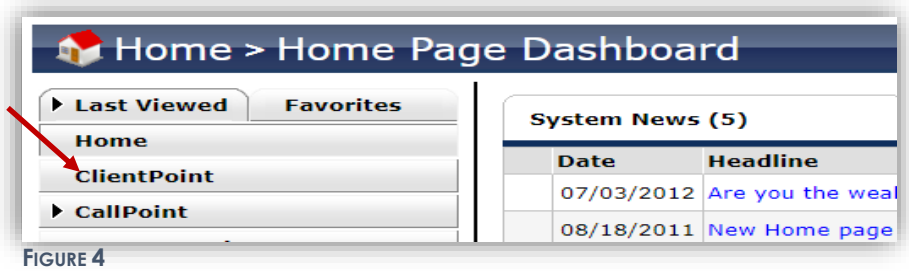


FIGURE 4

When recording data for a new household, always begin with the **Head of Household (HoH)**. Under the **Client Search** section, type the applicant's *First* and *Last Names* and/or *Social Security Number,* and click on the **Search** button to see if a client record already exists in the system [Figure 5].

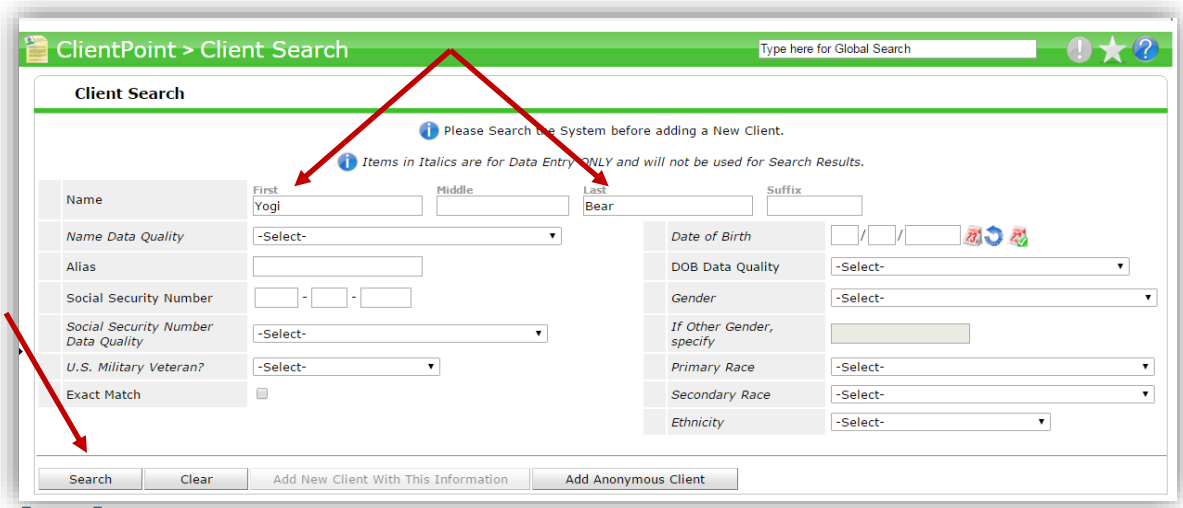


FIGURE 5

Alternately, if the Client ID number is known, under the **Client Number** section, type in the **Client ID #** and click on the **Submit** button [Figure 6].

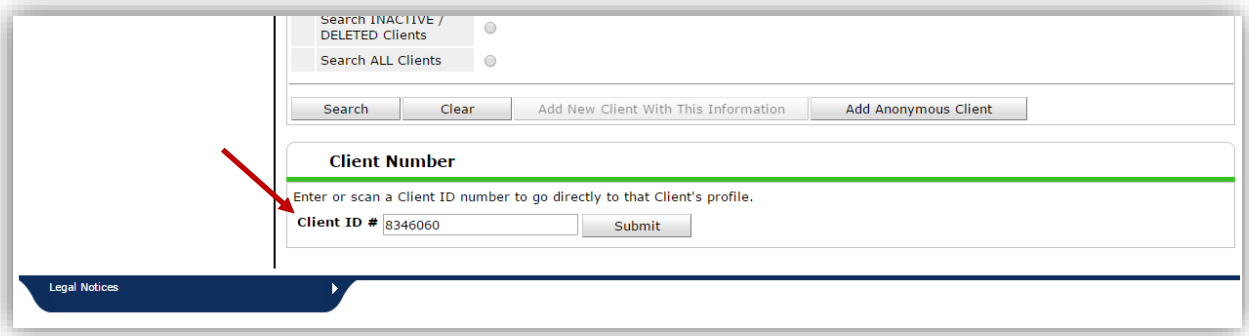


FIGURE 6

If the client record was searched using name or SSN, under the **Client Results** section, select the correct client record by clicking on the *yellow pencil icon* or the *linked name* [Figure 7].

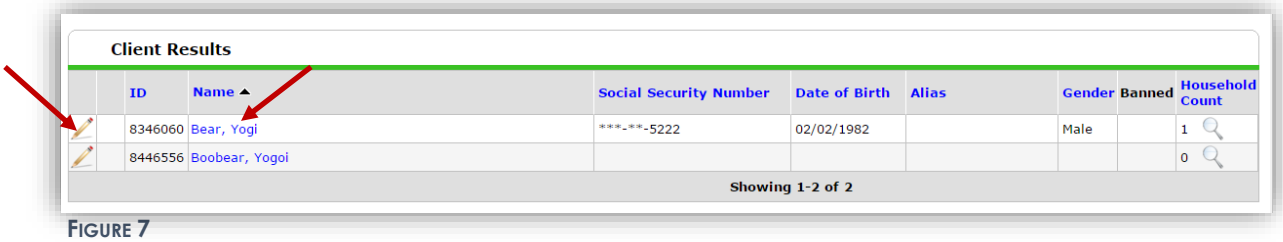


FIGURE 7

If the search results yield client records, be sure to match the name, date of birth, SSN, or client number to the **HOH** to ensure that the correct client is selected from the list. It is not unusual for clients with same/similar names to populate the search results. In some instances clients may already have information entered into the system by other service providers. It is the responsibility of the user to ensure that the information that was previously collected is still current and accurate by re-interviewing the client or matching the information to the most current responses given by the client, if data entry is not being completed in real time.

If client search DOES NOT yield a *Match* under the **Client Results** section [Figure 8], a new record will need to be created.

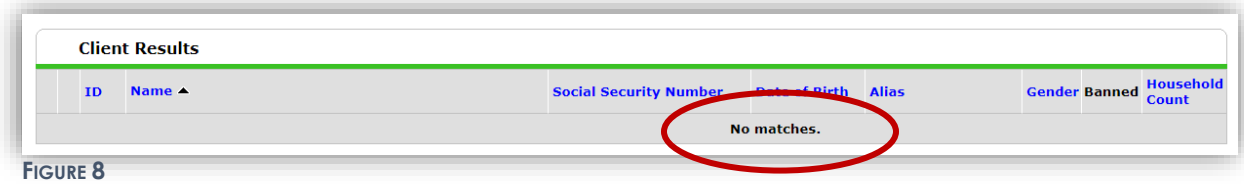


FIGURE 8

NOTE: If you are not recording the *Initial Contact* information in real time, you will need to use the ***Back Date*** feature. Click on the **Back Date** link in the upper right hand corner of the screen, and set the date to reflect the day the information was collected. Click on the **Set Back Date** button [Figure 9].

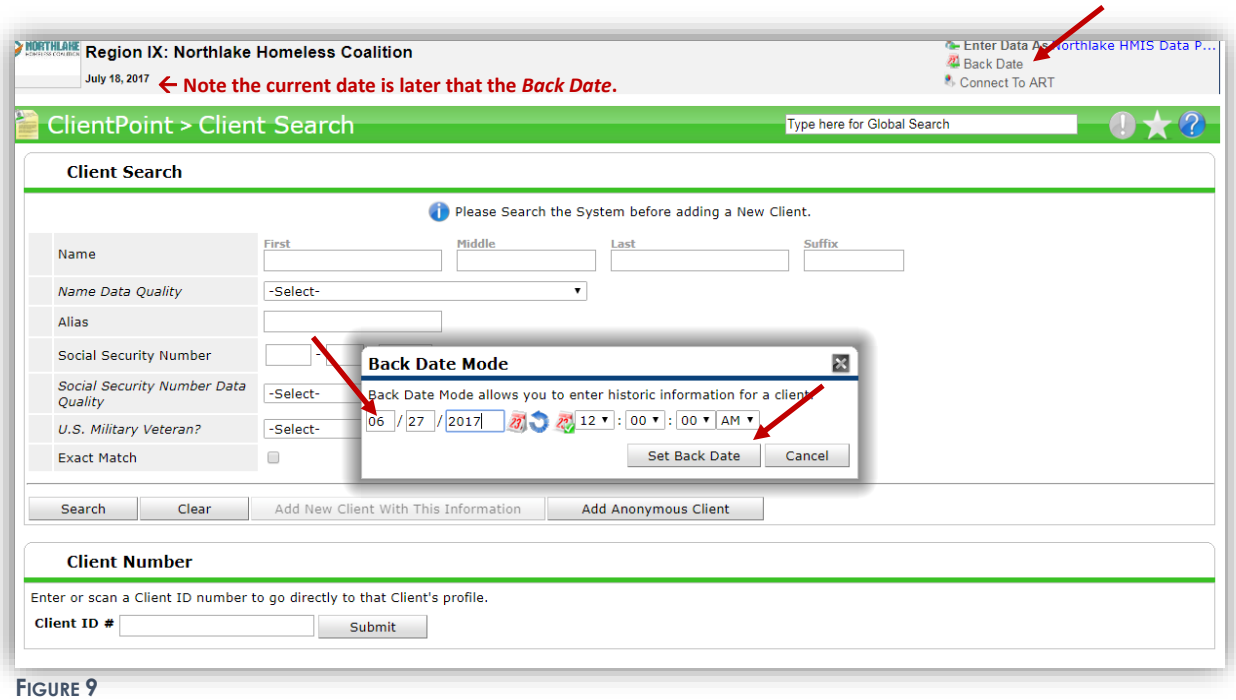


FIGURE 9

After selecting **Set Back Date**, the banner at the top of the screen will turn yellow.

STEP 4: Under the **Client Search** section, complete the remaining applicable fields. The following fields should be completed: (A) *First and Last Name*, (B) *Name Data Quality*, (C) *Date of Birth*, (D) *DOB Data Quality*, (E) *Social Security Number*, (F) *Social Security*

Number Data Quality, (G) *Gender*, (H) *U.S. Military Veteran?*, (I) *Primary Race {and Secondary Race, if applicable}*, and (J) *Ethnicity*. **Note:** Secondary race is optional and only needs to be recorded if the client self-reported a secondary race category response. Click on the **Add New Client With This Information** button [Figure 10].

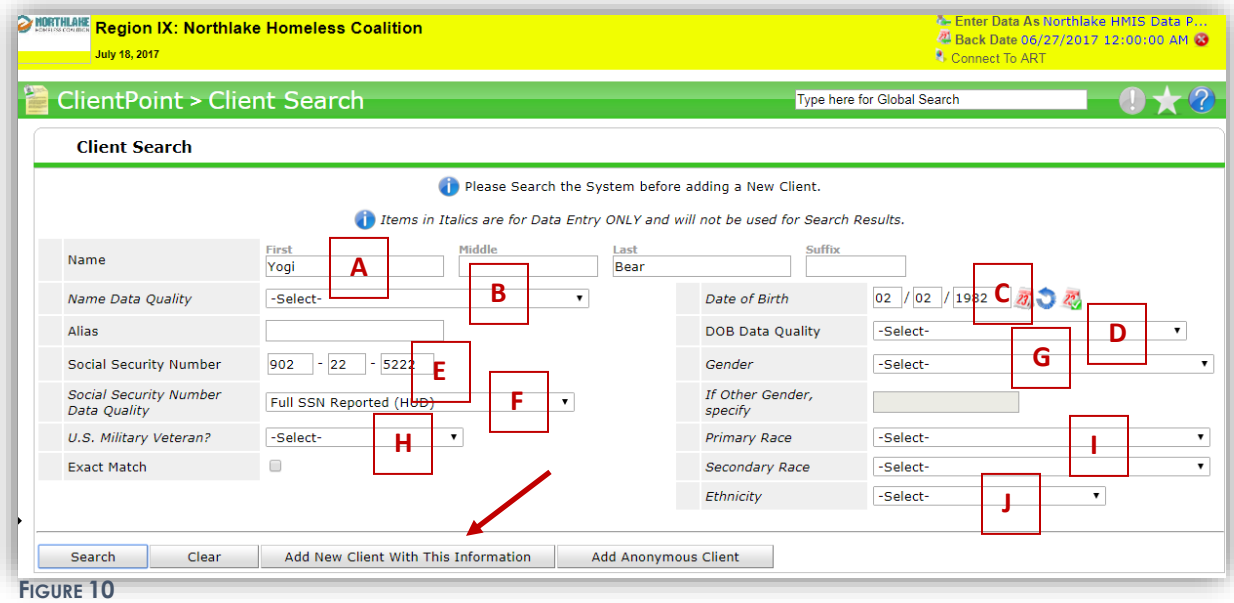


FIGURE 10

The following screen appears **Add New Client Information**. Select ***Add Client and Add New Household***. Click the **Ok** button. [Figure 11]

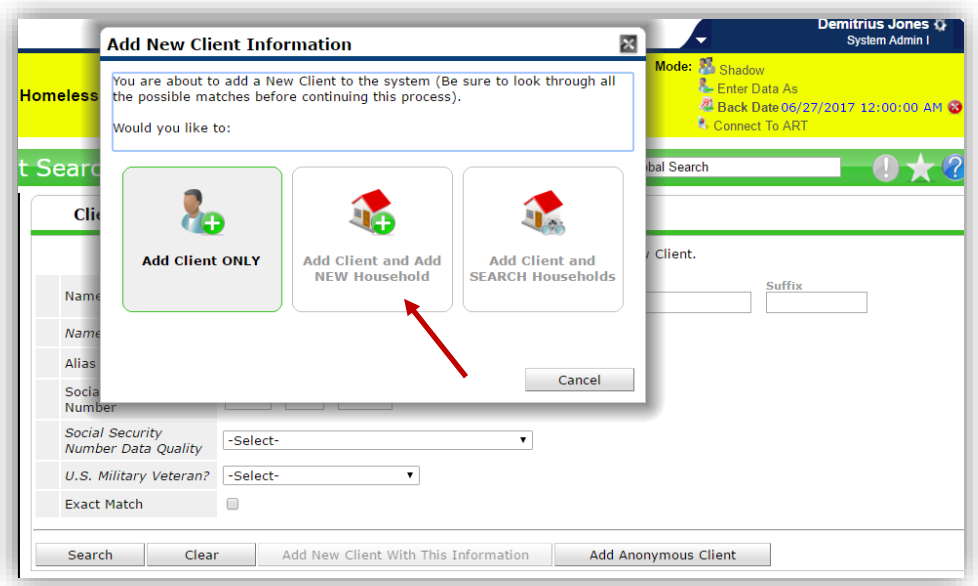


FIGURE 11

STEP5: The **Add New Household** pop-up window will appear. Click the dropdown list for **Household Type,** and choose the appropriate household type label from the options given. Under the Client Search section, type the additional household member's **First and Last Names [A] and**/or **Social Security Number [E]**, and click the **Search** button to see if a client record already exists in the system.

Note: The last name of the Head of Household will auto-populate the field and may need to be updated, if the additional household member has a different last name. [Figure 12]

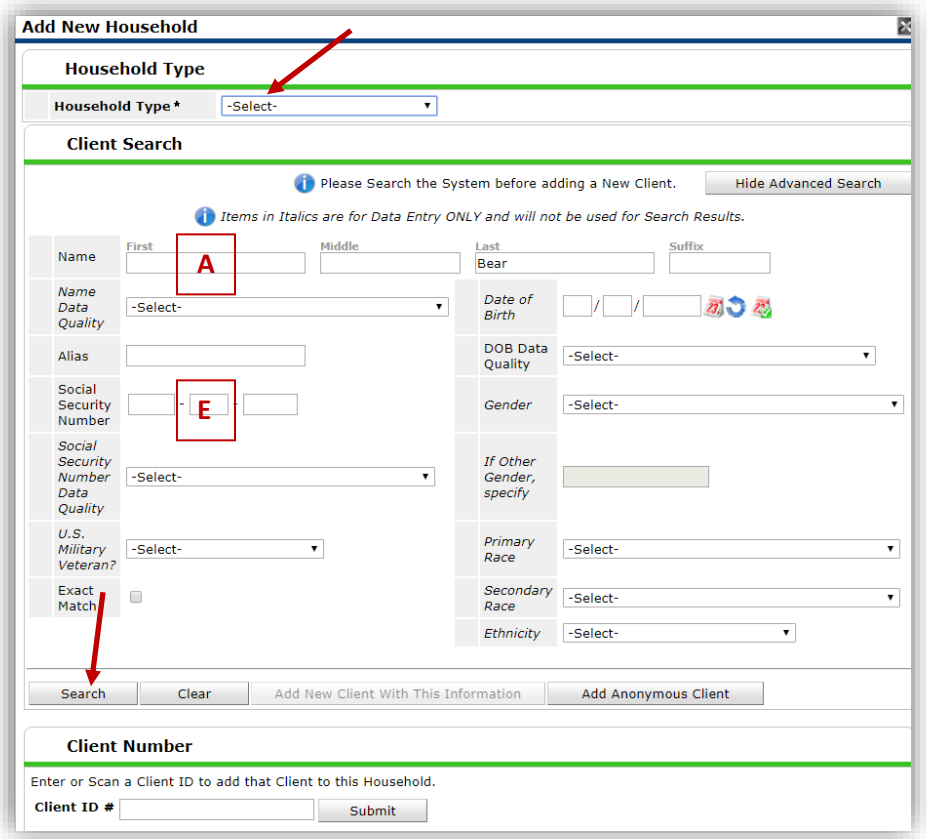


FIGURE 12

Alternately, if the Client ID number is known, under the **Client Number** section, type in the **Client ID #** and click on the **Submit** button [See Figure 6].

If the client record was searched using name or SSN, under the **Client Results** section, select the correct client record by clicking on the *yellow pencil icon* or the *linked name* [See Figure 7].

If the search results yield client records, be sure to match the name, date of birth, SSN, or client number to the **Additional Household Member** to ensure that the correct client is selected from the list. It is not unusual for clients with same/similar names to populate the search results. In some instances clients may already have information entered into the system by other service providers. It is the responsibility of the user to ensure that the

information that was previously collected is still current and accurate by re-interviewing the client or matching the information to the most current responses given by the client, if data entry is not being completed in real time.

If client search DOES NOT yield a *Match* under the **Client Results** section [See Figure 8], a new record will need to be created. Under the **Client Search** section, complete the remaining applicable fields. The following fields should be completed: (A) *First and Last Name*, (B) *Name Data Quality*, (C) *Social Security Number*, (D) *Social Security Number Data Quality*, (E) *U.S. Military Veteran?* **Note:** Secondary race is optional and only needs to be recorded if the client self-reported a secondary race category response. Click on the **Add New Client With This Information** button [Figure 13].

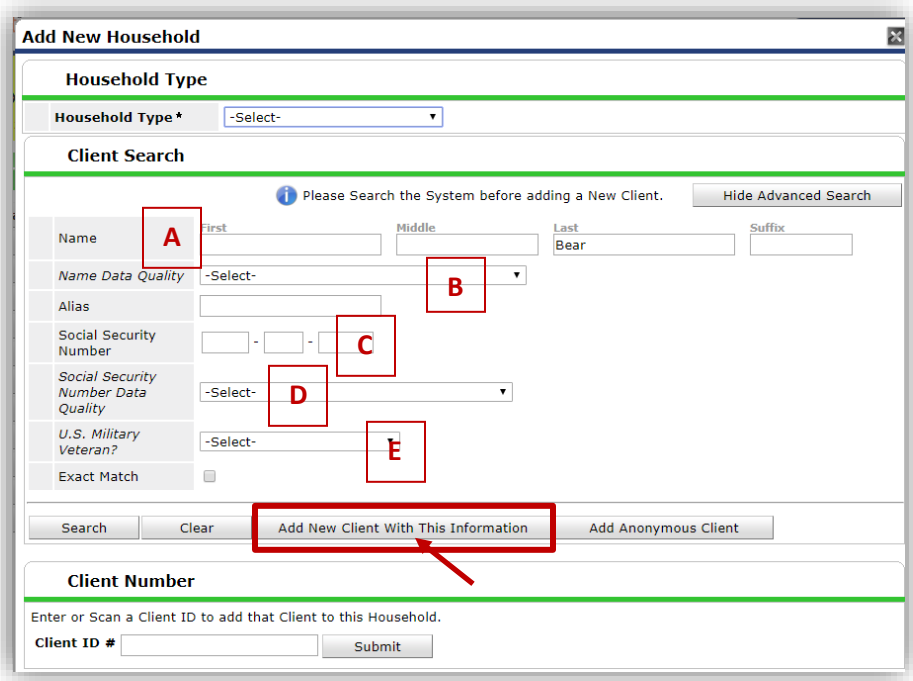


FIGURE 13

The following screen will appear: **Add New Client Information.** [Figure 13A]

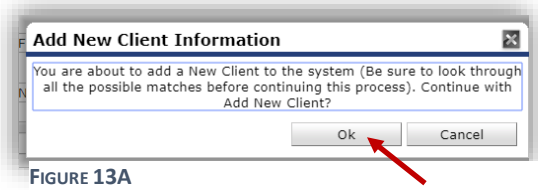


FIGURE 13A

Since there are no matches in the **Client Results** section, click **Ok**

You will now see the additional household member in the Selected Clients section at the bottom of the screen. Click the **Continue** button [Figure 14].

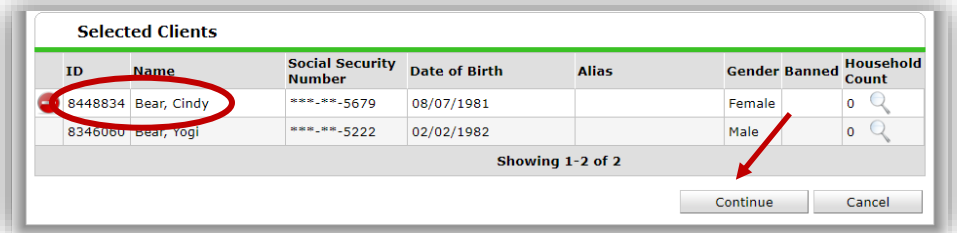


FIGURE 14

Repeat this process for any additional persons in the household who need to be included with the Project Entry.

STEP 6: Once all household members have been added to the household, apply the appropriate labels for defining the household member's (s') relationships to the Head of Household; a response for the **Head of Household** and **Relationship to Head of Household** dropdown lists must be selected for each household member. Ensure that the date under the **Joined Household** column reflects the date in which the clients joined the household. Once all information has been entered, click **Save & Exit** button [Figure 15].

Example: Yogi Bear has been identified as the **Head of Household**; thus, the "**Yes**" response is selected from the **Head of Household** dropdown list, and the "**Self**" response is selected from the **Relationship to Head of Household** dropdown list.

BooBoo Bear has NOT been identified as the **Head of Household**; thus, the "**No**" response is selected from the **Head of Household** dropdown list, and the "**Son**" response is selected from the **Relationship to Head of Household** dropdown list.

Cindy Bear has NOT been identified as the **Head of Household**; thus, the "**No**" response is selected from the **Head of Household** dropdown list and the "**Wife**" response is selected from the **Relationship to Head of Household** dropdown list. [Figure 15]

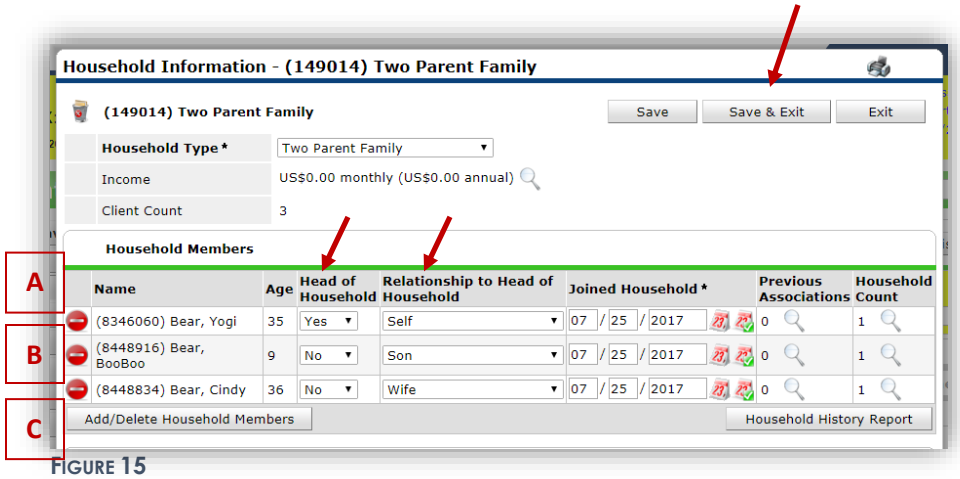


FIGURE 15

The screen will return to the **Households** tab under Client Profile.

Step 7: Select the **ROI** tab to the right of **Households,** and click the **Add Release of Information button**. [Figure 16].

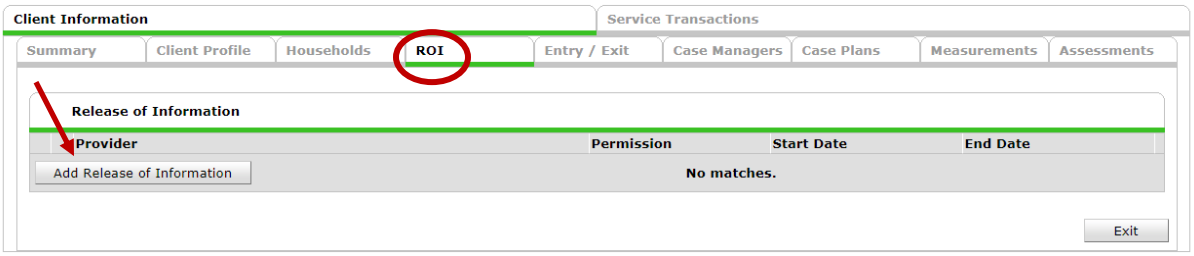


FIGURE 16

The **Release of Information Data** pop-up window will appear. Click the check box next to the Household Type to select all household members at once. The provider should already be preselected at this point; however, if there is no provider, or if the selected provider is not the appropriate one, use the search button to the right to locate and select the right provider.

For the Release Granted option (must be entered in order to proceed), select **Yes** or **No** in the dropdown list [A]. Next, record the **Start Date** and the **End Date** for the client. The "**Start Date"** reflects the day the data was collected, and the "**End Date"** reflects the appropriate time frame stated in the paper ROI. The End Date is three years following the start date for all projects, except for NHC CAAS-IND and NHC, CAAS-FAM.

Example: Start Date = 7/25/2017, End date = 7/25/2020

NOTE: While you are not required to record a response for the Documentation pulldown menu and identify the **Witness** who signed the paper **ROI**, it is a good practice.

Select **Save Release of Information** button to continue [Figure 17].

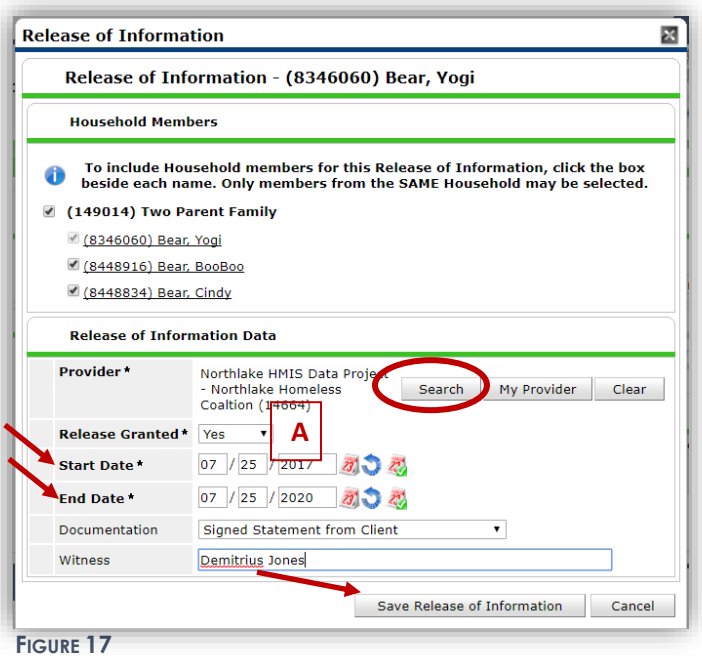


FIGURE 17

The screen will return to the ROI tab.

Step 8: Select the **Entry/Exit** tab to the right of the *ROI* tab**.** Click the **Add Entry/Exit** button at the bottom left side [Figure 18].

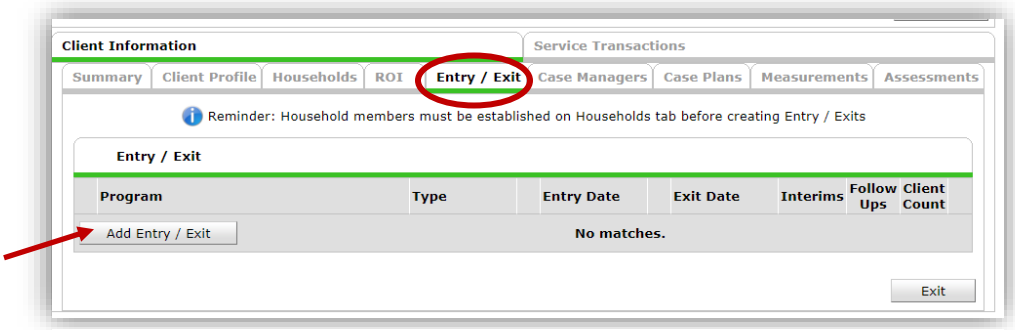


FIGURE 18

The **Entry Data** pop-up window will appear. Click the check box next to the Household Type to select all household members at once. The Service Provider name will auto-populate to the provider name you selected for *Enter Data As (EDA)*, where applicable**.** Select ***HUD*** from the **Entry Type** pull-down menu.

Make sure the **Entry Date** reflects the correct date of assessment, and set the time to 8:00 AM. If you are in **Back Date** mode, the **Entry Date** will reflect the date that you previously selected (i.e. the date the data was collected). If the information is being entered the same day as the assessment it will reflect today's date by default.

Click the **Save & Continue** button [Figure 19].

FIGURE 19

The window will expand, and the Entry Assessment will appear, including a list of the household members. The client name highlighted in blue is the client record that is

currently open and editable. To toggle between client records of the other household members, click on a different client's name.

Step 8A: Scroll down to the section of the assessment labeled, **GENERAL CLIENT INFORMATION**. Responses recorded under the *Client Profile* tab should populate for the questions: *Date of Birth*, *Date of Birth Type*, *Primary Race* {and *Secondary Race*, if applicable}, Ethnicity, and Gender. Verify the accuracy of this information [Figure 20].

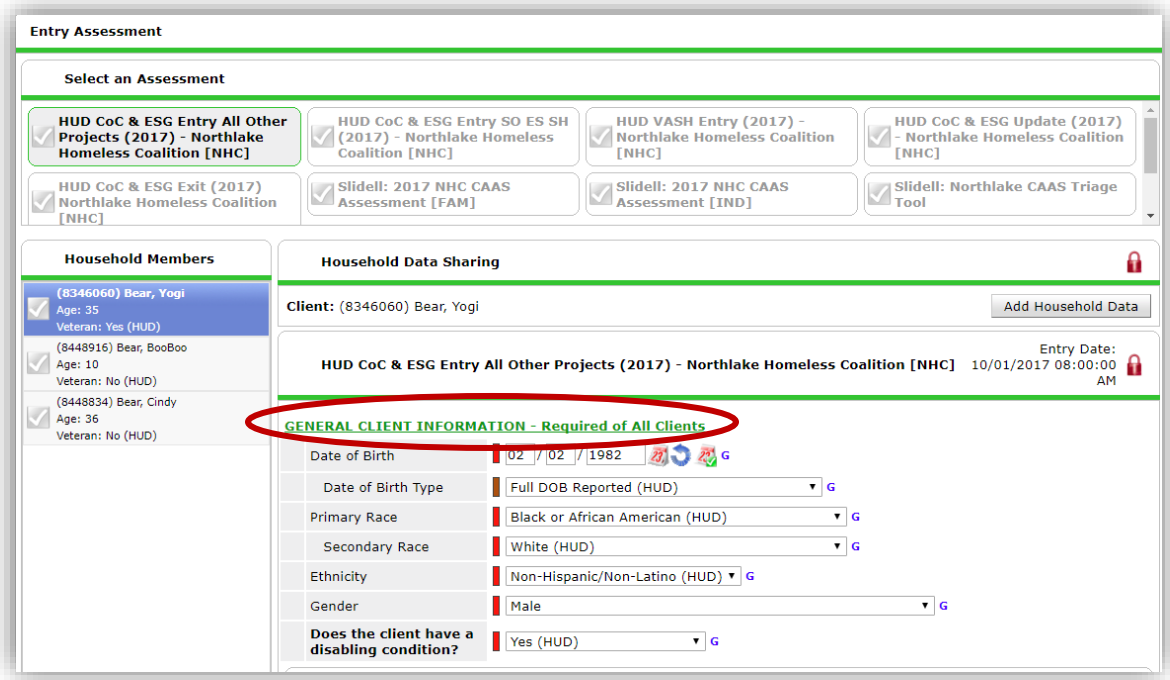


FIGURE 20

Scroll down to the question, ***Does the client have a disabling condition?***. Record the **"Yes"** or **"No"** response of the client [Figures 21& 22].

If client has self-identified as not having a disability, record a ***No*** response the question, and click on the link for **HUD Verification**. A pop-up window labeled **HUD Verification: Disabilities for MM/DD/YYY** will appear. Click on the **radio button** for No response for the function, "*Select the Disability determination value for all incomplete Disability Type records*". Click the **Save & Exit** button [Figure 21].

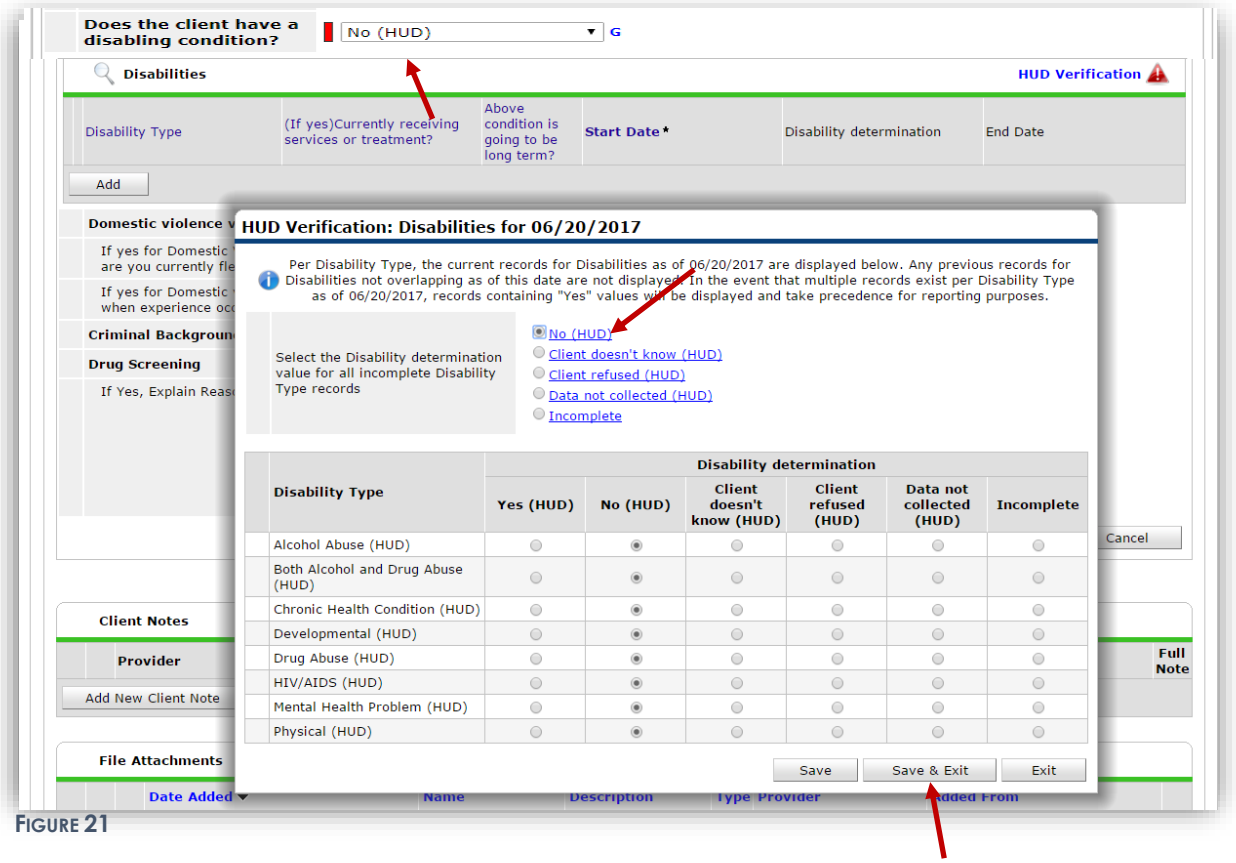


FIGURE 21

<u>If the client does self-identify as having a disabling condition</u>, record a ***Yes*** response the question, and click on the link for **HUD Verification**. To save time, click on the **radio button** for <u>*No*</u> response [A] for the function "*Select the Disability determination value for all incomplete Disability Type records*", <u>THEN</u> click on the **radio button** under the ***<u>Yes</u>*** column [B] for the appropriate disability type(s).

A pop-up window labeled **Disabilities** will appear. **Record responses** to the following questions: "*If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently*" and "*If Yes, Documentation of the disability and severity on file*". Click on the **Save** button [Figure 22].

Example: The client has self-identifed that he has a mental health problem that will be of long-duration, but he has not provided documentation that verifies the disability.

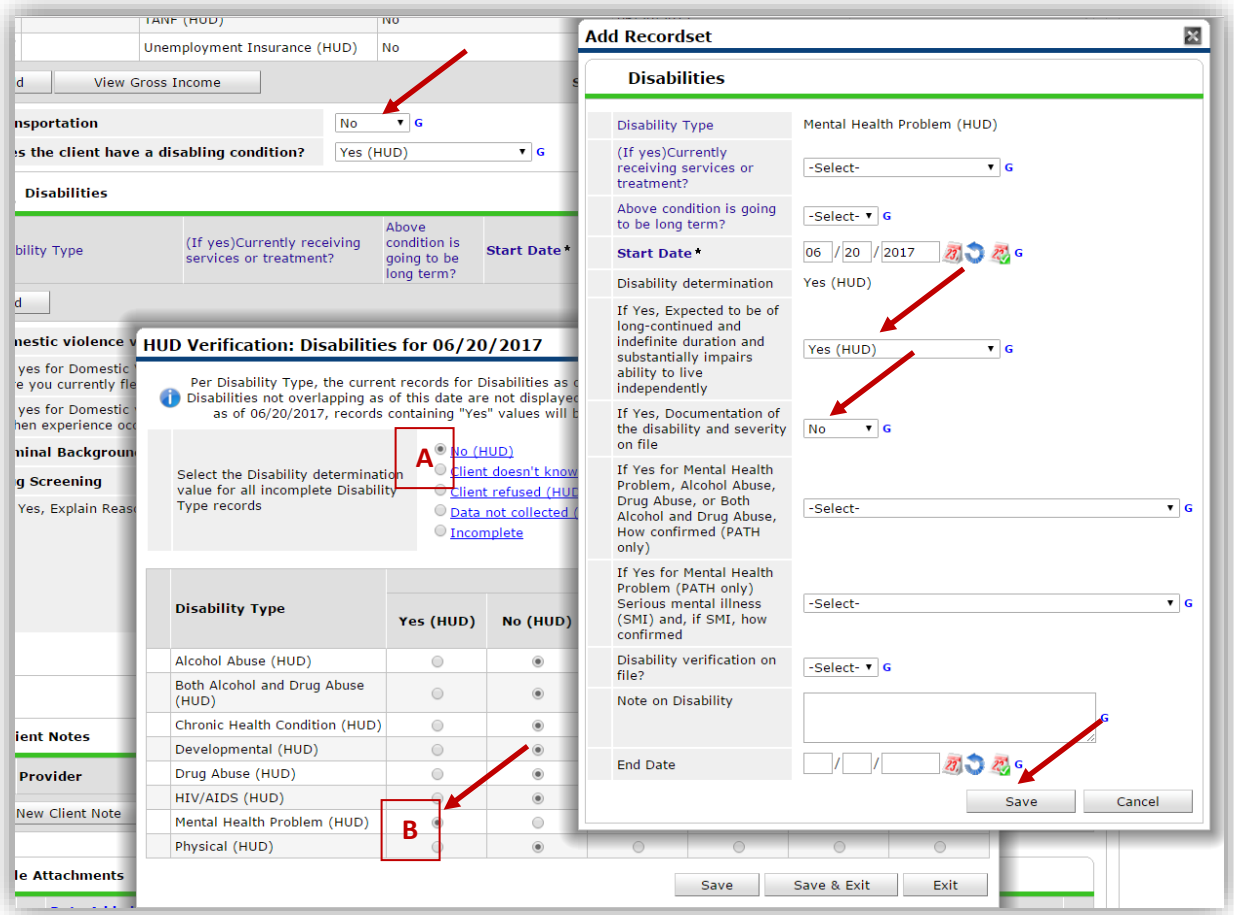


FIGURE 22

Click on the **Save & Exit** button to close the HUD Verification window for recording **Disabling Conditions** [Figure 23].

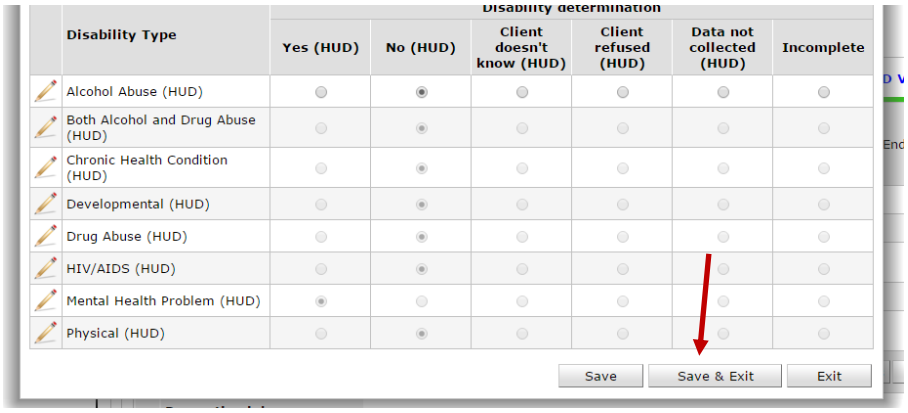


FIGURE 23

Note: *The* ***HUD Verification*** *link may initially be labeled with a red warning symbol,*

HUD Verification ⚠ *, as a visual cue to complete the verification process.*

Once completed, the label will change to a green check mark, **HUD Verification** ✅ .

STEP 8B: Scroll down to the section of the assessment labeled, **HEALTH INSURANCE INFORMATION**. Record the client's response for the question, **Covered by Health Insurance.** [Figures 24 & 25].

Click the link for **HUD Verification**. A pop-up window labeled **HUD Verification: Health Insurance for MM/DD/YYY** will appear that allows for specific information about health insurance to be recorded.

If client has self-identified as NOT having any health insurance, click on the **radio button** for No response for the function "*Select the Covered? value for all incomplete Health Insurance Type records*". Click the **Save & Exit** button [Figure 24].

If the client has self-identified as having health insurance, to save time, click on the **radio button** for No response [A] for the function "*Select the Covered? value for all incomplete Health Insurance Type records*", THEN click on the **radio button** under the ***Yes*** column [B] for the appropriate source(s) of non-cash benefits. Click on the **Save & Exit** button [Figure 25].

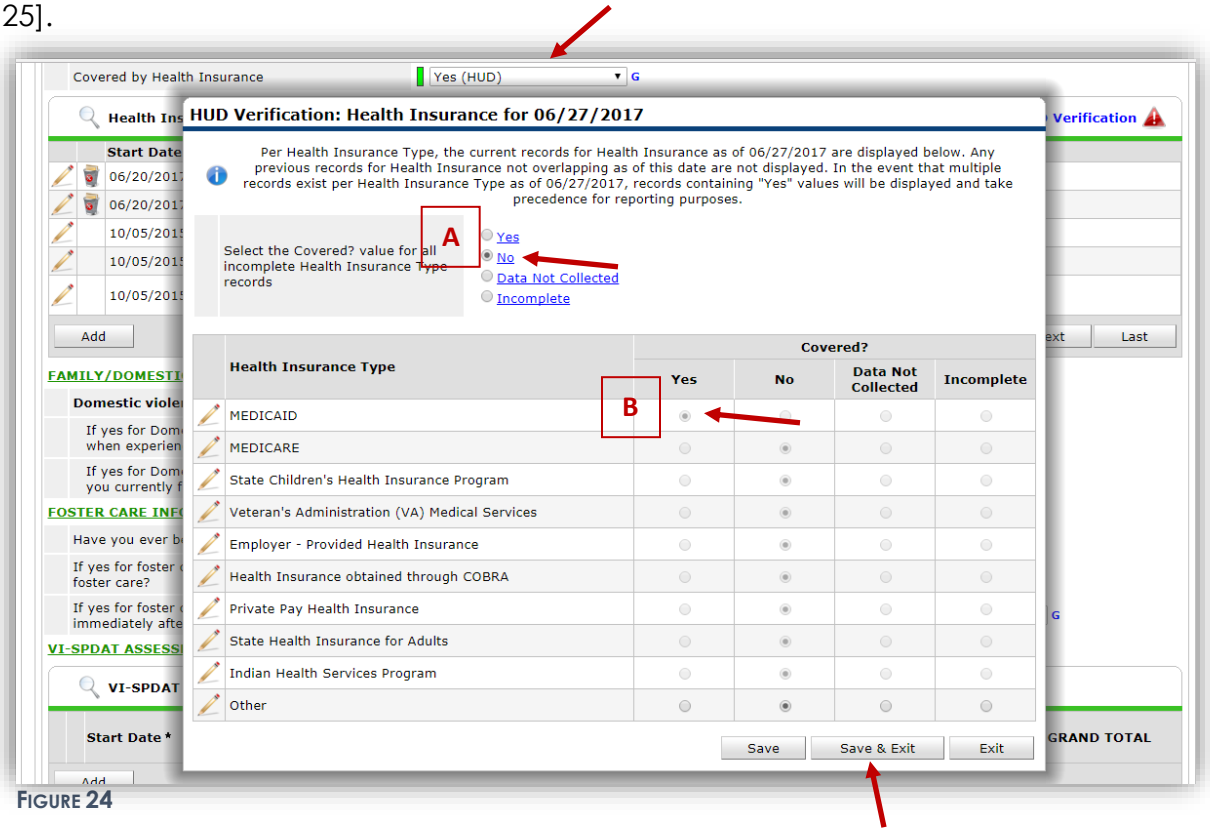


FIGURE 24

If the client has self-identified as having health insurance, to save time, click on the **radio button** for the No response [A] for the function "*Select the Covered? value for all incomplete Health Insurance Type records*", THEN click on the **radio button** under the ***Yes***

column [B] for the appropriate source(s) of non-cash benefits. Click on the **Save & Exit** button [Figure 25].

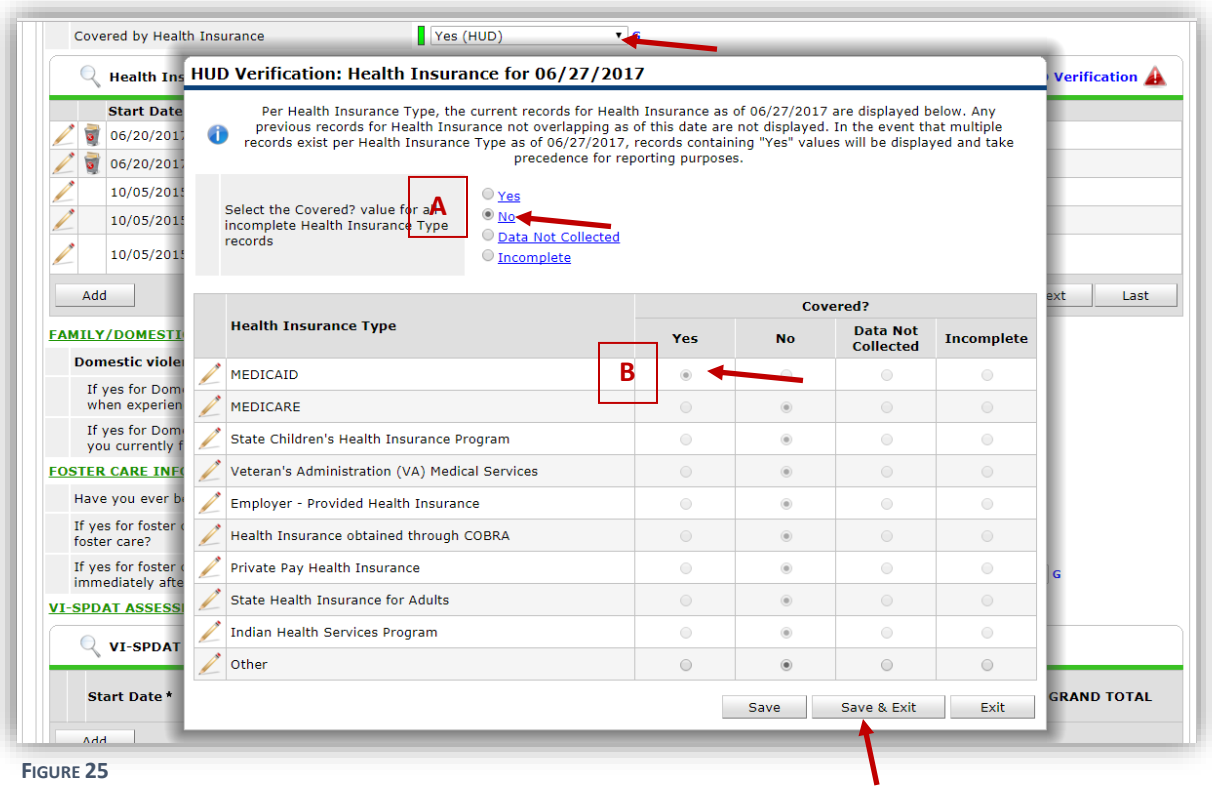


FIGURE 25

STEP 8C: Scroll down to the section of the assessment labeled, **HOUSING INFORMATION**. Complete the following fields [Figure 26].

Relationship to Head of Household is "Self (head of household)", and the response for **Client Location** is "LA-506" [Figure 26].

Parish Preference refers to the parish the client has identified as the preferred location for housing identification and placement, while **Parish** is the parish of current residence.

Residence Prior to Project Entry refers to the primary dwelling type/situation where the resident was residing in immediately prior to entry into the project.

Length of Stay in Previous Place refers to the length of time the client was residing in the previous place of residence.

Approximate date homelessness started refers to the date of the last time the client had a place to sleep that was not on the streets, in emergency shelter, or in a Safe Haven. This an approximation that must be recorded in the MM/DD/YYYY format.

Regardless of where they stayed last night - Number of times the client has been homeless on the streets, in ES, or SH in the past three years including today refers to the number of separate episodes a client has experienced living in one or more of these locations within the previous 3 years, wherein there were breaks in time when the client was not residing in one of these locations.

Total number of months homeless on the (street, in ES or SH) in the past three years refers to the number of months a client has been in one or more of these locations. This number must be cumulative, but not necessarily consecutive.

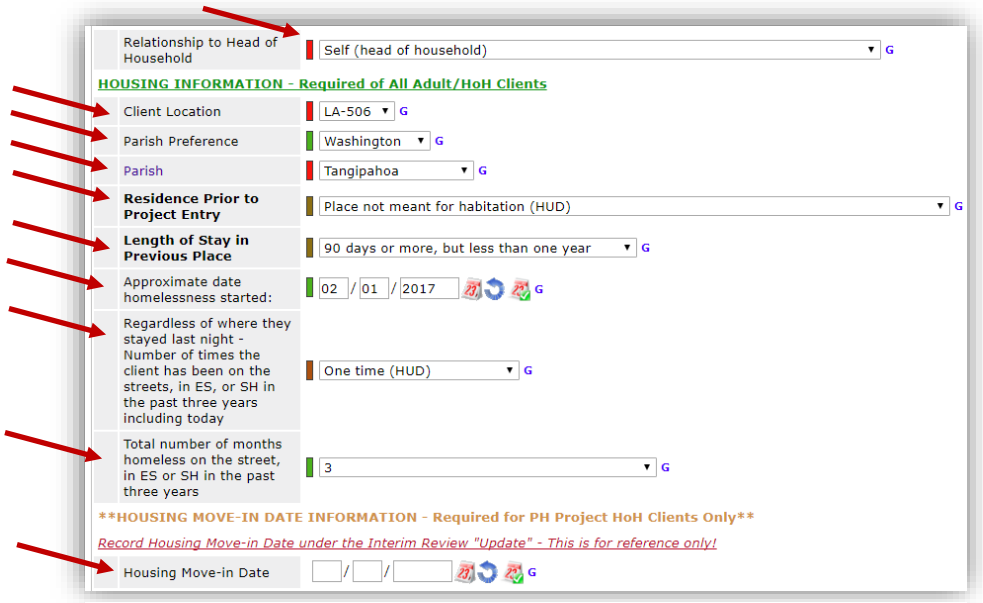


FIGURE 26

Projects providing Permanent Housing must record the **HOUSING MOVE-IN DATE.** This date should be recorded in the MM/DD/YYYY format **ONLY** after the client has entered housing [Figure 26A]. (See Page 21 for further instructions on completing an Interim Review)

Imprtant: Do not record Housing Move-in date in the Entry Assessment.

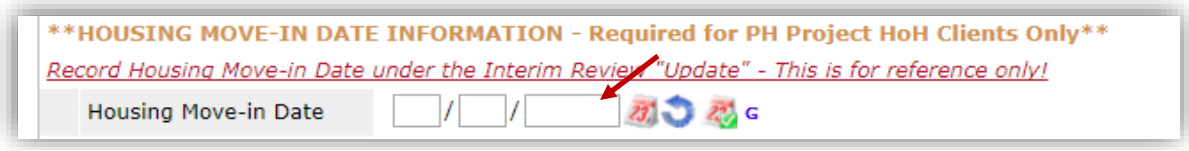


FIGURE 26A

STEP 8D: Scroll down to the section of the assessment labeled, **INCOME AND BENEFITS INFORMATION**. Record the client's response for the question, **Total Monthly Income**, and record whether the client has one or more sources of income at the time of project entry for the question, **Income from Any Source** [Figures 27 & 28]. If the client has no income, record "0" for *Total Monly Income*, and "No" for *Income from Any Source*.

Click the link for **HUD Verification**. A pop-up window labeled **HUD Verification: Monthly Income for MM/DD/YYY** will appear that allows for specific information about income sources to be recorded. If client has self-identified as NOT having any income, click on the **radio button** for No response for the function "*Select the Receiving Income Source? value for all incomplete Source of Income records*". Click the **Save & Exit** button [Figure 27].

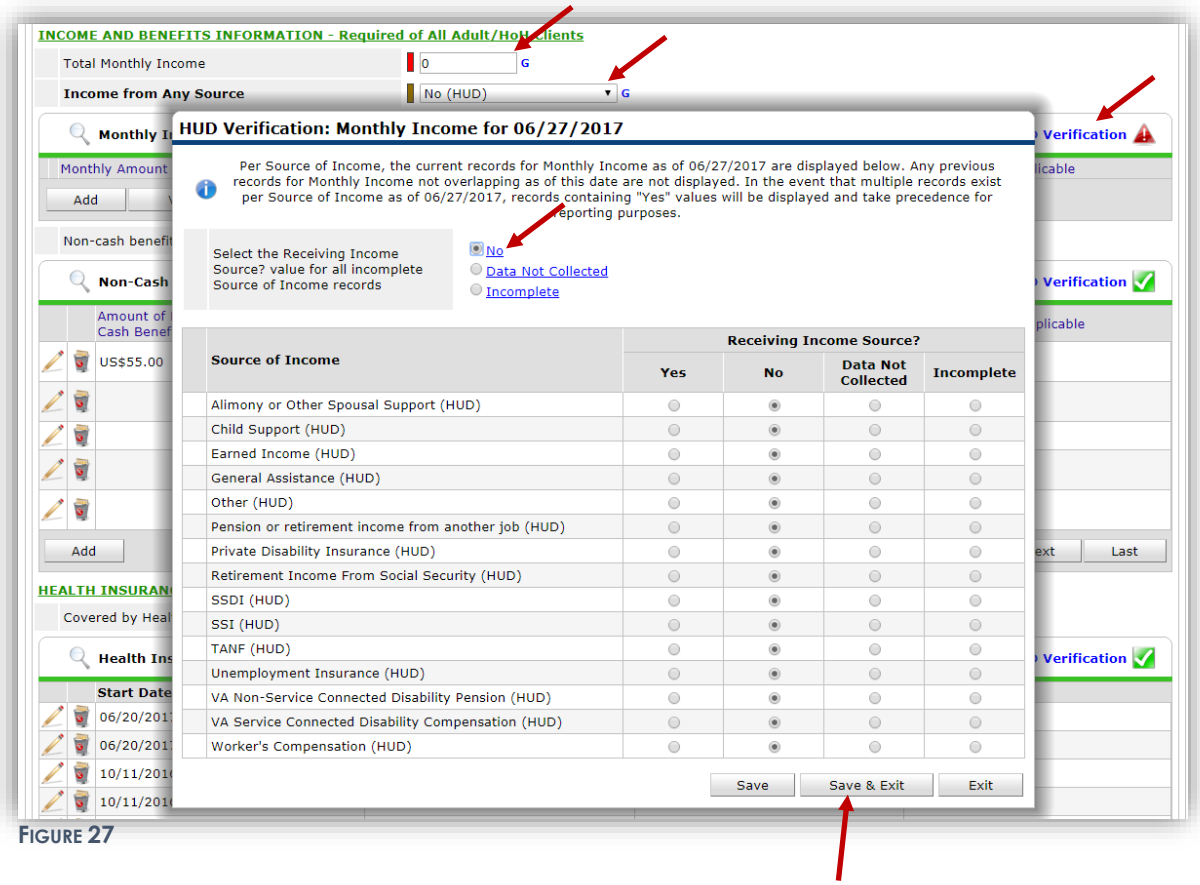


FIGURE 27

If the client has self-identified as having income , to save time, click on the **radio button** for No response [A] for the function "*Select the Receiving Income Source? value for all incomplete Source of Income records*", THEN click on the **radio button** under the ***Yes*** column [B] for the appropriate source(s) of income. A pop-up window labeled **Monthly Income** will appear; record the monthly amount, and click on the **Save** button [Figure 28].

Example: *The client has reported that he is receiving $500 per month in Alimony or Spousal Support.*

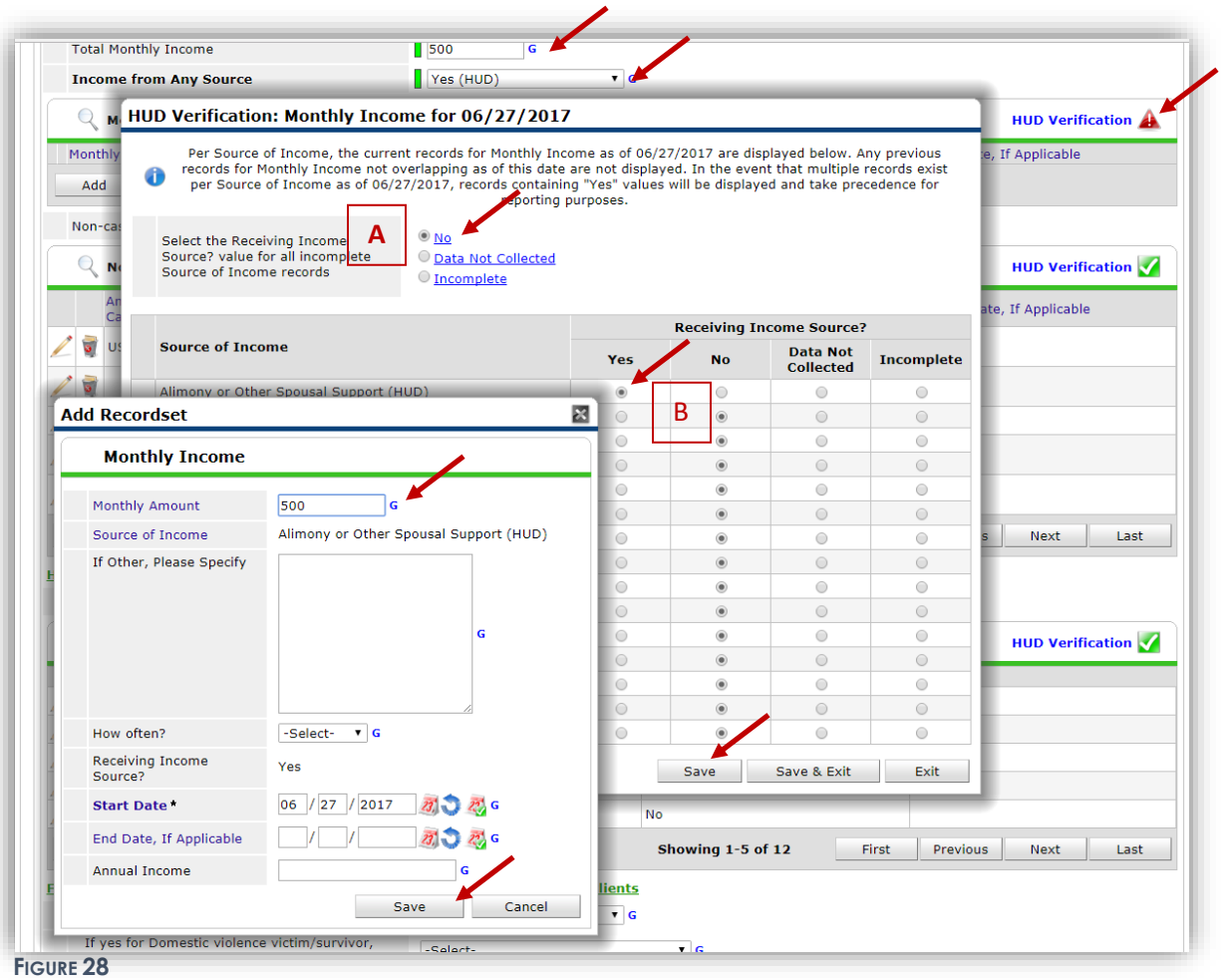


FIGURE 28

Click on the **Save & Exit** button to close the HUD Verification window for recording Income Sources [Figure 29].

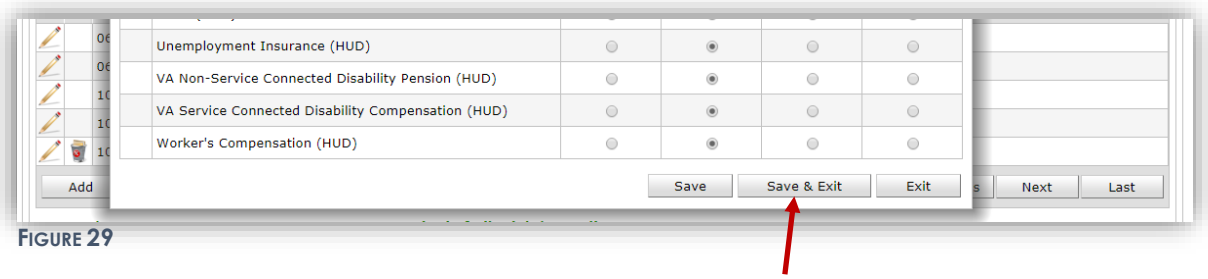


FIGURE 29

Scroll down to the non-cash benefits questions. Record whether the client has one or more sources of non-cash benefits at the time of project entry for the question, **Non-cash benefit from any source** [Figures 30 & 31].

Click the link for **HUD Verification**. A pop-up window labeled **HUD Verification: Non-Cash Benefits for MM/DD/YYY** will appear that allows for specific information about non-cash benefits sources to be recorded.

If client has self-identified as NOT having any non-cash benefits, click on the **radio button** for No response for the function "*Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefits records*". Click the **Save & Exit** button [Figure 29].

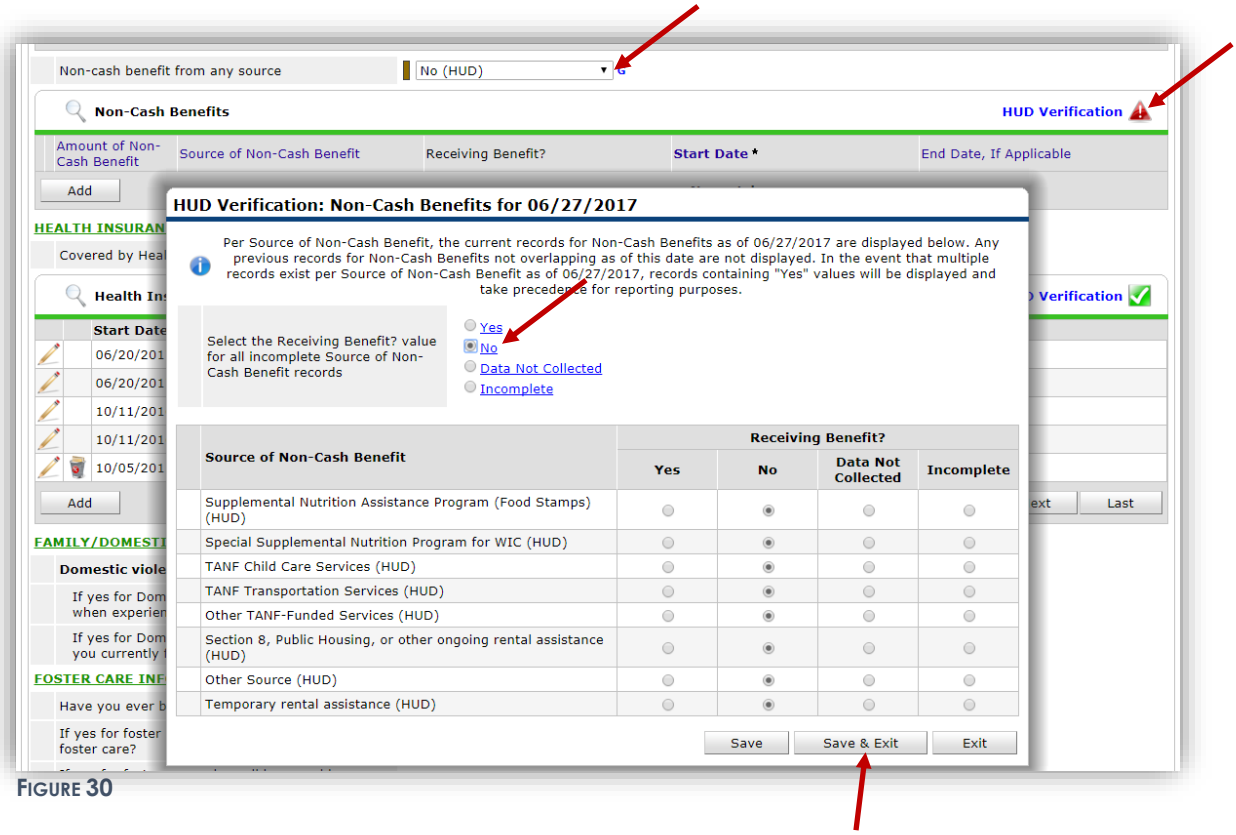


FIGURE 30

If the client has self-identified as having non-cash benefits, to save time, click on the **radio button** for No response [A] for the function "*Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefits records*", THEN click on the **radio button** under the ***Yes*** column [B] for the appropriate source(s) of non-cash benefits. Click on the **Save & Exit** button [Figure 31].

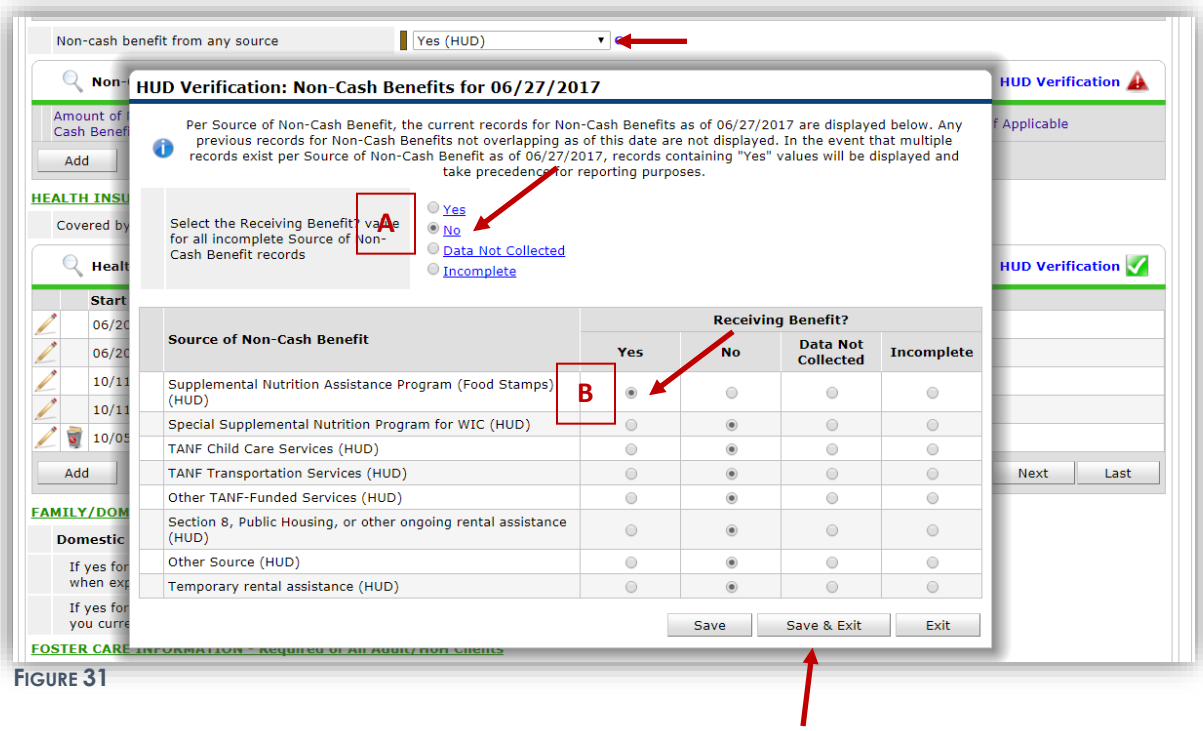


FIGURE 31

STEP 8E: Scroll down to the section of the assessment labeled, FAMILY / DOMESTIC VIOLENCE INFORMATION. Record the client's response for the question, **Domestic violence victim/survivor**.

If the client self-identifies as NOT having a history of family/domestic violence, record a "No" response to the question, and skip the follow-up questions, I**f yes, for Domestic violence victim/survivor, when experience occurred**, and **If yes for Domestic violence Victim/Survivor, are you currently fleeing?** [Figure 32].

If the client self-identifies as having a history of family/domestic violence, record a "Yes" response to the question, and record the client's responses for the follow-up questions, I**f yes, for Domestic violence victim/survivor, when experience occurred**, and **If yes for Domestic violence Victim/Survivor, are you currently fleeing?** [Figure 33].

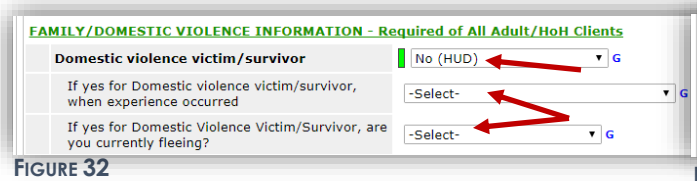


FIGURE 32

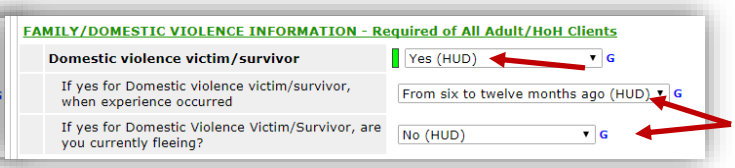


FIGURE 33

STEP 8F: Scroll down to the section of the assessment labeled, FOSTER CARE INFORMATION. Record the client's response for the question, **Have you ever been in foster care?**

If the client self-identifies as NOT having a history of foster care, record a "No" response to the question, and skip the follow-up questions, **If yes, for foster care, at what age did**

you exit foster care?, and **If yes for foster care, where did you reside immediately after exiting foster care?** [Figure 34].

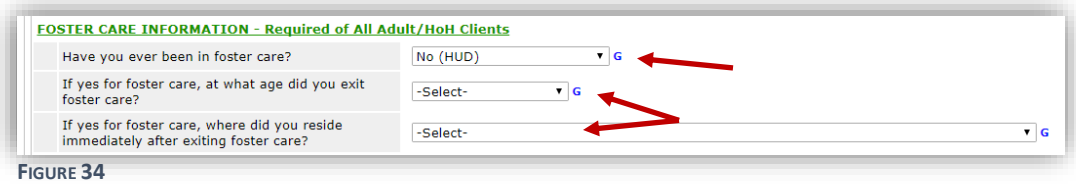


FIGURE 34

If the client self-identifies as having a history of foster care, record a "Yes" response to the question, and record the client's responses for the follow-up questions, **If yes, for foster care, at what age did you exit foster care?**, and **If yes for foster care, where did you reside immediately after exiting foster care?** [Figure 35].

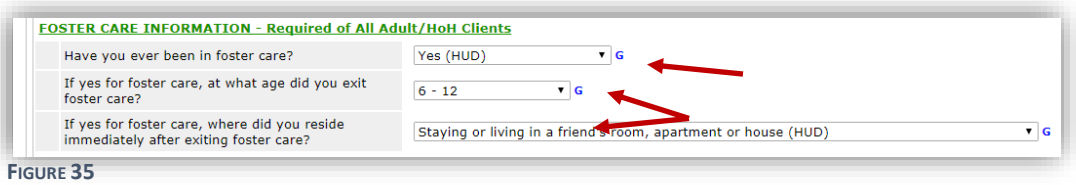


FIGURE 35

Projects providing **Street Outreach Assistance** must complete the sub-assessment, **Outreach, Date of Engagement and a VI-SPDAT v2.0**.

To record data from contact(s) with the client, click on the **Add** button of the sub-assessment. A pop-up window labeled **Outreach** will appear. Record the first **Date of Contact** outreach staff had with the client, in the MM/DD/YYYY format, the **Location** type, and the **Start Date**. The Start Date will reflect the date that you had previously selected (i.e. the date the data was collected), if you are in Backdate mode. If the information is being entered the same day as the assessment it will reflect today's date by default. Click on the **Save** button or **Save and Add Another** button, based upon whether there have been multiple dates of contact prior to the recording of data in the system [Figure 36].

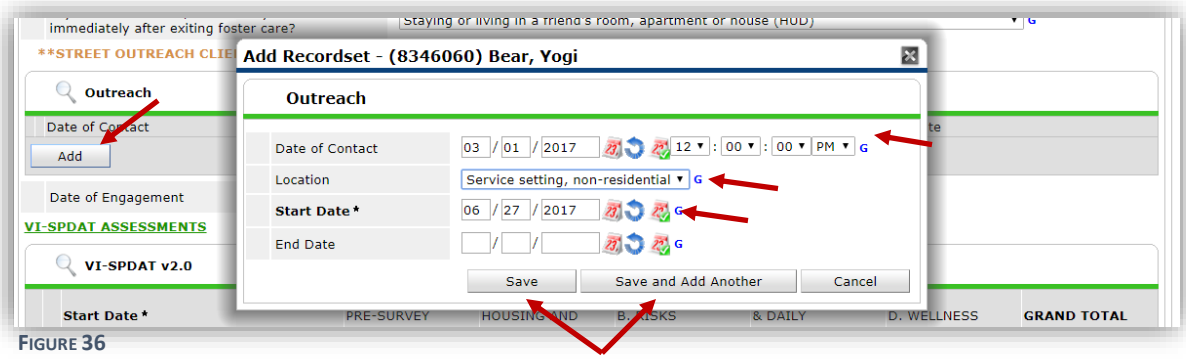


FIGURE 36

Record the **Date of Engagement** in MM/DD/YYYY format. This is the date when outreach staff completed a deliberate client assessment or began a case plan with the client; it should be on or after the Entry Date. [Figure 37].

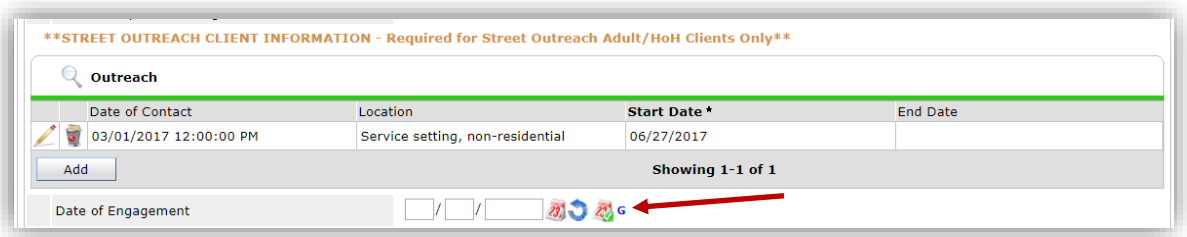


FIGURE 37

To record the **VI-FSPDAT v2.0** reponses, click on the **Add** button of the sub-assessment. A pop-up window labeled **VI-FSPDAT v2.0** will appear. Verify the *Start Date* of the assessment is accurate, and complete all fields for the 41 questions that comprise the assessment [Figure 38].

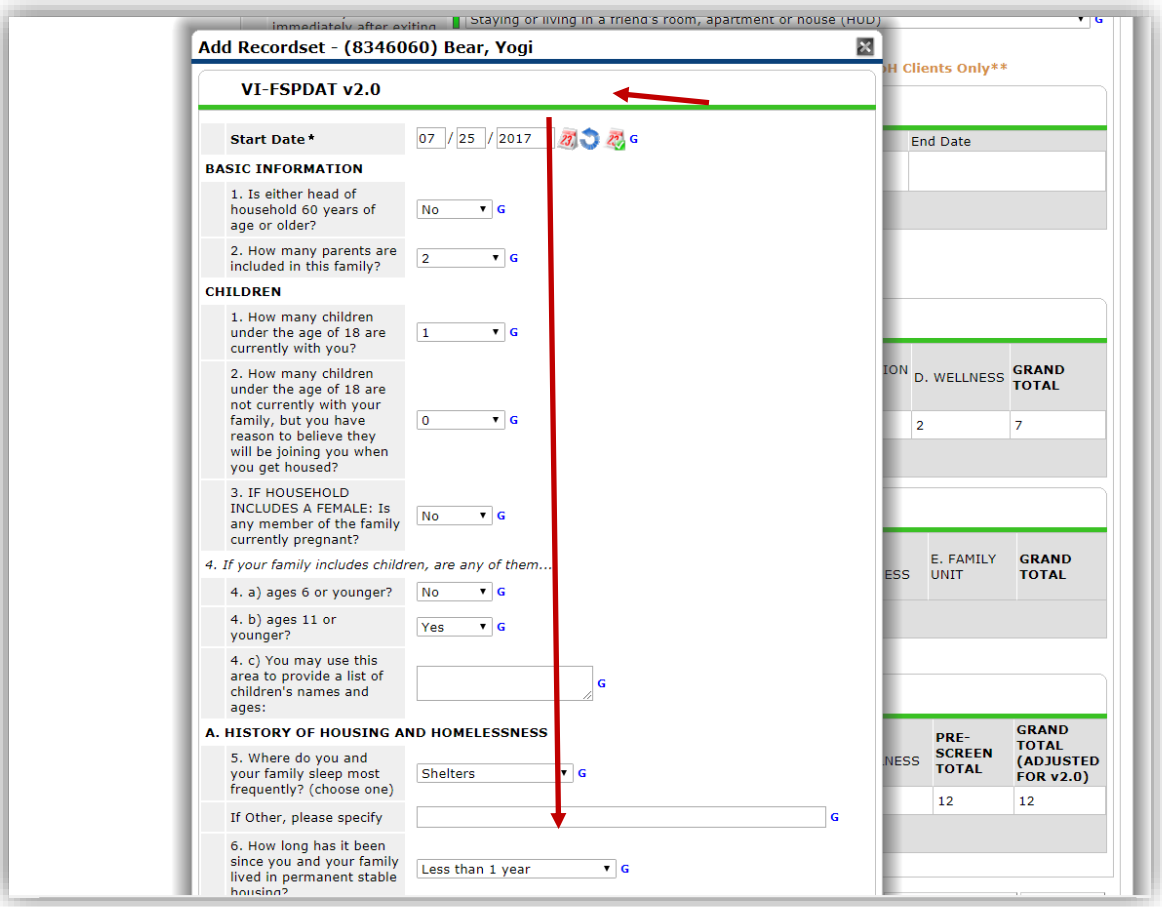


FIGURE 38

Click the **Calculate** button to determine the VI-SPDAT score. Click the **Save** button to record the score and close the pop-up window [Figure 39].

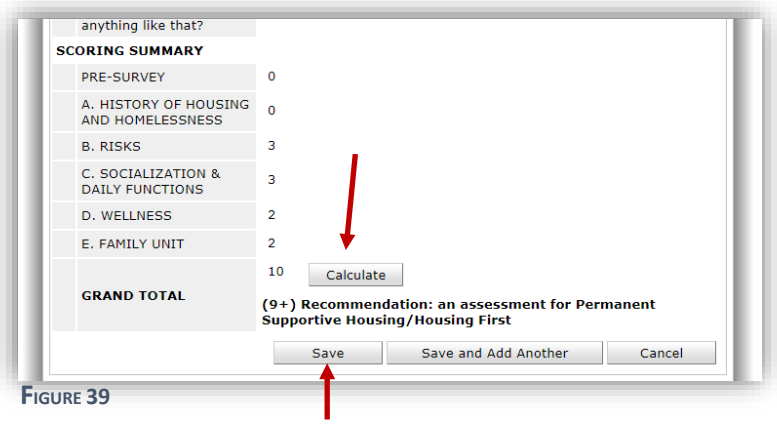


FIGURE 39

STEP 8G: Scroll to the very bottom of the page, and click the **Save** button [Figure 40].

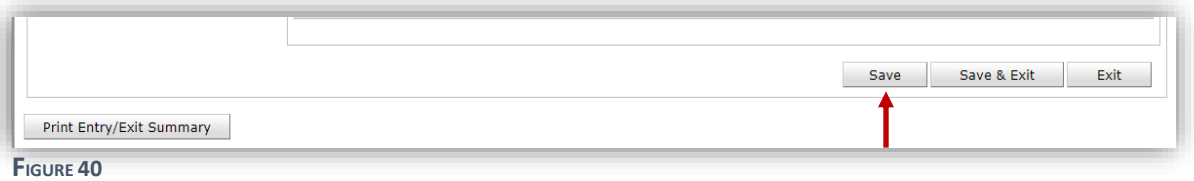


FIGURE 40

Scroll to the top of the **Entry Assessment**, and click on the next household member in the Household Members list. The client name highlighted in blue is the client record that is currently open and editable. The pop-up window will refresh and open the new client record. **Repeat Steps 8A-8G**, and complete the assessment sections that are required for the client. A green checkmark will appear next to the client name, once the record update has been completed [Figure 41].

Note: Each heading section, labeled in green, identifes the client type for which the questions are required (*All Clients* = Ages 18+ at Entry Date AND Ages <17 at Entry Date, *Adult Clients* = Ages 18+ at Entry Date, *HoH Clients* = Designated Heads of Households)

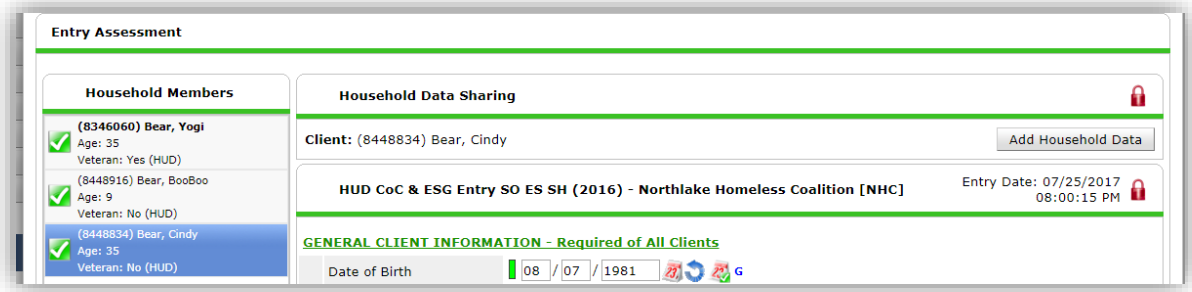


FIGURE 41

Congratulations! You have completed the process for recording a multi-person household client entry into the HMIS.

Impotant Note: Projects with permanent Housing will need to proceed to **Step G**

STEP G: Projects providing permanent housing must record the **Housing Move-in Date**, which is the date of the first night the client/s resided in the permanent housing location. To achieve this an **Interim Review Update** must be completed. Under the **Entry/Exit** tab, click the document symbol on the far right under **Interims**. [Figure 42]

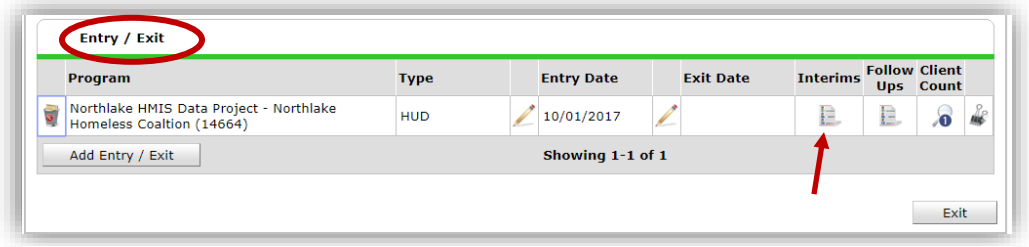


FIGURE 42

Once **Interim** is clicked, the **Interim Reviews** pop-up window will appear [Figure 43].

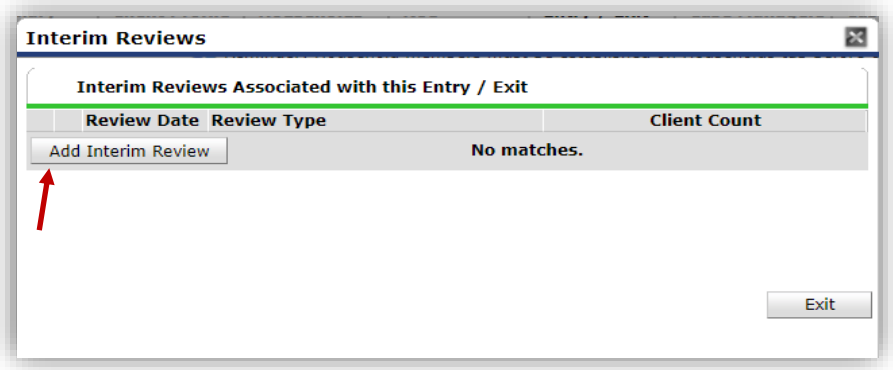


FIGURE 43

Click the **Add Interim Review** button, and the **Add Interim Review** popup window will appear.

Select the the check mark next to the family members associated with **Entry/Exit Interim Review**. Click the down arrow to access the picklist for **Interim Review Type***, select **Update** from the list. Make sure the **Review Date*** reflects the date of the first night the client resided in permanent housing, and set the time to 1:00 PM. Once completed, click **Save & Continue** button at the bottom right of the window [Figure 44].

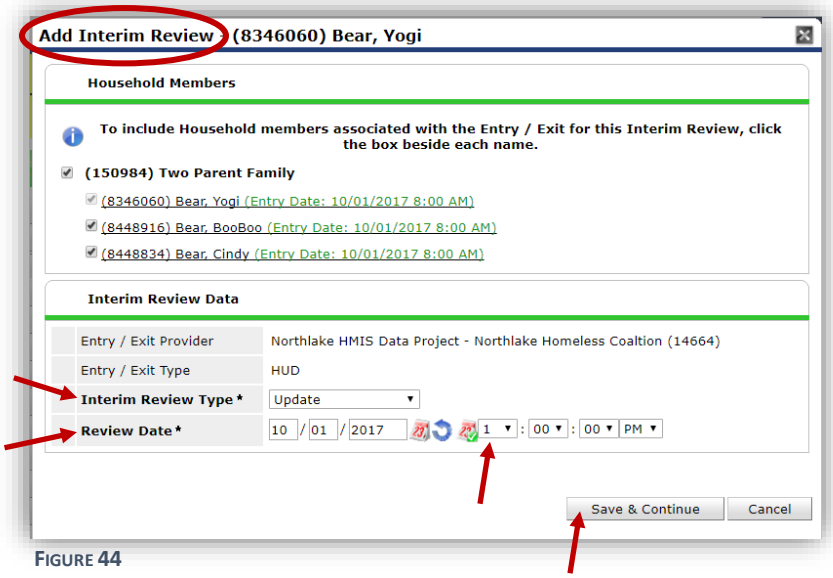
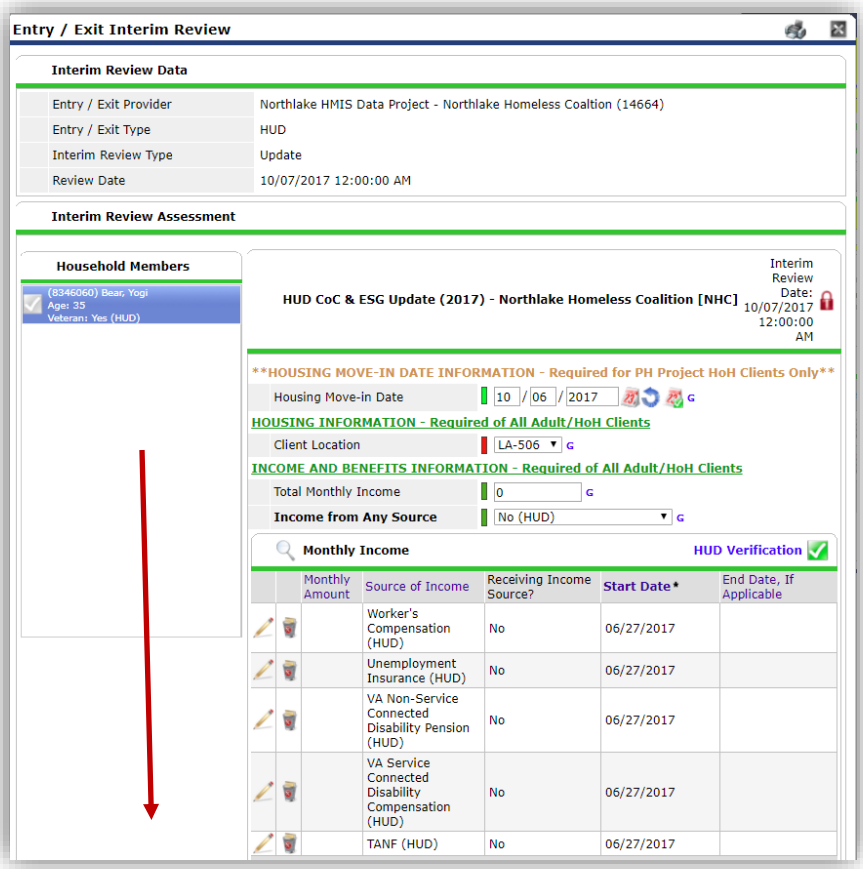
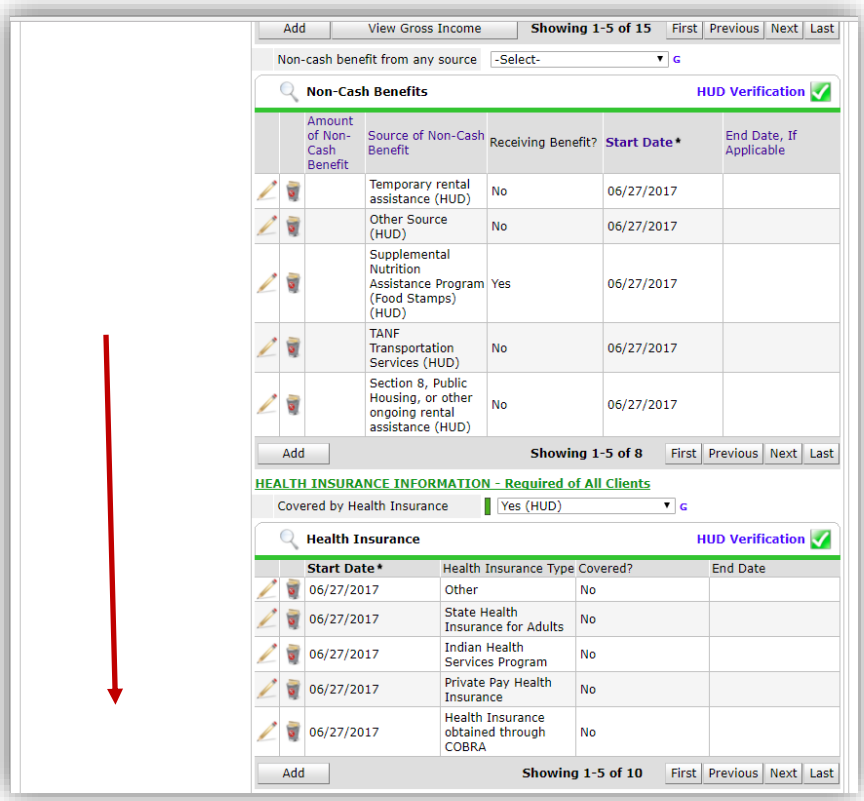


FIGURE 44

Scroll to the bottom of the assessment and **Interim Review**, click the **Save & Exit** button [Figure 45].





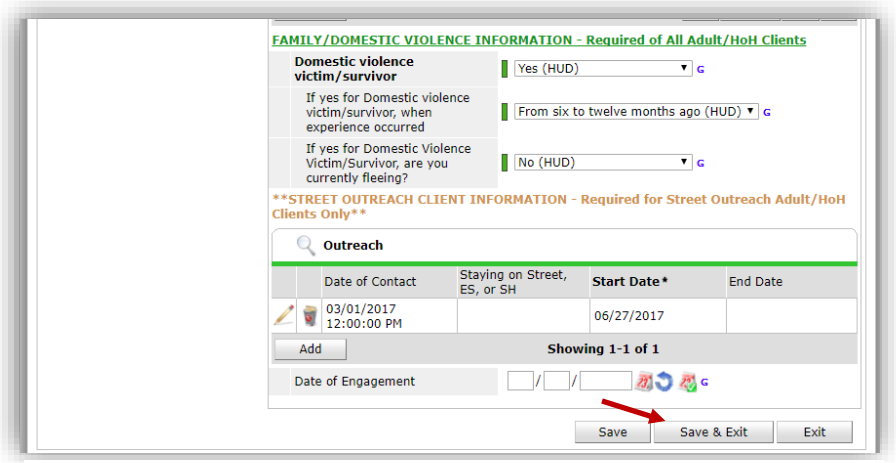

FAMILY/DOMESTIC VIOLENCE INFORMATION - Required of All Adult/HoH Clients
Domestic violence victim/survivor
Yes (HUD)
If yes for Domestic violence victim/survivor, when experience occurred
From six to twelve months ago (HUD)
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?
No (HUD)
STREET OUTREACH CLIENT INFORMATION - Required for Street Outreach Adult/HoH Clients Only
Outreach
Date of Contact
Staying on Street, ES, or SH
Start Date*
End Date
03/01/2017 12:00:00 PM
06/27/2017
Add
Showing 1-1 of 1
Date of Engagement
Save
Save & Exit
Exit

FIGURE 45

General Information for ServicePoint Usage

SERVICEPOINT ICONS

Common ServicePoint Icons

ServicePoint uses icons to assist you in completing tasks. The table below lists the most common icons you will encounter.

Icon	Name	Description
	View as Print Friendly	This page or window can be printed. Click on the icon to open a "print friendly" window, and print. *See Privacy Standard below.*
	Edit	Click on the icon to edit the record.
	Delete	Click on the icon to delete the stored information. If you are updating information, simply enter the current response. **Never delete old data as a way to update.**
	Age of Response	If bar is "green" the answer is 0-90 days old. If "green and orange" the answer is 91-360 days old. If "orange" the answer is more than 360 days old.
	Client Added by My Provider	Icon displays on search list indicating the client was added by your agency.
	Choose Date	Choose a date using the calendar tool.
	Clear Date	Reset the date field to a blank date.
	Set to Current Date	Set the date field to today's date.

PICKLISTS: ServicePoint assessments consists of different types of data fields. Some fields require you to type in information, while others have lists that drop down called picklists.

Almost all picklists include the following responses: **Client doesn't know (HUD)**, **Client refused (HUD**), and **Data not collected (HUD)**. These responses have specific uses and should be recorded, in lieu of response data collected from the client.

The **Client doesn't know (HUD)** response is only to be used when the client is unaware of the answer to the question. The **Client refused (HUD)** response is only to be used when the question has been asked, but the client has elected not to provide a response. The **Data not Collected (HUD)** response is to be used when the interviewer does not ask the client the question and/or does not collect the data.

Picklists are *1st letter sensitive*, which means you can navigate through the list by typing the first letter of the response. As an example, to select **Client doesn't know (HUD)**, press the "C" key on your keyboard once, and to select **Client Refused (HUD)**, press the "C" key on your keyboard twice.