 **HUD CoC & ESG Entry Workflow** (REV 1/27/2016)

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| **Tips:** 1. **Click “Enter Data As” as soon as you log in.**
2. **Answer EVERY question on the Entry, Update and Exit assessment; NEVER leave anything blank!**
3. **Single Point of Entry will create new client records (if a person is not found in the system).**
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| ***Enter Data As*** |
| 1 | **IMPORTANT**: After logging into ServicePoint, go to the right-hand side at the top and click on the “**Enter Data As”** link. |
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| 2 | Click on the Green Plus sign next to the applicable program for which you will be entering the client. |
| Client Search |
| 3 | Go to the menus on the left and click on Client Point: Enter client First and Last name, then Search |
| 4 | If there is a match (below), click on the pencil to the left of client name |
| 5 | If there is no match, fill out a HMIS Intake Form and fax, email or hand deliver the form to SPE (Single Point of Entry). Turn-around time can be as long as 24 hours; usually it’s just an hour or so. After Client record has been created, you can proceed with entering the person/family into your program.  |
| Manage Households (skip if client is single) |
| 6 | If no household exists for a family, click on the Household tab.Click “Start New Household” Answer Household type, Head of household, Relationship, date entered(date entered should match the program Entry Date) then Save |
| 7 | Answer the client demographics questions on this screen, then click save. Don’t exit yet.  |
| 8 | Scroll back to the top and located the other family members listed vertically on the left hand side. Click on each family member and answer the relevant entry questions. Be aware that you do not need to answer “Section II” questions for 17 and under. |
| ***Adding Additional Household Members to existing household, if applicable*** |
| 9 |  Click on Manage Household. Search for the household member. If the person’s name does not come back with results, add this person in the system.  Be aware of the dates that people join the household; look to make sure they are correct. Go to the Entry/Exit Tab and click on the pencil next to the Entry. Click Save and Continue. **DO NOT** include households at the top of the page (meaning, do not check the box next to their name).  When you click Save and Continue, include the household members in the box that is located in the middle of the screen. Make sure the date the person entered the program is reflected in this box. If it’s not, click on the pencil next to their name and enter the correct date. This date should be different than the other household members.  |
| ROI (= Data Sharing, requires signed ROI from client) |
| 10 | * Click on the ROI tab, then “Add Release”
* Check household members to include them in the release
* Answer Release granted, start and end date
* ROIs expire in one year
* Click Save Release of Information

***NOTE: Release of Information is better known as an ROI. This release allows information to be shared from project to project within an agency or across agencies. You can upload a physical copy of the release of information for clients in the KYHMIS, but agencies must have one on file for each member of the household. The head of household or other adults in the household can sign releases for under 18 year old dependents, however EVERY adult must have their own individual release. Also each adult can decide on the type of release they would like and information can be shared at different levels. Please contact your system administrator for further questions. Clients that do not wish to share information must have their records “locked”. Please contact your system administrator for that action.*** |
| Enter Client Data (Entry/Exit Screen) |
| 11 | * Click Entry/Exit tab; then Add Entry/Exit.
* Check appropriate boxes on the top right to include Household members (if any) in the entry/exit.
* Provider = the program name will show up here if you are in Enter Data As Mode.
* Type = HUD (for HUD-funded programs); Type = VA (for Veterans Affairs funded programs).
* Enter the actual program Entry date, then click SAVE and Continue.
* Answer ***ALL*** questions on the Entry Assessment form (Note: 17 and under do not need to answer “Section II” questions).
* Do not skip any questions or leave questions unanswered.
* Answer the Yes/No Question for Disability, then click on HUD Verification to specify the disability. Be certain to specify “No” for disabilities the person does NOT have.
* Answer the Yes/No Question for Income, then fill out the monthly income section utilizing HUD Verification.
* Answer the Yes/No Question for Non-Cash Benefits, then click on HUD Verification to specify details. Note: we do NOT capture dollar amounts for NCBs.
* For Health Insurance, utilize HUD Verification.
* ***\*NOTE: if there are other Household Members, proceed to Step 14…do not click “Save & Exit” yet.***
* Click Save and Exit.
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| Enter Client Data (Entry/Exit Screen) for other Household Members |
| 12 | * Click on the left hand side of the screen to select a household member.
* Answer all questions
* Click Save, then go to the next household member on the left side of the screen.
* When you have entered the entire household’s information, click on “Save & Exit” at the bottom of the screen.
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| Service Transactions |
| 13 | ***NOTE: Services are often added throughout the project stay. If the program would like to add services that are not associated with a goal, simply search client, open record, click on “Service Transactions” tab and follow the steps below.*** * Click on “Enter Data As”, then Click on the Service Transactions Tab
* Click “Add Multiple Services”
* Check the boxes for the client/household that will be receive this service. If this is based on a goal it should include the same members that the goal was for. Any time there is rent, mortgage, or utility financial assistance paid, it does apply to the entire family. If it is the entire household, simply check the box next to the household I.D. ***NOTE: Make sure to check the household members at the top of the page to see if everyone is added or if someone is added to this service that should not be.***
* Check that “Service Provider” is correct (ie. your project)
* Set the number of Services = 1 to indicate which service was provided
* Record the service Start date (End date will automatically populate to the same date)
* Select “Service Type” to specify which service is being utilized
* Funding Source - Optional: if tracking Funding Source click on ADD funding source
* Need Status = Closed (do not choose “identified” or “in progress”)
* To record additional Services, click “Add Another”
* When finished, click Save & Exit

You will be returned to the Service Transaction screen… all Service transactions are listed. |
| Record Exit Date and Update Income |
| 14 | * Click on Entry/Exit tab
* Click on pencil icon to the left of the Exit Date column
* Record Actual Exit date
* Update Housing Status for each household member
* Select and answer “Reason for Leaving” and “Destination” questions
* Click checkboxes to include other household members in the exit
* Update income:
* If client income or non-cash benefits are the same at exit, do nothing
* If client income stopped, edit it and add the End date
* If client gained new income, click “Add” and record the new income; be sure to End previous income entry if it changed (end it, do not edit income detail to reflect new $ amount).
* Save & Exit when done
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| Verify Data with the APR Report |
| 15 | Go to Reports on left hand side of screen Click on Entry/Exit reportProvider = select program name from dropdown Checkmark “Use client unique ID”Enter Report start and end dateClick Build ReportLook at numbers in Section 2 to verify that the client count is correct (click on the actual report numbers to see the names of clients) |
| Interims (For any clients remaining in any project for 365 days or more) |
| 16 | **You must be using EDA Mode in order to see Interim icon****NOTE: Annual Interims ARE REQUIRED if a client is in your project (any type) for one year or longer!*** Under the Entry/Exit Tab, click on the Interim Icon (the column to the left of “Exit Date”
* Click “Add Interim Review”
* Check the box above to include all household members
* Select the “Interview Review Type”:
	+ Update – Do NOT choose this one if you are completing the Annual Review
	+ Annual Assessment
* Make sure the date is set to the correct date of the review
* Click Save and Continue
* Answer the questions – End income and NCB entries if a change has occurred, then make a new entry documenting that change (do not edit old entries to reflect changes!).
* Click Save and Exit when finish.
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| To Get Out of “Enter Data As” Mode |
| 17 | When you are finished with the program, click on the program name. This will take you back to the agency setting. |