



## USER BULLETIN: Disability Information 12-Dec-13

This User Bulletin will seek to clarify the steps to be completed when adding or editing a client's disability information.

### **STEP 1: Viewing current client information**

When you first log into ServicePoint, you will be taken to the home screen. To view client disability information please go to the ClientPoint page, as indicated by the red arrow in Figure 1.

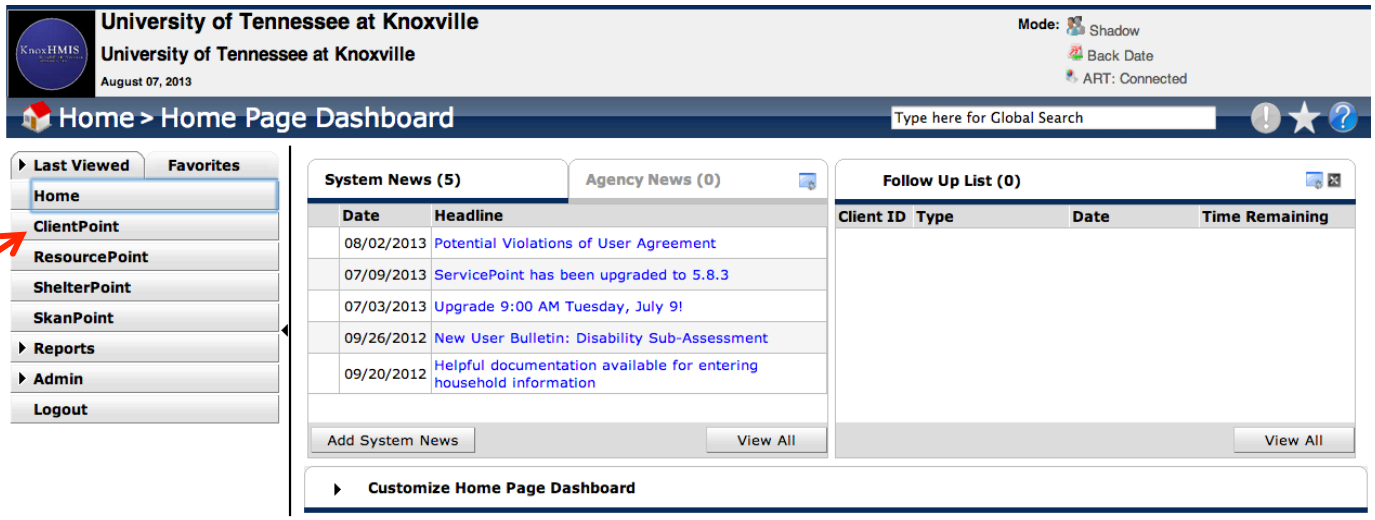


Figure 1

When you click on this button, it will take you to the “Client Search” screen. You will want to search by the client’s name and social security number (if available). You can also search by the Client ID if known (Figure 3).

**Client Search**

Please Search the System before adding a New Client.

First Middle Last Suffix

Name: caitlin [ ] test [ ]

Alias: [ ]

Social Security Number: [ ] - [ ] - [ ]

Social Security Number Data Quality: --Select--

Exact Match:

Search ACTIVE Clients:

Search INACTIVE / DELETED Clients:

Search ALL Clients:

Buttons: Search, Clear, Add New Client With This Information, Add Anonymous Client

**Figure 2**

**Client Number**

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

Client ID # [ ] Submit

**Figure 3**

If you search for your client with his/her name, he or she will populate on the low end of the page as shown in Figure 4. To access the client page, you will need to click the pencil next to the client’s name as indicated by the red arrow in Figure 4.

If you searched for your client with his/her Client ID, you will be taken directly to the client page as shown in Figure 5.

If your client has not yet been created, please go to <https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/09/OrderofEntry.pdf> for information on how to create a new client.

Client Results								
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	32001	Test, Caitlin T	***-**-4567	06/20/1991		Female		1
Showing 1-1 of 1								

**Figure 4**

You will then be taken to the Client Profile as shown in Figure 5. **Do not make changes on this page.**

**Client - (32001) Test, Caitlin T**

(32001) Test, Caitlin T  
Release of Information: **None**

Switch to Another Household Member- [Submit]

**Client Information** | **Service Transactions**

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

**Client Record** [Issue ID Card]

Name	Test, Caitlin T
Alias	
Social Security	--4567
SSN Data Quality	Partial SSN Reported (HUD)
Age	22

[Change] [Clear]

**Figure 5**

**STEP 2: Adding a client's disability**

Continue to the Entry/Exit tab as indicated by the red arrow in Figure 5. This is where you will enter the client's disability information.

You should already have an existing entry for you program with your client. If you do not, please reference <https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/09/OrderofEntry.pdf> to create an entry before proceeding.

Client disability information is located in your entry. To access the entry, please click the pencil next the entry as indicated by the red arrow in Figure 6.

**Entry / Exit**

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
University of Tennessee at Knoxville (1)	HUD	10/24/2013				

[Add Entry / Exit] Showing 1-1 of 1

**Figure 6**

On the “Edit Entry Data” screen, click “Save & Continue,” as indicated by the red arrow in Figure 7.

**Edit Entry Data - (32001) Test, Caitlin T**

**Household Members**

No Household Members were originally associated.

Include Additional Household Members

**Edit Entry Data - (32001) Test, Caitlin T**

Provider	University of Tennessee at Knoxville (1)
Type	HUD
Entry Date *	10 / 24 / 2013 10 : 11 : 57 AM

Save & Continue Cancel

Figure 7

You will be taken to the “Entry/Exit Data” screen as shown in Figure 8. To add your client’s disability information, please scroll down the page to find the “Disability Information” section.

**Entry/Exit Data**

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

Provider \* University of Tennessee at Knoxville (1) Search My Provider Clear

Type \* HUD Update

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

Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(32001) Test, Caitlin T		10/24/2013						

Include Additional Household Members Showing 1-1 of 1

**Entry Assessment**

**Household Members**

(32001) Test, Caitlin T Age: 22

**Household Data Sharing**

Client: (32001) Test, Caitlin T Add Household Data

HUD-40118 Entry Date: 10/24/2013 10:11:57 AM

**Case Manager**

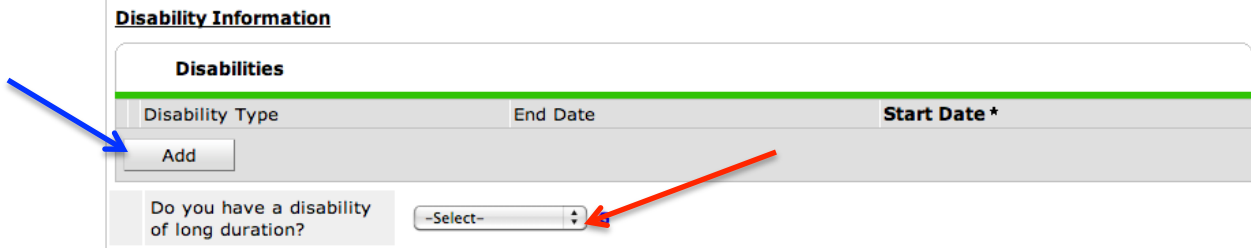
Primary CM?	First Name	Last Name	Agency	Phone	Start Date *	End Date
Yes	Lisa	Higginbotham	KnoxHMIS		07/31/2013	

Add Showing 1-1 of 1

Figure 8

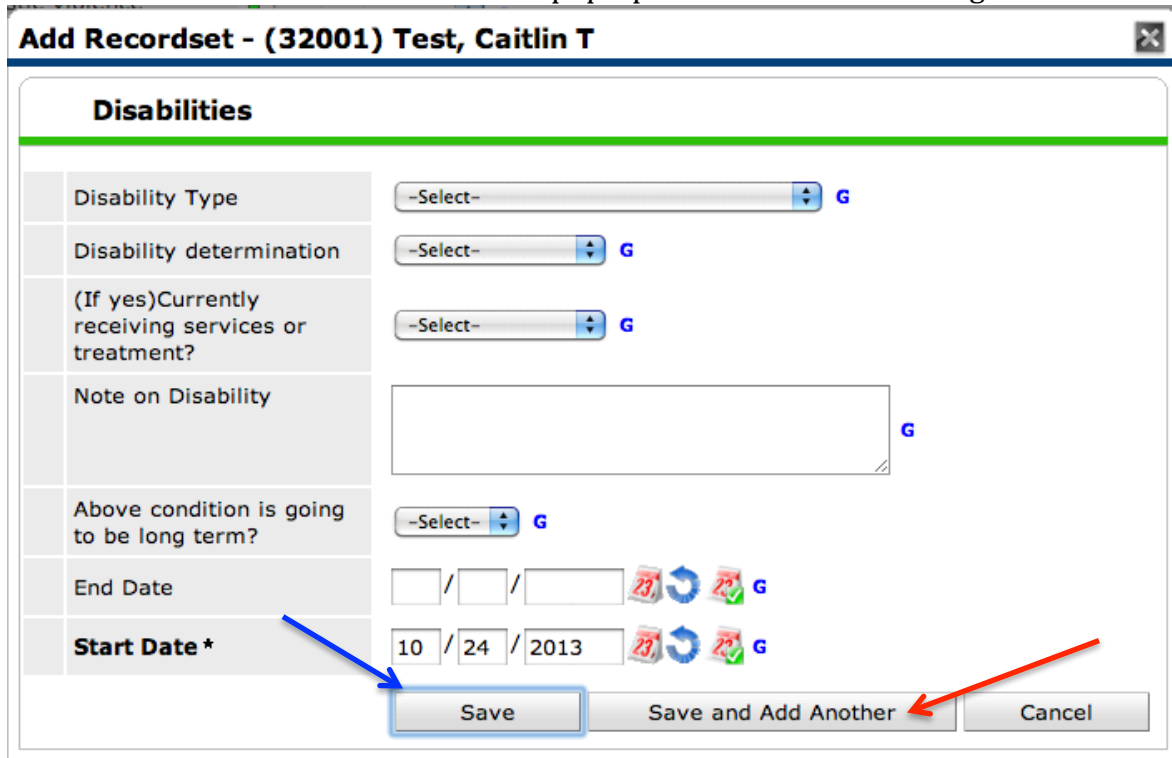
**Adding Disability Information:**

Please select the appropriate answer for “Do you have a disability of long duration?” as shown in Figure 9. If you selected “Yes” for this question, you can then click “Add” as indicated by the blue arrow in Figure 9.



**Figure 9**

You will then be taken to the “Add Recordset” pop-up window as shown in Figure 10.



**Figure 10**

Select the appropriate “disability type” from the drop-down list.

For “disability determination,” if the disability (physical/medical, developmental, or mental health), is documented, select “yes.” If the disability is not documented, select “no.”

For all other disabilities, select “yes” for “disability determination,” even if documentation is not available.

Select the appropriate answer for “Currently receiving services or treatment?”

If relevant, you can add a note on the disability.

Select the appropriate answer for “Above condition is going to be long term?”

Please leave “End Date” blank.

If the client has only one disability, select “Save” as indicated by the blue arrow in Figure 10.

To add another disability, select “Save and Add Another” as indicated by the red arrow in Figure 10.

When you have finished entering all client disabilities, click “Save” to exit.

### **STEP 3: Editing and Updating Client Disabilities**

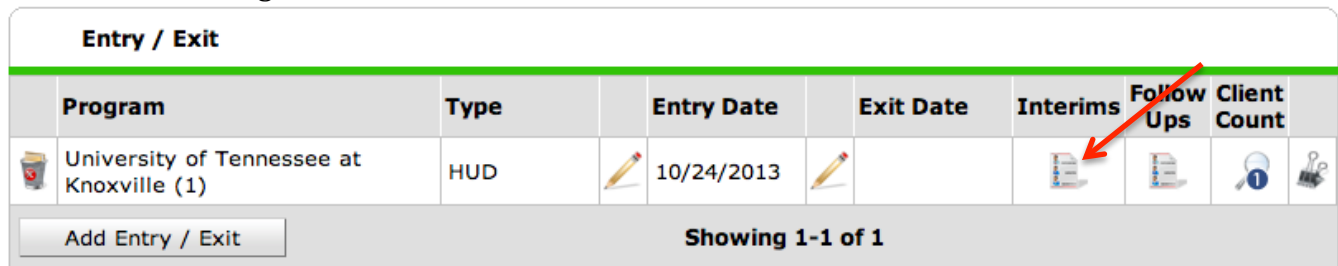
As you get to know clients, you may get a better sense of their disability situation. Please record any additional information you gather from clients so their complete disability situation is recorded.








Disability updates are necessary when:

- The client has a disability that was not present or identified at program entry.
- You have obtained documentation for disability
- A disability has ended (extremely rare)

To edit or update your client’s disability information, proceed to the entry/exit tab as shown in the step above.

Please click the notepad in the “Interims” column to update disability information as indicated by the red arrow in Figure 11.

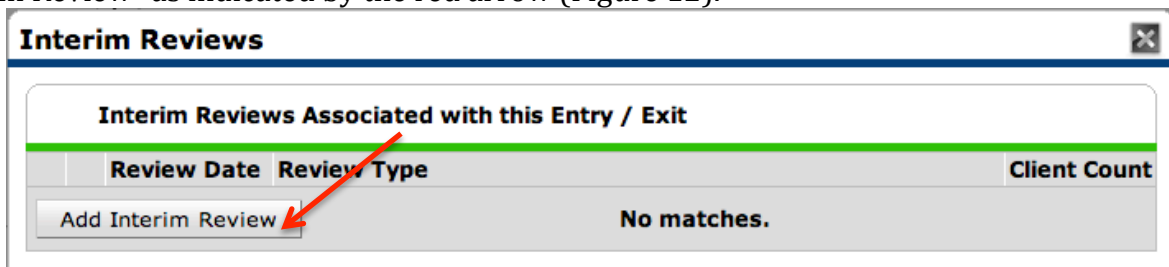


Entry / Exit								
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count		
 University of Tennessee at Knoxville (1)	HUD	 10/24/2013						

Add Entry / Exit      Showing 1-1 of 1

**Figure 11**

You will then be taken to the “Interim Reviews” popup as shown in Figure 12. Please click “Add Interim Review” as indicated by the red arrow (Figure 12).



Interim Reviews Associated with this Entry / Exit		
Review Date	Review Type	Client Count
No matches.		

Add Interim Review

**Figure 12**

You will then be taken to the “Add Interim Review” popup as shown in Figure 13. Please select the “Client Update” as the “Interim Review Type.” Then click “Save & Continue.”



Figure 13

You will then be taken to the “Entry/Exit Interim Review” Popup. To update or edit your client’s disability information, please scroll down the page to find the “Disability Information” section (Figure 15).

Primary CM?	First Name	Last Name	Agency	Phone	Start Date *	End Date

Figure 14

**Disability Information**

Disabilities			
	Disability Type	End Date	Start Date *
 	Mental Health Problem (HUD 40118)		12/11/2013

Showing 1-1 of 1

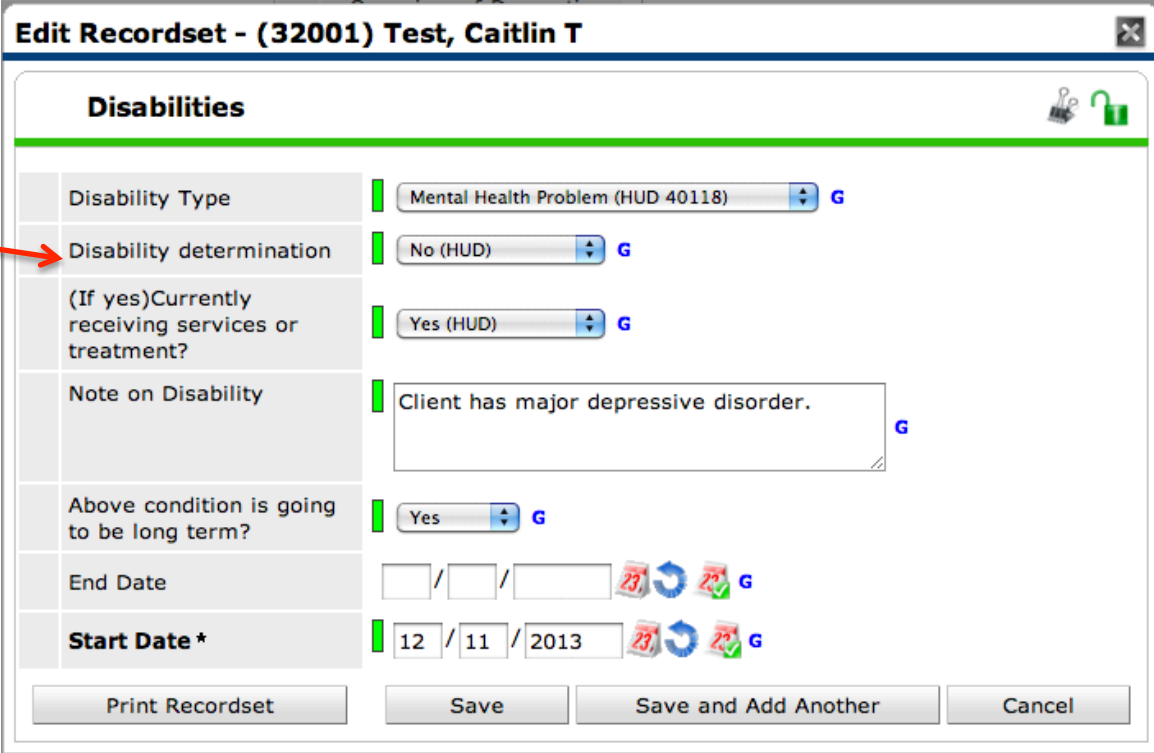
Do you have a disability of long duration?  G

**Figure 15**







**A. To add a disability that was not present or identified at program entry,** please click “Add” and follow the steps indicated previously.

When you have finished, scroll to the bottom of the “Entry/Exit Interim Review” Assessment and click “Save & Exit.”

**B. To indicate that you have obtained documentation for the disability,** please click the pencil next to the disability. This will open the “Edit Recordset” Popup shown in Figure 16. Change the answer for “Disability Determination” to “Yes.” You can then click “Save.”



**Edit Recordset - (32001) Test, Caitlin T**

Disabilities	
Disability Type	<input type="button" value="Mental Health Problem (HUD 40118)"/> G
Disability determination	<input type="button" value="No (HUD)"/> G
(If yes)Currently receiving services or treatment?	<input type="button" value="Yes (HUD)"/> G
Note on Disability	<input type="text" value="Client has major depressive disorder."/> G
Above condition is going to be long term?	<input type="button" value="Yes"/> G
End Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    G
Start Date *	<input type="text" value="12"/> / <input type="text" value="11"/> / <input type="text" value="2013"/>    G

**Figure 16**

When you have finished, scroll to the bottom of the “Entry/Exit Interim Review” Assessment and click “Save & Exit.”



**C. To indicate a disability has ended**, please click the pencil next to the disability as shown in Figure 15. This will open the “Edit Recordset” Popup shown in Figure 17. Add an end date for the disability and then click “Save.”

**Edit Recordset - (32001) Test, Caitlin T**

**Disabilities**

Disability Type	Mental Health Problem (HUD 40118) G
Disability determination	No (HUD) G
(If yes)Currently receiving services or treatment?	Yes (HUD) G
Note on Disability	Client has major depressive disorder. G
Above condition is going to be long term?	Yes G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/> 23 23 G
Start Date *	12 / 11 / 2013 23 23 G

Print Recordset Save Save and Add Another Cancel

**Figure 17**

When you have finished, scroll to the bottom of the “Entry/Exit Interim Review” Assessment and click “Save & Exit.”

**You are now finished adding/editing client disability information.  
Please contact [hmissupport@utk.edu](mailto:hmissupport@utk.edu) if you have any questions.**