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USER BULLETIN: Order of Entry
3-Sept-13

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

Per HMIS policy 10.4.1, all HMIS Member Agency client data should be entered in real-time or no later than 24 hours after intake, assessment, or program or service entry or exit.

STEP 1: Adding a new client or edit an existing client

When you first log into ServicePoint, you will be taken to the home screen. To add or edit a new client, please go to the ClientPoint page, as indicated by the red arrow.

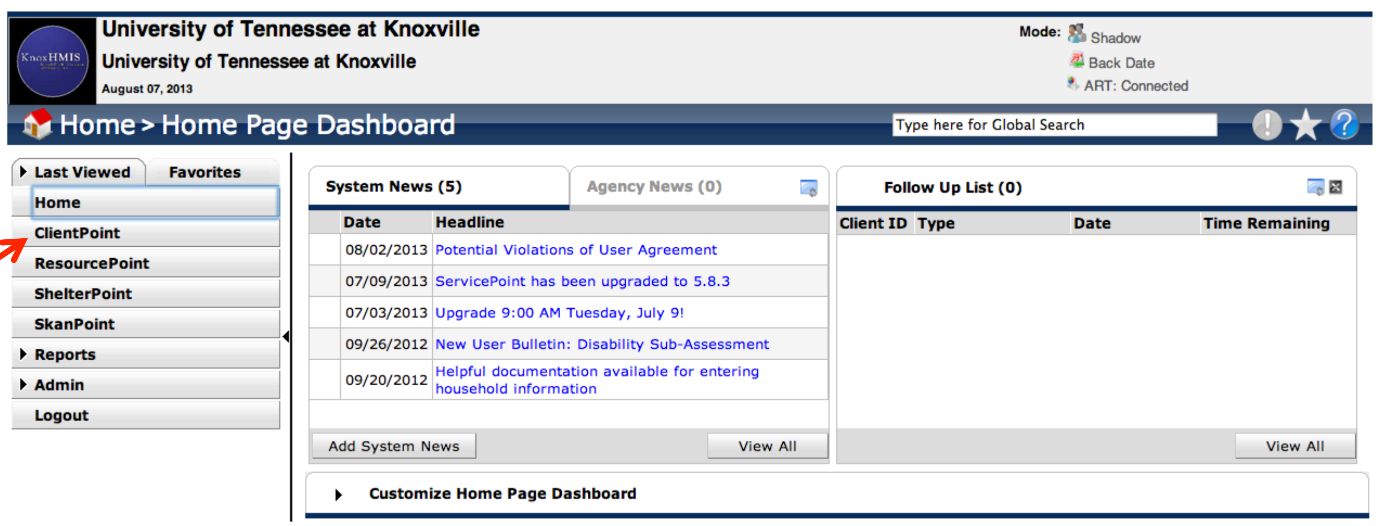

Figure 1-1

When you click on this button, it will take you to the following screen. You will want to search by the client's name and social security number (if available).

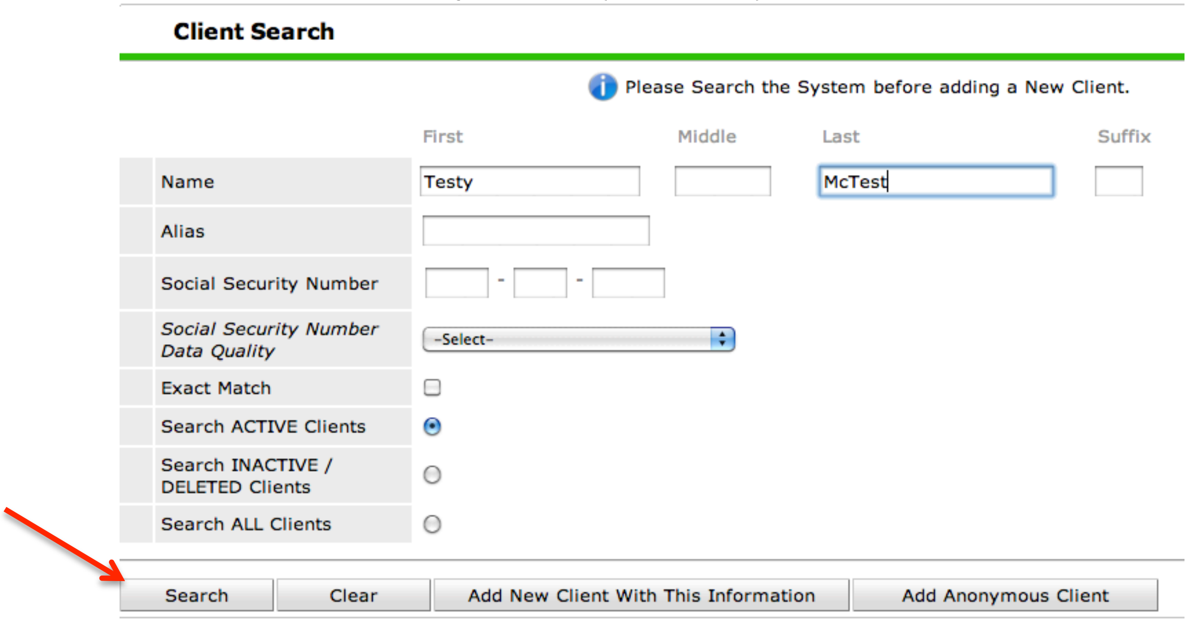

Figure 1-2

If the client is already in the system, he or she will populate on the low end of the page. As we can see here, my client is already in the system.

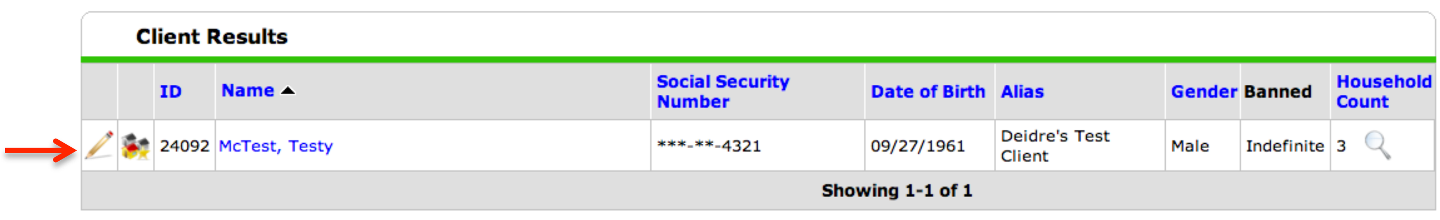

Figure 1-3

Since the client already exists, you will need to click the pencil next to the client's name.

However, if your client hadn't previously been entered into KnoxHMIS, you would see "No matches."

You would then "Add new client with this information" as seen in Figure 1-2.

If you are creating a new client, please read this pop-up carefully before proceeding.

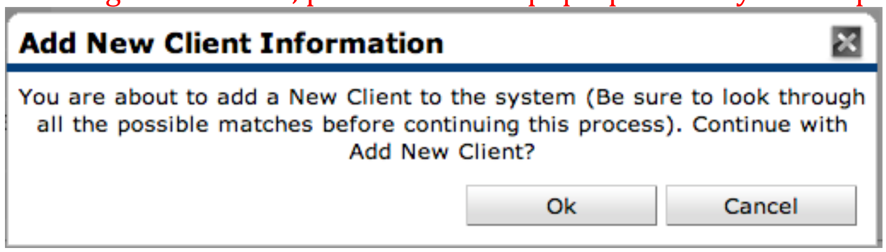

Figure 1-4

You will then be taken to the Client Profile. **Please refrain from making changes on this page.** You can change a client's name and social security number from this page, but please exercise caution and refrain from doing so unless you have verification for these items.

Pay special attention to the header (indicated by the red arrow). It is through these tabs that we will work to add or edit client information. (Including households, ROI, Entry/Exits, case plans, and services)

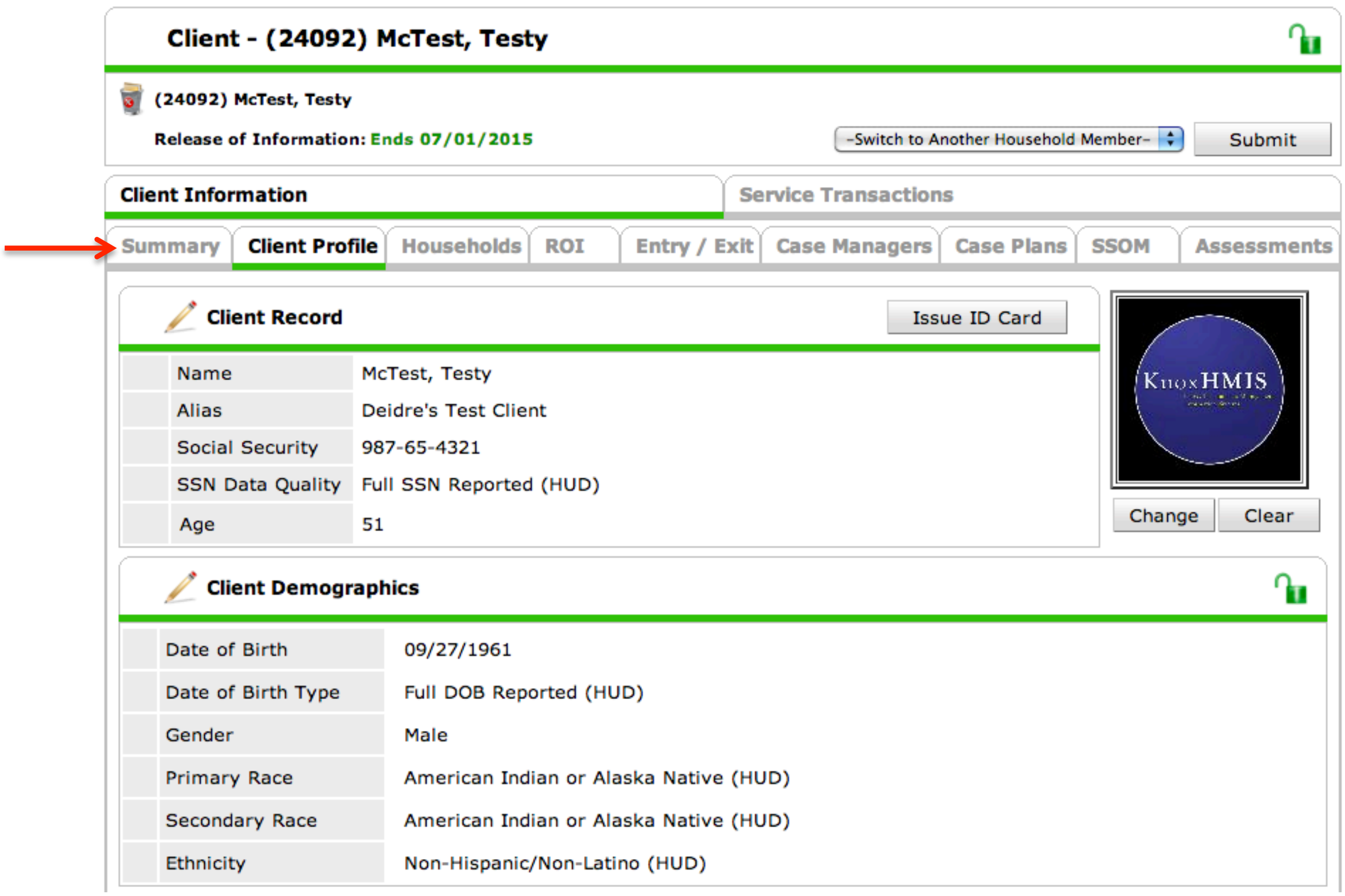

Figure 1-5

STEP 2: Creating or Editing a Household

You can do this by clicking the "Households" tab at the top of the page. As you can see, the client Testy is currently in a household with his wife and son. If Testy was no longer in this household (Example, if Testy were entering a program as a single male), you could click "Manage Household" and remove a client or clients from a household. More information on creating and managing households can be found at the following link: [https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/09/UserBulletinHouseholds.pdf]

(10518) Two Parent Family

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(24092) McTest, Testy	51	Yes	Self	01/01/2006	0	3
(30104) McTest, Lisa	55	No	Wife	02/21/2013	0	1
(25131) McTest, Quizz	8	No	Son	04/12/2009	0	1

Manage Household

Figure 1-5

If you need to add a new household, you will see the following screen. It is important that you "Search Existing Households" that you client may be a member of. **If you *do not* find an existing household, you will continue to "Start New Household."**

Figure 1-6

When clicking "Start New Household," you will be taken to a search screen that you will use to make sure you are not creating a duplicate client.

Please search for each client that you are adding to this household. When you have found the client you intend to add to the household, please click the "+" next to this person to add him/her to the household. Complete these actions until you have added all clients to the household.

Then select the appropriate household type (located at the top of the screen) and click "continue." **The "Other" Household type is used for single individuals.**

On the next screen, select the appropriate choice for "Head of Household" and "Relationship to Head of Household" drop-down menus. As a reminder, if the client is the head of household, Head of Household will be "yes," and "Relationship to Head of Household" will be "Self." Once you have completed these steps, you can "save and exit."

STEP 3: Creating a Release of Information (ROI)

After completion of the households tab, you will continue to the "ROI" tab. When you were trained, you were told that a client must have a Release of Information, or ROI, to be entered into KnoxHMIS. **A hard copy of the ROI must be on file with the agency and/or program.** The ROI tab is where you enter the proof of that ROI. The ROI can last up to **two years or agency policy** for expiration. If the ROI applies to more than one person, please make sure to check the box next to the Household, as seen in Figure 1-7.

Figure 1-7

Please complete the Release of Information Data section (Figure 1-8). Change the answer for “Release Granted” to yes. “Start Date” is the date the client enters the program and signs a hard copy of the ROI, and “End Date” is the date of ROI expiration. Unless told otherwise, “Documentation” will be “Signed Statement from Client.” You can then click “Save Release of Information.”

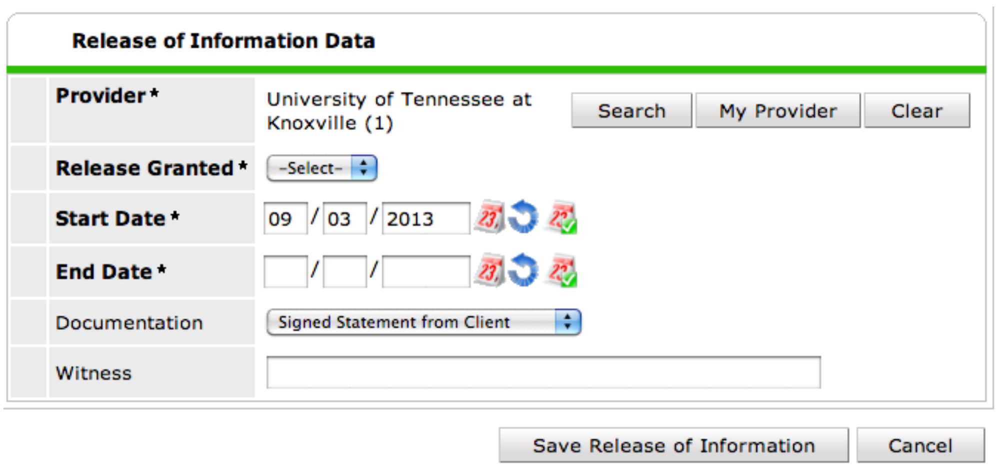

Figure 1-8

Hard copies of the ROIs can also be scanned and added into HMIS through attachments, as indicated in Figure 1-9.

Figure 1-9

STEP 4: Creating a program ENTRY/EXIT

Continue to the Entry/Exit tab. This is where we will enter all client information. Go to the bottom of the page and click “Add Entry/Exit.”

On the next screen (Figure 1-10), please select the household you created earlier by clicking the box next to the Household, as indicated in Figure 1-7. Please select the entry type. **Unless you have been told otherwise, please select the type as “HUD.”** Please select “Save & Continue.”

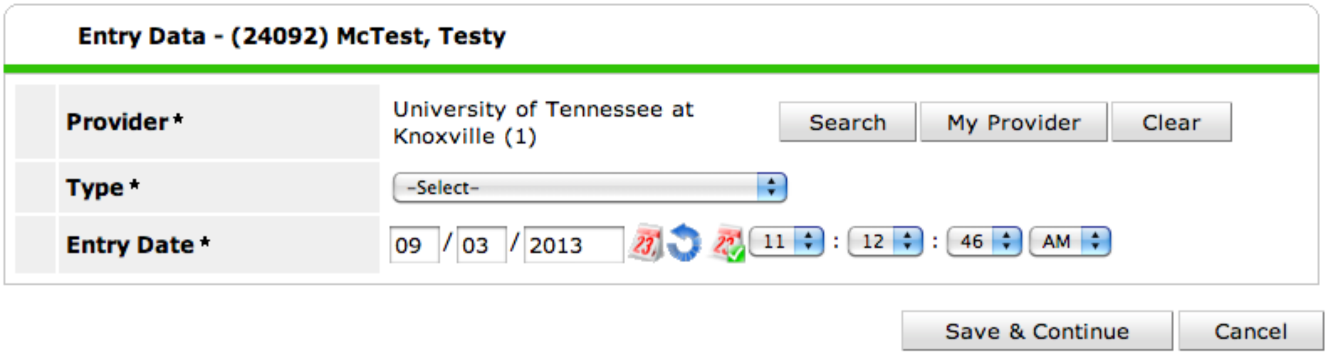

Figure 1-10

You will be taken to a screen that looks very similar to the one below:

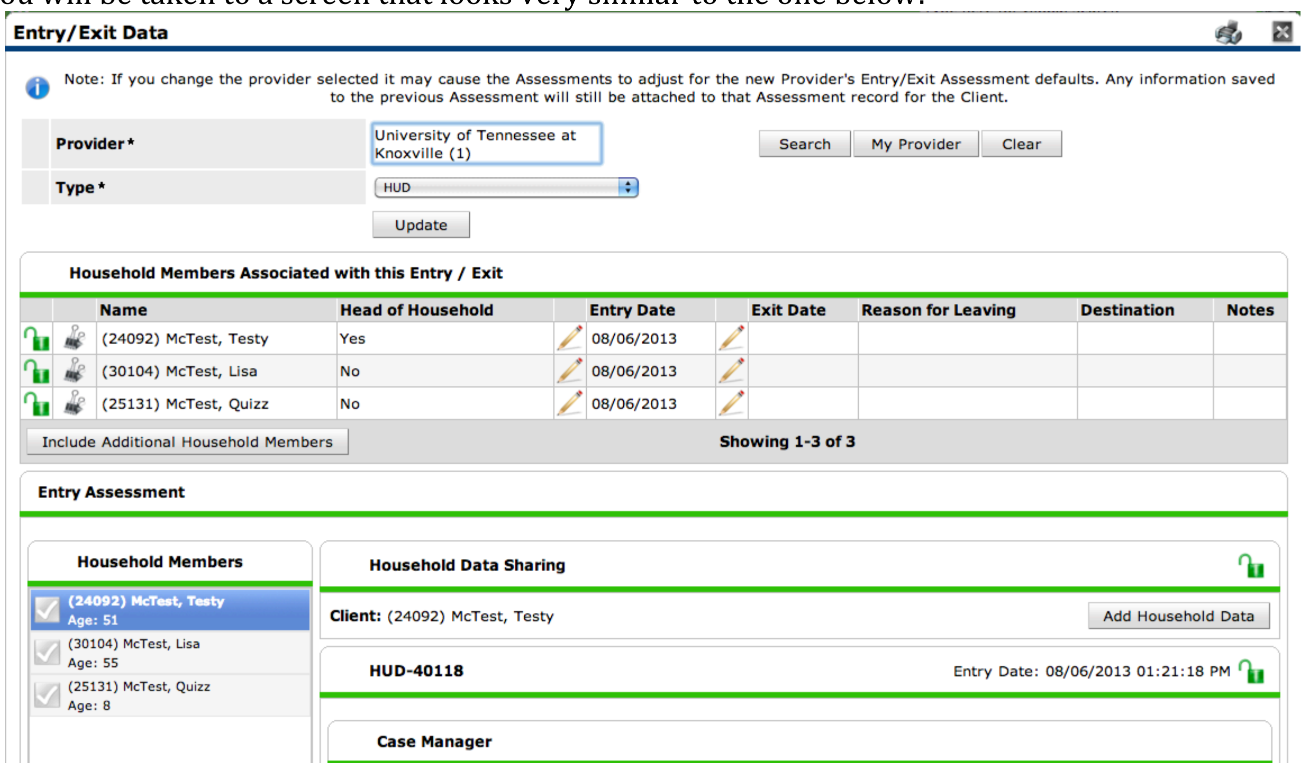

Figure 1-11

Please fill out all information asked on the page. **You must enter all of the Universal Data Elements on each client served in addition to any program specific data elements required by your agency or funder.** The list of Universal Data Elements can be found at: https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/08/Universaldataelementsrequirements.pdf

A video explaining the "Housing Status" located in HUD-40118 can be found at: http://www.youtube.com/watch?v=G0Ruq9I8V5U

A workflow explaining the disability information section of this page can be found at: https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/10/DisabilitiesWorkflow.pdf

A workflow explaining the “Monthly income” and “Non-cash benefits” sections on this page can be found at:
https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/10/IncomeWorkflow.pdf

There are a few features available on this page that you may want to take note of. Please refer to Figure 1-12. If you hover over the items on the left with your mouse or click on the item, for example, “Is the Client Chronically Homeless,” you will see a pop-up of the definition of the term.

Also note the red boxes next to the recorded data. If you click on these boxes, it will tell you how old this data is and who added this data.

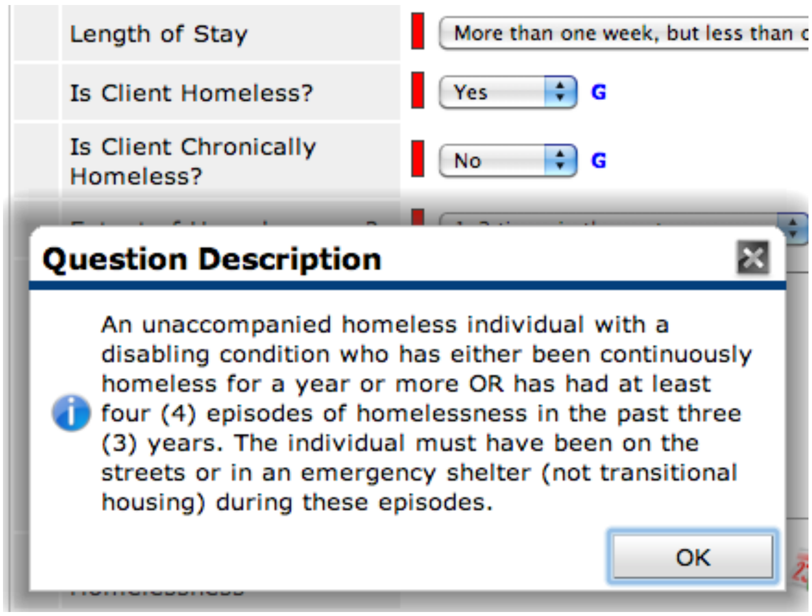

Figure 1-12

***Finally, please note the sidebar entitled “Household Members.” You will need to fill out all data on each household member (even children). When you have completed one household member’s “Entry Assessment,” you can continue to another household member’s assessment. When you have saved all entry assessments for the household members, they will have a green arrow next to their name, as seen in Figure 1-13.

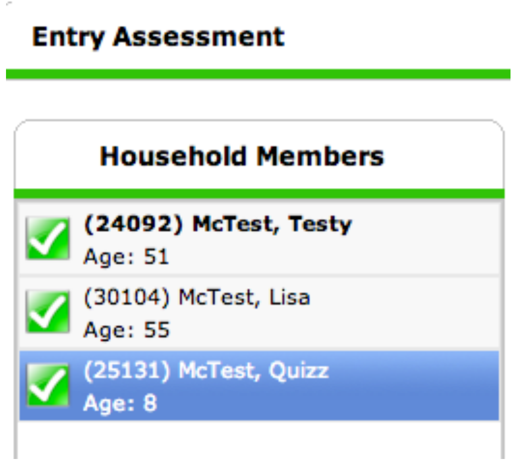

Figure 1-13

When you have completed the “Entry Assessment” for all household members, you can click “Save & Exit.”

<u>STEP 5: Creating a program EXIT</u>
To exit a client, we will stay on the Entry/Exit tab. To create an exit, you will click the pencil next to the “Exit Date” column.

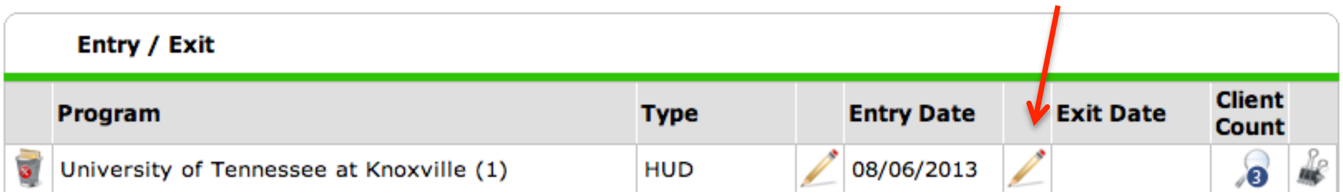

Figure 1-14

On the following screen, please select the household members that are exiting the program. If the entire household is exiting together, please select the box next the household, as previously indicated in Figure 1-7. Double-check to make sure the exit date is correct. If it is not, please change it to the correct date. Continuing down this screen, select the appropriate reason for leaving and exit destination (Figure 1-15). Then click “Save & Continue.”

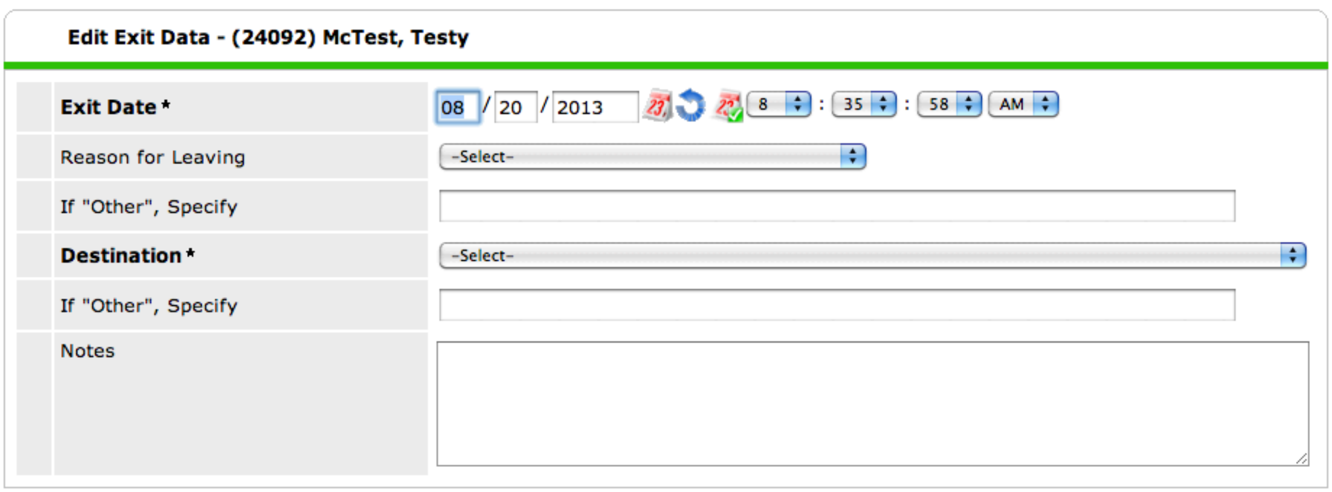

Figure 1-15

You will be taken to the “Exit Assessment” Tab, as indicated in Figure 1-16. You will complete this Assessment in a similar way to Step 4. Please make sure that all information on this page is current. Also make sure that all Universal Data Elements have been entered.

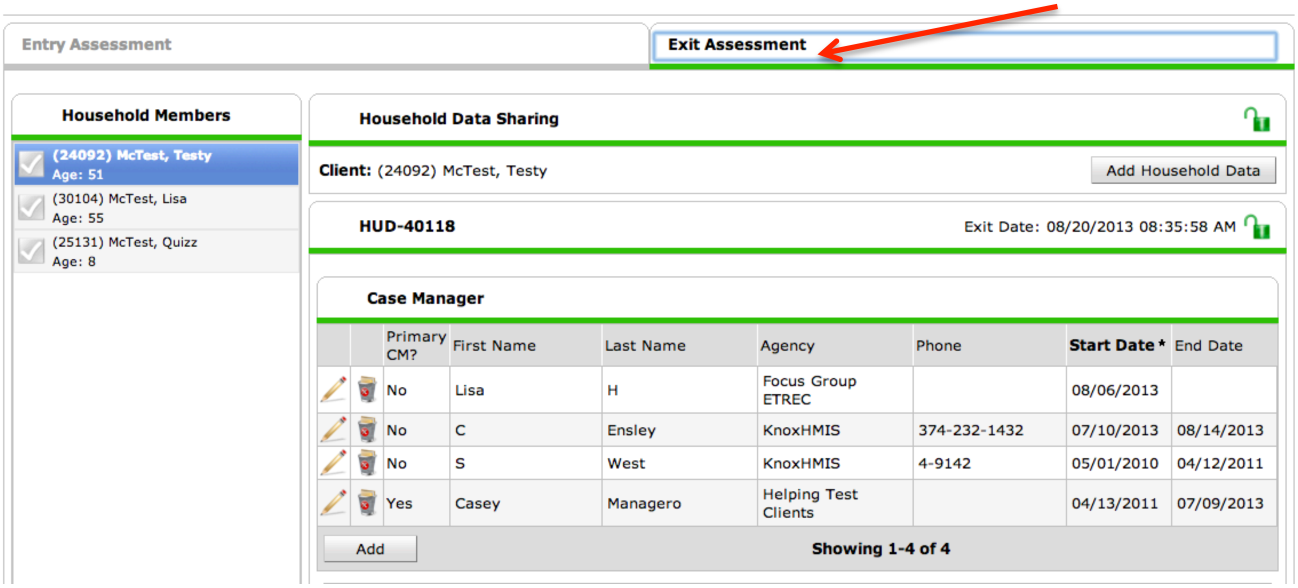

Figure 1-16

Again, please note the sidebar entitled “Household Members.” You will need to fill out all data on each household member (even children). When you have completed one household member’s “Exit Assessment,” you can continue to another household member’s assessment. When you have saved all exit assessments for the household members, they will have a green arrow next to their name, as seen previously in Figure 1-13

You are now finished entering and/or exiting a client!
Please contact hmissupport@utk.edu if you have any questions