



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.


The screenshot shows the ServicePoint Home Page Dashboard. At the top, it displays "University of Tennessee at Knoxville" and the date "August 07, 2013". The main navigation bar includes "Home > Home Page Dashboard" and a search box. On the left, a "Last Viewed" menu lists "Home", "ClientPoint", "ResourcePoint", "ShelterPoint", "SkanPoint", "Reports", "Admin", and "Logout". A red arrow points to "ClientPoint". The main content area features three sections: "System News (5)", "Agency News (0)", and "Follow Up List (0)". The "System News" section contains a table with columns "Date" and "Headline".

Date	Headline
08/02/2013	Potential Violations of User Agreement
07/09/2013	ServicePoint has been upgraded to 5.8.3
07/03/2013	Upgrade 9:00 AM Tuesday, July 9!
09/26/2012	New User Bulletin: Disability Sub-Assessment
09/20/2012	Helpful documentation available for entering household information

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).

Client Search




 Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	Testy		McTest	
Alias				
Social Security Number	- - -			
Social Security Number Data Quality	-Select-			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

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.

Client Results

	ID	Name ^	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
 	24092	McTest, Testy	***-**-4321	09/27/1961	Deidre's Test Client	Male	Indefinite	3 

Showing 1-1 of 1

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.

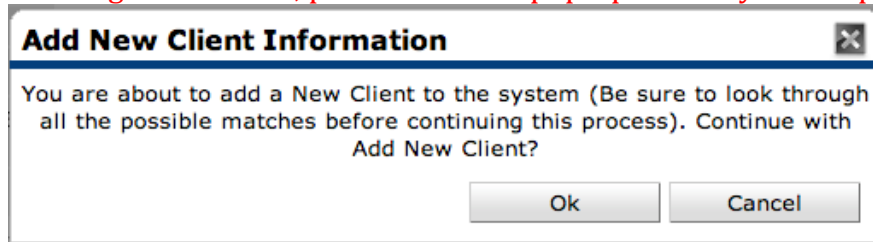


Figure 1-4

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)

The screenshot shows the "Client Profile" page for a client named "(24092) McTest, Testy". At the top, there is a header with the client name and a lock icon. Below the header, there is a sub-header with the client name and a "Release of Information: Ends 07/01/2015" notice. A dropdown menu shows "-Switch to Another Household Member-" and a "Submit" button. The main content area has two tabs: "Client Information" and "Service Transactions". Under "Client Information", there are several sub-tabs: "Summary", "Client Profile", "Households", "ROI", "Entry / Exit", "Case Managers", "Case Plans", "SSOM", and "Assessments". A red arrow points to the "Client Profile" tab. The "Client Profile" tab is active and shows a "Client Record" section with a table of client details and an "Issue ID Card" button. The "Client Demographics" section is also visible below the record table. The "Client Record" table contains the following data:

Name	McTest, Testy
Alias	Deidre's Test Client
Social Security	987-65-4321
SSN Data Quality	Full SSN Reported (HUD)
Age	51

The "Client Demographics" section contains the following data:

Date of Birth	09/27/1961
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	American Indian or Alaska Native (HUD)
Secondary Race	American Indian or Alaska Native (HUD)
Ethnicity	Non-Hispanic/Non-Latino (HUD)

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.”**

This Client is not currently a member of any Households.

▶ Previous Households

Search Existing Households Start New Household Exit

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.

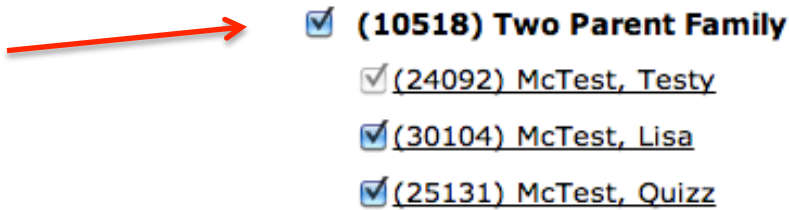


Figure 1-7

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.

Release of Information					
	Provider	Permission	Start Date	End Date	
	University of Tennessee at Knoxville	Yes	07/01/2013	07/01/2015	

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.”

Entry Data - (24092) McTest, Testy

Provider *	University of Tennessee at Knoxville (1)	Search	My Provider	Clear
Type *	-Select-			
Entry Date *	09 / 03 / 2013	11	: 12	: 46 AM

Save & Continue Cancel

Figure 1-10

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

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	Reason for Leaving	Destination	Notes
(24092) McTest, Testy	Yes	08/06/2013				
(30104) McTest, Lisa	No	08/06/2013				
(25131) McTest, Quizz	No	08/06/2013				

Include Additional Household Members Showing 1-3 of 3

Entry Assessment

<p>Household Members</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> (24092) McTest, Testy Age: 51 <input checked="" type="checkbox"/> (30104) McTest, Lisa Age: 55 <input checked="" type="checkbox"/> (25131) McTest, Quizz Age: 8 	<p>Household Data Sharing</p> <p>Client: (24092) McTest, Testy Add Household Data</p> <p>HUD-40118 Entry Date: 08/06/2013 01:21:18 PM</p> <p>Case Manager</p>
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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.

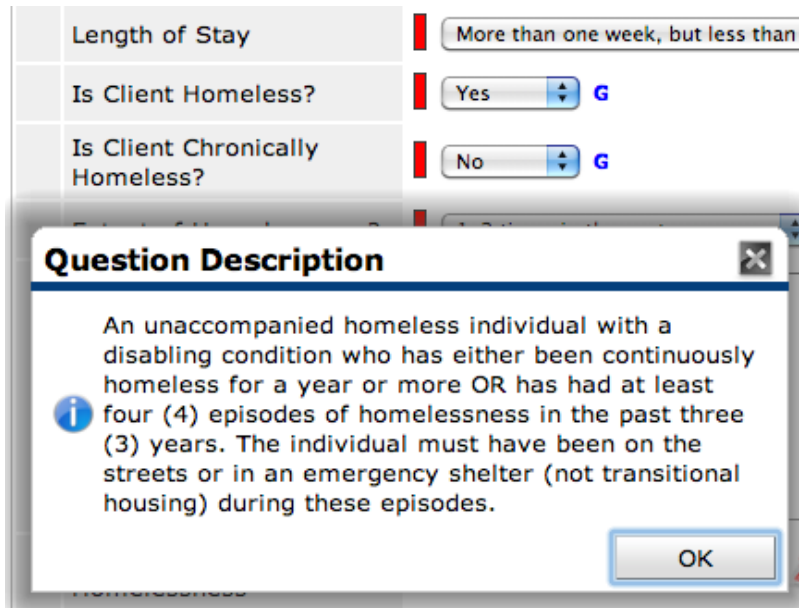


Figure 1-12

***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.

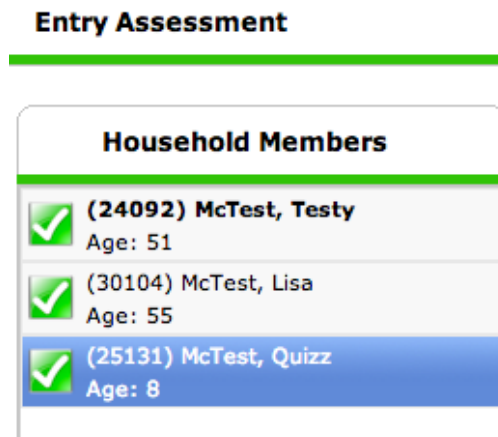
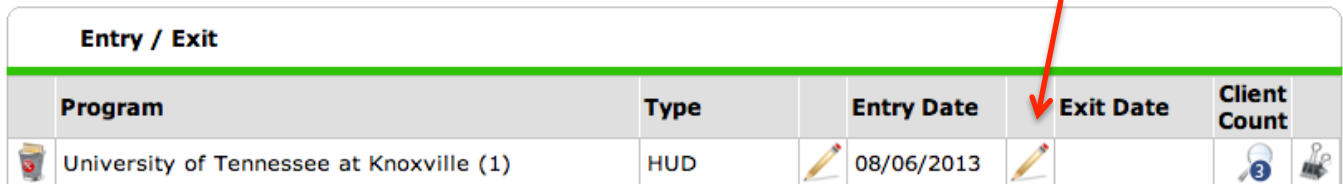


Figure 1-13

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

STEP 5: Creating a program EXIT

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.








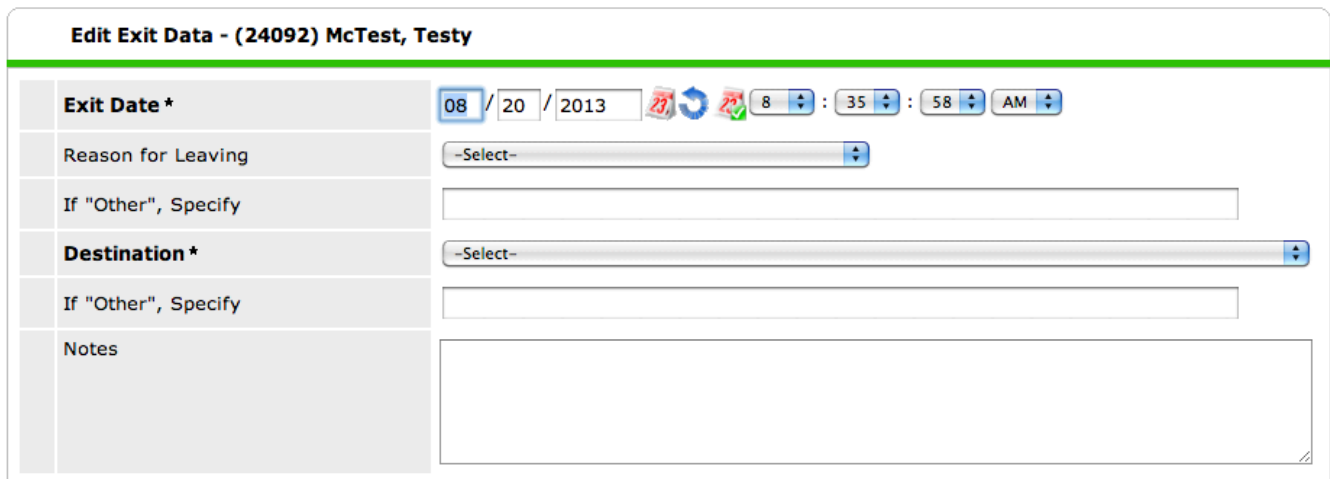
Entry / Exit					
Program	Type	Entry Date	Exit Date	Client Count	
 University of Tennessee at Knoxville (1)	HUD	 08/06/2013		 3	

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.”



Edit Exit Data - (24092) McTest, Testy




Exit Date *	08 / 20 / 2013    8 : 35 : 58 AM
Reason for Leaving	-Select-
If "Other", Specify	<input type="text"/>
Destination *	-Select-
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

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.

The screenshot shows a software interface with two tabs: 'Entry Assessment' and 'Exit Assessment'. A red arrow points to the 'Exit Assessment' tab. The interface is divided into several sections:

- Household Members:** A sidebar on the left containing a list of household members with checkboxes and age information:
 - (24092) McTest, Testy, Age: 51 (checked)
 - (30104) McTest, Lisa, Age: 55 (checked)
 - (25131) McTest, Quizz, Age: 8 (checked)
- Household Data Sharing:** A section containing:
 - Client:** (24092) McTest, Testy
 - HUD-40118** (ID)
 - Exit Date:** 08/20/2013 08:35:58 AM
 - Case Manager Table:**

	Primary CM?	First Name	Last Name	Agency	Phone	Start Date *	End Date
	No	Lisa	H	Focus Group ETREC		08/06/2013	
	No	C	Ensley	KnoxHMIS	374-232-1432	07/10/2013	08/14/2013
	No	S	West	KnoxHMIS	4-9142	05/01/2010	04/12/2011
	Yes	Casey	Managero	Helping Test Clients		04/13/2011	07/09/2013

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