

Move a Client to Housing from the Coordinated Entry Priority List (entry/exit method w/VI-SPDAT)

Step One: Enter Data As (EDA) your CoC's Coordinated Entry provider

Log in to ServicePoint and click the Enter Data As option in the upper right corner of your screen.

ServicePoint
Connecting Your Community

Kane County Development Department
Public Action to Deliver Shelter, Inc.
January 22, 2018

Mode: ShadowCCOX
Enter Data As
Back Date
Connect To ART

Home > Home Page Dashboard

Type here for Global Search

System News (5)

Date	Headline
01/08/2018	Data Quality Training on January 22nd
01/02/2018	New User Training - January 5th
12/06/2017	Data Quality Training Schedule
10/03/2017	Updated Release of Information
10/01/2017	Details - HMIS Data Standards Changes

Agency News (0)

Follow Up List (2)

Client ID	Type	Date	Time Remaining
14150	Goal	01/21/2018	Past
11193	Goal	04/10/2018	78 Days

Counts Report

Clients Currently Checked Into A Shelter:	Clients With An Entry But No Exit:
36	51
Shelter Stays Provided:	Clients Served:
179	186

The Enter Data As Provider Search pop-up appears. Search for your CoC's Coordinated Entry provider and once search results appear, click the green action wheel with the plus sign next to the Coordinated Entry provider's name.

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Mode: ShadowCCOX
Enter Data As
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Home > Home Page Dashboard

Type here for Global Search

Enter Data As Provider Search

Provider Search
Search for Providers by using keywords from the Provider Name or Description.
Search: coordinated entry
Show Advanced Options

Provider Number
Enter or scan a Provider ID number to search for that Provider.
Provider ID #: Submit

Provider Search Results

Provider	Level	Phone	Location	Last Updated
Kane County Coordinated Entry (31)	Level 3	Unknown	Unknown	01/18/2018

Showing 1-1 of 1

Exit

HOW TO...

Check to make sure that the Coordinated Entry provider's name appears next to "Enter Data As" in the upper right corner of your screen.

The screenshot shows the SERVICEpoint Home Page Dashboard. The top navigation bar includes the SERVICEpoint logo, the department name "Kane County Development Department", and the user "Kane Admin". The dashboard is divided into several sections: "System News (5)", "Agency News (0)", "Follow Up List (0)", and a "Counts Report". The "Counts Report" section displays the following data:

Clients Currently Checked Into A Shelter:	Clients With An Entry But No Exit:
36	51
Shelter Stays Provided:	Clients Served:
179	186

Note: to ensure that the Priority List is accurate, you must enter Coordinated Entry referrals into HMIS on the day that they occur. Should you ever need to do data entry after the fact, remember to click the Back Date link in the upper right of your screen and select the date when the client was interviewed.

Step Two: Search for a Client

Perform a search for the person you are referring to housing. Click on the ClientPoint menu item, then enter part of the person's name in one or more of the fields in the search form that appears. After entering this information, click the Search button.

The screenshot shows the SERVICEpoint Client Search form. The left sidebar has the "ClientPoint" menu item circled in blue. The main form area is titled "Client Search" and contains the following fields:

- Name: First, Middle, Last (pre-filled with "fabeezt"), Suffix
- Name Data Quality: -Select-
- Alias: [Text Field]
- Social Security Number: [Text Field]
- Social Security Number Data Quality: -Select-
- U.S. Military Veteran?: -Select-
- Exact Match: ☐
- Date of Birth: [Text Field]
- DOB Data Quality: -Select-
- Gender: -Select-
- Primary Race: -Select-
- Secondary Race: -Select-
- Ethnicity: -Select-

At the bottom of the form, there are buttons for "Search", "Clear", and "Add New Client With This Information". The "Search" button is circled in blue. Below the search form, there is a section for "Client Number" with a "Client ID #" field and a "Submit" button.

HOW TO...

Select the client from the Client Results list.

Please Search the System before adding a New Client.

Items in *Italics* are for Data Entry *ONLY* and will not be used for Search Results.

Name: First Middle Last Suffix

Name Data Quality: Date of Birth: / /

Alias: DOB Data Quality:

Social Security Number: - - Gender:

Social Security Number Data Quality: Primary Race:

U.S. Military Veteran?: Secondary Race:

Exact Match: ☐ Ethnicity:

Search Clear Add New Client With This Information

Client Number

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

Client ID #: Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
15102	Fabeetz, Fred	***-**-9876	11/01/1975		Male	0	0

Showing 1-1 of 1

Step Three: Record a Referral

Once the Client's record appears, click on the record's Service Transactions tab, then click Add Referrals.

Client - (15102) Fabeetz, Fred

Release of Information: None

Client Information

Service Transactions

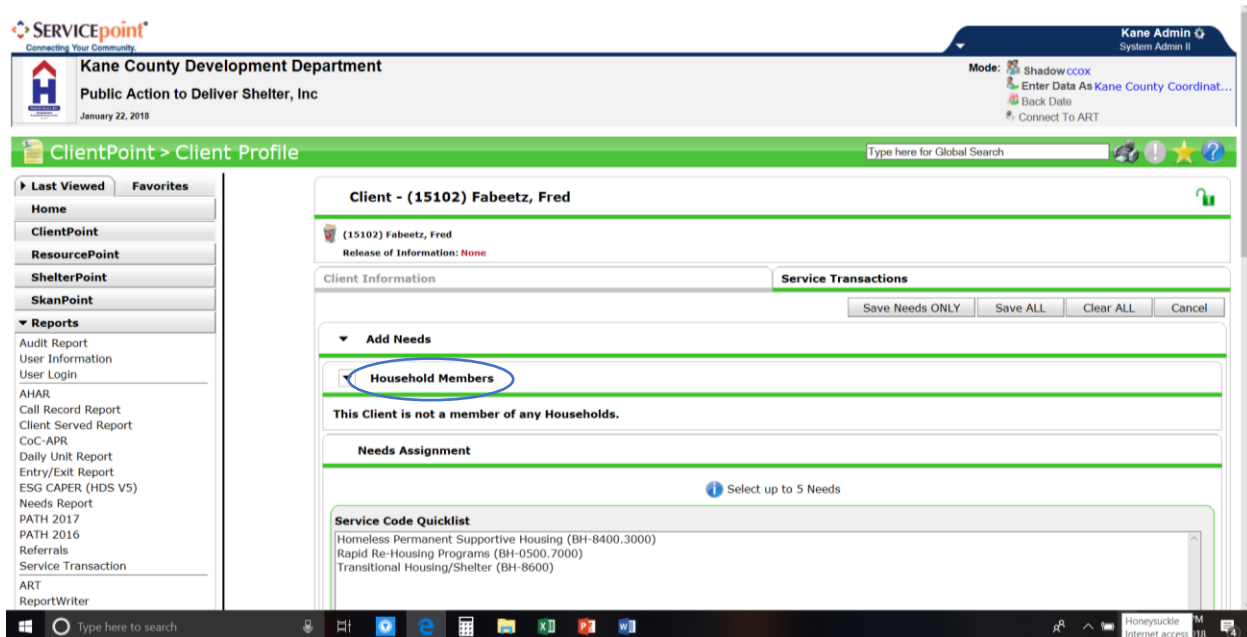
Service Transaction Dashboard

Add Need Add Service Add Multiple Services Add Referrals View Previous Service Transactions

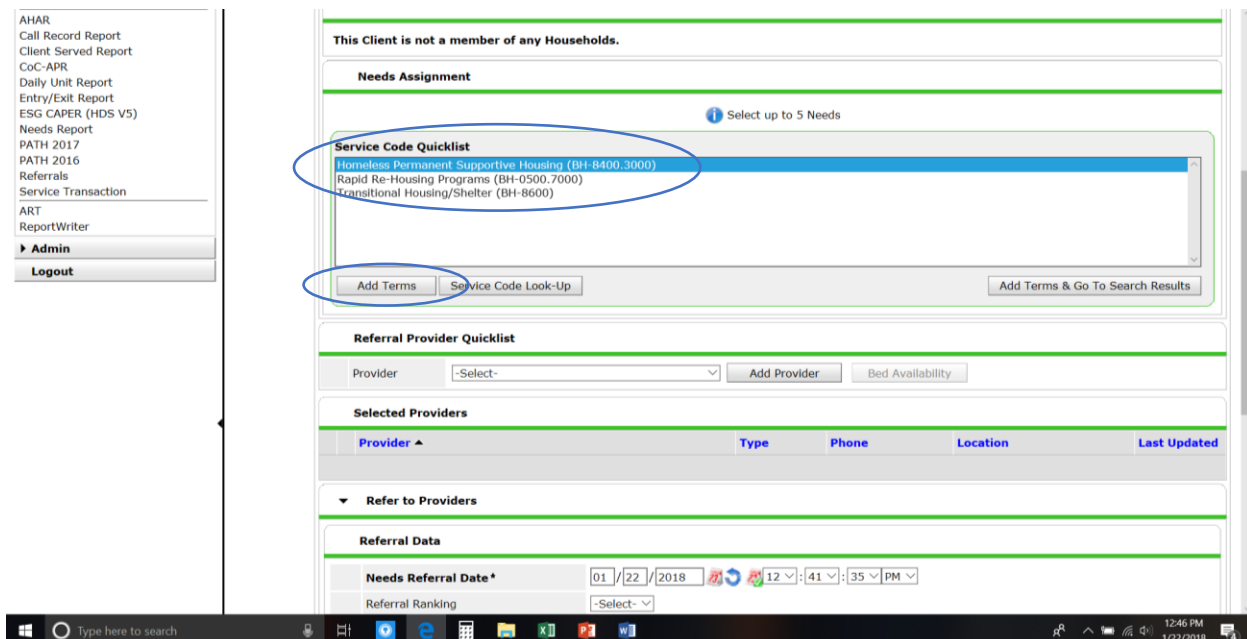
View Shelter Stays View Entire Service History

HOW TO...

The Client Services Transactions page appears. If the client is part of a multi-member household, go to the Household Members section of the page and select the people who are also being referred the current housing opportunity.



Next, go to the Needs Assignment section of the page and from the Service Code Quicklist, select the type of housing placement that the Client will receive, then click Add Terms.



HOW TO...

From the Referral Provider Picklist, select the agency that will provide housing to the Client, then go to the Needs Referral Date field and enter the date the referral is being made.

Referral Provider Quicklist

Provider: -Select- Add Provider Bed Availability

Selected Providers

Provider	Type	Phone	Location	Last Updated
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Refer to Providers

Referral Data

Needs Referral Date* 01/22/2018 12:41:35 PM

Referral Ranking: -Select-

Projected Follow Up Date: -Select-

Follow Up User: Kane County Coordinated Entry (131) -Select- Search My Provider Clear

☐ Check to notify ServicePoint Providers by Email.

Referrals Send Summary

Referred-To Provider

Need Data

In the Referrals section near the bottom of the page, check the box in the center column that applies to each of the referrals you are making to your agency. The referral will not be saved if this box is not checked.

Needs Referral Date* 01/22/2018 12:55:08 PM

Referral Ranking: -Select-

Projected Follow Up Date: -Select-

Follow Up User: Kane County Coordinated Entry (131) -Select- Search My Provider Clear

☐ Check to notify ServicePoint Providers by Email.

Referrals Send Summary

Referred-To Provider	Homeless Permanent Supportive Housing	Referred Clients
360 Youth Services Kane County (13)	<input checked="" type="checkbox"/>	(15102) Fabeetz, Fred

Need Data

Date of Need* 01/22/2018 12:55:08 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Homeless Permanent Supportive Housing (BH-8400.3000)		Identified -Select-	

Remove All Needs

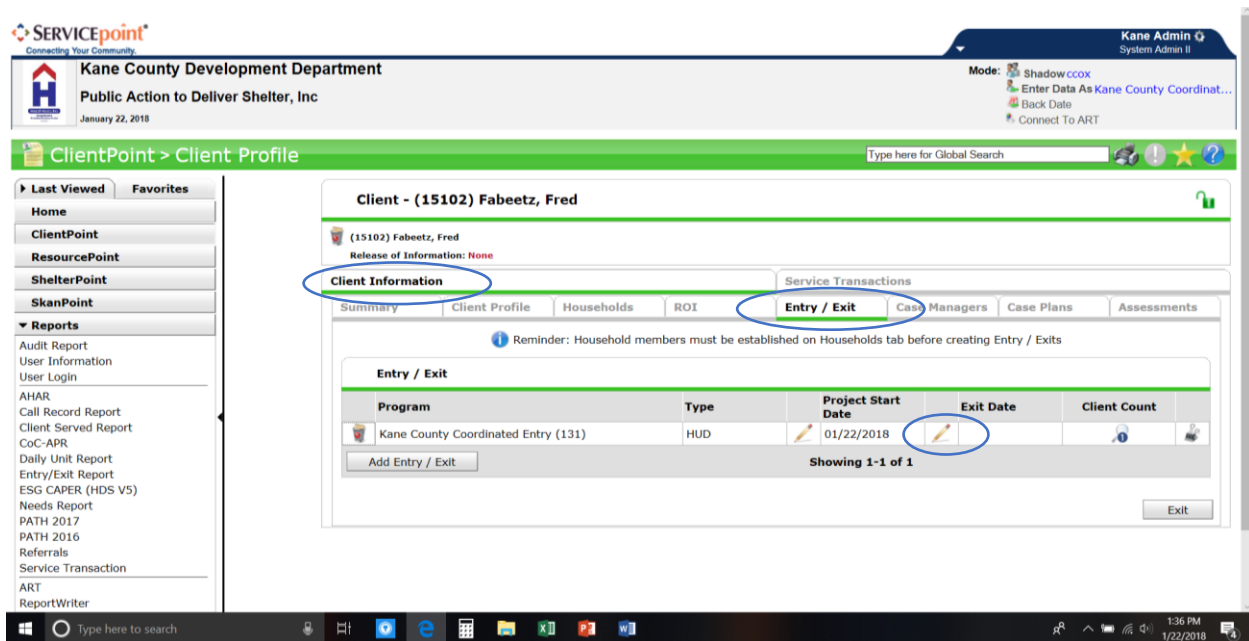
Save Needs ONLY Save ALL Clear ALL Cancel

All other fields on this page are optional; you do not have to fill them out. When you are finished entering data, go to the bottom of the page and click the Save ALL button.

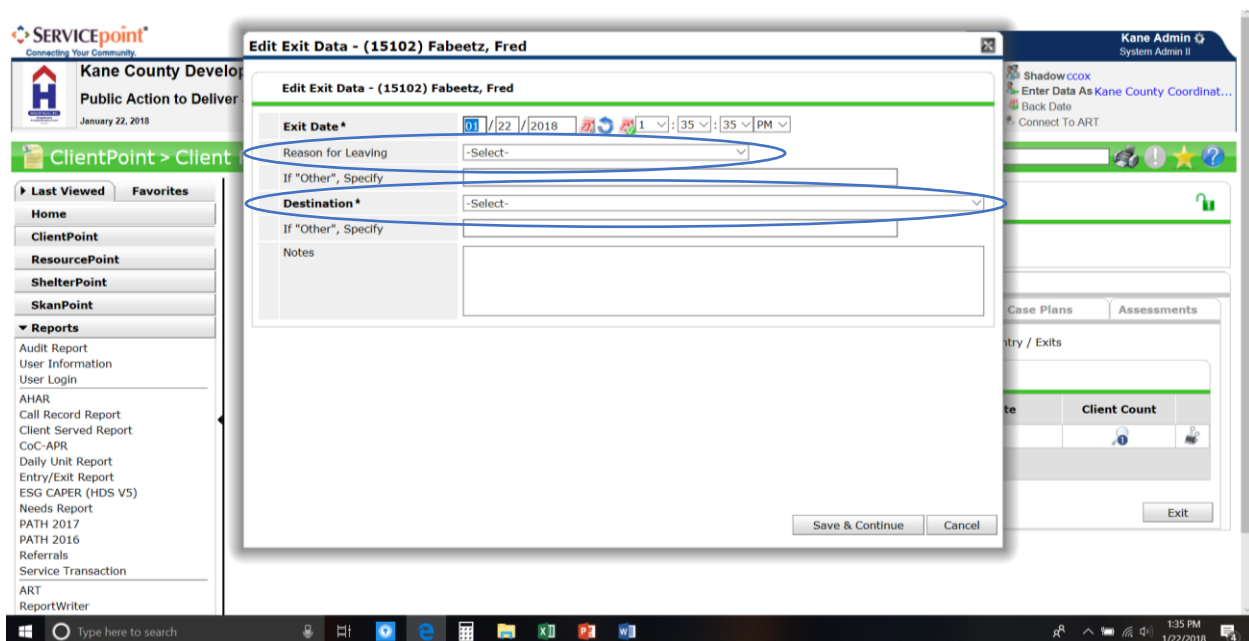
HOW TO...

Step Four: Discharge the Client from the Coordinated Entry provider (program)

Click the Client information tab near the top of the page, then click the Entry/Exit sub-tab. Finally, click the edit pencil under Exit Date.



The Edit Exit Data pop-up appears. Verify that the Exit Date is correct (change if needed), and select Reason for Leaving, and Destination. Then click the Save and Continue button.



The pop-up refreshes. Click the Include Additional Household Members button if other family members are being placed in housing with the client and select those people from the list that appears.

HOW TO...

Now go to the bottom of the page and click the Exit button. The exit process for Coordinated Entry is complete and the Client has been removed from the CoC's Priority List.

The screenshot displays the Servicepoint ClientPoint interface. The top header shows 'Kane County Development Department' and 'Public Action to Deliver Shelter, Inc.' with the date 'January 22, 2018'. The left sidebar contains a navigation menu with options like 'Home', 'ClientPoint', 'ResourcePoint', 'ShelterPoint', 'SkanPoint', and a 'Reports' section with various report types. The main content area is titled 'Entry/Exit Data' and includes a note about provider changes. Below this, there are fields for 'Provider*' (Kane County Coordinated Entry (131)) and 'Type*' (HUD), with 'Search', 'My Provider', and 'Clear' buttons. A table titled 'Household Members Associated with this Entry / Exit' shows one member: (15102) Fabeetz, Fred, with project start and exit dates of 01/22/2018, and a reason for leaving of 'Completed program'. Below the table, there are sections for 'Entry Assessment' and 'Exit Assessment'. The 'Exit Assessment' section states 'No HUD Exit Assessment has been specified for this Provider'. On the right side, there is a 'Client Count' section showing a count of 1 for the date 01/22/2018. An 'Exit' button is located at the bottom right of the interface.

Name	Head of Household	Project Start Date	Exit Date	Reason for Leaving	Destination	Notes
(15102) Fabeetz, Fred		01/22/2018	01/22/2018	Completed program	Permanent housing (other than RRH) for formerly homeless persons (HUD)	

Do you have questions about using HMIS for Coordinated Entry? Call the Pathways MISI help desk at 800-536-6474 or visit help.pathwaysmisi.org.