STREET OUTREACH WORKFLOW

SERVICEPOINT 5.11.x

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TERMS

Contact – this is an interaction between a worker and a client. These can be verbal conversations between the worker and client or a referral to a service. Contacts are recorded each and every time a client has an interaction with an outreach worker.

Date of Engagement – this is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.

BACKGROUND

The Street Outreach Workflow starts with the outreach worker meetings with a potential client one or more times prior to engaging them in their project. The report tracks the number of times a client is contacted and the date of engagement for the clients. ServicePoint[tm] provides the following to track that data:

- **Outreach** subassessment

  - This sub-assessment is used to record each Contact with the client.

  - This subassessment contains entries for the Date of Contact, Time (optional), Location, Start Date and End Date (optional).

  - The date of the first Contact is the same as the Entry/Exit start date.

  - Each Contact after the first Contact must be added using Interim Review workflow.

- Date of Engagement

  - This is the date that the client agreed to engage in the service offering.

  - There should only be one Date of Engagement per project stay. If there are multiple Dates of Engagement recorded only the last one is used for reporting.

  - If a client does not become engaged, no date needs to be recorded.

  - The Date of Engagement "stops" the count of Contacts for a given client.

Following the recommended workflow will ensure that data are entered into ServicePoint for reporting purposes and those users are compliant with the requirements outlined in the 2014 HMIS Data Dictionary.

IMPORTANT
This Street Workflow document is not to be used for RHY or PATH Providers. Please see *Workflow for PATH Projects* document for PATH providers.

PROVIDER CONFIGURATION

A separate provider should be created for each Street Outreach project. The Street Outreach provider should be used exclusively for recording the Contacts (using Outreach sub-assessment), Date of Engagement, Services and Referrals provided by the project for all clients.

- **Required HUD Standards Information tab settings are as follows:**
  - Record appropriate HUD Standards Information for the project.
  - In order to pull into the HUD CoC APR, the provider must have a Project Type of **Street Outreach (HUD)**.

- **Recommended Services tab settings are listed as follows:**
  - Service Setting > Service Quicklist – set-up service codes that are appropriate for this Street Outreach Provider. This list should include **Outreach Programs**.
  - Service transactions are optional for ESG and CoC funded projects.

- **Required ClientPoint Module Settings are as follows:**
  - Entry/Exit Settings > Use Entry/Exit Interim and Follow Up Reviews – this setting must be check marked in order to appropriately display assessments and record Update information.

- **Recommended Assessment display tab settings are listed as follows:** (see Figure 1)
  - HUD CoC and ESG Entry should be set to **Show on HUD Entry**.
  - HUD CoC and ESG Update should be set to **Show on HUD Interim Review**.
  - HUD CoC and ESG Exit should be set to **Show on HUD Exit**.

Show on HUD Entry	HUD CoC and ESG Entry
Show on HUD Interim Review	HUD CoC and ESG Update
Show on HUD Exit	HUD CoC and ESG Exit

Figure 1

IMPORTANT
An implementation may choose to use their own assessment. If so, it is their responsibility to make sure the necessary data are being collected for proper reporting.

STREET OUTREACH WORKFLOW

Bowman Systems recommends the following workflow for Street Outreach data entry into ServicePoint. Complete data entry will maximize the reporting capability for the HUD CoC APR and any other required reports as well.

Initial Meeting with Client

This is the initial point of contact with the potential client. In essence it involves capturing the client's basic information before they officially enter the project.

- ❖ **Step One: Create Client Profile**
  - ❖ Make sure to search for the client to insure they don't already exist first prior to creating client profile. If client already exist click the pencil next to the client's name to go into client's record. (See Figure 2)

	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
✏ 🧑	85	Client, Homeless	909-87-8800	09/01/1964		Male		1 🔍

Figure 2

  - ❖ If necessary go into backdate mode.
  - ❖ Then enter profile information. See *ClientPoint Workflow*, for instructions to create a household, if necessary.
- ❖ **Step Two: Obtain and Record ROI** (Optional)
  - ❖ Click on the **ROI** tab and click **Add Release of Information** to generate an ROI. (See Figure 3)

☑ (85) Client, Homeless

Release of Information Data

Provider*	Homeless Outreach (42) ▼
Release Granted*	Yes ▼
Start Date*	10 / 01 / 2014
End Date*	10 / 01 / 2015
Documentation	Signed Statement from Client ▼
Witness	

Save Release of Information   Cancel

Figure 3

- ❖ **Step Three: Create Project Entry**
  - ❖ Record **Entry Date** with the same date as the First Date of Contact.
  - ❖ Project Entry Type should be **HUD**. (See Figure 4)

Figure 4

❖ Time stamp of project Entry Date must be prior to first date of contact for the contact to be counted correctly.

❖ Record all known **Universal Data Element**'s at project entry.

❖ Make sure to record the first **Date of Contact** information. (See Figure 5)

Figure 5

Update Client's Information as relationship develops

As the Outreach Worker's relationship with the client develops, the user can update the client's profile with data elements as they become available. Include all Contacts with the client in this process. It may be beneficial to use the Entry Assessment at Update to include all of the Entry questions for this process. Contacts should be recorded up until the point the client becomes engaged with the Outreach Worker.

❖ **Step Four: Create an "Update" using Interim Reviews**

   ❖ To add an updates, click **Interims** for the existing project entry. (See Figure 6)

Entry / Exit							
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count	
🗑 Homeless Outreach (42)	HUD	✏ 10/01/2014	✏	💥	📋	🔵	🖌

Figure 6

   ❖ **Add Interim Review** and then choose **Update** type.

Interim Reviews   ⊠

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

Figure 7

   ❖ The user should add additional Contacts using the **Outreach** sub-assessment, and update other data elements as required. (See Figure 8)

Add Recordset - (85) Client, Homeless   ⊠

Outreach

Date of Contact	10 / 15 / 2014 📅🔄📅 8 ▼ : 00 ▼ : 00 ▼ AM ▼ G
Start Date *	10 / 15 / 2014 📅🔄📅 G
Location	Place not meant for habitation ▼ G
End Date	10 / 15 / 2014 📅🔄📅 G

Save   Save and Add Another   Cancel

Figure 8

<table>
<tr><td colspan="2" align="center">♦   **IMPORTANT**</td></tr>
</table>

At this point the user may do the following:

1) Repeat **Step 4** using the Interim Review type of **Update** to record additional Contacts with the client for every contact after the initial contact and updating client information. This process continues until the client reaches the Engagement stage.
2) The user may create service transactions, if applicable. See alternative **Step 5**.
3) Once the client is Engaged with the Outreach Worker, continue to **Step 6**.

Provide and document Services for the client

Service transactions records and additional information can be added at any time after the client has entered the project before the client had exited the project. For example, the Outreach Worker can create an outreach service to track the service provided to the client.

❥ **Step Five: Create Service Transactions**

> ❥ To create a service, do the following while in the client record.

> ❥ On the **Service Transactions** tab select **Add a Service** to access the service transaction screen. (See Figure 9).
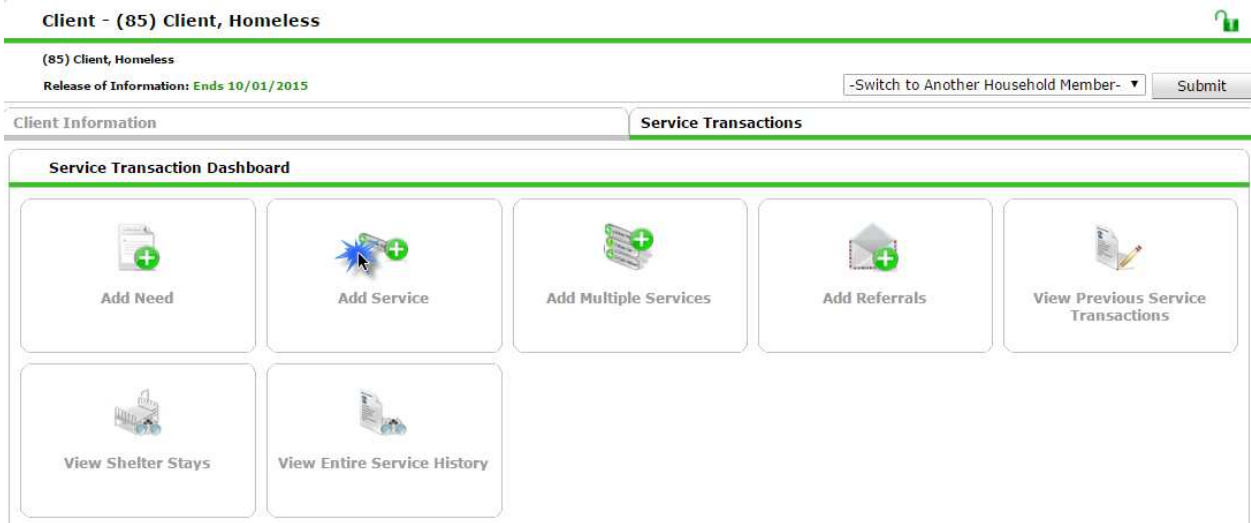
Figure 9

> ❥ Remember to choose the proper street outreach project. Enter a **Start Date** for the Service and select the **Service Type** from the drop-down picklist. (See Figure 10)

Figure 10

❖ The result of the service transaction should look like Figure 11 below.

Figure 11

Client Engaged in Project

Overtime the Outreach Worker and client develop a relationship that leads to an Engagement. Once the client has formally agreed to work with the Outreach Worker then a Date of Engagement can be recorded.

❖ **Step Six: Create "Update" to record Engagement**

  ❖ At this point the user will need to go back into the Interim review and input the **Date of Engagement**. (See Figure 12)

Figure 12

  ❖ The user will also need to record a **Date of Contact** for the same date. (See Figure 13)

Figure 13

Client Exit from the Project

An Exit is created once the client is either not engaged in the outreach project or once the client is housed or declines further services.

> ◆ **Step Seven: Create Exit record**
>
> > ◆ Make sure to close any open services.
> >
> > ◆ Create an **Exit** for the appropriate project Entry by clicking on the pencil. (See Figure 14)

Figure 14

> > ◆ Make sure to indicate the appropriate **Reason for Leaving** and **Destination**.
> >
> > ◆ Complete all required updates and elements.
> >
> > ◆ Be sure to check sub-assessment records for valid types/dates.

WORKFLOW CHECK LIST

✓ Create client profile, if client doesn't already exist in system
✓ Obtain and record ROI (if applicable)
✓ Record Project Entry Date with the same date as the First Date of Contact, record all known UDE's at project entry; Timestamp of project entry must be prior to first date of contact for the contact to be counted correctly.
✓ Record services, if applicable
✓ Record subsequent contacts with client; add UDEs as they become available
✓ Record final contact with client on same date as Date of Engagement; timestamp of final contact must be recorded before Date of Engagement timestamp to avoid missing location contact error.
✓ Record Project Exit

REPORTING

Required Reports for HUD funded projects

◆ 0625 CoC APR – This ART Gallery report has been created to facilitate the extraction of data from HMIS for the completion of the CoC APR. The layout of the report is patterned after the HDX data input screen to facilitate on-line reporting. A companion ART Gallery Report, the #0631, provides several data detail and data quality tabs to assist the user in ensuring that the data to be reported are complete and accurate.

◆ 0631 CoC APR Detail - This ART Gallery report is a companion to report #0625 and displays the record level detail behind the CoC APR summary tables. This CoC APR Detail report consists of several tabs each of which focus on specific portions of the CoC data. Numerous Input Control filters are included which allow the user to focus on specific APR questions/calculations. The report also includes additional features to assist in data quality monitoring including null data flags, identification of non-HUD assessment question values, and a tab that identifies duplicate clients included in the dataset.

◆ ESG CAPER Report – This canned report contains the data needed to complete the CR-65 and Race and Ethnicity sections of the annual ESG CAPER report.

VERSION HISTORY

Date of Revision	Document Version #	Revision Notes
2012/10/09	V01	First Release of Document
2014/11/11	V02	Second Release of Document updated to 2014 HMIS Data Dictionary