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Collaborate. Coordinate. Evaluate.

ClientPoint Data Entry Workflow

ServicePoint v5.x

SERVICEpoint™

Connecting your community.

ServicePoint Training Site

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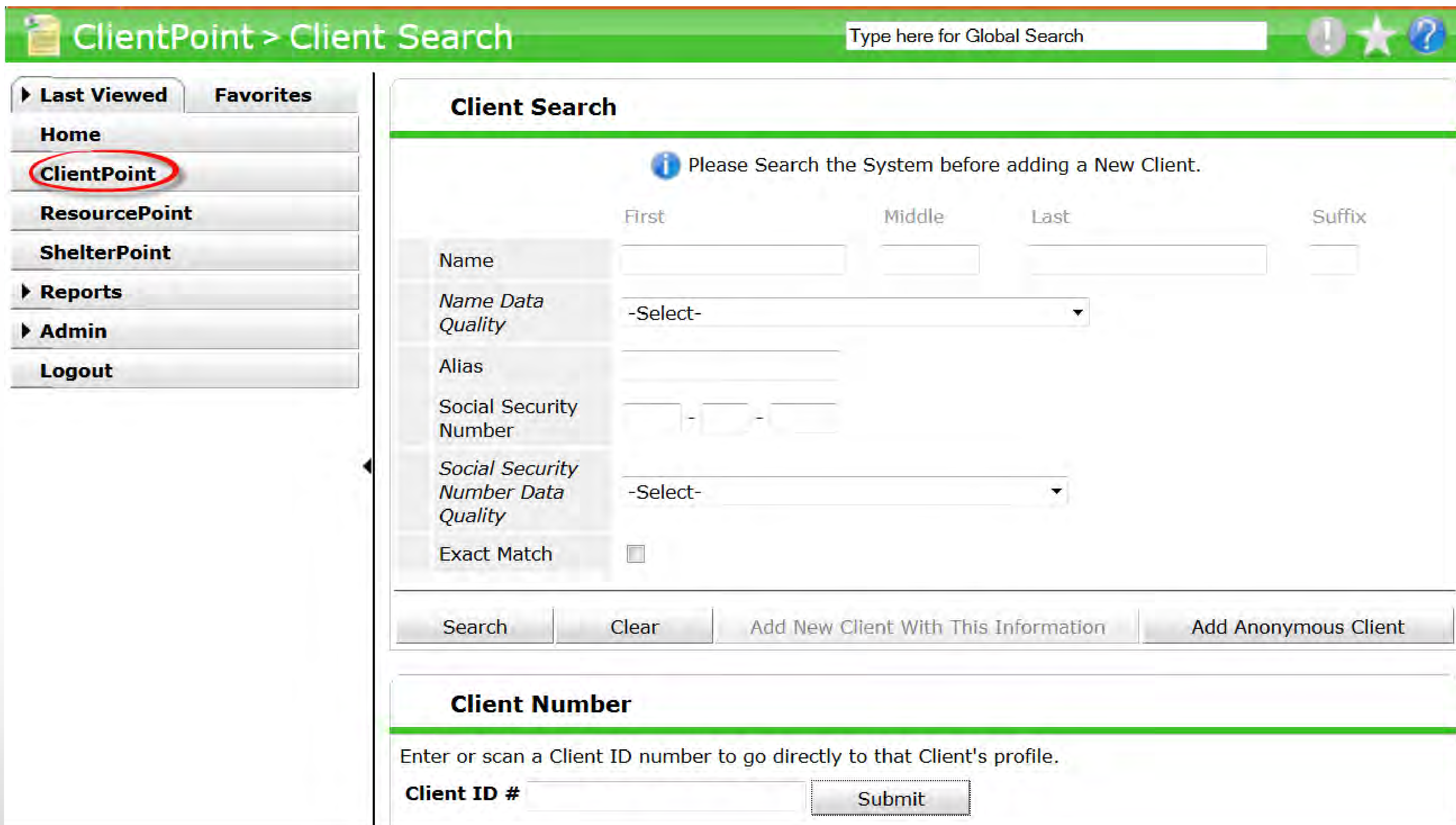
ClientPoint

“The filing cabinet!”



Connecting Communities > Demonstrating Outcomes™

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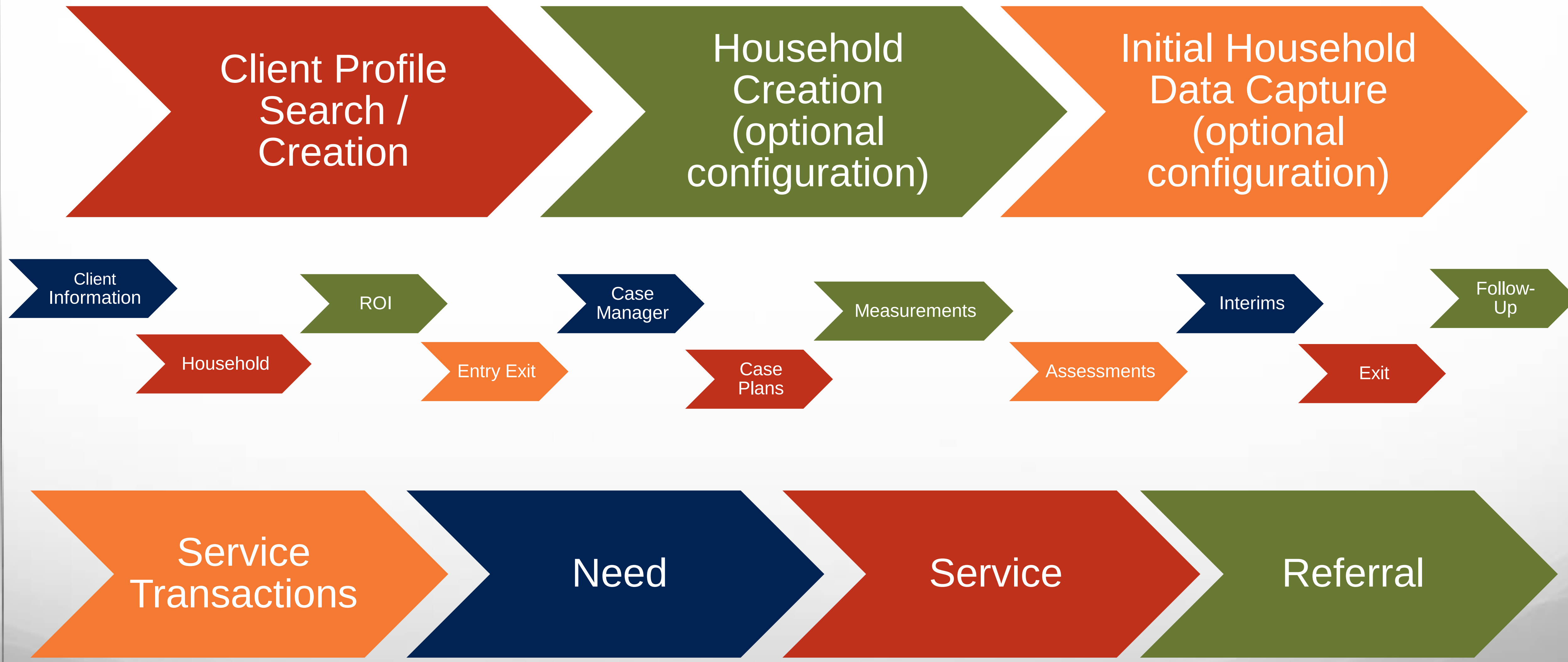
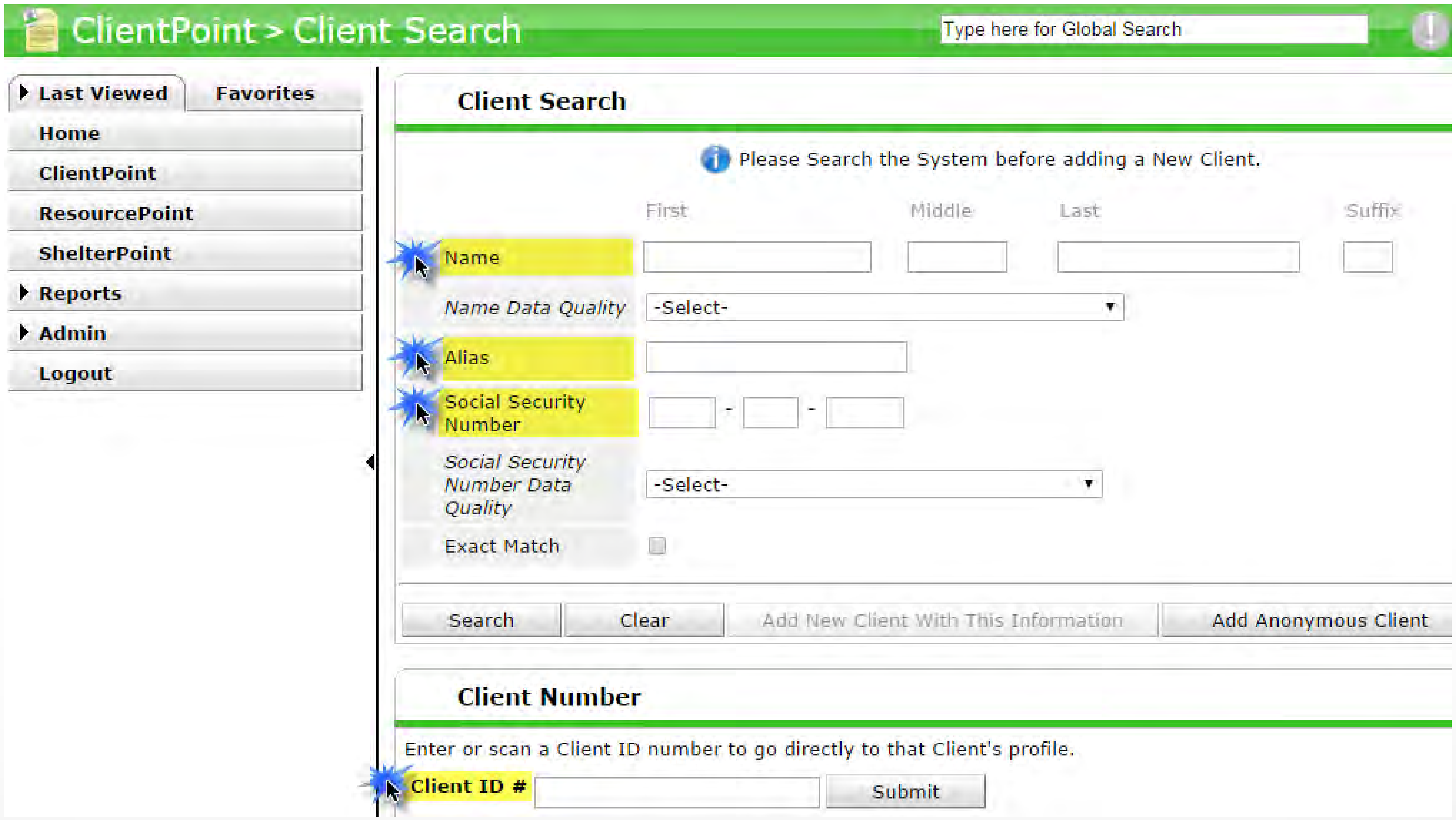
Data Entry Made Easy!

Follow the prompt/pop-up window, then follow the tabs through the record (from left to right).



Client Profile Search / Creation



- Search for your Client Record via the Name(s), Alias, SSN, or Client ID Number field(s).

Note: The system will not allow adding a new client until you click "Search" first.

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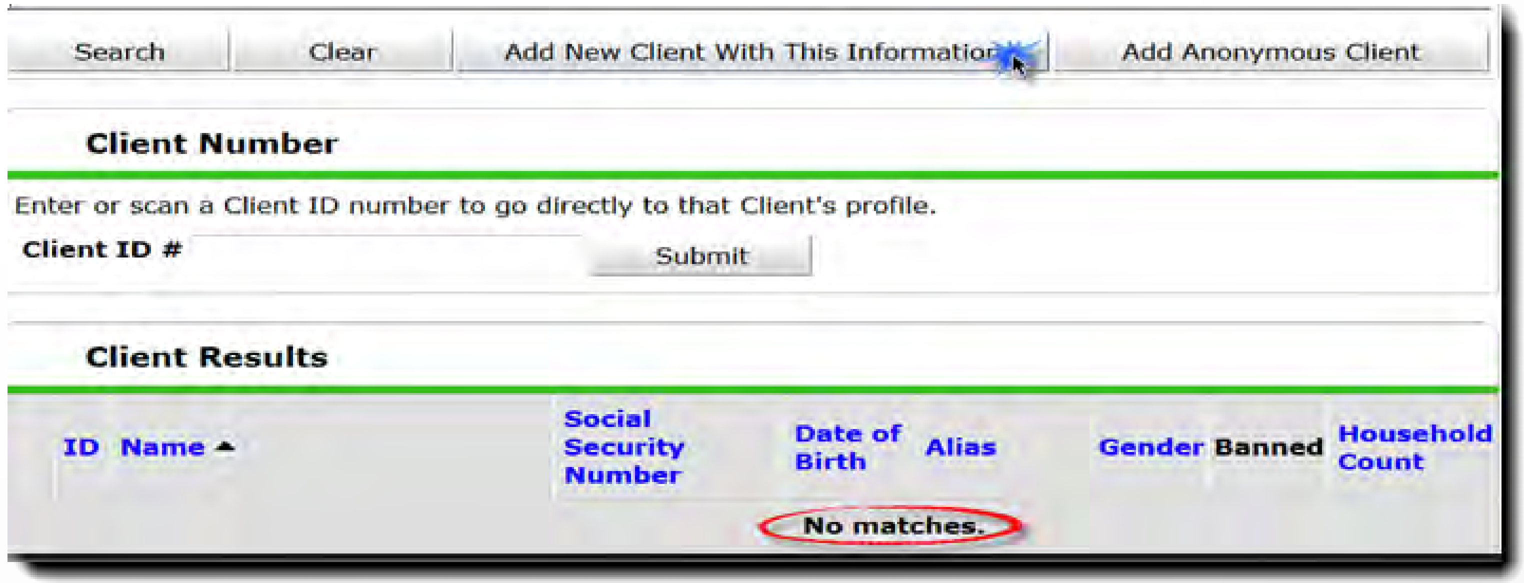
Client Profile Search / Creation

Matching Client Records will be listed under the “Client Results” section (at the bottom of the page).

➢ If a matching record exists, click the pencil/edit icon to the left of the Client’s Name (and skip the next slide).

➢ If no match exists, create a new file folder for the client by clicking on the “Add New Client With This Information” button to create a new Client Profile.



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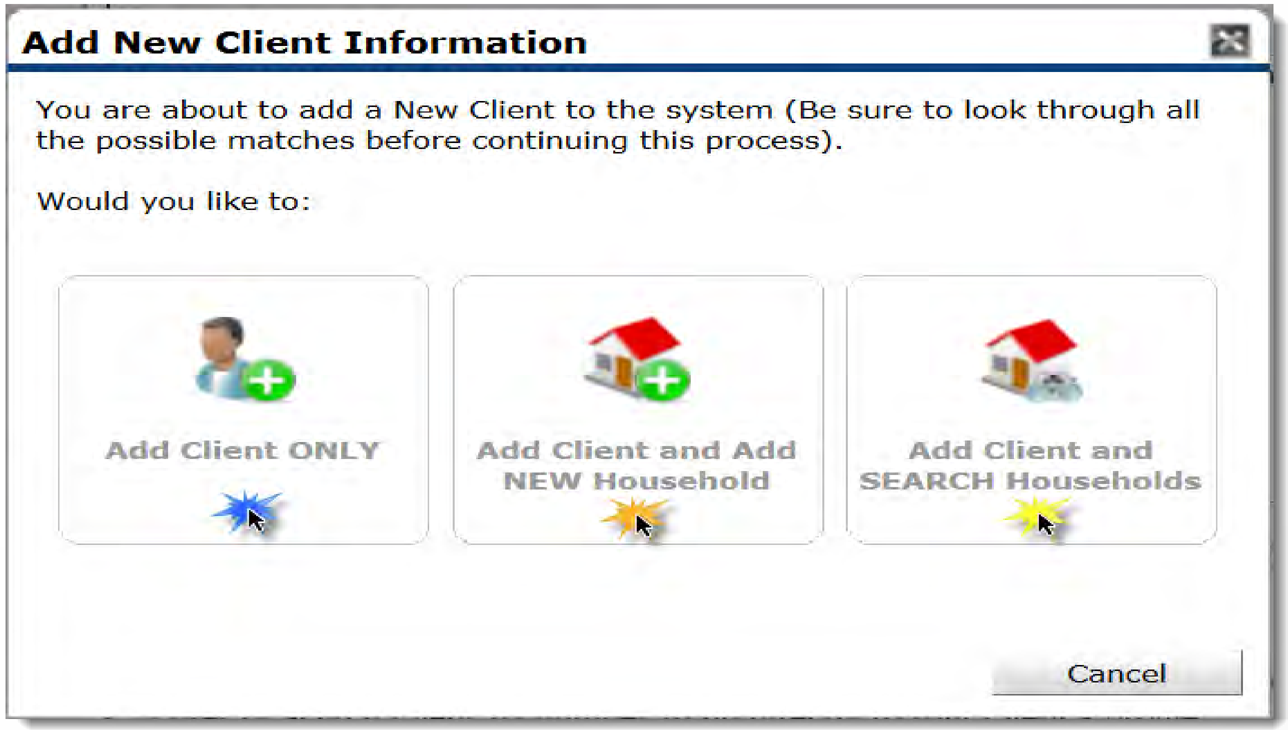
Client Profile Search / Creation

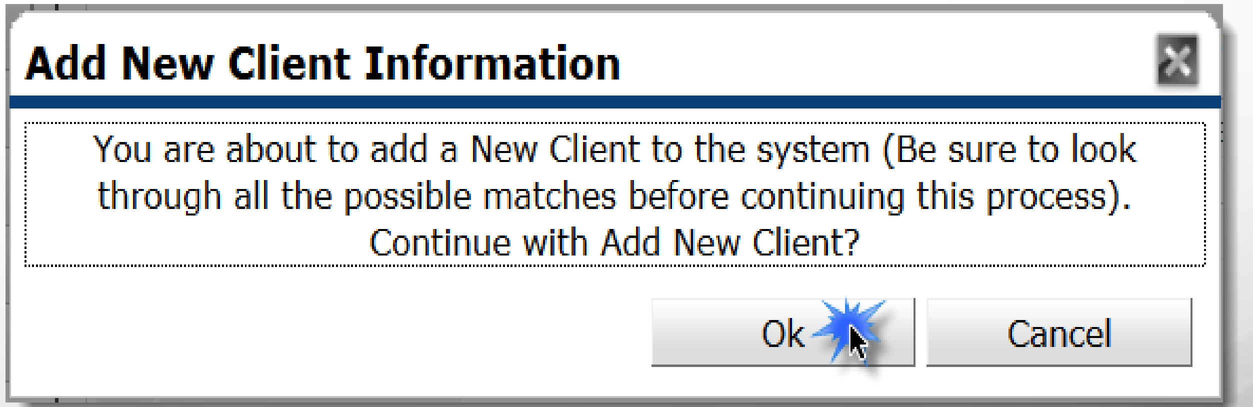
You may see this pop-up display:

- ➢ Click on the appropriate button depending on if you are entering a single or household.
- ➢ Skip to Slide 11, the Household Section, if selecting the middle "Add NEW Household" button



If Add Household Option is not set-up:

➢Click Okay in the "Add New Client Information" pop-up.

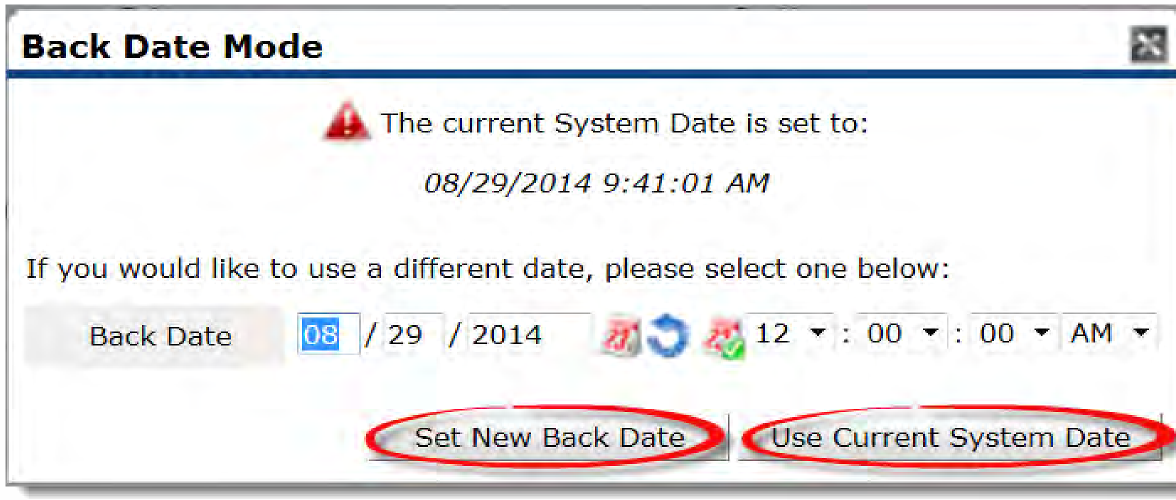


Note: The Household Option can be set in the Provider Admin->Module Settings ->ServicePoint Settings

Client Profile Search / Creation

Back Date allows the user to enter client and assessment information for a date prior to the current date.

- If the back date prompt is turned on in your system, the "Back Date Mode" pop-up will display before you can enter into the client record.
  - If back-dating, change the date and then click Set New Back Date. If not back-dating, just click the Use Current System Date button.



Note: To turn the pop-up on or off, go into provider admin->Module Settings-> ClientPoint

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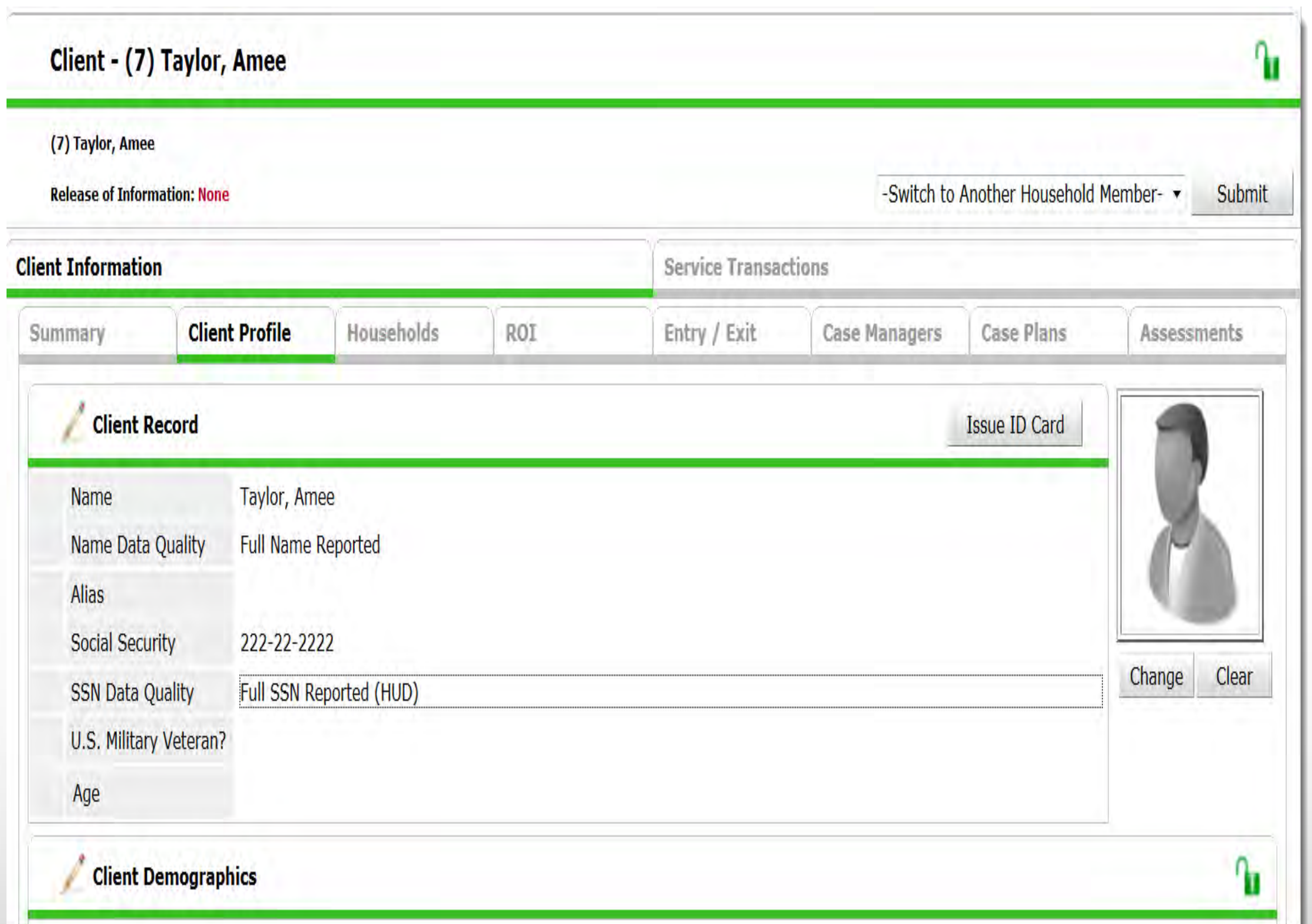
Client Information

"Client Information Tab"

Depending on the implementation settings, once in a client record there are various options on which tab is the default so if the Client Profile is not active, click on it to start there.



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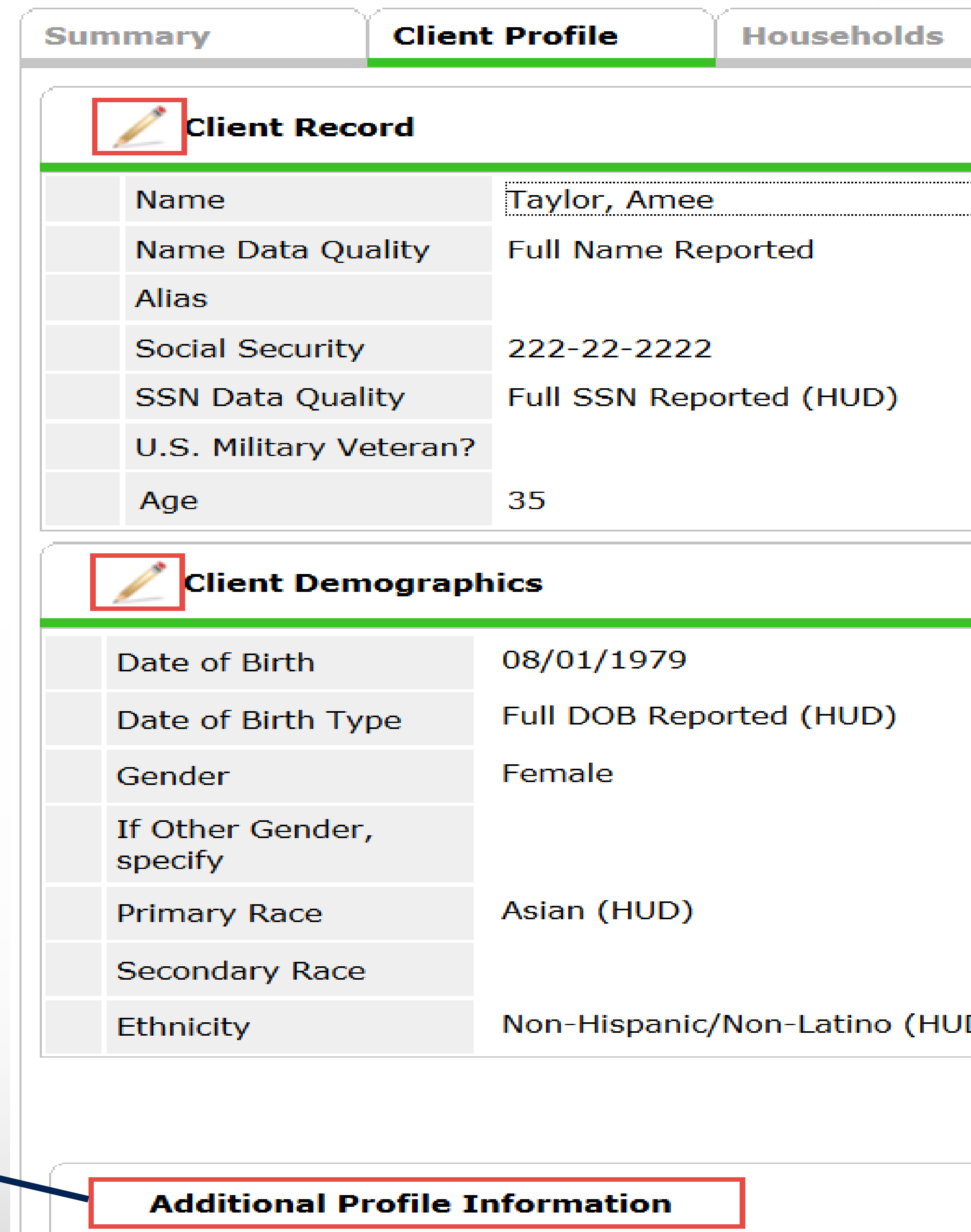
Client Information

- Click the pencils (edit button) to add, edit or update.

Note: These data elements create the client's unique ID. Altering this data could alter the Unique Identifier for reporting in the database.

- Custom Assessment fields may need to be completed.



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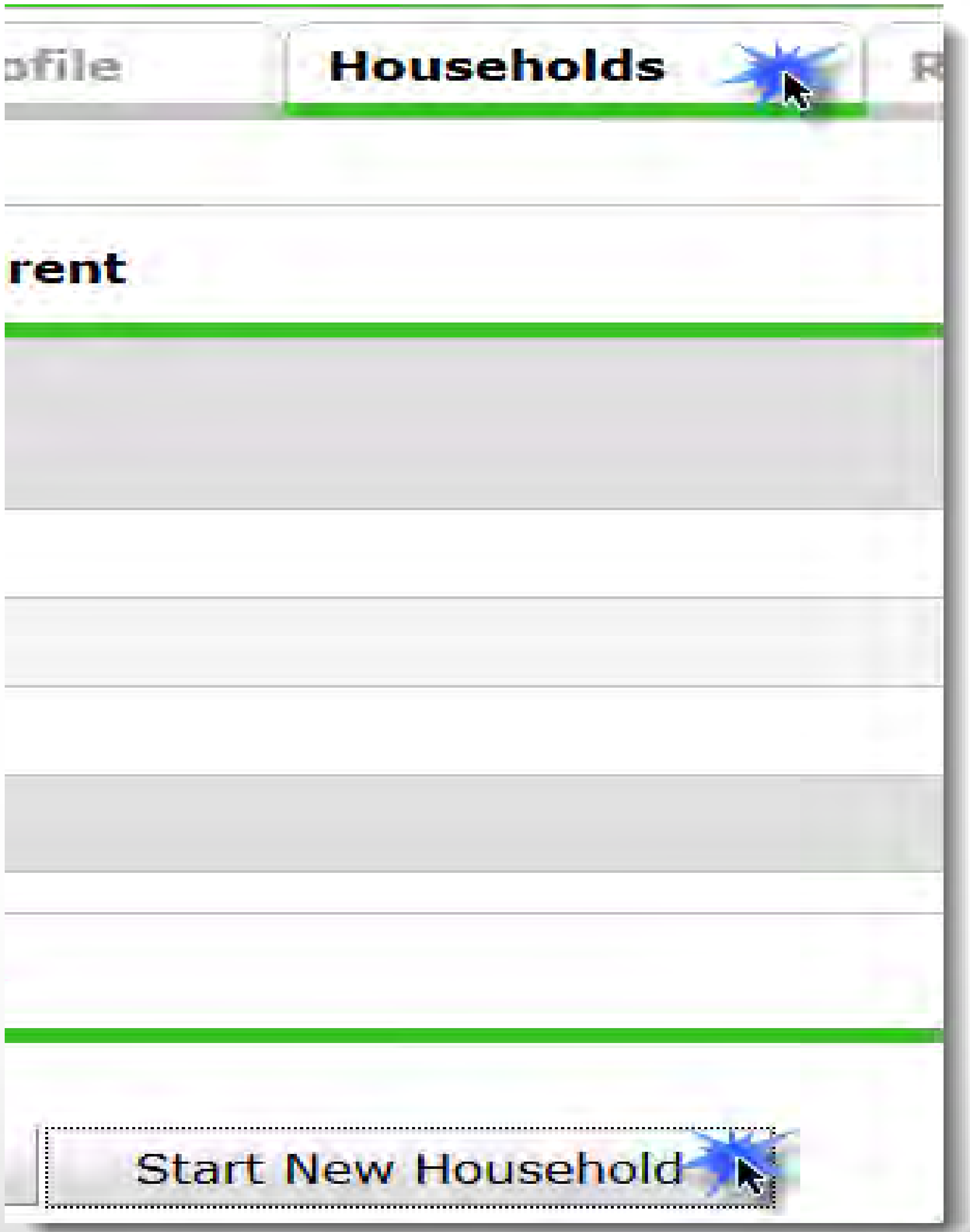
Household Creation

To Add a New Household:

- Click the Household Tab
- Click Start New Household



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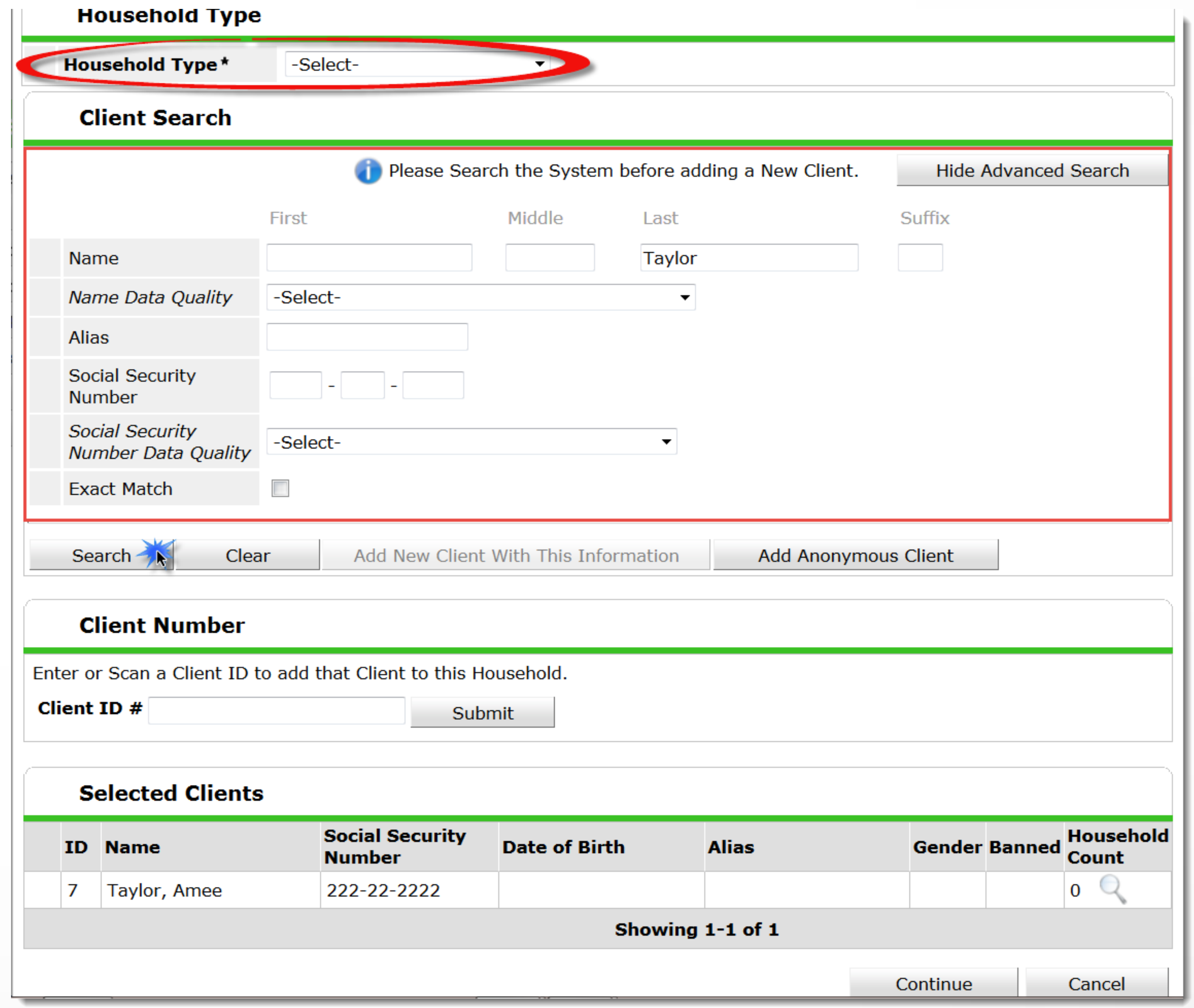
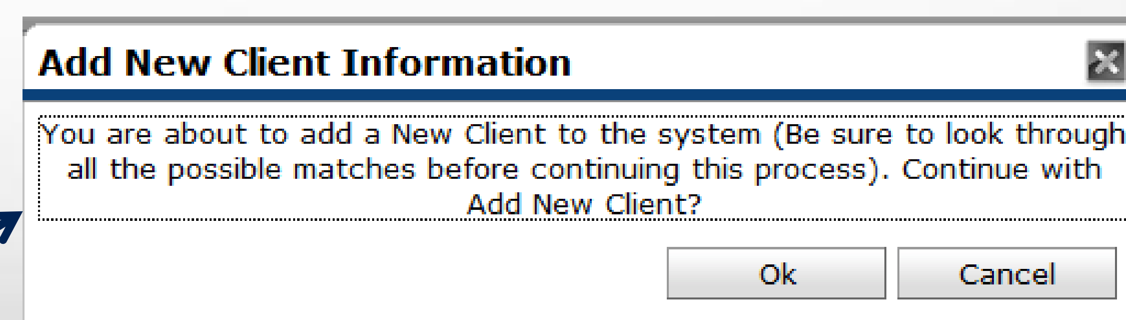
Household Creation

Each household member needs to have a separate client record created and this household area is like a virtual paperclip connecting each file as a household.

- When the Household Pop-Up displays, select the Household Type
- Search for each additional household member.
  - If the additional household member does not already exist in the database, click "Add New Client With This Information"
- *This pop-up may display each time you add a new record.*





Household Creation

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Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
7	Taylor, Amee	222-22-2222					0
8	Taylor, Ameelita	985-58-8877					0
9	Taylor, Ameeon	333-33-3333					0

Showing 1-3 of 3

Continue Cancel

- ➢Clients added to the household will appear at the bottom of the page under the "Selected Clients" section.
- ➢Click "Continue" button once all household members have been added to the group.

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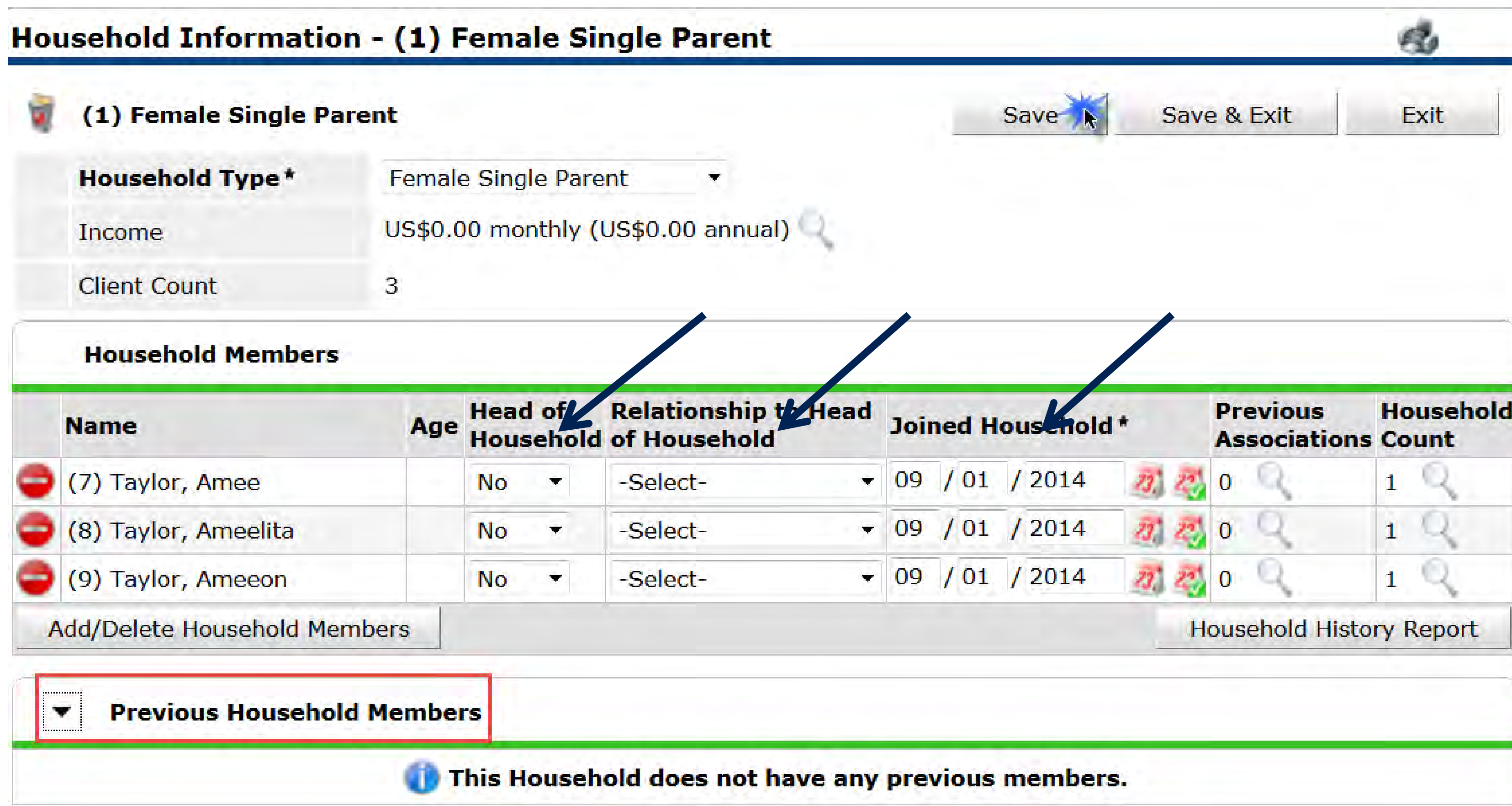
Household Creation


Household Information - (1) Female Single Parent

(1) Female Single Parent — Save | Save & Exit | Exit

Household Type *	Female Single Parent
Income	US$0.00 monthly (US$0.00 annual)
Client Count	3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(7) Taylor, Amee		No	-Select-	09 / 01 / 2014	0	1
(8) Taylor, Ameelita		No	-Select-	09 / 01 / 2014	0	1
(9) Taylor, Ameeon		No	-Select-	09 / 01 / 2014	0	1

Add/Delete Household Members | Household History Report

Previous Household Members

This Household does not have any previous members.

- Complete:
    - **Head of Household** - Defaults to "No" so only change to "Yes" on the one person that is the Head of Household.
    - **Relationship to Head of Household** – Select the appropriate relationship. The client that is head of household should have "Self" in this field.
    - **Joined Household** - Only change *if different from Back Date or Current System Date*
- Click the SAVE button.
- Previous Household Members can be viewed by clicking the black arrow/triangle icon to expand the page section.

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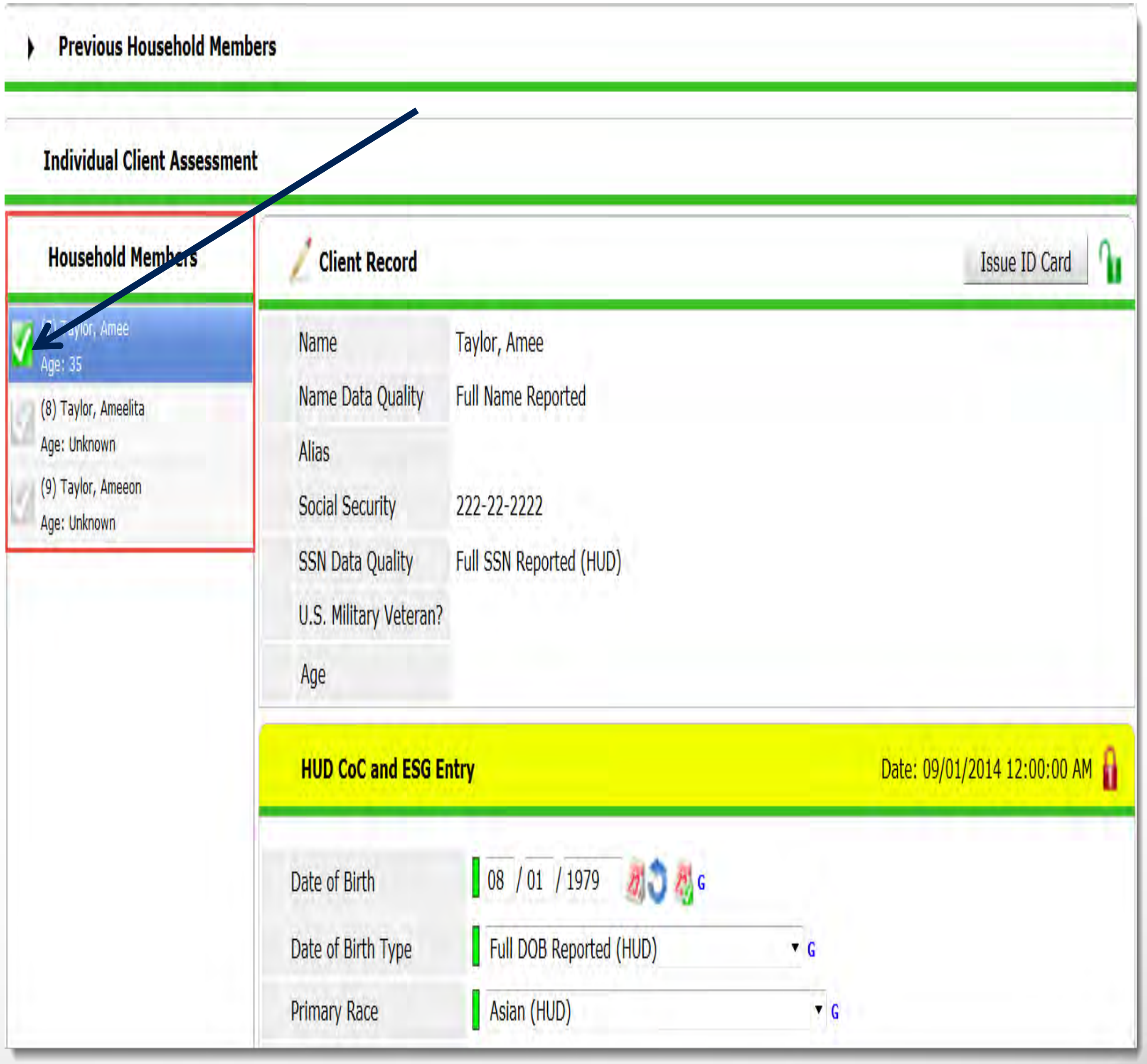
Household

It is an option to the provider to attach assessments for clients within the household area.



- ➢Click on each client name on the left-hand side of the Household Pop-up screen.
- ➢If necessary, complete an assessment for each client..
- ➢Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved.
- ➢Click Save and Exit once assessments are completed for the household.

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ROI

➢Ask your System Administrator II if the **ROI** is required in ServicePoint for your implementation!

➢Go to the ROI Tab while in the Client Record

➢Click Add Release of Information

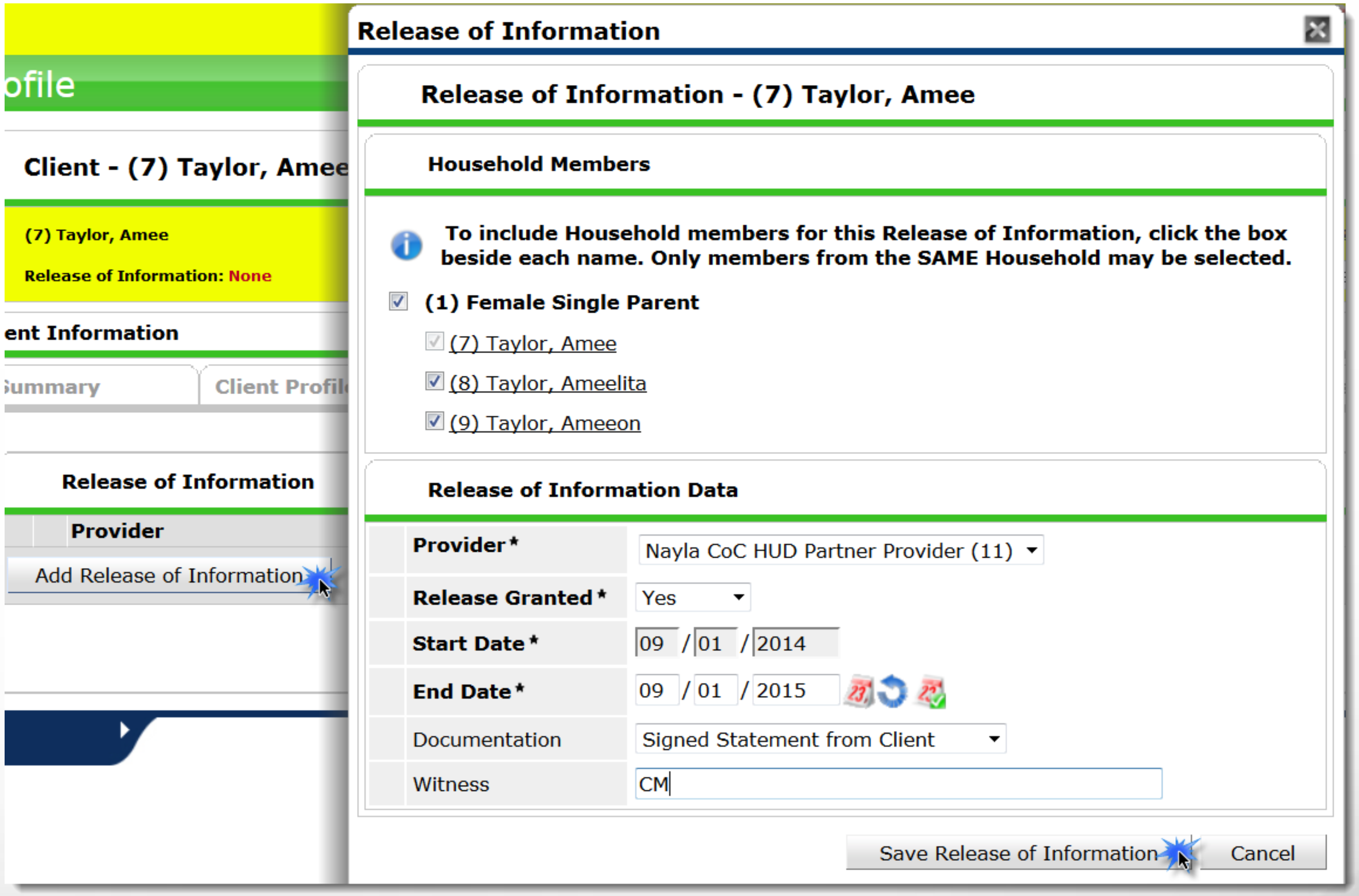
➢Check Household Members (if it applies)

➢Complete appropriate information

➢Click Save Release of Information

*Note: If **ROI** is turned on in ServicePoint, Release Granted must be answered "Yes" **in order to make assessment information visibile***

Release of Information (ROI) may trigger data sharing and visibility settings.



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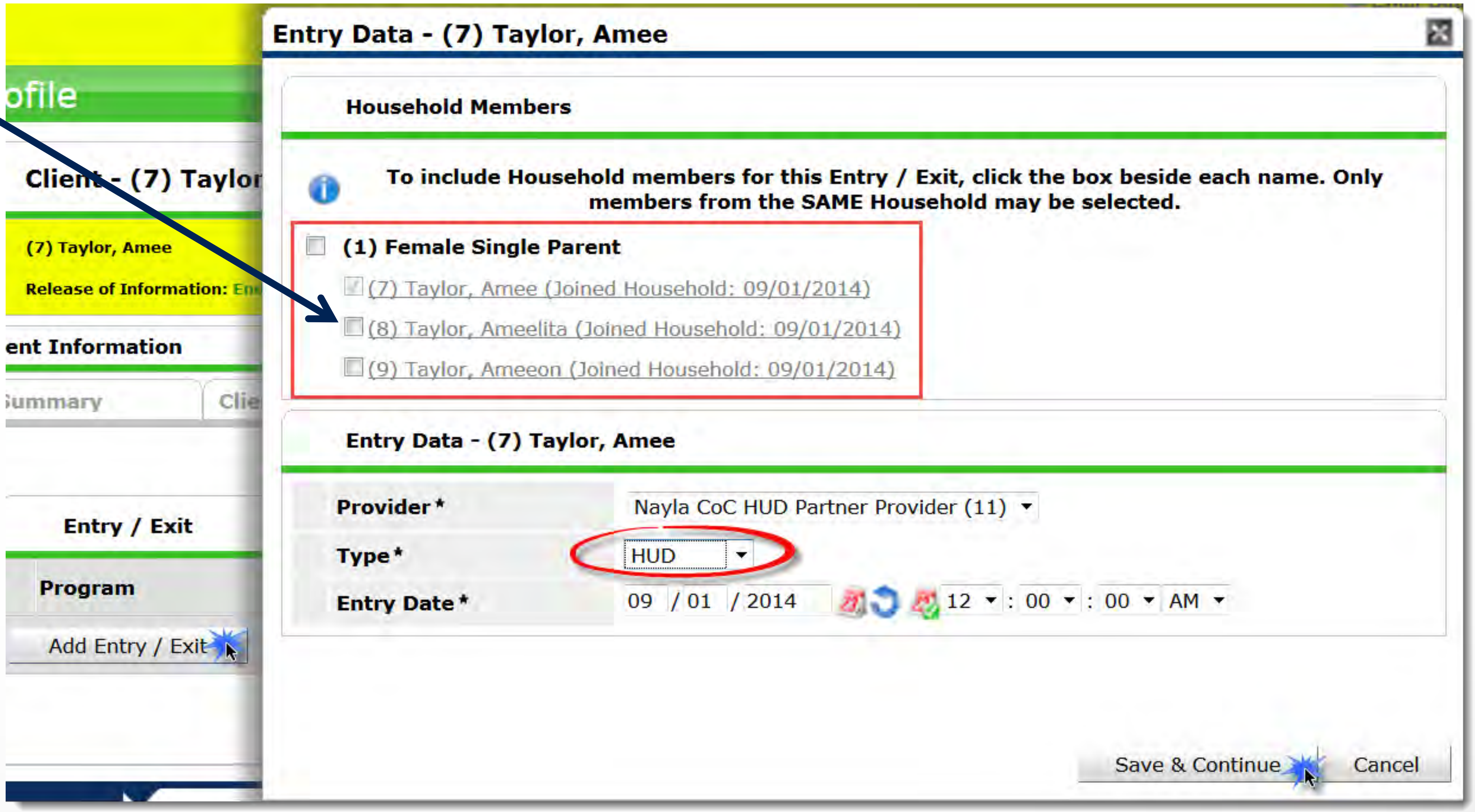
Entry Exit

Enter a client into a project.
Entry = Enrollment

- ➢Click Add Entry/Exit
- ➢Select all household members that will be entered into the program as appropriate
- ➢Provider is defaulted to the provider you're signed in as or provider that you're Entering Data As (EDA)
- ➢Select appropriate Entry Type (i.e. HUD, VA, PATH, etc.)
- ➢Entry date and time is defaulted to the current system date or the date and time you're backdating to
- ➢Click Save & Continue



Entry Exit

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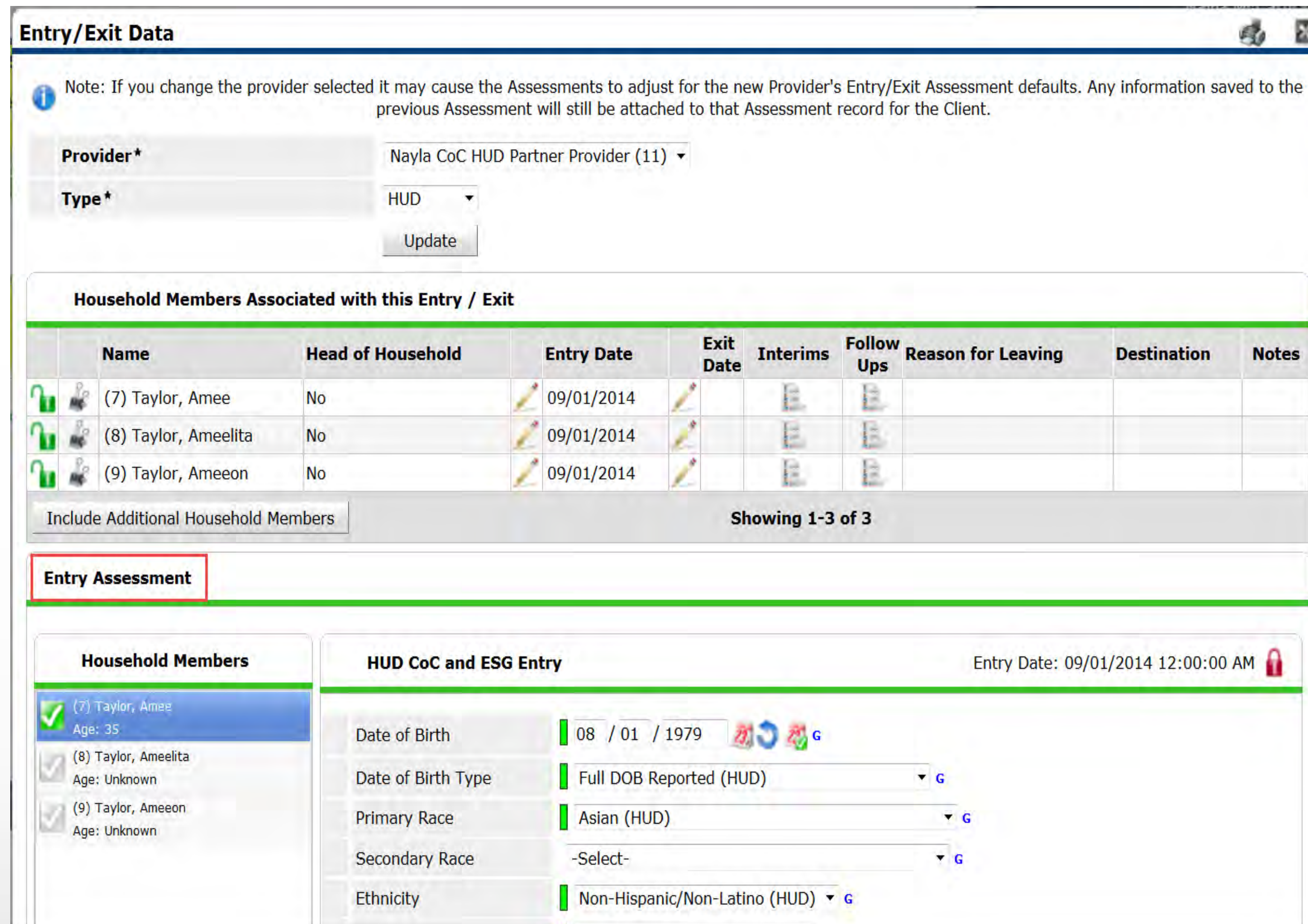
- Answer all questions on the **Entry Assessment**. These fields are important for reporting status at Entry.
- Follow the screen from top to bottom
- Click Save then click on each household member on the left-hand side of the Entry/Exit Data Pop-up to complete their Entry Assessments
- Green checkmarks will appear next to each household member's name as their assessment questions are answered & saved.
- Click Save & Exit if completed

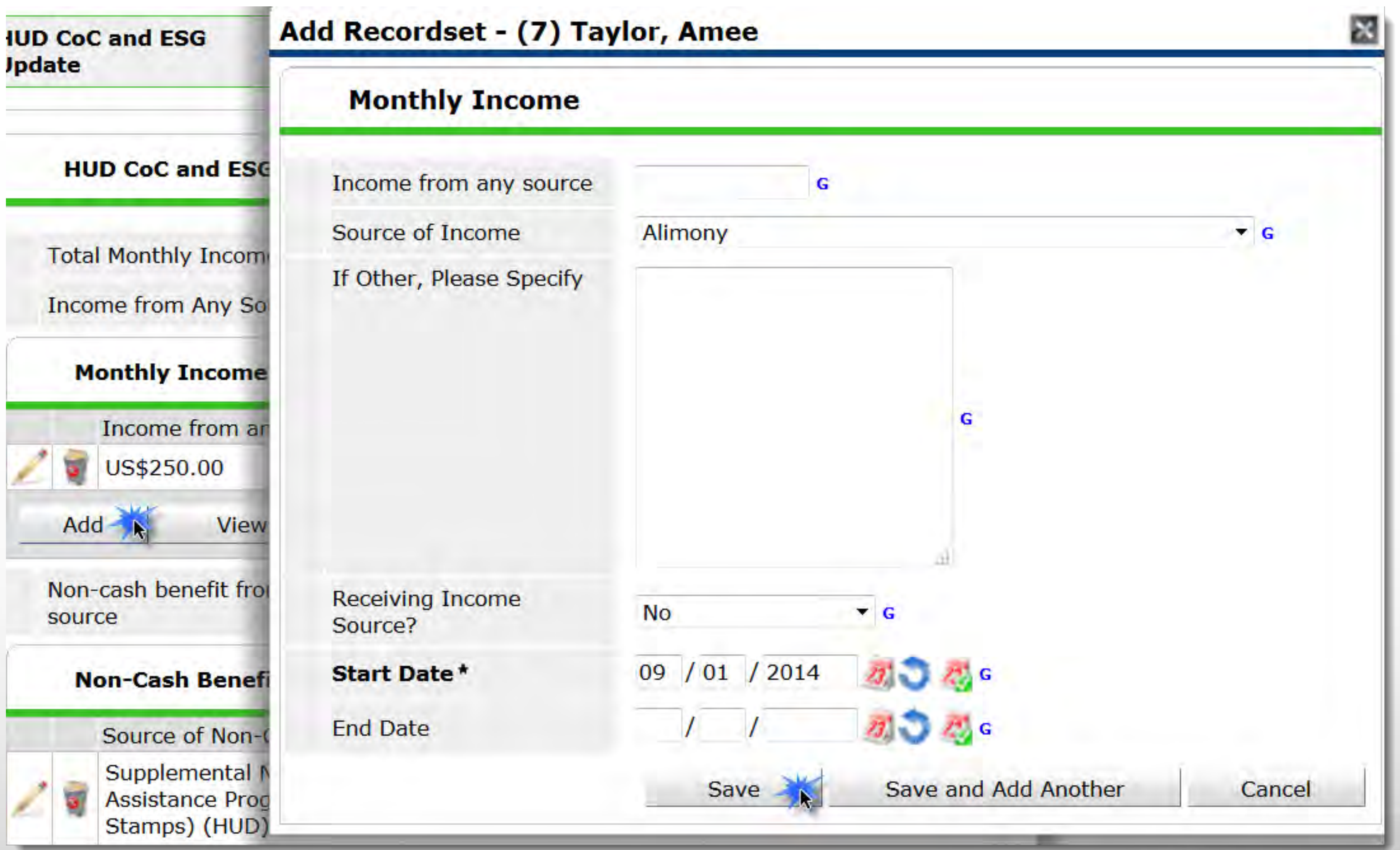


Note: For HUD Verification within E/E Assessment, see next slide

Collaborate. Coordinate. Evaluate.

Entry Exit

- If HUD Funded, HUD ***requires*** that YES and NON-YES Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities be verified during Entry, Updates (Interims), Annual Assessments, Exits and Follow-Up:
  - These can be updated individually by clicking "ADD" and manually entering the information for each sub-assessment and fields within those sub-assessments OR
  - You can ***quickly*** do this by clicking the **HUD Verification** link (see how to on next slide)



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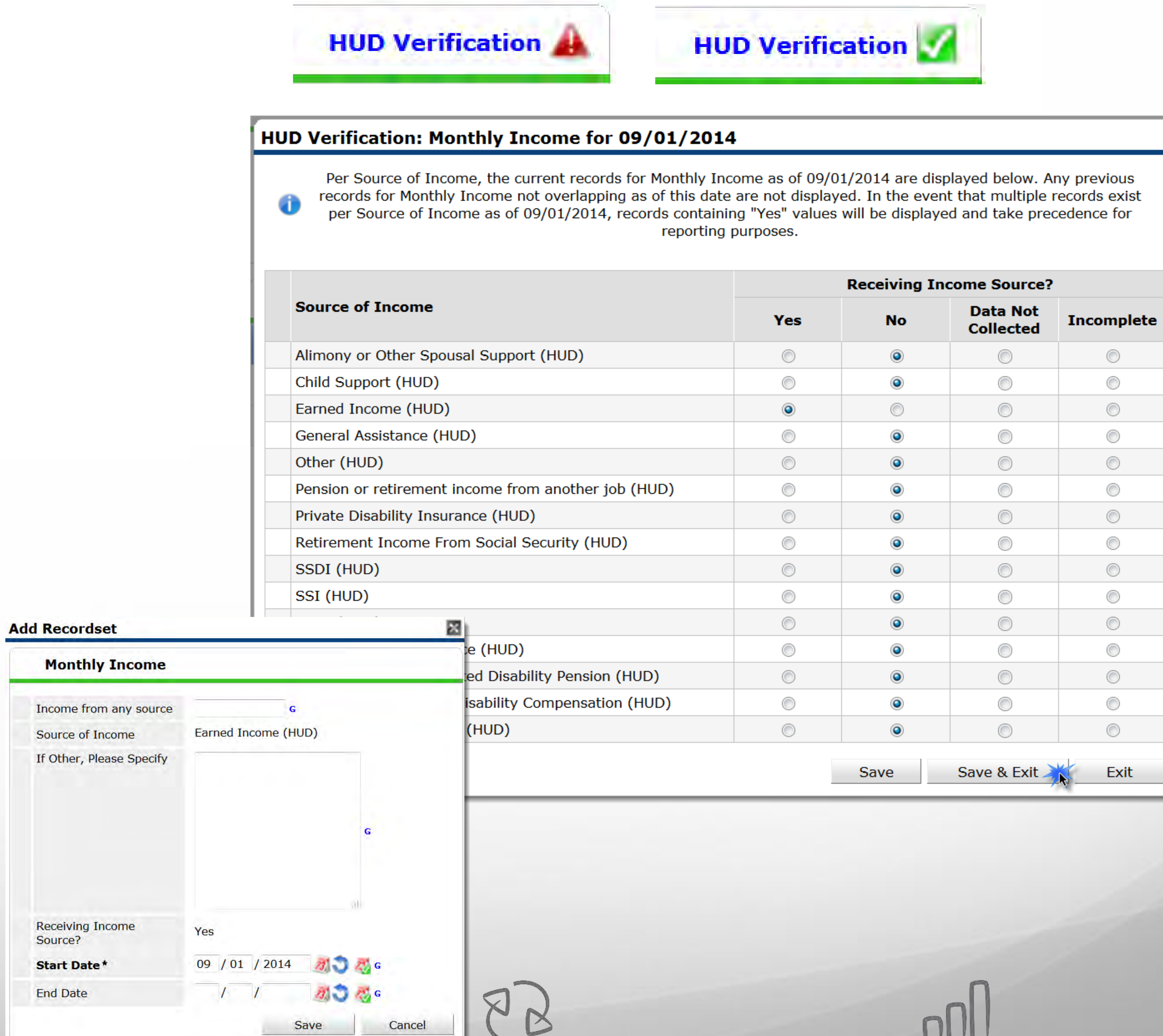
Entry Exit

- You can ***quickly*** do this by clicking the **HUD Verification** link!
- The HUD Verification pop-up will display
- Select Yes, No, Data Not Collected as appropriate
  - If you select Yes, you will have another pop-up display to complete pertinent information about that benefit or income
- Once completed, click Save & Exit
- A Green check mark will appear once benefits are all verified next to the HUD Verification link



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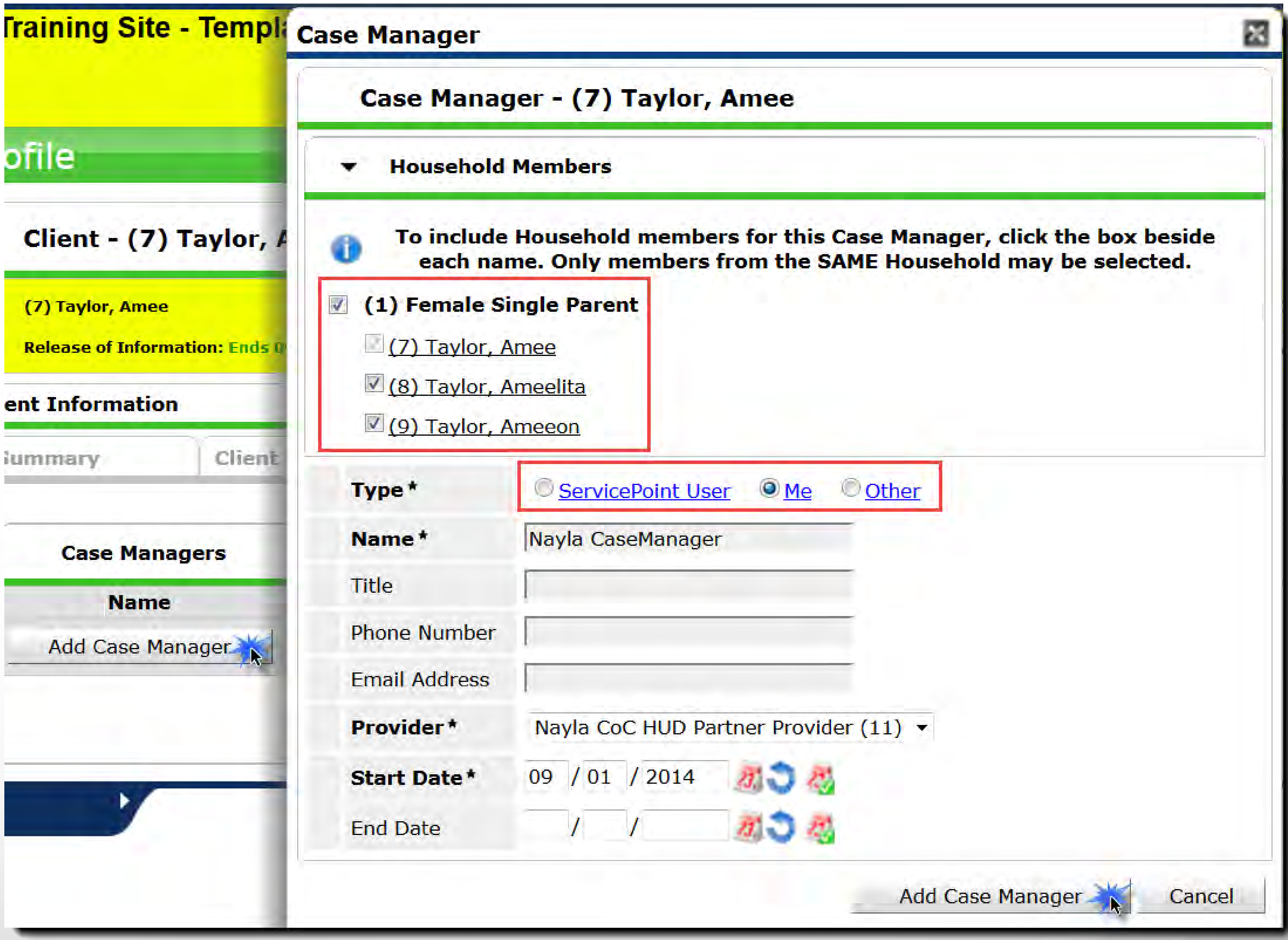
Case Manager

- Click the Case Manager Tab within Client Information
- Click Add Case Manager
- Select household members
- Select the Case Manager:
  - **ServicePoint User**- allows to pick from a dropdown of users for that provider
  - **Me**- will default you (user entering the information)
  - **Other**- will allow manually entered Case Manager information
- Provider will be defaulted to user default provider or provider user is Entering Data As (EDA)
- Click Add Case Manager



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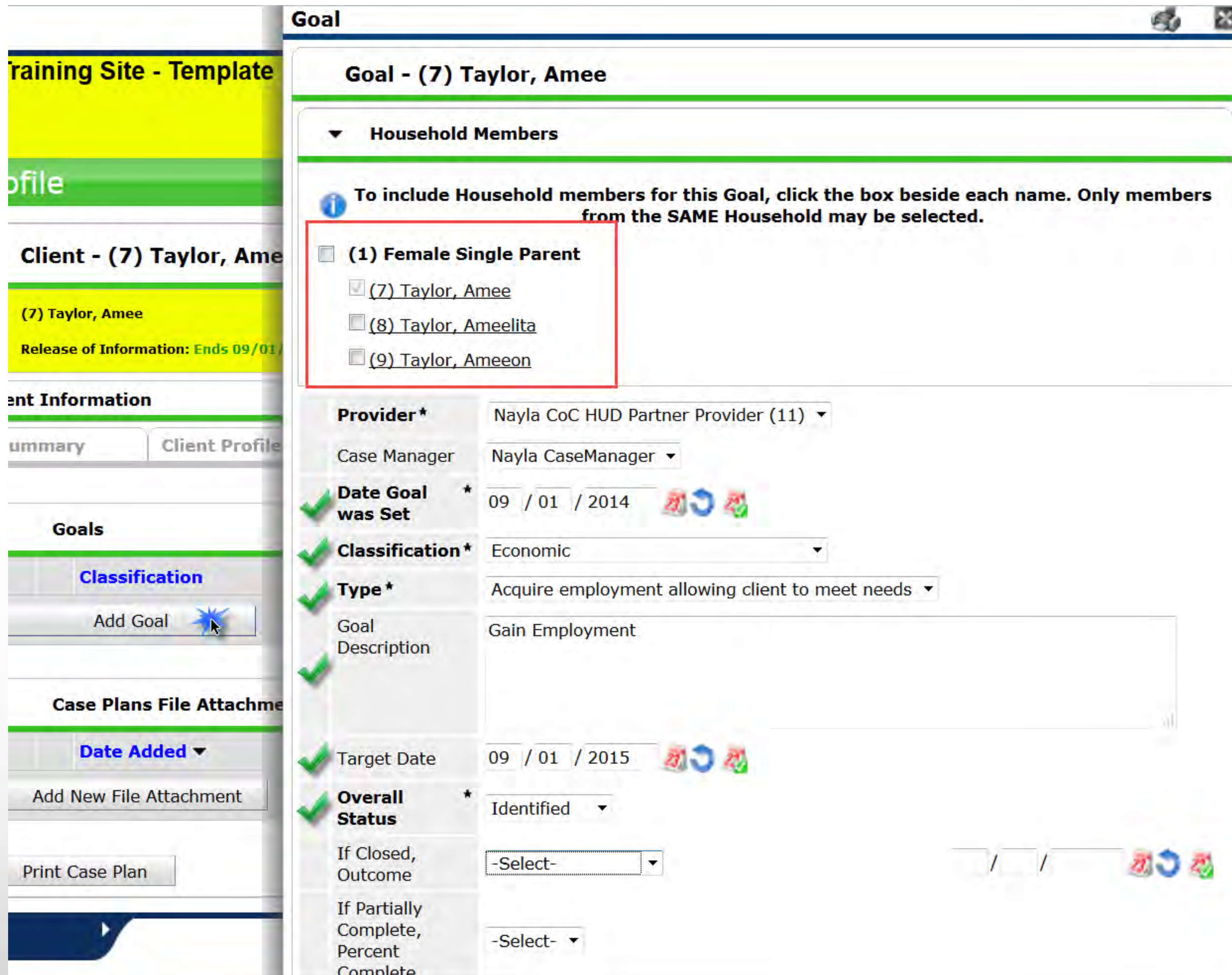
Case Plans

Create **Goals**, **Action Steps** and **Case Notes** to assist clients in planning self sufficiency and track outcomes!!

The questions in bold are required to be answered in order to save the goal.

- ➢Click the Case Plans Tab within Client Information
- ➢Click Add Goal
- ➢Select household members that the Goal applies to
- ➢Date Goal was Set is defaulted to the current System date or Back Date
- ➢Select Classification
- ➢Select Type
- ➢Enter Goal Description
- ➢Select Target Date
- ➢Select Overall Status



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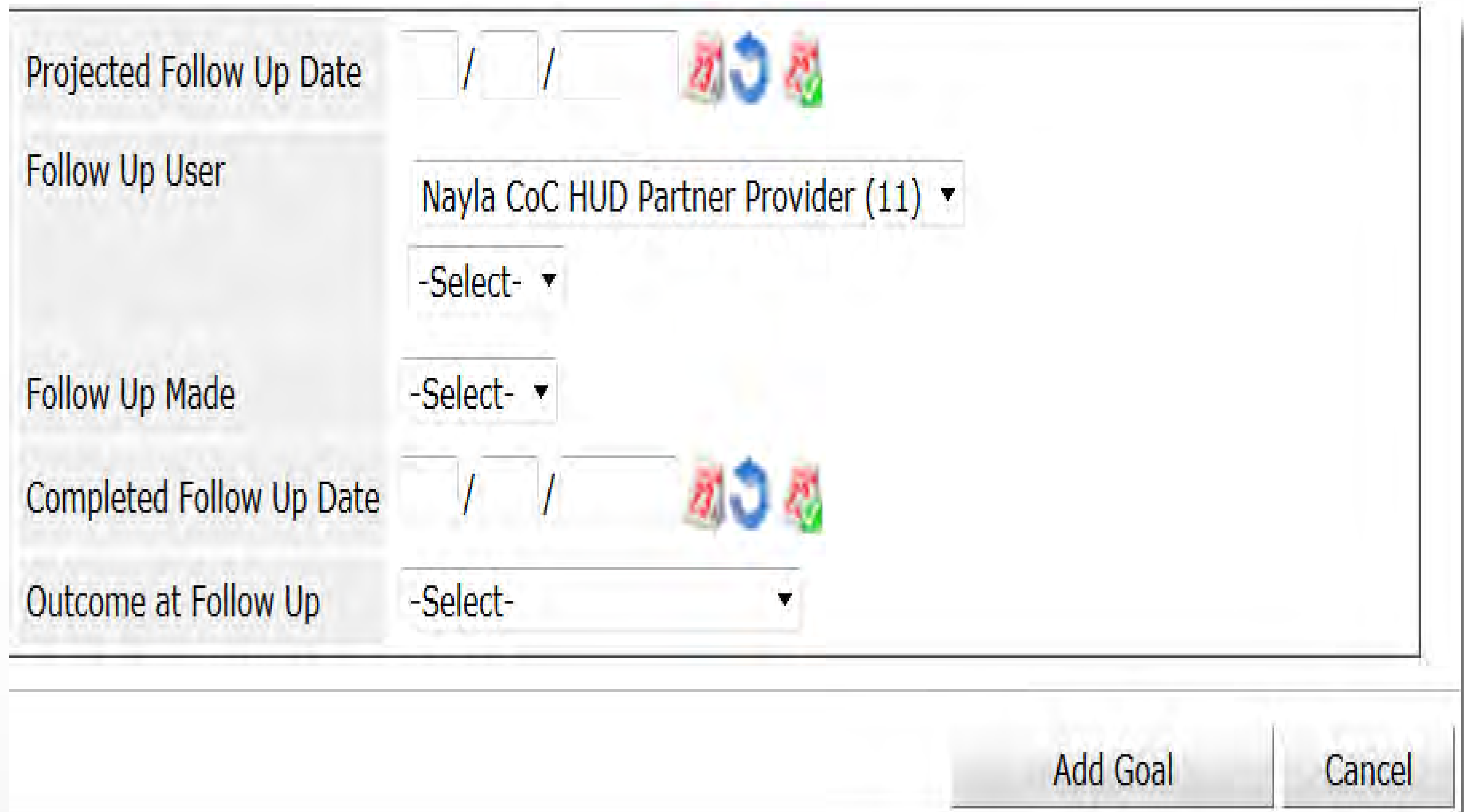
Case Plans (continued)

- If necessary, create a follow-up. This will create a reminder within the Home Page Dashboard within the Follow-Up Dashlet.
- Assign the date the follow-up should be done by and the user who should follow up, if necessary.
- Once the follow-up has been made at a later date, the following fields can be answered: Follow Up Made, Completed Follow Up Date, and the Outcome is filled out.



Case Plans (continued)

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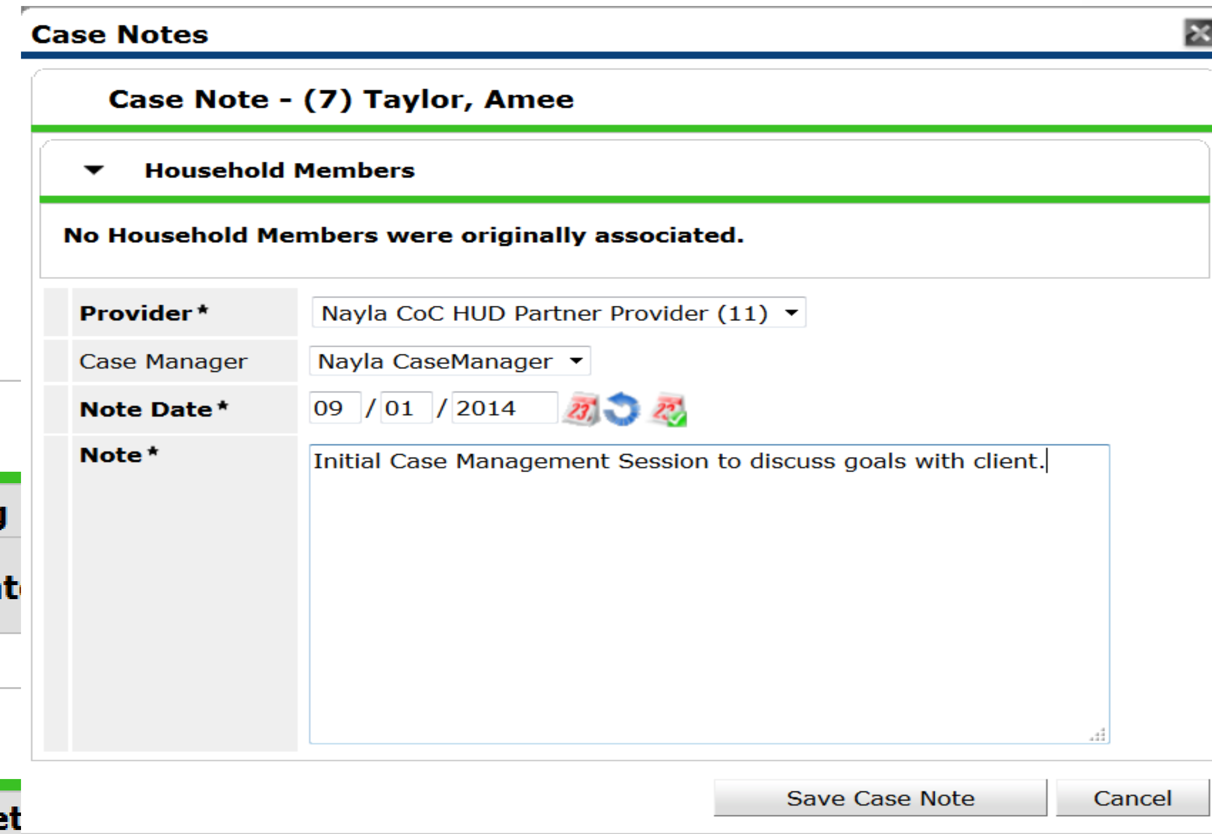
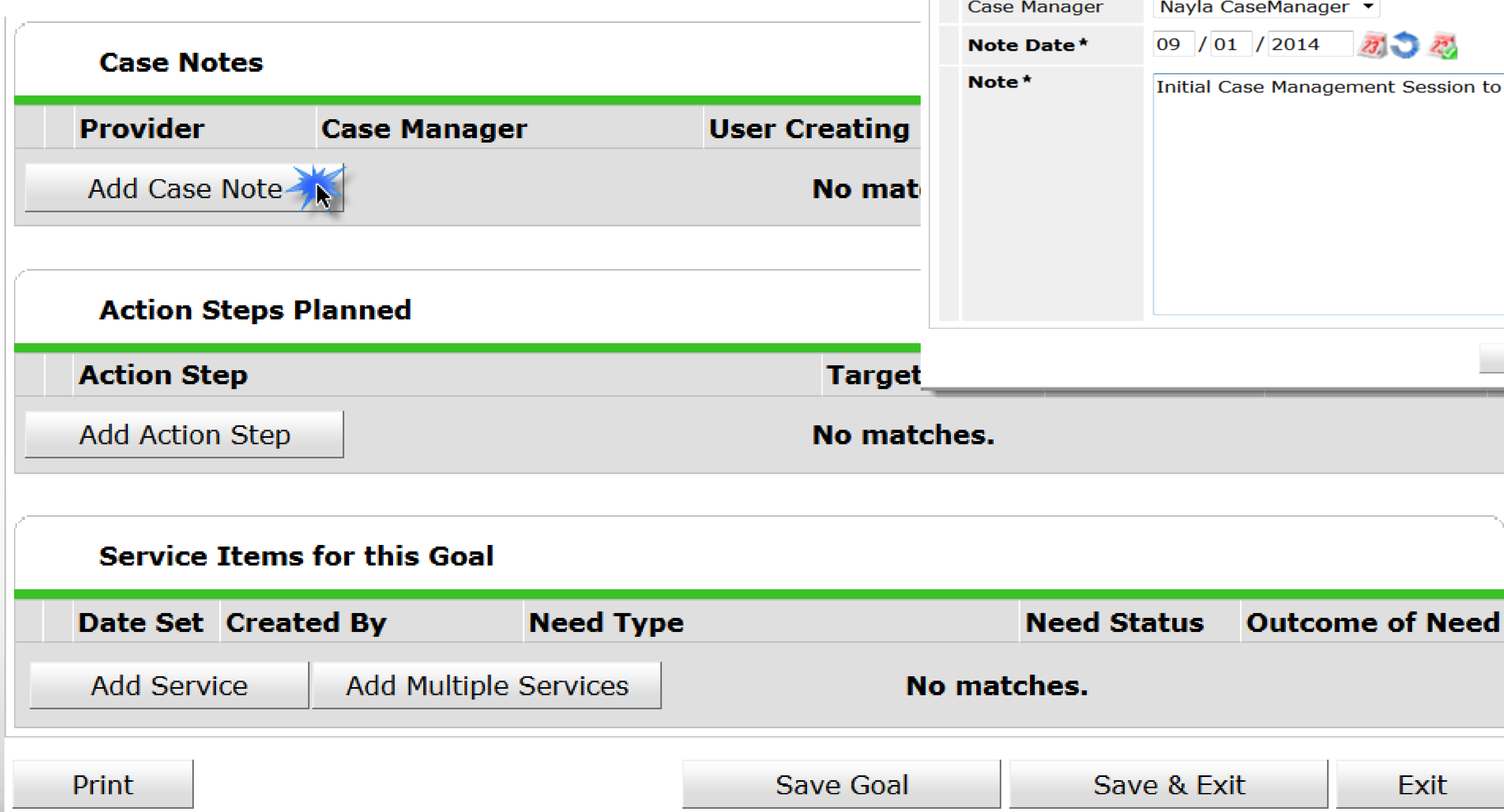
- Add Case Notes
- Complete Case Notes
- Click Save Case Note when finished





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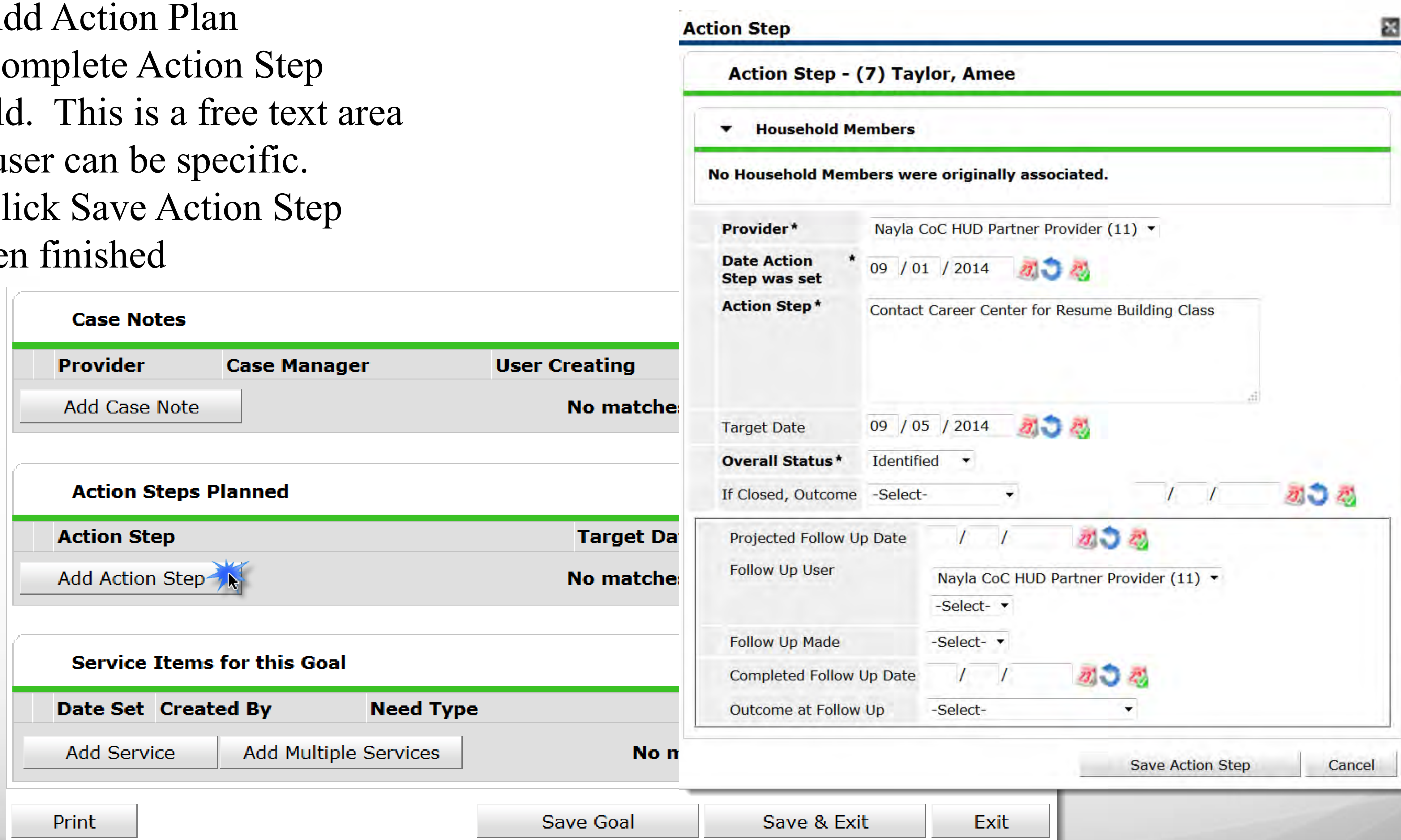
Case Plans (continued)

- Add Action Plan
- Complete Action Step Field. This is a free text area so user can be specific.
- Click Save Action Step when finished



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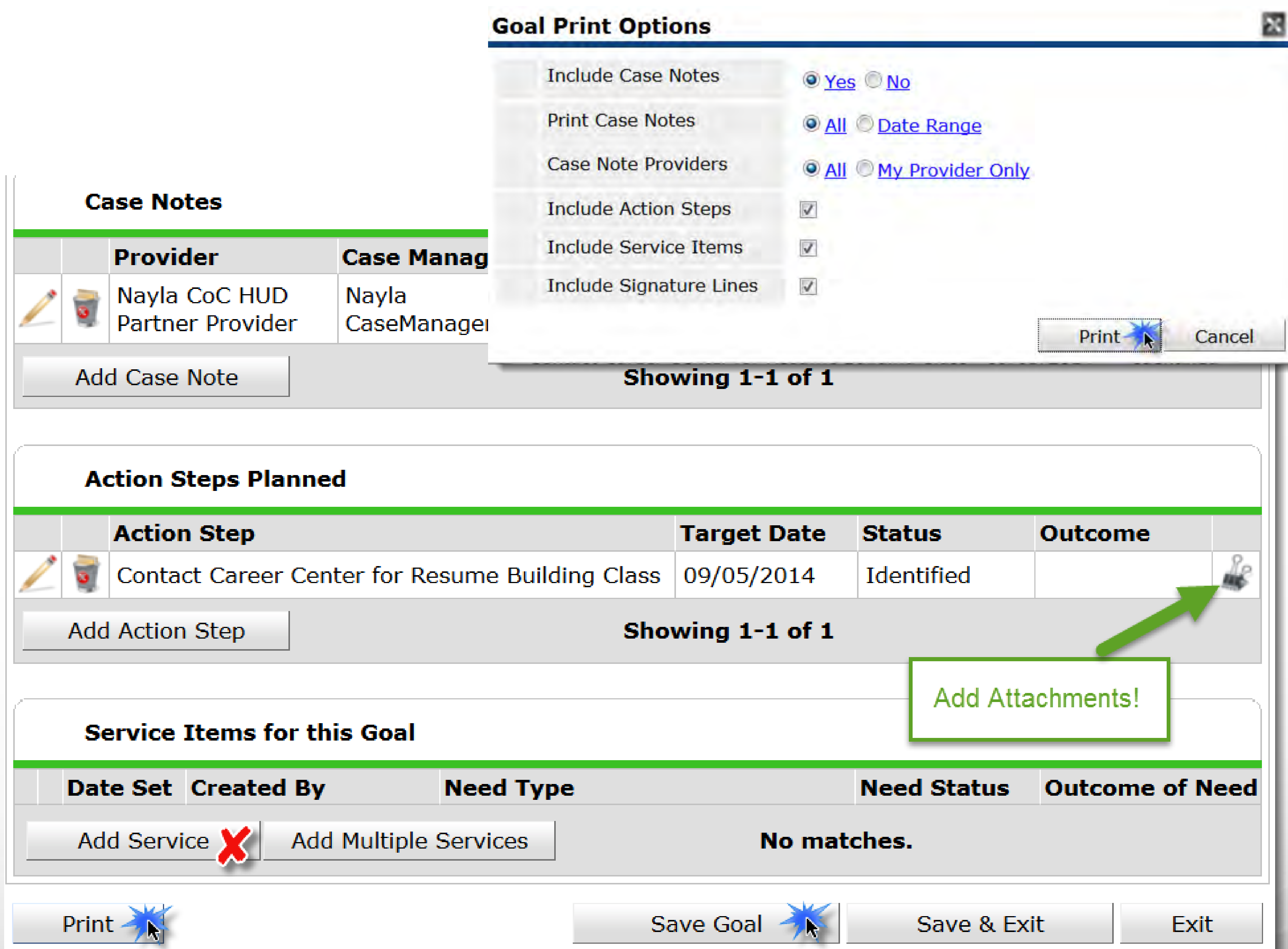
Case Plans (continued)

We will skip Add Services within the screen. See Service Transactions for details on how to add services

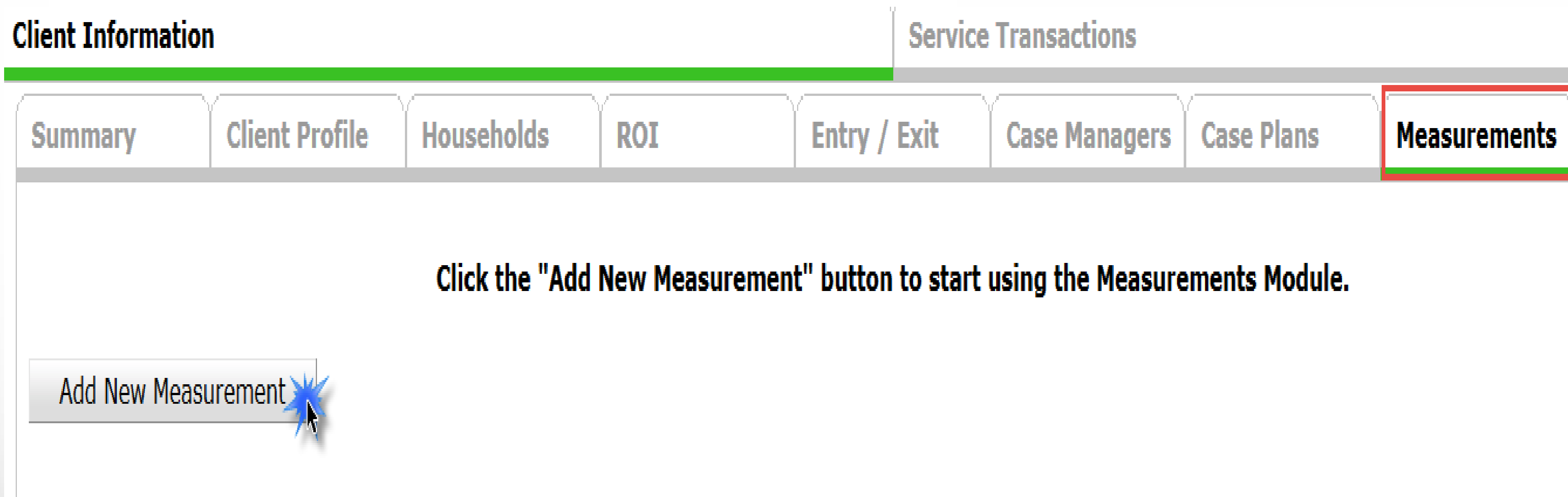
- Click Print to print the Case Plan for your Client
  - Select desired options. Then click Print
- Click Save Goal or
- Click Save & Exit when finished



Measurements (Optional Tools)

There are 3 different measurements possible depending on the provider set-up: Self Sufficiency Matrix, SPDAT, and F-SPDAT. This guide only covers the Self -ufficiency Matrix.

- Click the Measurements Tab within Client Information
- Click Add New Measurement



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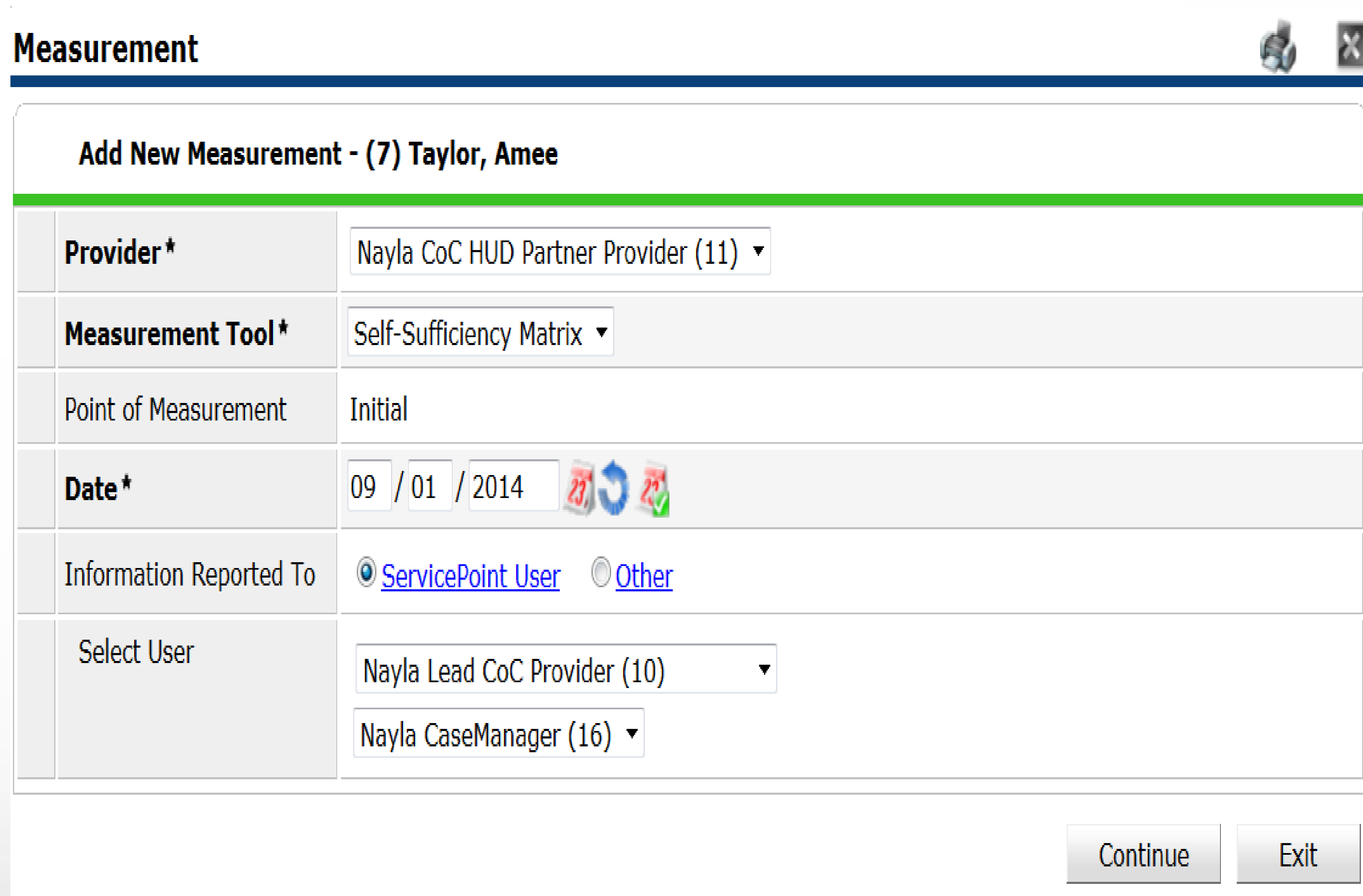
Measurements (Optional Tools)

- Provider- Defaults to user provider or EDA Provider
- Measurement Tool- Tools the provider is using will be available from the dropdown.
- Point of Measurement– must have an initial measurement first.
- Information Reported To-
  - *ServicePoint User*
  - *Other (if other, type name)*
- Click Continue, then the screen will expand

Measurement Pop-up

Note: Bold Questions need to be answered in order to continue



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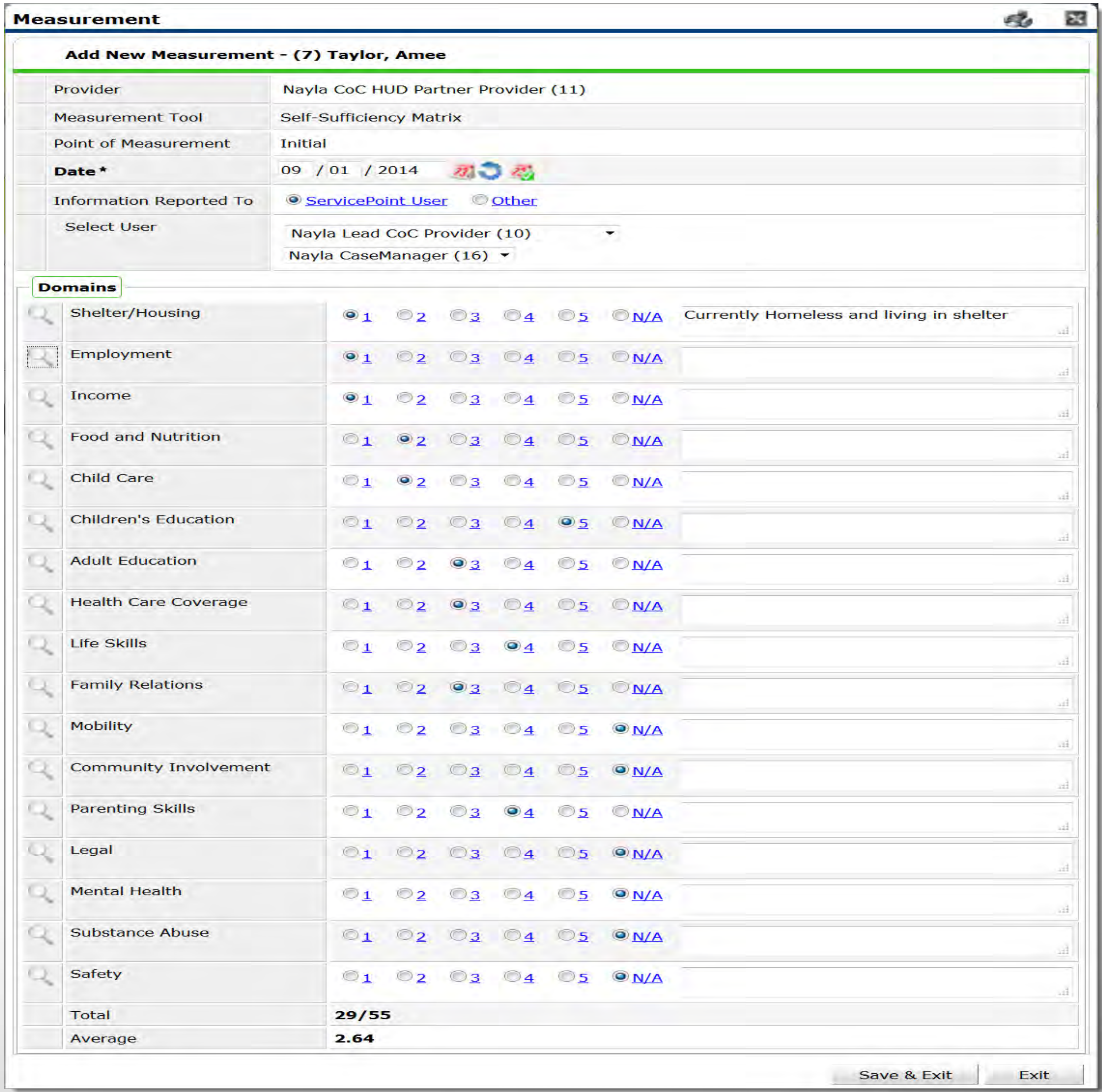
Measurements (Optional Tools)

- ➢Complete Measurement Tool per your Provider's standards.
- ➢Click on the magnifying glass to view what the number represents in that particular domain.
- ➢When completed, click Save & Exit



Measurement

Add New Measurement - (7) Taylor, Amee

Provider	Nayla CoC HUD Partner Provider (11)
Measurement Tool	Self-Sufficiency Matrix
Point of Measurement	Initial
Date *	09 / 01 / 2014
Information Reported To	◉ ServicePoint User ○ Other
Select User	Nayla Lead CoC Provider (10) Nayla CaseManager (16)

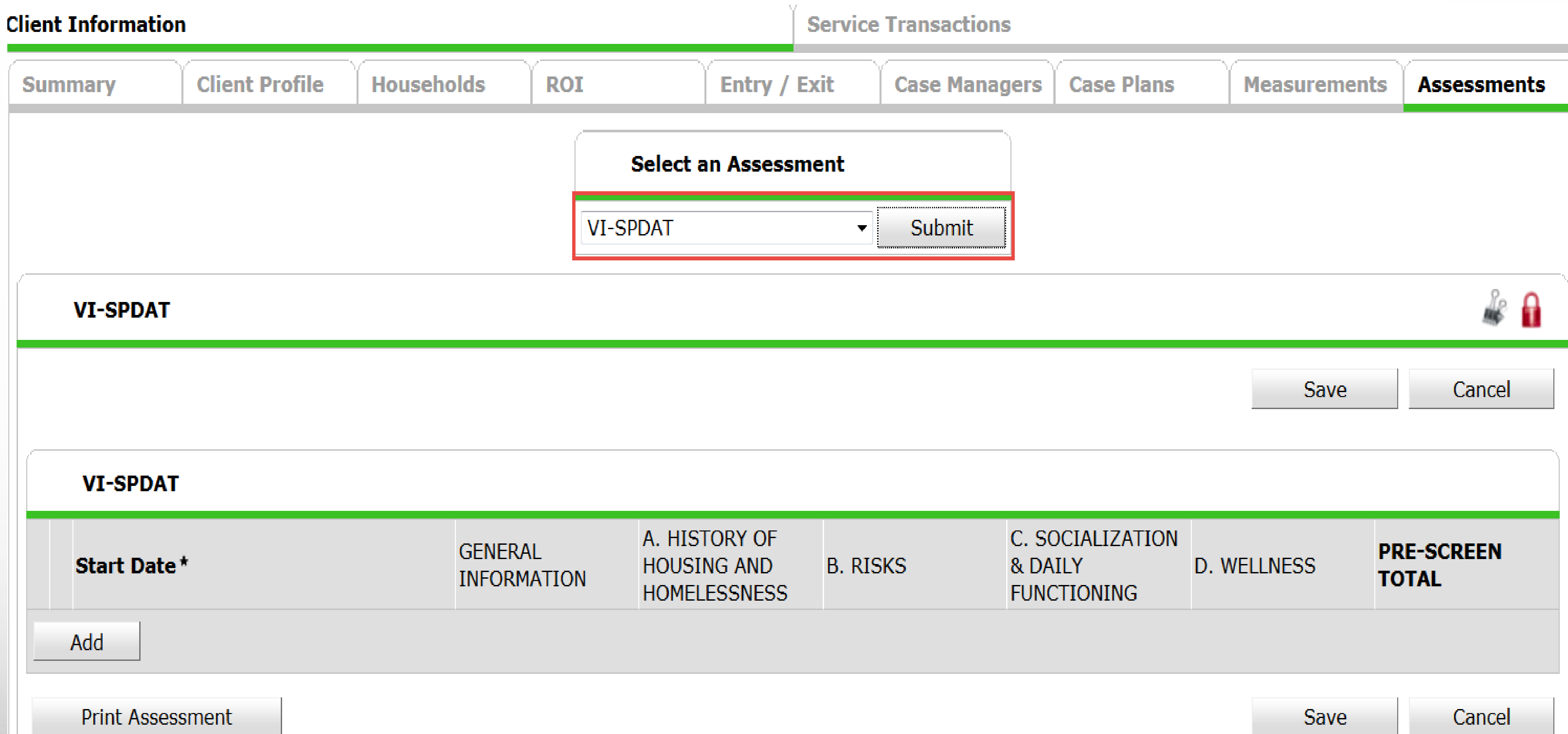
Domains

Shelter/Housing	◉ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ N/A	Currently Homeless and living in shelter
Employment	◉ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ N/A	
Income	◉ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ N/A	
Food and Nutrition	○ 1 ◉ 2 ○ 3 ○ 4 ○ 5 ○ N/A	
Child Care	○ 1 ◉ 2 ○ 3 ○ 4 ○ 5 ○ N/A	
Children's Education	○ 1 ○ 2 ○ 3 ○ 4 ◉ 5 ○ N/A	
Adult Education	○ 1 ○ 2 ◉ 3 ○ 4 ○ 5 ○ N/A	
Health Care Coverage	○ 1 ○ 2 ◉ 3 ○ 4 ○ 5 ○ N/A	
Life Skills	○ 1 ○ 2 ○ 3 ◉ 4 ○ 5 ○ N/A	
Family Relations	○ 1 ○ 2 ◉ 3 ○ 4 ○ 5 ○ N/A	
Mobility	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Community Involvement	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Parenting Skills	○ 1 ○ 2 ○ 3 ◉ 4 ○ 5 ○ N/A	
Legal	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Mental Health	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Substance Abuse	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Safety	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ◉ N/A	
Total	**29/55**	
Average	**2.64**	

Save & Exit Exit

Assessments

- ➢If part of your agency's workflow, click the Assessments Tab
- ➢Select an assessment from the list, then click Submit
- ➢Enter the data elements required by your provider
- ➢Click Save



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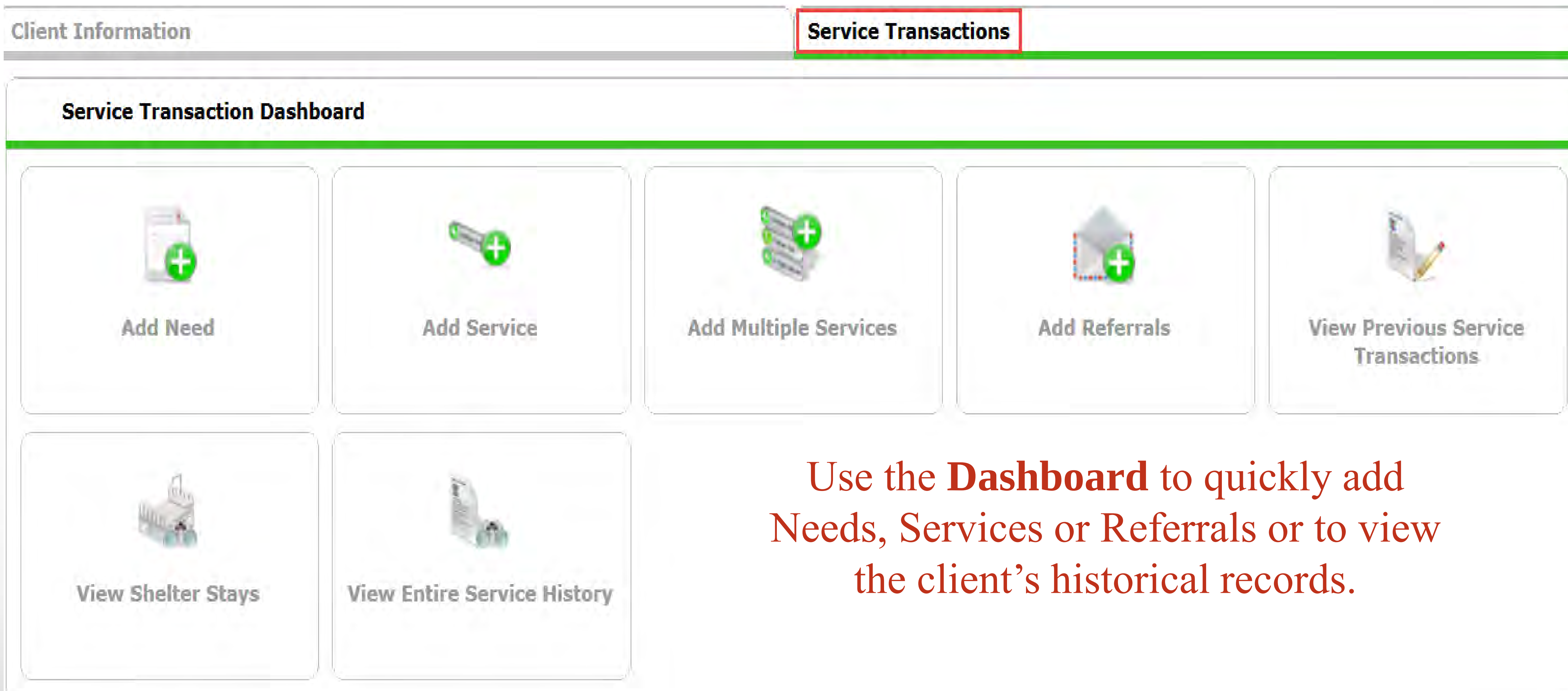
Service Transactions

"ServiceTransactions Tab"



Use the **Dashboard** to quickly add Needs, Services or Referrals or to view the client's historical records.

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Need Service Referral

Things you should know…

- A need must be created in order for the End User to add services or referrals to the Client record.
- Bowman Systems uses 211 LA/AIRS Taxonomy, an indexing system of Health and Social Services
- Taxonomy Term = Service Term = Services rendered by a provider
- Needs will always be the same as the Service Term

  Example :

  - Client's Need = Emergency Shelter,
  - Service Provided = Emergency Shelter
  - If a referral, this would also equal = Emergency Shelter because it is a Service that the receiving agency provides

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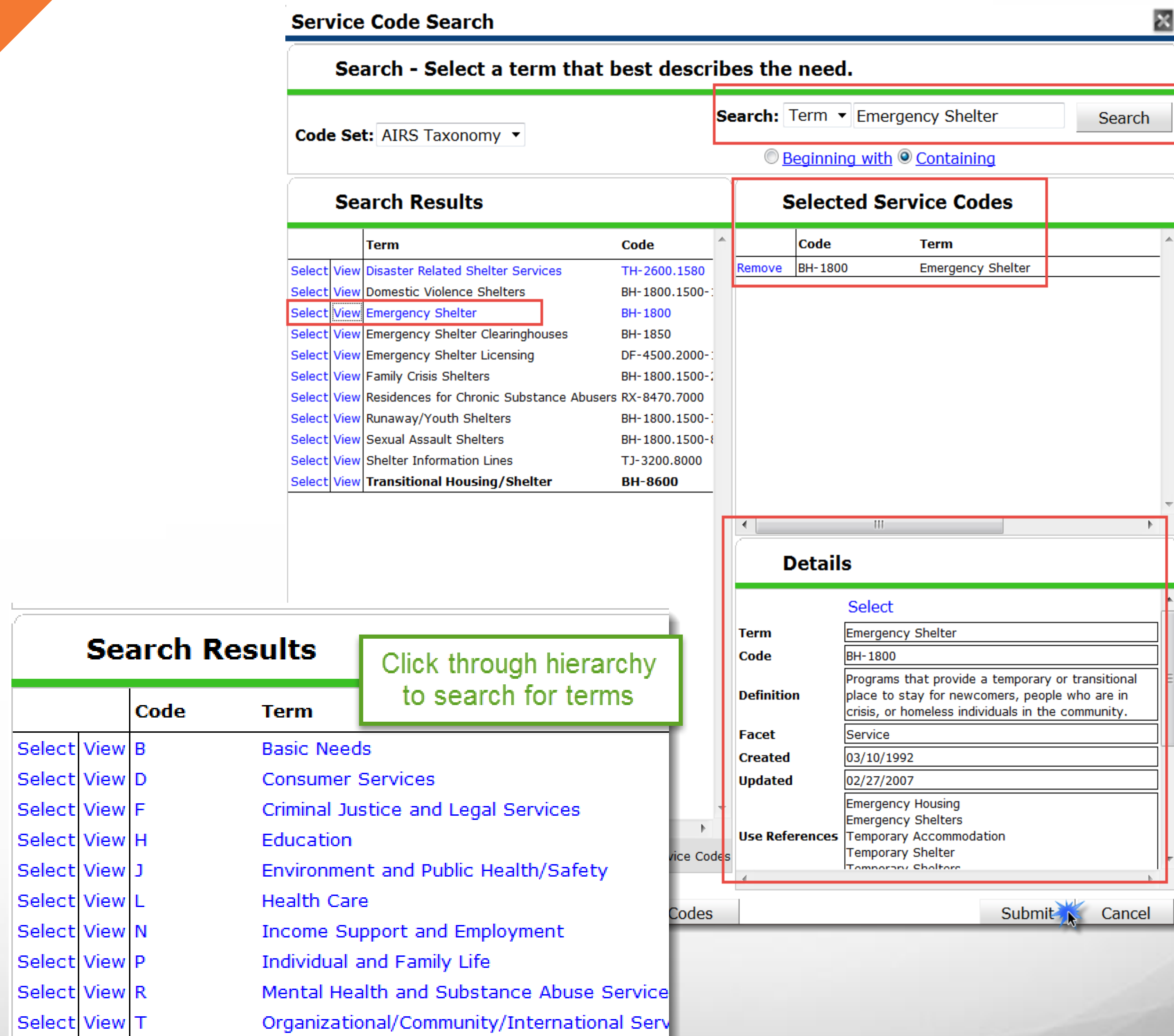
Service Transactions/ AIRS Taxonomy

- ➢ Each Provider should have a **Quick List** created of the most common needs/ services requested by their clients.
- ➢ When a Quick List is not created, users have to "Look-up" service Terms within ServicePoint's pop-up AIRS taxonomy
- ➢ Service Terms can be searched within the Search box or by searching within the hierarchy
- ➢ Click Select to the left of the taxonomy term
- ➢ Click View to view the description of the Service term under details



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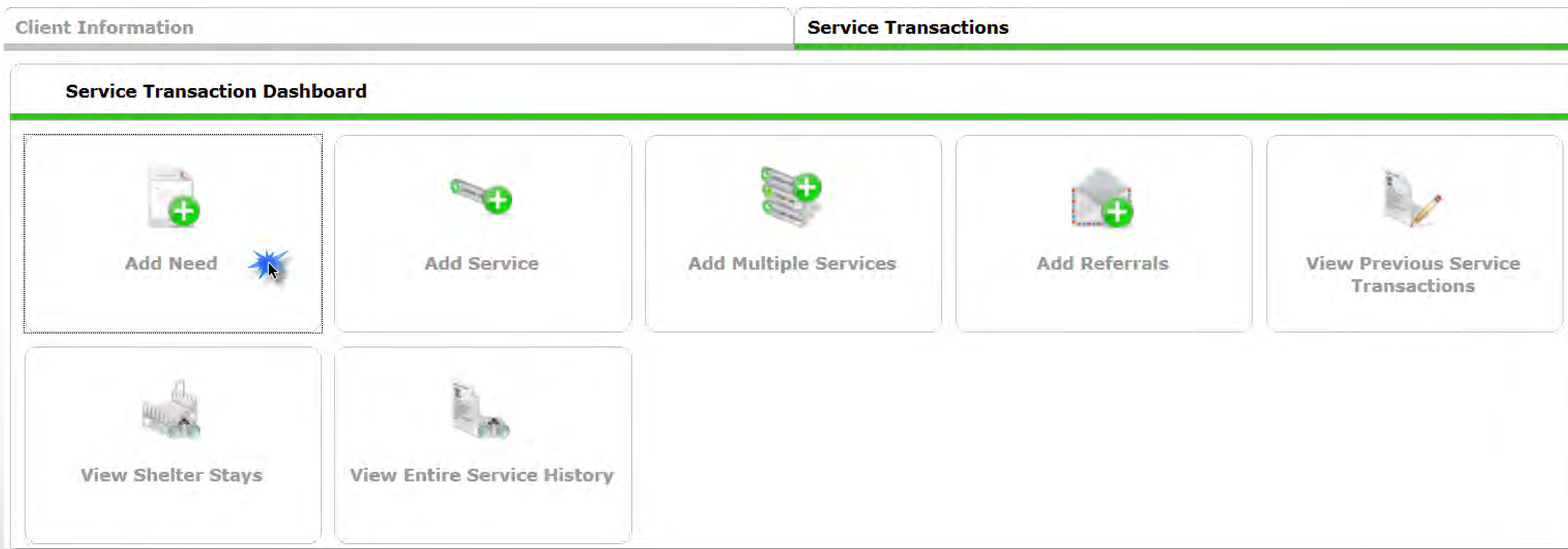
Need

➢ If no services or referrals are to be provided and only need(s) are to be recorded, click Add Need



Collaborate. Coordinate. Evaluate.

Need

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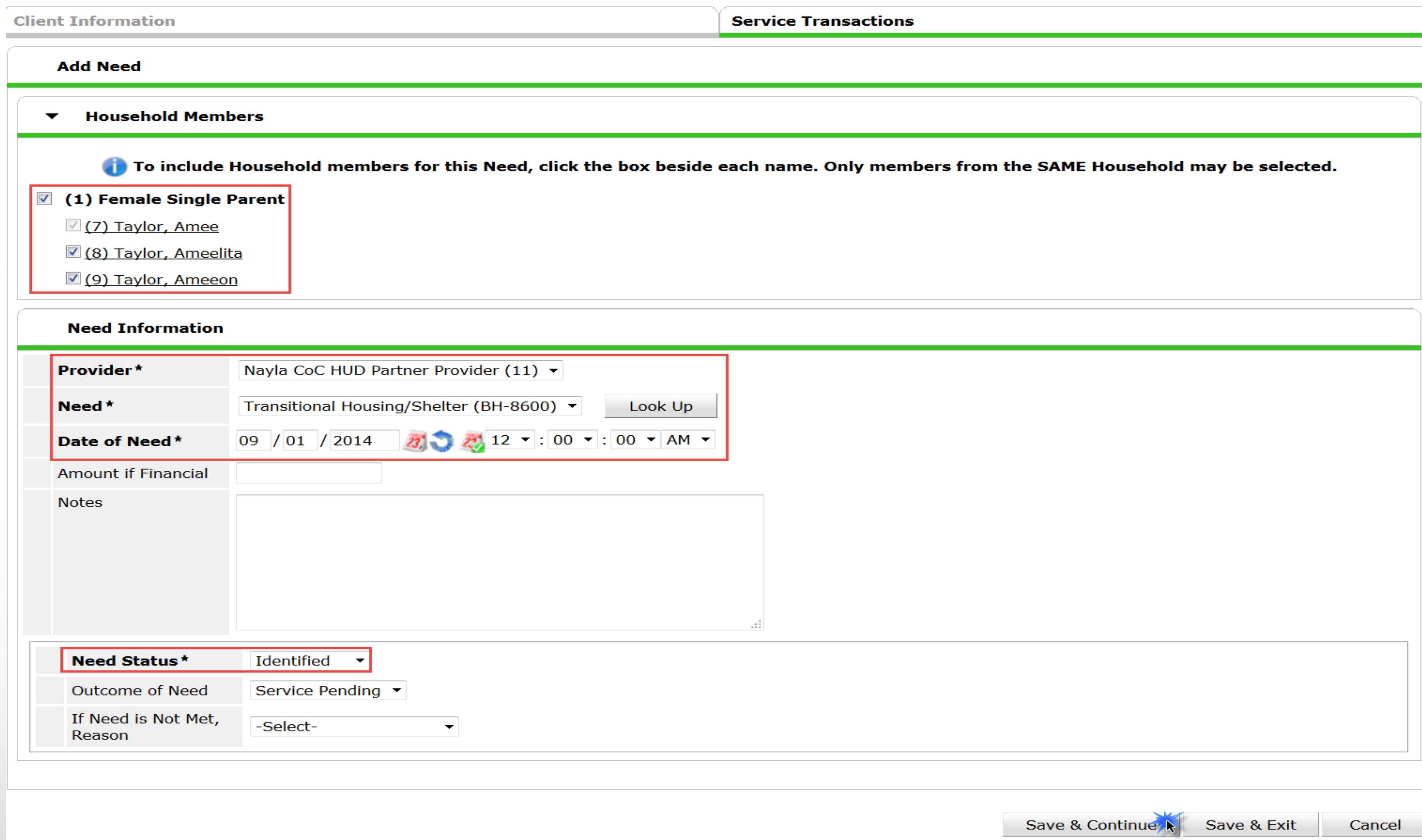
- ➢Select to which household members as necessary
- ➢Select the Need from the quick list or use the Look Up to find a term that best describes the need.
- ➢Click Save & Continue



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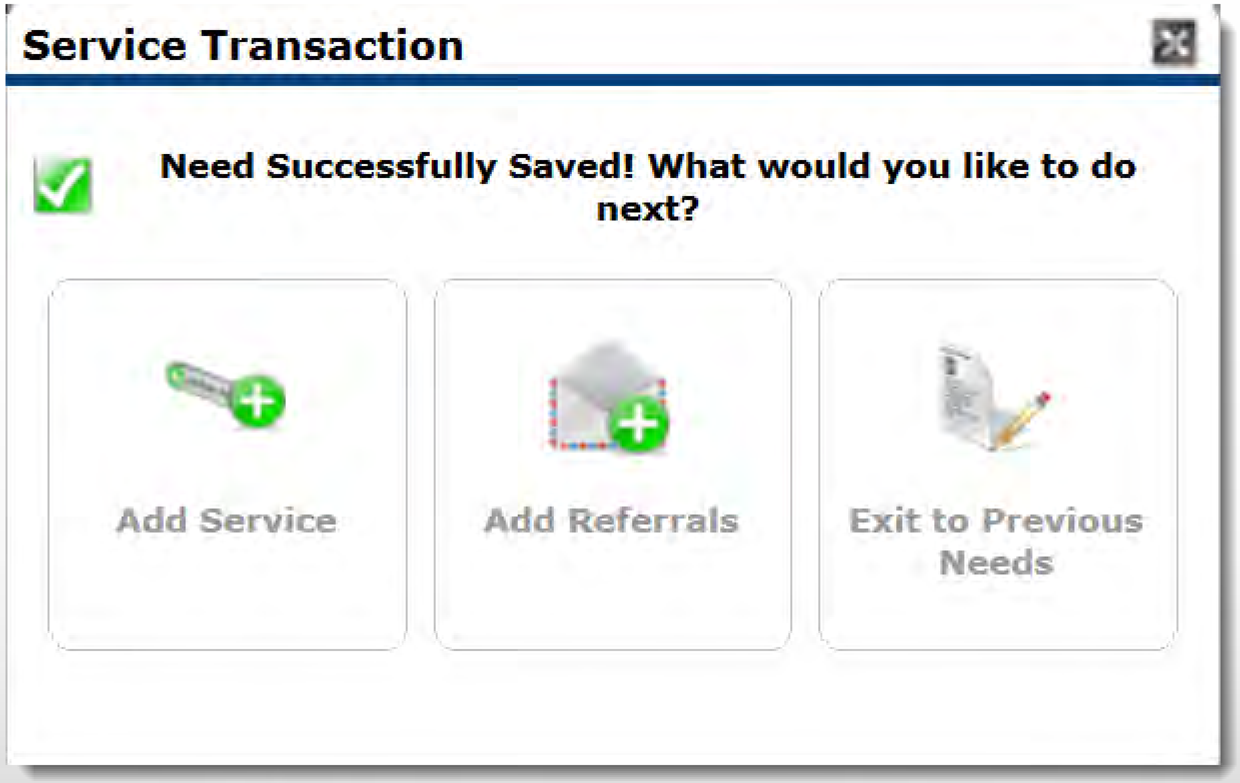
Service Transaction Action Worfklow

- An action window will appear to assist the user with the next data entry step in the process.
- A user could add a Service or Referral (Service and Referral workflows to follow)
- If there is only the need at this time, Click "Exit to Previous Needs" to go to the entire need history (see next slide).



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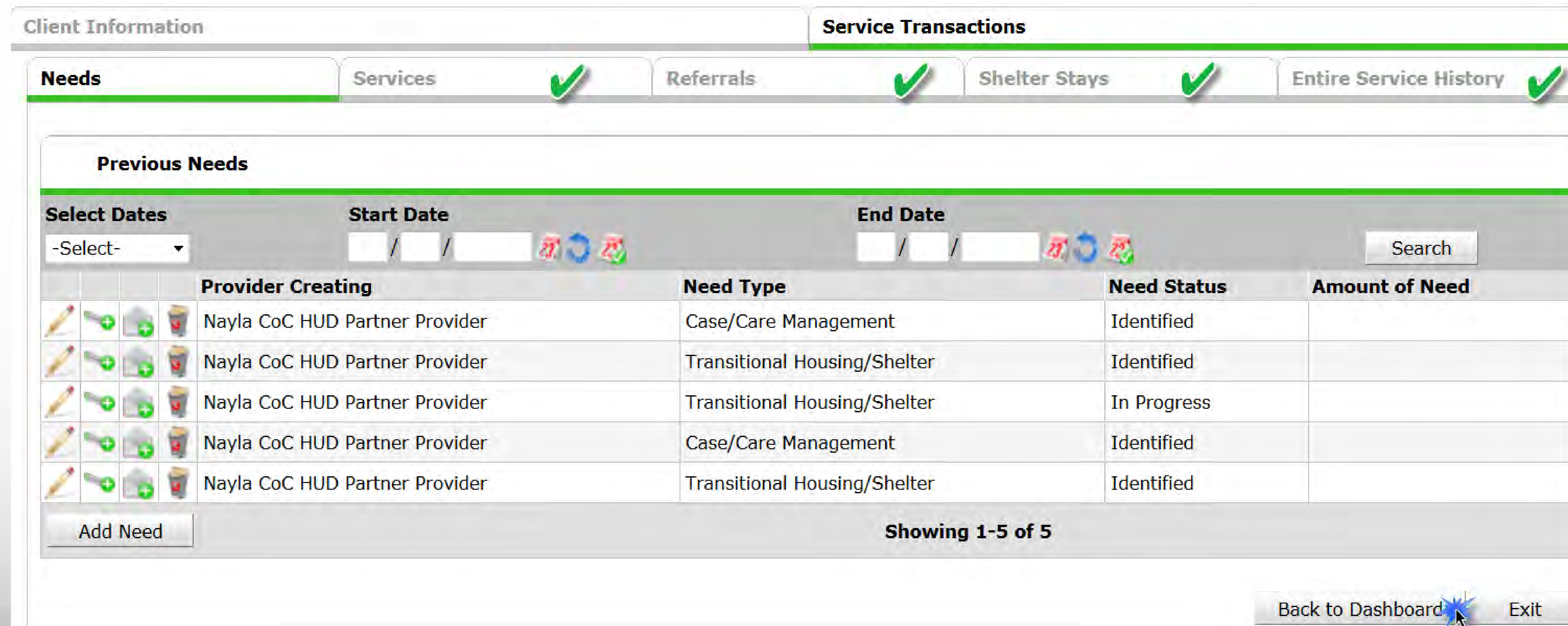
Service Transaction Action Workflow

- A user can add more Needs, Services or Referrals from this window by clicking the appropriate tab.
- To get back to the Dashboard, click on the "Back to Dashboard" button at the bottom of the screen at this time



Provider Creating	Need Type	Need Status	Amount of Need
Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress	
Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	

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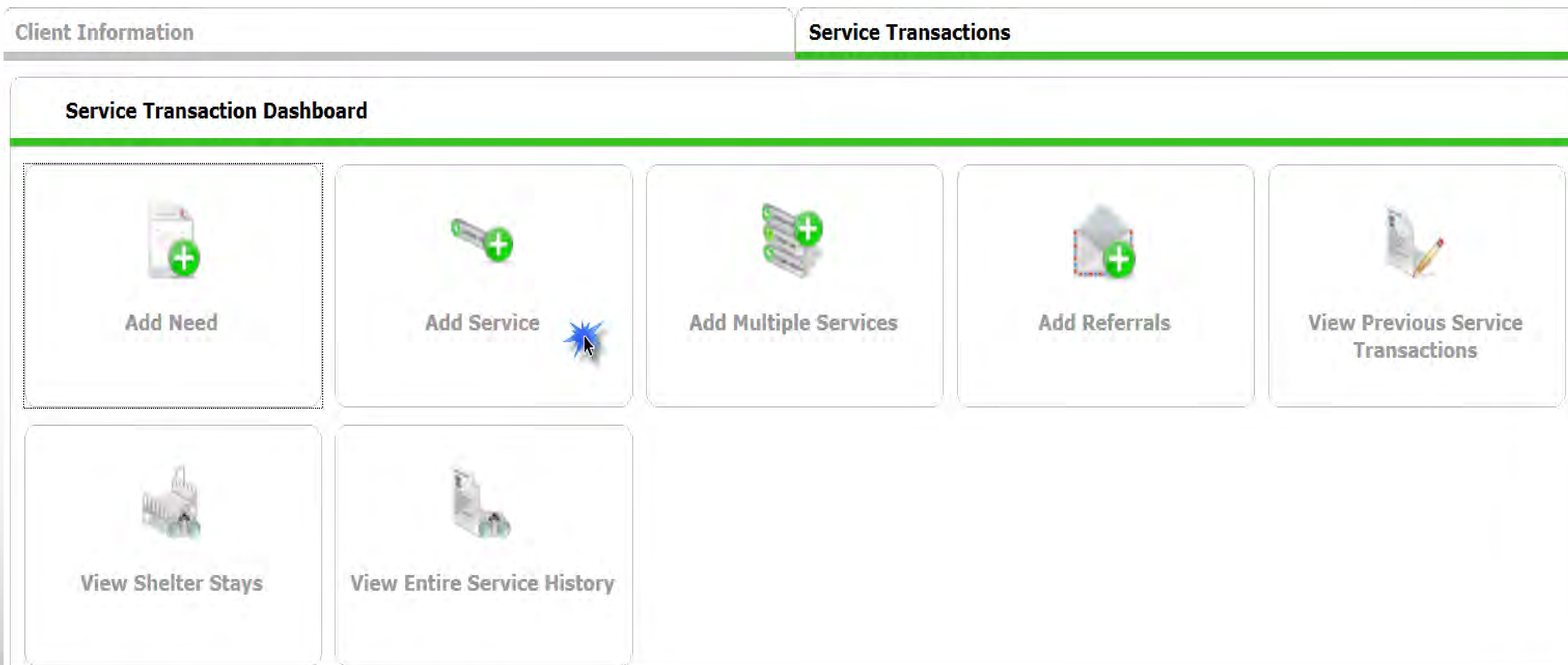
Add Service

- Click Add Service



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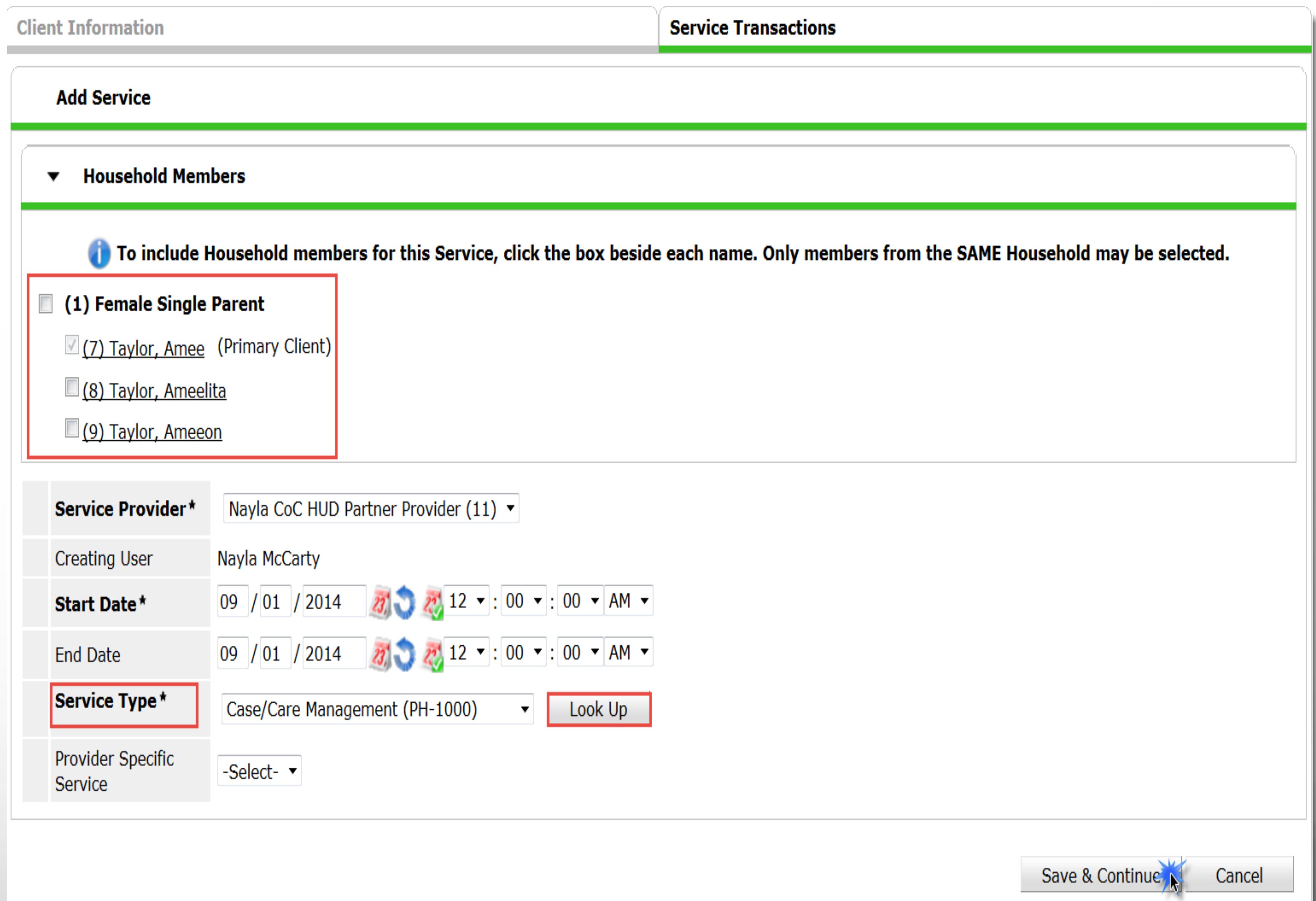
Add Service

Adding initial Service

- Select Household Members as appropriate (check household type to include all family members at once)
- Date and time will default to either Current System date or Back Date
- Select Service Type from the Service Quick List drop down
- Or Look Up Service Code
- Click Save & Continue



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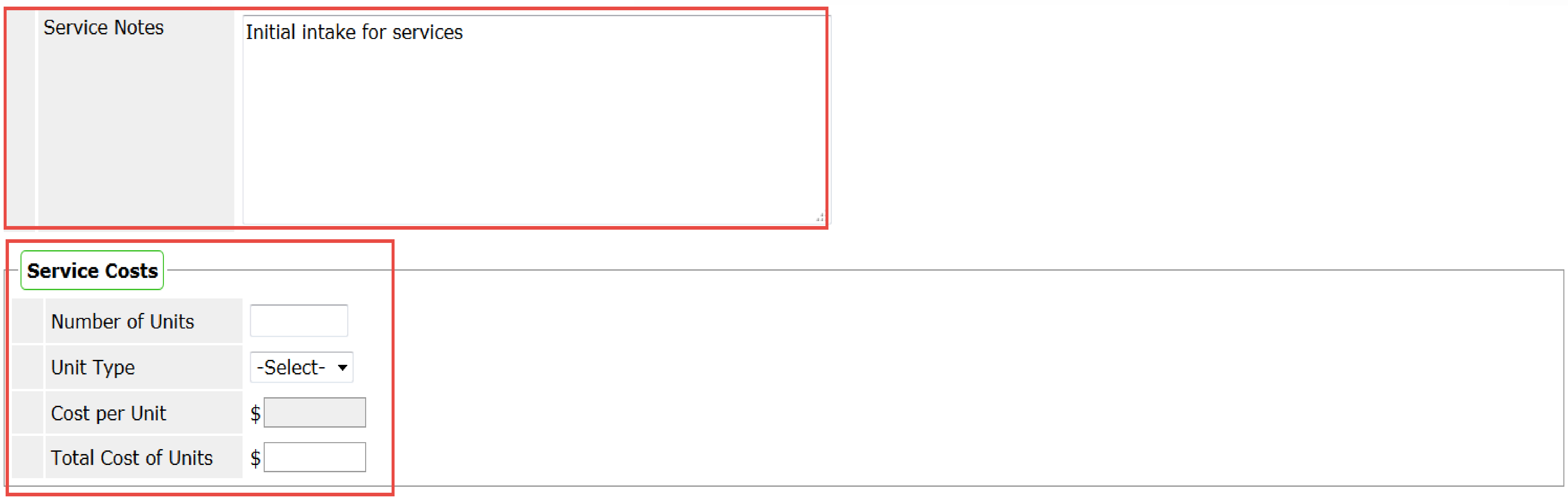
Add Service

Areas on the Service Screen

Once the service is saved, different areas on the service screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

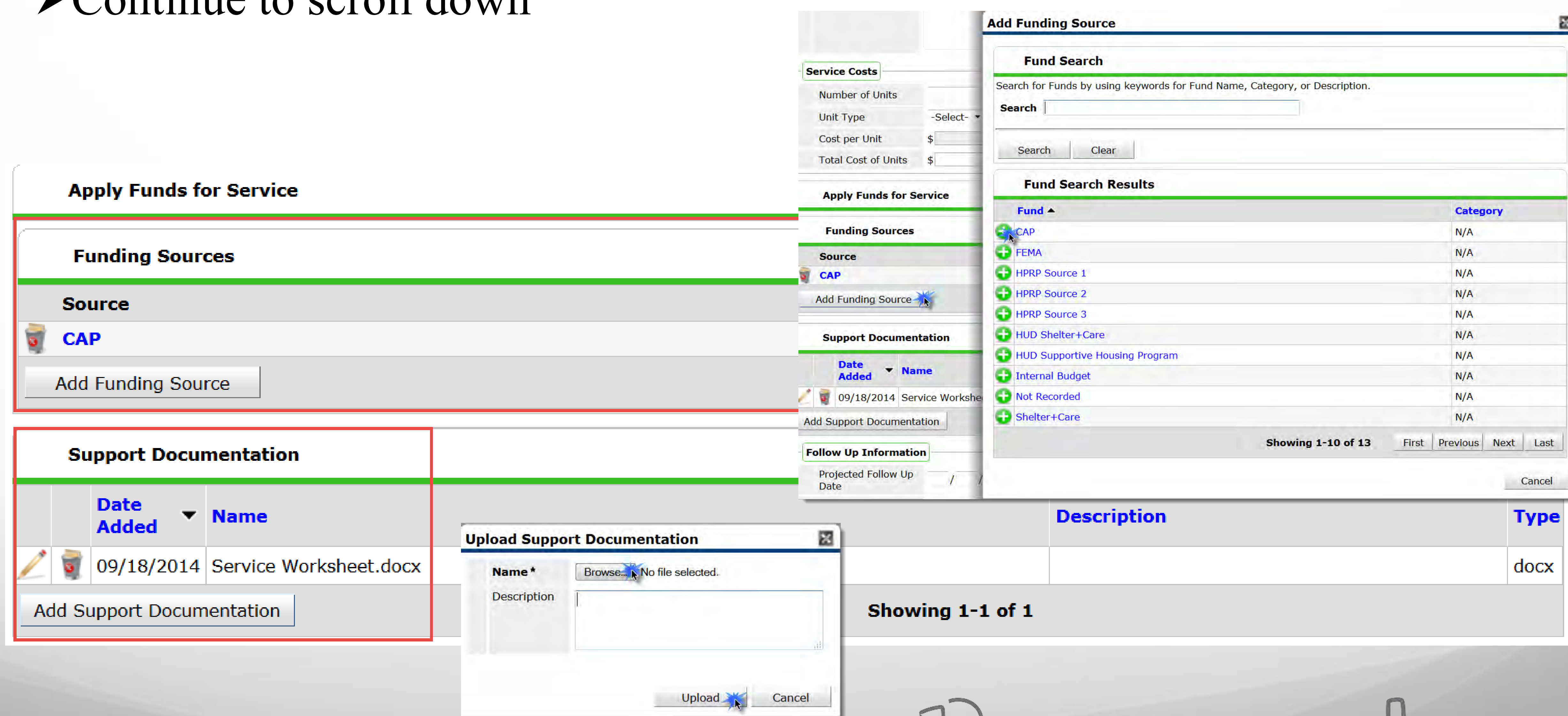
- Add Service Notes as necessary
- If protocol at your organization, add Service Costs.
- Continue to scroll down



Add Service

Continued Areas on the Service Screen

- If protocol at your organization, add Funding Source
- Add Support Documentation as appropriate
- Continue to scroll down



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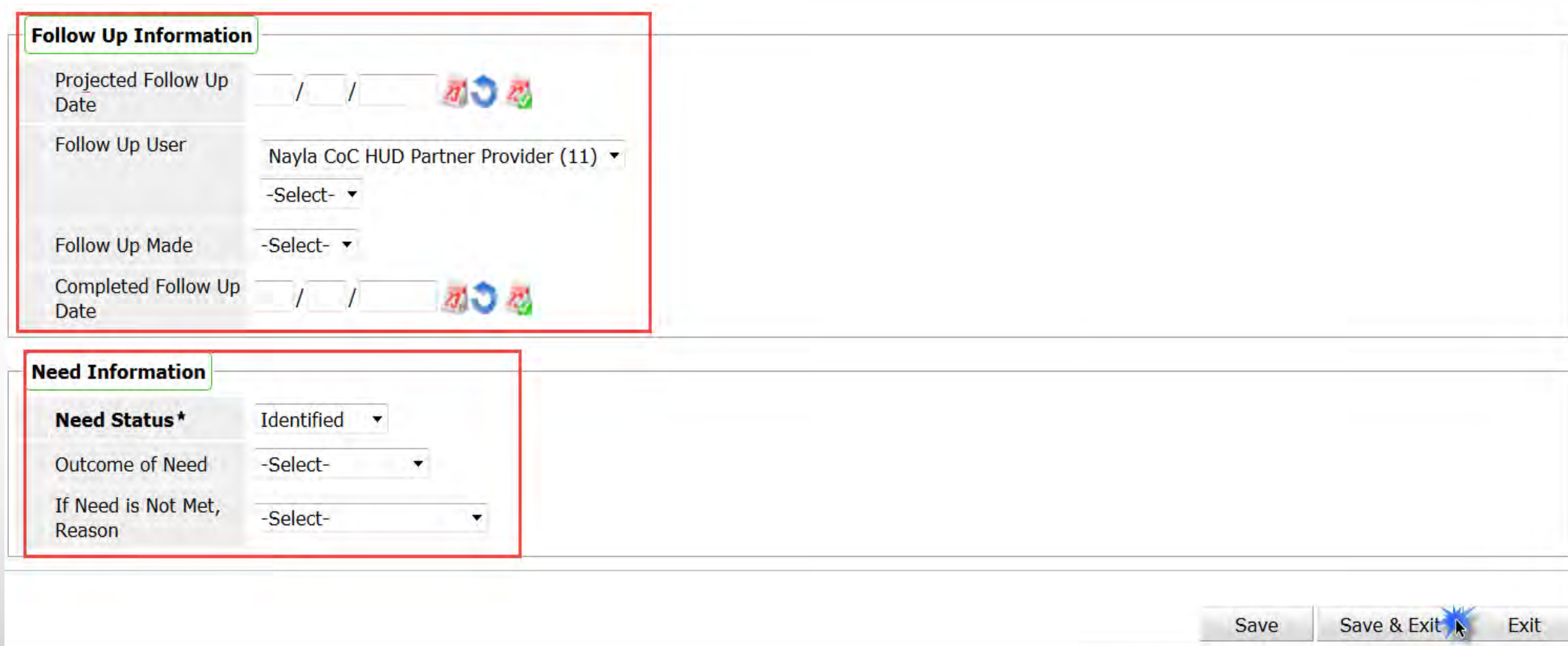
Add Service

Continued Areas on the Service Screen

- Add Follow-Up information as necessary
- Need Information for this service will be AUTOMATICALLY identified. Use the dropdown menu next to Need Status to select the appropriate status.
- Select Outcome of need if appropriate
- Select Reason if not met as appropriate, then click Save & Exit



Add Referral

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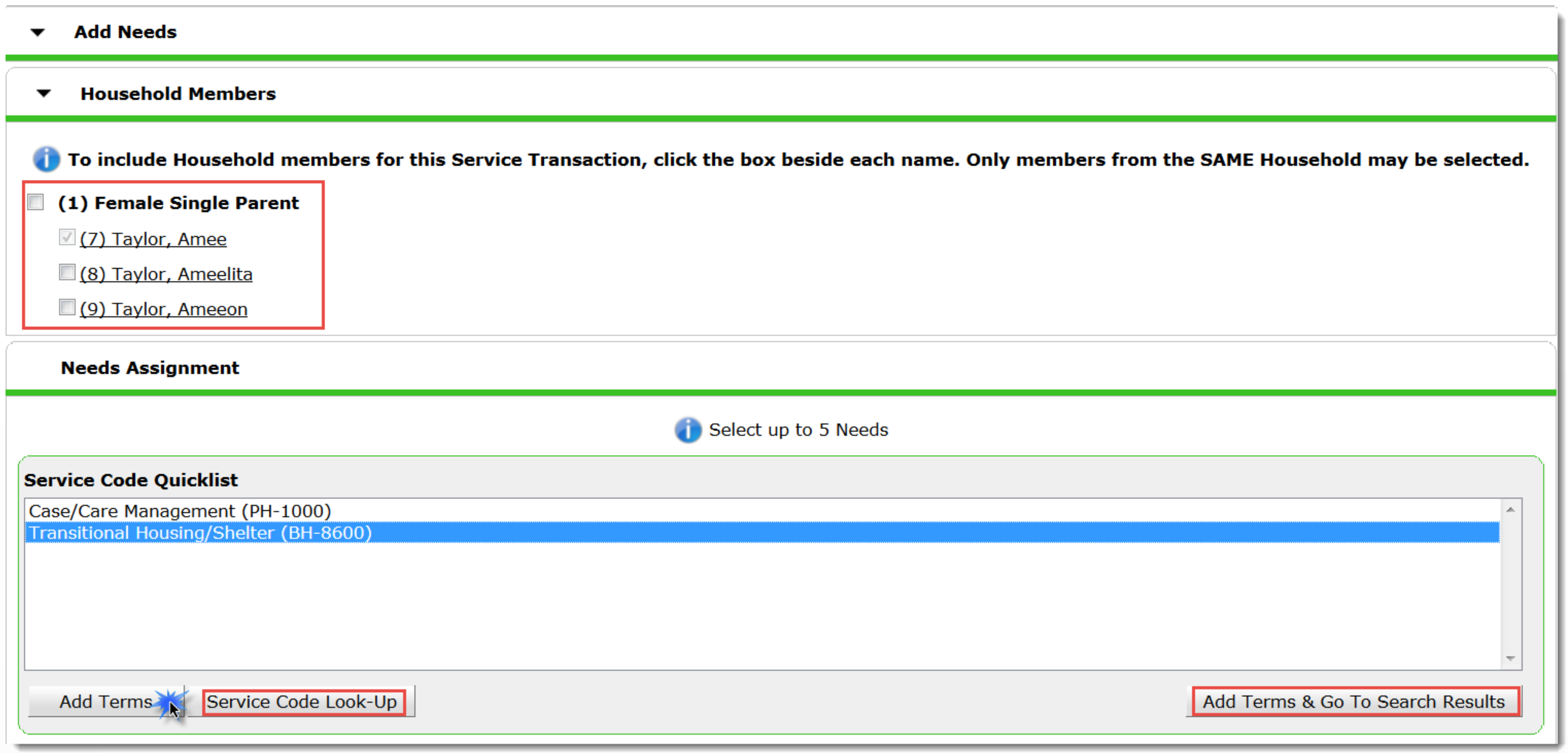

- Return to Service Transactions Dashboard, then click Add Referral
- Select household members as appropriate
- From the Service Code Quick List by highlighting the term then click Add Terms then scroll down, or click Add Terms & Go To Search Results
- OR click Service Code Look-Up

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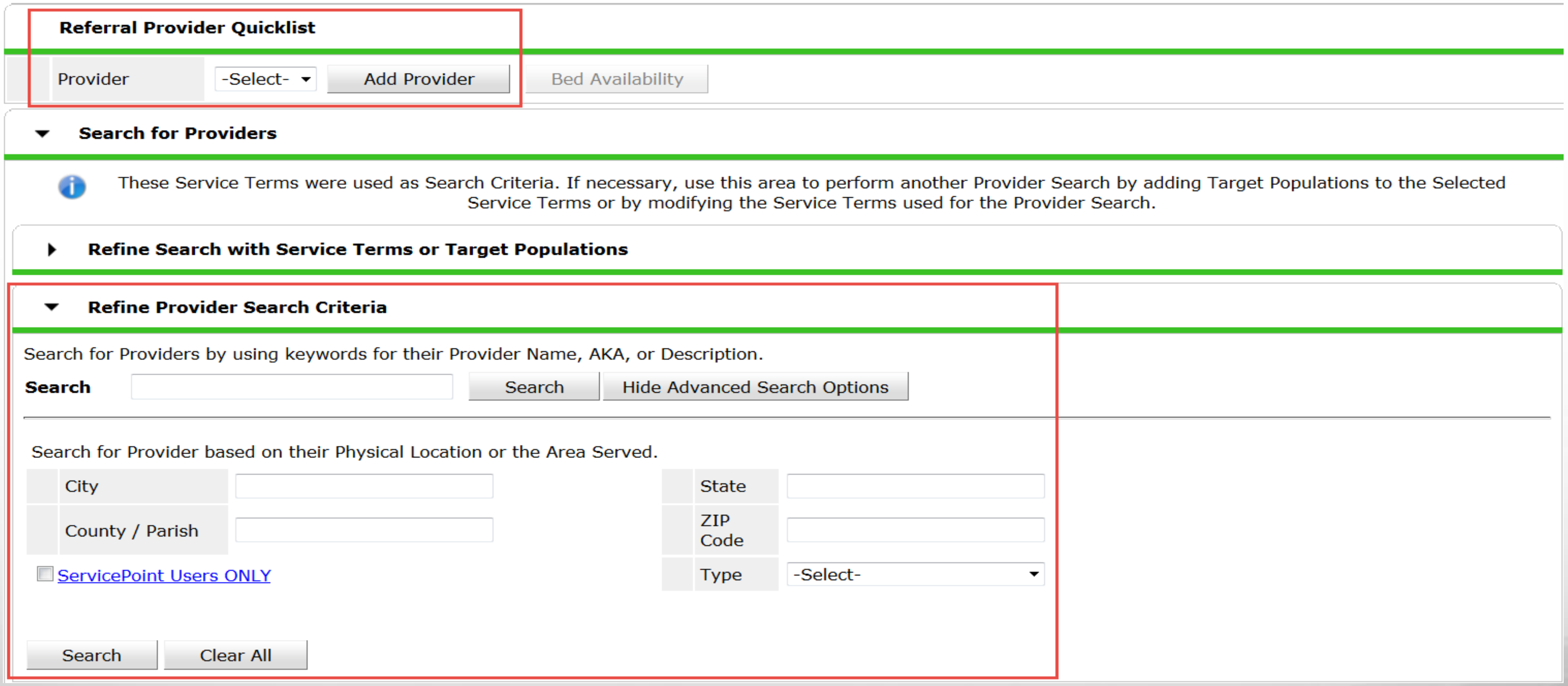
Add Referral

- If setup within your provider, you may have a list of Referral Providers. Click the Provider dropdown arrow to select a provider from the Referral Provider Quicklist
- Users have the option of narrowing based on geography. Use as necessary.



Collaborate. Coordinate. Evaluate.

Add Referral

- Adding Needs at the beginning of the search, will automatically trigger a search for providers.
- Click the name of the provider to view this provider's service information, a new pop-up will appear.
- Matched needs show whether that provider provides the service based on the Need selected
- Click the green circle to select this provider for referral

Search Results

\# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

		Provider	Type	Phone	Location	Distance	Matched Needs
		Nayla CoC HUD Partner Provider	Level 2	Unknown	Unknown	N/A	1/1
		Provider B	Level 3	318-213-8780	Shreveport, LA 71101	N/A	1/1

Bed Availability

Showing 1-2 of 2

Collaborate. Coordinate. Evaluate.

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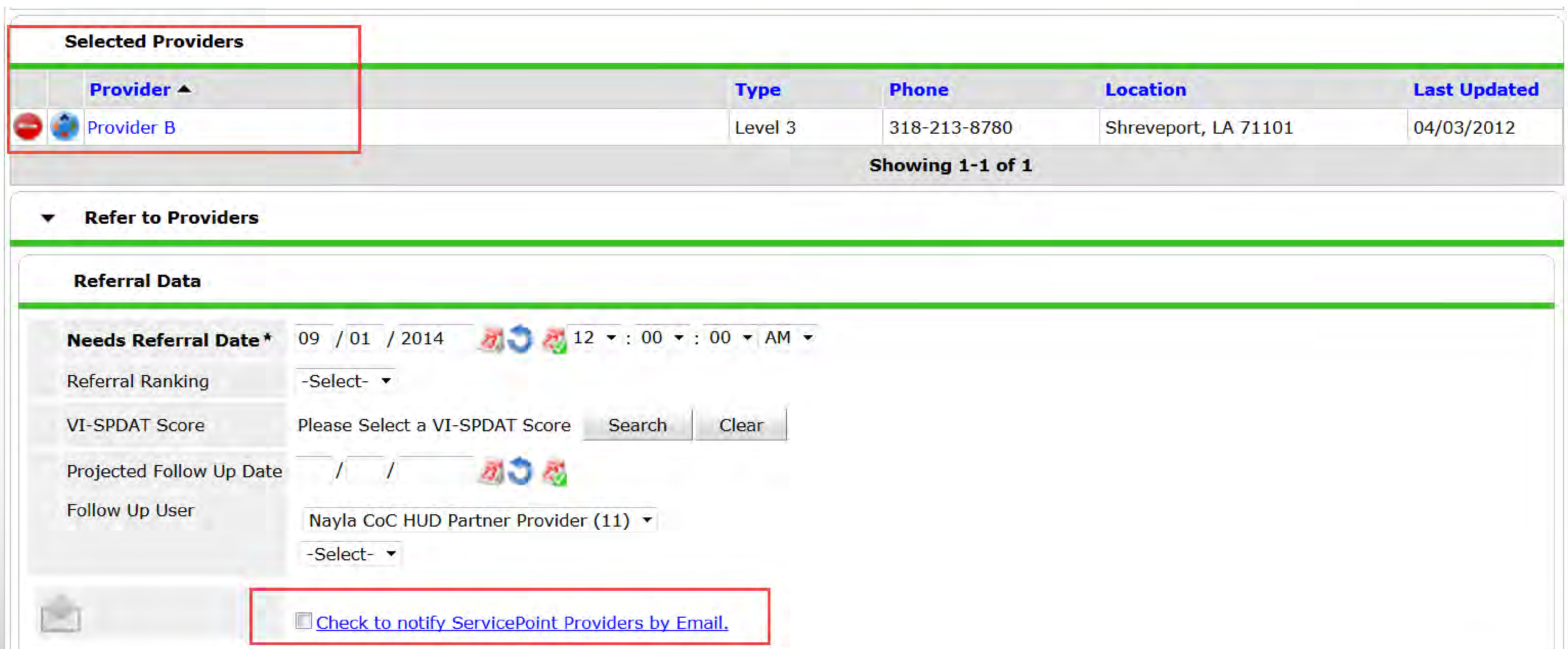
Add Referral

- Referral Provider will appear within Selected Providers once selected
- If the Referral Provider uses ServicePoint, a notification can be sent. Click the box to the left of "Check to notify ServicePoint Providers by Email"



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Add Referral

- Enter Financial need if necessary
- Complete Need Status/Outcome as appropriate
- Click Save ALL! If you click Save Needs ONLY it will ONLY save the needs and NOT the referral.

Referrals Send Summary

Referred-To Provider	Transitional Housing/Shelter	Referred Clients
Provider B (6)	☑	(7) Taylor, Amee

Need Data

Date of Need * 09 / 01 / 2014 12 : 00 : 00 AM

Selected Needs

		Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
		Transitional Housing/Shelter (BH-8600)		Identified -Select- -Select-	

Remove All Needs

Save Needs ONLY | Save ALL | Clear ALL | Cancel

Collaborate. Coordinate. Evaluate.

Entire Service History View

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- Review Historical Transactions!

Navigate **Back to Dashboard**

Client Information | **Service Transactions**

Needs | Services | Referrals | Shelter Stays | **Entire Service History**

All Service Transactions

Select Dates -Select- **Start Date** / / **End Date** / / Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met	
Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Referral	09/01/2014	Provider B	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending	

Showing 1-8 of 8

Collaborate. Coordinate. Evaluate.

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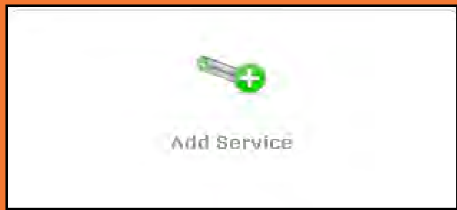

➢Add services quickly by clicking the "Key" icon to the left of Needs within Entire Service History tab.

Client Information | **Service Transactions**

Needs | Services | Referrals | Shelter Stays | **Entire Service History**

All Service Transactions

Select Dates -Select- **Start Date** / / **End Date** / / Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met	
Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Referral	09/01/2014	Provider B	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending	

Showing 1-8 of 8

Collaborate. Coordinate. Evaluate.

BOWMAN systems

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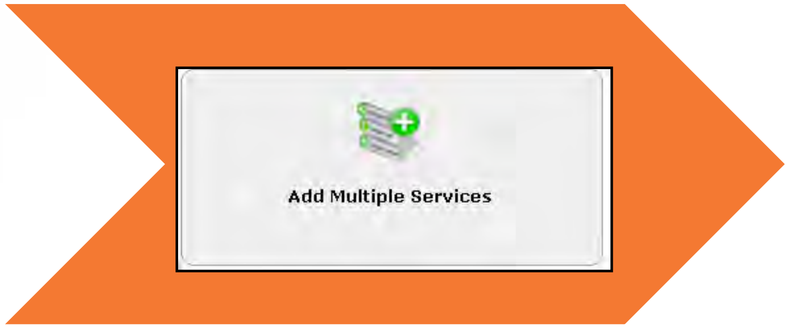

- Click Add Multiple Services within the Service Transactions Dashboard
- Select multiple services at one time

To include Household members for these Services, click the box beside each name. Only members from the SAME Household may be selected.

- [ ] **(1) Female Single Parent**
  - [x] (7) Taylor, Amee
  - [ ] (8) Taylor, Ameelita
  - [ ] (9) Taylor, Ameeon

Multiple Services

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider *	Nayla CoC HUD Partner Provider (11)
Start Date *	09 / 01 / 2014 12 : 00 : 00 AM
End Date	09 / 01 / 2014 12 : 00 : 00 AM

Service List

Number of Services 1 **Need Status** Identified Set All

Number of Services *	1
Service Type	Case/Care Management (PH-1000)

Need Information

Need Status *	Identified

Remove Clear

Number of Services *	1
Service Type	Transitional Housing/Shelter (BH-8600)

Need Information

Need Status *	Identified

Remove Clear

Add Another Remove All Clear All

Save & Exit Cancel

Interim Reviews

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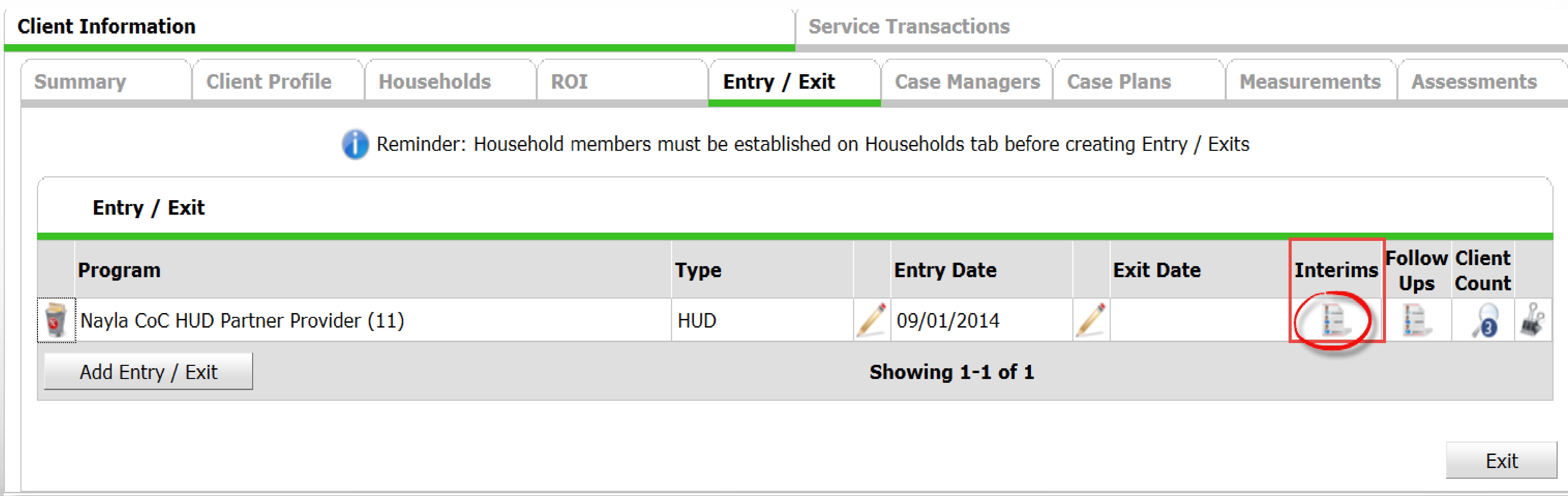
- Interim Review in ServicePoint
  - It may be required that you update information throughout a client's participation in a program (HUD Programs, VA, Etc.)
  - Required Annual Assessments for clients participating in a program for more than 365 days (HUD Programs)
- To create Interim reviews:
  - Go to Client's record
  - Click the Entry/Exit tab
  - Click the "File" icon within Interims for that Entry



Collaborate. Coordinate. Evaluate.

Collaborate. Coordinate. Evaluate.

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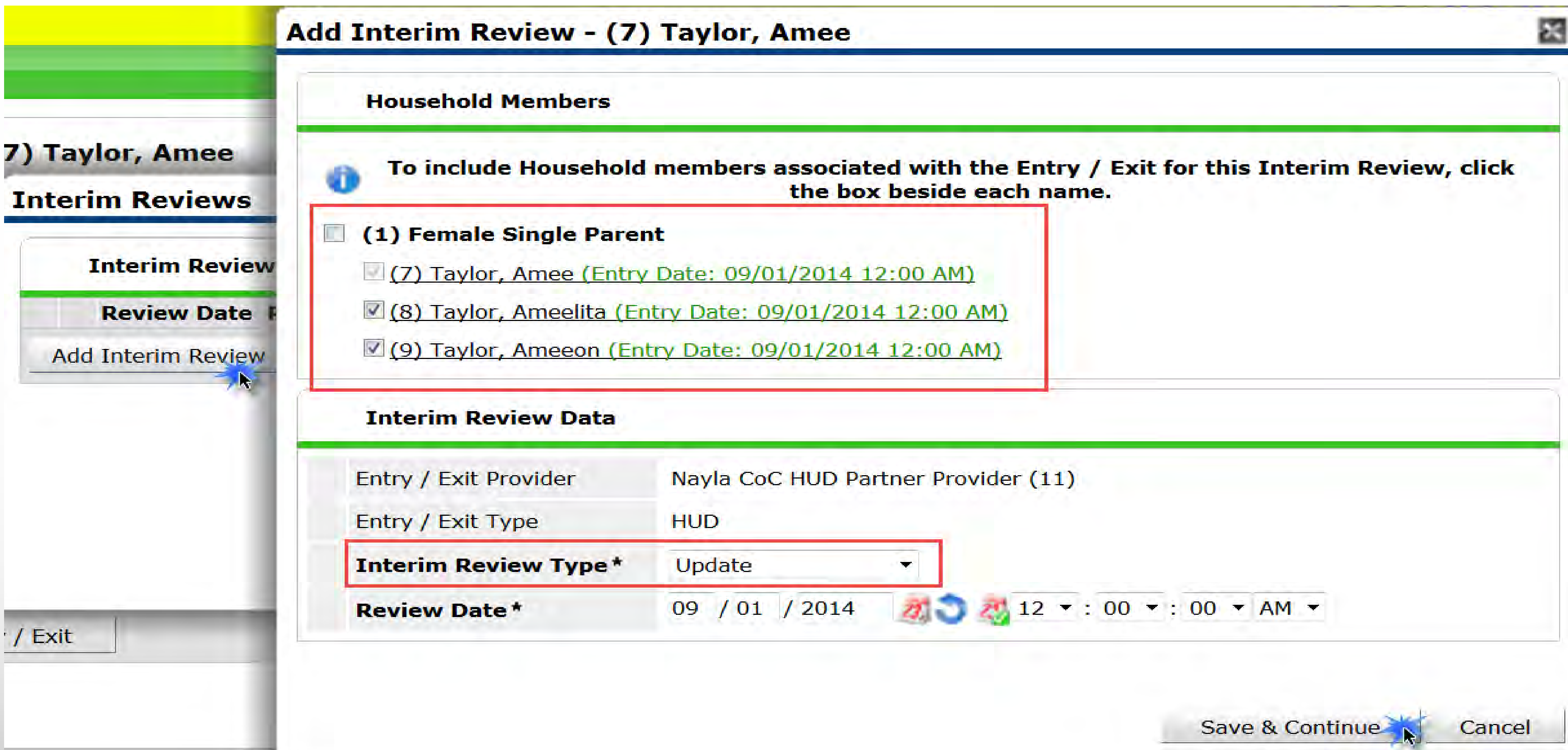
Interim Reviews

- Interim Reviews pop-up will display
- Click Add Interim Review
- All household members within the Entry will already be checked
- Select the Interim Review Type, then click Save & Continue. A new pop-up will display.



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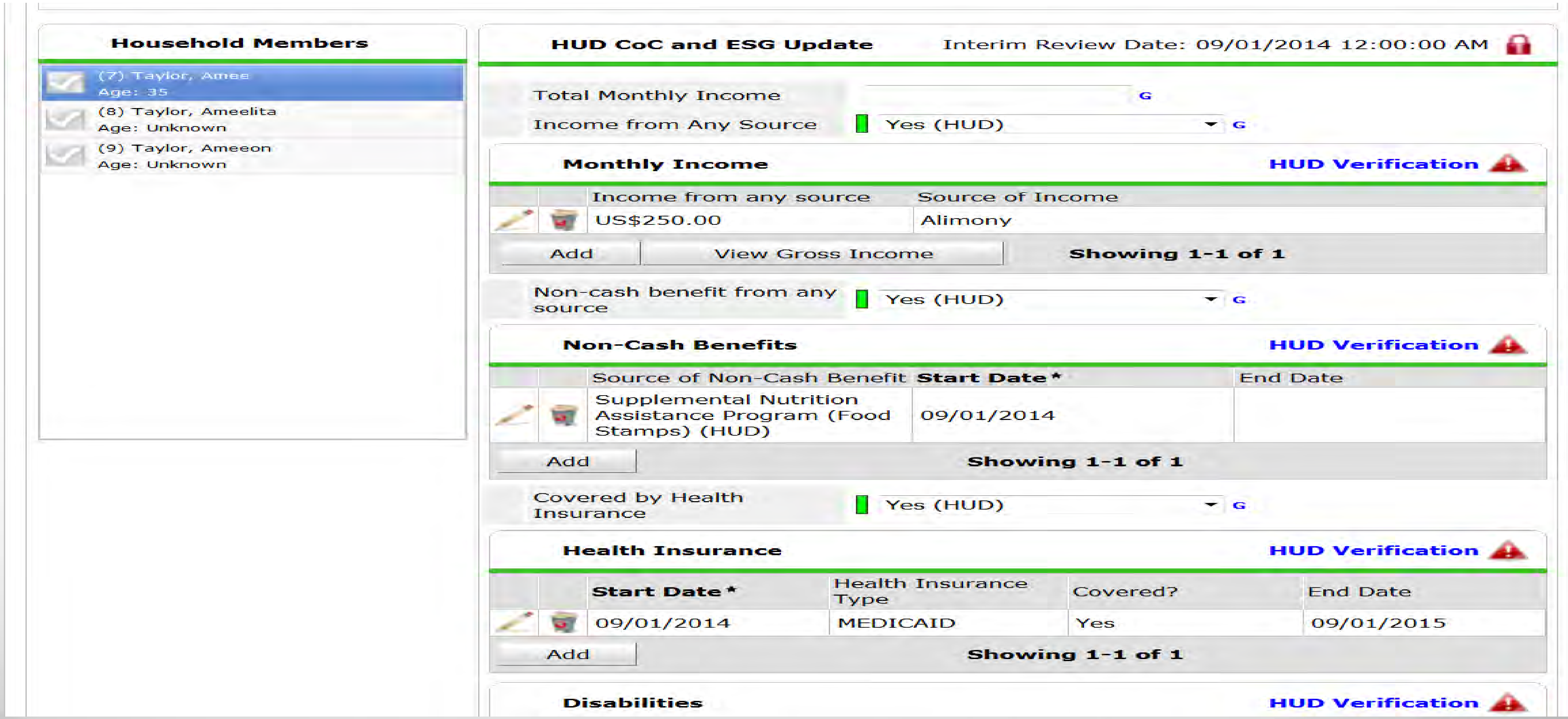
Interim Reviews

- ➢ Complete Assessment as necessary
- ➢ If no changes need to be made, scroll down, then click Save. Click on each household member, then click save. Each will display a green check mark once saved.
- ➢ Click Save & Exit at this time! An Interim will be automatically recorded as soon as you Save! ***For changes, see next slides.***



Interim Reviews

- **Special Note on Interim Reviews:** *Recommended Workflow for Updating Income, Non-Cash Benefits, Health Insurance and Disabilities with the HUD Verification*
  - If Sub-Assessment answers already exist, end date the ones that are no longer true by clicking on their pencil in the preview pane of the sub-assessment (remembering to end date using the prior day)
    - If there are no answers or everything is true, go to the next step.
    - As end dates are entered, the HUD verification icon could change from green to the red triangle.
  - Click on the HUD Verification link which brings up a popup window showing the active answers for that date for each type . If there are more than one answer active for a particular type, the HUD rules are followed so the answer will show as it would in the report.
    - For example, if a Yes and No response are valid, the yes would take precedence per HUD rules.
  - If an answer is incomplete, click on the yes or no as appropriate.
    - Clicking No automatically fills in the response and a start date.
    - Clicking Yes brings up a popup with the Yes response and Start Date but also any other HUD questions that need to be filled out.

Collaborate. Coordinate. Evaluate.

Exit your Client

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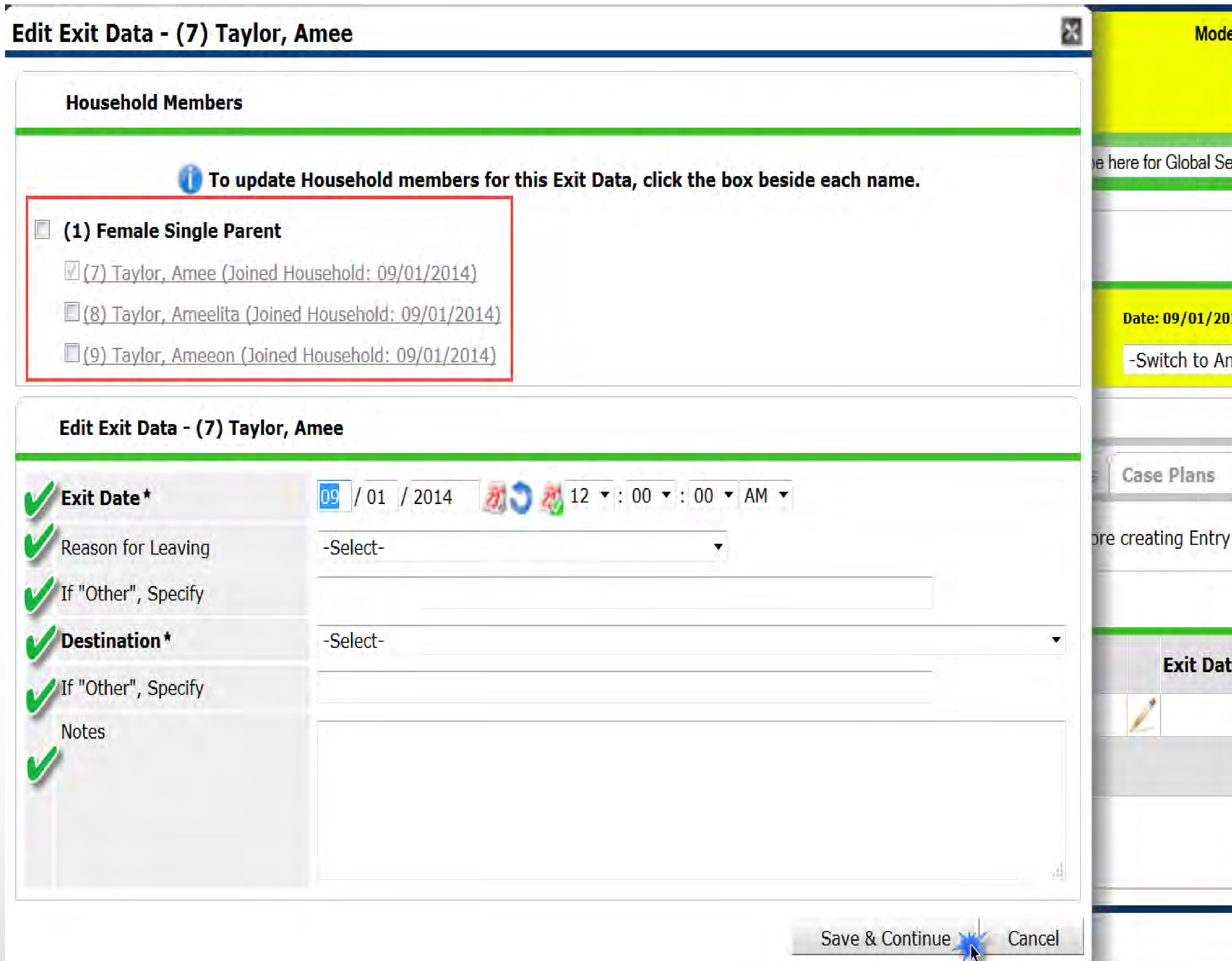
- ➢ Before creating an Exit for your client, ensure that all Service Transactions, Measurements and Case Plans are completed and Closed.
- ➢ End Case Manager relationship by adding an End Date
- ➢ Go to the Entry/Exit tab within the Client Record, then click the Pencil to the left of the Exit Date
- ➢ Select all household members to be Exited (in most cases all!)
- ➢ Complete all fields as necessary
- ➢ Click Save & Continue



Collaborate. Coordinate. Evaluate.

Exit your Client

BOWMAN systems
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- Complete Exit Assessment information for all clients in the household
- Green check marks will appear when each client is saved
- Click Save & Exit when finished

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* Nayla CoC HUD Partner Provider (11)

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
(7) Taylor, Amee	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	
(8) Taylor, Ameelita	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	
(9) Taylor, Ameeon	No	09/01/2014	09/01/2014			Completed program	Rental by client, with other ongoing housing subsidy (HUD)	

Include Additional Household Members

Showing 1-3 of 3

Entry Assessment | **Exit Assessment**

Household Members

(7) Taylor, Amee
Age: 35

(8) Taylor, Ameelita
Age: Unknown

(9) Taylor, Ameeon
Age: Unknown

HUD CoC and ESG Exit Exit Date: 09/01/2014 12:00:00 AM

Total Monthly Income

Income from Any Source: Yes (HUD)

Monthly Income **HUD Verification**

Collaborate. Coordinate. Evaluate.

Follow-Up

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- Follow-Up updates cannot be created until clients have been exited from the program
- To complete a follow-up, click the Entry/Exit Tab within the Client Record
- Click the “File” Icon within the Follow-Ups then follow the same steps as the Interim Reviews, except choose the appropriate Follow-Up Type