



DATA ENTRY WORKFLOW FOR HPRP IN SERVICEPOINT

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SERVICEPOINT WORKFLOW

Bowman Systems recommends the following workflow in order to complete HPRP data entry into our database. Complete data entry maximizes reporting capability for the canned provider reports and template reports in ART. For additional guidance on your program's requirements for reporting on HPRP, please contact your HUD TA or Field Office.

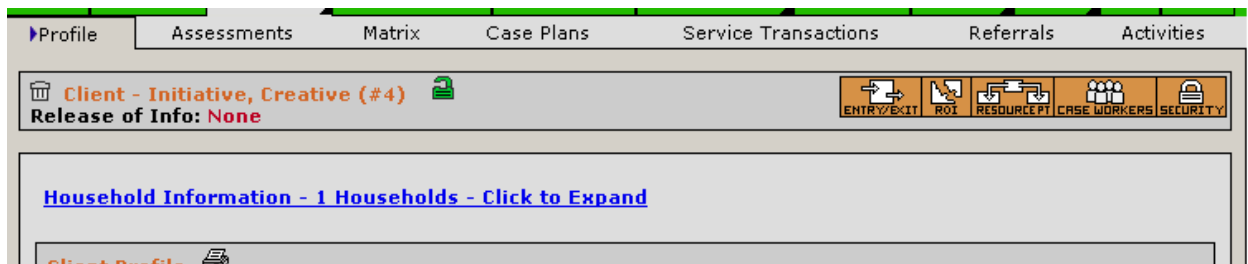
The workflow is divided into the following 4 sections: client arrival, assessment, services and exit.

CLIENT ARRIVAL

Many programs refer to this step as the client's point of entry or intake. This can also be referenced as capturing the client's story at the time they entered your program. For financial assistance programs, you may consider this as pre-screening or eligibility data for your client. The information collected at arrival is generally static and fixed.

Please note: Information may already exist for a client with an existing record in ServicePoint! We recommended that household and information be reviewed and updated for each instance of service to ensure proper data quality in a client's record.

- Click **ClientPoint** – Search the data base for possible matches. Click on an existing record or add the client as new.
- The Profile of the record will load and the client id will display (#).



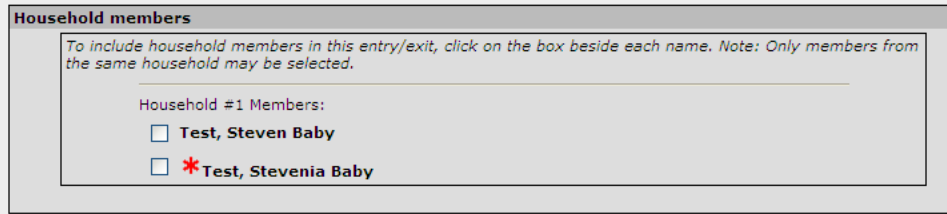
- For clients accompanied by family or household members, complete the [household information](#) before proceeding. It is not necessary to create a household for a single individual for HPRP reporting.
- Click on ROI and Add **Release of Information** (May be optional based on System Preferences)



- Click on **Entry/ Exit Worksheet** and Add a New Entry



- Check the box next to household member names when applicable.



Household members

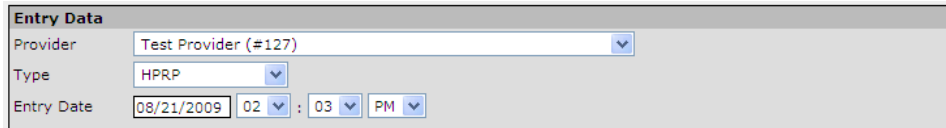
To include household members in this entry/exit, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

Test, Steven Baby

*Test, Stevenia Baby

- Complete the Entry Data:



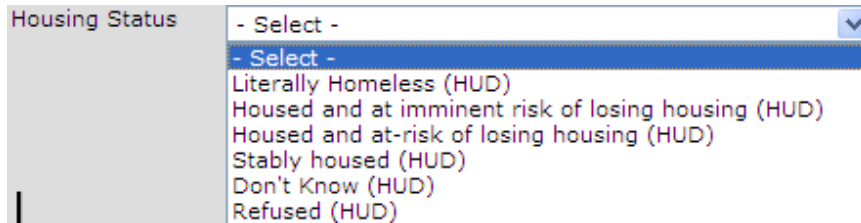
Entry Data

Provider: Test Provider (#127)

Type: HPRP

Entry Date: 08/21/2009 02 : 03 PM



- Select the **Provider** from the drop down menu.
- Choose Type: **HPRP**
- Enter the **date** of the client’s entry into your program (intake, point of arrival).
- Complete the data entry questionnaire. * **At a minimum, the Housing Status Question MUST be answered at ENTRY.**



Housing Status

- Select -
- Select -
- Literally Homeless (HUD)
- Housed and at imminent risk of losing housing (HUD)
- Housed and at-risk of losing housing (HUD)
- Stably housed (HUD)
- Don't Know (HUD)
- Refused (HUD)

- The most recent (existing) assessment information will be populated in the client’s record when opening a new worksheet. You may or may not be set up to view all data elements on this worksheet, although *we recommend that you configure your HPRP Assessment Questions to “Show on Entry” so that all necessary assessment values are captured directly on this worksheet.*
- **If the required HPRP data elements are not visible on the entry exit worksheet, the values will not be recorded as “entry objects” and you may have reporting values that do not populate correctly. * At a minimum, the Housing Status Question MUST be answered at ENTRY.**
- Be sure to check existing data for accuracy as of the client’s entry into your program. Make any necessary changes to the questions to reflect the client’s status as of the date of arrival to your program. Save your changes!
- Where changes in a sub-assessment are necessary, i.e. income or non-cash benefits, click the pencil to **end date values that are no longer true** and **add** a new record to update the values with the entry date as the “start date” of the sub-assessment.

Non-Cash Benefits			
Source of Non-Cash Benefit	Start Date	End Date	
 Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	08/05/2009		
Showing Rows 1-1 of 1			
Show Entire List In Window			

- Save.
- For each household member, click the pencil on the entry date and complete the worksheet! Save Changes.

Overview - HPRP			
Name	Entry Date	Exit Date	F
▶ Initiative, Creative	 08/20/2009		
Initiative, Little	 08/20/2009		

- Save and Close when all household members have had the data on their worksheet completed.

SERVICES

Service Transactions and additional information can be added or captured at anytime during a client's relationship with your program. When a client begins receiving services such as case management or financial assistance, Service Transactions must be created!

- Click Service Transactions
 - Click "enter **multiple services**"
 - Check box next to **household members** when applicable.
 - Select your program from the **provider** list.
 - Enter a **Start Date** for the service. In general, your service start dates will be on or after the entry date above. For ongoing assistance, the start and end date may reflect dates of service that the assistance applies to. I.e. Rental Assistance for 1 month could start on the first of the month and end on the last day of the month.
 - Enter an **End Date** for the service, if available at the time of data entry.
 - Enter the **Number of Services**. This is often **1** (one).
 - Select the service you will be providing from the quick list. (*OPTIONAL*: This will **default** your "need and service" to the AIRS taxonomy code: **basic needs**).
 - CHOOSE THE APPROPRIATE ACTIVITY RELATED TO HPRP ACTIVITY.
 - **HPRP Housing Relocation and Stabilization Service**
 - Or
 - **HPRP Financial Assistance Type**

- **ServicePoint will not allow a User to have both fields filled out.**
 - Choose Sources of funding (*OPTIONAL*) and enter Cost of Service for selected sources.
 - Enter a Unit # and Type (*OPTIONAL*)
 - Enter **status and outcome**. *In general, your service start dates will be on or after the entry date above. If the service will be ongoing, you may leave the end date blank and the status “in progress”. If the service ends on the same date it begins, enter the end date and set the status to “closed”. Save.*

Services

Household members

To include household members in these services, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

* **Initiative, Little**

Multiple Services

Warning: 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 reentered.

Provider: Professional Services (#1)

Service Start Date: 08/17/2009 08 : 45 AM

Service End Date: 08/17/2009 08 : 45 AM

Service List # of Services: 1 Status: Identified

# of Services	1	Service	-Select-
HPRP Housing Relocation & Stabilization Service Provided	-Select-		
HPRP Financial Assistance Type	-Select-		
Source 1	-Select-	Cost of Service 1	<input type="text"/>
Source 2	-Select-	Cost of Service 2	<input type="text"/>
# of Units	<input type="text"/>	Unit Type	-Select-
Status	Identified	Cost of Unit	<input type="text"/>
Outcome	-Select-	If Need Not Met, Reason	-Select-

ASSESSMENTS



Assessments are used in ServicePoint to collect information in a client's record. The "HPRP" Assessment contains the questions from the HPRP funding guidelines (based on HUD's "Homeless Management Information System (HMIS) Data Standards Revised Draft Notice" - June 2009.) This data should be collected for each client based on the federal standard. For complete detail, please reference 4.06 Release Notes V2 and the Draft Notice. It is recommended that some of these data elements be

reviewed every 30 days. In addition, questions from other funding sources may be answered at the time of data entry for HPRP. Assessments are configured in Assessment Administration in ServicePoint. HPRP questions should be completed from the “Entry Worksheet” (see HPRP Assessment Entry Object from above*), however, you may need to fill out additional questions in a client’s record by moving to the assessments screen in ServicePoint. Additionally, when a client receives new income sources or has provided you with updated circumstances you may add the new information to their Assessment or update existing values with the appropriate information.

- Click on Assessments – be sure to set the date. In general you will use the date that your agency learned the information about the client for the “assessment date”.
- If the information was true at entry, use the entry date! **Back date when necessary.** Answer any questions that apply for HPRP Standards or your Agencies program specific data elements. Save. (Enter data for all family members when applicable)
- Income, Non-Cash Benefits and Disability sub-assessments require “Start and End Dates”. To ensure accurate data quality, remember to “end date” income sub-assessments where information is no longer true for a client. If a new source exists, please add a new sub-assessment with the data rather than overwriting information in an existing record. When end dating sub-assessment record sets, be sure to answer any corresponding data elements to reflect the change of data.

For Example: If you answer “No” to update Non-cash benefit received in past 30 days, you should also End Date the record set in the sub-assessment below.

Non-cash benefit received in past 30 days? No (HUD) H G

Non-Cash Benefits				Add
Source of Non-Cash Benefit	Start Date	End Date		
 Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	06/01/2009	08/01/2009		
Showing Rows 1-1 of 1				
				Show Entire List In Window


- **Save any changes you make to the assessment!**

CLIENT EXIT

In order to evaluate your program, you need to show any changes that may have occurred with your client’s during their time receiving services from your program. Use the exit dates to determine length of stay and changes over time. For HPRP, there are 2 places where you need to check a record for completion at the client’s exit, the Exit Worksheet and In Progress Service Transactions.

- Click on Service Transactions – click on the pencil of the service you would like to end. Enter the end date and change the status to “closed”. You may also edit the outcome of the need related to the service at this time.

AND

- Click on Entry/ Exit Worksheet and click on the Exit pencil for the current stay.  Fill in the client’s exit destination and reason for leaving. Update the exit data on the worksheet. Remember, the most recent assessment values will auto populate, so if you have been updating the client’s assessment during their stay, this information will be more accurate. Make sure to end date any sub assessment information that is no longer true and create new sub assessments to track information that is true as of the client’s exit in your program.

CHECK LIST

- ✓ Enter Client into ServicePoint
- ✓ Enter Household Member Information
- ✓ Enter ROI where Applicable
- ✓ Create HPRP Entry / Exit worksheet
- ✓ Answer: Housing Status on ENTRY worksheet and other assessment questions.
- ✓ Create Service Transaction with HPRP Related Activity Selected
- ✓ Update Assessment Information (using backdate where applicable) and ensuring that all Universal Data Elements have responses.
- ✓ End Date Services
- ✓ Click Pencil on Client’s HPRP Exit Date and enter Destination and Reason for Leaving
- ✓ Update Assessment Information on the Exit Worksheet.
- ✓ Save Changes
- ✓ Run Data Quality Reports Regularly!

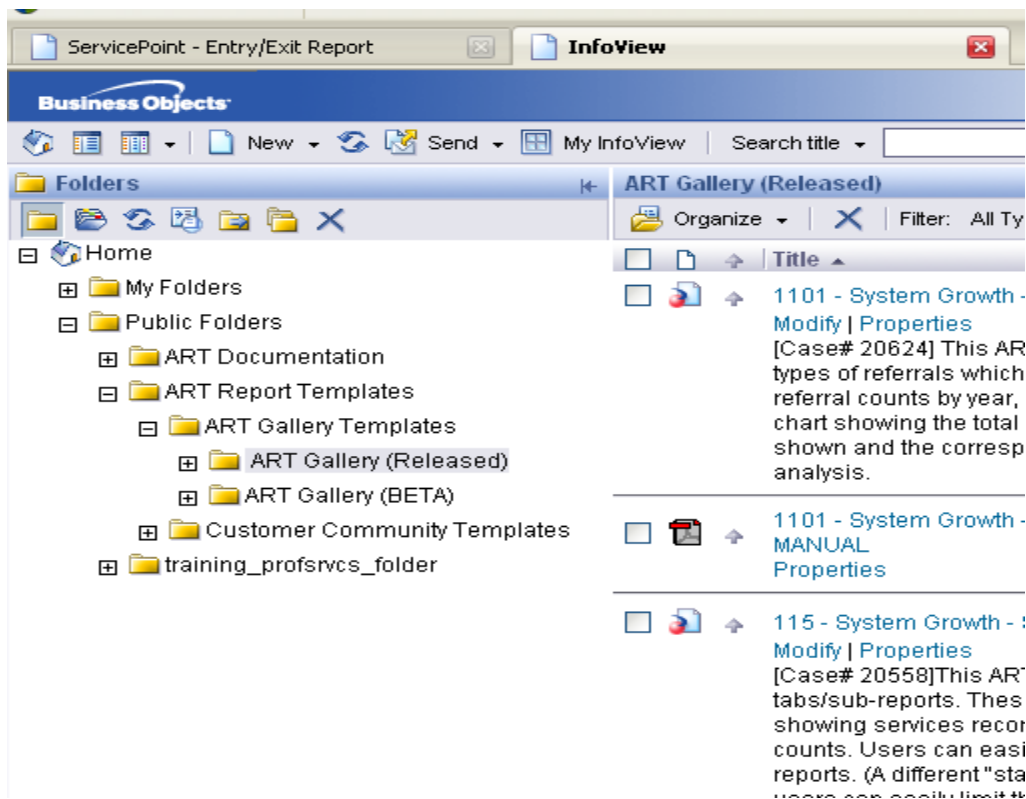
REPORTING

ART Reports:

The QPR and other HPRP related reports will be available in ART. The report will be in the form of a template. An Ad-hoc ART user **must template the report** to your database.

Use the “ART GUIDE TO USING TEMPLATES” for more complete instructions on using template reports.

Once the report has been mapped to your database, it can be saved in a public art folder for report viewer’s to run at their agency level. Below is a screenshot of the folder which will contain the report.



Provider Reports:

The above workflow contains the necessary components of a client’s record to generate ServicePoint Provider Reports as well. The Service Transactions will allow you to generate the “**Client Served**” report and the Entry/ Exit worksheets in combination with the Service Transactions will allow you to generate an “**Entry/ Exit Report**” using the HPRP Entry / Exit Type when generating the report.

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