



NC's Balance of State Homeless Management Information System (HMIS)

Carolina Homeless Information Network

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HMIS Training Guide-End-Users Project Homeless Connect

	PAGE
Logging Into the System	2
Home Page	3
ClientPoint – Add/Find Client Files	4
Client Files – Entering Client Data (Profile)	5
Client Files – Creating Households	6
Client Files – Entering Client Consent (ROI)	8
Client Files – Enrolling clients in programs (Entry/Exit)	9
Client Files – Exiting a client from a program	11
LIVE SITE ADDRESS – https://chin.servicept.com	

Use this training guide when you are entering data AFTER the date of the Project Homeless Connect event in your community.



Logging In

Step 1 – Log into training site
Enter your user name
and your one-time use password

NEVER allow your password to be “remembered”. This is not secure and will cause problems when you have to reset your password.

Password Expiration

When you see this screen it means that your password has expired.

Create a new one and enter it in BOTH fields.

Your password will expire every 45 days.
The first time you do this you will see the user license agreement. Review it and click Accept.

Password

Passwords must:

- have at least 8 characters
- have at least 2 numbers
- have at least 1 capital letter
- not be your name, your agency’s name, or a common work spelled forward or backwards

In ServicePoint you will have to change your password every 45 days.

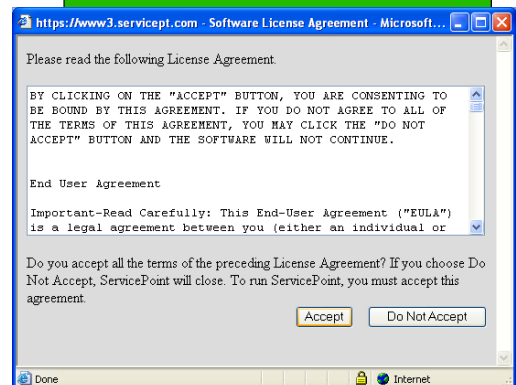
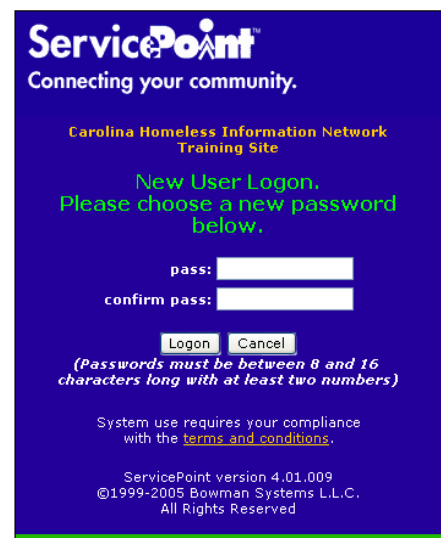
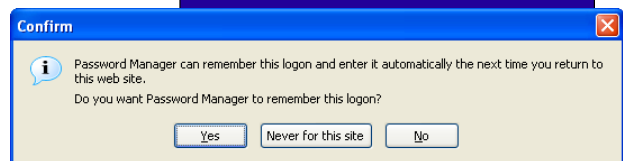
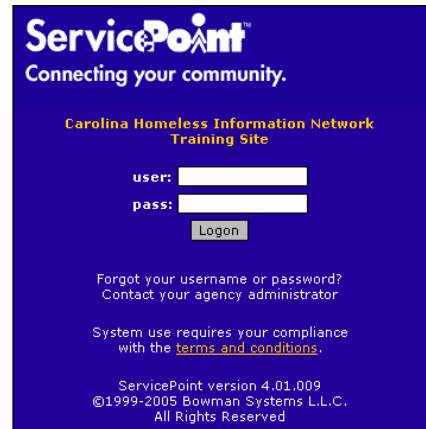
You cannot go back and forth between 2 passwords but you can cycle through 3 passwords.

ServicePoint will lock you out of the system if you try more than 3 combinations of username and password without getting your’s correct.

Contact CHIN to have your password reset once you’ve been locked out of the system.

1st password:

2nd password:





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3rd password:

4th password: same as 1st password

Navigation and Homepage Content

ServicePoint Carolina Homeless Information Network Training Site Jan 13, 2006
Connecting your community. ABC Agency /
Click [here](#) to enter data as another provider.

Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Admin Help Logoff

Navigate

- [ClientPoint](#) - Add, edit or view client profile, client assessments, or add, edit, or view service transactions
- [ResourcePoint](#) - Find community resources
- [Shelterpoint](#) - Check housing availability in your community.
- [Reports](#) - View standard reports, or generate custom reports.
- [Newsflash](#) - View or post newsflashes for your agency
- [Help](#) - Visit the help area for assistance in using the system.
- [Administration](#) - Maintain ServicePoint™ (administrator access only)

Followup List

Type	Date	Time Remaining
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NewsFlash - System
There is no news at this time.

NewsFlash - Agency
There is no news at this time.

ServicePoint version 4.01.009 (db build #0694)
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ClientPoint – Searching for/Adding a client

This is where you begin using the HMIS to collect client level data.

You may find a client's file using the Add/Find button or by entering the client's system generate id number in the Scan or Enter Client id field.

TO GET TO THIS PAGE – click on the ClientPoint tab.

Step 1 – Type in the client's last name. *Be careful to spell the names correctly.*

Step 2 – Look at the TOP of the screen for Possible Matches. *ALWAYS LOOK UP and click on the client's name whenever possible.*

Step 3 – If there are no Possible Matches click on Add Client With This Information to create a new client file.

NOTE: Do NOT use the Add As Anonymous Client button.

Connecting your community. Coronavirus Homeless Information Network

Home > ClientPoint > ResourcePoint > ShelterPoint > ScanPoint > Reports > Admin > Help > Logoff

Search Using Client ID.

Scan or Enter Client id Search this id Delete this id

Search for Existing Client

Search for client before adding a new client.

Last Profile:

First: MI Last: Suffix:

SS#: - -

Search Filter:

- Exact Match?
- Search only active clients?
- Search only inactive/deleted clients?
- Search all clients?

Search For Client

Client Demographics

Information contained in the following fields will be carried forward to the next screen and is also used when adding a client.

SSN Data Quality:

Date of Birth: (mm/dd/yyyy)

Gender:

Primary Race:

Secondary Race:

Ethnicity:

Search For Client Add An Anonymous Client

Possible Matches (refine your results or add as new below) showing 1 - 1 of 1 (<<First <Prev >Next >>Last>>)

Name	SS#	Date of Birth	Gender	Banned
* gMouse, Mickey (#4120)	123-45-6789	01/01/1920	Male	10/12/2007

showing 1 - 1 of 1 (<<First <Prev >Next >>Last>>)

Search Using Client ID.

Scan or Enter Client id Search this id Delete this id

Add as New or Refine Search

Change your criteria and Search for client to reduce the potential matches.

Last Profile:

First: MI Last: Suffix:

SS#: - -

Search Filter:

- Exact Match?
- Search only active clients?
- Search only inactive/deleted clients?
- Search all clients?

Search For Client

Client Demographics

SSN Data Quality:

Date of Birth: (mm/dd/yyyy)

Gender:

Primary Race:

Secondary Race:

Ethnicity:



Profile – This screen may be different for each agency.

TO GET TO THIS SCREEN – It will come up whenever you click on the client’s name from the Add/Find screen, when you click on Add client with this information, OR when you click on the Profile tab within a client’s file.

Notice that the name, and any other information you entered in the Add/Find screen carried over to the Profile.

If you are adding to an existing file, some of the information you saw in the Possible Matches might not be visible on the Profile. This is because the client did not give another agency permission to share the file. Be VERY CAREFUL entering the date of birth, ethnicity, and gender. If you make a typo it will affect other agencies.

Client Profile
 Card Orientation: 1 | Issue ID Card | Save Changes | Exit

Added to System: Jan 04 2006 08:44AM

First: Horton MI Last: Elephant Suffix:

SS#: 110 - 11 - 0011

SSN Data Quality: Full SSN Reported (HUD)

Age: 45

Universal Elements | Save Changes

Assessment Date: 01/04/2006 01:13 PM | Back Date

Date of Birth: 01/01/1961 (mm/dd/yyyy) H G

Gender: Male H G

Ethnicity: - Select - H G

Primary Race: Asian (HUD) H G

Secondary Race: - Select - H G

U.S. Military Veteran?: No (HUD) H G

Zip Code of Last Permanent Address: 28210 H G

Zip data quality: Full Zip Code Recorded (HUD) H G

Driver's License Number: 9685429 H G

Issuing State for ID: North Carolina H G

Non-confidential notes: Has a long trunk

Step 1 – Answer the SSN Data Quality question

Step 2 – In the Assessment Date box, type the date of your Project Homeless Connect event and click on Back Date. Click OK when it asks you if you want to enter historical data. Sections of the screen will turn yellow.

Client Profile
 Card Orientation: 1 | Issue ID Card | Save Changes | Exit

Added to System: Sep 27 2007 02:20PM

First: Monday MI Last: Client Suffix:

SS#: 357 - 65 - 4654

SSN Data Quality: Full SSN Reported (HUD)

Age: 62

Universal Elements | Save Changes

Assessment Date: 09/01/2007 02:20 PM | Back Date

Date of Birth: 06/07/1945 (mm/dd/yyyy) H G

NOTE: You should do this on the FIRST client after you log in. You will stay in Back Date mode until you click on Return to Live Mode.

Step 3 – Enter the information on the Profile screen

Step 4 - Creating Households (see next page)

Client Profile
 Card Orientation: 1 | Issue ID Card | Save Changes | Exit

Added to System: Sep 27 2007 02:20PM

First: Monday MI Last: Client Suffix:

SS#: 357 - 65 - 4654

SSN Data Quality: Full SSN Reported (HUD)

Age: 62

Universal Elements | Save Changes | **(Backdate Mode) Return to Live Mode**

Assessment Date: 09/01/2007 12:01 AM | Back Date

Date of Birth: 06/04/1974 (mm/dd/yyyy) H G

Gender: Male H G

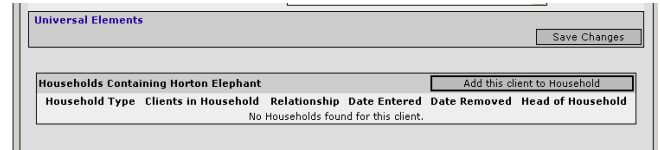
Ethnicity: Other (Non-Hispanic/Latino) H G

Primary Race: White (HUD) H G



Creating Households

You should create a household when a client is living with or sharing custody of their dependents. You do not need to create a household for a SINGLE individual.



TO GET TO THIS SCREEN – scroll to the bottom of the Profile page and click on Add this client to Household.

Step 1 - From the bottom of the Profile screen Click on Add This Client to Household

Step 2 - Select the type of household, if the client is the head of the household, and the client’s relationship to the household.

BACK DATE NOTE – Make sure the Date Entered matches the date of the PHC event.

Step 3 – Click Start NEW Household (DO NOT CLICK Add to Existing Household)

Step 4 – Search for the client you want to add to the household by entering their name and clicking on Add/Find



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Step 5 – Select the client from the Possible Matches

Overview - Type: Couple With No Children, # Clients: 1 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
▶ Elephant, Horton	Self	01/04/2006		Yes

Possible Matches *(refine your results or add as new below)*

Name	SS#	Date of Birth	Gender
No matching Clients found.			

showing 0-0 of 0

or

Enter the additional demographic information and click Add (the new) Client with This Information

Add as New or Refine Search

First * MI Last * Suffix

SS# * - -

SSN Data Quality

Date of Birth (mm/dd/yyyy)

Gender

Primary Race

Secondary Race

Ethnicity

Search Filter Exact Match?

Step 6 – Select whether or not the added client is the head of household, select the added client’s relationship to the head of household, and click Add Household Member

Add Clients To Household - (Horton Elephant)

Overview - Type: Couple With No Children, # Clients: 1 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
▶ Elephant, Horton	Self	01/04/2006		Yes

Continue Adding Household Member

Client

Head of Household

Relationship to Head of Household:

Date Entered (mm/dd/yyyy)

Date Removed (mm/dd/yyyy)

Step 7 – Repeat for each household member THEN Close the window



Client Consent – ROI

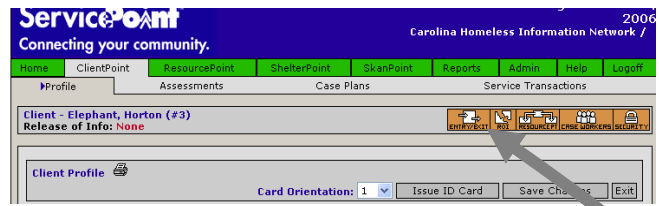
Make sure you have the client’s consent to be put into the system before you start entering their information in the HMIS.

If a client circles NO to #1 on the consent DO NOT ENTER THEM INTO THE HMIS.

If a client circles NO to #2 on the consent CONTACT CHIN

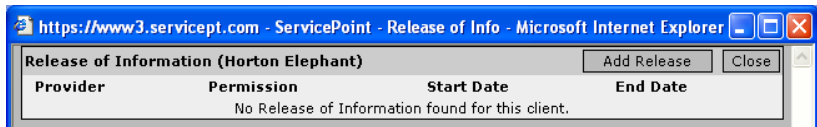
If a client circles NO to #3 on the consent select NO in Step 4 below.

Complete the client consent (ROI) step after you have entered all household members.



Step 1 – TO GET TO THIS SCREEN - From the top of the main client’s Profile page, click on the orange ROI button.

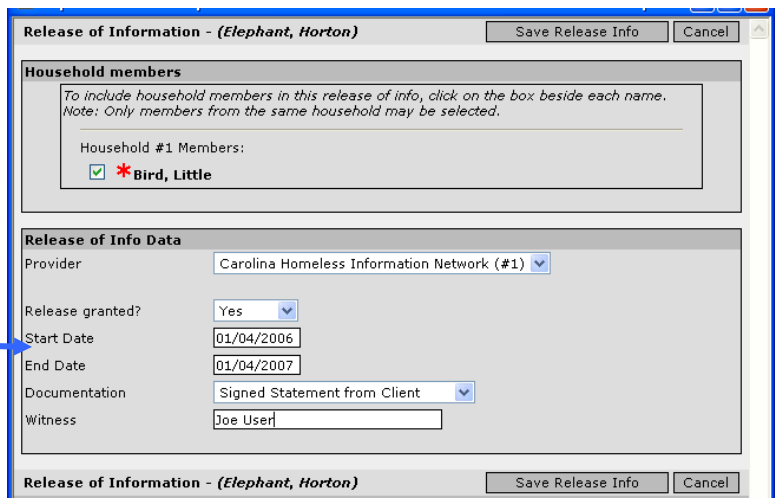
Step 2 – Click on Add Release



Step 3 – Check the box next to the household member’s names IF they have the same release parameters. If they have different release parameters, do not click the boxed next to their name and remember to go into their files to set up their consents later.

Step 4 – Check whether or not the release has been granted, enter the start AND end dates, enter the documentation and the witness

BACK DATE NOTE – Make sure the Start Date matches the date of the PHC event.

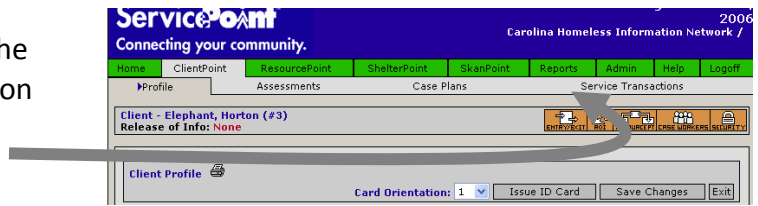


Step 5 – Click Save Release Info and Close the window

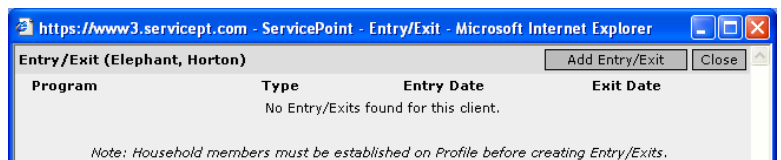


Recording participation in the PHC event – ENTRY / EXIT WORKSHEETS

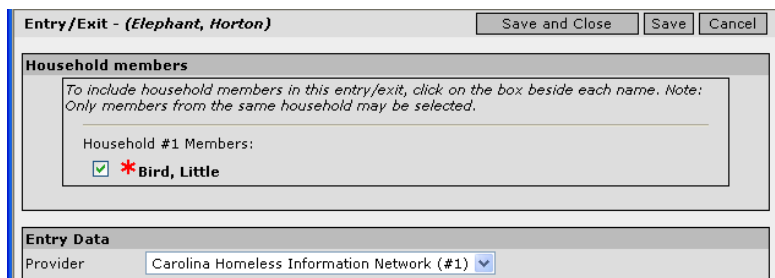
Step 1 – TO GET TO THIS SCREEN - From the top of the main client’s Profile page, click on the orange Entry/Exit button.



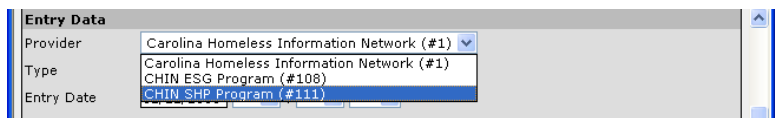
Step 2 – Click on Add Entry/ Exit



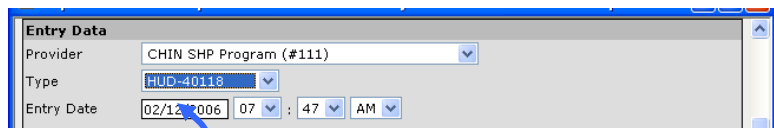
Step 3 – Check the box next to the name of additional household members, if any, who are being enrolled in the same program.



Step 4 – Select the type of program (Standard for Project Homeless Connect) and enter the date of the PHC event



BACK DATE NOTE – Make sure the Entry Date matches the date of the PHC event.





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Step 5 – Enter the answers to the questions.

Under Resources Obtained, answer Yes if the client obtained the resource, answer No if it is an unmet need, skip the question if it isn't a need of the client.

Under Housing, select the type of housing/shelter the client received.

Step 6 – Click Save and Close the window

Remember that you will need to fill out the Exit data to complete the process and answer the survey questions.

Photo release on file?	Yes	H G
Gender	Male	H G
Date of Birth	01/01/1920 (mm/dd/yyyy)	H G
Ethnicity	Other (Non-Hispanic/Latino)	H G
Primary Race	White (HUD)	H G
Secondary Race	- Select -	H G
Marital Status	Married	H G
Children in Household		H G
U.S. Military Veteran?	No (HUD)	H G
Have you been to a Project Homeless Connect before	No	H G
If yes, when and where		H G
Income source(s)	SSI	H G
Receiving Veterans Services?	No	H G
Receiving SSI?	Yes	H G
Receiving SSDI?	- Select -	H G
Receiving Food Stamps?	No	H G
Pregnant?	- Select -	H G
If Yes, Projected Birth Date		(mm/dd/yyyy) H G
Receiving Prenatal MedicalCare?	- Select -	H G
Eligible For WIC?	- Select -	H G
Receiving WIC?	- Select -	H G
Use Alcohol or Drugs?	No	H G
Type of Living Situation	Place not meant for habitation (HUD)	H G
Resources Obtained (Yes=obtained No=unmet need)		
MEDICAL		
Primary Care	No	H G
Triage	- Select -	H G
TB	Yes	H G
HIV test	- Select -	H G
Vision	- Select -	H G
Dental	- Select -	H G
Orthopedic	- Select -	H G
BEHAVIORAL HEALTH		
Substance Abuse	No	H G
Mental Health	- Select -	H G
Direct Counseling	- Select -	H G
BENEFITS		
Federal	- Select -	H G
Federal-SSI	- Select -	H G
Federal-SSDI	- Select -	H G
Federal-VA Benefits	- Select -	H G
VA HURP	- Select -	H G
VA VWHIP	Yes	H G
VA OEF/OIF/Suicide Prevention	- Select -	H G
State	- Select -	H G
State-TANF	- Select -	H G
State-Medicaid/Medicare	- Select -	H G
State-Food Stamps	- Select -	H G
State-Child Support	- Select -	H G



Exiting your client from a program

Step 1 Pull up the client's file by searching for it through ClientPoint

Step 2 TO GET TO THIS SCREEN - Click on the orange Entry/Exit button from the top of the client's file.

Step 3 Click on the pencil under Exit Date

Step 4 Enter the exit data

Step 5 Click Save and Close

BACK DATE NOTE – Make sure the Exit Date matches the date of the PHC event

Entry/Exit (Mouse, Mickey) Add Entry/Exit Close

Program	Type	Entry Date	Exit Date
*CHIN-Project Homeless Connect	Standard Entry	09/13/2007	

Note: Household members must be established on Profile before creating Entry/Exits.

EXIT Data

Exit Date: 09/13/2007 02 : 20 PM

Reason for Leaving: PROJECT HOMELESS CONNECT

If other, specify:

Destination: PROJECT HOMELESS CONNECT

If other, specify:

Tenure: -Select-

Subsidy: -Select-

Notes:

No Household members are included in this Entry/Exit.

Did you get what you came for? Yes **H G**

If no, why not? **H**

What one thing did you like best? Location **H G**

What would you change about today? **H**

Did combining PHC and VA Stand Down work well? - Select - **H G**

Please explain: **H G**

Is client ALSO enrolling in an agency's program? Yes **H G**

PHC FOLLOW-UP DATE (1): 09/15/2007 (mm/dd/yyyy) **H G**

PHC FOLLOW UP DETAILS (1): Client should enter ABC Agency's program by this date **H**

PHC FOLLOW UP DATE (2): (mm/dd/yyyy) **H G**

PHC FOLLOW UP DETAILS (2): **H**