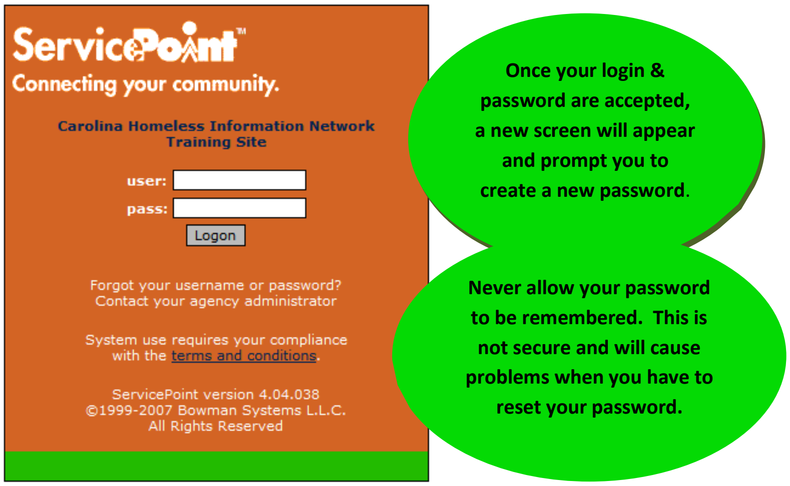
CHIN Emergency Assistance Network
Training Manual
Contents

Logging In

1. Log onto https://chin.servicept.com
2. Enter user name and one-time password.



3. Upon entering your one-time password, you'll be asked to create a new one.
4. The first time you enter your new password you will see the License Agreement. Review it and click **Accept**.
5. You are now at the ServicePoint home page.

Password Tips

Your password must:

1. Have at least 8 characters.
2. Have at least 2 numbers.
3. Have at least 1 capital letter.
4. Not be your name, your agency's name, or a common work spelled forward or backwards.

Password Expiration

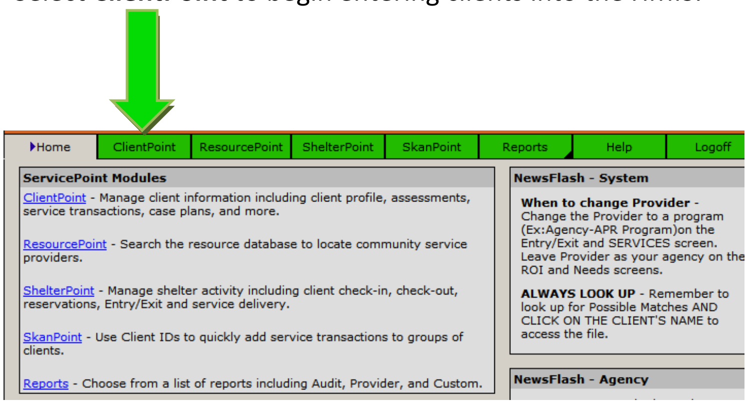
1. This screen means that your password has expired.
2. Create a new one and enter it in *both* fields.

ServicePoint will automatically ask you to change your password every 45 days. You cannot switch between 2 passwords, but you can cycle through 3. ServicePoint will lock you out of the system if you try more than 3 incorrect combinations. If you're locked out of the system, contact CHIN to have your password reset.

ClientPoint: Searching for/Adding a client

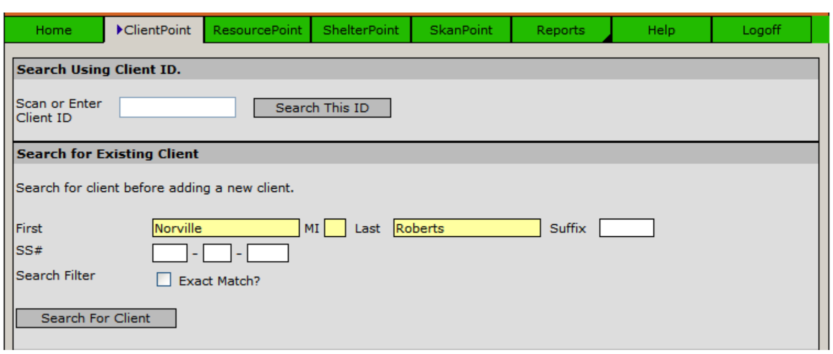
Here you will begin using the HMIS to collect client level data. If a client's file is already in ServicePoint, you can find it by either entering his/her client ID and clicking **Search This ID**, or by entering his/her name and clicking **Search For Client**. To get here, click on the ClientPoint tab.

1. Select **ClientPoint** to begin entering clients into the HMIS.

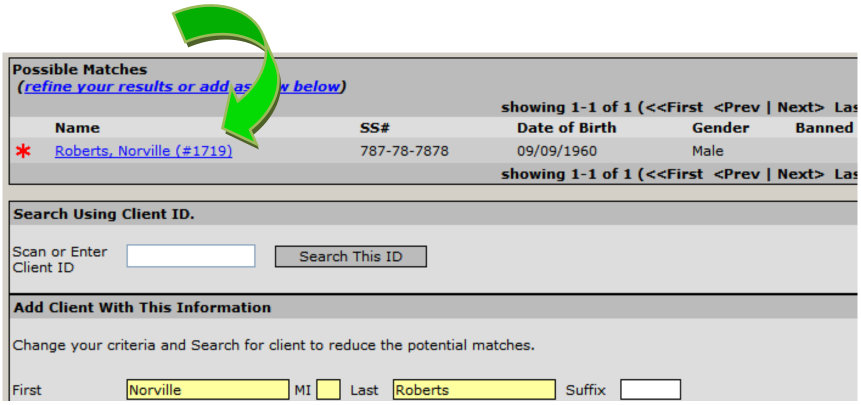


2. Type in the client's name, being careful to spell the names correctly. If you're entering a family into ServicePoint, enter the Head of Household's information first.

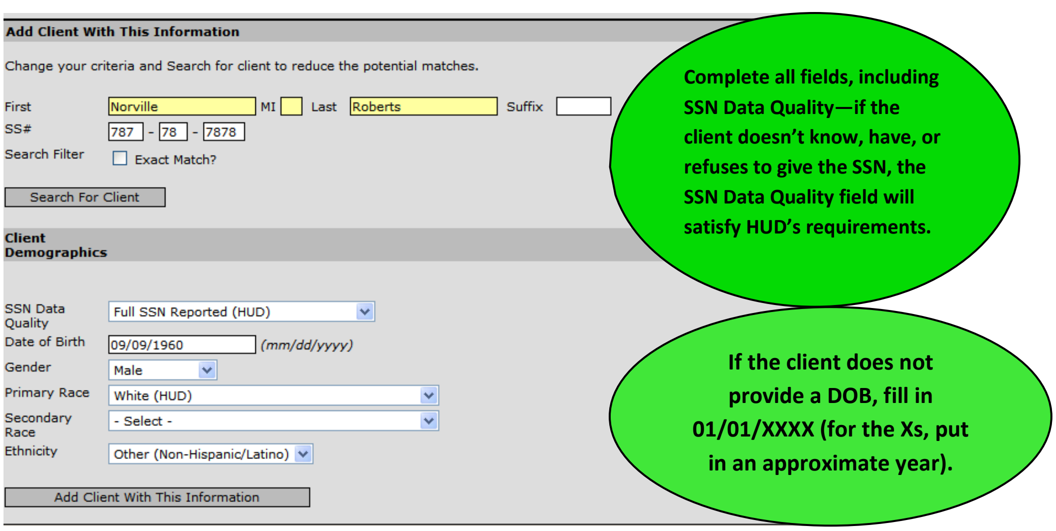
3. Click **Search for Client.**



4. Be sure to look at the top of the screen for Possible Matches; if your client is already in the system, click on their name from the list. Clicking on the client's name will take you directly to the client's profile screen.



5. If the client is *not* in the system, continue entering his/her demographic information, and click **Add Client With This Information.**



*The following box will appear: "About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?" Click **OK**. This is reminding you to search for clients first so that duplicate files aren't entered.*

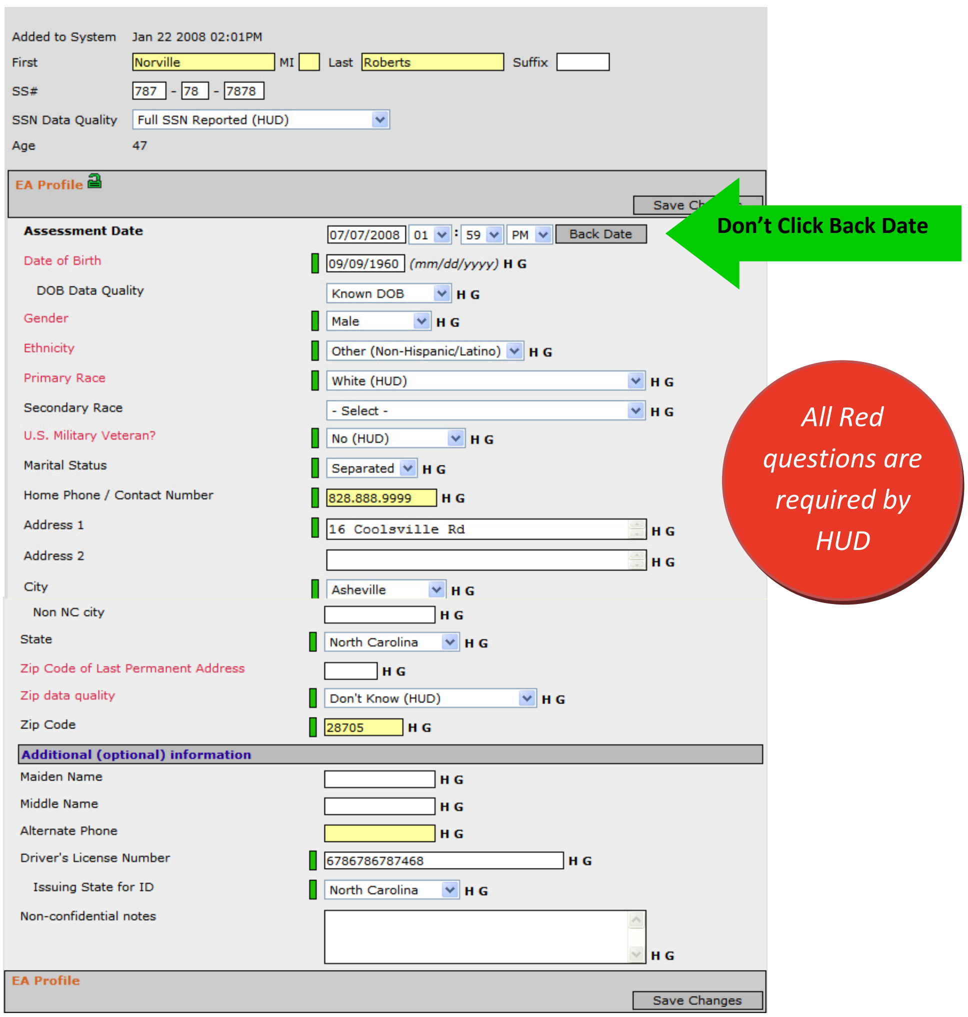
Profile

You can reach the Profile screen in the following ways: 1) When you click on the client's name from the Add/Find screen, 2) when you click on Add Client with This Information, *or* 3) when you click on the Profile tab from 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 any other 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.

1. You will now be on the Client Profile Page. Continue adding information about the client, being sure to answer ALL RED HUD-REQUIRED QUESTIONS; click **Save Changes.**

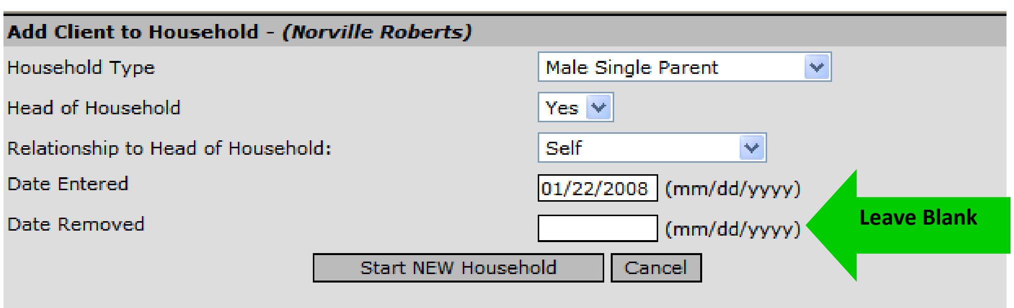


Household Information

Create households when a client is living with or sharing custody of their dependent(s) or a couple without children. Do not create a household for a single individual. A household must contain at least one adult and one child or 2 adults; unless a juvenile is a parent, in which case there would be 2 minors in the household.

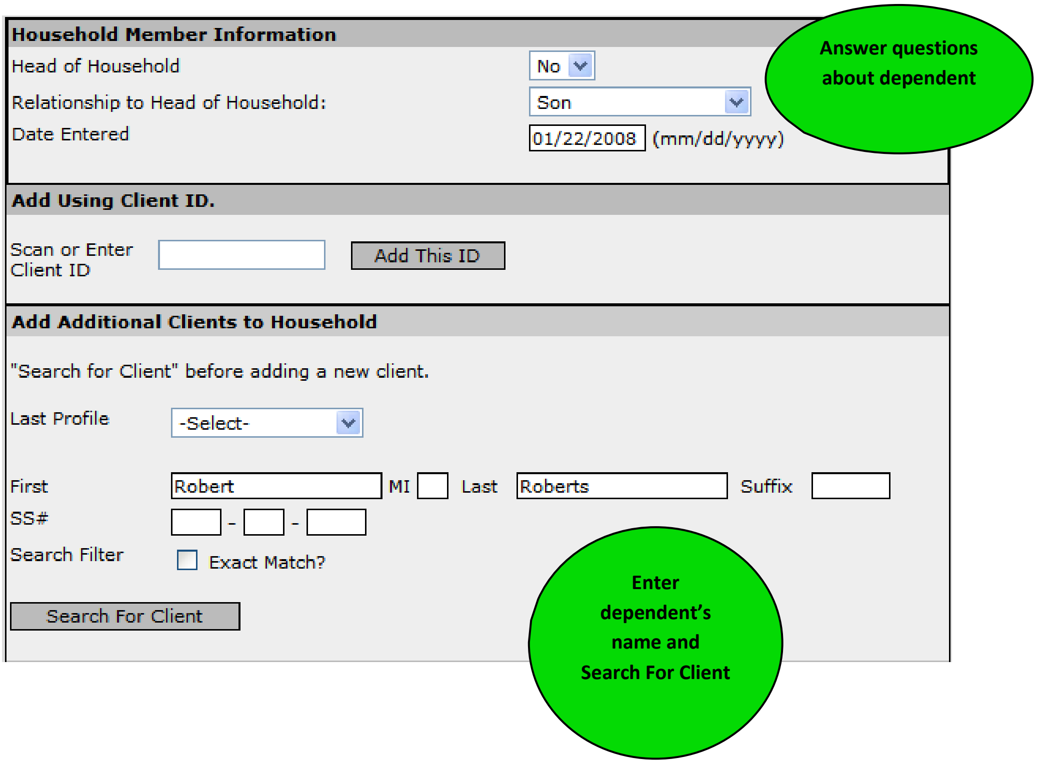
1. To attach household members to the client's file, click the blue **Household Information** link, and then click **Start New Household**.

2. Complete the information for the head of household, and again, click **Start New Household.**

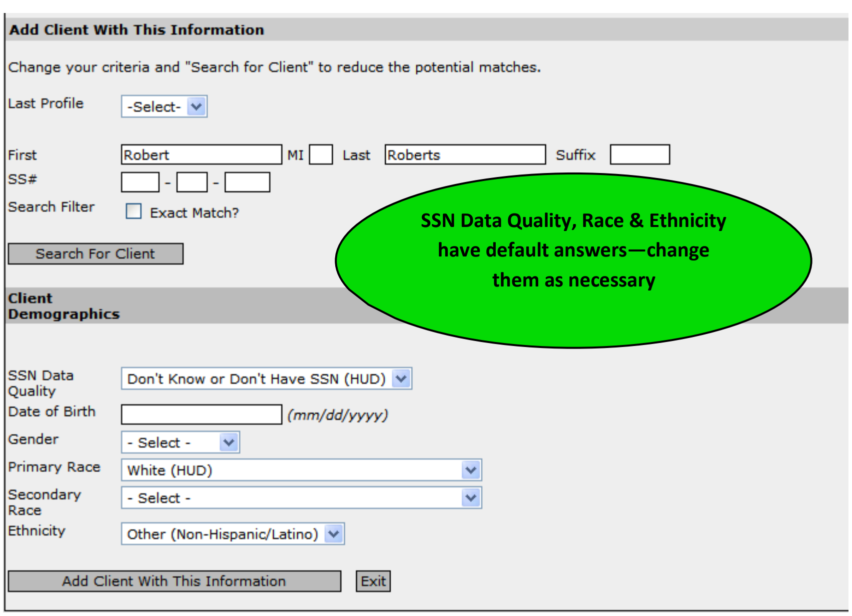


*Data Entry Tip: Don't complete **Date Removed** field. Always leave it blank.*

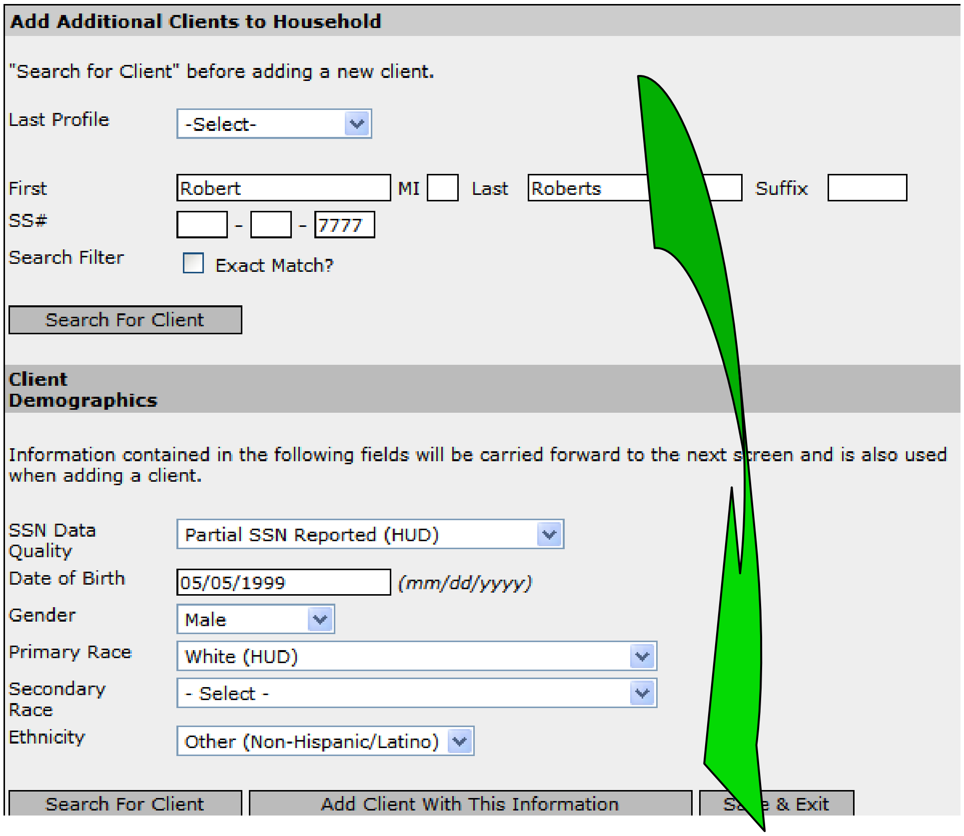
3. Answer questions about the next household member and then enter client's name and click **Search for Client.**



4. If your client is not already in the system, continue entering his/her information. Notice that SSN Data Quality, Primary Race, and Ethnicity are already filled in. If these need to be changed, do so.



5. Once all fields are complete, click **Add Client With This Information**.



6. As entered, household members will appear at the top of the screen.

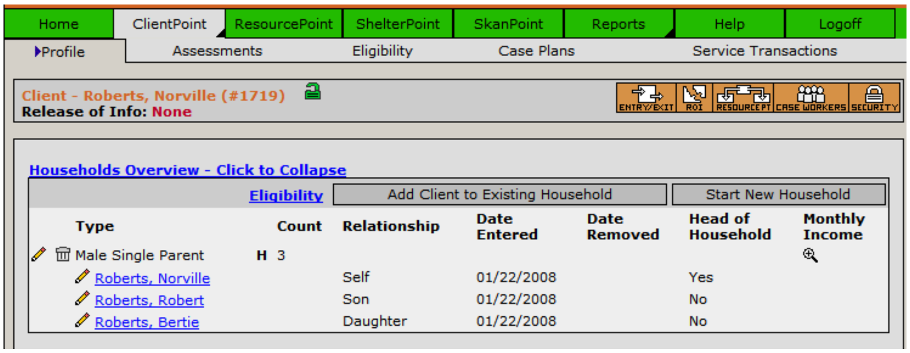
Overview - Type: Male Single Parent,
Current Members: 3 Removed Members: 0

Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
Roberts, Norville (#1719)	Self	01/22/2008		Yes
Roberts, Robert (#1721)	Son	01/22/2008		No
Roberts, Bertie (#1722)	Daughter	01/22/2008		No

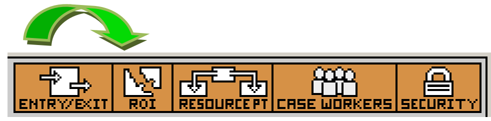
7. Repeat above steps until all household members are entered. When all clients are entered into the household, click **Exit.**

8. The Profile screen will refresh to show the Households Overview.

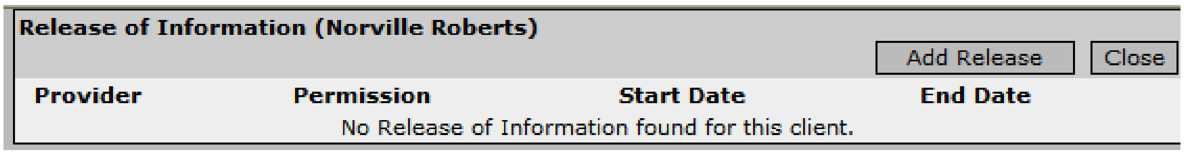


Release of Information

1. Click on the orange ROI button to enter the consent information for the household—a new screen will appear.



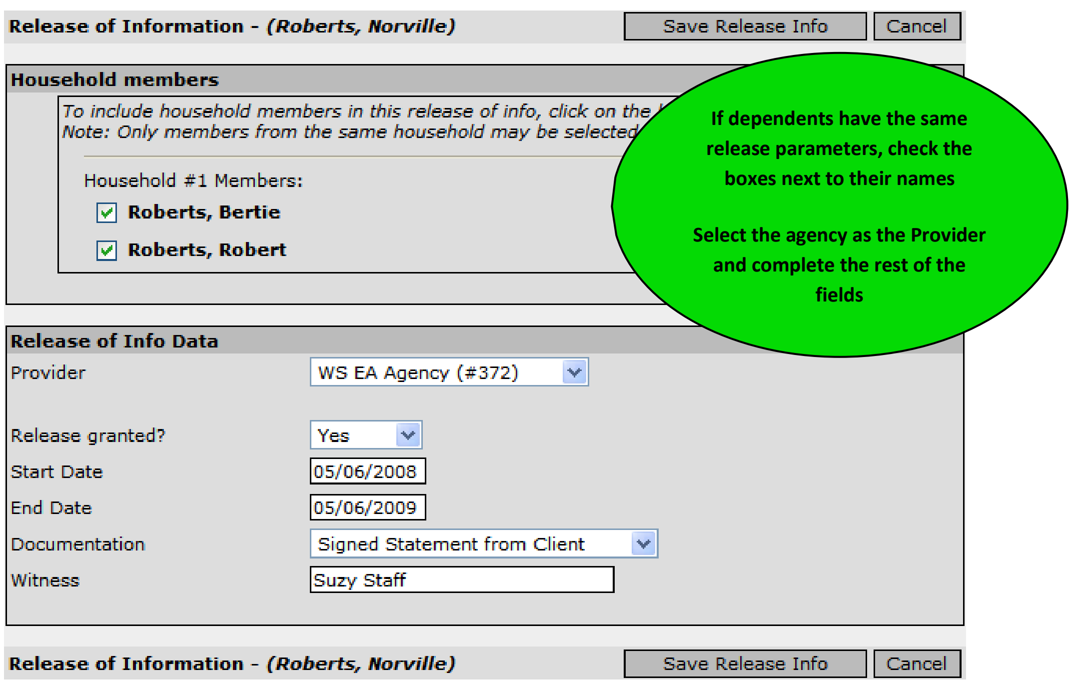
2. Click **Add Release.**



3. If the dependents' release info is the same as the Head of Household's, check the boxes next to their names.

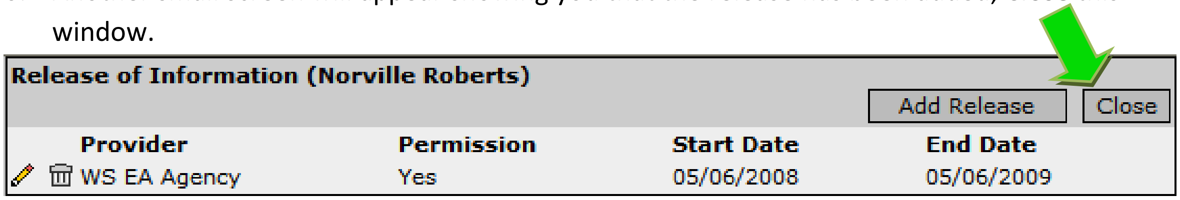
   For questions on release of information parameters, see Client Consent Explanation on next page.

4. Complete the Release of Information.

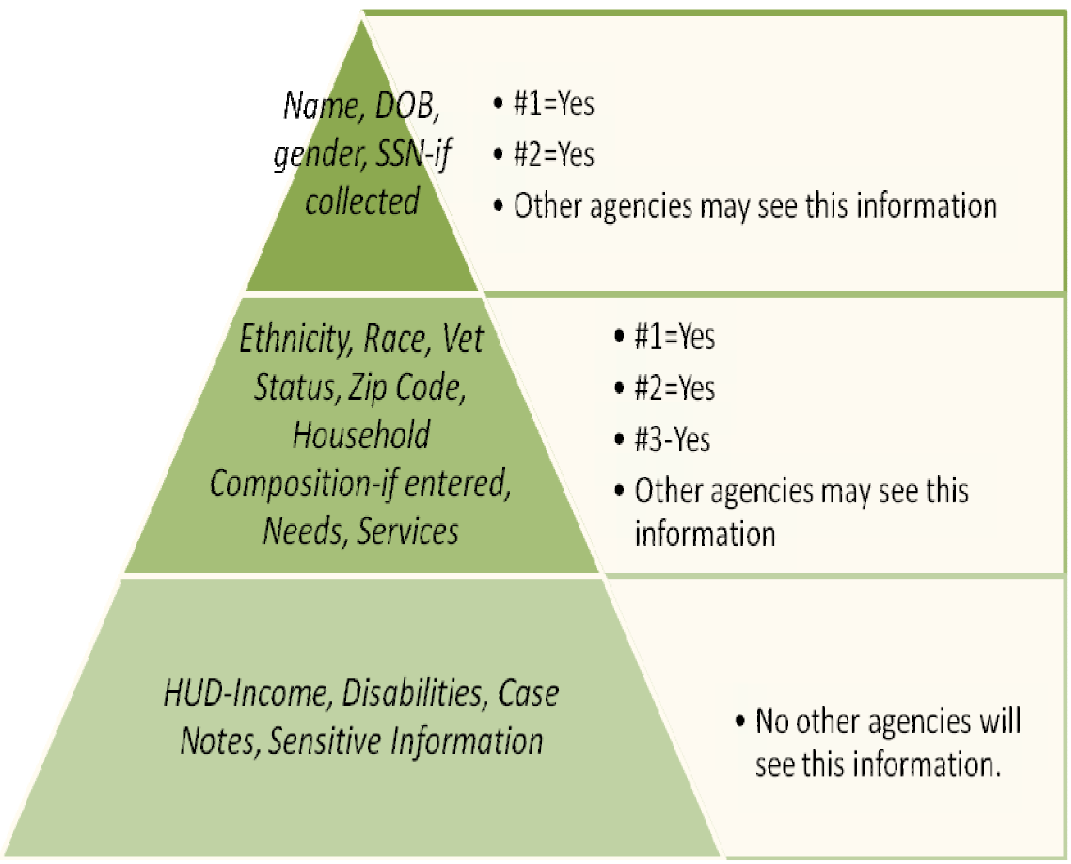


5. Click **Save Release Info**.

6. Another small screen will appear showing you that the release has been added; **Close** this window.

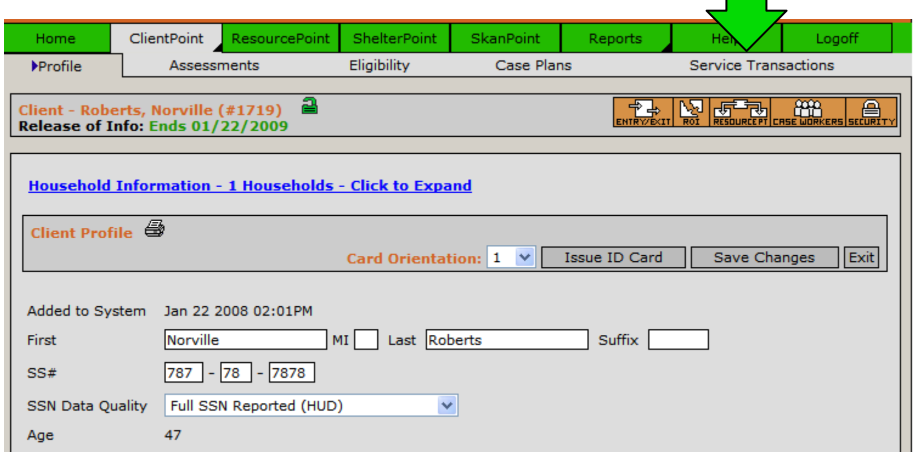


CHIN HMIS Client Consent



Recording Services, Needs and Referrals

You can record single needs and services, multiple services, unmet needs, and referrals. Select **Service Transactions** to reach this screen.

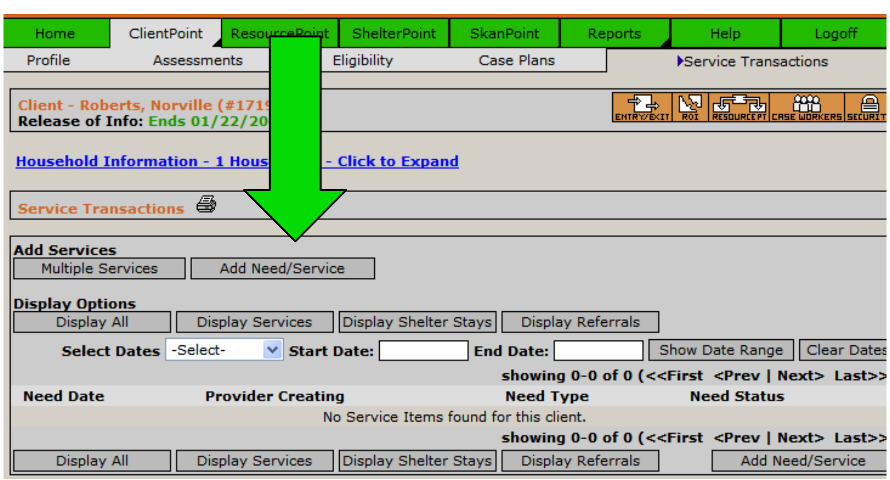


Do Not Use the *Recording Multiple Services* Button

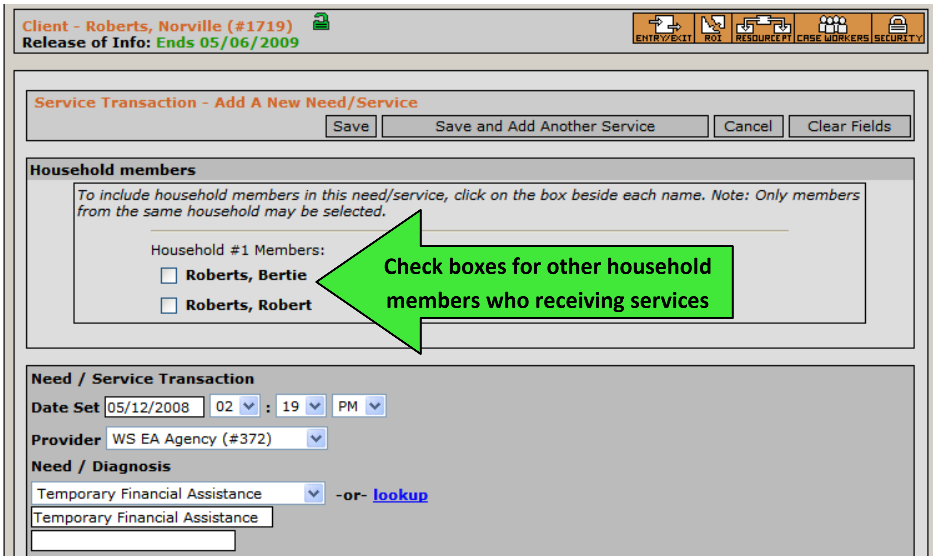
Recording a Single Service

Record a single need and/or service in order to make referrals, track referrals and unmet needs, and to be able to add non-confidential notes about the need. Also use this function to record **Unmet Needs**. For Unmet Needs, only complete the fields in the **Needs** section (Leave **Services** blank) and click **Save**. Be sure to complete **Status and Outcome** for all services, needs, and referrals.

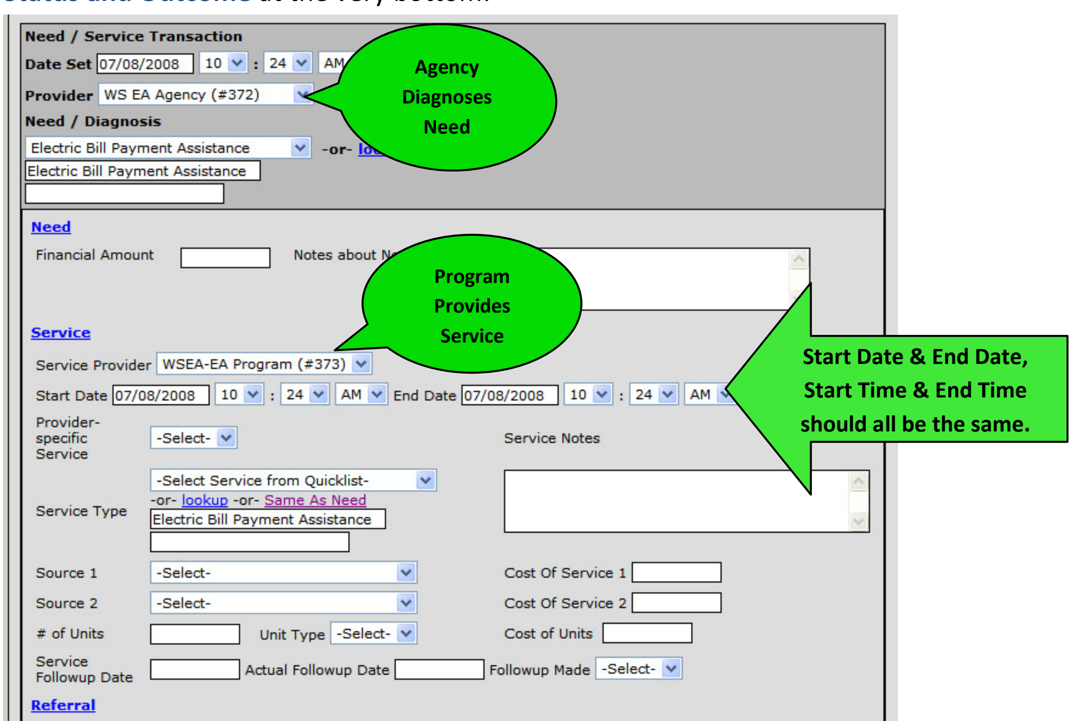
1. Select **Add Need/Service**.



2. Check boxes next to household members' names who are receiving the same services.



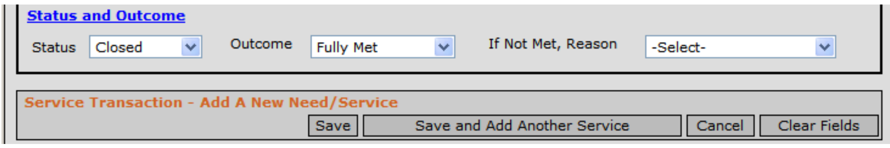
3. The screen is split between **Need** information and **Service** information. Remembering that the *Agency diagnoses the Need* and the *Program provides the Service*, complete the fields, including **Status and Outcome** at the very bottom:



- **Date Set** should be the day the need was diagnosed.
- **Provider** is the Agency (Agency Diagnoses the Need).
- For **Need/Diagnosis**, select the client's need from the drop-down menu.
- Optional: **Financial Amount** is for your agency's tracking needs.
- Optional: **Notes about Need** allows you to write non-confidential notes about your client's needs. Depending on the client's level of consent, these notes may be viewed by other agencies.
- **Service Provider** is the program that is providing the service.
- Select the **Start Date** to record when the client began receiving services.
- **End Date** should be the same as the start date. You will also need to fill in the time—it should also reflect the same time as the start date.
- Optional: **Provider Specific Service** is if your agency provides a special service that is not in the AIRS taxonomy.
- Select **Service Type** from the drop down menu, or click **lookup** to search for a service in the AIRS taxonomy. You can click **Same As Need** to automatically fill in the same service as the need that was diagnosed.
- Optional: **Service Notes** allows you to write non-confidential notes about the service.
- Optional: **Source** and **Cost of Service** can be used to track grant sources. It is not required for the APR, but can be used in reports to track cost of providing services.
- Optional: **# of Units** and **Unit Type** can be used to describe what was provided. For example, you could record that 5 bus passes (# of Units) were in a transportation book (Unit Type).
- Optional: **Cost of Unit** can be used to record the cost of unit. For example, the bus pass cost $.50.
- Optional: Record a date to follow up with the client in **Service Followup Date.**
- Optional: Record the **Actual Followup Date**.
- Optional: Select whether a **Followup** was **Made**.

4. When all necessary fields are complete, scroll down to **Status and Outcome**.

Status and Outcome



1. **Status** records whether needs were met, not met, or referred. If your agency and/or program wants to run a Needs Report, Status must be selected.
    - Identified = Need Referred to another agency
    - In Progress = Ongoing Service your agency is providing
    - Closed = Your agency met the need

2. **Outcome**
    - Service Pending
    - Fully Met
    - Partially Met
    - Not Met

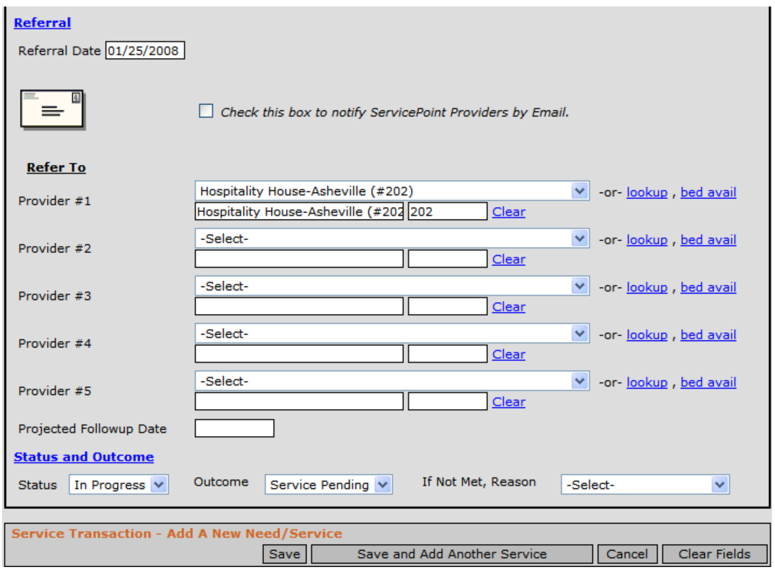
3. Optional: **If Not Met, Reason**
    - All Services Full
    - Client Not Eligible
    - Client Refused Service
    - Service Does Not Exist
    - Service Not Accessible
    - Client was Denied Services

4. Click **Save.**

Recording a Referral

Record Referrals from the **Add Need/Service** page. To make a referral, record the **Needs**, but leave the **Service** information blank, unless your program will only provide partial service, and the rest of the service will be referred to another agency. For example, a client is in need of financial assistance in the amount of $400. Your program will provide $200, but you are referring the client to another agency for the remainder of the funds. In this instance, complete the **Need**, **Service** & **Referral** Information.

5. Select **Referral Date**.



6. Do not use *Check this box to notify ServicePoint Providers by Email*.

7. Select referring agency in **Provider** boxes.

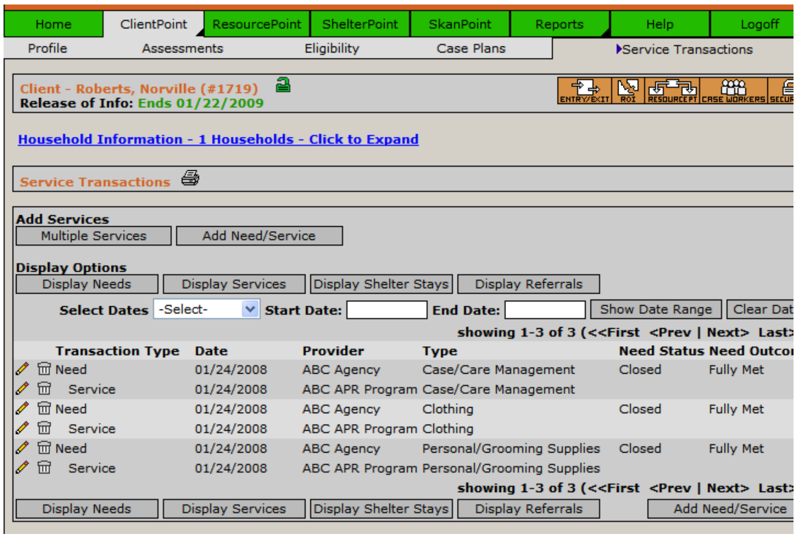
8. Optional: Enter a **Projected Followup Date.**

9. Record **Status and Outcome** (see p. 18 for more instructions).

Viewing Services Provided

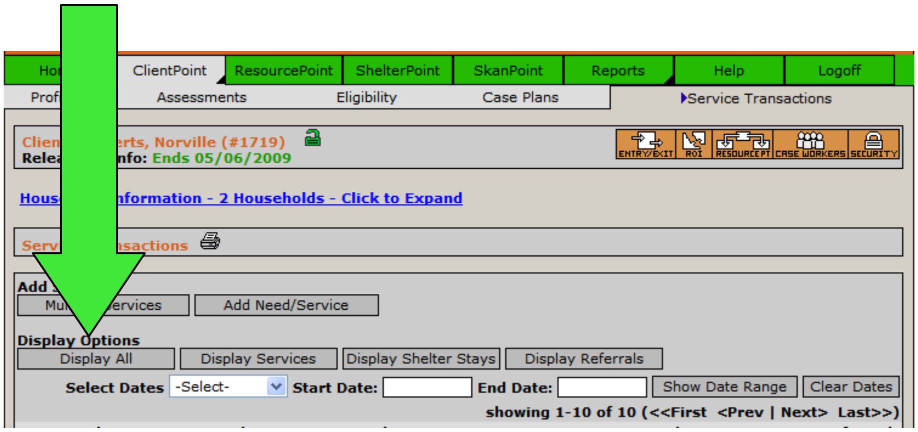
You can view Needs Diagnosed, Services Provided, Unmet Needs, Referrals, and Shelter Stays from the **Service Transactions** page. Select one of the following options: **Display All**, **Display Needs**, **Display Services**, **Display Shelter Stays**, or **Display Referrals.**

Display All View:



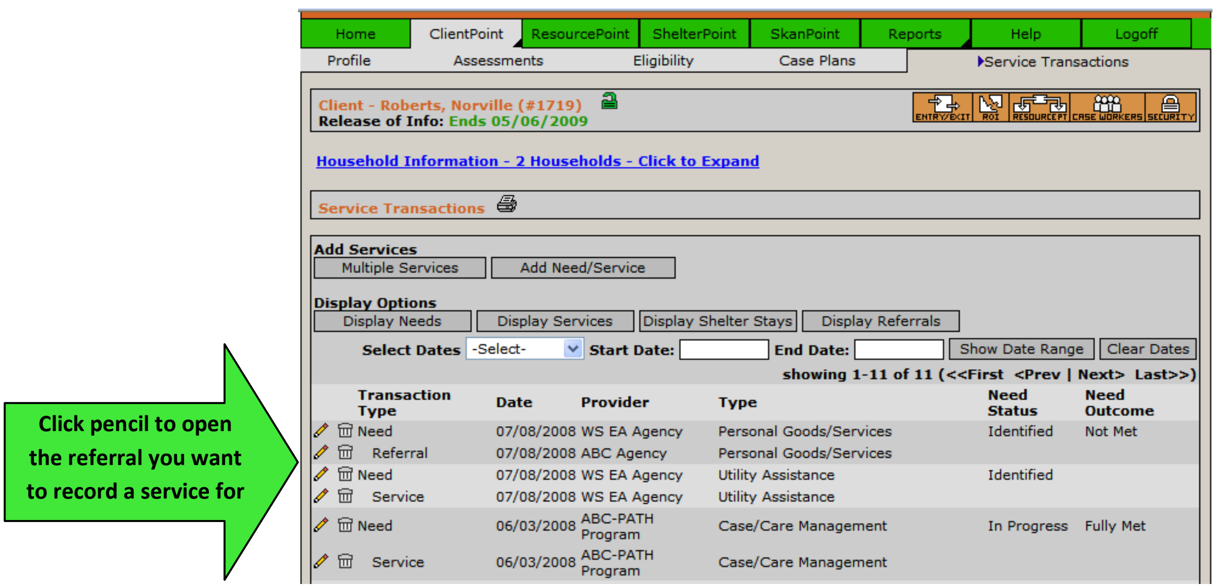
Recording Services Provided to Meet a Referred Need

1. Select **Display All**.

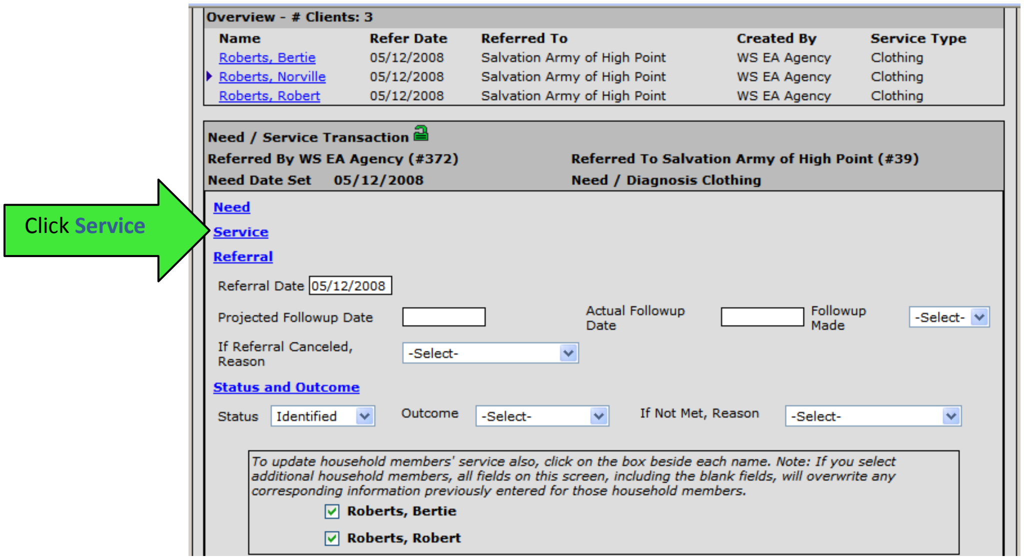


2. All needs, services, and referrals will appear in a separate screen.

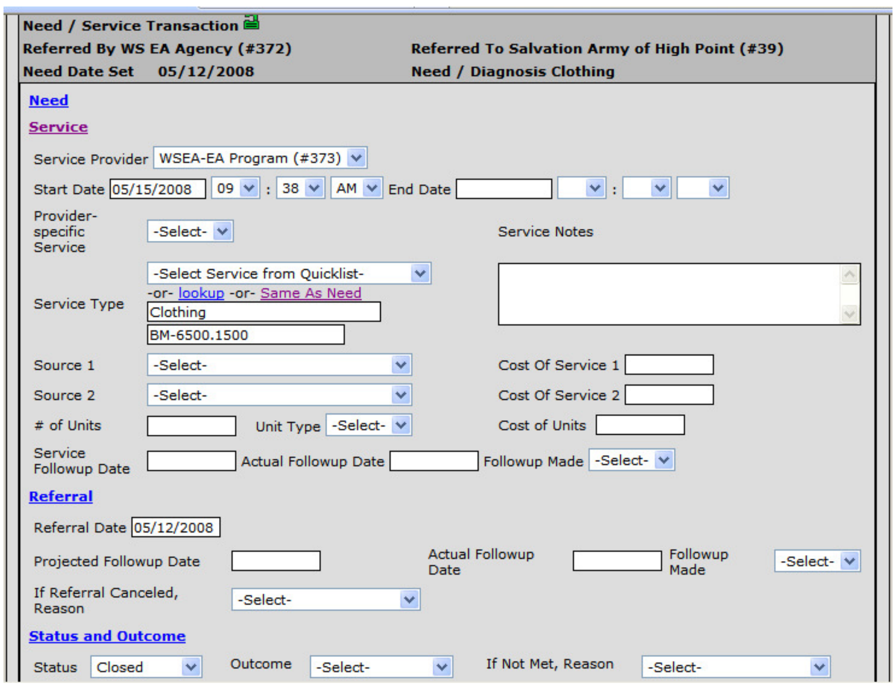
3. Click on the pencil next to the referral you would like to record a service for.



4. The original referral information will appear in a new screen.



5. Click **Service**; the service screen will open in the window.



6. Complete the Service Transaction information, including **Start Date**, **End Date**, and **Service Type.**

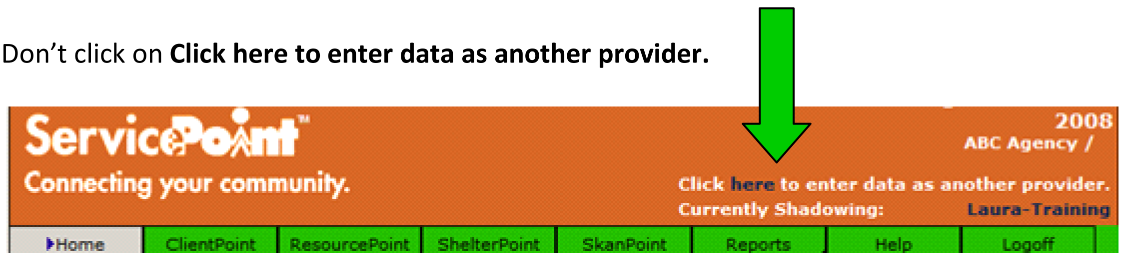
7. Complete **Status and Outcome** (see p. 18 for more instructions).

8. Click **Save.** The Need is now recorded as met.

9. Click **Display All** to view.

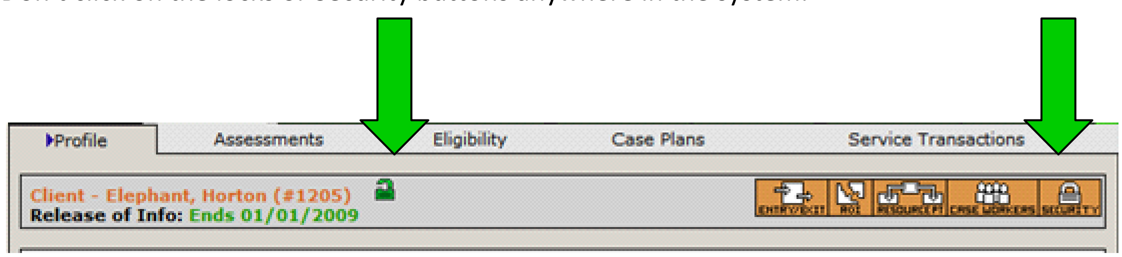
Don't do the following unless you have specific instructions from your Regional Coordinator:

- Don't click on **Click here to enter data as another provider.**



This could change how your data is both handled and seen in the system; it will also affect reports.

- Don't click on the locks or Security buttons anywhere in the system.



These buttons control how data is seen in the system and should only be used by CHIN System Administrators.