

# ***CHIN Emergency Assistance Network Training Manual Contents***

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## 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.

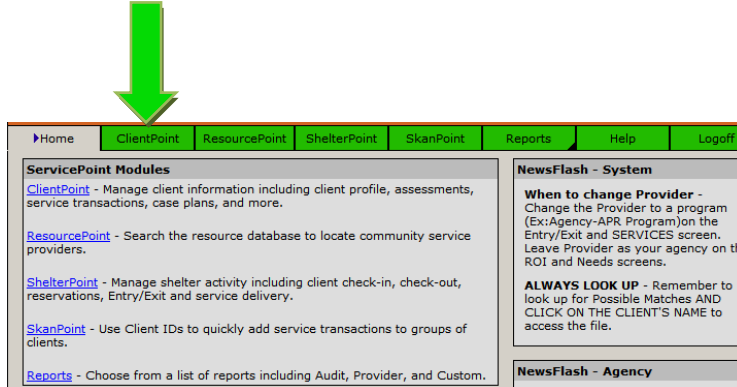
*ServicePoint will automatically ask you to change your password every 45 days. You cannot switch between 2 passwords, but you can cycle through 3. ServicePoint will lock you out of the system if you try more than 3 incorrect combinations. If you're locked out of the system, contact CHIN to have your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

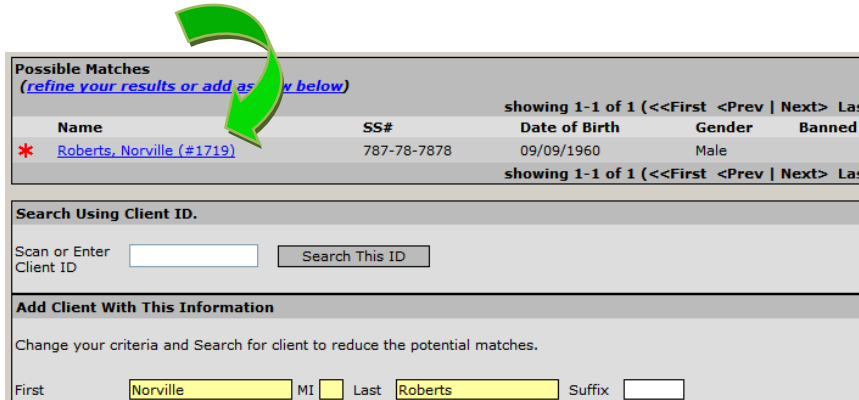


2. Type in the client's name, being careful to spell the names correctly. If you're entering a family into ServicePoint, enter the Head of Household's information first.
3. Click **Search for Client**.

The screenshot shows the 'Search for Existing Client' form. It includes a 'Search Using Client ID' section with a text input field and a 'Search This ID' button. Below that is the 'Search for Existing Client' section, which prompts the user to search for a client before adding a new one. It features input fields for 'First' (containing 'Norville'), 'MI' (with a dropdown arrow), 'Last' (containing 'Roberts'), and 'Suffix'. There is also a 'SS#' field with a dropdown arrow and a 'Search Filter' section with an 'Exact Match?' checkbox. A 'Search For Client' button is located at the bottom of the form.



- 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.



**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
* <a href="#">Roberts, Norville (#1719)</a>	787-78-7878	09/09/1960	Male	

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

**Search Using Client ID.**

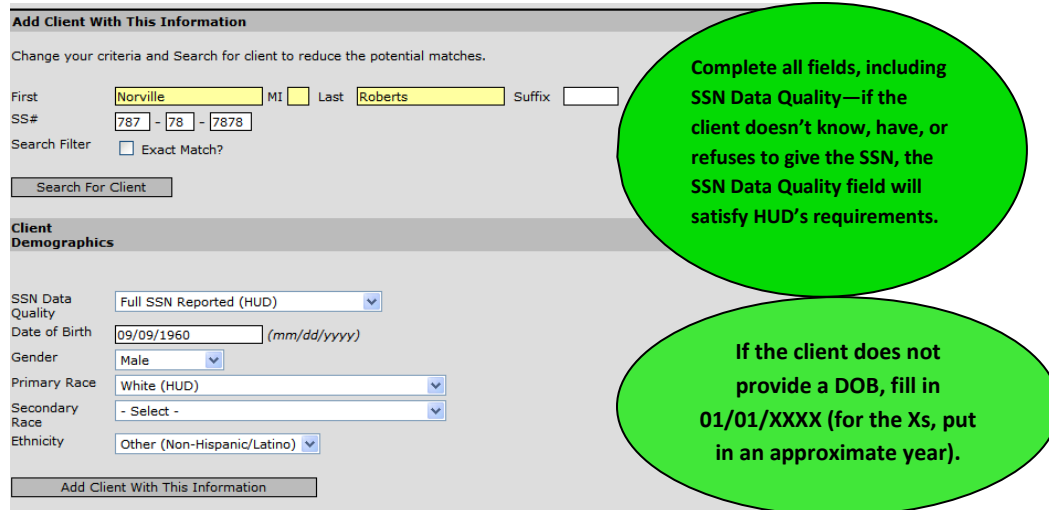
Scan or Enter Client ID

**Add Client With This Information**

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

First  MI  Last  Suffix

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



**Add Client With This Information**

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

First  MI  Last  Suffix

SS#  -  -

Search Filter  Exact Match?

**Client Demographics**

SSN Data Quality

Date of Birth  (mm/dd/yyyy)

Gender

Primary Race

Secondary Race

Ethnicity

**Complete all fields, including SSN Data Quality—if the client doesn't know, have, or refuses to give the SSN, the SSN Data Quality field will satisfy HUD's requirements.**

**If the client does not provide a DOB, fill in 01/01/XXXX (for the Xs, put in an approximate year).**

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**.

Added to System Jan 22 2008 02:01PM

First  MI  Last  Suffix

SS#  -  -

SSN Data Quality

Age 47

**EA Profile** Save Changes

**Assessment Date**   :

**Date of Birth**  (mm/dd/yyyy) H G

DOB Data Quality  H G

**Gender**  H G

**Ethnicity**  H G

**Primary Race**  H G

**Secondary Race**  H G

**U.S. Military Veteran?**  H G

**Marital Status**  H G

**Home Phone / Contact Number**  H G

**Address 1**  H G

**Address 2**  H G

**City**  H G

**Non NC city**  H G

**State**  H G

**Zip Code of Last Permanent Address**  H G

**Zip data quality**  H G

**Zip Code**  H G

**Additional (optional) information**

**Maiden Name**  H G

**Middle Name**  H G

**Alternate Phone**  H G

**Driver's License Number**  H G

**Issuing State for ID**  H G

**Non-confidential notes**  H G

**EA Profile** 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**.

The screenshot shows a client profile for 'Client - Roberts, Norville (719)'. Below the profile information, there is a link for 'Household Information - 1 Households - Click to Expand'. Below this, there is a section for 'Households Overview - Click to Collapse' which contains a table with columns: Type, Count, Relationship, Date Entered, Date Removed, Head of Household, and Monthly Income. Above the table are two buttons: 'Add Client to Existing Household' and 'Start New Household'. Two large green arrows point to the 'Household Information' link and the 'Start New Household' button.

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

The screenshot shows the 'Add Client to Household - (Norville Roberts)' form. The fields are: Household Type (Male Single Parent), Head of Household (Yes), Relationship to Head of Household (Self), Date Entered (01/22/2008), and Date Removed (blank). A green arrow points to the Date Removed field with the text 'Leave Blank'. At the bottom are buttons for 'Start NEW Household' and 'Cancel'.

*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**.



**Household Member Information**

Head of Household    
 Relationship to Head of Household:    
 Date Entered  (mm/dd/yyyy)

**Add Using Client ID.**

Scan or Enter Client ID

**Add Additional Clients to Household**

"Search for Client" before adding a new client.

Last Profile

First  MI  Last  Suffix   
 SS#  -  -   
 Search Filter  Exact Match?

**Answer questions about dependent**

**Enter dependent's name and 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.

**Add Client With This Information**

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

Last Profile

First  MI  Last  Suffix   
 SS#  -  -   
 Search Filter  Exact Match?

**Client Demographics**

SSN Data Quality    
 Date of Birth  (mm/dd/yyyy)  
 Gender    
 Primary Race    
 Secondary Race    
 Ethnicity

**SSN Data Quality, Race & Ethnicity have default answers—change them as necessary**



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

**Add Additional Clients to Household**

"Search for Client" before adding a new client.

Last Profile:

First:  MI  Last:  Suffix:

SS#:  -  -

Search Filter:  Exact Match?

---

**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:

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

<b>Overview - Type: Male Single Parent, Current Members: 3 Removed Members: 0</b>					
					<input type="button" value="Edit Household Type"/>
	<b>Name</b>	<b>Relationship</b>	<b>Date Entered</b>	<b>Date Removed</b>	<b>Head of Household</b>
	▶ 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.

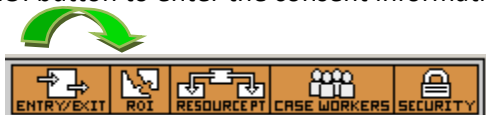
The screenshot shows a web application interface with a navigation menu at the top. The menu items are: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Help, and Logoff. Below the menu, there are tabs for Profile, Assessments, Eligibility, Case Plans, and Service Transactions. The main content area displays the client profile for 'Roberts, Norville (#1719)' with a 'Release of Info: None' status. A toolbar contains icons for Entry/Exit, ROI, Resource, Case Workers, and Security. The 'Households Overview' section is expanded, showing a table of household members.

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
Male Single Parent	H 3					
Roberts, Norville		Self	01/22/2008		Yes	
Roberts, Robert		Son	01/22/2008		No	
Roberts, Bertie		Daughter	01/22/2008		No	



**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**.

Release of Information (Norville Roberts)			
Provider	Permission	Start Date	End Date
No Release of Information found for this client.			

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.



Release of Information - (Roberts, Norville)	
Save Release Info    Cancel	
<b>Household members</b>	
<p><i>To include household members in this release of info, click on the checkboxes next to their names.</i>  <i>Note: Only members from the same household may be selected.</i></p> <p>Household #1 Members:</p> <p><input checked="" type="checkbox"/> Roberts, Bertie</p> <p><input checked="" type="checkbox"/> Roberts, Robert</p>	
<b>Release of Info Data</b>	
Provider	WS EA Agency (#372)
Release granted?	Yes
Start Date	05/06/2008
End Date	05/06/2009
Documentation	Signed Statement from Client
Witness	Suzy Staff
<b>Release of Information - (Roberts, Norville)</b>	
Save Release Info    Cancel	


If dependents have the same release parameters, check the boxes next to their names  
  
 Select the agency as the Provider and complete the rest of the fields

5. Click **Save Release Info**.

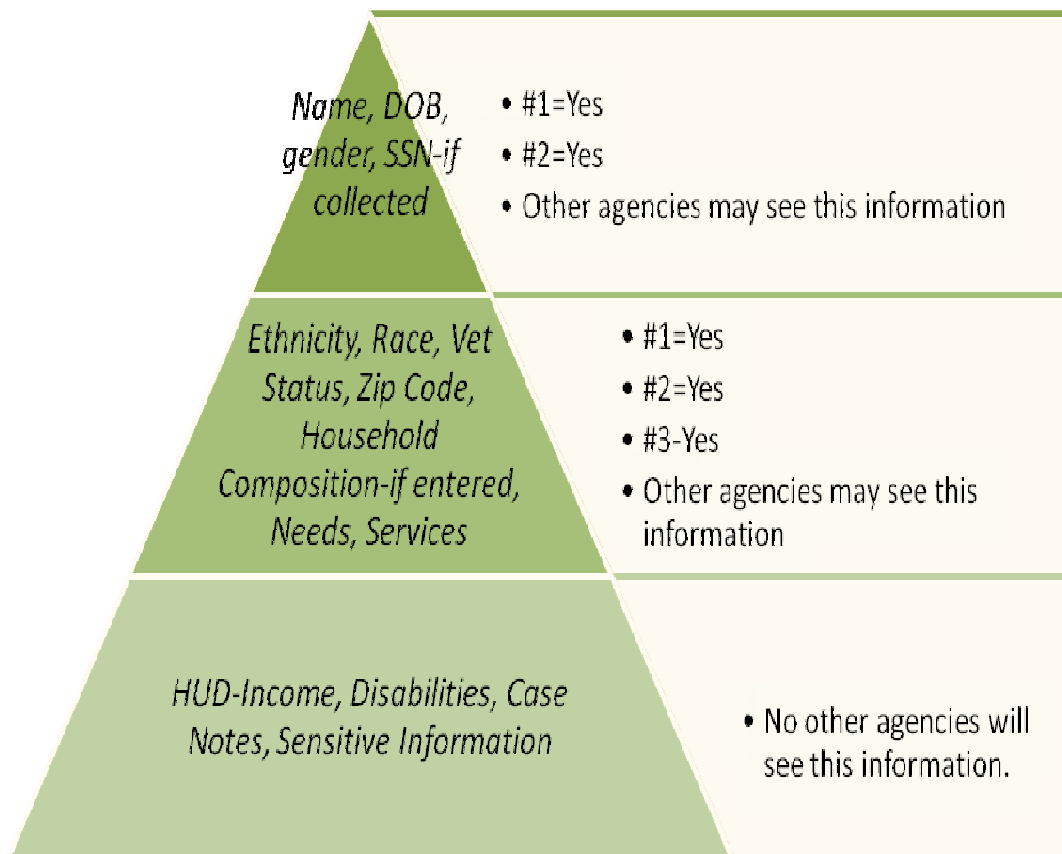


6. Another small screen will appear showing you that the release has been added; **Close** this window.

Release of Information (Norville Roberts)			
Provider	Permission	Start Date	End Date
  WS EA Agency	Yes	05/06/2008	05/06/2009

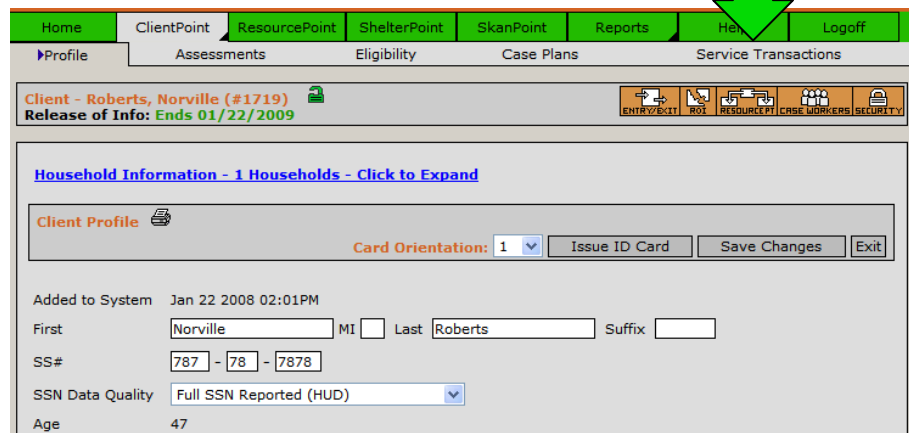


### CHIN HMIS Client Consent



## 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.




Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Help Logoff

Profile Assessments Eligibility Case Plans Service Transactions

Client - Roberts, Norville (#1719)  
Release of Info: Ends 01/22/2009

Household Information - 1 Households - Click to Expand

Client Profile  Card Orientation: 1

Added to System Jan 22 2008 02:01PM

First  MI  Last  Suffix

SS#  -  -

SSN Data Quality

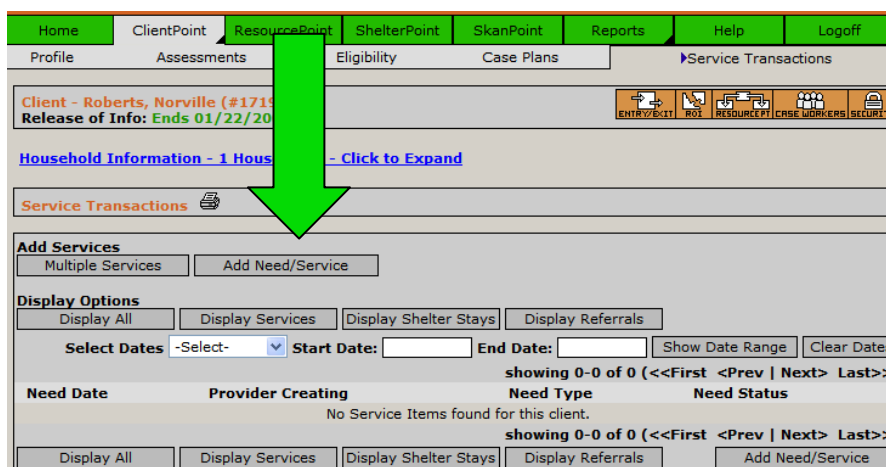
Age 47

### 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**.




Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Help Logoff

Profile Assessments Eligibility Case Plans Service Transactions

Client - Roberts, Norville (#1719)  
Release of Info: Ends 01/22/2009

Household Information - 1 Households - Click to Expand

Service Transactions 

**Add Services**

**Display Options**

Select Dates  Start Date:  End Date:  Show Date Range

showing 0-0 of 0 (<<First <Prev | Next> Last>>)

**Need Date** **Provider Creating** **Need Type** **Need Status**

No Service Items found for this client.

showing 0-0 of 0 (<<First <Prev | Next> Last>>)



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

Client - Roberts, Norville (#1719)

Release of Info: Ends 05/06/2009

**Service Transaction - Add A New Need/Service**

Save Save and Add Another Service Cancel Clear Fields

**Household members**

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

Household #1 Members:

Roberts, Bertie

Roberts, Robert

**Need / Service Transaction**

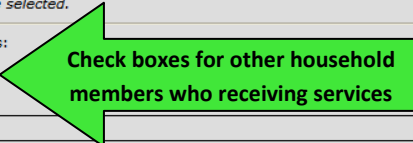
Date Set 05/12/2008 02 : 19 PM

Provider WS EA Agency (#372)

**Need / Diagnosis**

Temporary Financial Assistance -or- lookup

Temporary Financial Assistance



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:

**Need / Service Transaction**

Date Set 07/08/2008 10 : 24 AM

Provider WS EA Agency (#372)

**Need / Diagnosis**

Electric Bill Payment Assistance -or- lookup

Electric Bill Payment Assistance

**Need**

Financial Amount Notes about Need

**Service**

Service Provider WSEA-EA Program (#373)

Start Date 07/08/2008 10 : 24 AM End Date 07/08/2008 10 : 24 AM

Provider-specific Service -Select-

Service Type -Select Service from Quicklist -or- lookup -or- Same As Need

Electric Bill Payment Assistance

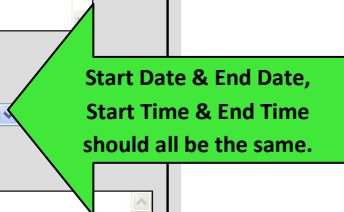
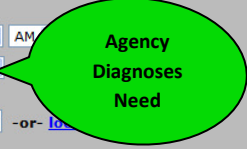
Source 1 -Select- Cost Of Service 1

Source 2 -Select- Cost Of Service 2

# of Units Unit Type -Select- Cost of Units

Service Followup Date Actual Followup Date Followup Made -Select-

**Referral**



- **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

<b>Status and Outcome</b>					
Status	Closed	Outcome	Fully Met	If Not Met, Reason	-Select-
<b>Service Transaction - Add A New Need/Service</b>					
Save		Save and Add Another Service		Cancel	Clear Fields

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**.

**Referral**

Referral Date

Check this box to notify ServicePoint Providers by Email.

**Refer To**

Provider #1  -or- [lookup](#) , [bed avail](#)  
  [Clear](#)

Provider #2  -or- [lookup](#) , [bed avail](#)  
  [Clear](#)

Provider #3  -or- [lookup](#) , [bed avail](#)  
  [Clear](#)

Provider #4  -or- [lookup](#) , [bed avail](#)  
  [Clear](#)

Provider #5  -or- [lookup](#) , [bed avail](#)  
  [Clear](#)

Projected Followup Date

**Status and Outcome**

Status  Outcome  If Not Met, Reason

**Service Transaction - Add A New Need/Service**

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:

Client - Roberts, Norville (#1719)  
Release of Info: Ends 01/22/2009

Household Information - 1 Households - Click to Expand

Service Transactions

Add Services  
Multiple Services Add Need/Service

Display Options  
Display Needs Display Services Display Shelter Stays Display Referrals

Select Dates: -Select- Start Date: End Date: Show Date Range Clear Data

showing 1-3 of 3 (<<First <Prev | Next> Last>

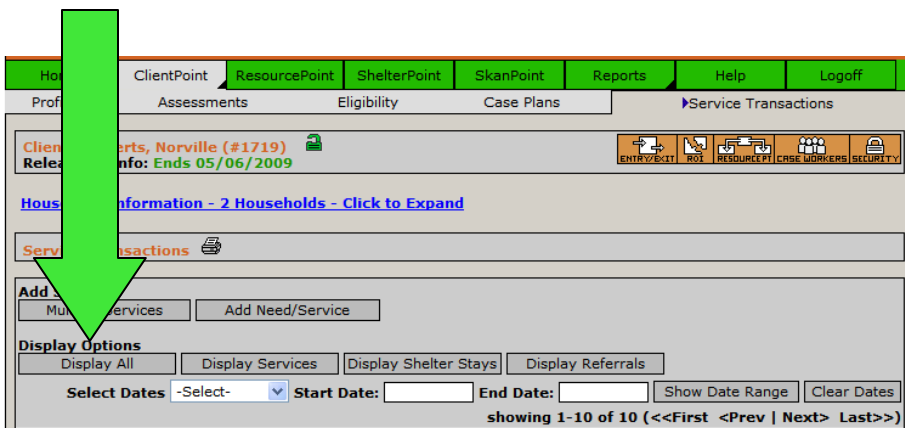
Transaction Type	Date	Provider	Type	Need Status	Need Outcome
Need	01/24/2008	ABC Agency	Case/Care Management	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Case/Care Management		
Need	01/24/2008	ABC Agency	Clothing	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Clothing		
Need	01/24/2008	ABC Agency	Personal/Grooming Supplies	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Personal/Grooming Supplies		

showing 1-3 of 3 (<<First <Prev | Next> Last>

Display Needs Display Services Display Shelter Stays Display Referrals Add Need/Service

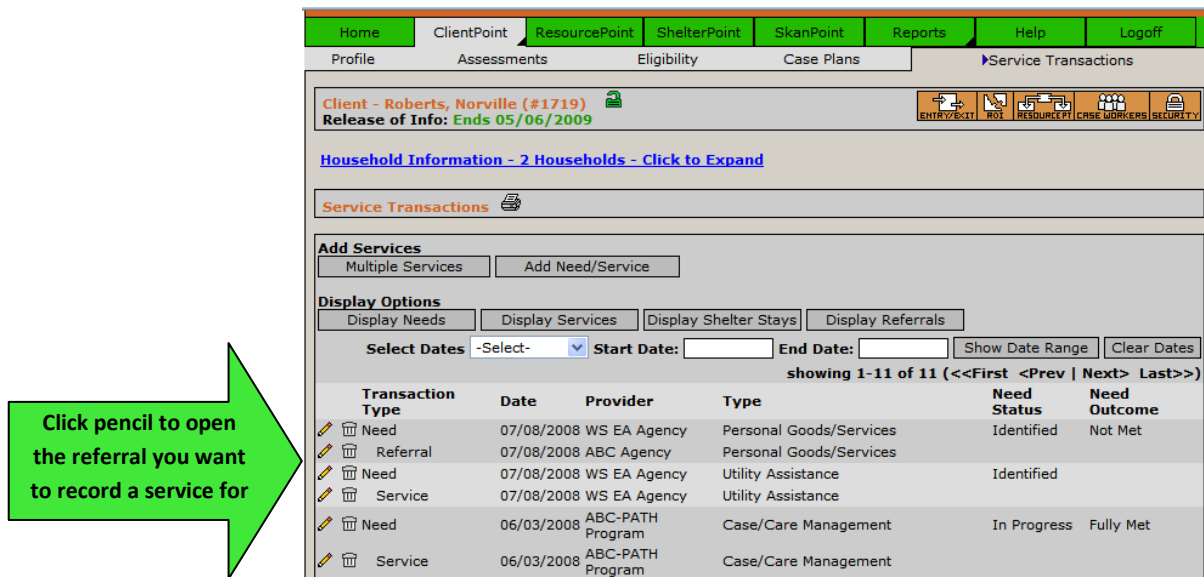
### Recording Services Provided to Meet a Referred Need

1. Select **Display All**.

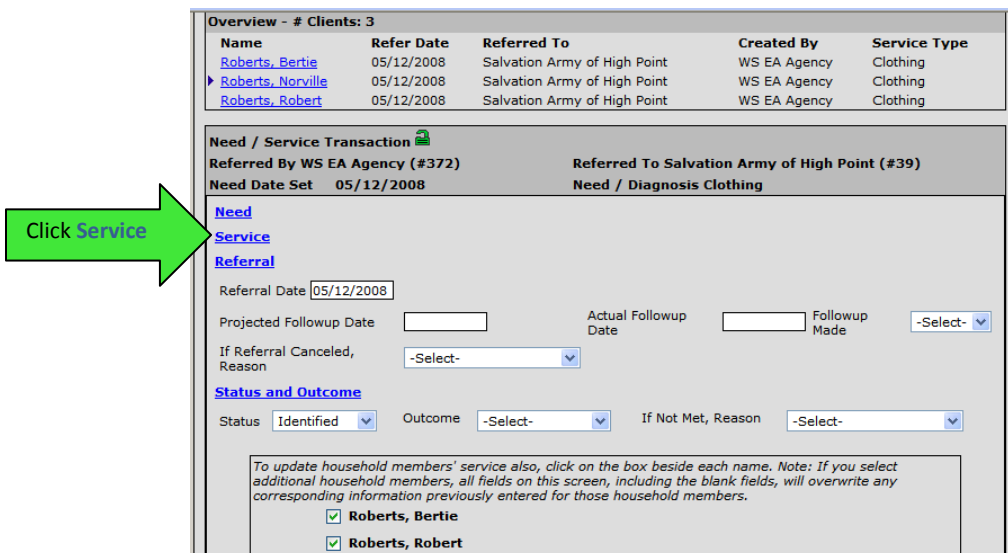


2. All needs, services, and referrals will appear in a separate screen.

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.



**Overview - # Clients: 3**

Name	Refer Date	Referred To	Created By	Service Type
<a href="#">Roberts, Bertie</a>	05/12/2008	Salvation Army of High Point	WS EA Agency	Clothing
<a href="#">Roberts, Norville</a>	05/12/2008	Salvation Army of High Point	WS EA Agency	Clothing
<a href="#">Roberts, Robert</a>	05/12/2008	Salvation Army of High Point	WS EA Agency	Clothing

**Need / Service Transaction**  
 Referred By WS EA Agency (#372)      Referred To Salvation Army of High Point (#39)  
 Need Date Set 05/12/2008      Need / Diagnosis Clothing

[Need](#)  
[Service](#)  
[Referral](#)

Referral Date

Projected Followup Date       Actual Followup Date       Followup Made

If Referral Canceled, Reason

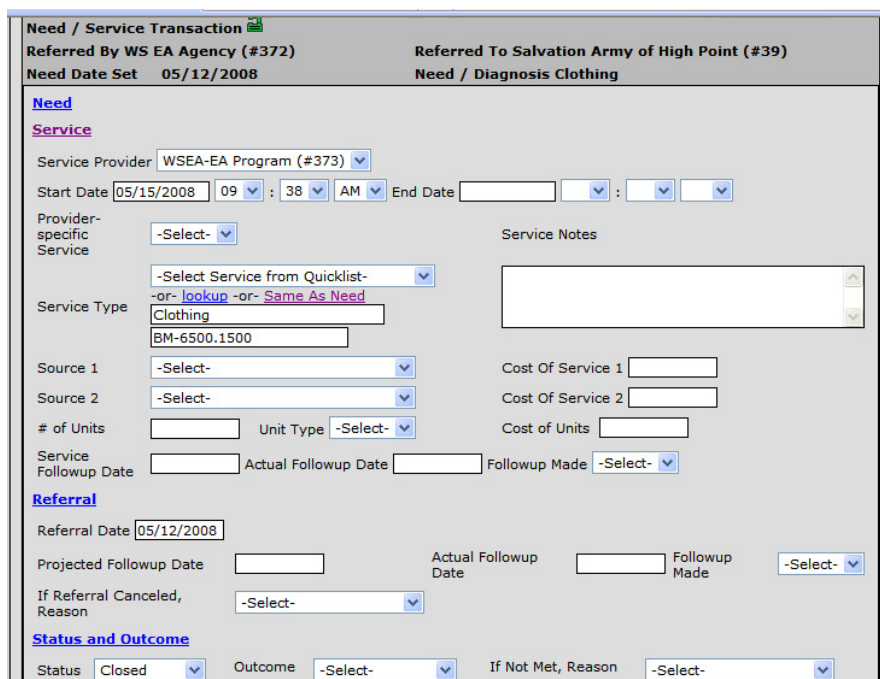
**Status and Outcome**

Status       Outcome       If Not Met, Reason

To update household members' service also, click on the box beside each name. Note: If you select additional household members, all fields on this screen, including the blank fields, will overwrite any corresponding information previously entered for those household members.

Roberts, Bertie  
 Roberts, Robert

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



**Need / Service Transaction**  
 Referred By WS EA Agency (#372)      Referred To Salvation Army of High Point (#39)  
 Need Date Set 05/12/2008      Need / Diagnosis Clothing

[Need](#)  
[Service](#)  
[Referral](#)

Service Provider

Start Date   :        End Date  :  :

Provider-specific Service

Service Notes

Service Type

Source 1       Cost Of Service 1

Source 2       Cost Of Service 2

# of Units       Unit Type       Cost of Units

Service Followup Date       Actual Followup Date       Followup Made

**Referral**

Referral Date

Projected Followup Date       Actual Followup Date       Followup Made

If Referral Canceled, Reason

**Status and Outcome**

Status       Outcome       If Not Met, Reason

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.



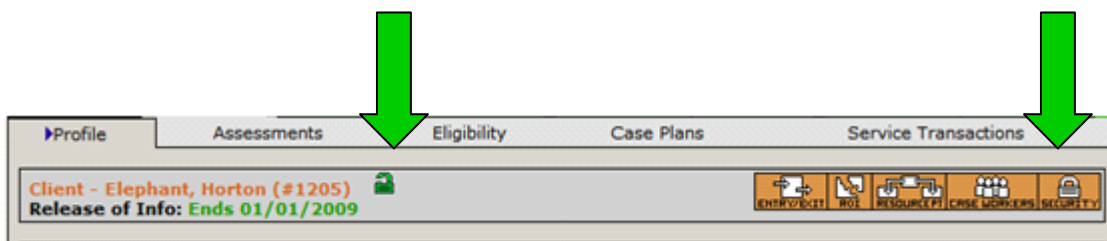
Don't do the following unless you have specific instructions from your Regional Coordinator:

- 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.