VA ClientPoint Entry/Exit Workflow

ClientPoint Entry

A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. *Client Search*
   1. Click on **ClientPoint**
   2. Enter Head of Household's Name &/or partial SSN
   3. Click **Search**
      a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of the client's name
      b. If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

C. *Client Profile*
   1. *Back Date Prompt*: change the date to match the intake date and click **Set New Back Date**
   2. Click on the pencil next to **Client Demographics.** Fill in the appropriate information and click **Save**.
   3. Add or update additional information
      a. "Client Profile: all projects" – *only complete additional racial data elements if the client identifies with more than two groups*

D. *Households*

<u>If the client is presenting as a single client, skip this tab.</u>

   1. Click on **Households** tab
   2. If no household appears, click **Start New Household**
      a. Select appropriate **Household Type**
      b. Search for additional household member(s)
         - Enter another household member's Name.
         - Click **Search**
           - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of that client's name.
           - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information.**
      c. Repeat the search until all household members are listed in the "Selected Clients" section
      d. Click **Continue**

e. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.
f. Click **Save & Exit**

3. If a household is showing on this tab, verify/update household details by clicking **Manage Household**
    a. Verify **Household Type**
    b. Remove household member(s) by clicking the red circle next to their name.
    c. Add household member(s) by clicking **Add/Delete Household Members**
        - Click the arrow to expand **Add Clients to the Household** section
        - Search for additional household member(s)
            - Enter another household member's Name.
        - Click **Search**
            - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of that client's name.
            - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information.**
        - Repeat until all household members are listed in the "Select Clients" section
        - Click **Continue**
    d. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.
    e. Click **Save & Exit** once complete

E. Release of Information (ROI)

<u>STOP HERE & CONTACT THE DATA CENTER if the client marked "NO" to any section of the ROI</u>

1. Click on **ROI** tab
2. Click **Add Release of Information**
    a. Select all members of household
    b. Fill in **Release Granted**
    c. Fill in **End Date** with date one year from date signed
    d. Select **Documentation** type
    e. Fill in **Witness** full name
    f. Click **Save Release of Information**

F. Entry/Exit

1. Click **Entry/Exit** tab
2. Click **Add Entry/Exit**
3. Confirm Project Start Data
    a. If there is more than one client entering, check the box next to each additional household member that is entering the project. *Anyone not checked will be excluded from the project.*
    b. Confirm the **Provider** listed is correct.

- *The default provider appearing will be whatever was selected under Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and research for the head of household.*

c. Select **VA** as the Type
d. Confirm the **Project Start Date**
e. Click **Save & Continue**

4. Complete the assessment
   - *If the screen reads "No Entry Assessment had been specified for this Provider", the wrong project type was selected. Scroll to the top of the screen. Select the correct **Type** from the drop menu. Click **Update.***
5. Click **Save**
6. Scroll to the top of the assessment then click on the name of the next additional household member from the "Household Members" menu on the left.
7. Repeat steps 4-6 until all household member data has been entered.
8. Click **Save & Exit**

If adding services, please refer to last section of this guide for how to add a service

ClientPoint Interim (Update/Annual Assessment)

A. Home Dashboard

1. Log into HMIS@NCCEH
2. Click **Enter Data As** then click the green plus next to the project for which you are entering data

B. Client Search

1. Click on **ClientPoint**
2. Enter the head of household's HMIS ID number or search by the head of household's name
3. Set **Back Date Mode** for the date that the update was completed. Click **Set New Back Date**

C. ROI

This step is only required if completing an Annual Assessment for client's anniversary

1. Click on **ROI** tab
2. Click **Add Release of Information**
   a. Select all members of household
   b. Fill in **Release Granted**
   c. Fill in **End Date** with date one year from date signed
   d. Select **Documentation** type
   e. Fill in **Witness** full name
   f. Click **Save Release of Information**

D. Entry/Exit

1. Click **Entry/Exit** tab
2. Click **Interim** icon listed within your project's row
3. Click **Add Interim Review**
4. Complete Interim Review Data

   a. If there is more than one household member served in the project, check the box next to each additional household member that is participating in the project.
   b. Select the **Interim Review Type**
      - "Update": completed anytime information has changed since project entry
      - "Annual Assessment": required assessment for all clients remaining in a project after one year; Annual Assessments must be completed within 30 days before or after the Head of Household's project start anniversary date (example: if the HoH entered the project on 3/17/2022, the Annual Assessment would need to be completed between 2/15/2022 and 4/16/2023) .
   c. Confirm the **Review Date**
   d. Click **Save & Continue**
5. Update assessment information
   - *For tips and more details about how to update HUD sub-assessments (for income, disabling condition, non-cash benefits, and health insurance), please view the following Tip Sheet/Guide: Updating HUD Verification Sub-Assessments*
6. Click **Save & Exit** once all assessments for all household members have been completed.

If adding services, please refer to last section of this guide for how to add a service

ClientPoint Exit

A. Home Dashboard
1. Log into HMIS@NCCEH
2. Click **Enter Data As** then click the green plus next to the project for which you are entering data

B. Client Search
1. Click on **ClientPoint**
2. Search for the client that is exiting the project (name search or HMIS ID search)
3. Set **Back Date Mode** for the date that the client is exiting the project. Click **Set New Back Date**

C. Entry/Exit
1. Click **Entry/Exit** tab
2. Click the pencil next to the Exit Date column within your project's row
3. Complete Exit Data
   a. If there is more than one client exiting, check the box next to each additional household member that is exiting the project.
   b. Confirm the **Exit Date**
   c. Select **Reason for Leaving**
   d. Select **Destination.**
   e. Click **Save & Continue**
4. Complete exit assessment information.
5. Click **Save & Exit** once all assessments for all household members have been completed.

Adding Services

1. Click **Service Transactions** Tab
2. Click **Add Service**
3. Check that all household members receiving the service are checked
4. Confirm that the correct **Service Provider** is displayed and that your **Start Date** and **End Date** are correct. *The start and end date fields should match the day the client was provided this particular service.*
5. Select the correct service from the **Service Type** drop down menu
6. Click **Save & Continue**
7. Scroll down to the **Need Information** section to update the "Need Status" and "Outcome of Need" according to the client's situation.
8. Click **Save and Exit**