Outreach Data Entry in HMIS ServicePoint

Purpose

The purpose of this document is to instruct Outreach Program Staff how to enter client data consistently and efficiently in HMIS ServicePoint.

Glossary

EDA – Enter Data As: A mechanism in HMIS that allows users to enter and view data from a single program's point of view.

'Less is More' Search: Enter the least amount of data to pull back a wide array of results to ensure the client does not already have a record in HMIS.

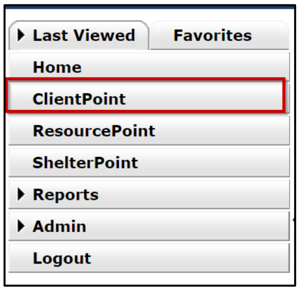
Client ID: Unique identifier to protect privacy. When communicating electronically, please use HMIS ID, not name.

Client-centric: Record data from Client's perspective.

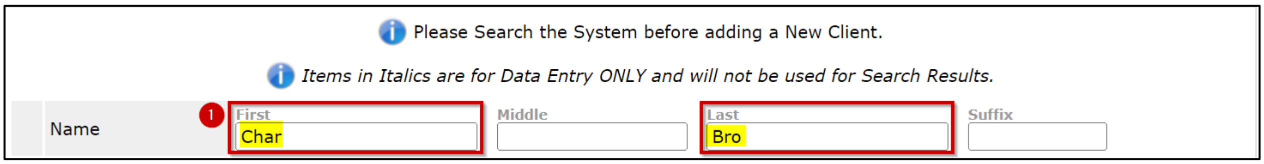
HMIS Steps

Step 1: ClientPoint – Client Search

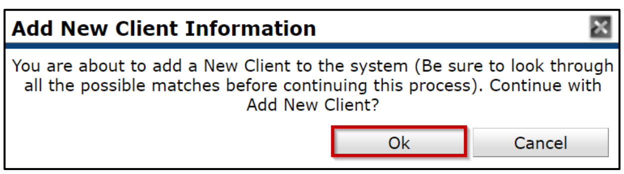
1. Ensure you are **EDA'd correctly**.
2. From the menu, select ClientPoint.



3. Establish if Client Record already exists in HMIS by ‘**less is more**’ search.
    a. Type first few letters of both first and last name and press ‘Search’. (This will check the system for possible records that may already exist.)



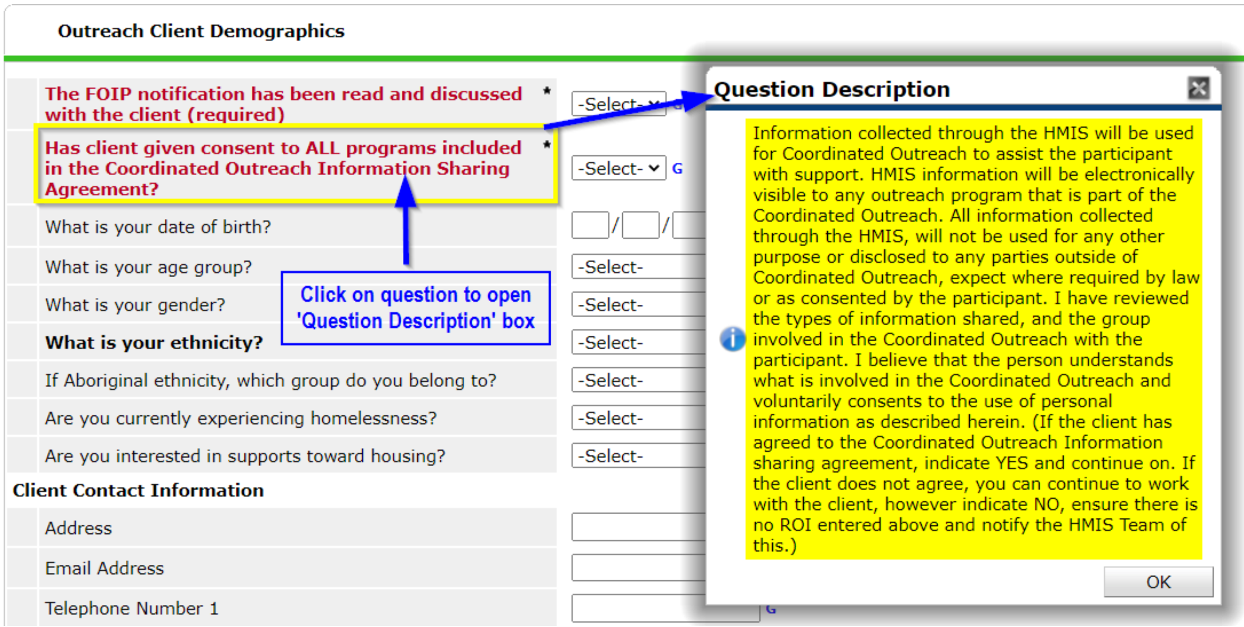
    b. At bottom of screen, check ‘Client Results’ for search results
        i. If client appears, press the hyperlink
4. IF NEW CLIENT:
    a. Type full name correctly in First & Last Name search fields
    b. Press ‘Add New Client With This Information’
    c. A warning window will pop up reminding you to check the system for duplicate client profiles
    d. Press ‘Ok’ to continue.



5. If edits to Client’s name are needed, proceed to ‘Editing an Existing Outreach Client Profile’ (page 13)

Step 2: Summary Tab – FOIP & Agreement to Share Information with Coordinated Outreach

6. Under the Summary Tab (a sub-tab of the Client Information Tab), scroll down the screen to the questions in red writing (under Outreach Client Demographics)
    a. Update **FOIP Notification**
    b. Click on the next question, “**Has Client given consent…**”, to open its ‘Question Description’ window



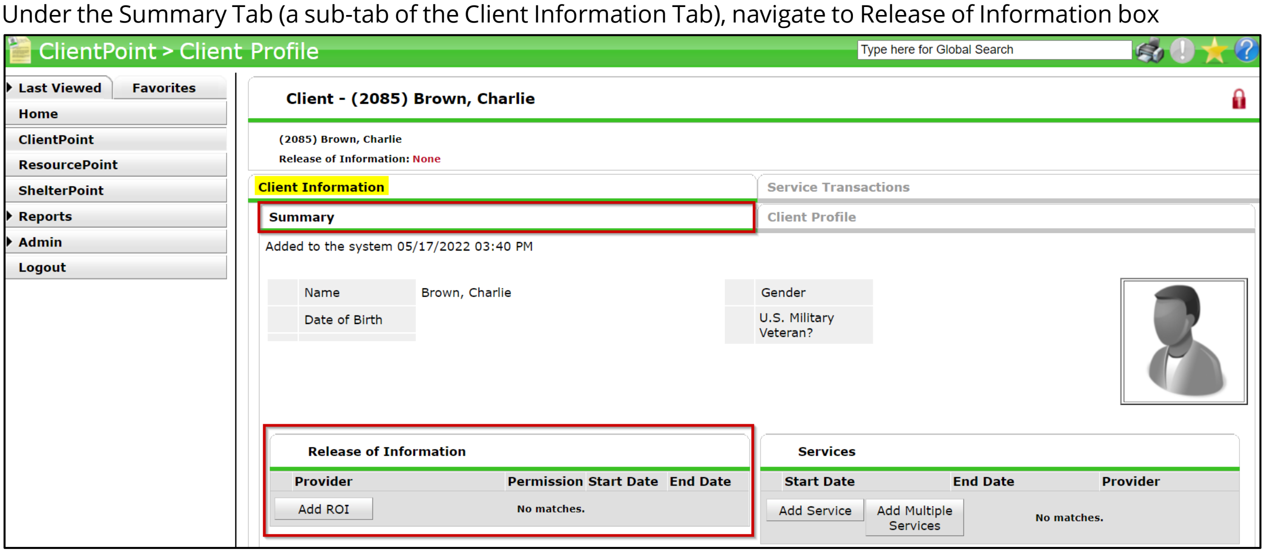
c. Read the text of the question description thoroughly and answer
    i. Select YES if client agrees to share info with other Outreach Agencies,
    ii. Select NO if client does NOT agree to share info with other Outreach Agencies

d. **If NO is selected, email HMIS Team (hmis@calgaryhomeless.com) so they can perform steps to lock down client visibility. Continue to work with the client.**

Step 3: Summary Tab – ROI

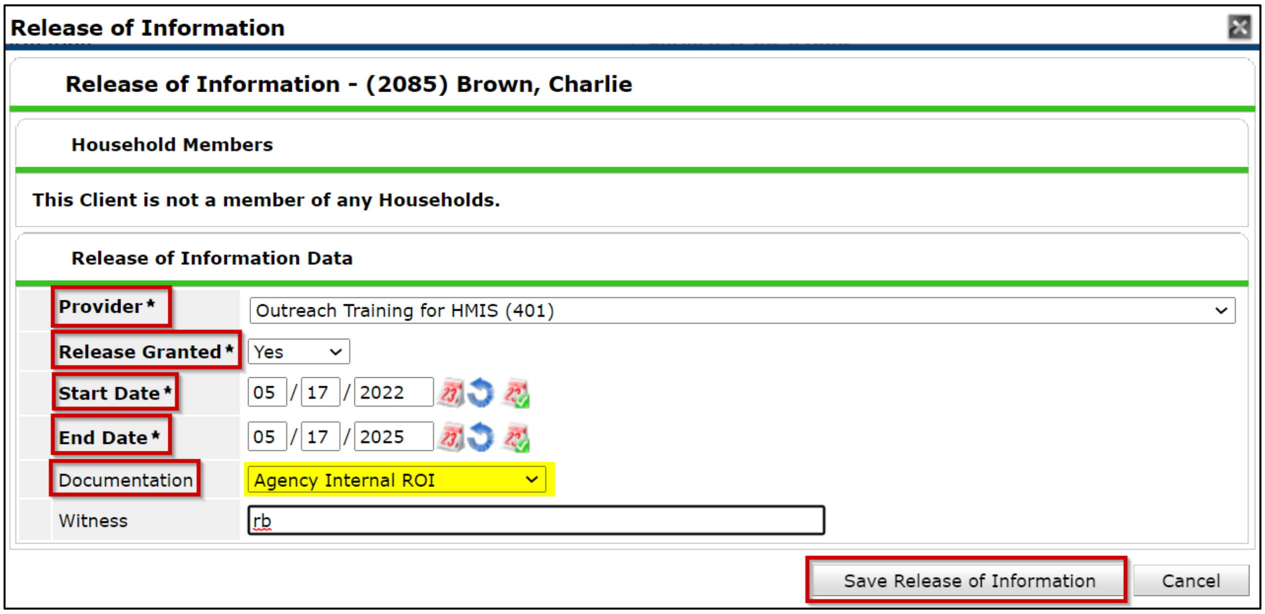
***NOTE: Only add an ROI if the Client agrees to share information with other Coordinated Outreach Agencies. DO NOT add an ROI if the Client DOES NOT agree to share information with other Coordinated Outreach Agencies. In this case, skip this step, email the HMIS Team, and move on to Step 4 (Outreach Client Demographics).**

7. Under the Summary Tab (a sub-tab of the Client Information Tab), navigate to Release of Information box

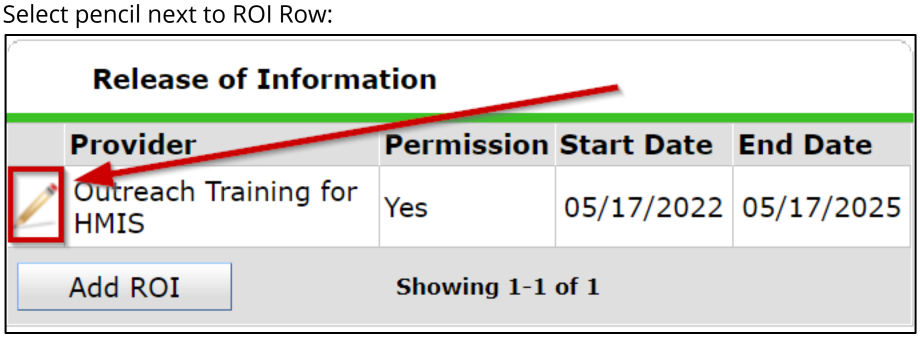


8. Press 'Add ROI' to add an ROI row

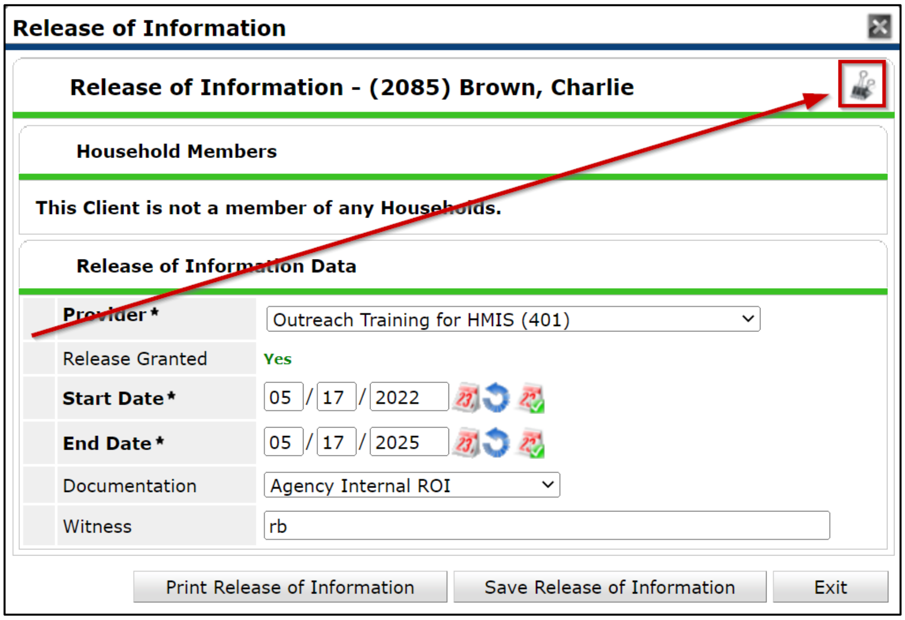
a. Ensure Correct Provider
b. Indicate Yes/No to 'Release Granted'
c. Enter Start and End Dates for ROI (3 years)
d. Documentation: enter 'Agency Internal ROI'
e. Witness: enter name of witness
f. Press 'Save Release of Information'



9. Applicable agencies are required to upload the document, *Coordinated Outreach ROI*. If in doubt, please upload to be safe and/or contact the HMIS Team for confirmation.
   a. Select pencil next to ROI Row:

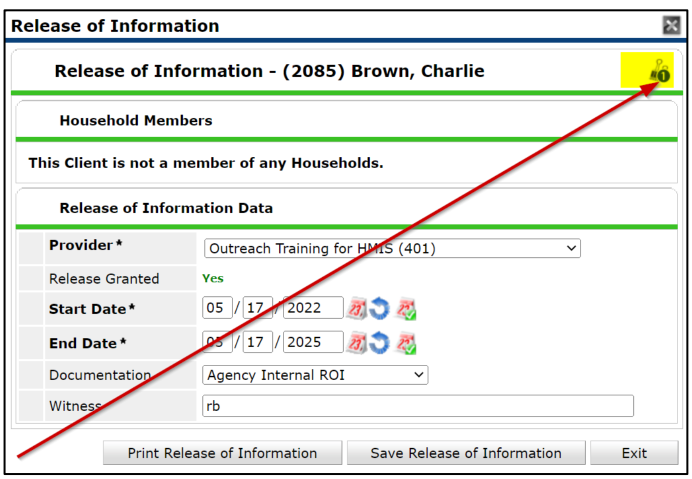


   b. Press paperclip in top right-hand corner of ROI window:



c. Press 'Add New File Attachment'
d. Press 'Choose File' to select the correct document from computer folder
e. Press 'Upload'

*To view if an ROI has already been uploaded to the Client Profile, select the pencil next to the ROI row. If an attachment exists a digit will appear informing how many attachments are uploaded:

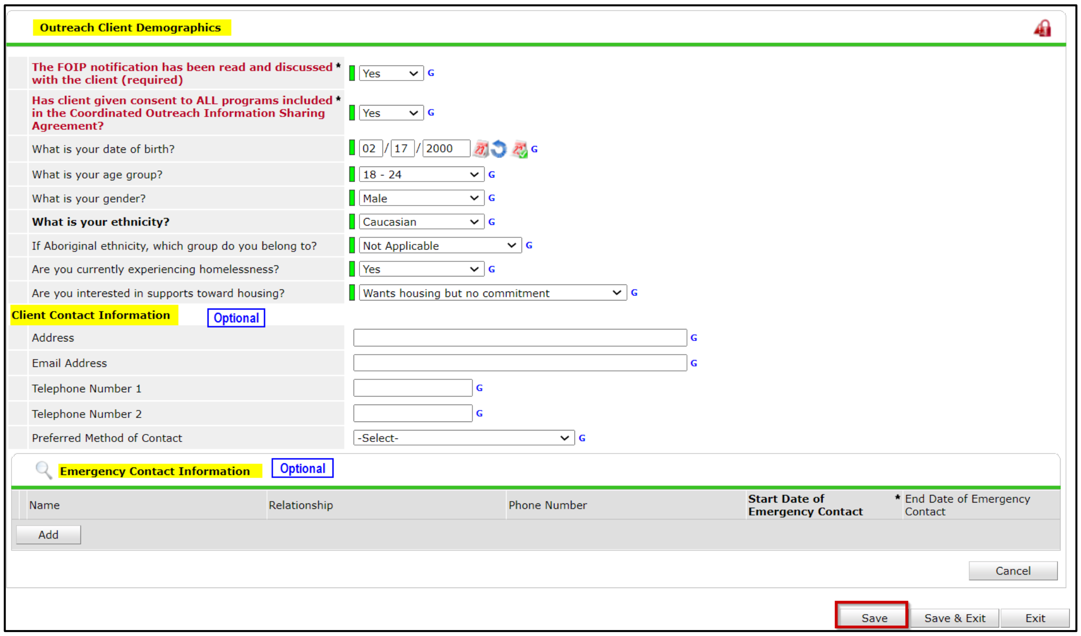


**Ensure current version of the Coordinated Outreach ROI is used by downloading from [HERE](). Within the ROI a link exists to a list detailing all agencies participating in Coordinated Outreach.*

Step 4: Summary Tab – Outreach Client Demographics

10. Under the Summary Tab, navigate to 'Outreach Client Demographics'
11. Enter the client-centric information for the following fields:
    a. Date of Birth
    b. Age Group
    c. Gender
    d. Ethnicity

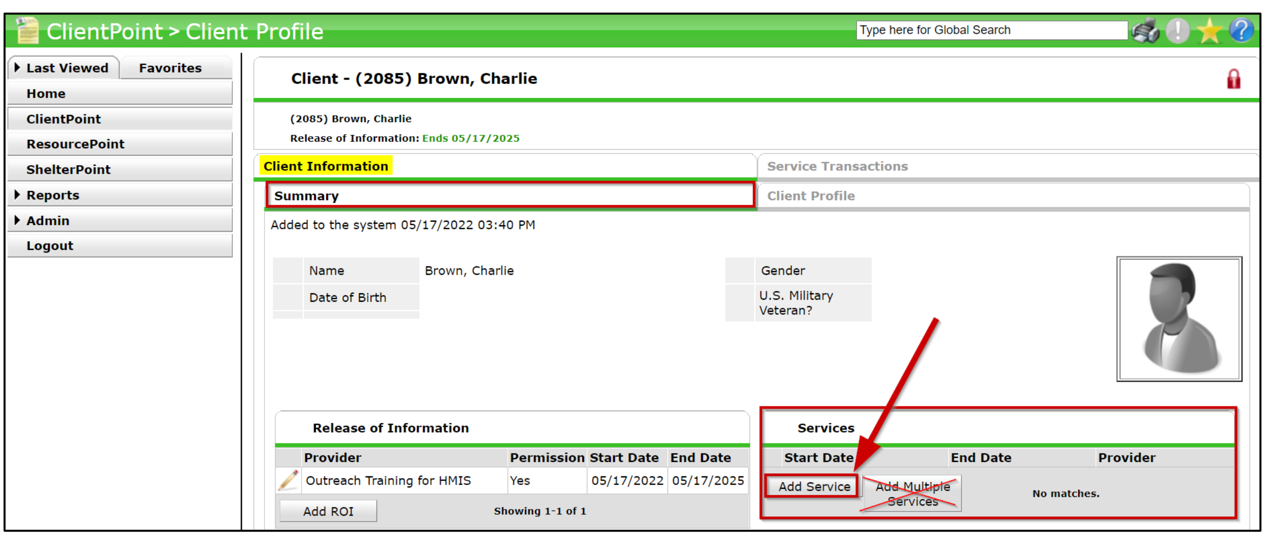
   e. If Aboriginal
   f. Are you currently experiencing homelessness?
   g. Are you interested in receiving housing supports?
12. Update Client Contact Information as needed. (This is an OPTIONAL section.)
13. Press ‘Add’ to update Emergency Contact Information. (This is an OPTIONAL section.)
14. Press ‘Save’



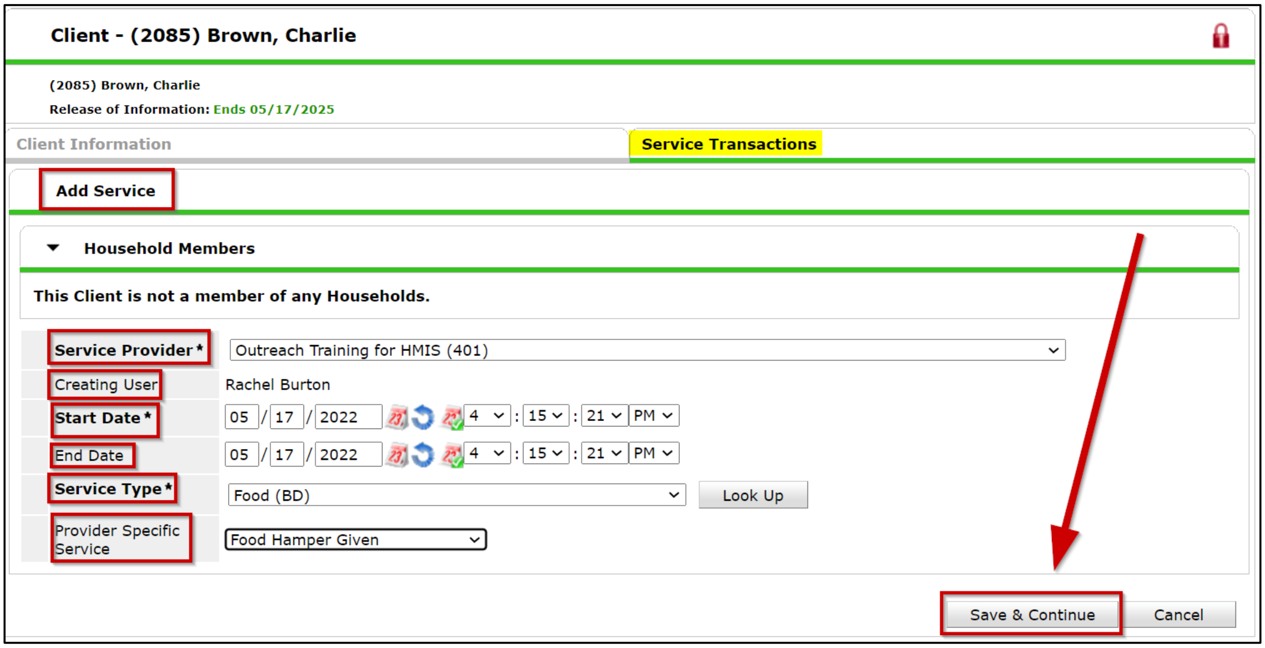
**Once saved, the green history bars will appear.*
***Questions are client centric; please record what the client reports to you.*

Step 5: Summary Tab – Services

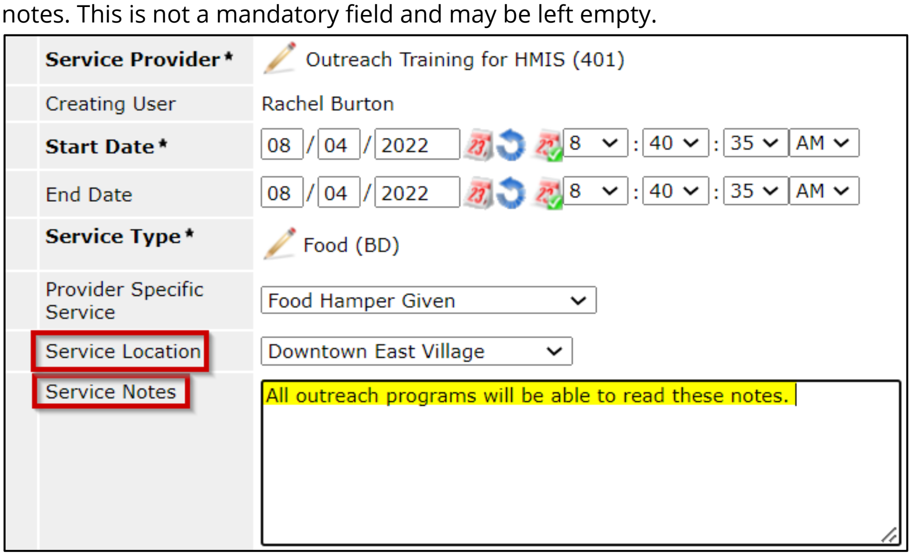
15. Under the Summary Tab, navigate to ‘Services’
   a. Press ‘Add Service’
      - **NOTE:** Do NOT use ‘Add Multiple Services’ since Provider specific fields will be unavailable.



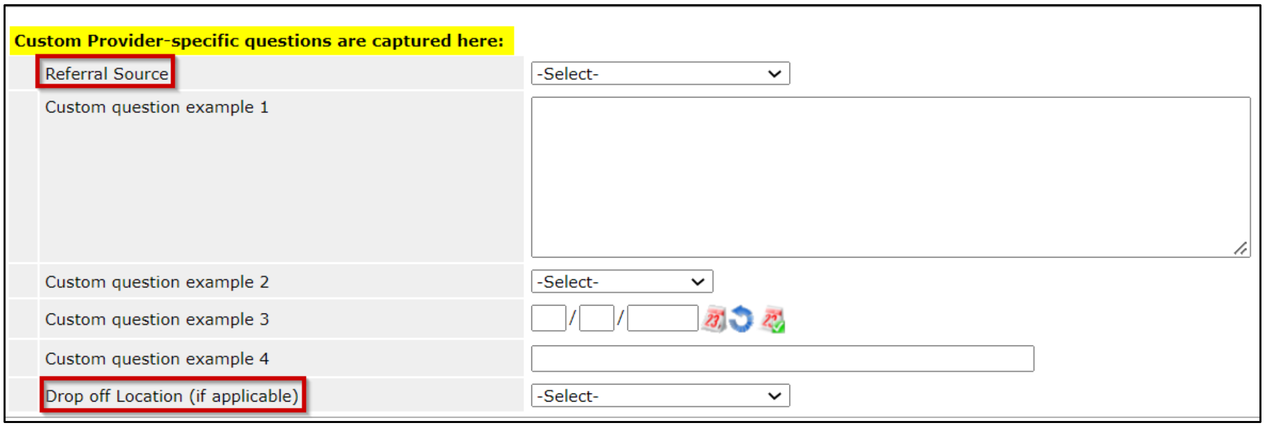
16. You will be directed to the 'Add Service' Tab (a sub-tab of the Service Transactions Tab).
    a. Ensure correct Provider
    b. Update the start and end dates in which service was provided
    c. Indicate Service Type
    d. If applicable, indicate Provider Specific Service
    e. Press 'Save & Continue'



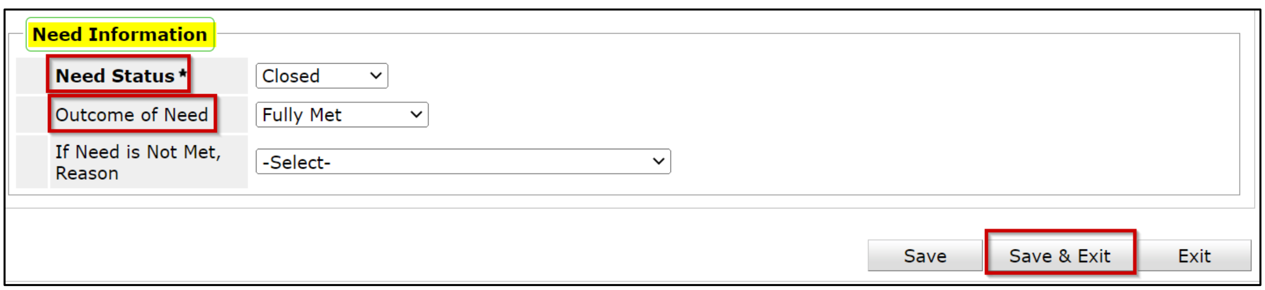
17. Indicate the Service Location
18. Indicate any 'Service Notes' that may apply. Please note all outreach programs will be able to read these notes. This is not a mandatory field and may be left empty.



19. Scroll down the screen, to Custom Provider-specific questions.
    a. If your Outreach program has custom questions, you will see them here. Please complete the applicable fields.



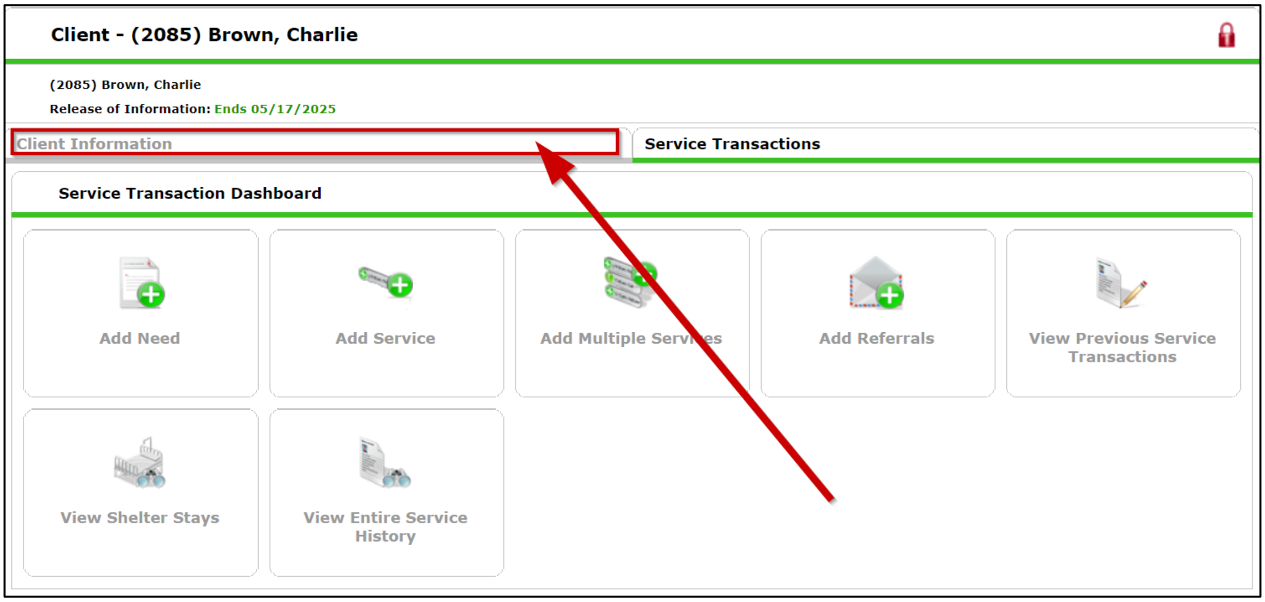
20. Continue to scroll down the screen and skip the following sections:
    a. Service Costs
    b. Funding Sources
    c. Support Documentation
    d. Follow up Information
21. Under Need Information, update:
    a. Need Status – to 'Closed'
    b. Outcome of Need – to 'Fully Met'
        i. If applicable, update 'If Need is not Met, Reason'
22. Press 'Save & Exit'



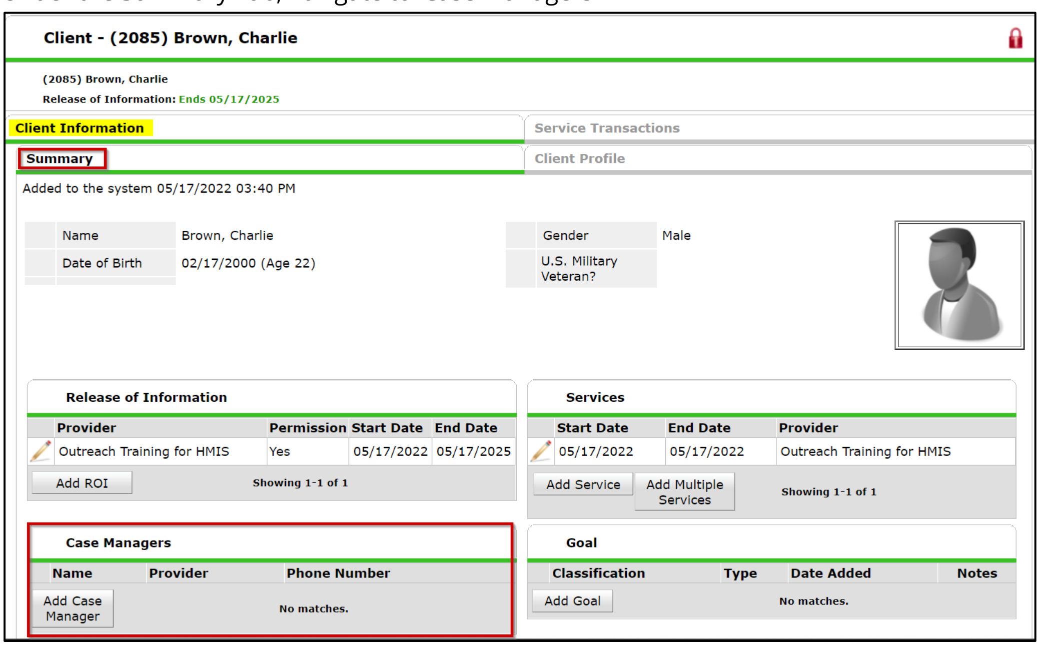
23. If additional services are required, repeat Steps 15 – 22

Step 6: Summary Tab – Case Managers

24. Navigate to the Client Information Tab

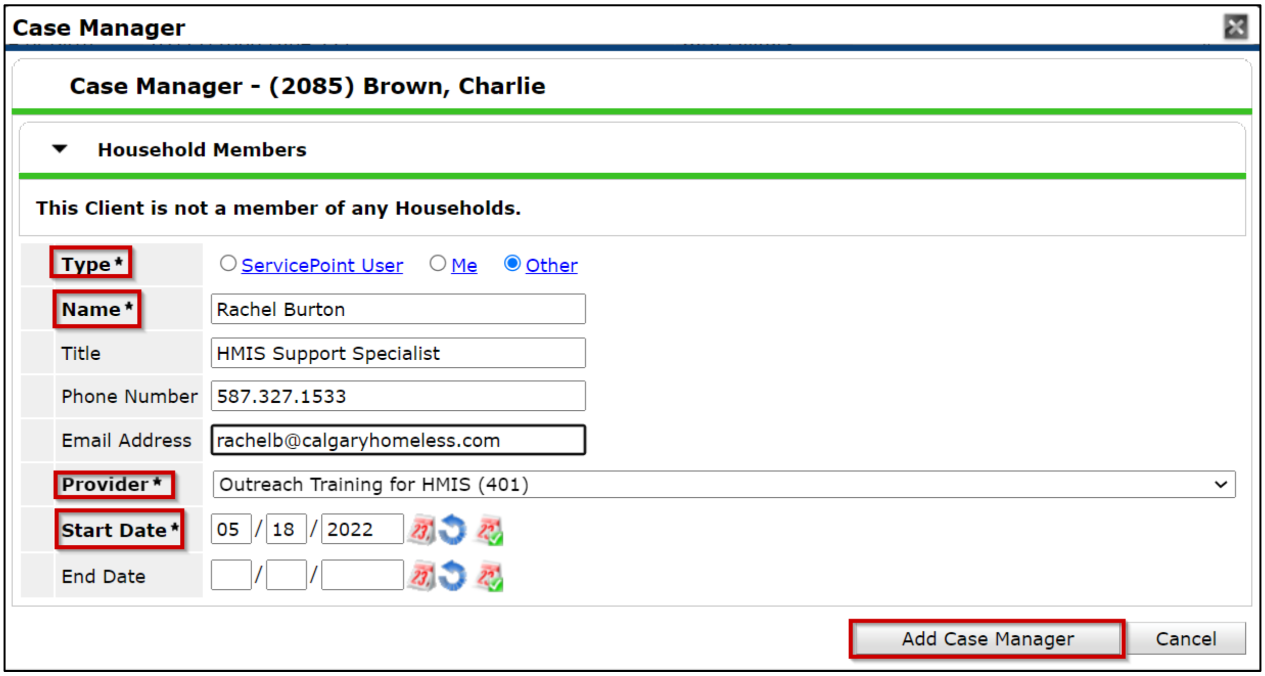


25. Under the Summary Tab, navigate to ‘Case Managers’



26. Press ‘Add Case Manager’.
27. There are 3 ways to assign a case manager. Use method the works best for you:
    a. Select ‘ServicePoint User’.
        i. Next to ‘Select User’, ensure provider is correct, and then below will be a list of all HMIS users with your provider
        ii. Select appropriate individual from list
    b. Select ‘Me’
        i. This will auto-populate based on the information entered in your HMIS User Profile
    c. Select ‘Other’
        i. This allows you to manually type in the information
    d. Update additional information as needed
    e. Ensure Provider is correct

f. Indicate Start Date the Case Manager took client on case load
   i. IF there is an end date (eg. for parental leave), it may be entered in the End Date field
g. Press 'Add Case Manager'

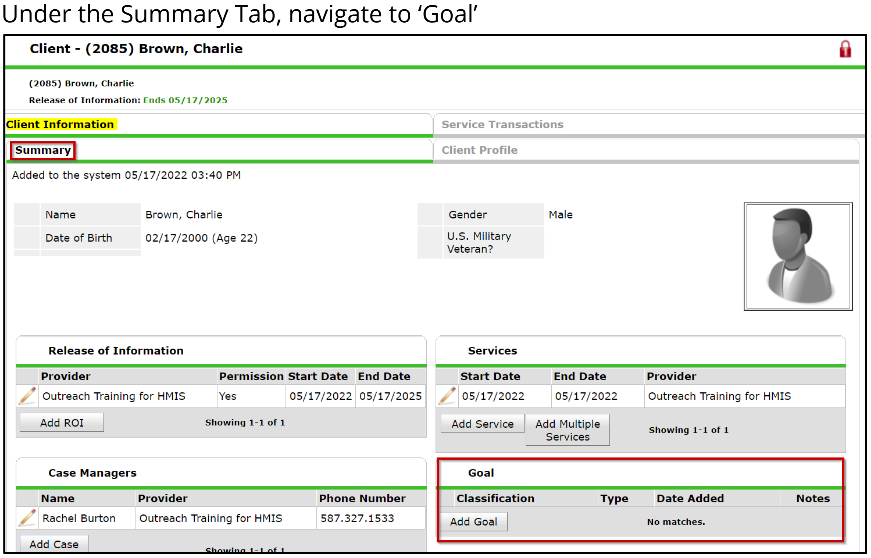


*Bold fields with asterisks are mandatory when adding a Case Manager
**Adding a Case Manager is not mandatory, but is highly recommended

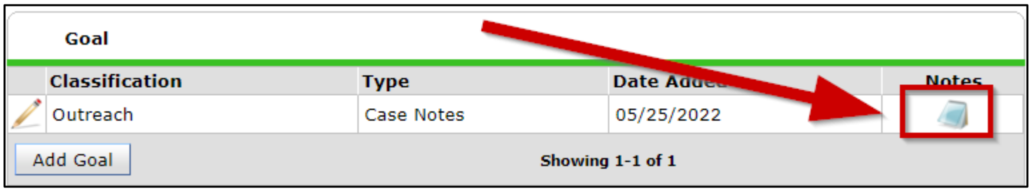
NOTE: To delete a Case Manager, enter 'today' as the end date. This will remove the individual as a case manager.

Step 7: Summary Tab – Goal (Case Notes)

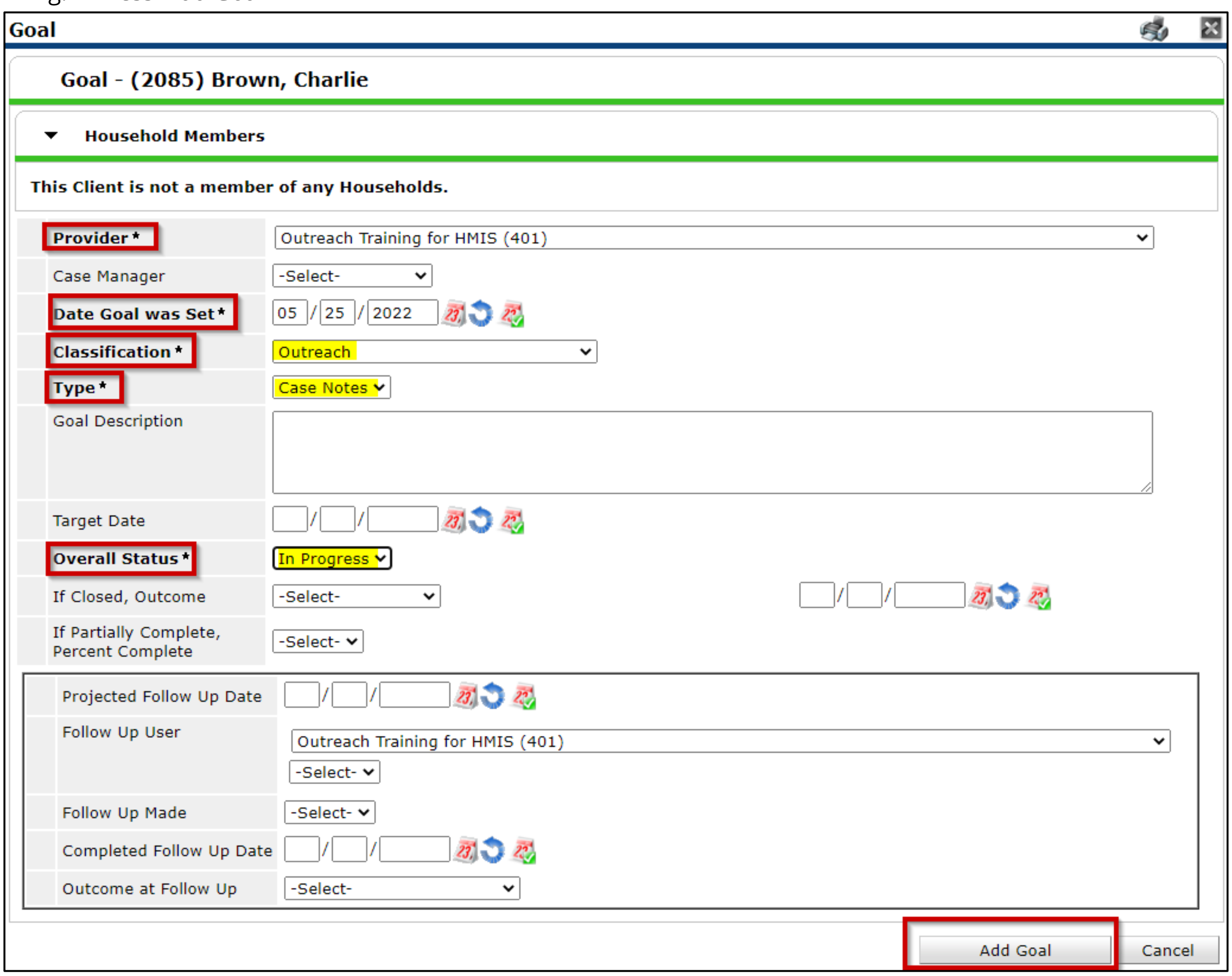
28. Under the Summary Tab, navigate to 'Goal'



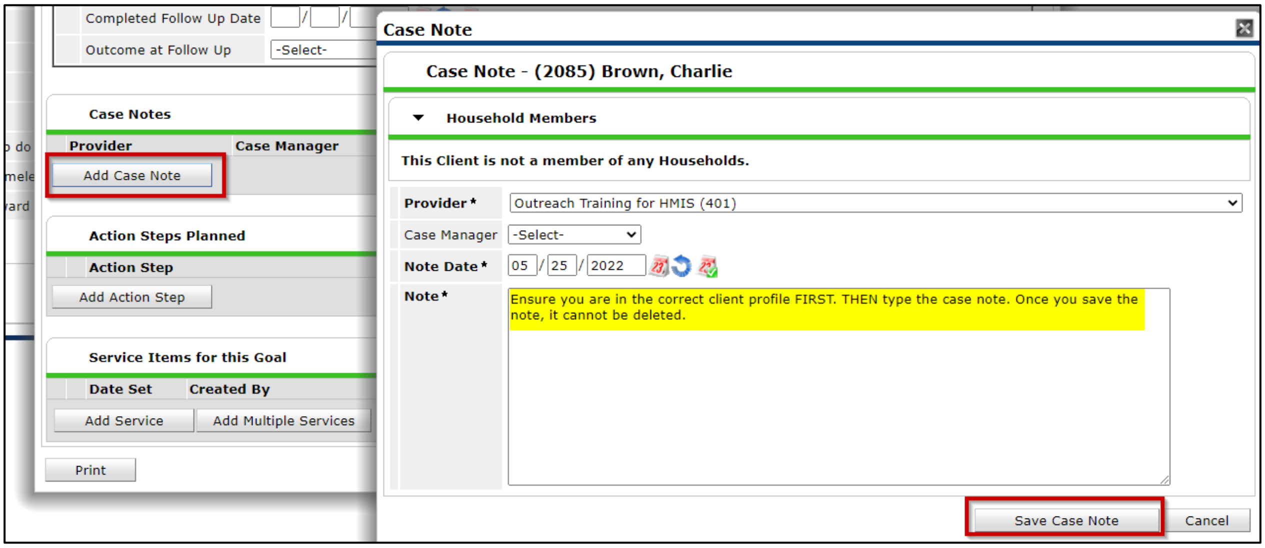
*If the goal/folder already exists, please do not create a new one. Simply click on the note pad to add a new note.



29. To create a **new** goal/folder, press 'Add Goal'
    a. Ensure Provider is correct
    b. If applicable, select case manager
    c. Indicate date the Goal was set (in other words, the date the folder was created).
    d. Indicate 'Outreach' as Classification
    e. Indicate Type as 'Case Notes'
    f. Indicate 'Overall Status' as 'In Progress'
    g. Press 'Add Goal'



30. Press 'Add Case Note' to begin adding case notes to the Goal/Folder.
31. Type the case note.
32. Press 'Save Case Note'.

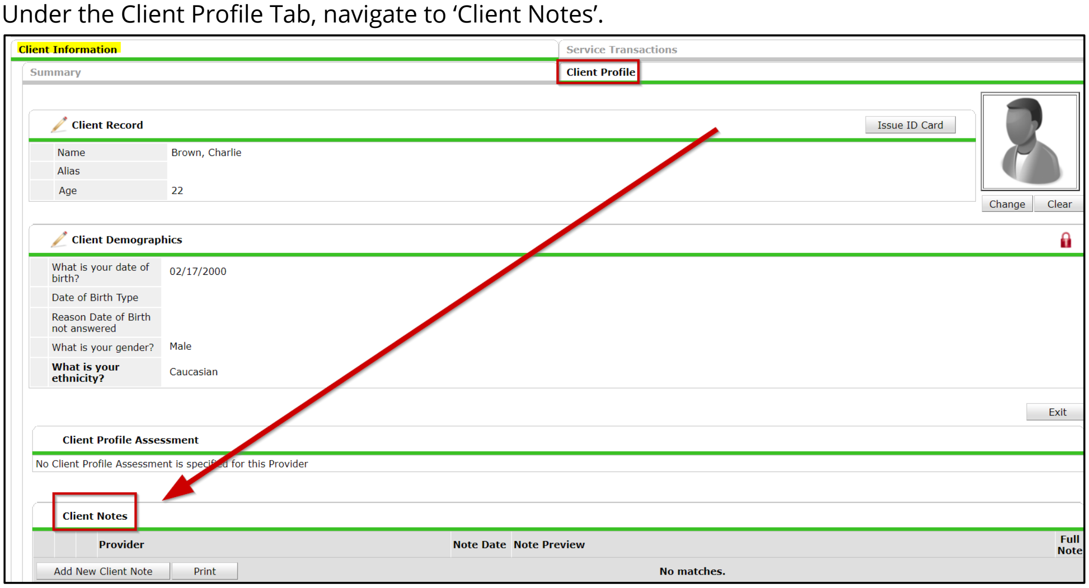


*Ensure you are in the correct client's profile before saving the case note. Case notes cannot be deleted. If you save the case note to the wrong client profile, make an amendment note in the goal/folder impacted, and then email the HMIS Team (hmis@calgaryhomeless.com)

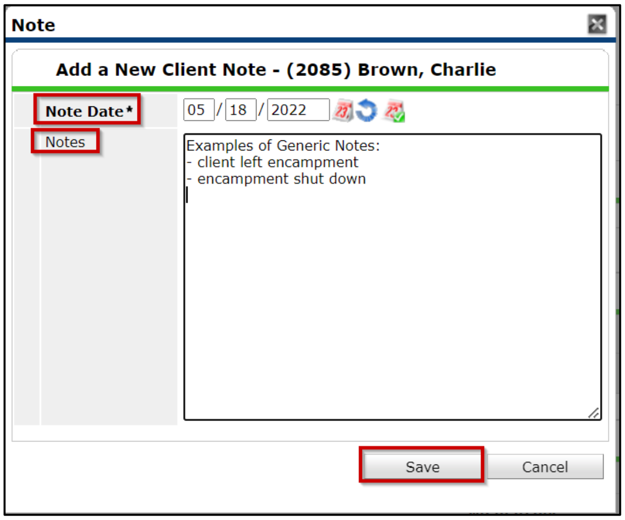
Step 8: Client Profile Tab – Client Notes

To support knowledge transfer between case managers and agencies, there is a tool available for generic client notes to be recorded (e.g., 'Client left encampment').

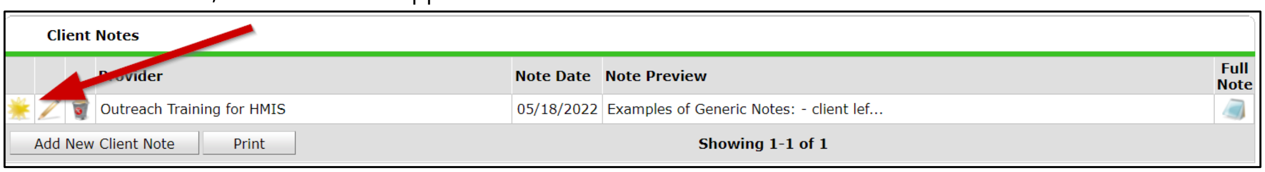
33. Under the Client Profile Tab, navigate to 'Client Notes'.



34. Press 'Add New Client Note'.
    a. Indicate date
    b. Enter generic note
    c. Press Save



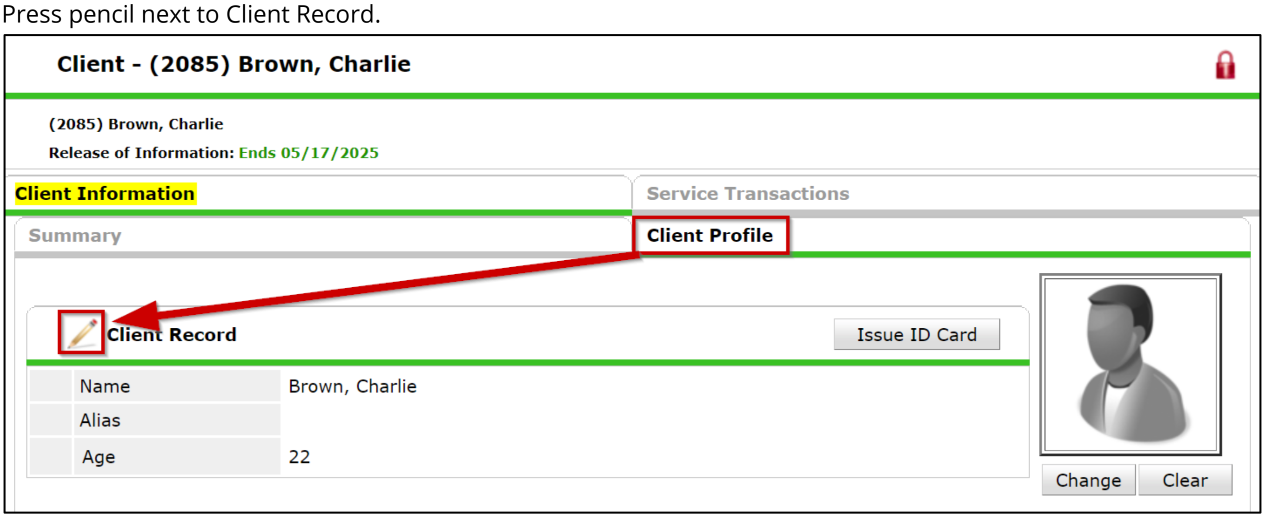
35. Once note is saved, a sunbeam will appear next to it:



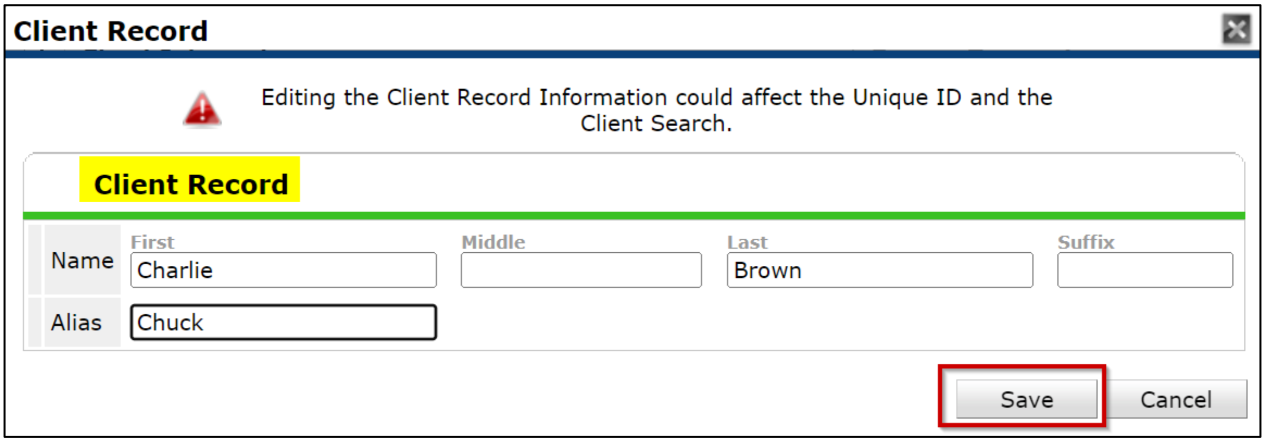
36. The sunbeam ensures the note pop ups for all HMIS Users who access the Client Profile. To deactivate the pop-up (in other words, resolve the note), press the sunbeam. This will remove the pop-up from all HMIS Users accessing the Client Profile.

Editing an Existing Outreach Client Profile

1. If edits are required to the Client's Name or Alias, navigate to the Client Profile Tab.
2. Press pencil next to Client Record.



3. In the 'Client Record' window, manually type edits in the required fields as needed.
4. Press Save.



Follow Steps 2 through 6 as applicable. (e.g., If a client already has a valid ROI from your program, there is no need to add a new ROI each time you open the client profile.)