 **Common Assessment Workflow** (REV 8/20/2018)

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| |  | | --- | | **Tips:**   1. **Click “Enter Data As” as soon as you log in.** 2. **Answer EVERY question on the Entry, Update and Exit assessment; NEVER leave anything blank!** 3. **Never create a brand new HMIS record; Single Point of Entry will do this.** | | | |
| ***Enter Data As*** | | |
| 1 | After logging into Service Point, go to the right hand side at the top and click on the Enter Data As link. | |
| 2 | Click on the Green Plus sign next to the applicable program for which you will be entering the client. | |
| Client Search | | |
| 5 | Go to the Dashboard and click on Client Point: Enter client First and Last name, then Search | |
| 6 | If there is a match, click on the pencil to the left of the client’s name | |
| Summary Tab | | |
| 12 | **Release of Information**   * Click on the ROI button, then “Add Release” * Check household members to include them in the release * Answer Release granted, start and end date * NOTE: Release end date cannot be more than 3 years in the future. * Click Save Release of Information.   ***NOTE: Release of Information is better known as an ROI. This release allows information to be shared from project to project across agencies. You can upload a physical copy of the release of information for clients in the KYHMIS, but agencies must have one on file for each member of the household. The head of household or other adults in the household can sign releases for under 18 year old dependents, however EVERY adult must have their own individual release. Also each adult can decide on the type of release they would like and information can be shared at different levels. Please contact your system administrator for further questions. Clients that do not wish to share information must have their records “locked”. Please contact your system administrator for that action.***  **NOTE: VI-SPDAT**  The VI-SPDAT Tool at the bottom of the Summary Tab is the **old tool** used originally for assessing clients. There are now several SPDAT tools available and these are all found through the “Entry/Exit” tab/button. | |
| Summary Tab | | |
| 13 | *Remain on Summary Screen Verify that you are in EDA Mode*  **Entry/Exits**   * Under “Entry/Exits” click on the “Add Entry/Exit” button * Check appropriate boxes to include Household members in the entry/exit * Provider = the program name will show up here if you are in Enter Data As Mode. * Type = HUD (for HUD-funded programs) * Enter the actual program Entry date, then click SAVE and Continue   Answer all other questions on the “**Louisville CoC & ESG Entry**” Assessment form (you may only skip “Secondary Race” and the secondary DV questions IF APPROPRIATE).  Pay special attention to the 4 subassessment questions:   1. Health Insurance (required for ALL clients of any age being served) 2. Disability (required for ALL clients of any age being served) 3. Income (only required for Heads of Households AND other Adults) 4. Non-Cash Benefits (required for Heads of Households and other Adults)   Be sure to use the “HUD VERIFICATION” link at the right-hand corner above each subassessment table to correctly answer these questions. If changes need to be made upon entry into your project, then be sure to end the old instance with a date one day earlier than entry into your project THEN create the new instance.  *Example:*  *Earned Income was $200 prior to entry into your project and there is a start date of January 1, 2010 with no end date. If the client is entering your project as of July 1, 2018 and now has no Earned Income, then specify an end date for the $200 “Earned Income” instance as of June 30, 2018. Then you must create a new instance of Earned Income, as of July 1, 2018 stating that the client DOES NOT HAVE IT.*  Click Save and Exit.  **COMPLETE THE APPROPRIATE VI-SPDAT**:  Complete the appropriate VI-SPDATs – options are adjacent to the “Louisvile CoC & ESG Entry” Assessment | |
| Enter Client Data (Entry/Exit Screen) for other Household Members | | |
| 14 | Click on the left hand side of the screen to select a household member.  NOTE: The client highlighted in blue is the chosen household member.  Answer all questions.  Click Save at the bottom of the screen, scroll back up towards the top and click on the next household member on the left side of the screen (once you click on the client, they will be highlighted in blue).  When you have finished with the entire household’s information, click on Save and Exit at the bottom of the screen. | |
| To begin again with a new client | |
| 17 | Click on ClientPoint on the left and repeat these steps. | |