Case Management Training: Services

HMIS Permanent Housing Workflow: Entering a Service for a Client

Entering a Service:

- Services are one-time transactions that start and end on the same day.
- Utilize Enter Data As if needed for your workflow.

Find Client

- Find client on ClientPoint.
- Add services from the Service Transactions tab.

Select Service Type

- Select the service type and ensure that the start and end dates are the same.

Complete Prompts on Services Page

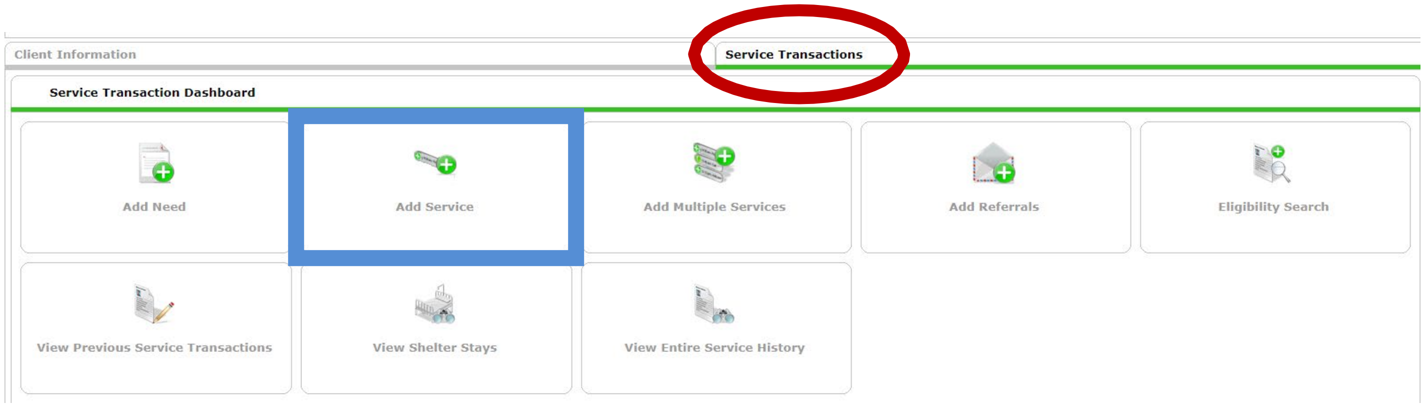
- The Service Costs, Apply Funds for Service, and Follow Up Information prompts are optional unless your agency requires them.
- The Need Information section is required. Need status should always be Closed. Outcome of Need should always be Fully Met.

Review/ Correct Services

- Go to the Services Transactions tab and click the View Entire Service History button.
- Click the pencil next to the service you want to review.
- If you need to delete a service due to an error, click on the trash can by the associated “need”.

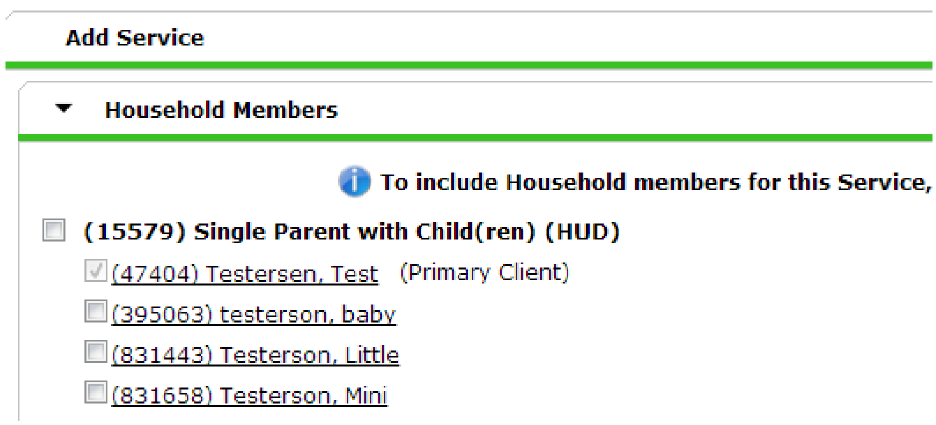
Services for One Client – Service Transactions Tab

This section will cover how to enter services for one client. This will include how to add services one at a time and how to add multiple services are once. Please remember to always be in the appropriate project ("Enter Data As" mode) and time ("Back Date" mode) prior to entering services.

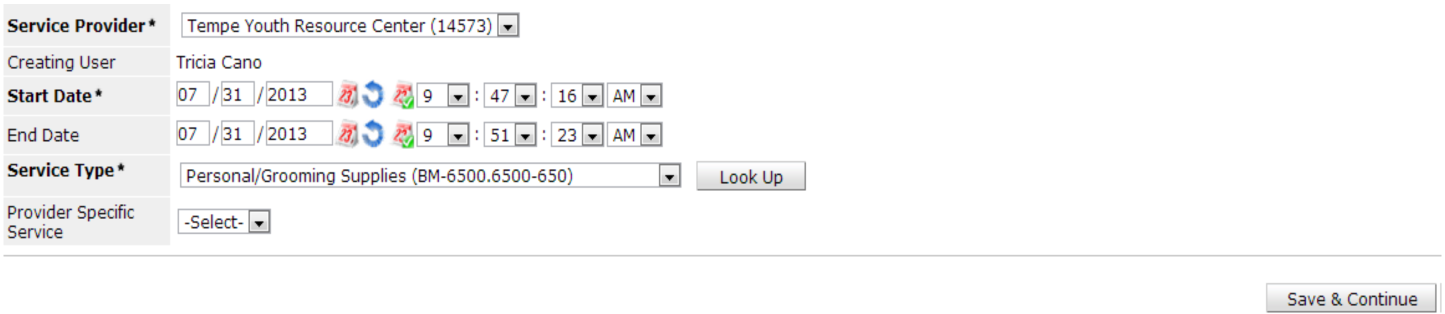


One Service

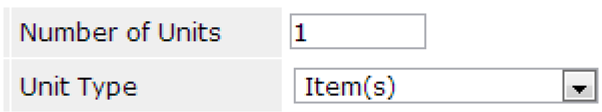
1) Find client and go to Service Transactions tab.
2) Click the Add Service button.
3) If working with a family, record the service on the adult or head of household only.



- Service Provider will default, the Start and End dates will auto populate but ensure they are correct, enter the Service Type, then click Save & Continue.

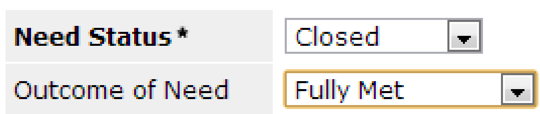


- Scroll down and complete number of units and type of unit *(if applicable).*



- Scroll down and complete need status and outcome, then click Save & Exit.

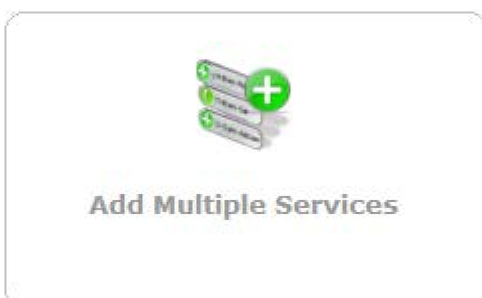
Note: Need Status should always be "Closed" and Outcome of Need should always be "Fully Met"



Multiple services

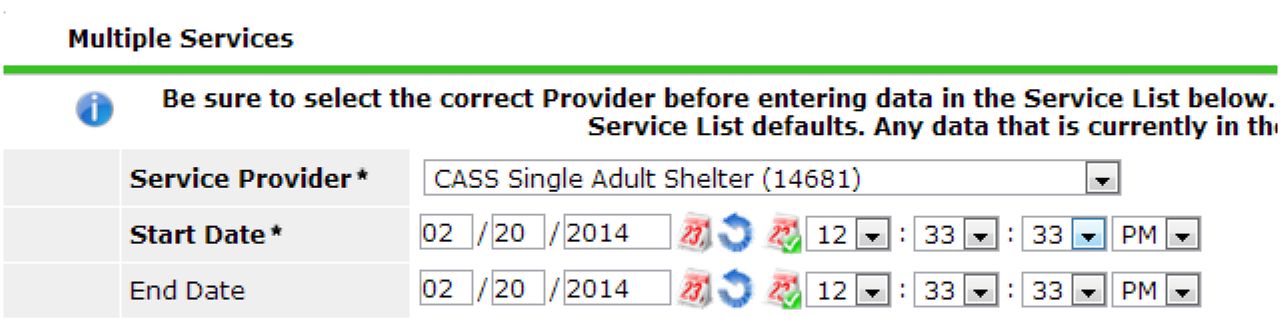
Note: Be in Enter Data As if necessary for your work flow

- Find client and go to Service Transactions tab.
- Click the Add Multiple Services button.

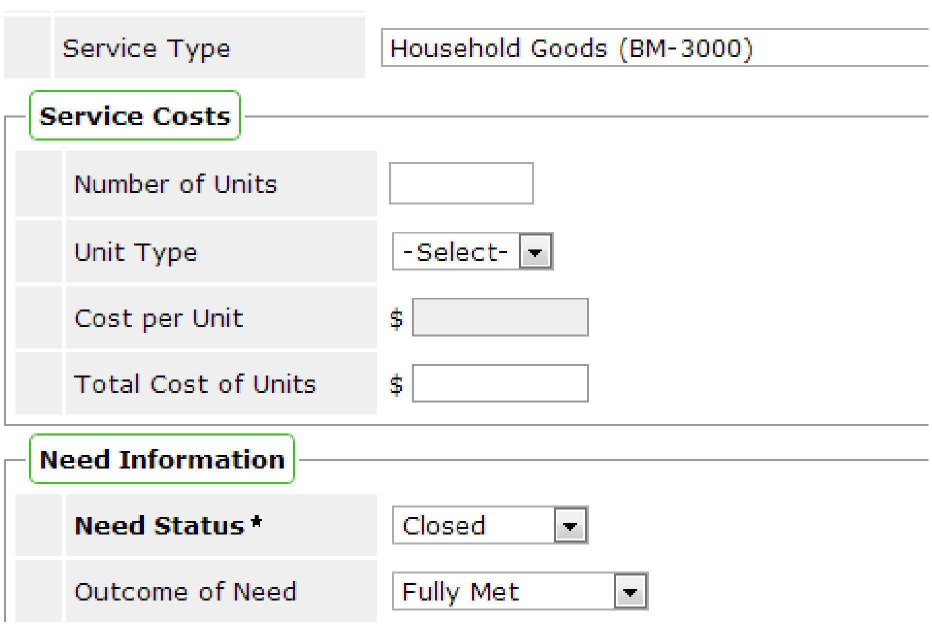


- If working with a family, record the service on the adult or head of household only.

- Service Provider will default, the Start and End dates of the service will auto populate butensure they are correct.



- Choose **FIRST** Service Type, Number of Units & Unit Type (if applicable), Need Status and Outcome.



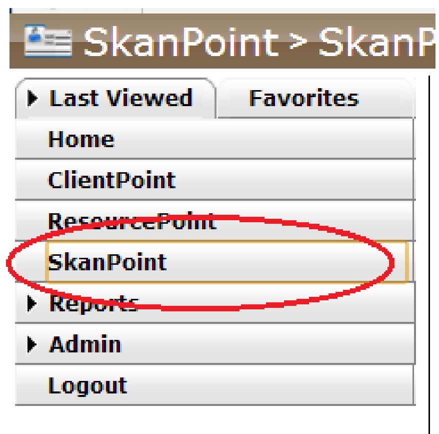
- Click “Add Another” button and repeat steps above until all services rendered are documented.

- Click Save & Exit to complete.

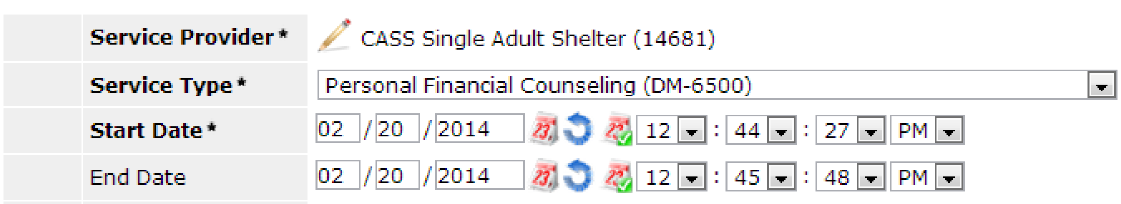
One service on multiple clients (SkanPoint)

Note: Be in Enter Data As if necessary for your work flow

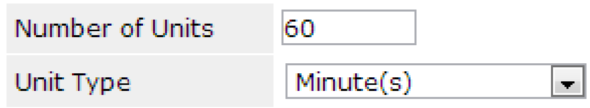
- Click on SkanPoint module.



- Service Provider will default, choose the Service Type needed, and the start and end dates will auto populate but ensure they are correct.



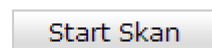
- Complete Number of Units and Unit Type *(if applicable).*



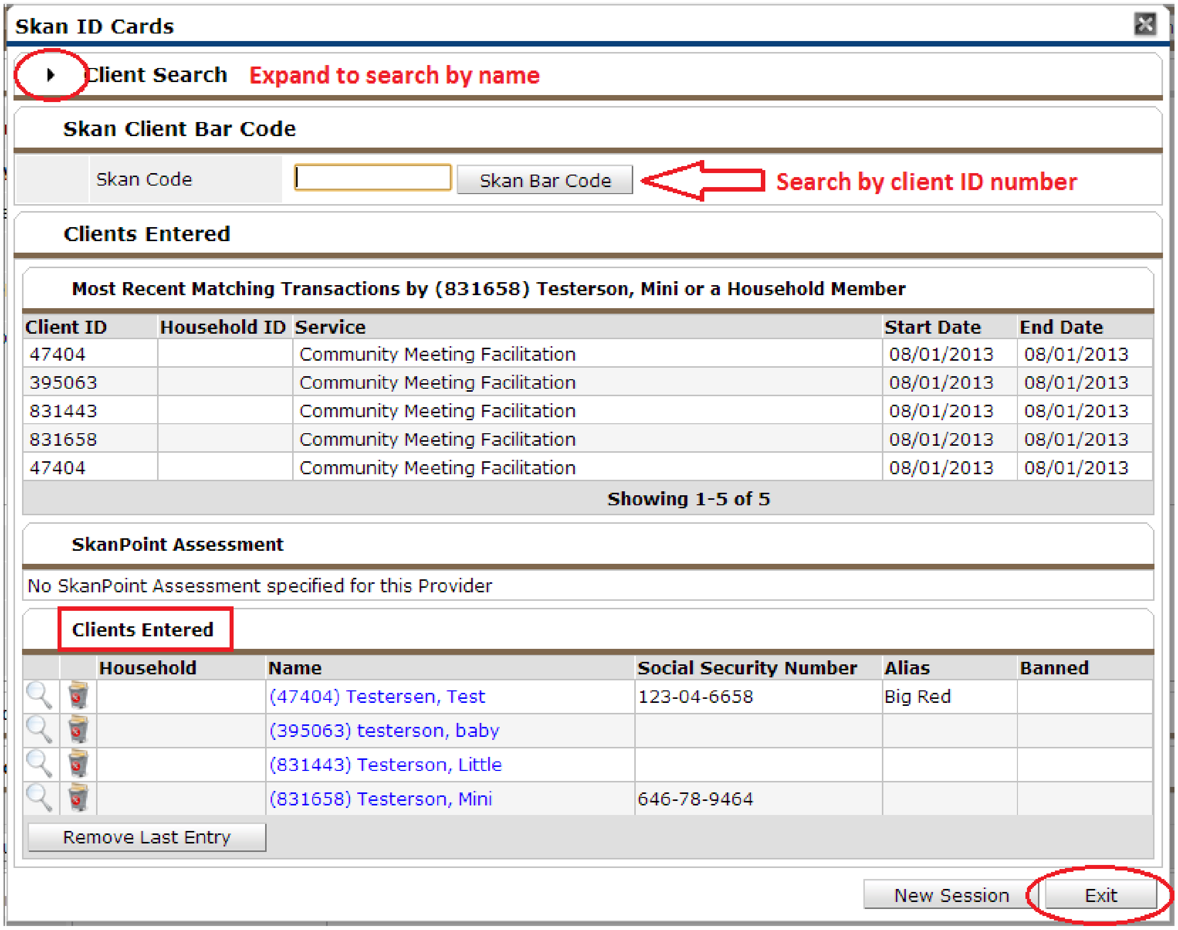
- Select clients that received the service *(see 3 methods of selecting clients on follow pages).*

Three (3) methods to selecting which clients received the service

First method:

- Adding the clients one by one.
- Click the "Start Skan" button. 

- You can search for each client that received the service by either their name (click small black arrow to expand client search section) OR by their HMIS ID number.
- Once all clients that participated are listed below in the Clients Entered section, click the Exit button to record service for each of these clients and finish the transaction. *You will not get a confirmation message.*



Skan ID Cards

Client Search Expand to search by name

Skan Client Bar Code

Skan Code | Skan Bar Code | Search by client ID number

Clients Entered

Most Recent Matching Transactions by (831658) Testerson, Mini or a Household Member

Client ID	Household ID	Service	Start Date	End Date
47404		Community Meeting Facilitation	08/01/2013	08/01/2013
395063		Community Meeting Facilitation	08/01/2013	08/01/2013
831443		Community Meeting Facilitation	08/01/2013	08/01/2013
831658		Community Meeting Facilitation	08/01/2013	08/01/2013
47404		Community Meeting Facilitation	08/01/2013	08/01/2013

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SkanPoint Assessment

No SkanPoint Assessment specified for this Provider

Clients Entered

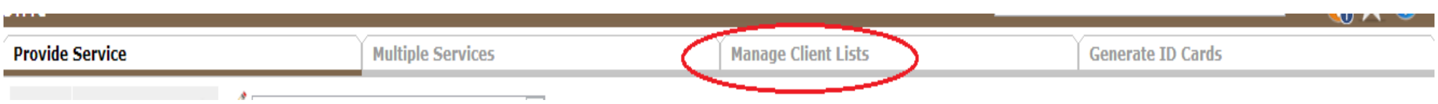
Household	Name	Social Security Number	Alias	Banned
	(47404) Testersen, Test	123-04-6658	Big Red	
	(395063) testerson, baby			
	(831443) Testerson, Little			
	(831658) Testerson, Mini	646-78-9464		

Remove Last Entry

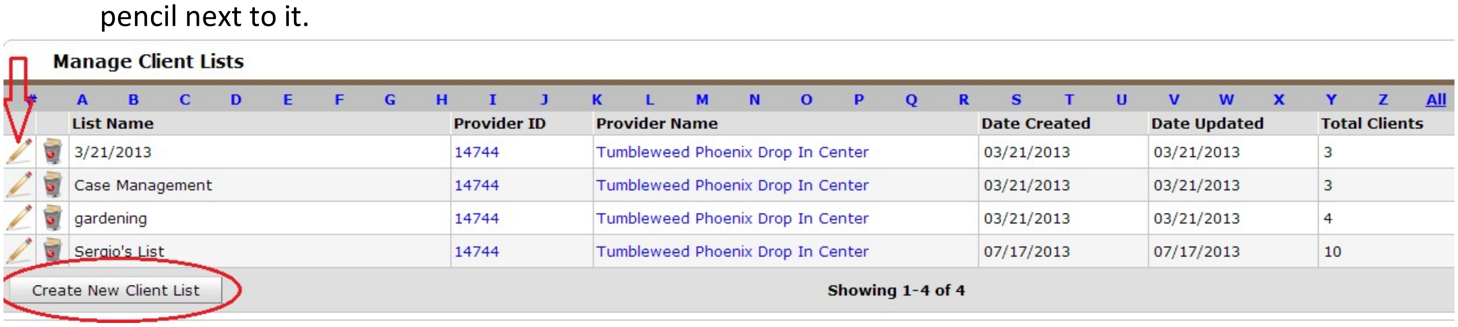
New Session Exit

Second Method:

- Adding the clients using the “Choose Clients from Client List” button. This requires you to first create a client list using the Manage Client Lists tab in Skanpoint. *(Client lists must be maintained manually)*



- Create a new list by clicking the “Create New Client List” button, or edit an existing list by clicking the pencil next to it.



Manage Client Lists

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
3/21/2013	14744	Tumbleweed Phoenix Drop In Center	03/21/2013	03/21/2013	3
Case Management	14744	Tumbleweed Phoenix Drop In Center	03/21/2013	03/21/2013	3
gardening	14744	Tumbleweed Phoenix Drop In Center	03/21/2013	03/21/2013	4
Sergio's List	14744	Tumbleweed Phoenix Drop In Center	07/17/2013	07/17/2013	10

Create New Client List

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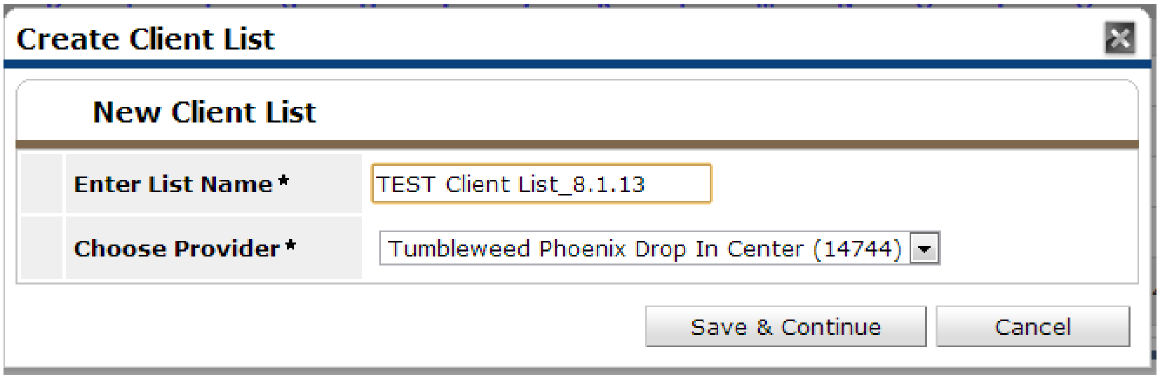
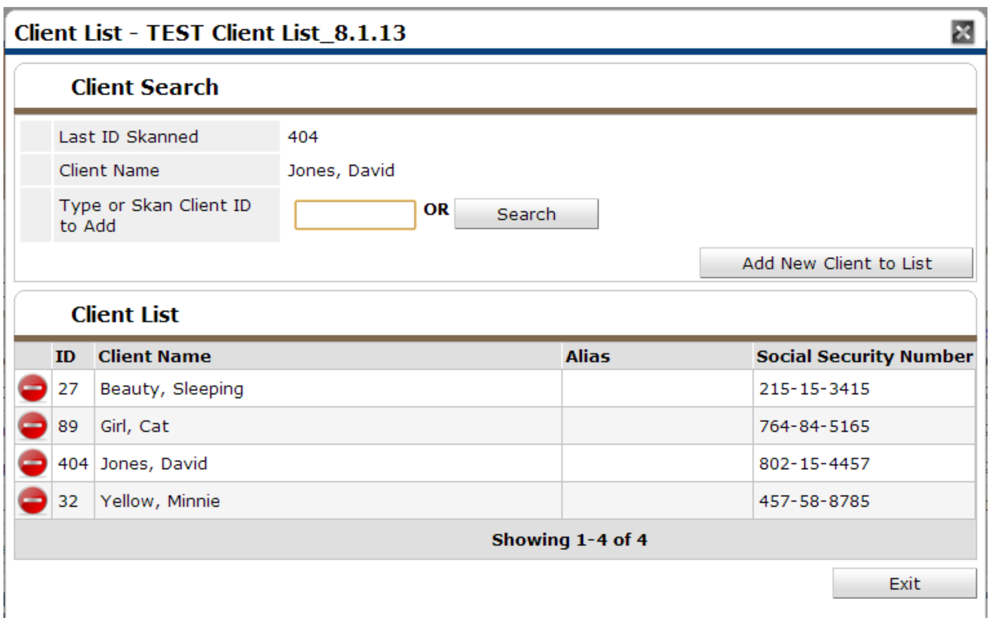
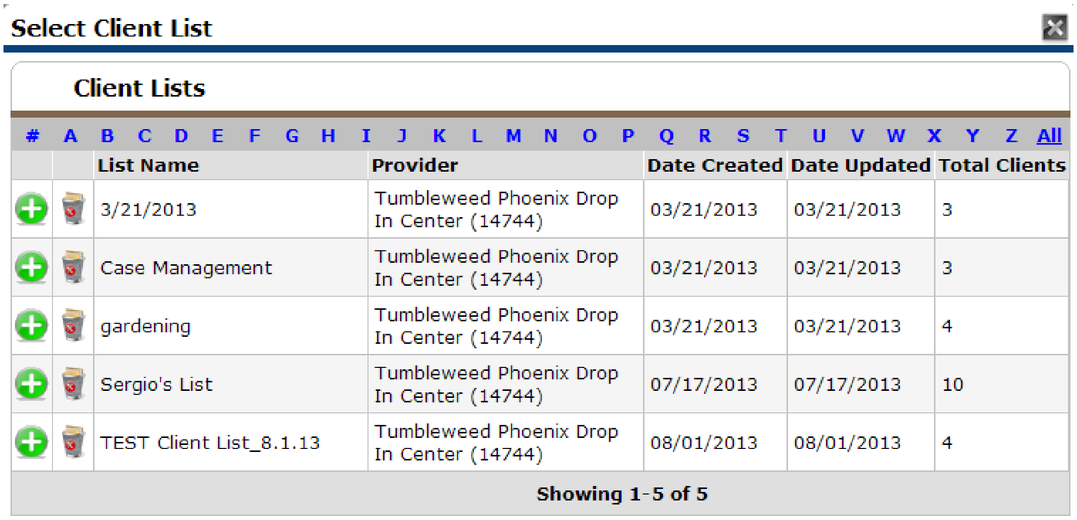
- Pop up window will prompt you to name your new client list, be specific, especially if numerous staff utilizes Client List. Click Save & Continue.



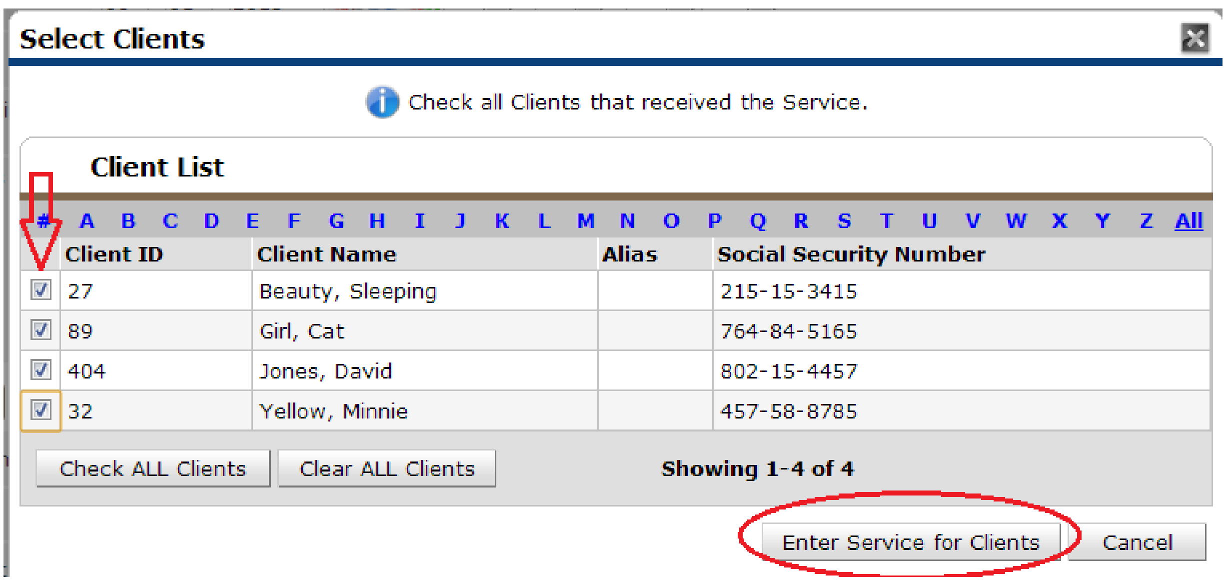
- Add clients to your list by either entering their HMIS ID number, or clicking the search button to look them up by their name. Once all your clients are populated on the client list, click the Exit button.



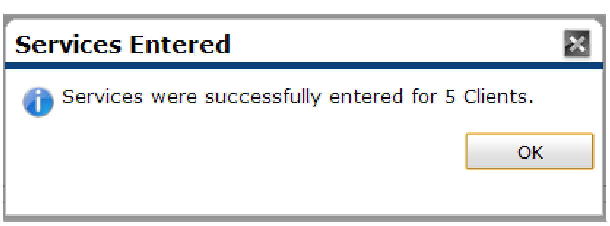
- Once a client list is created, and after recording your type of service, start and end date in Skanpoint, then click the "Choose Clients from Client List" button. Pop up will prompt you to choose which client list you want to use, select by clicking green plus sign next to the name.



- Checkmark the names of the clients that participated in the service, then click the "Enter Service for Clients" button.

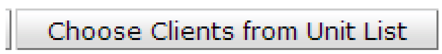


- You will receive a confirmation message, click OK to finish transaction.

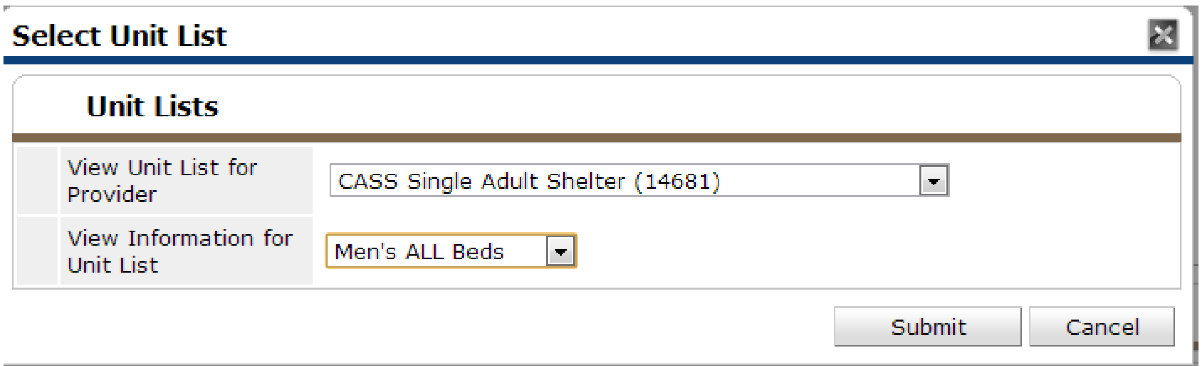


Third Method:

- If your program utilizes the Shelterpoint module, click the "choose clients from unit list" button.

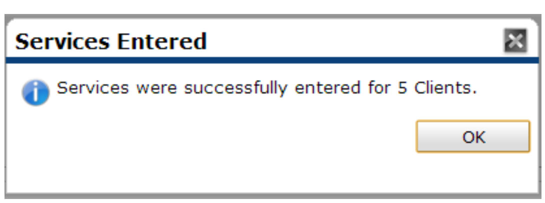


Pop up window will ask you to choose which unit list you want to use, then click submit



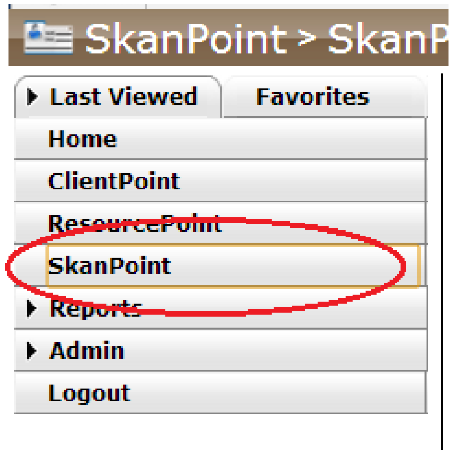
- The unit list (or bed list) for your program will pop up, check mark the names of the clients that participated in the service, then click the "Enter Service for Clients" button.

- You will receive a confirmation message, click OK to finish transaction.

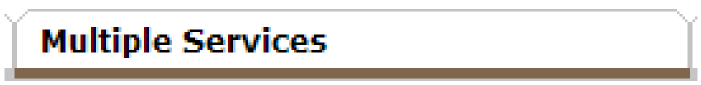


Multiple services for multiple clients

- Click on Skanpoint module.



- Click on Multiple Services tab.



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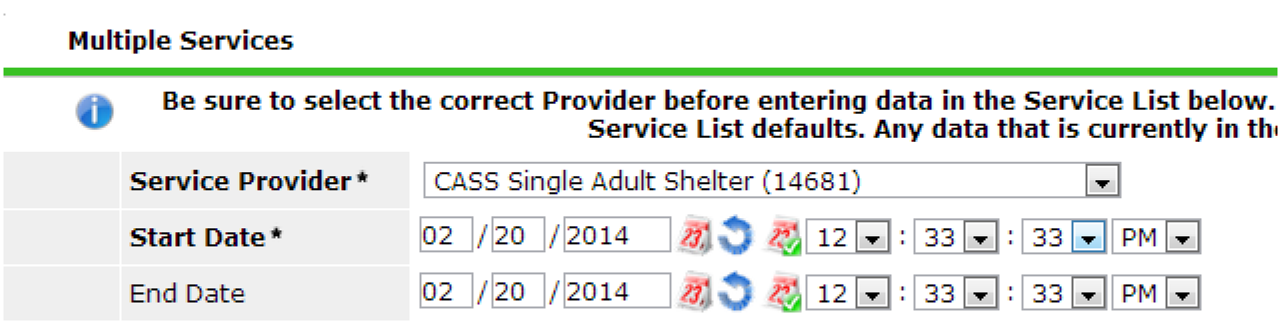
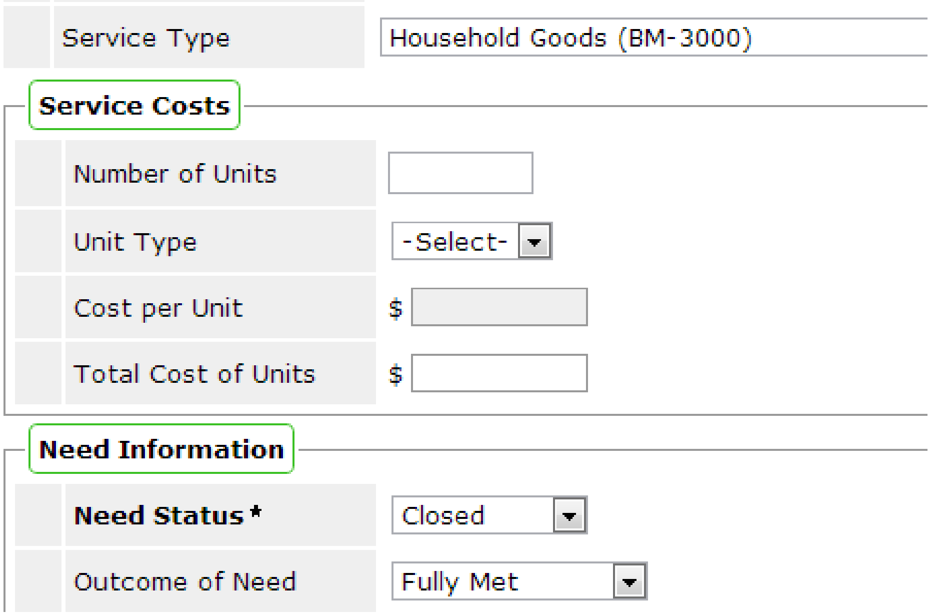


- Choose **FIRST** Service Type, Number of Units & Unit Type (if applicable), Need Status and Outcome.



- Click “Add Another” button and repeat steps above until all services rendered are documented.

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