

Case Management Training: Services

All example client names depicted herein are completely fictitious. No association with any real organization or persons is intended or should be inferred.

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

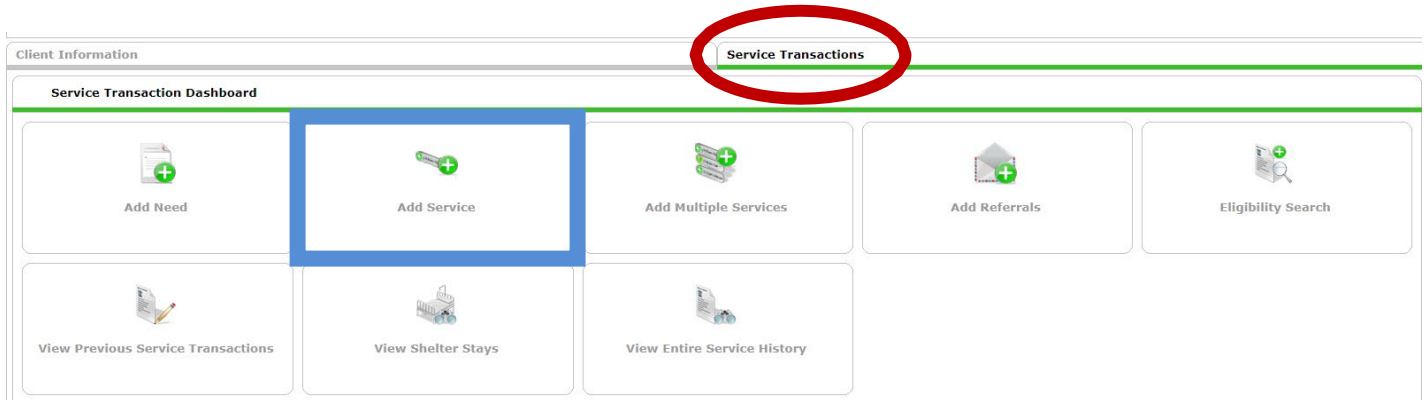
- The Service Costs, Apply Funds for Service, and Follow Up Information prompts are optional unless your agency requires them.
- The Need Information section is required. Need status should always be Closed. Outcome of Need should always be Fully Met.

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.

Add Service

▼ **Household Members**

i To include Household members for this Service,

- (15579) Single Parent with Child(ren) (HUD)**
 - (47404) Testersen, Test (Primary Client)
 - (395063) testerson, baby
 - (831443) Testerson, Little
 - (831658) Testerson, Mini

- 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.

Service Provider*	Tempe Youth Resource Center (14573) ▼
Creating User	Tricia Cano
Start Date*	07 / 31 / 2013 9 : 47 : 16 AM ▼
End Date	07 / 31 / 2013 9 : 51 : 23 AM ▼
Service Type*	Personal/Grooming Supplies (BM-6500.6500-650) ▼ <input type="button" value="Look Up"/>
Provider Specific Service	-Select- ▼

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

Number of Units	<input type="text" value="1"/>
Unit Type	Item(s) ▼

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

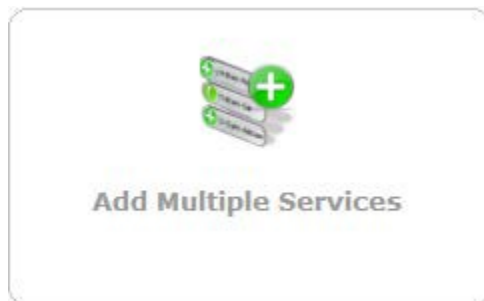
Note: Need Status should always be “Closed” and Outcome of Need should always be “Fully Met”

Need Status*	Closed ▼
Outcome of Need	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.

Add Service

Household Members

 To include Household members for this Service,








- (15579) Single Parent with Child(ren) (HUD)
- (47404) Testersen, Test (Primary Client)
- (395063) testerson, baby
- (831443) Testerson, Little
- (831658) Testerson, Mini

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




Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. Service List defaults. Any data that is currently in the

Service Provider *	CASS Single Adult Shelter (14681) 
Start Date *	02 / 20 / 2014    12 : 33 : 33 PM
End Date	02 / 20 / 2014    12 : 33 : 33 PM

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

Service Type	Household Goods (BM-3000)
Service Costs	
Number of Units	<input type="text"/>
Unit Type	-Select- 
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>
Need Information	
Need Status *	Closed 
Outcome of Need	Fully Met 

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

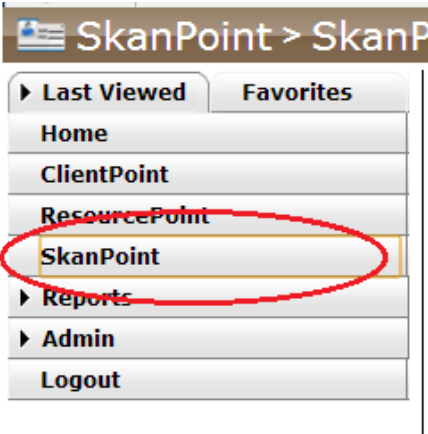
Add Another

- 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.

Service Provider*	CASS Single Adult Shelter (14681)
Service Type*	Personal Financial Counseling (DM-6500) <input type="button" value="v"/>
Start Date*	02 / 20 / 2014 12 <input type="button" value="v"/> : 44 <input type="button" value="v"/> : 27 <input type="button" value="v"/> PM <input type="button" value="v"/>
End Date	02 / 20 / 2014 12 <input type="button" value="v"/> : 45 <input type="button" value="v"/> : 48 <input type="button" value="v"/> PM <input type="button" value="v"/>
Provider Classif.	_____

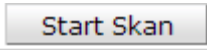
- Complete Number of Units and Unit Type (if applicable).

Number of Units	<input type="text" value="60"/>
Unit Type	<input type="text" value="Minute(s)"/> ▼

- 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.*

Skand ID Cards

▶ **Client Search** Expand to search by name

Skand Client Bar Code

Skand Code Skand 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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SkandPoint Assessment

No SkandPoint Assessment specified for this Provider

Clients Entered

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

Remove Last Entry

New Session

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 Skandpoint. (*Client lists must be maintained manually*)

Provide Service | Multiple Services | **Manage Client Lists** | Generate ID Cards

- 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

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

Showing 1-4 of 4

- Pop up window will prompt you to name your new client list, be specific, especially if numerous staff

utilizes Client List. Click Save & Continue.

Create Client List

New Client List

Enter List Name *

Choose Provider *

Save & Continue Cancel

- 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.

Client List - TEST Client List_8.1.13

Client Search

Last ID Skanned 404

Client Name Jones, David

Type or Skan Client ID to Add OR

Client List

ID	Client Name	Alias	Social Security Number
27	Beauty, Sleeping		215-15-3415
89	Girl, Cat		764-84-5165
404	Jones, David		802-15-4457
32	Yellow, Minnie		457-58-8785

Showing 1-4 of 4

- 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.

Select Client List

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		Date Created	Date Updated	Total Clients																				
		3/21/2013	Tumbleweed Phoenix Drop In Center (14744)		03/21/2013	03/21/2013	3																				
		Case Management	Tumbleweed Phoenix Drop In Center (14744)		03/21/2013	03/21/2013	3																				
		gardening	Tumbleweed Phoenix Drop In Center (14744)		03/21/2013	03/21/2013	4																				
		Sergio's List	Tumbleweed Phoenix Drop In Center (14744)		07/17/2013	07/17/2013	10																				
		TEST Client List_8.1.13	Tumbleweed Phoenix Drop In Center (14744)		08/01/2013	08/01/2013	4																				

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

Select Clients

Check all Clients that received the Service.

Client List																											
#	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
	Client ID	Client Name		Alias	Social Security Number																						
	27	Beauty, Sleeping			215-15-3415																						
	89	Girl, Cat			764-84-5165																						
	404	Jones, David			802-15-4457																						
	32	Yellow, Minnie			457-58-8785																						

Showing 1-4 of 4

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

Services Entered

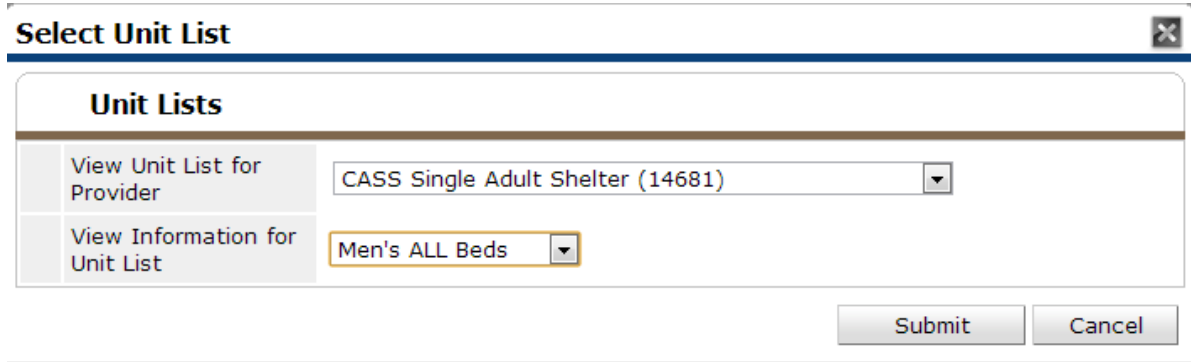
Services were successfully entered for 5 Clients.

Third Method:

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

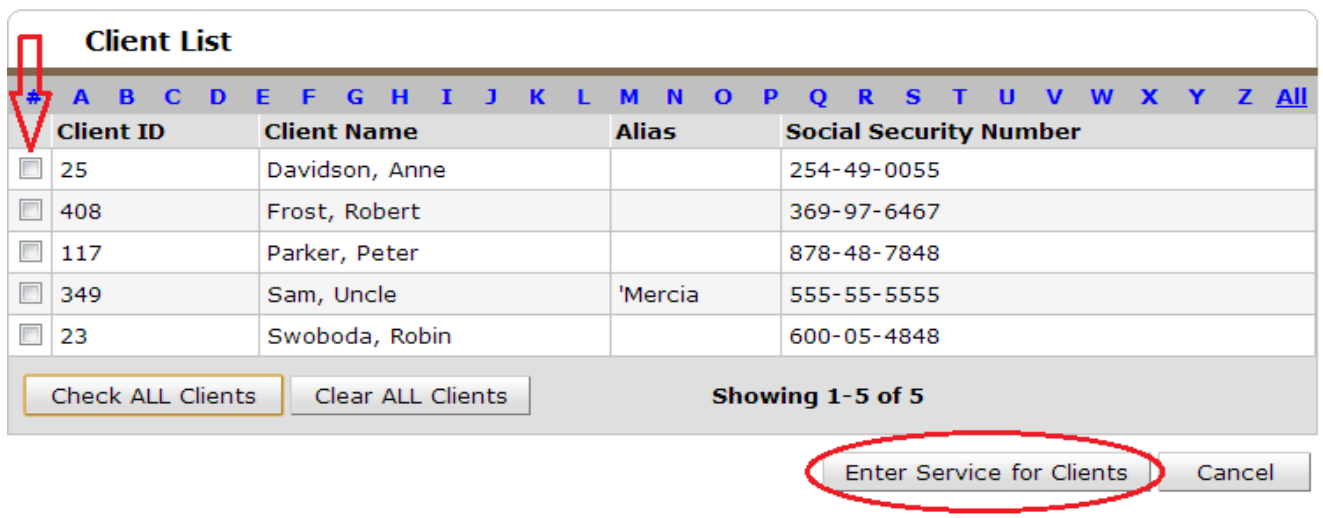
Choose Clients from Unit List

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



The dialog box titled "Select Unit List" contains two dropdown menus. The first is labeled "View Unit List for Provider" and is set to "CASS Single Adult Shelter (14681)". The second is labeled "View Information for Unit List" and is set to "Men's ALL Beds". There are "Submit" and "Cancel" buttons at the bottom right.

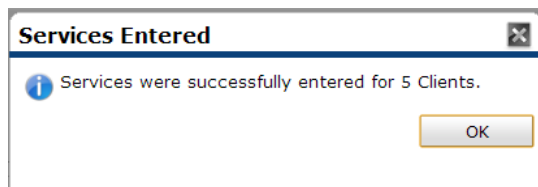
- The unit list (or bed list) for your program will pop up, check mark the names of the clients that participated in the service, then click the "Enter Service for Clients" button.



The "Client List" window shows a table with columns for Client ID, Client Name, Alias, and Social Security Number. A red arrow points to the first column header. Below the table are buttons for "Check ALL Clients", "Clear ALL Clients", and "Enter Service for Clients" (circled in red). The status "Showing 1-5 of 5" is displayed.

#	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
Client ID	Client Name	Alias	Social Security Number																								
<input type="checkbox"/>	25	Davidson, Anne		254-49-0055																							
<input type="checkbox"/>	408	Frost, Robert		369-97-6467																							
<input type="checkbox"/>	117	Parker, Peter		878-48-7848																							
<input type="checkbox"/>	349	Sam, Uncle	'Mercia	555-55-5555																							
<input type="checkbox"/>	23	Swoboda, Robin		600-05-4848																							

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



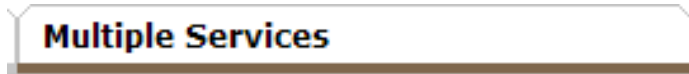
The "Services Entered" dialog box displays a message: "Services were successfully entered for 5 Clients." with an information icon. An "OK" button is located at the bottom right.

Multiple services for multiple clients

- Click on Skanpoint module.



- Click on Multiple Services tab.



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

Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. Service List defaults. Any data that is currently in the

Service Provider *	CASS Single Adult Shelter (14681) ▼
Start Date *	02 / 20 / 2014 12 ▼ : 33 ▼ : 33 ▼ PM ▼
End Date	02 / 20 / 2014 12 ▼ : 33 ▼ : 33 ▼ PM ▼

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

Service Type	Household Goods (BM-3000)
Service Costs	
Number of Units	<input type="text"/>
Unit Type	-Select- ▼
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>
Need Information	
Need Status *	Closed ▼
Outcome of Need	Fully Met ▼

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

Add Another

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