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APR

ServicePoint 5: APR Workflow and Data Quality

1. Client Profile | 2. Households | 3. ROI | 4. Add Entry | 5. Service Transactions | 6. Exit Clients | Accurate Data Easy Reports

1. Client Profile

(If backdating, enter backdate mode...see sidebar)

- ⇨ Search for Client using the shortest version of first and last name that will give you the most reasonable results (e.g. instead of Samuel search for Sam).
  - → You only need to search on name and maybe SSN.
  - → If client is found verify that all identifying data matches and proceed as if it's your own.
  - → If Client is ***not*** found type in name , SSN, DOB, SSN Data Quality, DOB Data Quality, Gender, Race and Ethnicity and Click "Add Client with this Information."

Client Visibility: If the client's name should not be shared Lock the client's record now.

2. Households

(All clients including singles must have a household)

All clients including singles must have a household.

- ⇨ Click on the "Household" tab.
- ⇨ Click on "Start New Household"
- ⇨ Complete Household Data starting with the Head of Household (HH) entering "Self" as relationship to HH.
  - → Enter all members of the household with their demographic information (*If demographic fields are not present, see your Agency Administrator*)
  - → Enter relationship to head of household in the popup.
  - → Enter the next household member or Click on "Exit"

Client Visibility: If the household member's name should not be shared Lock each client's record now.

3. ROI

(Release of Information)

- ⇨ Click on "ROI" tab.
  - → Check with your Program Director for the ROI end date.
  - → The Person who had them sign the Consent Forms is the Witness.

SERVICEpoint 5
Connecting Your Community

Favorites

When in ClientPoint, clicking the ☆ will turn into ★ and add the current client to your "Favorites" list on the navigation menu to make it easy to return to that client (not that you have favorite clients or anything).

Backdating

⇧Look Up⇧ On the upper right hand corner, under your name you should see the "back date" link. If not, please contact your agency administrator.

A client's data must be entered within 5 days of collecting their information.

If you are entering a client's data after they enter your program, it is important to backdate information to the date the client entered your program for reports to be accurate.

Client Visibility

If you don't have an ROI *or* the client has chosen not to share make sure the record is not visible. Click on the , Click on "Deny Groups" and choose "Global" Click on "Save." The will now appear next to the Client.

4. ENTRY/EXIT (ENTRY)

All clients must be entered into a Program of an Agency.

⇨ Go to the Entry/Exit Tab and Click "Add Entry/Exit"

⇨ *For Individuals:*

- *Enter Provider, Type=HUD and entry date and Click "Save and Continue."*
- *Complete the SubCook HUD-40118 Entry Entry Assessment.*

⇨ *For Families:*

- *Click household members to be included. Enter Provider, Type (HUD) and entry date and Click "Save and Continue."*
- Complete the Subcook HUD 40118 Entry Entry Assessment and Click "Save and Exit"
- Go to the Entry/Exit tab of the next household member's record and Click the *Entry* of the now visible Entry and complete the Subcook HUD 40118 Entry Assessment and Click "Save and Exit"
- Repeat for each household member.

Keys to Entry/Exits

- Provider must be a program of your agency, not the agency itself.
- Type = HUD
- The Subcook HUD-40118 Entry Assessment will appear after you have entered the Entry Date and clicked "Save and Continue."
- Follow the wonderfully informational labels that guide you through what you *have to enter* and what is optional.

CLIENT INFORMATION | 5. SERVICE TRANSACTIONS

All clients must have an Entry/Exit Entry *before* adding Service Transactions

⇨ To add a service Click on "Add Service".

- Choose appropriate household members
- Double check the default provider and change it if necessary
- Enter Start Date
- Choose the proper Service Type from the drop down.

⇨ "Status" is a required field. If service is complete, choose "Closed"

Navigating Services

- Clicking on "View Previous Service Transactions" will take you to a screen that begins with NEEDS. To see the services, click on the tab next to needs.
- Clicking on "View Entire Service History" will show you all needs and services.
- To return to the Service Transaction Dashboard, click on "Back to Dashboard" on the bottom right hand side of the tab.

DELETING*: *YOU MUST GO INTO EACH HOUSEHOLD MEMBER'S RECORD TO DELETE ENTRY/EXITS AND SERVICE TRANSACTIONS

6. ENTRY/EXIT (EXIT)

⇨ Click on the Entry/Exit tab under "Client Information"

⇨ Click on Under "Exit Date"

⇨ Complete the SubCook HUD 40118 Exit Exit Assessment and Click "Save and Exit." For Families: Be sure to check household members.

⇨ Repeat for each household member.

REQUIRED DATA BY SCREENS

	Profile Screen		Entry/Exit Entry Screen			Entry/Exit Exit Screen	
	Household Data	Subcook Shared MDR	Entry/Exit Entry Date	HUD-40118 Entry: *Part 1*	HUD-40118 Entry: *Part 2A*	Entry/Exit Exit Date	HUD-40118 Exit: *Exit Data*
HUD APR Agencies	✓	✓	✓	✓	✓	✓	✓
HPRP Programs	✓	✓	✓	✓	✓	✓	✓
Everyone	✓	✓	✓	✓		✓	

Income & Benefits

Income and non-cash benefits must be collected for each household at Entry and at Exit. For accuracy follow these guidelines:

- If you don't have the exact start date, then choose 1 day before the entry date.
- If income or benefits change, end current income (do not delete it) and enter new income with new start date.
- If end date is left empty in each income or benefit record, the APR will report this income as current or as exiting income.
- Child support is part of income. A minor's earned income is not.