



Quicklist for ServicePoint

Backdate: (Does not affect timeliness, you will be dinged for time, but it is still important to backdate.) To backdate, simply click the “backdate” link in the upper right corner of the screen. If you operate multiple programs, you want to click “Enter Data As” and choose the program that you need.

You must do a search when adding or looking for clients on the system. If there are duplicates of your client, try, and locate the D.O.B. and/or the SSN for your client. If there are duplicates with the same D.O.B. and/or SSN, choose the latest client I.D number. If you still do not see your client after these checks, then and only then do you click “add client with this data” to add your client to the database.

There are three snapshots of a client on this system: **Entry** (when they first arrive to your program), **Update/Annual Assessment** (While they are in your program and you are working with them), and then **Exit** (when they are leaving your program).

COVID Assessments: In the “Client Profile” screen, you can edit the demographics and other items, in case there were any errors while entering the client. Both the covid vaccination record and covid assessment are here, as well as the client notes and file attachment options.

To create a household: click household, fill out what type of household it is, search for the clients (or create a new one) and add them to the household. Make sure you designate who is the head of household. You can add as many people to the household as needed. If you need to go back to a household and add someone after you can select on the pencil next to the family household ID number and select manage household. You will see a black arrow next to “add family member”, click that to add the next family member.

*******DO NOT FORGET that if you need to add a new member to an assessment you must Back date to the client entry date and then select “Include Additional Members” to the Head of Household assessment and fill out that new member’s entire assessment!!**

For timeliness, Unity prefers the information be entered within 24 hours. There is no way to correct timeliness so **PLEASE** be mindful of the time frame you are adding the HMIS data into Servicepoint.

To create an Entry/Exit: Click Entry/Exit, add the client (or the household). Your type will always be HUD unless you are told otherwise. Complete the entry assessment **FOR EVERYONE** being entered the program and members included in your household. Also, every question must be answered for all household members.

LA-503 is the client location for Jefferson and Orleans Parish clients.

When filling out the income part of the assessment, make sure the drop-down is answered with “Yes” or “No”. Afterwards, find the income section by scrolling down. On the side in blue, there is an option marked “HUD verification”, click that link. Select yes for any of the types of income the client has, and no for all the others. Alternatively, you can click no at the top of the screen to mark no for every type and

then click yes for the income types the client has. **For non-cash benefits**, it is the same process, except you don't have to put in any amount.

The approximate date of homelessness needs to be the date of the client's most recent episode of homelessness. **For Example:** Client John Doe was homeless March 1st, 2015. John Doe became housed in a Rapid Rehousing Program October 8th, 2017. John Doe has been put out of the home and has been sleeping in a car since April 13th, 2020. The approximate date of homelessness should be the April 13th, 2020, date because this was the client's most recent episode of homelessness after a housing situation.

To exit a client, simply click the pencil in the exit column of your program's entry/exit section.

Interims

To do an update assessment, click the entry/exit tab, then click the interims button. Next click "add interim review". For the interim review type, select update. This will allow you to do whatever update is needed.

To do an Annual Assessment, click the entry/exit tab, then click the interims button. Next click "add interim review". For the interim review type, select annual assessment. Please remember that you are only adding ONE annual assessment a year for everyone in the household. You can make as many updates as you want. If you do the updates, your annuals will be a lot easier. Annuals are to be done for clients who have been in the program for 365 days and should be done 1 day before the year anniversary. For example, if a client was entered on Jan 2, 2018, their annual is due Jan. 1, 2019.

The **Move-In Date** is the day the client moved into housing for permanent housing programs. **MUST BE DONE IN INTERIMS AS AN UPDATE!!**

If income is being updated, it is important to end date the OLD income before adding any NEW updated income.

For reports, the report you want to run is the COC APR or COC Caper. Search for your program and enter your program's grant dates. The type will be HUD. Click the refresh button until the report is completed and select the magnifier glass to load the report and view it below. Check for data quality issues: information missing and data issues. If you click the numbers in the error columns in the report, the system will show you which clients have the problems and their client IDs.

PLEASE email hmisdept@vialink.org or call **(504) 899-6519**