# ServicePoint 5 FAQ
# Last Updated: September 11, 2012

**Question**: If a client only initials number 1 (see below) from the HMIS Client Authorization form, but does not initial numbers 2-6, then only the demographic information should be entered and not all of the other income such as income, education, past services, etc. Since these are required fields, should the user enter "Don't Know"?

Also, for the ROI in the application, should the user indicate "Yes" that a ROI was granted?

*You must initial each item below to share this information.*

1. _____My personal identifying information, such as my name, date of birth, and social security number. This information is available to authorized staff that can access the shared database in order to identify clients in their program as well as to case managers and administrators.

   The following information can be shared only among authorized staff that performs case management and/or administrative functions:

2. _____My financial information, including my income and assets, public benefits, and health insurance.

3. _____My housing and employment history, educational background, and, if applicable, incarceration history and probation status.

4. _____My behavioral health information including my mental health treatment history and any self-reported substance abuse.

5. _____My physical health information including my TB status, pregnancy status, medications, health problems, disabilities and recent hospitalizations.

6. _____Information on my past use of homeless services and contacts I have had with network members.

All network members have signed agreements to treat my information confidentially. If there is a need to share information about me with an organization not in the MCHCoC, I will be asked to sign a separate authorization form

**Response**: Reviewing this question brings up an issue with the ROI. #5 My physical health including TB is a problem. All clients should be cleared to reside in our shelters. So this information has to be checked yes, or separated out from the rest of the health questions. I am concerned about the income as that piece also reflects on the programs performance. However, if they refuse to initial, then the answer is “yes” Don’t

Know/Refused". For the ROI, the user should indicate "yes" as we do not have a "partial" choice.

**Question**: Where should I enter "notes", as ServicePoint 5 has a Client Notes section and a Case Notes section?

**Response**: All users should enter case notes, under the "Case Notes" section under "Case Plans" tab, except for Crisis Center staff. Crisis Center staff should enter their notes in Service Notes under Service Transactions.

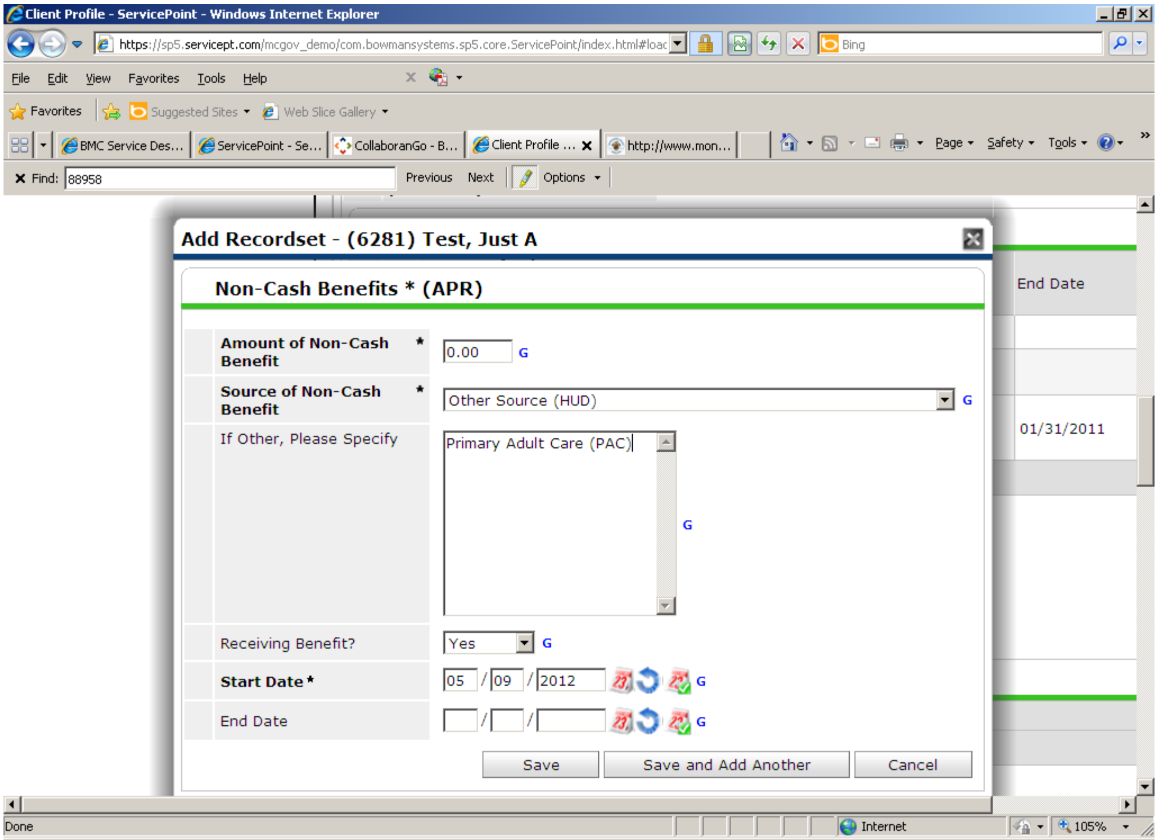
**Question**: Where should I attach files, as ServicePoint 5 has a Client Summary File Attachment section and a Case Note File Attachment section?

**Response**: Users should attach the Housing Assessment attachment under "File Attachments" section under the "Client Profile" tab. All other attachments are to be attached under "Case Plans File Attachments" section, under the "Case Plans" tab.

**Question**: For clients receiving PAC, users have been entering State Disability with an amount of $1. However, these clients are reported on the HUD CoC APR as having income. Jennifer's concern is that these clients don't have income. So the user wants to know if these clients can be entered in with a Medicaid with an amount of $1. By doing so, the clients will report as no income since Medicaid is a Non-Cash Benefit.

**Response**: For clients receiving Primary Adult Care (PAC), users have been entering State Disability with an amount of $1. However, these clients are reported on the HUD CoC APR as having income, which is inaccurate.

Please note if you have clients that receive PAC, you will need to reenter the data as a non-cash benefit. Enter $0 for the amount. Enter Other Source (HUD) as the non-cash benefit. Enter Primary Adult Care (PAC) in the "Other" notes field. See print screen below as an example:




Additionally, if PAC clients were entered in under Medicare with a $1 amount, you will need to correct this data as well. Please note that ServicePoint does accept $0 as an amount.

By entering the data as noted above, PAC clients (with no other income source) will report accurately with no income, since Medicaid is a Non-Cash Benefit.

**Question**: Where can I find the ServicePoint 5 Workflows on the HMIS Internet site?

**Response**: The direct link to ShelterPoint Workflow is http://www.montgomerycountymd.gov/content/hhs/HMIS/shelterpoint_workflow.pdf and the Client Point Workflow is http://www.montgomerycountymd.gov/content/hhs/HMIS/clientpoint_workflow.pdf.

**Question**: If I am a case worker at the Men's Emergency Shelter and my client is entering Seneca Heights Apartments (permanent housing) what do I put in housing status?

**Response** For this scenario, let's assume the client presented to the Men's Emergency Shelter from a hospital (or some other place that would meet the Literally Homeless definition). Based on the assumption, the client would be entered with “Literally Homeless” for Housing Status.

Additionally, for this scenario, let’s assume the client is being exited to Seneca Heights PLQ and not Seneca Heights Transitional. Based on the assumption and what is noted in the Destination Crosswalk (click here), the client would be exited with “Stably Housed” for Housing Status.

**Question**: And if I am a case worker at Seneca Heights Apartments and a client has moved in from the Men’s Emergency Shelter what should I put in housing status?

**Response**: For this scenario, let’s assume two things. First, the client is being exited to Seneca Heights PLQ and not Seneca Heights Transitional. Second, the client has no lapse in leaving the Men’s Emergency Shelter and entering Seneca Heights PLQ. Based on these assumptions and the Destination Crosswalk (click here), the client would already have “Stably Housed” as the Housing Status.

**Question**: In ServicePoint 4, users entered a time stamp of 12:01 AM. Should users continue to use this time stamp?

**Response**: No. According to the vendor of SerivcePoint, their Quality Assurance (QA) recommends that the default time of 12:00 AM be used for accurate capture of data.

**Question**: Can I spell check my case notes in ServicePoint 5?

**Response**: ServicePoint does not have its own spell checker. However, there is software that will allow you to spell check your notes if you are using either Mozilla Firefox or Internet Explorer. Please note use of this add-on software is strictly optional and not required to use ServicePoint. If you use Mozilla Firefox, see number 1. If you use Internet Explorer on a County workstation, see number 2. If you use Internet Explorer on a non-County workstation, see number 3.

## 1. Mozilla Firefox

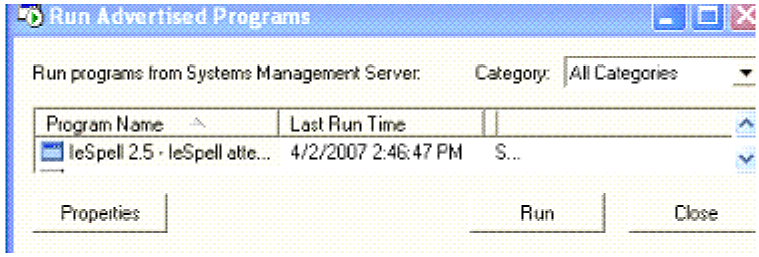
For users who ***can*** use the newest version of Mozilla FireFox 2.0 as their web browser, Bowman Systems (ServicePoint vendor) recommends it as it has an automatic spell checker in it. It can be downloaded at http://www.mozilla.com/en-US/. Please note this recommendation does not apply to ServicePoint users who use ServicePoint on County workstations, as Internet Explorer is the County's browser standard, so ***PLEASE*** do not download Mozilla to use on any County machine.

## 2. Internet Explorer (County Users on County Workstations)

For County users on County workstations, the County's Helpdesk has pushed down the internet spell checker.  If you wish to have the spell checker feature, you will need to install an add on called "IeSpell". The steps are below:

**To install IeSpell**

1. Open your **Control Panel** , **Start -> Control Panel**.
2. Double-click **Run Advertised Programs** icon.




3. In the dialog box, select **IeSpell 2.5**
4. Click **Run** button.
5. To close the dialog box, click **Close**.

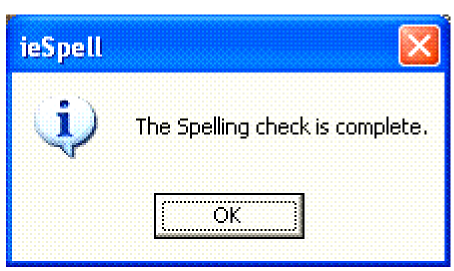
**If the "Run Advertised Programs" icon is not displayed in your Control Panel, please call the County's Help Desk at 240.777.2828. Note: Only County staff on County workstations should call this number for assistance.**

**What is IeSpell?**

IeSpell is an Internet Explorer browser add-on that spell checks text input boxes on a webpage. It will be particularly handy for users who do a lot of web-based text entry (e.g. web mails, forums). Even if the web application already includes spell check functionality, the user might still want to install this utility because it is much faster than a server-side solution. Plus they can use their personal word list which is stored locally on their system, instead of maintaining a separate word list for each application.

The add-on installs as a new button in the IE toolbar  (as well as a new menu item under "Tools")

To use IeSpell, click the ieSpell button which appears in the IE toolbar. The following dialog box will appear providing there isn't any misspelling word or the word is not in the default dictionary.




After the above dialog appears, click OK to close.

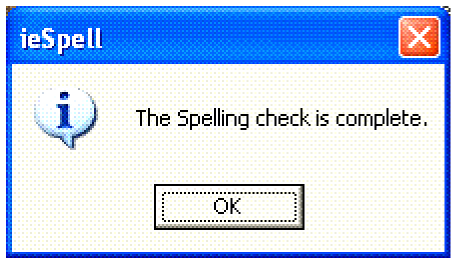
## 3. Internet Explorer (County Users on Non-County Workstations)

For users on non-county workstations, you can download the IeSpell software from http://www.iespell.com/download.php; however, please check with your IT staff first if approval is needed.

Once the IeSpell software is installed, the add-on installs as a new button in the IE toolbar 

(as well as a new menu item under "Tools")

To use IeSpell, click the ieSpell button which appears in the IE toolbar. The following dialog box will appear providing there isn't any misspelling word or the word is not in the default dictionary.




After the above dialog appears, click OK to close.

**Question**: In ServicePoint 4, if I didn't know the date of birth (DOB) of a client (even an estimated DOB), I entered 01/01/1800. However, in ServicePoint 5, if I attempt to enter this value, I get the following message: "Validation Problems: You must answer the question DOB." Why?

**Response**: According to the vendor, ServicePoint 5 rejects any birth date year prior to 1901due to the application recognizing that the client is too old to be in the system. You will now need to use a date of 01/01/1901.

**Question**: Should I enter or update income and/or disabilities data on the HUD assessment?

**Response**: No. In order to ensure accurate reporting on the Annual Performance Report (APR), all initial data entry and subsequent updates of income and/or disabilities must be done via clicking on the Entry/Exit tab. Please do not use the assessments to enter this information.

**Question**: When I run ART reports, I have noticed a new prompt: "EDA Provider." What is this, and what am I supposed to enter here?
**Response**: The EDA Provider field has to do with visibility: what items you can or cannot see on a report. Because Montgomery County is an "open" implementation of ServicePoint (where everyone can see everything), this field is not relevant. You should leave EDA Provider as "Default Provider" when you run ART reports. You do not have to enter any information in this field; it will remain as "Default Provider" when you run ART reports.

**Question**: In ServicePoint 4 (and ART 2), I was told to always use "today's date" as the "Effective Date" of my reports. Is this still correct?
**Response:** No. In ServicePoint 5 (ART 3), the "Effective Date" should be the same as the "End of Reporting Period PLUS 1 day" date. For example, if you are generating a report for May 2012, the "End of Reporting Period PLUS 1 day" would be 06/01/2012. The "Effective Date" would also be 06/01/2012".

**Question**: I am not sure what to enter for a client's case note. Are there any guidelines for what should be in a case note?
**Response**: Service Point is an electronic record, reviewed by other providers and a part of the client's permanent record. To obtain and maintain general information consistency, please consider this the standard requirement.

This general list describes what should be entered in an Electronic Case Note

**Initial Case Notes should include**:

- Household composition, income, reason for homelessness, any identified behavioral health concerns, and initial housing options.

**Updated notes should include:**

- Clear factual changes to the situation, changes income, referrals to behavioral health programs, compliance on service plan, and updates on housing options.
- Depending on the type of program, updates should occur weekly, but at least monthly.

**General Case Notes should:**

- Be readable with acceptable grammar and sentence structure;
- Describe behaviors reported by client, observed by the case manager, and identified by collateral contacts;
- Focus on the service plan, task that need to be completed and follow-up; for example, addressing housing barriers such as credit or criminal background; and
- Avoid unsubstantiated "diagnosis";
- Avoid "clichés" and jargon"
- Avoid stereotypes and prejudices;
- Avoid abbreviations