SHMIS

Connecting People, Housing & Services

DCH / SHP Grant Workflow for Data Entry to SHMIS:

1. Sign onto the website at: https://michigan.servicept.com/ using the ID and Password that is provided. Change your password immediately.
2. *SAVE your changes after you complete each page.*
3. Data entry must occur at your agency's SHP program. Naming Protocol "DCH - <your provider name> - SHP" **OR** "Agency Name – Location – SHP"
   - Agency Admin's conducting data entry and are sharing to the CoC tree:
     - You must log in using your Case Manager II license. This attaches you directly to the DCH SHP program.
   - End-Users (Case Manager II) conducting data entry (with or without sharing to the CoC tree). You will be attached directly to the DCH SHP program.
4. Click on the ClientPoint tab
   a. Type the first and last names in the search fields, and click Search
      i. Select the correct client from the search list or
      ii. Add the client if no match is found.
   b. Create a Household, if appropriate. Click the *Household Information* hyperlink, and Click "Start New Household" button.
      i. Answer questions pertaining to this household.
      ii. Click the "Start New Household button" and then continue to enter additional household members.
5. Client's ROI is entered. …YES. This allows the system to record assessment information both within the DCH funding tree and your agency within your local Continuum. If your client Record is already set to "Closed with Exceptions", you will not need to close the profile.
   - If the client refuses to have his/her name on the Statewide "pick list", secure the client record (orange security button).
   - If you are backdating information without the informed consent, secure the client record (orange security button).
   - Clicking the orange security button for the record you are working on, does not affect other household records.

6. Click the Entry/Exit button (1st Orange icon), and then “Add Entry/Exit”
    a. [Check the box(es) to include other household members in the entry.]
    b. Entry Type: HUD-401118
        - HUD-40118 Type Entry for SHP Eligible.
        - Basic or Standard Entry for clients who seek services, but <u>not</u> SHP eligible (for whatever reason).
    c. Entry Date: Change the date to reflect actual program entry.
        i. SINGLE PERSON
            1. Complete the assessment on your screen (Michigan Assessment). Be sure to fill in the Disability and the Monthly Income sub-assessments.
            2. Click “Save and Close” then click “Close”
        ii. HOUSEHOLDS
            1. Click the “Save” button
            2. Click “Add Household Data” button
            3. Check the box(es) for other household members. These questions will populate the other records that you chose.
            4. Complete the Household Sharing Assessment
            5. Click “Save”. This screen closes down and returns you the main assessment.
    d. Complete the main assessment (Michigan Assessment) for all adults in the household. Be sure to fill in the Disability and the Monthly Income sub-assessments.
        i. Click “Save” before switching.
        ii. Click the Edit Pencil to toggle to the adult record.
        iii. Complete the assessment.
        iv. Click “Save”.
    e. If children are present in the household
        i. Click the Edit Pencil to toggle to the child’s record.
        ii. Only a portion of the assessment needs to be completed for children
        iii. Complete the Red Questions (if they haven’t already been answered through the Household Sharing Assessment)
        iv. And, answer Section #2 – School Aged Children and Youth (5-17)
        v. Click “Save”.
        vi. Switch to another child’s record (if present) otherwise…
        vii. Return to the HoH record.

viii. Click “Save and Close” then click “Close”

7. Two options for Recording Services that you have Provided or Referred for:
   a. Click on the Service Transactions tab within ClientPoint
      i. Option 1: Click “Multiple Services” button to provide more than one service to your client.
         1. Be sure to complete the Status and Outcome fields.
         2. Record Costs and Sources where appropriate
            - PLEASE NOTE: the Multiple Services section is customizable by your Agency Admin.
      ii. Option 2: Click “Add/Need Services” button to record a Need and the related Service.
         1. Record Costs and Sources where appropriate
         2. Be sure to complete the Status and Outcome fields toward the bottom.
8. **Step #8 is Optional**, not required for DCH SHP reporting, but which may help meet other reporting requirements from HUD or CoC. If none indicated by your agency administrator than go to instruction #9.
   a. Complete other Assessments that you would like to collect data on, by using the Assessments tab within ClientPoint. You may have to request that assessments be made available to your agency.
      i. You can Back Date your assessment to reflect actual data collection.
      ii. Enter the Assessment Date
      iii. Click the “BackDate Mode” button
         1. Yellow bars will appear at the top and bottom of the screen
      iv. Complete the assessment(s) of your choice. BackDate Mode will keep.
      v. Data is being entered on the record you are on. If conducting data entry for Households, you may need to switch to the other record(s) by using the *Household Information* hyperlink.
      vi. Click the *Return to Live Mode* link when finished with backdating.
   b. Create Goals, Follow-Ups, and Case Notes on the Case Plans tab within ClientPoint

9. **To link data between Trees (either CoC or DCH) you must continue to Step 10. Do not log off the system!**

10. Use the ***“Click here to enter as another provider”*** function located in the blue area at the top of the screen.

- From the pop-up window, select the appropriate county & program, in which this record will be linked with (either the CoC tree or the DCH tree).
- Find the client by entering his/her ID number or name.
- Click on Release of Information and add an ROI with date, type, etc.
- Click on the Entry/Exit button and add a HUD-40118 Type Entry or Basic/Standard (or Exit when exiting the client attached to your agency)
- Record Services that you have provided (See Step #7 for instructions).
- Participant information is now linked across the CoC and DCH tree and will be automatically copied from one tree to the other.

11. Use the ***"Click here to enter as another provider"*** function to go back to your default provider.
12. Go back to step 4 to continue entering SHP participants.
13. Complete a Program Exit when necessary
    a. Click on the 1st Orange button
    b. Click on the edit pencil below the words Exit Date **(Exits need to be completed on BOTH sides of the tree!)** Use the **"*Click here*"** function
    c. Complete the first 4 questions. Do not change any of the previously populate answers on the assessment.
14. Check your HUD APR and Client Served Reports to ensure data accuracy.

For more information and/or technical assistance, contact:

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