



# **VERSION 4.06**

# **RELEASE NOTES**

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## OVERVIEW

### *ServicePoint™ – Constantly Evolving to Meet Our Customers' Needs*

*ServicePoint* is the leading client management information system in the United States. Its success is due in large part to Bowman Systems' continued collaboration with its clients. Attentiveness to clients' needs and the incorporation of user feedback are as essential to our product development as are the developers themselves. User feedback, in particular, contributes to the constantly-evolving *ServicePoint* system, allowing our software to meet the needs of our customers in an ever-changing environment.

This ever-changing environment is often a result of guidance from federal and other funding sources...

On February 17, 2009, President Obama signed the American Recovery and Reinvestment Act of 2009, which includes \$1.5 billion for a Homelessness Prevention Fund. Funding for this program, called the Homelessness Prevention and Rapid Re-Housing Program (HPRP), is being distributed based on the formula used for the Emergency Shelter Grants program.

The HMIS Data Standards Revised Draft Notice June 2009 presents proposed changes to the Homeless Management Information Systems (HMIS) Data and Technical Standards Final Notice (69 FR 146, July 30, 2004). The Draft Notice adds a new set of Program Description Data Elements and proposes revisions to Data Standards for Universal Data Elements and Program Specific Data Elements. These sections would replace Universal Data Elements and Program-Specific Data Elements of the 2004 Notice. All other sections of the 2004 notice will remain in effect.

The American Recovery and Reinvestment Act of 2009 identified HMIS as the primary tool for the collection of data on the use of funds awarded and persons served through the Homelessness Prevention and Rapid Re-Housing Program (HPRP). The Data Standards have been further modified to provide the necessary data elements and guidance to support uniform and consistent tracking of HPRP activities.

Bowman Systems *ServicePoint* 4.06 addresses the proposed changes in order to comply with suggested deadlines from HUD related to these Standards. In addition to the required HPRP data collection, the HPRP Quarterly Performance Report (QPR) and supporting reports will be available to Users via ART, the ServicePoint Advanced Reporting Tool.

## ADMINISTRATION

The 2009 Notice proposes the addition of a set of program descriptor data standards – that is, data to be collected about all homeless assistance and HPRP homelessness prevention programs in the CoC. The purpose of these new data standards is to ensure that the HMIS is the central repository for all information about homelessness in the CoC, including both programs and clients. These data elements are needed for the following HUD reports: the Annual Performance Report (APR), the Quarterly Performance Report (QPR) for HPRP funded programs, the Annual Homeless Assessment Report (AHAR) and the Housing Inventory that is submitted as part of the annual CoC application for funding.

Several updates have been made to the *Admin Providers* section when adding or editing a Provider record which complies with the Program Descriptor Data Elements in the HMIS Data Standards. Each is explained below.

### DIRECT SERVICE CODE

New “Yes” and “No” radio buttons were added to the HUD Standards section on each Provider profile. This new data element is intended to differentiate CoC Programs in the HMIS that provide direct services from organizations that do not provide direct services (such as HMIS Lead Agencies, organizations that oversee or support CoC Programs, or software solution providers). The Direct Service Code has been added so that all client-level HMIS records are linked to a specific direct service program.

This button does not currently relate to any search or view of Provider or service data either in ResourcePoint or in related public CommunityPoint websites. As this is a new data element added in 4.06, the default value has been set to “No” for all Providers. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” below.

### SITE INFORMATION

Site information data elements have been added to describe the overall program configuration and the facility where the CoC Program provides most housing and/or services (i.e. the principal program service site) within the CoC. Four new data elements have been added to the HUD Standards section on each Provider profile as listed below. Programs may choose to record the Site Information data element for each site or facility operated by the program. These elements may not be needed for Provider records which are organizational structure place holders or do not provide direct services.

#### *Program Site Configuration Type*

A new data element with accompanying picklist has been added. For the overall program, select the appropriate site configuration type from the picklist according to the following descriptions. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” below.

**Single site, single building.** Housing units (or service encounters) are at one site, in a single structure.

**Single site, multiple buildings.** Housing units (or service encounters) are at one site, in multiple structures (e.g., single apartment complex with multiple buildings and program units in two or more buildings).

**Multiple sites.** Housing units (or service encounters) are at multiple sites (e.g., scattered-site housing, outreach).

**AIRS Standards Information**

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**Shelter Information**

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**HUD Standards**

Facility Code

COC Code

Program Type Code

Direct Service Code  Yes  No

Site Information

Site Type

Housing Type

Geocode

Grantee ID

Method for Tracking Residential Program Occupancy

**Bed and Unit Inventory**

Name	Inventory Start Date	Inventory End Date	HMIS Start Date	HMIS End Date
		None.		

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**System Configurations**

**Provider - Northland Service Ministries ( Level 2 )**

**Figure 1 – HUD Standards Provider Admin screen**

## Geocode

A new textbox data element has been added to record the Geocode for a Provider. For the principal program service site, record the geocode associated with the geographic location of the site. HUD provides a list of geocodes as part of the annual CoC application process. Geocodes must be updated annually. Mobile programs (e.g., street outreach) should record the Geocode based on the location of their

administrative office. Scattered-site housing programs should record the Geocode where the majority of beds are located or where most beds are located as of the last inventory update. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

For example, the geocode for 1600 Pennsylvania Ave NW Washington DC 20502 is "38.898748,-77.037684" or "38.9024720 -77.0392870" depending on what geocode web utility used.

## Site Type

A new data element with accompanying picklist has been added. For the principal program service site, record the site type from the picklist according to the following descriptions. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

**Non-residential: services only.** The program only provides supportive services and does not provide overnight accommodations.

**Residential: special needs and non-special needs.** Residential housing (i.e., site that provides overnight accommodation) is located within a building or complex that houses both persons with special needs—e.g., homeless or formerly homeless persons, persons with substance abuse problems, persons with mental illness, or persons with HIV/AIDS—and persons without any special needs.

**Residential: special needs only.** Residential housing is located within a building or complex that houses only persons with special needs—e.g., homeless or formerly homeless persons, persons with substance abuse problems, persons with mental illness, persons with HIV/AIDS, persons with a physical disability, and/or elderly persons.

## Housing Type

A new data element with accompanying picklist has been added. Note this is a different TYPE field than already exists in Shelter Information admin section per bedlist. For the principal program service site, record the appropriate housing type from the picklist according to the following descriptions. Non-residential programs should select “Not applicable: non-residential program.” This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

**Mass shelter/barracks.** Multiple individuals and/or family households sleep in a large room with multiple beds.

**Dormitory/hotel/motel.** Most individuals and/or families share small to medium sized sleeping rooms or have private sleeping rooms. Persons may or may not share a common kitchen, common bathrooms, or both.

**Shared housing.** Most individuals and/or families reside in one or more shared housing units that house up to 8 individuals or 4 families. Each unit includes a kitchen and bath. Each family generally has a private sleeping room, though more than one individual may share sleeping space.

**Single Room Occupancy (SRO) units.** Most individuals reside in a private unit with a sleeping/living room intended for one occupant that contains no sanitary facilities or food preparation facilities, or contains either, but not both, types of facilities.

**Single apartment (non-SRO) units.** Most individuals and/or families reside in a self-contained apartment intended for one individual or family household that includes a private kitchen and bath.

**Single homes/townhouses/duplexes.** Most individuals and/or families reside in a self-contained home/townhouse/duplex intended for one individual or family household.

**Not applicable: non-residential program.** The program does not offer residential services to clients.

## PROGRAM TYPE CODE

This data element already exists in prior versions, but the picklist values were updated to be in compliance with the new Standards. To associate each CoC Program with the specific type of service offered, record the program type code from the picklist according to the following descriptions. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

**Emergency Shelter**  
**Transitional Housing**  
**Permanent Supportive Housing**  
**Homeless Outreach**  
**Homelessness Prevention and Rapid Re-Housing**  
**Services Only program**  
**Other**  
**Safe Haven**  
**Permanent Housing (e.g., Mod Rehab SRO, subsidized housing without services)**

## FIPS CODE

This data element has been deleted as specified in the Standards. All historical data will be deleted and thus not reportable.

## BED AND UNIT INVENTORY INFORMATION

A new Bed and Unit Inventory section has been added to the HUD Standards area of the Provider admin screen. Users click on the “Add Bed / Unit Inventory” button to create a new record set. The new Bed Inventory data entry screen is used to record inventory information for each residential CoC Program in order to produce Housing Inventory data for the CoC application and the AHAR. The Name, Household Type, Bed Type, Availability fields must be filled out to create a new record. The following direction is taken from the HUD Standards and is included for the purposes of clarifying procedure for recording Bed and Unit Inventory records.

Records must be established for each program depending on the combination of Household Types served, Bed Types, and Availability as described in Household Type, Bed Type, and Availability. A program that serves both households without children and households with children will have at least two Bed and Unit Inventory Information Records in order to track inventory information by household type. If a program provides different types of beds (e.g., year-round and seasonal) then a separate record is established for each bed type. For example, a program that serves single adults and has 100 beds, of which 20 are seasonal, would have two bed and unit inventory

records. One record is for the 80 facility-based year-round beds for households without children and a second record is for the 20 facility-based seasonal beds for households without children.

The bed inventory includes the total number of beds for each household type, be type, and the availability of those beds throughout the year. For example, if a program has 50 year-round facility-based beds as of October 1, 2008, the inventory record should reflect 50 year-round beds. If 50 new year-round facility-based beds are added on January 1, 2009, an end date of December 31, 2008 should be recorded and a new record should be created with a total inventory of 100 year-round facility-based beds and a start date of January 1, 2009. If a year-round program closes, the Bed and Unit Inventory Information record must be updated to show an end date equal to the last date of program operation.

If a seasonal program has a change in bed/unit inventory capacity, a new record must be established with the bed/unit inventory revised to reflect the new capacity. The start date must be the date when the new beds are available. For example, a program has 100 seasonal facility-based beds that are available January 1 through March 31, with an additional 50 seasonal facility-based beds available starting February 1 and ending March 31. The program must enter a Bed and Unit Inventory Information record showing 100 seasonal facility-based beds with the start date of January 1 and an end date of January 31. A new Bed and Unit Inventory Information record would then be entered for the program with an inventory of 150 seasonal facility-based beds, a start date of February 1, and an end date of March 31.

For HMIS participation, programs must report the total number of beds participating (or covered) in HMIS. For any residential homeless program, a bed is considered a “participating HMIS bed” if the program makes a reasonable effort to record all universal data elements on all clients served in that bed and discloses that information through agreed upon means to the HMIS Lead Agency at least once annually. If a program is only reporting data for clients staying in a portion of its beds, then only that portion of the beds must be counted as participating in HMIS. Non-contributory homeless assistance programs (see Section 1.4 for definitions) must enter “0” in the HMIS participating beds field.

Permanent supportive housing programs must also record the chronic homeless bed inventory.

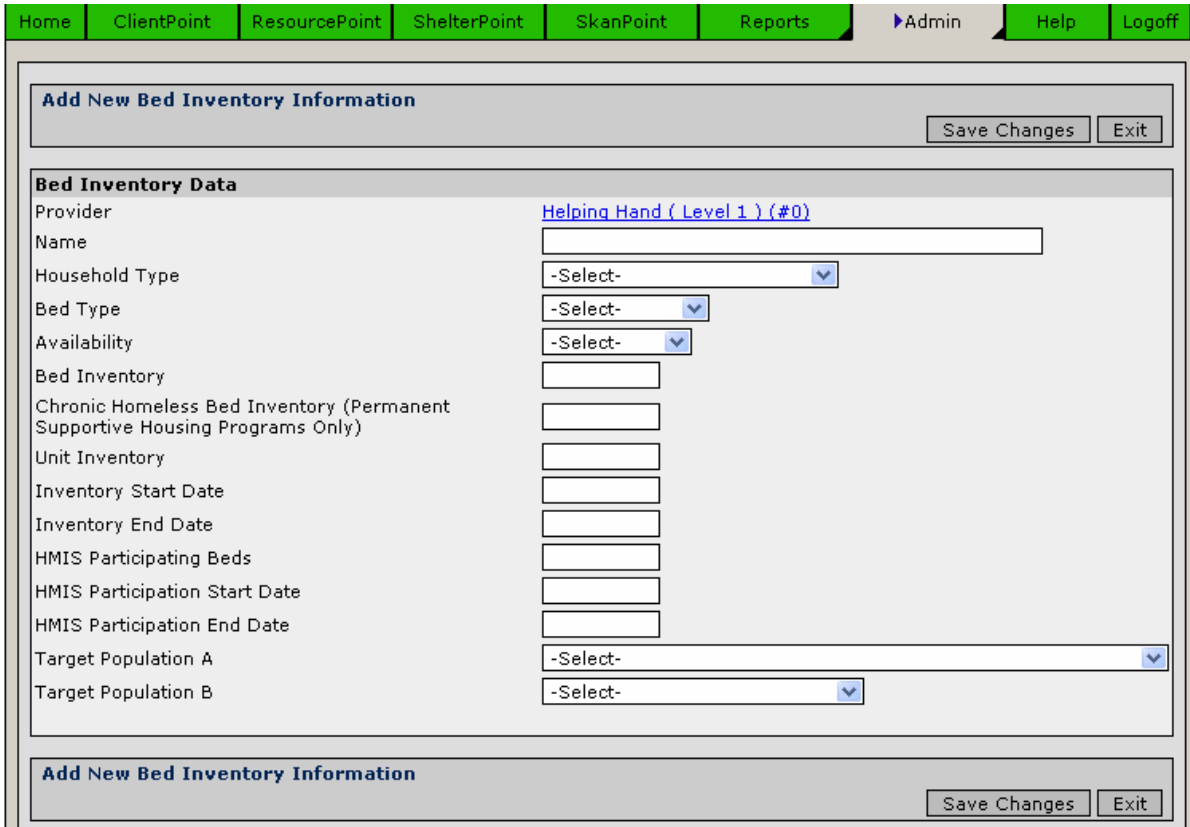
Programs may choose to create a separate Bed and Unit Inventory Information record to track inventory under development. In such instances, a projected start date for a new or expanded program may be tracked by recording the total beds and units expected along with a future start date.

## Household Type

A new data element with accompanying picklist has been added. This data element describes the household type served by beds and units counted in the Bed and Unit Inventory Information data elements. If some or all beds and units are not designated exclusively for a particular type of household, then record the household type most frequently served by the associated beds and units. For purposes of this data element, persons 18 and over are considered adults and persons under 18 are children. Record the household type for the associated beds and units from the picklist according to the following descriptions. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” below.

**Households without children.** Beds and units are intended for households with adults only. This includes households composed of unaccompanied adults and multiple adults.

**Households with children.** Beds and units are intended for households with (at least) one adult and one child, or households with an unaccompanied youth only, or households with multiple children only (e.g., juvenile parent and child).



The screenshot displays the 'Add New Bed Inventory Information' form. At the top, there is a navigation bar with buttons for Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, Help, and Logoff. The form title is 'Add New Bed Inventory Information' and it includes 'Save Changes' and 'Exit' buttons. The form fields are as follows:

Provider	Helping Hand ( Level 1 ) (#0)
Name	<input type="text"/>
Household Type	-Select-
Bed Type	-Select-
Availability	-Select-
Bed Inventory	<input type="text"/>
Chronic Homeless Bed Inventory (Permanent Supportive Housing Programs Only)	<input type="text"/>
Unit Inventory	<input type="text"/>
Inventory Start Date	<input type="text"/>
Inventory End Date	<input type="text"/>
HMIS Participating Beds	<input type="text"/>
HMIS Participation Start Date	<input type="text"/>
HMIS Participation End Date	<input type="text"/>
Target Population A	-Select-
Target Population B	-Select-

**Figure 2 – Bed and Unit Inventory screen**

## Bed Type

A new data element with accompanying picklist has been added. The Bed Type describes the type of program beds based on whether beds are: located in a residential homeless assistance program facility (including cots or mats); provided through a voucher with a hotel or motel; other types of beds. Record the bed type from the picklist according to the following descriptions. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above.

**Facility-based.** Beds (including cots or mats) are located in a residential homeless assistance facility dedicated for use by persons who are homeless.

**Voucher.** Beds are located in a hotel or motel and made available by the homeless assistance program through vouchers or other forms of payment.

**Other.** Beds are located in a campground, church, or other facility not dedicated for use by persons who are homeless.

## **Availability**

A new data element with accompanying picklist has been added. The new data element describes the availability of beds based on whether beds are available on a planned basis year-round or seasonally (during a defined period of high demand), or on an ad hoc or temporary basis as demand indicates. Record the availability from the picklist according to the following descriptions. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above.

**Year-round.** Beds are available on a year-round basis.

**Seasonal** (Emergency Shelters Only). Beds/units are available on a planned basis, with set start and end dates, during an anticipated period of higher demand.

**Overflow** (Emergency Shelters Only). Beds/units are available on an ad hoc or temporary basis during the year in response to demand that exceeds planned (year round or seasonal) bed capacity.

## **Bed Inventory**

A new integer data element has been added to record the Bed Inventory for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

The bed inventory data element is an integer that tracks the total number of beds available for occupancy as of the inventory start date (see Inventory Start Date). Programs that serve a mixed population without a fixed number of beds per household type should divide the beds based on average utilization. For example, a program has 100 beds that could be used by either households without children or households with children. If one-half of the households are without children on an average night, then the program enters two separate Bed and Inventory Records for the 50 beds for households without children and for the 50 beds for households with children. Programs that only have units (no fixed number of beds) can use a multiplier factor to estimate the number of beds (e.g., a program with 30 family units and an average family size of 3 = 90 beds).

## **Chronic Homeless Bed Inventory (Permanent Supportive Housing Programs Only)**

A new integer data element has been added to record the Chronic Homeless Bed Inventory for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

The chronic homeless bed inventory data element is an integer that tracks the total number of beds available for occupancy for chronically homeless persons as of the inventory start date. The number of beds for chronically homeless persons is a subset of the total permanent supportive housing bed inventory for a given program and must be equal to or less than the total bed inventory.

## ***Unit Inventory***

A new integer data element has been added to record the Unit Inventory for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

The unit inventory data element is an integer that tracks the total number of units available for occupancy as of the inventory start date. Programs that do not have a fixed number of units (e.g., a congregate shelter program) may record the bed inventory, the number of residential facilities operated by the program, or the number of rooms used for overnight accommodation as the unit integer.

## ***Inventory Start Date***

A new date type data element has been added to record the Inventory Start Date for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

The inventory start date is the date when the bed and unit inventory information first applies. This may represent the date when a change in household type, bed type, availability, bed inventory or unit inventory occurs for a given program.

## ***Inventory End Date***

A new date type data element has been added to record the Inventory End Date for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

The inventory end date is the date when the Bed and Unit Inventory Information as recorded is no longer applicable. This may be due to a change in household type, bed type, availability, bed inventory or unit inventory. For seasonal beds, this should reflect the projected end date for the seasonal bed inventory.

## ***HMIS Participating Beds***

A new integer data element has been added to record the HMIS Participating Beds for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

This data element is an integer that tracks the total number of beds participating in HMIS as of the HMIS participation start date. For programs that serve a mixed population without a fixed number of beds per household type, record participating beds according to instructions related to the Bed Inventory.

## ***HMIS Participation Start Date***

A new date type data element has been added to record the HMIS Participation Start Date for a Provider. This new data element can be seen in “Figure 2 – Bed and Unit Inventory screen” above. The following direction is provided in the HUD Standards.

This is the date when the HMIS participating bed information first applies (i.e., the date when a change in the number of HMIS participating beds occurs for a program's Bed and Unit Inventory Record).

### **HMIS Participation End Date**

A new date type data element has been added to record the HMIS Participation End Date for a Provider. This new data element can be seen in "Figure 2 – Bed and Unit Inventory screen" above. The following direction is provided in the HUD Standards.

The HMIS participation end date is the date when the HMIS Participation Information record is no longer applicable (i.e., the last date when the number of HMIS participating beds is applicable for a program's Bed and Unit Inventory Record).

### **Target Population A**

A new data element with accompanying picklist has been added. Record the appropriate Target Population A served by the program from the picklist according to the following descriptions. This new data element can be seen in "Figure 2 – Bed and Unit Inventory screen" above. This information is denoted as "optional" and may be used to track bed utilization and service gaps.

**SM: Single Males (18 years and older)**

**SF: Single Females (18 years and older)**

**SMF: Single Males and Females (18 years and older)**

**CO: Couples Only, No Children**

**SM+HC: Single Males and Households with Children**

**SF+HC: Single Females and Households with Children**

**HC: Households with Children**

**YM: Unaccompanied Young Males (under 18)**

**YF: Unaccompanied Young Females (under 18)**

**YMF: Unaccompanied Young Males and Females (under 18)**

**SMF+HC: Single Male and Female and Households with Children**

### **Target Population B**

A new data element with accompanying picklist has been added. Record the appropriate Target Population B served by the program from the picklist according to the following descriptions. Select only one response. If a residential homeless assistance program does not target one of these populations, select "NA: Not Applicable." This new data element can be seen in "Figure 2 – Bed and Unit Inventory screen" above. This information is denoted as "optional" and may be used to track bed utilization and service gaps.

**DV: Domestic Violence victims.** The program targets persons who have experienced domestic violence.

**VET: Veterans.** The program targets veterans.

**HIV: Persons with HIV/AIDS.** The program targets persons with HIV/AIDS.

**NA: Not Applicable.** The program does not target domestic violence victims, veterans, or persons with HIV/AIDS.

## **METHOD FOR TRACKING RESIDENTIAL PROGRAM OCCUPANCY**

A new data element with accompanying picklist has been added to the HUD Standards area of the Provider admin screen. Record the appropriate Method for Tracking Residential Program Occupancy from the picklist according to the following descriptions. Select only one response. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

**Program Entry and Exit Date Comparison**  
**Bed Management Model**  
**Service Transaction Model**

The following direction is provided in the HUD Standards.

Record the method used to track the actual nights that a client stays in a program. The standard method for residential homeless assistance programs that complete APRs must be based on a comparison of program entry and exit dates. A residential program that is not required to produce an APR may alternatively use a bed management tool or service transaction approach to report the number of persons receiving shelter/housing on a particular night.

Additional information listed in the Standards.

## **GRANTEE ID**

A new integer data element has been added to the HUD Standards area of the Provider admin screen. Record the appropriate Grantee Identifier (ID) to uniquely identify HPRP grantees and subgrantees that receive funding under the American Recovery and Reinvestment Act of 2009. HPRP state and local government grantees may select one or more organizations (called “subgrantees”) to administer HPRP-funded programs. All subgrantees of a federal HPRP grantee must identify their projects with the original state or local grantee identifier as assigned by HUD. This new data element can be seen in “Figure 1 – HUD Standards Provider Admin” above.

## **CLIENTPOINT**

Universal Data Elements are recorded in ClientPoint via the Client record, Assessment, and sub-Assessment data fields. The universal data elements establish the baseline data collection requirements for all Contributory CoC Programs. The universal data standards are the basis for producing unduplicated estimates of the number of homeless people accessing services from homeless assistance providers, basic demographic characteristics of people who are homeless, and patterns of service use, including information on shelter stays and homelessness episodes over time.

The 2009 Notice specifies the modification of many universal data elements. Each is explained below. In addition, the following direction is provided in the HUD Standards.

All universal data elements must be obtained from each adult and unaccompanied youth who applies for a homeless assistance service, with the exception of Veteran Status. Most universal

data elements are also required for children under 18 years of age. Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 can be provided by the household head who is applying for services. The children do not need to be present at the time the household head applies for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the program on the same day as the household head. Information for these children should be recorded when the children join the program. Information on any other adults (18 years of age or older) who are applying for services as part of the household will be obtained directly from that adult. Generally, one adult should not provide information for another adult.

## NAME

The existing middle initial field *MI* was updated to allow a full middle name to be collected. Initials recorded will still be displayed in this newly expanded field. Users have the option to update the existing initial with full name as clients information is updated or recorded.


The full middle name is not currently used as a part of the client search query, but is displayed in full on the possible matches results screen.

## DATE OF BIRTH TYPE

A new Date of Birth Type data element has been added to the ClientPoint search screen. When a new client record is added, a User may enter the appropriate date of birth type from the picklist values defined below to accompany the date of birth entered.


- Full DOB Reported**
- Approximate or Partial DOB Reported**
- Don't Know**
- Refused**


Note: This new element **MUST** be added manually to any existing assessment where the date of birth is collected if this new quality data is to be editable for existing clients or new clients once created. The date of birth type answer is visible below the Age on the Client Profile screen, but can only be edited is placed manually in an assessment as demonstrated in the “Figure 3 – DOB Type” below.

**Client Profile** 

**Card Orientation:** 1 ▼
Issue ID Card
Save Changes
Exit

Added to System Mar 6 2003 12:06AM  
 First  MI  Last  Suffix   
 SS#  -  -   
 SSN Data Quality Full SSN Reported (HUD) ▼  
 Age 54  
 Date of Birth Type Full DOB Reported

**Household Data Sharing** 

**Demographics** 

<b>Assessment Date</b>	<input type="text" value="08/06/2009"/>	<input type="text" value="11"/>	<input type="text" value="04"/>	<input type="text" value="PM"/>	<input type="button" value="Back Date"/>
Date of Birth	<input type="text" value="12/20/1954"/> (mm/dd/yyyy) H G				
Date of Birth Type	<span style="border: 1px solid gray; padding: 0 5px;">Full DOB Reported ▼</span> H G				
Primary Race	<span style="border: 1px solid gray; padding: 0 5px;">White (HUD) ▼</span> H G				
Secondary Race	<span style="border: 1px solid gray; padding: 0 5px;">Black or African American (HUD) ▼</span> H G				

**Figure 3 – DOB Type**

## RACE

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this universal data element.

## ETHNICITY

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this universal data element.

## GENDER

It was the consensus of Bowman’s HPRP Workgroup, convened for the purpose of validating decisions made regarding Standards compliance, that no change or update be made to this data element in 4.06. It is anticipated that this data element will be altered again once the regular Standards released for 60-day public comment is finalized. Thus no changes will be made to any existing 4.05 gender picklist via the 4.06 upgrade.

## RESIDENCE PRIOR TO PROGRAM ENTRY

Question code "TYPEOFLIVINGSITUATION" typically has an assessment question label "Prior Living Situation." This question is used to identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission for all adults and unaccompanied youth served. Response revisions and changes have been applied to existing picklist as the Standard directs.

Record the appropriate type of residence from the picklist values as defined below.

**Emergency shelter, including hotel or motel paid for with emergency shelter voucher**  
**Transitional housing for homeless persons (including homeless youth)**  
**Permanent housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)**  
**Psychiatric hospital or other psychiatric facility**  
**Substance abuse treatment facility or detox center**  
**Hospital (non-psychiatric)**  
**Jail, prison or juvenile detention facility**  
**Rental by client, no housing subsidy**  
**Owned by client, no housing subsidy**  
**Staying or living in a family member's room, apartment or house**  
**Staying or living in a friend's room, apartment or house**  
**Hotel or motel paid for without emergency shelter voucher**  
**Foster care home or foster care group home**  
**Place not meant for habitation inclusive of "non-housing service site (outreach programs only)"**  
**Other**  
**Safe Haven**  
**Rental by client, with VASH housing subsidy**  
**Rental by client, with other (non-VASH) housing subsidy**  
**Owned by client, with housing subsidy:**  
**Don't Know**  
**Refused**

### ***Length of Stay in Previous Place***

New values of "Don't Know" and "Refused" have been added to the existing picklist associated with this universal data element.

### **ZIP CODE TYPE**

Revised existing picklist response value from "Full Zip Code Recorded" to "Full or Partial Zip Code Reported" as specified in the Standards.

### **HOUSING STATUS**

A new data element with accompanying picklist has been added as a new assessment question. Record the appropriate Housing Status from the picklist according to the following descriptions.

**Literally homeless**  
**Housed and at imminent risk of losing housing**  
**Housed and at-risk of losing housing**  
**Stably housed**  
**Don't Know**  
**Refused**

The following direction is provided in the HUD Standards.

This element is intended to identify persons who, at program entry and program exit, are literally homeless; housed, but at imminent risk of losing their housing; housed, but at-risk of losing their housing; or in a stable housing situation. This data element allows programs that serve homeless and non-homeless persons to separate these two populations for reporting purposes. This data element is not intended to be used for program eligibility determination purposes, as program eligibility criteria may vary by program and/or funding source. This information can help homelessness prevention programs target their resources appropriately.

Note: This element has been added to a “HPRP” assessment available with the 4.06 upgrade, but this question will need to be manually added to any other assessment where this data collection is desired.

## **INCOME AND SOURCES**

### ***Income received from any source in past 30 days?***





A new data element with accompanying picklist has been added as a new assessment question. This question has been automatically added to any current assessment which includes the Monthly Income sub-assessment. A User is to record the appropriate response to the question “Income received from any source in the past 30 days?” from the picklist according to the following descriptions. This new data element can be seen in “Figure 4 – Income and Non-Cash Benefits” below.

**No**  
**Yes**  
**Don’t Know**  
**Refused**

If the answer recorded is *Yes*, then the User should also record at least one source of income via the *Add* button on the Monthly Income sub-assessment window. If the answer recorded is *No*, *Don’t Know*, or *Refused*, then the User is not expected to record any income sources via the Monthly Income sub-assessment

Procedure should be to ask about ALL sources of income during Client intake or assessment, but to only record those income sources received, if any, to ease the data entry burden.



Client ID: 4405		Monthly Income 		Save & Add Another	Save & Exit	Exit
<b>Assessment Date</b>		08/07/2009 01:57 AM				
Last 30 Day Income	100.00	H G				
Source of Income	Earned Income (HUD) 					H G
Receiving Income Source?	Yes 					H G
If Other, Please specify						H G
Start Date	08/07/2009	(mm/dd/yyyy) H G				
End Date	08/09/2009	(mm/dd/yyyy) H G				
Client Name: Johnson, Sammy		Client ID: 4405		Monthly Income 		
				Save & Add Another	Save & Exit	Exit

**Figure 5 – Monthly Income Sub-Assessment**

## Total Monthly Income

The Total Monthly Income file already existed in 4.05 and remains a field for manually recording the total monthly income. This existing data element can be seen in “Figure 4 – Income and Non-Cash Benefits” above.

A new calculated field for Current Monthly Income and Gross Annual Income has been added as an optional display on the bottom of the Monthly Income sub-assessment window. This feature can be turned on for the entire system via the Admin System Preferences screen by clicking the box which corresponds to the label “Calculate Gross Annual Income for Each Client.” This new calculated display can be seen in “Figure 4 – Income and Non-Cash Benefits” above. The Calculate Gross Annual Income for Each Client system preference setting can be seen in “Figure 6 – Calculated Income system setting” below.

Calculate Gross Annual Income for Each Client	<input checked="" type="checkbox"/>
---	-------------------------------------

**Figure 6 - Calculated Income system setting**

## NON-CASH BENEFITS

A new Non-Cash Benefits sub-assessment has been automatically created in the 4.06 upgrade. Historically, this data was collected in the Monthly Income sub-assessment. All historical non-cash benefit data has been migrated to this new sub-assessment question. Note that any picklist value which is not a HUD defined non-cash source will be left in the Income sub-assessment and related picklist. The following picklist values are acceptable HUD non-cash benefit definitions.

- Supplemental Nutrition Assistance Program (SNAP) (Previously known as Food Stamps)**
- MEDICAID health insurance program (or use local name)**
- MEDICARE health insurance program (or use local name)**
- State Children’s Health Insurance Program (or use local name)**
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)**
- Veteran’s Administration (VA) Medical Services**
- TANF Child Care services (or use local name)**
- TANF transportation services (or use local name)**
- Other TANF-funded services (or use local name)**
- Section 8, public housing, or other rental assistance**
- Other source**

### ***Non-cash benefit received from any source in past 30 days?***

A new data element with accompanying picklist has been added as a new assessment question. This question has been automatically added to any current assessment which includes the Monthly Income sub-assessment. A User is to record the appropriate response to the question “Non-cash benefit received from any source in past 30 days?” from the picklist according to the following descriptions. This new data element can be seen in “Figure 4 – Income and Non-Cash Benefits” above.


- Yes**
- No**
- Don’t Know**
- Refused**

If the answer recorded is *Yes*, then the User should also record at least one source of non-cash benefit via the *Add* button on the Non-Cash Benefits sub-assessment window. If the answer recorded is *No*, *Don’t Know*, or *Refused*, then the User is not expected to record any non-cash benefit sources.

Procedure should be to ask about ALL non-cash benefit sources during Client intake or assessment, but to only record those non-cash benefits received, if any, to ease the data entry burden.

### ***Receiving Benefit?***


A new Yes/No data element has been added as a new Non-Cash Benefits sub-assessment question. This question has been automatically added to the Non-Cash Benefits sub-assessment. When a new benefit record is created, the Receiving Benefit value will be defaulted to “Yes.” Historical answers will not have any value applied as this question is not currently being used for any Bowman-designed reports. This new data element can be seen in “Figure 7 – Non-Cash Benefits Sub-Assessment” below.

**Non-Cash Benefits** 


Save & Add Another Save & Exit Exit

**Assessment Date** 08/07/2009 03:52 AM

Amount of Non-Cash Benefit  H G


Source of Non-Cash Benefit MEDICAID (HUD)  H G

If Other, Please Specify  H G

Receiving Benefit? Yes  H G

Start Date 08/07/2009 (mm/dd/yyyy) H G

End Date  (mm/dd/yyyy) H G

**Client Name: Johnson, Sammy**  
**Client ID: 4405**  
**Non-Cash Benefits** 

Save & Add Another Save & Exit Exit

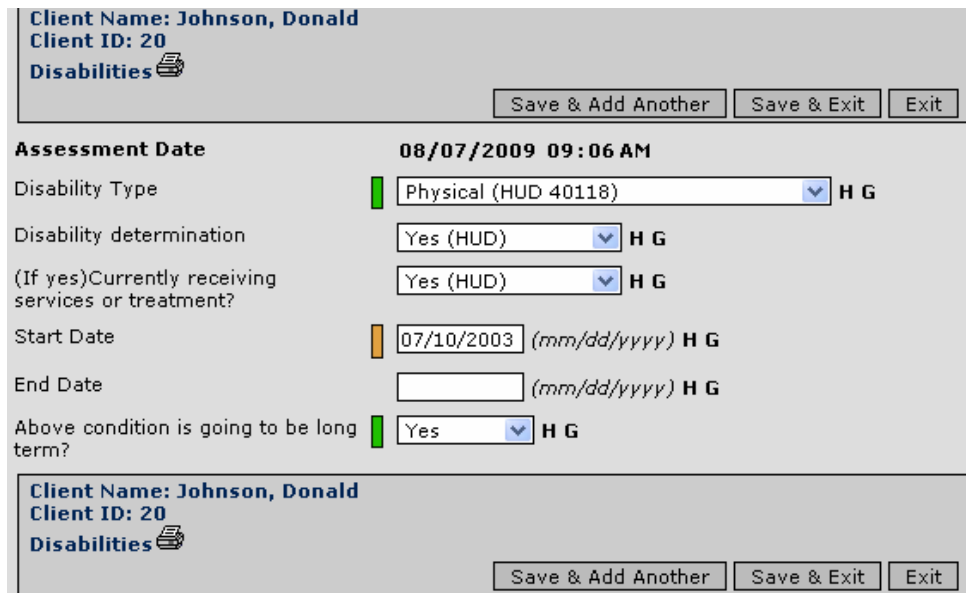
**Figure 7 – Non-Cash Benefits Sub-Assessment**

## PHYSICAL DISABILITY

Disabilities are currently entered via the "DISABILITIES\_1" sub-assessment. The current "Physical / Mobility Limits" Disability picklist value has been converted to read just "Physical."

### Disability Determination

A new data element has been added to the "DISABILITIES\_1" sub-assessment called "Disability determination" with a related picklist of Yes, No, Don't Know, Refused. This question has been automatically added to the current Disability sub-assessment. This new data element can be seen in "Figure 8 – Disability Sub-Assessment" below.



Client Name: Johnson, Donald  
Client ID: 20  
Disabilities

Save & Add Another Save & Exit Exit

Assessment Date 08/07/2009 09:06 AM

Disability Type Physical (HUD 40118) H G

Disability determination Yes (HUD) H G

(If yes)Currently receiving services or treatment? Yes (HUD) H G

Start Date 07/10/2003 (mm/dd/yyyy) H G

End Date (mm/dd/yyyy) H G

Above condition is going to be long term? Yes H G

Client Name: Johnson, Donald  
Client ID: 20  
Disabilities

Save & Add Another Save & Exit Exit

Figure 8 – Disability Sub-Assessment

### (If yes)Currently receiving services or treatment?

A new data element has been added to the "DISABILITIES\_1" sub-assessment called "(If yes)Currently receiving services or treatment?" with a related picklist of Yes, No, Don't Know, Refused. This question has been automatically added to the current Disability sub-assessment. This new data element can be seen in "Figure 8 – Disability Sub-Assessment" above.

## DEVELOPMENTAL DISABILITY

The new elements "Disability determination" and "(If yes)Currently receiving services or treatment?" are to be used for recording the appropriate data for developmental disability.

## CHRONIC HEALTH CONDITION

A new value of "Chronic Health Condition" has been added to the Disability Type picklist located in the "DISABILITIES\_1" sub-assessment.

The new elements "Disability determination" and "(If yes)Currently receiving services or treatment?" are to be used for recording the appropriate data for chronic health condition.

## HIV/AIDS

The new elements "Disability determination" and "(If yes)Currently receiving services or treatment?" are to be used for recording the appropriate data for HIV / AIDS.

## MENTAL HEALTH

The new elements "Disability determination" and "(If yes)Currently receiving services or treatment?" are to be used for recording the appropriate data for mental health.

## SUBSTANCE ABUSE

A new value of "Substance abuse problem" has been added to the Disability Type picklist located in the "DISABILITIES\_1" sub-assessment.

Although HUD's direction was for the substance abuse data element "dually diagnosed" response category to be changed to "Both alcohol and drug abuse," it was determined that this not be converted as many interpret dually diagnosed as relating to a mental health condition paired with alcohol or drug abuse.

The new elements "Disability determination" and "(If yes)Currently receiving services or treatment?" are to be used for recording the appropriate data for substance abuse.

## DOMESTIC VIOLENCE

New values of "Don't Know" and "Refused" have been added to the existing picklist associated with this program-specific data element.

## DATE OF CONTACT

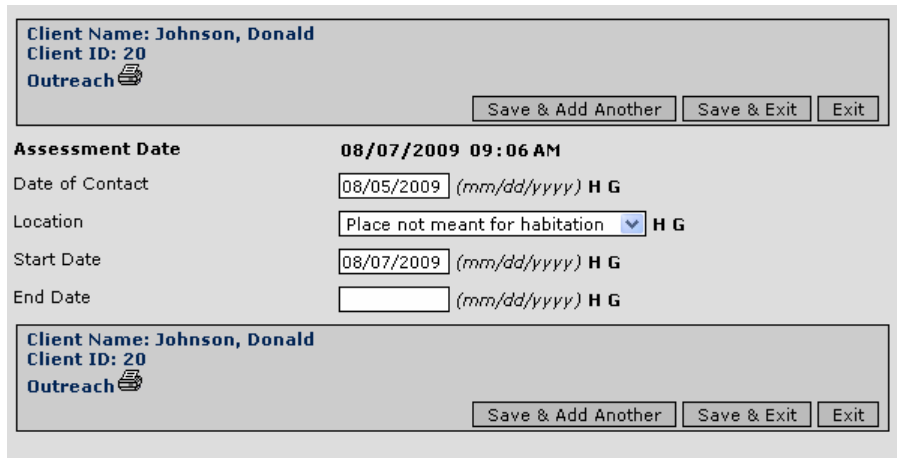
A New "OUTREACH" Sub-assessment was created and includes the question "Date of Contact" and the location of contact labeled "Location." The Start Date and End Date are redundant data elements as this outreach data is a sub-assessment record-set. These new data elements can be seen in "Figure 9 – Outreach Sub-Assessment" below.

The following picklist values are acceptable Location definitions.

**Place not meant for habitation** (e.g. vehicle, abandoned building, bus/train/subway station/airport or anywhere outside that is not a Homeless Connect-type event)

**Service setting, non-residential** (e.g. Homeless Connect-type event, drop in center, day services center, soup kitchen, etc.)

**Service setting, residential** (e.g. emergency, transitional or permanent housing; treatment facility, including health, mental health, or substance abuse clinic or hospital; jail, prison, or juvenile detention facility; family or friend's room, apartment, condo, or house; foster care or group home)



Client Name: Johnson, Donald  
Client ID: 20  
Outreach

Save & Add Another Save & Exit Exit

**Assessment Date** 08/07/2009 09:06 AM

Date of Contact 08/05/2009 (mm/dd/yyyy) H G

Location Place not meant for habitation H G

Start Date 08/07/2009 (mm/dd/yyyy) H G

End Date (mm/dd/yyyy) H G

Client Name: Johnson, Donald  
Client ID: 20  
Outreach

Save & Add Another Save & Exit Exit

**Figure 9 – Outreach Sub-Assessment**

## DATE OF ENGAGEMENT

A new Date of Engagement data element has been added as a Date type assessment question. Record the appropriate date. The following direction is provided in the HUD Standards.

The definition of a client engagement may vary among programs and communities. As a matter of general principle, an engagement is defined as an interactive client relationship that results in a deliberate client assessment. Program staff may decide whether this is equivalent to the program entry date or a distinct date that may occur before, concurrent with, or after the program entry date. For the purpose of the APR, street outreach programs must report the number of clients that were engaged. Record this date as the two-digit month, two-digit day and four-digit year.

## EMPLOYMENT

### *Employed*

A new assessment question has been added called "Employed?" with related Yes, No, Don't Know, Refused picklist. This question will replace the existing assessment question "UNEMPLOYED." All historical values entered for Unemployed will be mapped to the new Employed field and responses for Yes and No reversed to adhere to the new way of asking this question.

## ***Employment tenure***

Updated the existing assessment question code HUD\_CURRENTEMP TENURE related Current Employment Tenure picklist to include all defined Standard values.

### ***[If unemployed] Is the client looking for work***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### ***[If employed] Is the client looking for additional employment or increased hours at their current job?***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

## **EDUCATION**

### ***Currently in school or working on any degree or certificate***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### ***Received vocational training or apprenticeship certificates***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### ***Highest level of school completed***

Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

### ***If client has received a high school diploma, GED or enrolled in post-secondary education, what degree(s) has the client earned***

This data element is currently collected in the HUD\_DEGREESEARNEDINFO sub-assessment question HUD\_EDUCATIONDEGEARNED with related Education Degrees picklist. Data collection via sub-assessment will continue to allow users to record multiple degrees earned by any client. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

## **GENERAL HEALTH STATUS**

This data element is currently collected in the assessment question HUD\_HEALTHCONDITION with related Health Condition picklist. HUD Standards suggested to determine how the client assesses his/her health (and the health of minors with the household, if applicable) in comparison to other people their age. Thus this question often has a label of “Health Condition Compared to People of Your Age.”

Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

## **PREGNANCY STATUS**

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

## **VETERAN’S INFORMATION**

### ***Military service eras***

This data element is currently collected in the HUD\_MILITARYSERVERAINFO sub-assessment question HUD\_MILITARYSERVICEERA with related Military Service Era picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.” Two picklist values have been deleted from the picklist as directed in the Standards.

### ***Served in a war zone***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### ***If yes, name of war zone***

This data element is currently collected in the HUD\_WARZONEINFO sub-assessment question HUD\_WARZONE with related War Zone picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

### ***If yes, received hostile or friendly fire***

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### ***Branch of the military***

This data element is currently collected in the HUD\_MILITARYBRANCHINFO sub-assessment question MILITARYBRANCH with related Military Branch picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

### ***Discharge status***

This data element is currently collected in the HUD\_DISCHARGETYPE with related Discharge Type picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

## CHILDREN'S EDUCATION

### *Current enrollment status*

New values of “Don’t Know” and “Refused” have been added to the existing picklist associated with this program-specific data element.

### *If yes, was/is the child connected to the McKinney-Vento Homeless Assistance Act school liaison?*

New assessment question SVP\_IFYESMCKINNEYVENTO has been added to record the “If Yes, Has McKinney-Vento Homeless Assistance liaison?” data element with a related picklist of Yes, No, Don't Know, Refused.

### *If yes, type of school*

This data element is currently collected in the IFYESTYPEOF SCHOOL with related If Yes, Type of School picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

### *If not enrolled, identify problems in enrolling child*

This data element is currently collected in the HUD\_CHILDENROLLDIFF sub-assessment question ENROLLMENTPROBLEM with related Child Enrollment Problems picklist. Updates have been made to the associated picklist to match HUD defined values including “Don’t Know” and “Refused.”

## SERVICE TRANSACTIONS (FOR HPRP)

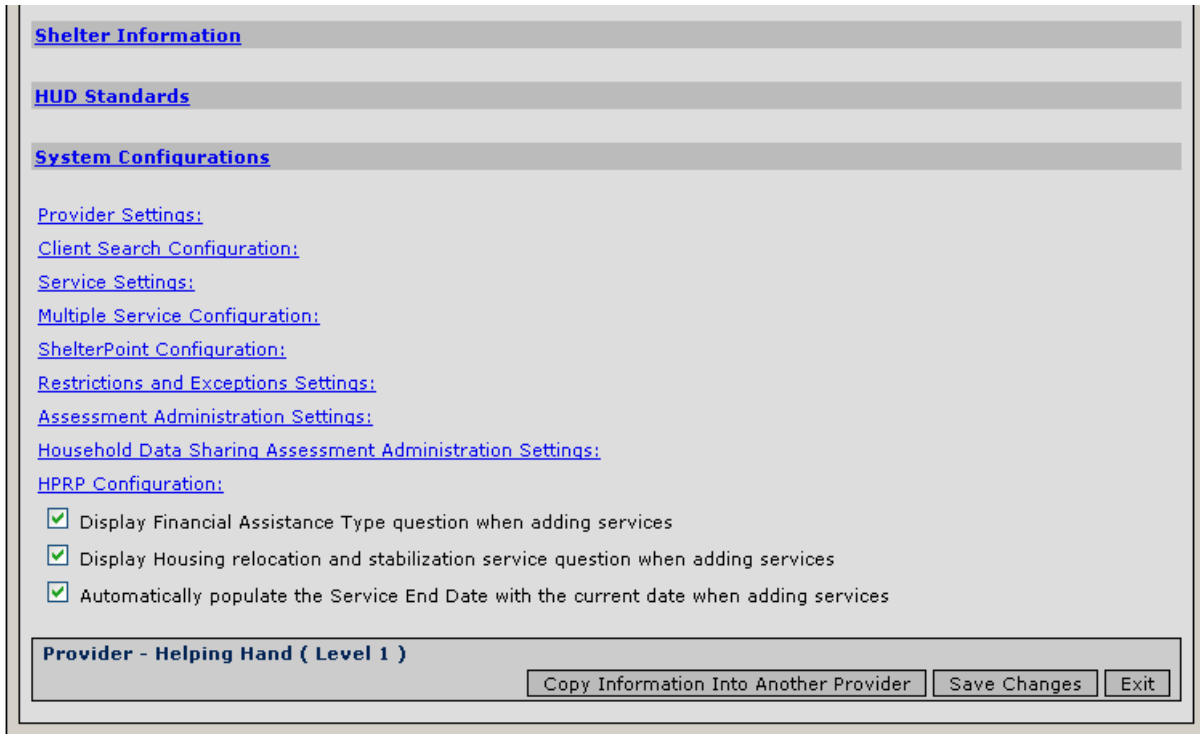
### HPRP CONFIGURATION

A new set of configuration selections has been added to the System Configuration area of the Provider admin screen. Click on the appropriate boxes to display HPRP relevant data collection elements on the Service Transactions screens within ClientPoint. The following options can be selected as further shown in “Figure 10 – HPRP Configuration admin screen” below.

**Display Financial Assistance Type question when adding services**

**Display Housing relocation and stabilization service question when adding services**

**Automatically populate the Service End Date with the current date when adding services**



**Figure 10 – HPRP Configuration admin screen**

## ***HPRP Service Transactions***

"Financial Assistance Provided will be captured via the existing Service Transaction section of SP. First a user will create a new service and then identify the most appropriate or desirable service/taxonomy term. If no taxonomy term is selected, then a ""Basic Needs"" or code ""B"" term will be recorded in the database when the record is saved. Regardless of the taxonomy term selected, the user of an HPRP program will need to select one of the HPRP allowable activities defined in a picklist on the same entry screen just below the taxonomy term selected.

Bowman has added these static picklists of activities labeled ""HPRP Housing Relocation & Stabilization Service Provided"" and ""HPRP Financial Assistance Type"" to the current Service Transaction Page (also added to the Mult Services screen) in order for a User to add one of the defined activities.

These new static picklists will be displayed in much the same manner that the current Provider Specific Service picklist is displayed.

There will be a setting/configuration in the provider profile which will make these fields visible to the designated HPRP programs. This new data element and picklist will also need to be added to the ART Service Universe in order to design the QPR.

The new data elements "HPRP Financial Assistance Type" and "HPRP Housing Relocation & Stabilization Service Provided" are shown below in "Figure 11 – Service Transaction with HPRP screen."

**Need**

Financial Amount  Notes about Need

**Service**

Service Provider

Start Date   :   End Date   :

Provider-specific Service

Service Type

HPRP Housing Relocation & Stabilization Service Provided

HPRP Financial Assistance Type

Source 1  Cost Of Service 1

Source 2  Cost Of Service 2

# of Units  Unit Type  Cost of Units

Service Followup Date  Actual Followup Date  Followup Made

**Referral**

Referral Date

Check this box to notify ServicePoint Providers by Email.

**Figure 11 – Service Transaction with HPRP screen**

Suggested HPRP Activity Mapping if selecting to be more specific than just ""Basic Needs"" is listed below.

QRP value >> Taxonomy term

=====

Financial Assistance:

Short-term rental assistance >> Rent Payment Assistance [BH-3800.7250]

Medium-term rental assistance >> Rent Payment Assistance [BH-3800.7250]

Security deposits (including total with VASH voucher at exit) >> Rental Deposit Assistance [BH-3800.7250]

Utility deposits >> Utility Deposit Assistance [BH-8900.9150]

Utility payments >> Utility Bill Payment Assistance [BH-8900.9100]

Moving cost assistance >> Moving Expense Assistance [BH-5000.5100]

Motel & hotel vouchers >> Homeless Motel Vouchers [BH-1800.8500-300]

Housing Relocation & Stabilization Services:

Case management >> Case/Care Management [PH-1000]

Outreach & engagement >> Street Outreach Programs [PH-8000]

Housing search & placement >> Housing Search Assistance [BH-3900.3100]

Legal services >> Legal Services [FT]

Credit repair >> Credit Rating Assistance [DD-5000.1600]

### ***HPRP Funding Source***

Three different HPRP funding sources have been added to the Source picklist for Users to differentiate between more than one HPRP grant provision. In addition to the Source 1, 2, 3, a cost of financial assistance can be captured in the Cost 1 and Cost 2 as needed. This information will be used when reporting amount of financial assistance provided and recorded in ServicePoint.

## **HUD 40118 APR REPORT UPDATES FOR HPRP**

### ***Section 11. Amount and Source of Monthly Income at Entry and Exit.***

The Monthly Income is now split between the monthly income and the non-cash benefits sub-assessments. The monetary amounts from the non-cash benefits are not currently being included in the income calculation for the clients. A client will show up as receiving a non-cash benefit like food stamps in the client income source count but the monetary value of that item is not applied to that client's monthly income amount.

### ***Section 14. Destination.***

The destinations stored in the system were converted to match the newer HPRP values. Some of the values in this section on the HUD APR report no longer exist in new HPRP guidelines and some items defined in the HPRP guidelines are not represented on the HUD APR report, so some subsections will appear to have a 0 value and other sections such as the 'Other' group may appear to be overloaded.

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