WISCONSIN ServicePoint

How-To Guide

ServicePoint 4.04

ENTRY / EXIT -- HOUSEHOLDS

WISCONSIN ServicePoint
HELP DESK________________

wisphelp@wisconsin.gov

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Household Set-up

How-To

✪ Create a household record

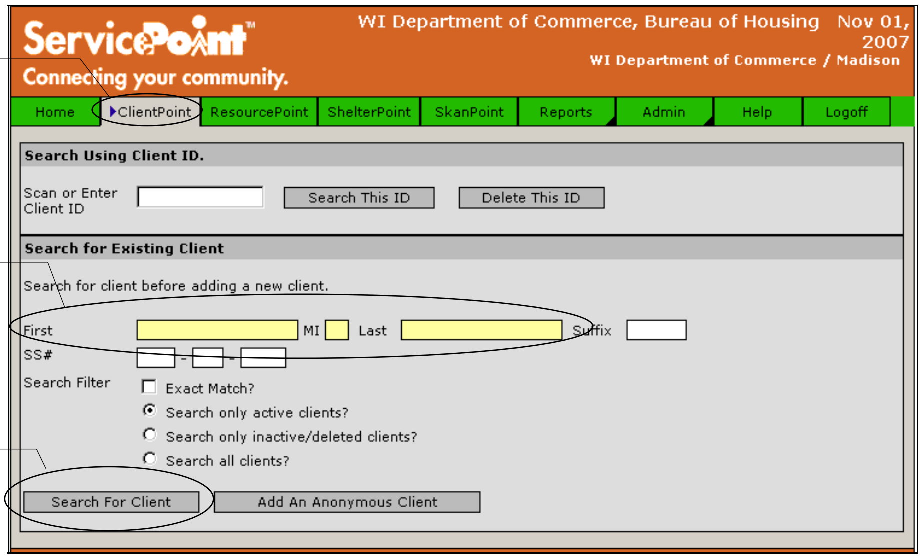
Record creation happens in the ClientPoint area of ServicePoint.

1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the one the clients in the household. Click Search for Client. (Always run a search to see if the client is in the system.)

ClientPoint tab.

Enter search criteria.

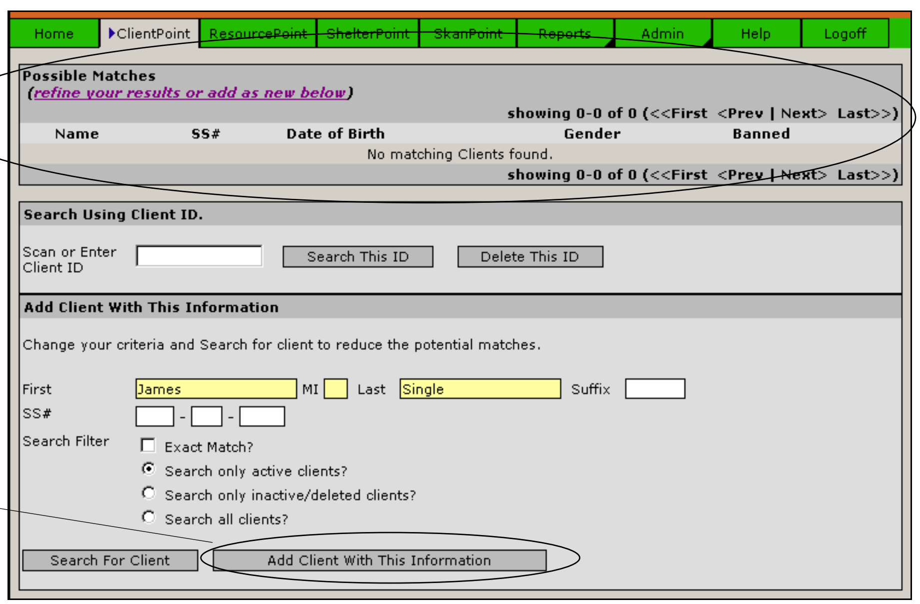
Search for Client button



3. If the client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client with this Information button.

Possible Matches area. In this example – none found. See page 5 for clients with an existing ServicePoint record.

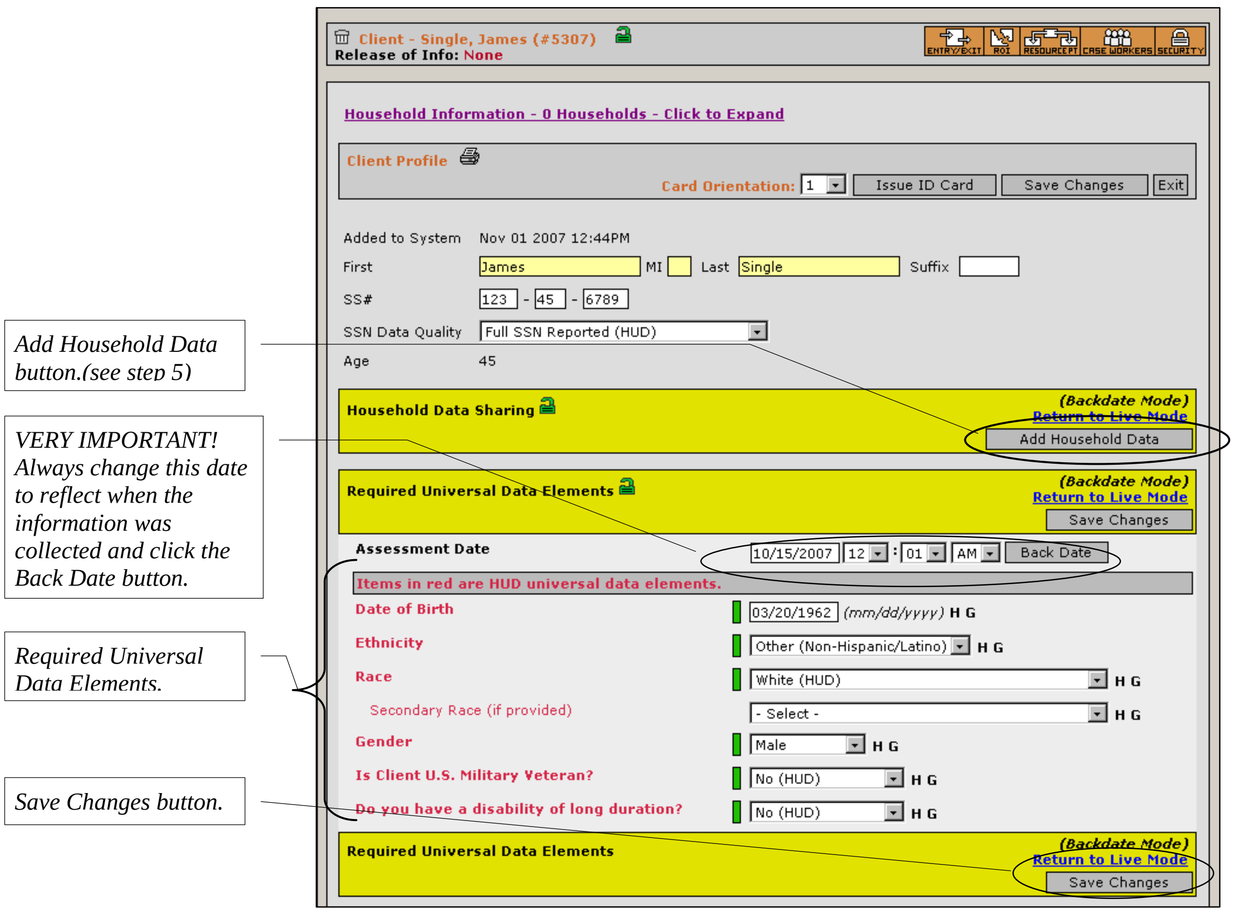
Add Client button.



4. On the client profile page, enter the date that the information was collected into the Assessment Date field and click the Back Date button. (This is a very important step. Always change the date to reflect the date that the information was COLLECTED.)
5. Complete the Required Universal Data Elements for this client and click the Save Changes button.

   Required Univeral Data Elements contains elements required by HUD that pertain to individual members of a household. This is completed for each person in a household and applied only to that individual.

   Conversely, the questions in ***Household Data Sharing*** contains elements required by HUD that pertain to all members of a household, not just the individual. They are grouped in this assessment so that after a household is created the questions can be answered one time and then applied equally to all members in a given household.

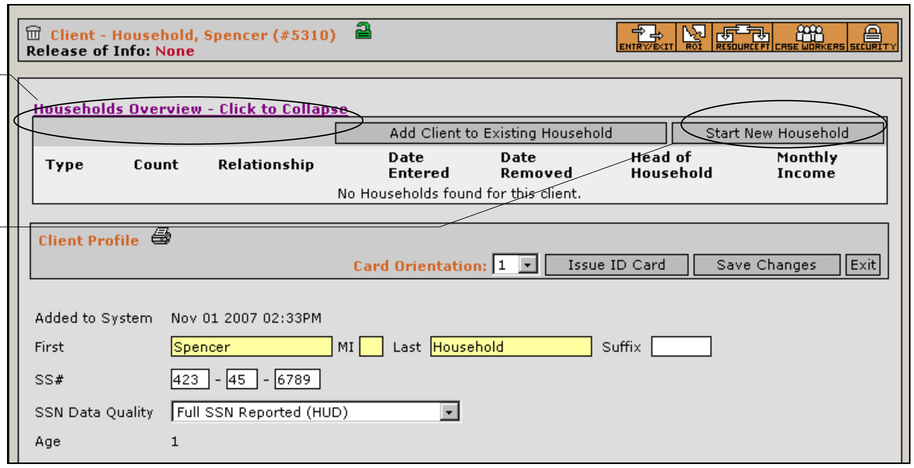


6. Repeat steps 1 -5 for each member of a household. Once you have entered the individual records, you can create the household.

7. While viewing one of the household member's profiles (it does not matter which one), click to expand the Household Overview section at the top of the screen. And click the Start New Household button.

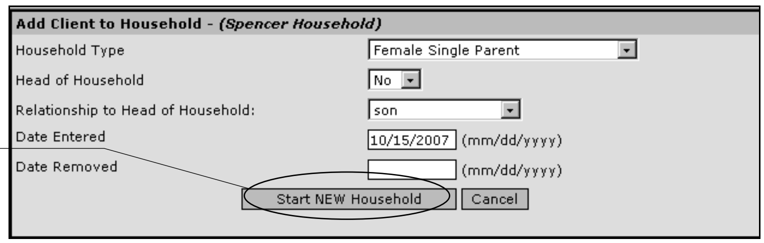
Household Overview section.

Start New Household button.



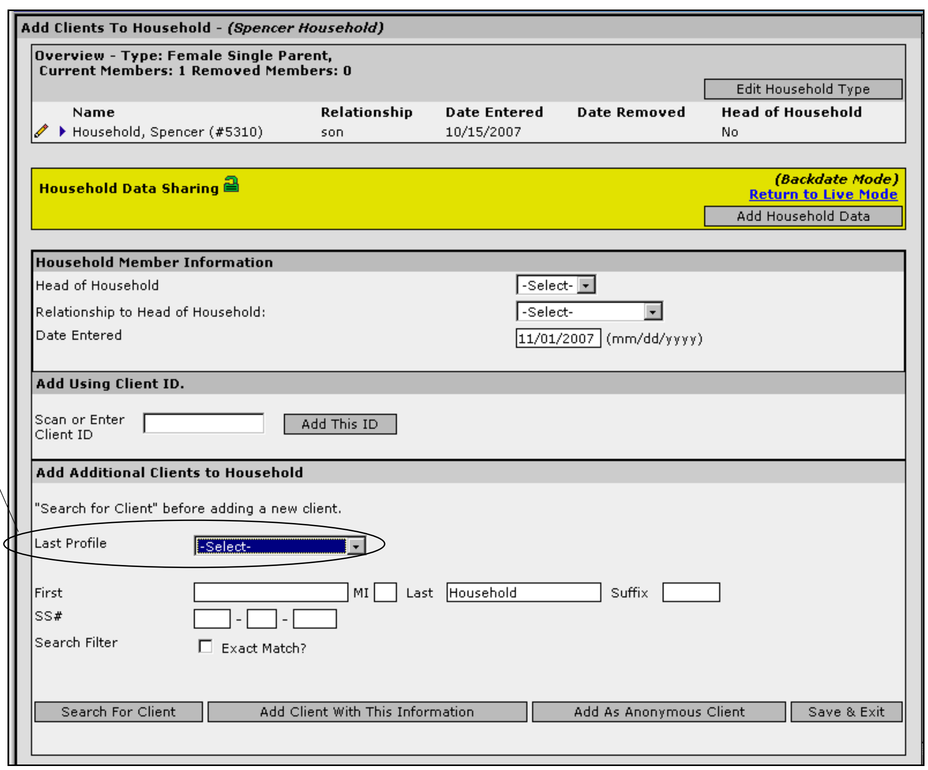
8. Complete the fields on this screen. Note whose record you are in when answering the Head of Household and Relationship to Head of Household questions. (The client is noted at the top of this screen.) Click Start NEW Household button.

Start NEW Household button.



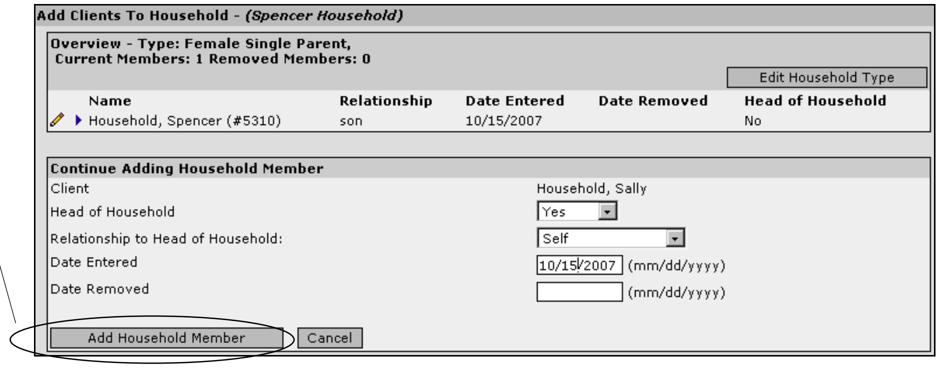
9. Add all members to the household by using the drop-down profile listing and choosing the name.

Last Profile drop-down.



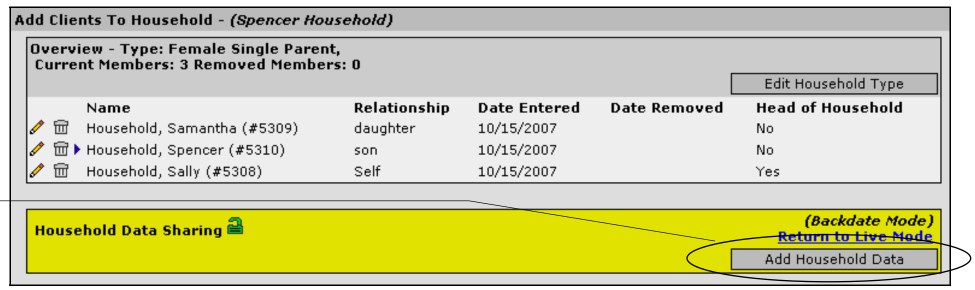
10. Answer the fields for the household member and click Add Household Member. Repeat steps 10 and 11 for each member of the household until all members have been added.

Add Household Member.



11. Once you have added the last household member, click the Add Household Data button found in the Household Data Sharing bar. (Also found on the main profile page or within the Add Clients to Household screen.)

Add Household Data button.

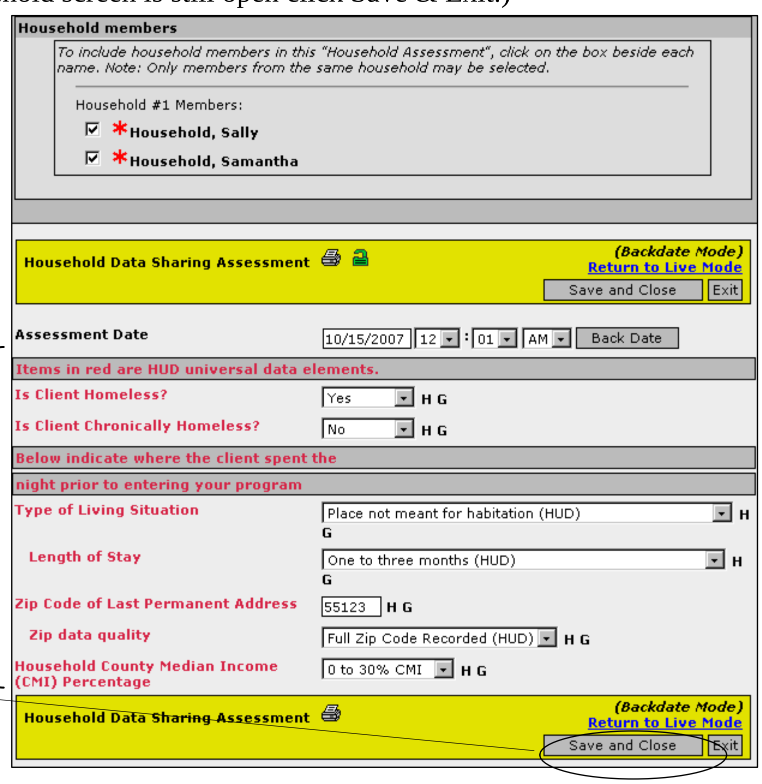


12. Click a check mark into those household members that need this information (usually everyone) and answer the Universal Data Elements for the household. These answers will apply to all the checked individuals.

13. Click Save and Close. (If your household screen is still open click Save & Exit.)

Universal Data Elements.

Save and Close button.



Entry / Exit

Entry / Exit is a module in Wisconsin ServicePoint that allows you to document some key demographics about a client when entering or beginning a program with an initial intake and then allows you to update those demographics upon exiting or ending the program. It is unique in that it ties to several reports that lay out both initial intake information and exit information. The other modules in Wisconsin ServicePoint only report on the most current information available in the system.

Entry / Exit is used to create the HUD-40118 APR. The HUD-40118 APR is the report that is used to document outcomes for the HUD funded Supportive Housing Program (SHP) and the State funded Transitional Housing Program (THP)

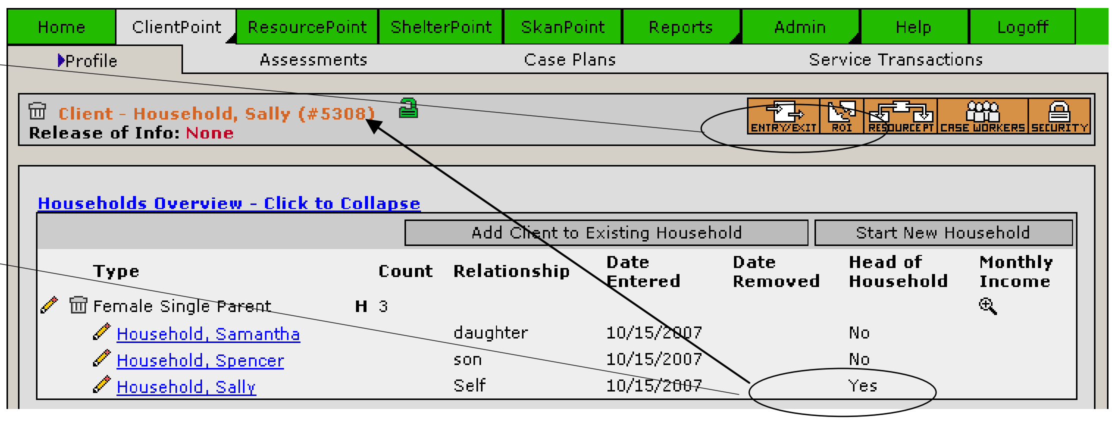
How-To

✪ Create an Entry / Exit ENTRY

1. At the top of the page, in the head of household record, click on the orange Entry/Exit tab located at the top right hand corner of the page.

Entry / Exit button.

Make sure that Entry/Exit is created in the head of household profile.

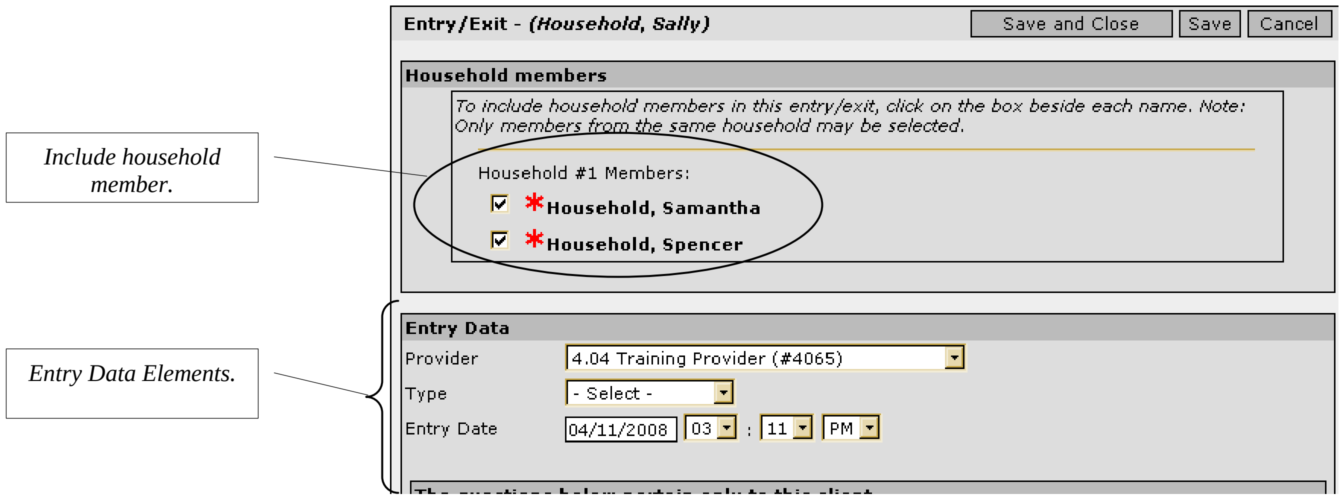


2. The Entry/Exit Window will appear. Click Add Entry/Exit.

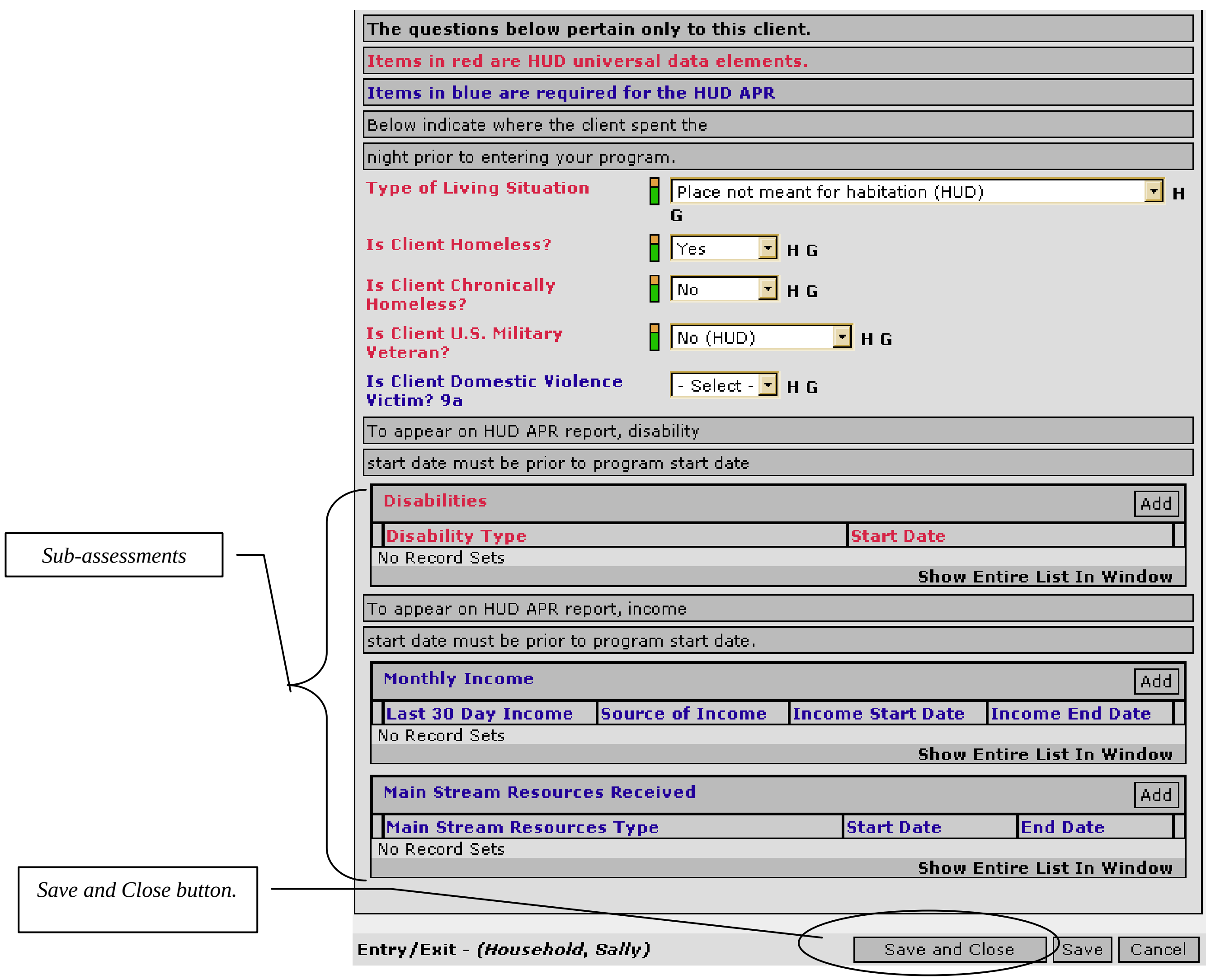
Add Entry / Exit button.

3. Now in the head-of-household's entry page, click a check mark into those household members that need this information (usually everyone) and answer the Entry Data elements. These answers will apply to all the checked individuals and the head of household. N*ote that the red and blue assessment questions below pertain only to the current client profile which is why it is important to be in the head-of-household profile.*

   In the Entry Data make sure that for the Provider question, you select the appropriate program. This is typically a specific program and NOT the agency name.



4. Continue filling out demographic information. Note that many of the questions have already been completed and have transferred into the Entry / Exit. Most of the other questions that need to be answered are sub-assessments. See the Sub-Assessments section for more details.



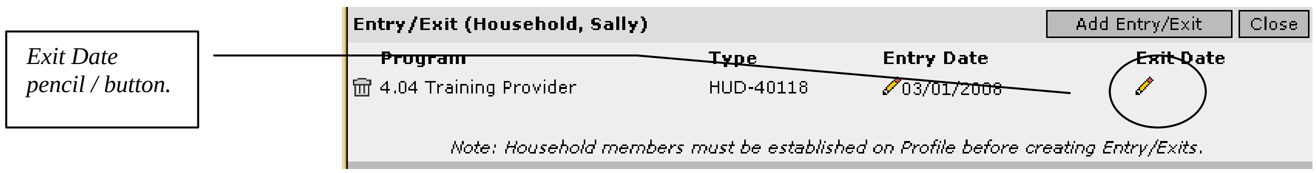
5. Click Save and Close.

How-To

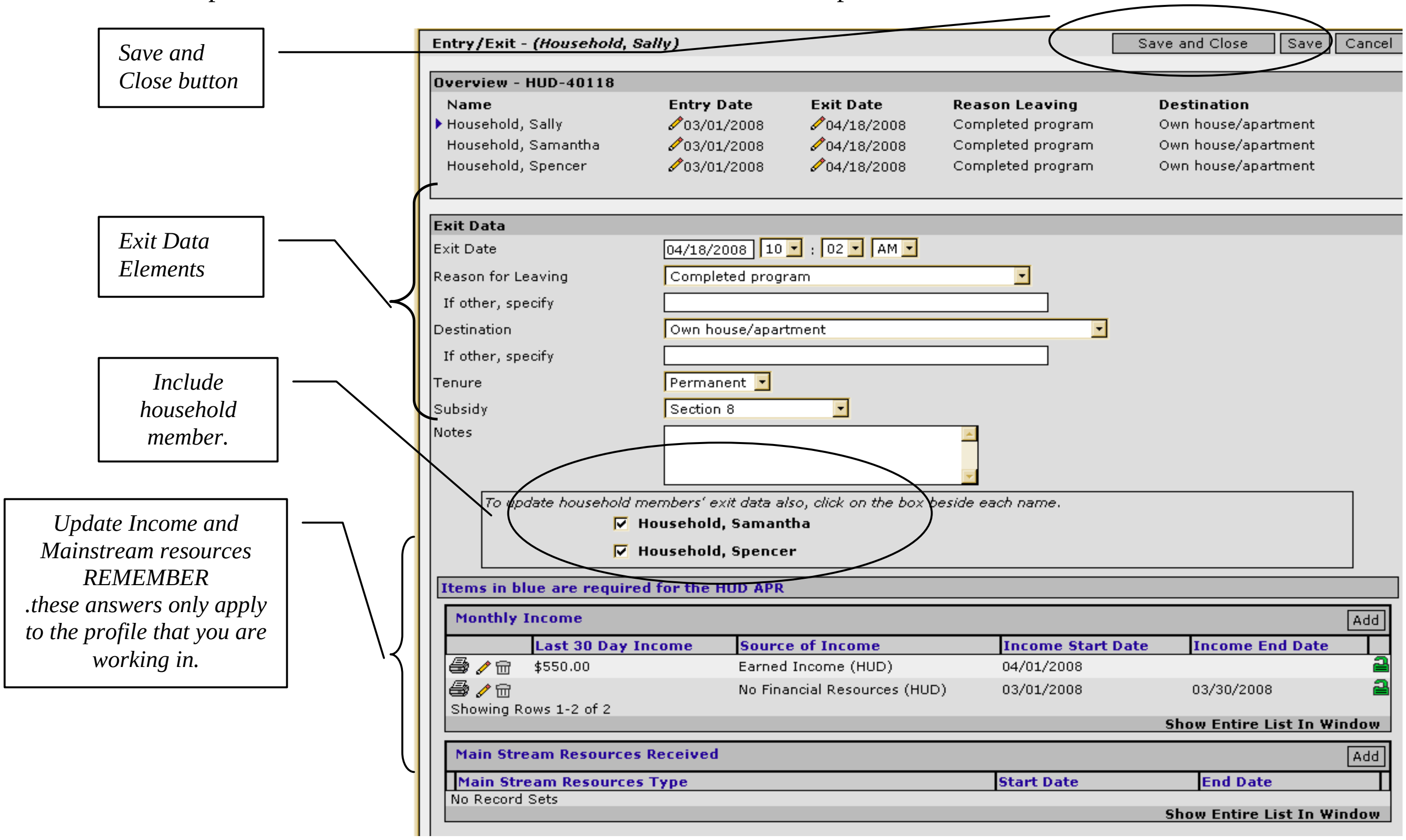
✪ Create an Entry / Exit -- <u>EXIT</u>

1. In the head of household record, click on the orange Entry/Exit tab located at the top right hand corner of the page. Again, make sure that you are in the head of household record.

2. Click on the pencil  beneath the Exit Date for the Entry/ Exit that needs to be closed out.



3. Check the boxes next to all household members' names to include them in the EXIT. Then complete the Exit Data elements. The Exit Data Elements pertain to all members of a household.



NOTE: *Destination, Tenure and Subsidy map to HUD APR destination categories in a particular way. Use the* ***Mapping APR Elements*** *section to ensure that data is entered correctly in the various fields so that is will come out correctly in the APR*

4. Update any changes to Monthly Income and Mainstream Resources Sub-assessment. These answers only apply to the head-of-household.

5. Click Save and Close

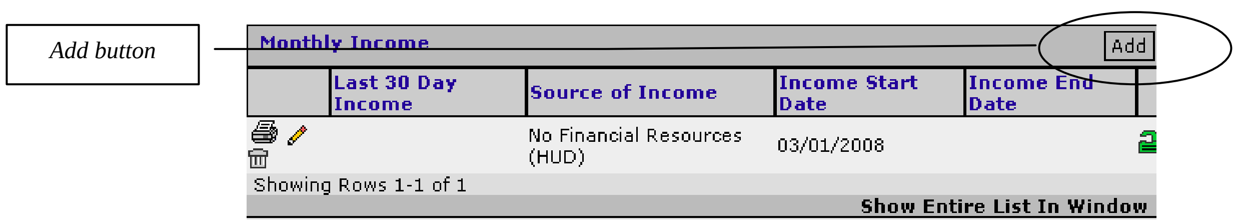
Sub-assessments

A ***sub-assessment*** is a type of response in Wisconsin ServicePoint that allows for more than one answer to a question. Sub-assessments appear as a separate window. Disability type, Income and Mainstream Resources are sub-assessments.

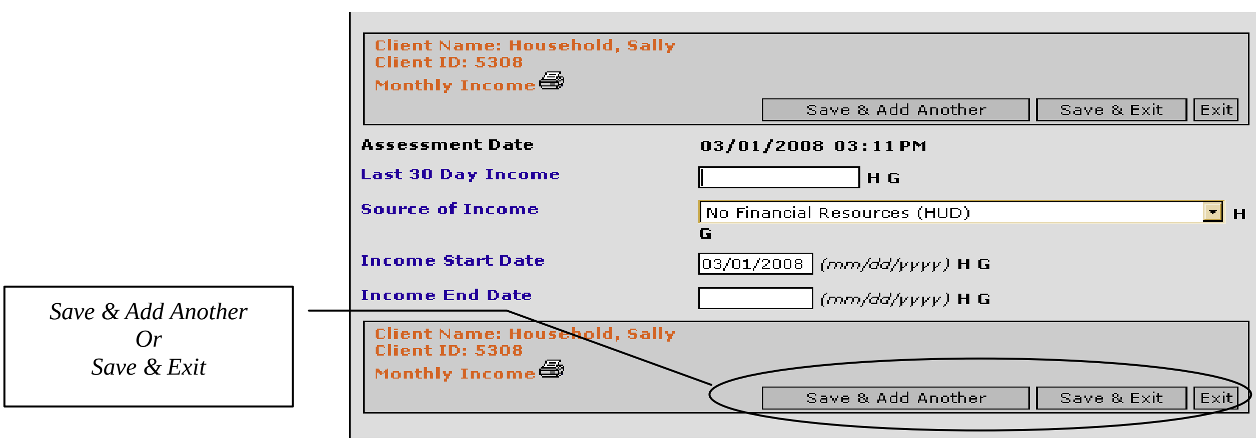
How-To

✪ Create a Sub-assessment –Adding a Source of Income

1. Click the add box in the far right-hand corner of the sub-assessment.



2. Complete the fields on the screen. Note that for an answer/income source to appear correctly in a HUD APR the answer/income start date must be on or before the Entry Date in the Entry/Exit.



3. If there are no other resources click Save & Exit if the head of household has other income click Save & Add Another and fill out a new screen. Repeat until all sources of income have been recorded. Once you press Save & Exit it will take a couple of seconds to load the new screen.

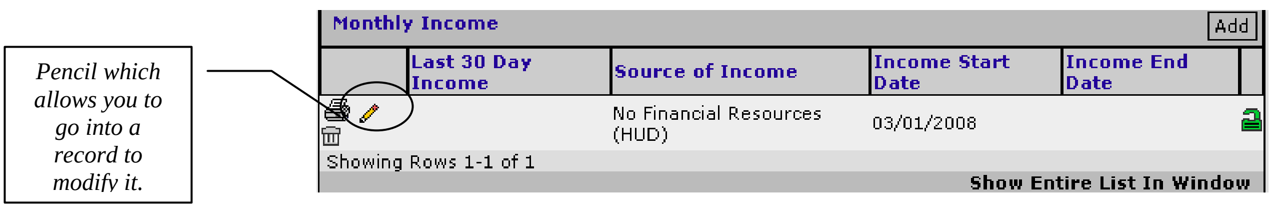
✪ Modify a Sub-assessment – Ending a Source of or an Amount of Income

*Previous answers in sub-assessments **should never be deleted or changed, they should only be closed out.** There are two main reasons that sub-assessment answers need to be modified or closed-out:*

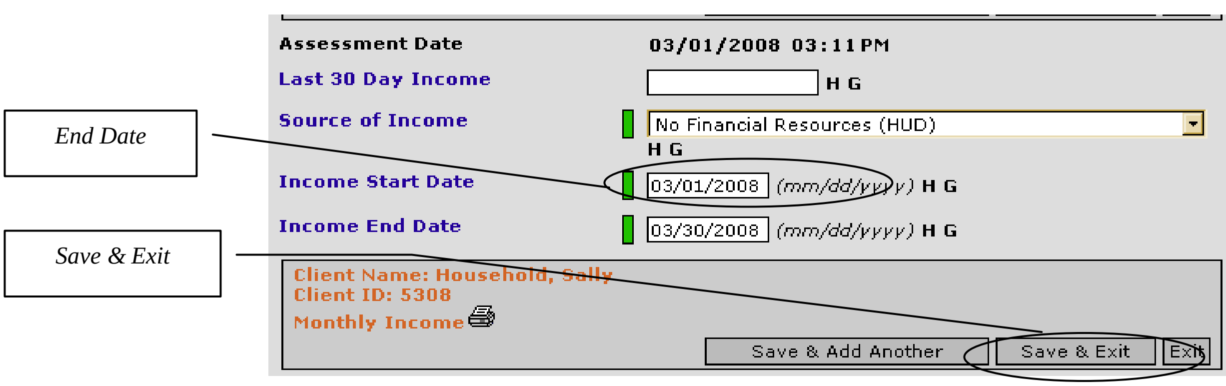
1. *When creating a new Entry/ Exit and there are answers in a sub-assessment that are no longer relevant or that are wrong. These old responses would need to be closed so that they will not appear in the HUD APR.*
2. *While in your transitional program, you help a client increase the amount of money received from a particular funding source. For example if a household increases their monthy FoodShares allowance you would close out the old amount and create a new response for the new amount.*

1. In the event that an income source for a head of household has changed or has ended, you will need to modify a sub-assessment answer or close out an answer. It is important to only modify and not delete answers that have become outdated, because previous answers to questions are important for historical reporting and may be used by other agencies.

   Click on the pencil of the item that needs to be modified.



2. Enter an End Date in the End Date field. To remove a record so it does not appear in an APR the end date must precede the Entry Date. For example, if a head of household had No Financial Resources listed in the income sub-assessment but actually was receiving some child support when entering the transitional program; you would need to enter an end date prior to the date for the Entry date.



3. Click Save & Exit.

Important Notes on Income and Mainstream Resources Sub-assessments:

1. *It does not matter how dollar values are entered. For no income leave the amount space blank.*
2. *The system will add Entry information for all items that A) has a Start Date on or before the HUD Entry Date; B) has an END Date that is null or after HUD Entry date.*
3. *The system will add Exit information for all items that A) have Start Date on or before the HUD exit date; B) does not have an end date on or before the HUD exit date or has an end date that is null and; 3) monthly income added at exit does not require an end date to be pulled into the HUD-40118 APR.*
4. *Income sources map to HUD APR destination categories in a particular way. Use the* ***Mapping APR Elements*** *section to ensure that data is entered correctly in the various fields so that is will come out correctly in the APR*

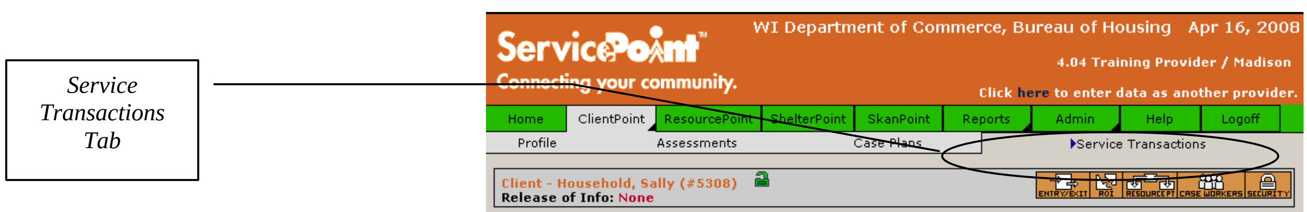
Service Transactions

How-To

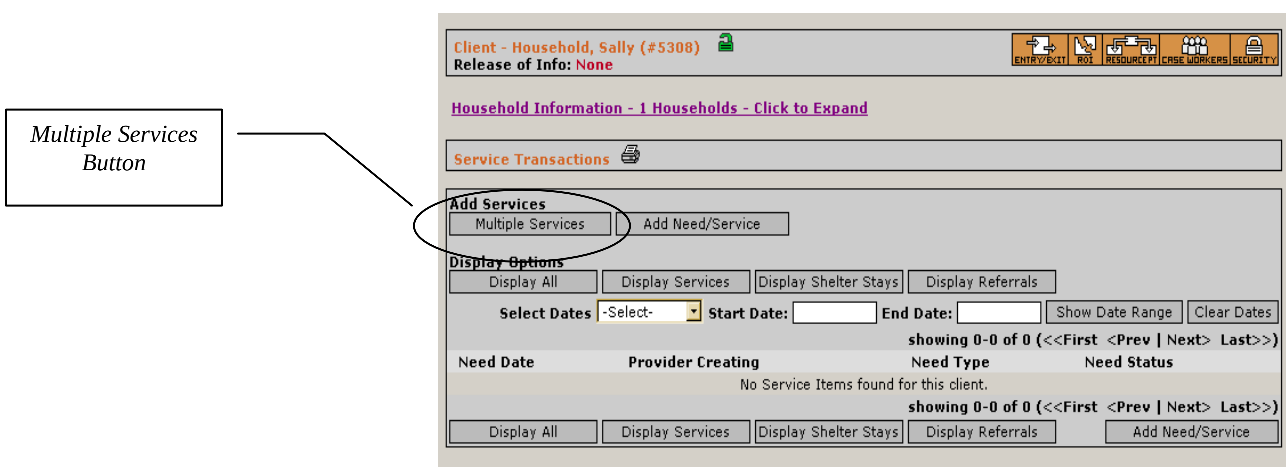
✪ Enter a Service Transaction

For every individual that receives a supportive or essential service that is paid for out of Transitional Housing Program (THP) funding, there needs to be a record of that service in the Service Transaction section in WISP.

1. Click on the Service Transaction tab.

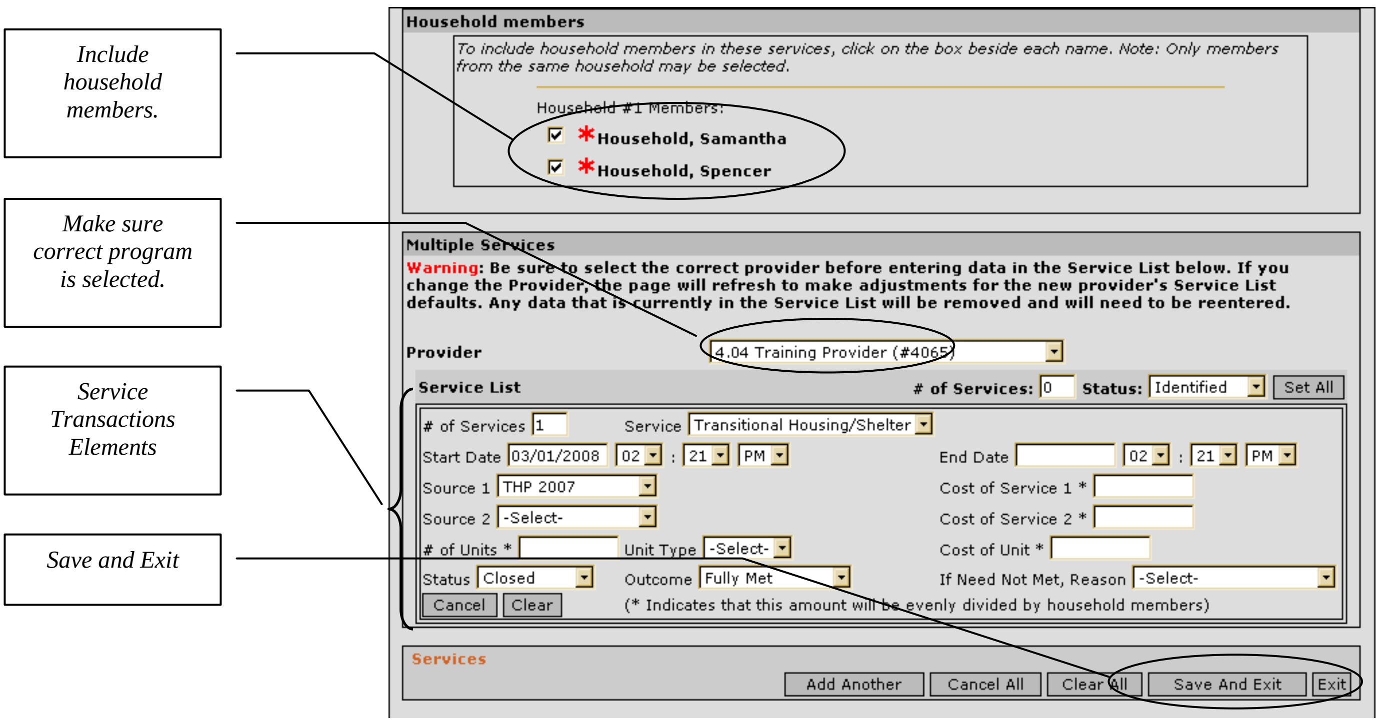


2. Click on Multiple Services. Multiple services allow more than one need and service to be input on one page which expedites the process.



3. On the Service Transactions page, click a check mark next to the household member's names that will also receive the service (usually everyone) and answer the corresponding elements. These answers will apply to all the checked individuals.

4. Answer all the Service Transaction elements:
   a. ***# of Services*** Fill in "1" in order to indicate a service is provided. If it is left blank or if there is "0" it will indicate that there is NO service.
   b. ***Service*** Make sure that all service for which you have received funding are available and selected.
   c. **Start Date** Make sure the date is on or after the Entry Date in the Entry/Exit.
   d. **Source 1** Select the fund source that is providing the funding for this activity. For THP activities, select **THP2008.**

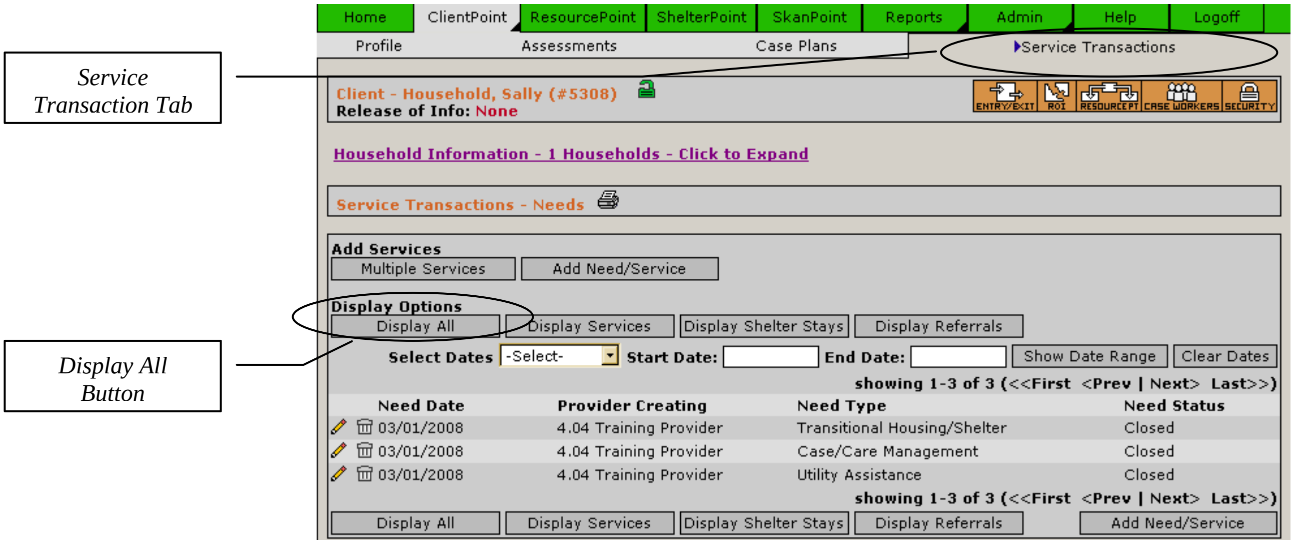


5. Click Save and Exit.

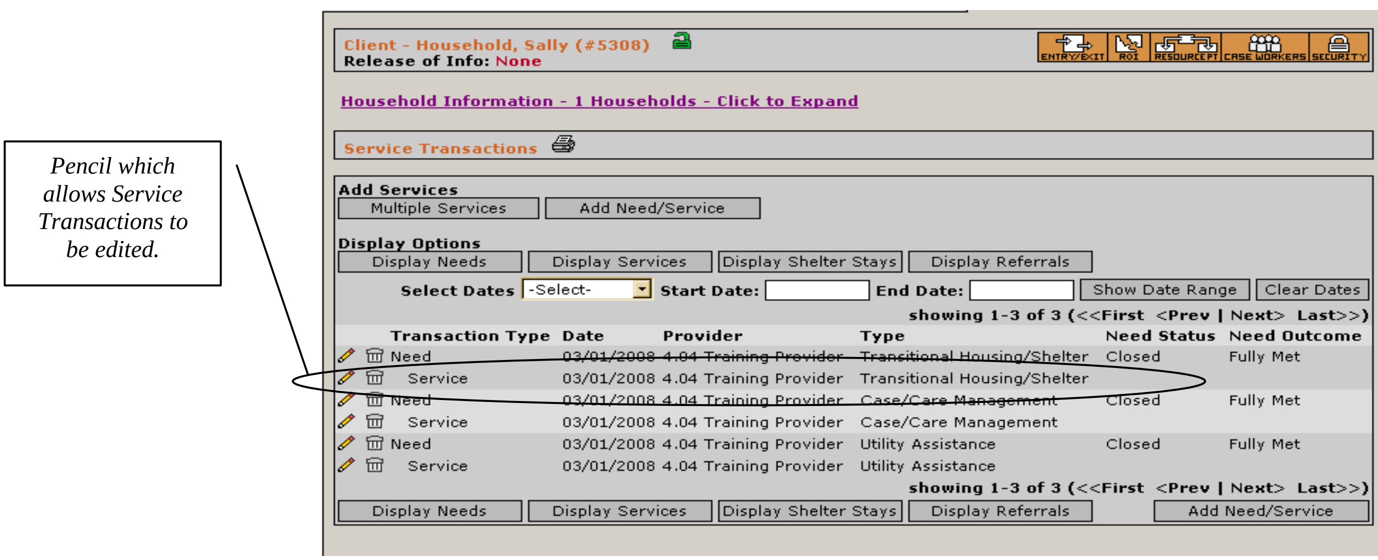
How-To

✪ Close Out a Service Transaction

1. Click on the Service Transaction Tab and click on the Display All button. The default view of service records only provides access to the need. In order to see the service component of the transactions. The Display All button lets you see the need the service



2. Click on the pencil next to the Service record that needs to be closed. Note that it is important to click the pencil next to the SERVICE and not the pencil next to the NEED. They are very different things.

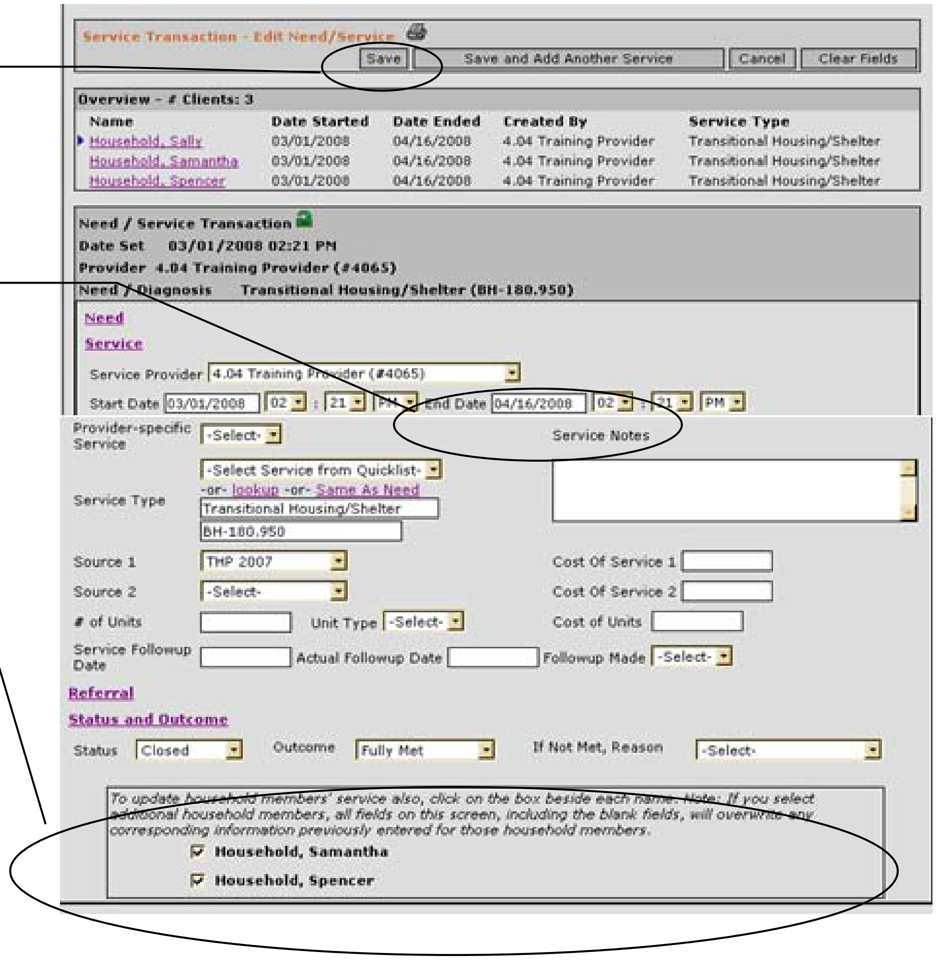


3. Ensure that all household members will have their service records updated and enter the end date for the service transaction. Then click Save.

Save Button

End Date

Include household member.



MAPPINGENTRY / EXIT ELEMENTS TO THE HUD APR

HUD APR QUESTION

11. Amount and Source of Monthly Income at Entry and at Exit. Of those participants who left during the operating year, how many participants were at each monthly income level and with each source of income? Also, please place the monthly income level and each source of income for **chronically homeless persons** in the second column of each chart. The number of participants in Chart A and B should be the same.

	A. Monthly Income at **Entry**	All	Chronic
a.	No income		
b.	$1-150		
c.	$151 - $250		
d.	$251- $500		
e.	$501 - $1,000		
f.	$1001- $1500		
g.	$1501- $2000		
h.	$2001 +		

	C. Income Sources At **Entry**	All	Chronic
a.	Supplemental Security Income (SSI)		
b.	Social Security Disability Income (SSDI)		
c.	Social Security		
d.	General Public Assistance		
e.	Temporary Aid to Needy Families (TANF)		
f.	State Children's Health Insurance Program (SCHIP)		
g.	Veterans Benefits		
h.	Employment Income		
i.	Unemployment Benefits		
j.	Veterans Health Care		
k.	Medicaid		
l.	Food Stamps		
m..	Other (please specify)		
n.	No Financial Resources		

RESPONSES IN SERVICEPOINT Income Sub-assessment --Source	RESPONSE IN THE HUD APR
Medicare (HUD) Other	Other
Child Support (HUD)	Other
Earned Income (HUD)	Employment Income
Self Employment Wages (non-HUD)	Employment Income
Food Stamps (HUD)	Food Stamps
General Assistance (GA)	General Public Assistance
Retirement Income from Social Security (HUD)	Social Security
TANF (HUD)	Temporary Aid to Needy Families (TANF)
Unemployment Insurance (HUD)	Unemployment Benefits
A Veteran Disability Payment (HUD)	Veterans benefits
Other Source (HUD)	Other
Medicaid (HUD)	Medicaid
SSI (HUD)	Supplemental Security Income (SSI)
SSDI (HUD)	Social Security Disability Insurance (SSDI)
SCHIP (HUD)	State Children's Health Insurance Program (SCHIP)
Veteran's Administration (VA) Medical Services	Veteran's Health Care
Private Disability Insurance (HUD)	Other
Worker's Compensation (HUD)	Other
Veteran's Pension (HUD)	Veterans benefits

Pension From a Former Job (HUD)	Employment Income
Alimony or Other Spousal Support (HUD)	Other
No Financial Resources (HUD)	No Financial Resources
Special Supplemental Nutrition Program for WIC (HUD)	Other
TANF Child Care Services (HUD)	Temporary Aid to Needy Families (TANF)
TANF Transportation Services (HUD)	Temporary Aid to Needy Families (TANF)
Other TANF-Funded Services (HUD)	Temporary Aid to Needy Families (TANF)
Section 8, Public Housing or rental assistance (HUD)	Other
No Financial Resources (HUD) with NO dollar amount entered	No Financial Resources
No Financial Resources (HUD) WITH a dollar amount entered	Other
Customer created fields with a dollar amount entered	Other
Customer created fields with no dollar amount entered	No financial resources

HUD APR QUESTIONS:

14. Destination. Of those participants who **left** during the operating year (from 2c, columns 1 and 2), how many left for the following destination? Also, please place the destination of **chronically homeless persons** who **left** during the operating year in the second column.

			All	Chronic
PERMANENT (a-h)	a.	Rental house or apartment (no subsidy)		
	b.	Public Housing		
	c.	Section 8		
	d.	Shelter Plus Care		
	e.	HOME subsidized house or apartment		
	f.	Other subsidized house or apartment		
	g.	Homeownership		
	h.	Moved in with family or friends		
TRANSITIONAL (i-j)	i.	Transitional housing for homeless persons		
	j.	Moved in with family or friends		
INSTITUTION (k-m)	k.	Psychiatric hospital		
	l.	Inpatient alcohol or other drug treatment facility		
	m.	Jail/prison		
EMERGENCY SHELTER (n)	n.	Emergency shelter		
OTHER (o-q)	o.	Other supportive housing		
	p.	Places not meant for human habitation (e.g. street)		
	q.	Other (please specify)		
UNKNOWN	r.	Unknown		

**HUD encourages programs to limit the use of the "Other Supportive Housing" APR response category. Programs should report destinations to housing that are permanent or transitional in APR categories (a) through (h) or in categories (i) through (j), respectively. Exits to emergency shelters should be reported in category (n).*

RESPONSES IN SERVICEPOINT			RESPONSE IN THE HUD APR
Destination in WISP	**Subsidy in WISP**	**Tenure in WISP**	
Emergency Shelter	All	All	Emergency Shelter
Transitional Housing	All	All	Transitional Housing
Permanent Housing for formerly homeless (SHP, S+C, or SRO Mod Rehab)	S+C	All	Shelter Plus Care (S+C)
Permanent Housing for formerly homeless (SHP, S+C, or SRO Mod Rehab)	Not S+C	All	Permanent other subsidized house or apartment.
Psychiatric hospital or other psychiatric facility	All	All	Institution psychiatric hospital
Substance Abuse Treatment Facility or Detoxification Center	All	All	Institution inpatient alcohol or other drug treatment facility.

Hospital (non-psychiatric)	All	All	Other (specify)
Jail, prison or juvenile detention facility	All	All	Institution jail/prison
Don't Know	None	All	Unknown
Don't Know	Public Housing	All	Public Housing
Don't Know	Section 8	All	Section 8
Don't Know	S+C	All	S+C
Don't Know	HOME program	All	HOME subsidized house or apartment
Don't Know	HOPWA program	Permanent	Permanent other subsidized house or apartment
Don't Know	HOPWA program	Transitional or NULL	Other supportive housing
Don't Know	HOPWA program	Don't Know Refused	Unknown
Don't Know	Other housing subsidy Don't know Refused	All	Unknown
Refused	None or NULL	All	Unknown
Refused	Public Housing	All	Public housing
Refused	Section 8	All	Section 8
Refused	S+C	All	Shelter Plus Care (S+C)
Refused	HOME program	All	HOME subsidized
Refused	HOPWA program	Permanent	Permanent other subsidized house or apartment
Refused	HOPWA program	Transitional or NULL	Other supportive housing
Refused	HOPWA program	Don't Know Refused	Unknown
Refused	Other housing subsidy Don't know Refused, or NULL	All	Unknown
Room, apartment or house that you Rent	None or Null	All	Rental house or Apartment (no subsidy)
Room, apartment or house that you Rent	Public Housing	All	Public Housing
Room, apartment or house that you Rent	Section 8	All	Section 8
Room, apartment or house that you Rent	S+C	All	Shelter Plus Care (S + C)
Room, apartment or house that you Rent	HOME program	All	Home subsidized house or apartment
Room, apartment or house that you Rent	HOPWA program	Permanent	Permanent other subsidized house or apartment
Room, apartment or house that you Rent	HOPWA program	Transitional or NULL	Other supportive housing
Room, apartment or house that you Rent	HOPWA program	Don't Know Refused	Unknown
Room, apartment or house that you Rent	Other housing subsidy	All	Permanent other subsidized house or apartment
Room, apartment or house that you Rent	Don't know Refused	All	Unknown
Apartment or house that you own	All	All	Homeownership
Staying or living in a family's room, apartment, or house	All	Permanent	Permanent: Moved in with family or friends
Staying or living in a family's room, apartment, or house	All	Not permanent	Transitional: Moved in with family or friends
Staying or living in a friend's room, apartment, or house	All	Permanent	Permanent: Moved in with family or friends
Staying or living in a friend's room, apartment, or house	All	Not permanent	Transitional: Moved in with family or friends
Hotel or Motel paid for w/out emergency shelter voucher	All	All	Other
Foster care home or foster care group home	All	All	Other
Place not meant for habitation	All	All	Other places not meant for human habitation
Other	None	All	Other
Other	Public Housing	All	Public Housing
Other	Section 8	All	Section 8
Other	S+C	All	Shelter Plus Care (S+C)
Other	HOME program	All	HOME subsidized house or apartment
Other	HOPWA program	Permanent	Permanent other subsidized house or apartment
Other	HOPWA program	Transitional Or Null	Other supportive housing
Other	HOPWA program	Don't know Refused	Unknown
Other	Other housing subsidy Or Null	All	Other (specify)
Other	Don't know Refused	All	Unknown