



Coordinated Entry: HMIS Training for VI-SPDAT for Single Individuals

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Login to the HMIS

1. Go to <http://washdc.servicept.com/> (no WWW)
(You can also get there from www.coordinatedentry.com and selecting “Conduct an assessment” from the center of the screen under “Trained and ready to go?”)
2. Input your username and password and select “Login”
3. Prior to looking or entering a new client, look to see that [YOUR AGENCY – Coordinated Entry] is on the top left hand corner of the screen. If it’s not, click on “Enter Data As” on the right hand corner of the screen. A list will pop up with all of your agencies’ programs. Click on the (+) sign next to [YOUR AGENCY – Coordinated Entry for Single Individuals].
4. From the left side of the screen, select ClientPoint

Search for the person in HMIS

5. Input their first and last names into the “Client Search” fields and select “Search”

If the person has already been assessed by your provider, their name will appear under “Client Results” along with 3 house icons to the left of their ID and name.

Client Results									
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count	
 	1	Example Client	123-45-6789	01/01/1980	Bob, Bobby, Robert	Male		0	

Showing 1-1 of 1

If additional people with similar names exist in the system, they will also appear beneath “Client Results,” but without the 3 house icons. While their names will appear, their assessment information will not appear unless they have been screened by your provider, or they have been screened by another provider who has inputted a current Release of Information that allows the information to be shared.

6. Select the record already inputted by your provider if they exist. If no record with the 3 house icons exists, input the following:
 - a. First Name
 - b. Last Name
 - c. Alias (Nickname if applicable)
 - d. Date of Birth
 - e. Social Security Number
7. Once you have inputted values for each of the above fields, select “Add New Client With This Information.” When the system prompts you with “You are about to add a new client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?” select “OK.”

Individual’s record

The system will take you to the Summary tab of the individual’s record.

Release of Information

Without a Release of Information, each agency will only be able to see the VI-SPDAT that they completed themselves. This defeats the purpose of coordinated assessment for single individuals. A Release of Information can be completed in the following manner:

- From the "Summary" tab, elect "Add Release of Information"

Client - (280883) Test, Example 🔒

(280883) Test, Example
Release of Information: **None**

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Entry/Exits

Program	Type	Entry Date	Exit Date
Coordinated Intake for Single Individuals	HUD	✎ 02/14/2014 ✎	

Showing 1-1 of 1

Add Entry / Exit

Release of Information

Provider	Permission	Start Date	End Date
Add ROI	No matches.		

- For "Provider," select your program's name that ends with "Coordinated Entry for Single Individuals." *Do not select the default agency* (anything with "Agency" in the name) Release Granted: "Yes"
- Start Date: same day as the date screened/"entry date"
- End Date: one year (365 days) from the date screened/"entry date"
- Documentation: "Signed statement from client"
- Witness: the staff's name who witnessed the Release of Information being signed

Adding the assessment

- To begin inputting assessment information, select "Add Entry / Exit"

Client - (280883) Test, Example 🔒

(280883) Test, Example
Release of Information: **None**

Client Information

Service Transactions

Summary

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Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Added to the system 02/14/2014 01:55 PM

Name	Test, Example	Gender	
Date of Birth		Primary Race	
Social Security		Secondary Race	

Release of Information

Provider	Permission	Start Date	End Date
Add ROI	No matches.		

Entry/Exits

Program	Type	Entry Date	Exit Date
Add Entry / Exit	No matches.		

15. For "Provider," select your program's name that ends with "Coordinated Entry for Single Individuals." *Do not select the default agency* (anything with "Agency" in the name)
16. "Type" = "HUD"
17. "Entry Date" = Date that the assessment was completed. *This is not the date that the information is being recorded within HMIS. Assessments recorded within HMIS after the information was initially collected can still be determined through other means.*
18. "Entry Time" = 12:01:00 AM unless the specific time the assessment was conducted is relevant to your provider
19. Select "Save & Continue"

VI-SPDAT assessment

20. Complete each of the fields, from "Interviewer's Name" through and including "Has consented to participate?"
21. For Social Security Number, please follow XXX-XX-XXXX format. For example, input 123-45-6789 not 123456789
22. For question 2. "How long has it been since you lived in permanent stable housing?" record the length of time in months. You will have to round up to the nearest integer. Record "1" for anytime from 1 day through 31 days, "24" for two years, etc.
23. After completing questions 1 through 3C, select "Add" under "VI-SPDAT Version 2" to complete the remaining questions

🔍
VI-SPDAT Version 2

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
<div style="border: 1px solid gray; display: inline-block; padding: 2px 10px; margin-top: 5px;">Add</div>						

Do not forget to select "Add" above in order to collect the 27 scored questions!

24. Leave the "Start Date," as it will automatically pull from the "Entry Date" that was inputted previously. This is the date that the assessment was completed.
25. For question 1, if the response is "Other," on the line below, specify the nature of the other location. Please note that "Outdoors" is inclusive of all places not meant for human habitation, including streets, sidewalks, doorways, car, bus or subway, park, abandoned buildings or storage units)
26. For question 2, select "One year or more," or "Less than 1 year"
27. Complete questions 3 through 19
28. For question 20, if the individual is biologically male, record either "No" or "N/A or Refused"
29. Complete questions 20 through 27
30. For question 27, the question must be asked exactly as written: "Yes or No – Has your current period of homelessness been caused by an experience of emotional, physical, psychological, sexual or other type of abuse, or by any other trauma you have experienced?"
31. To calculate the pre-screen total score, select "Calculate"
32. Close this portion of the assessment by selecting "Save"
33. Upon returning to the previous screen, scroll up to where you left off on the assessment, continuing with the last page of the VI-SPDAT pre-screen assessment. This section begins with the words "Finally, I'd like to ask you some questions to help us better understand homelessness, your eligibility for certain housing programs, and to improve housing and support services."
34. For individuals who respond "yes" to the question, "Have you ever served in the U.S. military?" complete each of the following "if yes" questions. Reservists must answer the "for reservists only, how long did you serve?" and record the response in months.
35. For "Income Source(s):" record multiple sources as "Food Stamps; SSI" or "Employment; SNAP"
36. For "Income Amount(s):" record in dollar format, such as "\$700" or "200; 153" if more than one income source
37. For "On a regular day, where is it easiest to find you and what time of day is easiest to do so?" do not forget to record a response. This question, as well as "Is there a phone number and/or email where someone can get in touch with you or leave you a message?" will be the only means by which a person will be contacted after the initial assessment. Record whatever information will enable later staff to contact this individual.
38. For the "other agencies or case workers that might be able to get in touch with you," there is no need to include your own information as the assessor (that information was previously recorded as "Interviewer's Name" and "Interviewer's Agency." Please record any additional agencies and staff, other than yourself, with whom the individual may have involvement.
39. If not taking the individual's photograph, once all VI-SPDAT fields have been completed, scroll down to the bottom of the page and select "Save & Exit."

Adding documentation to the record

Within the assessment itself, you can note whether you have attached to the individual's record any portion of six primary documents that are most helpful in moving someone into housing. Each document that you attach can be replied with "Yes"

When Verifying Documentation for Housing

Documentation Attached - Birth Certificate	<input type="checkbox"/> Yes
Documentation Attached - Social Security Card	<input type="checkbox"/> No
Documentation Attached - Government Issued Photo ID	<input type="checkbox"/> Yes
Documentation Attached - Proof of Income or Zero Income	<input type="checkbox"/> Yes
Documentation Attached - Verification of Homelessness	<input type="checkbox"/> Yes
Documentation Attached - DD-214 if Veteran	<input type="checkbox"/> No

40. To attach the actual document(s) to the record, on the client record, select the "Client Profile" tab from the "Summary" tab

The screenshot shows a client record for "Client - (1) Client, Example". The "Client Profile" tab is highlighted with a blue box. Below the tabs, the "Client Record" section displays the following information:

Name	Client, Example
Alias	
Social Security	111-11-1111
SSN Data Quality	
Age	61

41. Scroll down to the "File Attachments" section and select "Add New File Attachment"

42. For "Name," select "Browse" in order to locate the file on your computer that will be attached

The screenshot shows the "File Attachments" section with the "Add New File Attachment" button. An "Upload Attachment" dialog box is open, showing the "Name" field with a "Browse..." button and the text "No file selected." The "Description" field is empty. The "Upload" and "Cancel" buttons are at the bottom of the dialog.

43. Select "Upload"

The information is stored within the record, without any additional step required to "save" the information

Once the individual has been assigned to a housing provider

Once an individual has been assigned to a housing provider, record that information within the HMIS.

- 44. From the left side of the screen, select ClientPoint
- 45. If you have the individual’s HMIS ID number, input it where it says “Client ID#” and select “Submit”

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

- 46. If you do not have the individual’s HMIS ID number, repeat step 4: input their first and last names into the “Client Search” fields and select “Search.”
- 47. Access their record by selecting their name from the “Client Results” screen. The system will take you to the Summary tab of the client record.
- 48. Update the assessment by selecting the pencil icon to the left of the “Entry Date.” *Do not select “Add Entry/Exit!”*

Client - (280883) Test, Example 🔒

🗑️ (280883) Test, Example
 Release of Information: **None**

Client Information				Service Transactions																			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments																
<div style="border: 1px solid #ccc; padding: 5px;"> <h4 style="margin: 0;">Entry/Exits</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 25%;">Program</th> <th style="width: 25%;">Type</th> <th style="width: 25%;">Entry Date</th> <th style="width: 25%;">Exit Date</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Coordinated Intake for Single Individuals</td> <td style="padding: 5px;">HUD</td> <td style="padding: 5px;"> <div style="display: flex; align-items: center;"> ✎ 02/14/2014 ✎ </div> </td> <td style="padding: 5px;"></td> </tr> </tbody> </table> <div style="margin-top: 5px; display: flex; justify-content: space-between;"> Add Entry / Exit Showing 1-1 of 1 </div> </div>				Program	Type	Entry Date	Exit Date	Coordinated Intake for Single Individuals	HUD	<div style="display: flex; align-items: center;"> ✎ 02/14/2014 ✎ </div>		<div style="border: 1px solid #ccc; padding: 5px;"> <h4 style="margin: 0;">Release of Information</h4> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 40%;">Provider</th> <th style="width: 10%;">Permission</th> <th style="width: 20%;">Start Date</th> <th style="width: 30%;">End Date</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"> <div style="display: flex; align-items: center;"> ✎ Department of Veterans Affairs - CRRC - Coordinated Intake for Single Individuals </div> </td> <td style="padding: 5px; text-align: center;">Yes</td> <td style="padding: 5px; text-align: center;">02/14/2014</td> <td style="padding: 5px; text-align: center;">02/14/2015</td> </tr> </tbody> </table> <div style="margin-top: 5px; display: flex; justify-content: space-between;"> Add ROI Showing 1-1 of 1 </div> </div>				Provider	Permission	Start Date	End Date	<div style="display: flex; align-items: center;"> ✎ Department of Veterans Affairs - CRRC - Coordinated Intake for Single Individuals </div>	Yes	02/14/2014	02/14/2015
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- 49. Select “Save & Continue”
- 50. Scroll all the way to the bottom of the page, and if your client has been matched to a housing provider, it will be listed here: and select “Save &Exit”.

Once assigned to housing provider, agency assigned	<input style="width: 100%;" type="text" value="-Select-"/> G
Date assigned to housing provider	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> 🗑️ 🔄 📅 G
Date of housing placement	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> 🗑️ 🔄 📅 G

This section will be filled out by a housing provider once a client is matched to a housing resource.

Once the individual has been housed

Once an individual has been housed, record that information within the HMIS.

- 51. Repeat steps 49 through 55 in order to access the assessment
- 52. “Date of housing placement” will signify the date that the individual became housed.

- 53. Once finished, select "Save & Exit"
- 54. From the "Summary" tab, add a program exit by selecting the pencil icon to the left of "Exit Date"

Client - (280883) Test, Example 🔒

(280883) Test, Example

Release of Information: **None**

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Added to the system 02/14/2014 01:55 PM

Name	Test, Example	Gender	
Date of Birth		Primary Race	
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Entry/Exits

Program	Type	Entry Date	Exit Date
Coordinated Intake for Single Individuals	HUD	📅 02/14/2014	✎

Add Entry / Exit

Showing 1-1 of 1

Release of Information

Provider	Permission	Start Date	End Date
Add ROI	No matches.		

- 55. "Exit Date" = when the individual moved into housing
- 56. "Exit Time" = same time as the entry time (12:01:00 AM)
- 57. Reason for Leaving: "Completed program" (*signifying that the pre-screen assessment has been completed*)
- 58. Destination: choose from more than 20 possible locations in HMIS
- 59. Remaining fields can be left blank ("If Other, Specify," "Notes," etc.)
- 60. Select "Save & Continue"
- 61. Scroll to bottom of page and select "Save & Exit"