HUD-Funded Programs

- *Supportive Housing Program (SHP)*
- *Shelter Plus Care (S + C)*
- *Section 8 Moderate Rehab for Single Room Occupancy (SRO)*
- *Rural Housing Assistance and Stability Program (RHASP)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = HUD-40118*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the HUD-40118 All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *HUD-40118 All-Inclusve Assessment for all household members*
**for head of household: all remaining questions*
**other adults 18+ : disabling condition, disability, income/benefits and veteran information*
**all children: disabling condition, disability, and income/benefits questions*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑦ **Update income, non-cash benefits and disabilities yearly for ALL clients before APR is due**

- *If yes/no income or benefit questions change: backdate assessment to last date of quarter you are updating*

↓

⑧ **Entry/Exit button: Exit client/household from program**

- *Use the entry/exit button to record exit info & update hsg status, income, benefits & disabilities for ALL clients*
- *Add end dates to all services recorded before June 1st, 2010 (click "display services" in service transactions screen first). Services are no longer required for HUD programs after June 1, 2010.*

Required Reports and Due Dates

Report	Due to HUD
HUD-40118 APR (in ServicePoint)	annually (check data quarterly, at minimum)

HPRP-Funded Programs

- *Homeless Prevention and Rapid Rehousing Program*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = HPRP*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the HPRP All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household*

(2) *HPRP All-Inclusve Assessment for all household members*

**for head of household: all remaining questions*

**other adults 18+ : disabling condition, income/benefits and veteran information*

**all children: disabling condition and income/benefits questions*

NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑦ **Enter service transactions using "multiple services" button**

- *Record service transactions in 3-month periods. All clients must be re-evaluated every 3 months.*
- *Remember to enter a cost for the "HPRP financial assistance provided" service transaction.*

↓

⑧ **Update income and non-cash benefits yearly for ALL clients**

- *Update in HPRP All-Inclusive Assessment for every member of the household*
- *If yes/no income or benefit questions change: backdate assessment to last date of quarter you are updating*

↓

⑨ **Exit client/household from program**

- *Put end dates on all services (click "display services" in service transactions screen first)*
- *Use entry/exit button to record exit info & update hsg status, income & benefits for ALL clients*

Required Reports and Due Dates

ART Report	Due Date
Quarterly Performance Reports (QPRs)	The 5th of each month following quarter end date
Annual Performance Report (APR)	60 days after the end of the federal fiscal year

LTH-Funded Programs

- *Minnesota Housing's Ending Long-Term Homelessness Program (Ending LTH)*
- *DHS Supportive Services Fund (DHS-SSF)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = Basic Entry/Exit*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the LTH All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *LTH All-Inclusve Assessment for all household members*

**for head of household: all remaining questions*
**other adults 18+ : disabling condition, disability, income/benefits and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

(3) *Matrix Assessment for all adults 18+ and unaccompanied youth in Matrix tab; backdating not necessary*

↓

⑦ **Update required fields**

- *HH Heads, singles, unaccompaied youth: Update current residence when client moves; hsg cost and subsidy twice yearly, before running FY and calendar-year reports*
- *All adults 18+: update income/benefits and disabilities twice yearly, before running FY and calendar-year reports*
- *If yes/no income or benefit questions change: backdate assessment to last date of quarter you are updating*
- *All adults 18+ and unaccompanied youth: complete Interim matrix assessment every 6 months after entry*

↓

⑨ **Exit client/household from program**

- *Use entry/exit button to record exit info & update hsg status for ALL clients (income/benefits/disabilities: all adults)*
- *Add end dates to all services (click "display services" in service transactions screen first)*
- *Complete exit matrix for all adults 18+ and unaccompanied youth*

Required Reports and Due Dates

ART Counting Report	Due to Minnesota Housing
LTH Demographics and Entry Data , LTH Exits	Quarterly (data checks: every 2 months, minimum)
Above plus: LTH Residence, LTH Housing Information, LTH Income, Matrix Report	Bi-annually: FY end (Jul-Jun) & cal yr end (Jan-Dec) Data check reports: minimum every 2 months

FHPAP-Funded Programs

- *Minnesota Housing's Family Homeless Prevention and Assistance Program (FHPAP)*

Required Steps for HMIS

① Log on to ServicePoint: https://minnesota.servicept.com

↓

② Search for client or create a new client record

- *Do you have a signed consent form for each client?*

↓

③ Create a household

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ Entry/Exit button: Enter client/household into a program

- *Type = Basic Entry/Exit*

↓

⑤ Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)

↓

⑥ Complete assessments - some questions required for ALL clients - backdate to entry date

- *Single clients: complete the FHPAP All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *FHPAP All-Inclusve Assessment for all household members*
**for head of household: all remaining questions*
**other adults 18+ : disabling condition, income/benefits and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

(3) *Matrix Assessment for all adults 18+ and unaccompanied youth in Matrix tab; backdating not necessary*

⑦ Enter service transactions using "multiple services" button

- *Source = FHPAP*

↓

⑧ Update fields as needed

- *Income, non-cash benefits and disabilities updates are* ***optional*** *but can improve data quality.*
- *All adults 18+ and unaccompanied youth: complete Interim matrix assessment 6 months after entry and every 3 months thereafter*

↓

⑨ Entry/Exit button: Exit client/household from program

- *Use entry/exit button to record exit info & update hsg status for ALL clients*
- *Add end dates to all services (click "display services" in service transactions screen first)*

Required Reports and Due Dates

ART Counting Reports	Due to Minnesota Housing
FHPAP Demographics and Entry Data FHPAP Income, FHPAP Exits, Matrix Report	semi-annually and annually (run data check reports quarterly, at minimum)

THP-Funded Programs

- *DHS/OEO Transitional Housing Program (THP)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = Basic Entry/Exit*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the THP All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *THP All-Inclusve Assessment for all household members*

**for head of household: all remaining questions*
**other adults 18+ : disabling condition, disability, income/benefits and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑦ **Update income, non-cash benefits and disabilities annually for all adults 18+**

- *If yes/no income or benefit questions change: backdate assessment to last date of quarter you are updating*

↓

⑧ **Entry/Exit button: Exit client/household from program**

- *Use entry/exit button to record exit info & update hsg status for ALL clients (income/benefits/disabilities: all adults)*

↓

⑨ **Complete case plans**

- *Goal classification = THP; Goal type = Maintain permanent housing*

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
THP Demographics and Entry Data THP Income, THP Exits, THP Goals	semi-annually (run data check reports quarterly, at minimum)

ESGP-Funded Programs

- *DHS/OEO Emergency Shelter Grant Program (ESGP)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do <u>not</u> create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑤ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the <u>ESGP All-Inclusive Assessment</u>*
- *Households: complete the following 2 steps:*

(1) *<u>Household Data Sharing Assessment</u> in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *<u>ESGP All-Inclusve Assessment</u> for all household members*
**for head of household: all remaining questions*
**other adults 18+ : disabling condition, disability, and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑥ **Enter service transactions using "multiple services" button**

- *Add end dates to all services when client leaves (click "display services" in service transactions screen first)*

↓

⑦ **Update disabilities annually and when client leaves program for all adults 18+**

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
ESGP Counts	quarterly and annually (run data check reports every two months, at minimum) *Start date is July 1 - ESGP reports are cumulative*

ESP-Funded Programs

- *DHS/OEO Emergency Shelter Program (ESP)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do <u>not</u> create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑤ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the <u>ESP All-Inclusive Assessment</u>*
- *Households: complete the following 2 steps:*

(1) *<u>Household Data Sharing Assessment</u> in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *<u>ESP All-Inclusve Assessment</u> for all household members*
**for head of household: all remaining questions*
**other adults 18+ : disabling condition and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑥ **Enter service transactions using "multiple services" button**

- *Add end dates to all services when client leaves (click "display services" in service transactions screen first)*

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
ESP Demographics & Services	semi-annually (run data check reports quarterly, at minimum) *Start date is July 1 - ESP reports are cumulative*

DHS Youth-Funded Programs

- *Youth in Transitions Program (DHS Youth)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do <u>not</u> create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = Basic Entry/Exit*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients:*
  <u>DHS Youth Step 1 Assessment</u> and
  <u>DHS Youth Outcomes Assessment</u>
- *Households: complete the following 3 steps:*

(1) *<u>Household Data Sharing Assessment</u> in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *<u>DHS Youth Step 1 Assessment</u> for all household members*
**for head of household: all remaining questions*
**other adults 18+ : disabling condition and veteran information*
**all children: disabling condition question*
NOTE: click on other household members' names in the "Households Overview" box to switch to their records

(3) *<u>DHS Youth Outcomes Assessment</u> for each client enrolled in program*

↓

⑦ **Entry/Exit button: Exit client/household from program**

- *Use the entry/exit button to record exit information and update housing status for ALL clients*
- *Add end dates to all services (click "display services" in service transactions screen first)*

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
DHS Youth Counting Report DHS Youth Demographics Report Barriers to Housing Stability	quarterly (run data check reports every two months, at minimum)

RHYA-Shelter-Funded Programs

- *DHS/OEO Runaway Homeless Youth Act - Emergency Shelters (RHYA-Shelters)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑤ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the ESGP All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *ESGP All-Inclusve Assessment for all household members*

**for head of household: all remaining questions*

**other adults 18+ : disabling condition, disability, and veteran information*

**all children: disabling condition question*

NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑥ **Enter service transactions using "multiple services" button**

- *Add end dates to all services when client leaves (click "display services" in service transactions screen first)*

↓

⑦ **Update disabilities annually and when client leaves program for all adults 18+**

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
ESGP Counts	quarterly and annually (run data check reports every two months, at minimum) *Start date is July 1 - ESGP reports are cumulative*

RHYA-TLP-Funded Programs

- *DHS/OEO Runaway Homeless Youth Act Transitional Housing (RHYA-TLP)*

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

↓

② **Search for client or create a new client record**

- *Do you have a signed consent form for each client?*

↓

③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

↓

④ **Entry/Exit button: Enter client/household into a program**

- *Type = Basic Entry/Exit*

↓

⑤ **Complete ROI and security information (ONLY if your agency has arranged with Wilder to share data with other providers)**

↓

⑥ **Complete assessments - some questions required for ALL clients - backdate to entry date**

- *Single clients: complete the THP All-Inclusive Assessment*
- *Households: complete the following 2 steps:*

(1) *Household Data Sharing Assessment in head of household's record - check boxes next to other household members' names to transfer information to their records*

(2) *THP All-Inclusve Assessment for all household members*

**for head of household: all remaining questions*

**other adults 18+ : disabling condition, disability, income/benefits and veteran information*

**all children: disabling condition question*

NOTE: click on other household members' names in the "Households Overview" box to switch to their records

↓

⑦ **Update income, non-cash benefits and disabilities annually for all adults 18+**

- *If yes/no income or benefit questions change: backdate assessment to last date of quarter you are updating*

↓

⑧ **Entry/Exit button: Exit client/household from program**

- *Use entry/exit button to record exit info & update hsg status for ALL clients (income/benefits/disabilities: all adults)*

↓

⑨ **Complete case plans**

- *Goal classification = THP; Goal type = Maintain permanent housing*

Required Reports and Due Dates

ART Counting Report	Due to DHS/OEO
THP Demographics and Entry Data THP Income, THP Exits, THP Goals	semi-annually (run data check reports quarterly, at minimum)