

ROI, Security, and Consent FAQs:

- *I see a red padlock next to my client's name. What does this mean?*
 - A red padlock means that your client's record is "closed" and cannot be viewed by other agencies. If your agency shares data with other agencies and the client has signed an ROI form, complete the ROI and Security steps outlined above.
- *My padlock is red with a yellow exclamation point. What does this mean?*
 - A red padlock with an exclamation point signifies that your client's record is "closed with exceptions." This means that their record is viewable by specific agencies you have selected through the ROI and Security steps.
- *My padlock is green. What does this mean?*
 - A client's padlock should **never** be green! A green padlock means that the record can be accessed by anyone who uses HMIS, not just users within your agency. If you see a green padlock, call Wilder **immediately** to correct the problem.
- *What happens when a client's Release of Information (ROI) expires?*
 - When the release expires, other agencies will no longer be able to view your client's data. If your agency wishes to continue sharing data, you must obtain new ROI forms from your clients and repeat the ROI and Security processes.
- *What if a client doesn't want his/her name, Social Security number, date of birth, gender, race, or ethnicity entered into ServicePoint?*
 - If a client doesn't want his/her name entered into ServicePoint, they must be entered anonymously.
 - If a client doesn't want his/her Social Security number entered into ServicePoint, leave the Social Security field blank, then choose "unknown" or "refused" in the SSN data quality drop-box. SSN is used to create a client's unique ID, if possible, it should be entered.
 - A date of birth is required for **all** clients. If a client does not want their actual date of birth entered into ServicePoint, enter 01/01/YY.
 - If a client doesn't want his/her gender, race, or ethnicity entered into ServicePoint, choose unknown for these fields.

Household FAQs:

- *I'm entering single clients. Do I need to set up a household for him/her?*
 - No, you should **never** create a household for a single client.
- *I forgot to include someone in my household/someone just joined an existing household. How do I add them in?*
 - Go into the head of household's record.
 - In the "Households Overview" box, click on the pencil next to the household type.
 - Complete the "household member information" section, remembering to change the date to the date the client entered the household.
 - Search for the client and, if there are no matching records, click [Add Client With This Information](#).
 - Call Wilder for assistance with complicated household situations.
- *I entered the wrong household type. How do I change it?*
 - In the household overview section of the profile tab, click on the pencil next to the household type. A pop-up window will appear. Click on [Edit Household Type](#) to change this information.
- *I forgot to designate a head of household. What do I do?*
 - In the ClientPoint Profile tab, click on the pencil next to the person in the household you would like to designate as head of household. A pop-up window will appear where you can change the person's head of household status from "no" to "yes."
- *I entered the wrong date of birth/race/ethnicity for a household member. How do I correct this information?*
 - In the ClientPoint Profile tab, click on the specific client's name whose information you would like to edit. That client's profile will open, allowing you to make changes. Click on the "H" next to the question you need to change. Click on the trash can next to the wrong information in the pop-up box that opens. Then in the main profile screen, select the right option. Be sure to click on [Save Changes](#) when you have finished!
- *When and how can I remove someone from a household?*
 - You will **almost never** remove a client from a household! Even if a client leaves your program, they should still remain in the household. Only remove clients from a household if they physically leave (death, divorce, or removal of a child from the family by protective services are examples). In these cases, click on the pencil next to the client's name. A pop-up window will open, allowing you to enter a date the client was removed from the household.
 - If a client has not left the household but is not presently being served with the other household members, this can be indicated in the entry/exit or services section of ServicePoint.
 - Incorrectly removing a client from a household can cause errors in reporting.
- *A client left my program as a female single parent and re-entered a few months later as part of a couple with children. What do I do?*
 - Household types often change over time. In the situation above, you would go into the head of household's record and start a new household. The client's record would then show those two households. Do **not** change the original household in any way if they were previously served! When household composition changes, especially when clients are still being served by your program, you should always call Wilder for assistance.

Assessments FAQ

- *How do I know what information my funders require me to collect in ServicePoint?*
 - Go to the “HMIS data entry” page (<http://www.hmismn.org/forms/index.php>) where a required steps document for all funding sources can be found. Funder-specific required steps documents can be found by choosing the appropriate funding source from the table on the right.
- *What happens if I don't backdate an assessment?*
 - If you enter client assessment data after the program entry date and forget to backdate the assessment, the data will not appear on reports and you will have to re-enter all of the responses. This is because reports are designed to show information that is true when the client enters the program, and the assessment data is the date the computer uses to determine this.
- *Is there ever a time when I don't need to backdate an assessment?*
 - The only time you do not need to backdate an assessment is if you enter the data on the same day the client enters the program, **or** if you are completing the DHS Youth Milestones Assessment.
- *I entered my data using the Backdate mode button, but when I go back to the record, it still says today's date in the “Assessment date” box. Why is that?*
 - When you first enter a record, the assessment date will always be today's date. Click on the “H” next to the answer to a question in the assessment to see the history (who, what, when) of that question.
- *If I fill out the Household Data Sharing Assessment, why do I still have to fill out a Universal Assessment or other funder-specific assessment for all the adults in the household?*
 - The Household Data Sharing Assessment only transfers data that apply to the entire household, such as residence. Income, disability, and veteran status fields are unique to each client, and therefore must be completed separately.
- *What happens if I forget to fill out funder-specific assessment for all the adults in the household?*
 - If you do not fill out a funder-specific assessment for all adults in a household, your reports will show missing and incorrect data. You will need to go back and complete funder-specific assessments for all adult household members and unaccompanied youth and re-run your reports.
- *My client doesn't remember the zip code of their last permanent address but they know the city. Does it need to be their exact zip code or will any from that city do?*
 - Any zip code from that city will do. If you do not know a zip code from that city, you can look one up at: <http://zip4.usps.com>.

Service Transactions FAQ

- *I entered service information incorrectly/I forgot to include other household members in a service. What should I do?*
 - In both of these cases, you should **delete** the service and **re-enter** it, remembering to check the boxes next to household members' names if they are also receiving the service. To delete the service, make sure that you have first clicked **Display Services** under the "Display Options" section of the screen. Click on the trash can next to the service you would like to delete.

How do I end a service for a client?

- If a client's service has ended, go to the service transactions tab and make sure that you have clicked **Display Services** under the "Display Options" section of the screen (you will know that services are already displayed if you do not see this button). Click on the pencil next to the specific service you would like to end. A pop-up window will open. Enter an end date in the appropriate box. Remember to save when you are finished!
- *What is the "Add Need/Service" button and why shouldn't I use it?*
 - The "Add Need/Service" button requires you to enter a need and service separately. Minnesota's HMIS only uses service information, which is recorded using the **Multiple Services** button. Always use "multiple services," even if you only need to enter one service.