Chester County Client Information Management System

CCCIMS Training Manual

Updated October 2018
Data Entry Made Easy!
Follow the tabs through the record.
Log on to *ServicePoint®* with your assigned username and password. If you do not have your password, e-mail the CCCIMS Program Coordinator.

https://sp5.servicept.com/chestercounty
Home Page Dashboard

You can create custom Counts Reports

See posts on about changes to CCCIMS or upcoming trainings.
Help Button

You can click on the ‘Help’ button at anytime in CCCIMS for detailed information and step-by-step instructions on pertinent topics.
Help Button

The help menu will pop up in a separate window with a list of pre-selected topics customized depending upon where you are in CCCIMS. In the example below, CCCIMS had pre-selected the Client Profile help page because ‘Help’ was clicked from the Client Profile tab. You can also select the ‘Index’ tab for a table of contents or ‘Search’ to search by keyword.
Client Search

Click on the *ClientPoint* tab to search for a client.

![Client Search](image.png)

<table>
<thead>
<tr>
<th>Date</th>
<th>Headline</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/10/2017</td>
<td>New Assessments</td>
</tr>
<tr>
<td>01/25/2017</td>
<td><em>Coming Soon</em></td>
</tr>
<tr>
<td>12/21/2016</td>
<td>Standardized Guidelines for VI-SPDAT Notes</td>
</tr>
<tr>
<td>12/09/2016</td>
<td>Updated VI-SPDAT Policies and Procedures</td>
</tr>
<tr>
<td>11/18/2016</td>
<td>Code Blue Policy</td>
</tr>
<tr>
<td>11/07/2016</td>
<td>Updated VI-SPDAT Policies and Procedures</td>
</tr>
</tbody>
</table>
Global Search

CCCIMS also has a Global Search field which allows the user to search within any module by name or ID#. 
Global Search

For example, typing a name in the search field will allow for the search of this name in any module you have access to.

Selecting the ‘Search for Clients’ option will take you directly to the client search results page in ClientPoint.
Adding New Clients: Search

Search for your Client Record in ClientPoint using the Name, Alias, SSN, or Client ID Number Field.

TIP: Try searching using only the client’s name first as misspelled client names may not return results. If there are no results, hit ‘Clear’ and try searching by SSN.

You do not need to complete all the fields in order to search for a client.
Adding New Clients: Search

If no matches appear, click on the ‘Add New Client with this Information’ button.

If you the client you were looking for appears under the Client Results, select the pencil to the left of their name.
Add New Client

When adding a new client, this pop-up may appear.

• If the client is single, select ‘Add Client ONLY’ (then skip ahead to slide 12)

• If the client is a part of a household, select ‘Add Client and Add NEW Household’ (proceed to next slide)

• If the client is new, but the client is apart of a household that is already in the system, select ‘Add Client and SEARCH Households’
If you selected Add Client and Add NEW Household

1. Select the appropriate Household Type

2. Add additional family or household members using the Client Search
   (If the client appears in the client search, select the green circle to add them to the family. If they do not appear, select ‘Add New Client with this information.’)

3. After adding all the household members, select Continue.
Assign the Head of Household and the Relationship to the Head Household from the drop-down menu

- **Head of Household** – Defaults to “No” so only change to “Yes” for the person who is designated as the Head of Household.

- **Relationship to Head of Household** – Select the appropriate relationship. The client that is head of household should have ‘Self’ in this field

- **Joined Household** – Only change if this is different from the Back Date or Current Date
Fill out the Client Record for each new Client

Select a household member by clicking on their name in the left column. Select the pencil next to ‘Client Record’

Fill out the Name, Name Data Quality, SSN, SSN Data Quality and U.S. Military Veteran fields, and then click ‘Save’

Once a Client Record is successfully competed, the box next to their name will turn green.
After all the Client Records are completed for each Household Member, select ‘Save & Exit’

(skip to page 20)
If you selected **Add Client Only**

You will be taken to the summary tab by default. You will need to click on the “Client Profile” tab to continue.
Client Profile

Click on the pencil next to ‘Client Record’ and fill out the Name Data Quality, SSN, SSN Data Quality and U.S. Military Veteran fields, and then click ‘Save’

To avoid having to enter data twice, leave the ‘Client Demographics’ section blank. These fields are required in the Entry Assessment and once entered there will populate here.
Release of Information (ROI)

Select the ROI tab, and then click ‘Add Release of Information’
If adding the ROI for a Household, select the checkbox next to the Family ID.

If the client is a single individual, you do not have to select anything.
You must have an ROI for the program **and** the agency!

Your agency will be added automatically, so we need to add the program you are entering the client into. Select ‘Search’ to select the program that the client or household is entering.
Select the green icon next to the program to add it.

In the event the client is enrolling in multiple programs, continue selecting these programs by clicking the green icon to the left of the ‘Provider’ name. Your selections will appear below in the ‘Provider Search Selected Results’ window.

Click ‘Exit’ to continue.
ROIs

All programs you selected in the previous screen will be listed in the ‘Provider’ section. Select ‘Yes’ for Release Granted and enter an End Date no more than 1 year from the current date. Select the type of Documentation and enter your name in the ‘Witness’ field.
ROIs

After clicking ‘Save Release of Information’ you will be returned to the ROI tab. CCCIMS will have created a separate ROI for all of the programs you selected as well as your agency.

You can add a .pdf copy of the ROI by clicking on this binder clip.
If the Client Refuses to grant ROI

If your client does not grant permission for data sharing with partner agencies, please contact the CCCIMS System Administrator, Hilary Haake, at 610-344-5411. This client’s record will need to be locked to prevent other agencies from being able to view it.

Refusing to share data with our partner agencies will prevent the client from being included on the SPDAT list for permanent housing resources. It could also prevent outside agencies from identifying clients that would potentially be eligible for other programs and resources. Refusing to grant permission to share with other agencies does NOT prevent the client’s data from being entered into CCCIMS. It only prevents agencies from sharing that data with other CCCIMS partner agencies.
Program Entry

If you are an Emergency Shelter, Permanent Supportive Housing, or Emergency hotel voucher program continue to the next page. You will be entering your clients through ShelterPoint.

All other programs please skip to page 37.
ShelterPoint - Entry

Click on the gray ‘ShelterPoint’ link on the left side of the screen.
ShelterPoint - Entry

Select your program as the provider and then click ‘View All’ to see the unit list.
ShelterPoint - Entry

To enter someone into a unit, click on the green circle next to the appropriate unit.

You will be directed to the ShelterPoint > Client Search page.
ShelterPoint - Entry

Enter the client’s name or ID number to search for the person you are checking in.

In the search results, click on the green circle next to the client’s name.

For Households, search for the Head of Household first.
ShelterPoint - Entry

If this is the client’s first stay, you will receive the following message. Click ‘Continue.’

You are now on the Check In screen. Make sure the correct date and time are provided under the client’s name.
ShelterPoint - Entry

For Households, check in each family member by assigning them to a unit.

Under the Households Overview section, check the box next to each family member’s name and then click on the Assign Unit’ box to the right.

In the Unit List window, select the unit that client is staying in, and then hit ‘Select.’
ShelterPoint - Entry

After a unit has been assigned to everyone, follow the instructions on pages 38-45 to complete the Entry Assessment. Then scroll to the bottom of the screen and select ‘Save & Exit.’
ShelterPoint - Entry

Your client(s) are now checked in.

<table>
<thead>
<tr>
<th>Date In</th>
<th>Floor</th>
<th>Room</th>
<th>Bed</th>
<th>Hold</th>
<th>Client</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 001</td>
<td>Hold</td>
<td>EMPTY</td>
</tr>
<tr>
<td>03/22/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 002</td>
<td>(13985) Weasley, Percy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 003</td>
<td>Hold</td>
<td>EMPTY</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 004</td>
<td>(13978) Weasley, ron</td>
<td></td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 005</td>
<td>(13808) Weasley, Molly</td>
<td></td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 006</td>
<td>(13977) Weasley, arthur</td>
<td></td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 007</td>
<td>(13979) Weasley, ginny</td>
<td></td>
</tr>
</tbody>
</table>

To reserve a room, click on the blue ‘Hold’ link next to the appropriate unit. The link will turn red and say ‘HELD.’ To remove the hold the unit, just click on the red ‘HELD.’
ShelterPoint - Entry

Now that the client is entered, return to the client’s ClientPoint profile to enter information regarding Case Managers and plans.

Return to the client profile by clicking on the gray ‘ClientPoint’ tab on the far left.
Entry Assessment

Select the **Entry/Exit Tab**, and then ‘Add Entry/Exit’

![Client Information Table]

*Reminder: Household members must be established on Households tab before creating Entry/Exits.*
Entry Assessment

When Entering Households

Remember to select the **checkbox** next to the Family ID if everyone is entering the program. If someone is not entering, leave their name unmarked.
Entry Assessment

The **Provider** is the specific program that the client is enrolling in. To change the provider, click ‘Search’ and select your program by clicking on the green circle next to your program.

For **Type** *always* select **HUD**.
(The only exception is for programs dedicated to Veterans ONLY. Such programs will select VA)

Click ‘Save & Continue’ to open the Entry Assessment.
Fill out the assessment.

All Required Fields are marked with a ( * )
HUD Verifications

There are 4 HUD Verification links: Monthly Income, Non-cash Benefits, Health Insurance, and Disabilities.

Click on the blue link, as seen below, to complete a HUD Verifications. A pop-up window will appear requesting more information.

After the section has been completed, the box next to HUD Verification will turn green, as seen in the image above.
HUD Verifications

At the top of the pop-up window, select ‘No’ to move all the dots. Then mark ‘yes’ to any subcategories that may apply.

Additional information may be required for any subcategory marked ‘yes’.

Click Save & Exit to fill out the remainder of the Entry Assessment.
Street Outreach

(Date of Engagement) refers to the first interaction with the client that resulted in a client assessment or case plan and is only used for street outreach programs.

To add any additional interactions with the client past the Date of Engagement, click ‘Add’ and a pop-up window will request the date of the interaction. This is not required.

Residential Move-in Date is **required for Rapid Re-housing programs ONLY**.
Entry for Households

Fill out each Household member’s entry assessment by selecting their name in the Household Members Table.

After the assessment is filled out for each household member, the assessment checkbox will turn green.
Save & Exit

To save and *continue* adding information, Click ‘Save’ at the bottom of each assessment. After the Entry assessment is completed for all household members, select ‘Save and Exit.’

If you need to correct any data collected at Entry you can re-open the entry assessment by selecting the pencil icon next to the entry date.

Any data entered will correspond with the time and date stamp shown in the upper right hand corner of the Entry Assessment tab.
*Not Required* Select the ‘Case Manager’ tab to assign a case manager. Select ‘Add Case Manager’ and in the pop-up, fill out the appropriate information.
Case Plans

*Not Required* Select the ‘Case Plans’ tab to add case plans and goals.
Next, select the ‘Service Transactions’ tab. From here, you can:

- Add a Service
- Make a Referral to another Agency
- Review previous Services Received
- *(ShelterPoint Providers Only)* Modify the Shelter Stay
Add a Service

To add a service, select the **Service Transactions** tab, and then select ‘**Add Service**’
Add a Service

To add a service received, select the specific program next to ‘Service Provider,’ the start date, and the Service Type. Click ‘Save & Continue,’ and you will be directed to the Edit Service page.
Add a Service

On this page, you can add Service Notes, record the funding used to provide the service, and follow-up information. These sections are not required.

*Required* You must select the status of the need at the bottom of the page. Selection Options include: Identified, In Progress, and Closed.

Click ‘Save & Exit.’
Review Previous Services

You will be redirected to previous services received, as seen in the image below.

By clicking on the pencil next to a service listed, you can open and review that service.
Referrals

To refer a client to another agency, select the ‘Referral’ tab and then click ‘Add Referral.’
Referrals

If entering for a family, remember to check the box next to the each member’s name.

In the needs assessment, click on the appropriate service. When the service is highlighted, click ‘Add Terms.’ To pick multiple terms at once, press the ‘CRTL’ while clicking on the next service.
Referrals

Refer the service to a specific agency by selecting a program from the **Referral Provider Quicklist** and clicking ‘Add Provider.’

To see the program(s) you selected, Scroll down to bottom of the screen and review your selections listed under ‘Selected Providers’.
Referrals

Make sure the box is checked for each service you want to refer.

If the box is **not** checked, the client will **not** be referred for that service.
Referrals

If all the information is correct, select ‘Save All.’

To change the date of the need

To add notes, click on the notepad

<table>
<thead>
<tr>
<th>Need</th>
<th>Amount if Financial</th>
<th>Need Status / Outcome / If Not Met, Reason</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Search Assistance (BH-3900.3100)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homeless Permanent Supportive Housing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(BH-8400.3000)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Categorize the:
1. Need Status
2. Outcome
3. If Not Met, the Reason

Save Needs ONLY    Save ALL    Clear ALL    Cancel
Referrals

After saving the referral, you will return to the Referrals tab under Service Transactions. You will then see the referral you created listed on this tab, as seen below.
Referrals

To close a referral, click on the pencil icon to the left of the referral.

In the unlikely event that you need to delete a referral, click the trash can. You will see the message listed in the image below.
Referrals

After the referral is re-opened, select a Referral Outcome under the ‘Referral Data’ section.

Then scroll to the bottom to the ‘Need Status and Outcome’ section. Change the Need Status* to ‘Closed’ and then click Save & Exit.
Interim Reviews

To be completed at 30, 60, 90 or 120 days, after in-take.

1. On the client’s ClientPoint profile, click on the ‘Entry/Exits’ tab

2. Select the paper icon under the Interims column next to your program

3. Click ‘Add Interim Review’
Interim Reviews

Choose the Interim Review Type and enter the date of review, and select ‘Save & Continue.’

If entering for a household, make sure that the boxes are checked next to each client’s name at the top.
Update Assessment

In the pop-up window, you will see the Update Assessment (2017) is selected.

Review each section and make any necessary changes.

See example on next slide, which shows how to document changes in Monthly Income.
Update Assessment: Edit Monthly Income

This client received a job and is no longer receiving unemployment insurance.

- To record this change in unemployment insurance, click on the pencil icon to the left of the income source.

### Monthly Income

<table>
<thead>
<tr>
<th>Monthly Amount</th>
<th>Source of Income (HUD)</th>
<th>Receiving Income Source</th>
<th>Start Date *</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>US$250.00</td>
<td>Unemployment Insurance (HUD)</td>
<td>Yes</td>
<td>09/04/2018</td>
<td>10/04/2018</td>
</tr>
<tr>
<td></td>
<td>Worker’s Compensation (HUD)</td>
<td>No</td>
<td>09/04/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td>VA Service Connected Disability Compensation (HUD)</td>
<td>No</td>
<td>09/04/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td>VA Non-Service Connected Disability Pension (HUD)</td>
<td>No</td>
<td>09/04/2018</td>
<td></td>
</tr>
</tbody>
</table>
Update Assessment: Edit Monthly Income

The ‘Receiving Income Sources?’ field should **ALWAYS** be ‘Yes.’
Update Assessment: Edit Monthly Income

Enter the last date the client was receiving this Income Source in the ‘End Date’ field. If you do not know the exact date the client stopped receiving this income, use the date 1 day prior to the date of entry.
Update Assessment: Edit Monthly Income

Click ‘Save’. To add a new income source, click ‘Add’ at the bottom of the Monthly Income* section.

Fill in the Monthly Amount, the Source of Income, the Start Date and confirm the Receiving Income Source field and select ‘Save.’
Annual Assessment

Any client enrolled in a program with a length of stay longer than 1 year is required by HUD to have an annual assessment.

1. On the client’s ClientPoint profile, click on the ‘Entry/Exits’ tab
2. Select the paper icon under the Interims column next to your program
3. Click ‘Add Interim Review’
Annual Assessment

Select ‘Annual Assessment’ as the ‘Interim Review Type’.

Enter the actual date you conducted the Annual Assessment with the client in the ‘Review Date’ field. Remember, Annual Assessments must be completed within 30 days before or after the client’s anniversary date.
Annual Assessment

Just like the Update Assessment, the Annual Assessment is intended to document what benefits or programs the client has been connected to since enrolling in your program.

Review the client’s Monthly Income, Non-Cash Benefits, or Health Insurance. To change any information, refer to pages 64-67.
Exiting Clients

If you are an Emergency Shelter, Permanent Supportive Housing, or Emergency hotel voucher program continue to the next page. You will be exiting your clients through ShelterPoint.

All other programs please skip to page 77.
ShelterPoint - Exit

Return to ShelterPoint by selecting the gray ShelterPoint tab on the left side of the screen.

Select your program and unit list, and click ‘View All’ in the ShelterPoint Dashboard.
ShelterPoint - Exit

To exit a client or household from ShelterPoint, click on the Red Circle next to the date the client entered.

<table>
<thead>
<tr>
<th>Date In</th>
<th>Floor</th>
<th>Room</th>
<th>Bed</th>
<th>Hold</th>
<th>Client</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 001</td>
<td>Hold</td>
<td>EMPTY</td>
</tr>
<tr>
<td></td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 002</td>
<td>Hold</td>
<td>EMPTY</td>
</tr>
<tr>
<td></td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 003</td>
<td></td>
<td>HELD</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 004</td>
<td></td>
<td>(13978) weasley, ron</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 005</td>
<td></td>
<td>(13808) Weasley, Molly</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 006</td>
<td></td>
<td>(13977) weasley, arthur</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Floor 001</td>
<td>Room 001</td>
<td>Bed 007</td>
<td></td>
<td>(13979) weasley, ginny</td>
</tr>
</tbody>
</table>
ShelterPoint - Exit

Check the Date Out is the Exit Date. Select a response for the *Reason for Leaving* and *Destination*.

Again, if entering for a family, make sure all of the names are checked.
Complete the Exit Assessment by recording any changes in the Income, Non-Cash Benefits, and Health Insurance.

Please refer to pages 64-67 for instructions on recording a change in income.
ShelterPoint - Exit

Click ‘Save & Exit’ at the bottom of the screen. You will be directed back to the Shelter Inventory. Please note that the client or household is no longer listed in the Inventory.

You have successfully exited the client(s) from shelter.
Exit Assessment

On the client (or head of household) profile, go to the Entry/Exit category. Click on the pencil under ‘Exit Date’ next to the program you are exiting the client from.
Exit Assessment

In the ‘Edit Exit Data’ section, select the *Reason for Leaving* and the *Destination*. Hit ‘Save & Continue.’

Make sure the Exit Date is correct, and if exiting a household, make sure all of the household members have been selected by checking the box next to their name above the Edit Exit Data section.
Exit Assessment

If applicable, modify the Monthly Income, Non-Cash Benefits, Health Insurance or Disabilities.

Fill out the questions at the bottom of the assessment.

For the Assessment Disposition field, options that include the term ‘continuum’ refer to the Continuum of Care (CoC) grant.
Exit Assessment

For Households, make sure each family member is checked out. All of the household members should have green check marks, as well as the Exit Assessment (2017).
Close a Service

To close a service, go to the client’s ClientPoint profile. Under the ‘Services’ section, click on the pencil next to the start date.
Close a Service

Enter the End Date for the Service, and then scroll down.

<table>
<thead>
<tr>
<th>Service Provider *</th>
<th>Case Management (2401)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating User</td>
<td>Melanie</td>
</tr>
<tr>
<td>Start Date *</td>
<td>03 / 02 / 2017 12:35 PM</td>
</tr>
<tr>
<td>End Date</td>
<td>03 / 25 / 2017 12:00 PM</td>
</tr>
<tr>
<td>Service Type *</td>
<td>Case/Care Management (PH-1000)</td>
</tr>
</tbody>
</table>
Close a Service

Under the ‘Need Information’ section, change the **Need Status** to ‘Closed’ and select a response for the Outcome of Need.

Click Save & Exit. You will be redirected to Service Transactions. To return to the client’s ClientPoint profile, select the ‘Client Information’ tab.
Back Date Mode

It is no longer necessary for end users to enter Back Date mode in CCCIMS.

Remember that when editing an entry or exit, the effective date of the data you enter will match the time/date stamp on the Entry Assessment tab.

Any data entered will correspond with the time and date stamp shown in the upper right hand corner of the Entry Assessment tab.
All Done!

Make sure you completed all the data elements, exited the client (and all household members) from the program and that any services that the client(s) is no longer receiving are closed.