HPRP HMIS Workflow for Ohio Balance of State Providers

Task	Steps
Login	Go to http://www4.servicept.com/odod
	Insert username and password
	Check that you are entering data as the correct provider. If not, click "here" and select the correct provider.
	Check Newsflash (right sidebar) for any important updates
Create Client Profile	Click "ClientPoint"
	Search for Client in the database. If the client is found, click the client's name. If not, scroll down and click "Add Client With This Information".
	Fill in the SSN and SSN Data Quality fields. In the Profile tab.
Create Household	Click "Household Information- Click to Expand"
	If you are creating a new client, or the household makeup has changed since last episode, click "Start New Household".
	To add additional members of the household, stay in the household window, do the client search, and add each member in turn. Click "Exit and Refresh". Check that your household looks correct.
Enter Client into your program	Click "Entry/Exit" button
	Click "Add Entry/Exit", follow instructions. Select HPRP for Entry Type. Save and Close.
Complete HPRP Assessment on all hh members	Click the "Assessments" tab, click "HPRP".
	BACKDATE, if necessary. Fill in the Assessment Date, making sure it matches your Entry Date. Click "Backdate", then edit the time to match your Entry Date/Time and click "Backdate" again. This will put you into Backdate Mode. (This step is unnecessary if you are entering the data on the same day the client entered your program.)
	Answer all required fields (in red). Save work.
	Click the next member of the household (from the Household Information section) and complete that client's assessment as well.
	Continue working through the whole household until all household members have an HPRP assessment saved.
	Click on Head of Household's (HOH) profile.
	Click "Go Back to Live Mode"
Complete Service Transactions	Click the "Service Transactions" tab.
	Click the "Multiple Services" button.
	Click all members of the household and complete form, click "Save and Exit", then continue entering services in this way until you have entered all the services provided to your household.
Is your client coming back? If so, you're done. If not, continue on...	
Exit Client	Click "Entry/Exit" button.
	Click the pencil under Exit Date.
	Enter exit data for the client and check that it is automatically applying the exit to the rest of the household as well. Write down the Exit date and time.
	Click "Save and Close".
	Click "Assessments" tab.
	In the list of assessments, click "Ohio HPRP Exit".
	BACKDATE to the exit date & time if necessary, using the date/time you wrote down.
	Overwrite Housing Status field and update income data. Click "Save", click through the rest of the household members, saving this data for each of them. Don't forget to "Go Back to Live Mode".