

HPRP/HMIS Tip of the Week #8

HPRP Service Transactions in HMIS

For many who have been entering clients into HMIS for a while now, HPRP brings a new dimension to HMIS data entry. Service transactions are required for HPRP clients as these services are carefully monitored by funding entities. Because the work you do for your clients is often difficult to quantify, service transactions create lots of dilemmas and questions.

In Figure 1, you will see a screenshot of a fake client on the training site who was given rental assistance.

Client - Klein, Naomi (#42074) Release of Info: None

ENTRY/EXIT ROI RESOURCEPT CASE WORKERS SECURITY

Household Information - 1 Households - Click to Expand

Service Transactions - Services

Add Services
Multiple Services Add Need/Service

Display Options
Display All Display Needs Display Shelter Stays Display Referrals

Select Dates -Select- Start Date: End Date: Show Date Range Clear Dates

showing 1-2 of 2 (<<First <Prev | Next> Last>>)

Need Date	Service Start Date	HPRP Housing Relocation & Stabilization Service	HPRP Financial Assistance Type
06/21/2010	06/21/2010		Rental assistance
06/21/2010	06/21/2010	Case management	

showing 1-2 of 2 (<<First <Prev | Next> Last>>)

Display All Display Needs Display Shelter Stays Display Referrals Add Need/Service

Figure 1: Service Transactions tab for client 42074 on the training site.

Notice in Figure 1 under Display Options, there is a "Display All" button and a "Display Needs" button. If I clicked the "Display Needs" button, that button would then read "Display Services" and instead of seeing a list of Services below, I would see a list of Needs. "Display All" would display both types of record. There is some confusion around the difference between Services and Needs. Servicepoint automatically creates a "Need" whenever you create a Service. Whenever a Service is deleted, the corresponding Need is also deleted. It is rarely necessary to display or edit or delete Needs. For purposes of brevity, from here on, I will only talk about Services and not Needs.

The purpose of a Service transaction is to record the services you gave a client while they were in your HPRP program. Some rules of thumb about HPRP Service transactions:

1. Every client should have at least one Case Management Service transaction. This reflects the client's intake assessment. Another Case Management should be recorded for each recertification.
2. Case Management cannot be the only Service given to a client. (S/he must also have gotten either Financial Assistance or Legal or Housing Search and Placement.)

3. All members of a household should have an identical mix of Service transactions for a given entry/exit.
4. JARGON NOTICE: When I refer to Entry and Exit dates, I mean the date range the client was in your program from start to finish. When I refer to Start and End dates, I mean the date range you are required to enter for each Service transaction.
5. All Start and End dates should be for the same day within each Service transaction.
6. All Start and End dates and times in all Service transactions should fall between your Entry and Exit dates and times. The idea behind this is clients enter your program, then receive services, then they exit your program in that order. The dates & times should reflect this.
7. Every Entry/Exit (or every "episode") for a client should have Service transactions that fall within the date range of each Entry/Exit.

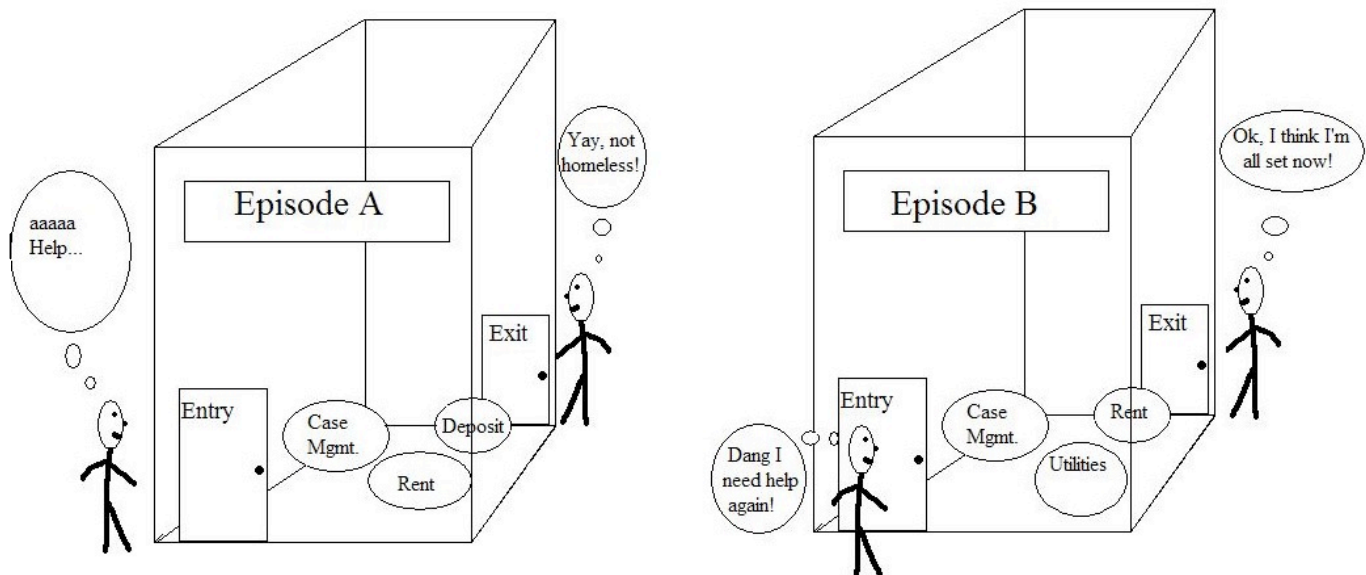


Figure 2: Conceptual demonstration of Services. Time is chronological from left to right.

In ServicePoint, Figure 2 would look like this: in the Entry/Exit area, the client would have two records. One record would give the entry date and exit date for "Episode A" and the other would give the entry date and exit date for "Episode B". The gap between the exit date of Episode A and the entry date of Episode B would be greater than a month. In the Service Transactions area, we would see six services listed: two Case Managements, two Rental Assistancess, a Deposit, and a Utilities Payment. Three of the dates would fall between the entry and exit dates for Episode A, and three of them would have dates falling between the entry and exit dates for Episode B.

For detailed descriptions of what each type of service means, I would strongly encourage you to read in the data standards pages 88 through 93. Of all the services, Case Management is the fuzziest. For clarity, it is expected that your Continuum of Care will work out the details on how your agencies will define Case Management. The baseline meaning from the state is every intake assessment and recertification assessment. Most agencies do more than this for their clients, and will want to set a standard to be followed consistently across the CoC as to what else constitutes a Case Management. As long as your definition includes all assessments (whether intake or recertification) and it is followed consistently across the CoC, the ODOD will be happy with that.

Service Transactions is where your agency records all the good work you do. Use them well! ☺

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.