



VERMONT GUIDE TO EVERYTHING HMIS

Version 1.0

Abstract

The Vermont HMIS data entry workflow guide is a comprehensive resource for users regardless of project type to assist in entering and troubleshooting the data collection process.

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REVISION HISTORY

| DATE | VERSION | DOCUMENT CHANGE |
|-----------|---------|--------------------------------------|
| 8/30/2018 | 1.0 | Initial Draft |
| 1/7/2019 | 1.0 | Added a second way to add HH Members |

SCOPE AND PURPOSE

This document provides the comprehensive workflow guides to assist the user in basic data entry as well as advanced data entry, and reporting across all funding and project types.

BASIC DATA ENTRY

SELECTING AN ENTER DATA AS (EDA) PROVIDER

1. Log into ServicePoint and click on ClientPoint
2. Locate in the upper right-hand corner the Enter Data As (EDA) text
3. Click on Enter Data As
4. Select from the pop-up list the project the client is being served under
5. Click the green circle icon to assign the project in the EDA section
6. Enter data following applicable workflow

SELECTING A BACK DATE

1. Log into ServicePoint and click on ClientPoint
2. Locate in the upper right-hand corner the Back Date text
3. Click on the Back Date
4. Use the calendar icon to change the date if needed
 - a. If entering data on the day of collection back date still needs to be used, the date used will be the current date
5. The time will always be 12:00:00 am, do not modify the time
6. Click Set Back Date
7. Enter data following the applicable workflow

CREATE A NEW CLIENT RECORD IN SERVICEPOINT

8. Log into ServicePoint and click on ClientPoint
 - a. Type in the name of the client and click search. In searching remember to check common alternative spellings or any aliases or nicknames that may have used in the past.
 - b. If a record and client number populate in the search results the client has been entered previously
9. If no results populate the client has not been entered
 - a. Choose the appropriate EDA provider and repeat the search process
 - b. If the client does not show up when previously when they did while not in an EDA provider follow the workflow for changing visibility
10. Click on Add New Client With This Information
11. Select the tile that says Add Client Only
12. Locate the Client Profile tab and click to highlight the tab
13. Click the pencil icon next to Client Record complete the data fields within each and save. Leave the Client Demographics blank
14. Complete the assessment questions making sure to answer each question
15. The four HUD verification sub assessments need to be answered fully, collecting both Yes and No responses
 - a. Click on the blue HUD verification text
 - b. Click the bubble next to the No (HUD) response at the top of the popup
 - c. Manually change any of the No responses to Yes that are applicable
16. Click Save and Exit

CREATING A HOUSEHOLD

1. After creating a new client record remain in the client record or log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally.
2. Click on the Household tab
3. Click on the black arrow to the left of the Previous Households to ensure the household members were not previously entered
4. Find and click on Start New Household this will open a client search pop up window
 - a. Type in the name of the client and click search. In searching remember to check common alternative spellings or any aliases or nicknames that may have used in the past.
 - b. If a record and client number populate in the search results the client has been entered previously
 - c. If no results populate the client has not been entered
5. Search for common misspellings and possible nicknames the client may have used
6. Click on Add New Client With This Information
7. Repeat the above steps until all household members are added

8. Click Continue
9. Assign a HoH and denote the relationship to the HoH for each member in the Household Members section at the top of the next screen
10. Complete the assessments for all household members
11. Click Save and Exit

ADDING A NEW HOUSEHOLD MEMBER TO AN EXSISTING HOUSEHOLD

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally.
2. Search for and select the household the new member will be added to
 - a. You will want to search for the Head of Household's (HoH) file to find the Household the new member belongs to
3. Select the appropriate Back Date
 - a. For adults or children born prior to the project start date select the date they joined the household or when case management was informed they joined the household as the Back Date
4. For infants born during the period the household is being served select the infant's date of birth as the Back Date
5. Go to the Household tab while in the Head of Household's (HoH) record
6. Click on Manage Household
7. Click on Add/Delete Household Members
 - a. Expand the Add Clients to the Household by clicking the black arrow to the left of the text
 - b. Type in the First and Last Name of the new household member
 - c. Click on Search
8. If the new household member has a ServicePoint record it will populate Client Results section
 - a. Confirm the client is correct and add the household member by clicking on the green circle icon
9. If the new household member does not have a record no clients will populate
 - a. Click Add New Client With This Information
 - b. Click Okay on the pop up asking that user has confirmed no other records exist for new household member
 - c. New household member's name will appear in Client Results, click on green circle icon
10. New household member will appear in Selected Clients section, if additional new household members still need to be added repeat the above steps until all are added
11. Click Continue
12. The Relationship to HoH needs to be added for the new household member and the required data entry completed. This can be done on the Household tab
13. Go to the Entry/Exit tab for the HoH
14. Click on the pencil icon next to the Start Date
15. Click Save and Continue on the pop-up window that appears
16. At the top of the next window that appears click on Include Additional Household Members
17. Uncheck every household member *except* for the newly added person(s) and change the date to date they entered the household. This is the same date as the selected Back Date
18. Save and continue
19. Confirm that new household member was added to household in the Entry/Exit tab by clicking on the magnifying glass on right most column

Alternative method for adding household member

There are instances where the above method does not work, namely when adding the new household member to the household in the Entry/Exit tab the existing household members cannot be unchecked causing the entire household entry date to change to the newest date of entry. These steps will outline how to work around this issue. The below steps are to be done *after* the new household member is added in the household tab using the steps above.

1. Backdate to the date of entry for the HoH
2. Go to the Entry/Exit tab for the HoH
3. Click on the pencil icon next to the Start Date
4. Click Save and Continue on the pop-up window that appears
5. At the top of the next window that appears click on Include Additional Household Members
6. Check off the box for the new household member
7. Save and continue
8. Click the pencil next to the Project Start Date in the Household Members Associated with this Entry/Exit
9. Change the date to the date the new household member was added in the household tab and confirm the time is 12:00:00am
10. Save and continue
11. Confirm that new household member was added to household in the Entry/Exit tab by clicking on the magnifying glass on right most column
12. Note that the new household member will now have the correct entry date.

REMOVING HOUSEHOLD MEMBER

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally.
2. Search for and select the household the new member will be added to
3. Set the Back Date for the date the household member left the household
4. Go to the Household tab while in the Head of Household's (HoH) record
5. Click on Manage Household
6. Identify the household member that is to be exited
7. Click on the red circle icon to the left of their name
8. Confirm the Date Client Left Household matches the Back Date and click Save
9. Go to the Entry/Exit tab for the client being exited
10. Click on the pencil icon and confirm all members of the household are unchecked expect for the household member leaving
11. Select a Reason for Leaving, Destination, and Save.

Please note the exited household member will continue to show up in the Total Client Count.

UPDATE AND ANNUAL ASSESSMENT(S)

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally
2. Select the appropriate Back Date
 - a. Annual Assessment is the yearly anniversary date of when the HoH entered the project
 - b. Update assessment is the date of significant change(s) to the client or household data. Examples of changes could be:
 - i. HUD Sub Assessments: Change to Income, Health Insurance, Non-Cash Benefits and/or Disabilities
 - ii. Move In Date

- iii. Chronic Homeless Status
3. Go to the Entry/Exit Tab
4. Click on the Interim icon that corresponds to the EDA provider selected
5. Click Add Interim Review
6. Confirm the entire household is included by checking each checkbox
7. Select the Interim Review Type
 - a. Annual Assessment is the yearly anniversary date of when the HoH entered the project
 - b. Update assessment is the date of significant change(s) to the client or household data. Examples of changes could be:
 - i. HUD Sub Assessments: Change to Income, Health Insurance, Non-Cash Benefits and/or Disabilities
 - ii. Move In Date
 - iii. Chronic Homeless Status
8. Confirm the Review Date matches the Back Date and date of desired update
9. Save and Continue
10. Annual Assessments are required to be entered even if there are no changes to the client record. If there are no changes, scroll to the bottom of the page and save and exit. Please go to next step if there are changes to the file.
11. To update the data entered in the initial assessment for one of the four HUD sub assessments
 - a. Click on the magnify glass to view the entire list of entries for each respective HUD sub assessment
 - b. Use the blue headers at the top of each column to sort the data. It is helpful to sort by Provider, Receiving Benefit, Source, or Covered
 - c. Click on the pencil icon for the data entry needing to be changed
 - d. Leave the previously entered data as is and enter and end date in the space provided
 - i. The End Date will always be for the day before the Back Date (ex. Back Date is 9/5/20XX the End Date is 9/4/20XX)
 - e. **Do not change the Receiving Benefit from the original entry**
 - f. Click Save
 - g. Create a new record for benefit that was just ended following the previous steps by clicking the Add button on the bottom left.
 - h. Select the benefit type, and choose if the household is receiving benefit by selected yes or no
 - i. The start date will automatically populate and match the date of Back Date
 - j. No end date is required leave this section blank
 - k. Answer any required assessments that are applicable
 - l. Save and exit
12. Change the Yes/No question found above the HUD assessment if needed, it should be in agreement with the HUD sub assessment(s)
13. Scroll to bottom on page to save the update

ADDING A SERVICE TRANSACTION

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally
2. Select the appropriate Back Date
3. Search for and select the household that the service transaction will be added to
4. Click on the Service Transaction Tab
5. Click the Add Need tile

6. Click Save & Continue
7. Include everyone in the household by clicking the checkbox next to the household type or each household member
8. The provider automatically populates and will match the EDA selected previously
9. Using the drop-down menu to select the type of need desired
10. The date of need automatically populates and will match the Back Date selected previously
11. Click Save and Continue
12. Click the Add Service icon
13. The Service Provider, Creating User, Start Date, and End Date are all populated automatically
14. Click the blue text Make Service same as Need to match the service type selected initially
15. Leave Provider Specific Service as Select unless EDA provider is funded by SSVF, RHY, or PATH
16. Click Save and Continue
17. ****Optional**** Add service notes or case notes in the provided Service Notes text box
18. Scroll to the bottom of the page and change the Need Status to closed
19. ****Optional**** choose Outcome that best applies
20. Save & Exit

UPDATE ENTRY PROVIDER

1. Log into ServicePoint and select the Enter Data Provider (EDA) that will become the provider for the household
2. Back Date to the start date of the program entry needing the update
3. Search for and select the household that the service transaction will be added to
4. Click on the Entry/Exit tab
5. Click the pencil icon next to the entry date that needs the provider fixed
6. Include everyone in the household by clicking the checkbox next to the household type or each household member
7. Click Save and Continue
8. At the top of the pop up find the provider and using the drop-down menu select the correct provider
9. Click update
10. Scroll down to the bottom of the pop up and click Save and Exit

UPDATE ENTRY TYPE

1. Log into ServicePoint and select the Enter Data Provider (EDA) that will become the provider for the household
2. Back Date to the start date of the program entry needing the update
3. Search for and select the household that the service transaction will be added to
4. Click on the Entry/Exit tab
5. Click the pencil icon next to the entry date that needs the provider fixed
6. Include everyone in the household by clicking the checkbox next to the household type or each household member
7. Click Save and Continue
8. At the top of the pop up find the provider and using the drop-down menu select the correct type
9. Click update
10. Scroll down to the bottom of the pop up and click Save and Exit

HOUSING MOVE IN DATE

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to enter the household
2. Back Date to the date household *physically* moved into housing
3. Search for and select the household that the move in date will be added to
4. Go to the Entry/Exit tab
5. Click on the interims icon
6. Click Add Interim Review and select update as type
7. Locate the housing move in date data field at the top of the interim assessment and add move in date
8. Repeat the pervious step for each household member
9. Save and Exit

HOUSEHOLD EXIT DATES

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to enter the household
2. Back date to the appropriate exit date
 - a. Rapid Rehousing and Permanent Supportive Housing use last day of the month of which the household exited (ex. Household exits project on September 5th, backdate to September 30th)
 - b. Other projects back date to the date the household exited, this date needs to be at least one day after
3. Search for and select the household that the move in date will be added to
4. Go to the Entry/Exit tab
5. Click on the pencil icon next to the exit date column
6. Provide an exit for leaving using the drop down menu
7. Provide a destination using the drop down menu
8. Save and Continue

ADDING REFERRALS

1. Log into ServicePoint and select the Enter Data Provider (EDA) that will be making the referral
2. Backdate to the date of the referral
3. Search and select the household that the referral will be made for
4. Go to the Service Transactions tab
5. Find and select the Add Referrals tile
6. Select the Housing/Shelter in the Service Code Quick list
7. Click Add Terms
8. Select the Provider that the household is being referred to using the drop-down menu
9. Click Add Provider
10. Scroll down the page to the Referral Box
11. Confirm Referred to Provider is correct and the check the box that corresponds with the needs assignment
12. Save all
13. Email and or call the referred to agency or designated point of contact with the client ID

SHELTER STAYS

CREATING A SHELTER STAY

1. Log into ServicePoint and select the Enter Data Provider (EDA) that corresponds with the shelter the household will be staying
2. Back Date to the date the household entered the shelter
3. Enter the required data assessments found on the client profile
4. Add any household members that may need to be included
5. Go to the Entry/Exit tab and create a start date by clicking on Add Entry/Exit
6. Cancel out of Back Date and click on the ShelterPoint on the left-hand side of the page
7. The shelter provider will automatically populate with the same shelter that was selected initially in step one, confirm the provider is correct
8. The unit list may have more than one option choose the list that reflects where the household will be staying
9. The type of shelter will populate automatically
10. Click the Check Client In icon
11. Check HoH into shelter by finding an empty shelter bed. This will be evident the green circle icon on the left-hand column or in the column with the heading Client it will state EMPTY
12. Click on either the green circle icon or EMPTY to add the HoH into shelter
13. Enter the first and last name of the HoH or the Client ID and click Search
14. Click the green circle icon
15. ShelterPoint does not use Back Date, if needed manually change the date in to the same date and the entry date that was created in ClientPoint. These dates must match
16. If other clients are part of the household include them in the stay by clicking the checkbox next to each client's name
17. Click Assign Unit for each additional household member
18. Save and Exit

EXITING A HOUSEHOLD FROM SHELTER

1. Log into ServicePoint and select the Enter Data Provider (EDA) that corresponds with the shelter the household is staying
2. Back Date to the date the household exited shelter
3. Search for or enter the Client ID and access the HoH
4. Go to the Entry Exit tab and create an exit for the shelter stay by clicking on the pencil icon and answer the reason for leaving and destination
5. Cancel out of Back Date and click on the ShelterPoint on the left-hand side of the page
6. Click the View All icon and locate the HoH click the red circle icon
7. Manually correct the date out to reflect the date the household left shelter
8. Include any additional clients in the household by clicking the checkboxes next to their names
9. Save and Exit

ADDING A HOUSEHOLD MEMBER TO A SHELTER STAY

1. Log into ServicePoint and select the Enter Data Provider (EDA) that was used to create the household originally.
2. Do not select a Back Date
3. Search for and select the household needing a shelter stay change or update
4. Working in the HoH's profile go to the Service Transactions tab
5. Click on the tile named View Entire Service History
6. Find and click on the magnifying glass for the shelter stay a household member needs to be added to
7. On the bottom left, click the Edit Shelter Stay button
8. Click the Check In Additional Family Members button
 - a. Click the check box next to the household member(s) needing to be added to the stay
 - b. Manually change the date in to reflect when the household member joined the shelter stay, this can be the same day or later from the HoH's start date
9. ****Optional**** Click on Assign Unit to change the bed the household member was placed in
10. Save and exit

REPORTING

RUNNING THE COC APR

1. Log into ServicePoint and select the Enter Data As (EDA) provider that APR needs to be run for
2. From the Home Page Dashboard click on Reports on the left-hand side of the screen
3. Click on the CoC-APR tile
 - a. Set the reporting options
 - b. The Provider Type should already be defaulted to Provider, this can remain as it
 - c. The Provider will match the provider selected when the EDA was selected. The report is designed to be run while in EDA
 - d. The Program Date Range for submission will be for a full year, refer to t
 - e. Select This Provider Only
 - f. The Entry/Exit type will be HUD
4. Once you have all the information entered click Build Report
5. Download the report by clicking the Download button
6. The report will download as a CSV file. Do not open the report
7. Find the report in the download folder on the computer and move location of report to a reporting specific folder or where reports are typically stored
8. Optional but recommended is changing the name of the file for ease of locating

RUNNING THE ESG CAPER

1. Log into ServicePoint and select the Enter Data As (EDA) provider that APR needs to be run for
2. From the Home Page Dashboard click on Reports on the left-hand side of the screen
3. Click on the CoC-APR tile
 - a. Set the reporting options
 - b. The Provider Type should already be defaulted to Provider, this can remain as it
 - c. The Provider will match the provider selected when the EDA was selected. The report is designed to be run while in EDA
 - d. The Program Date Range for submission will be for a full year, refer to t
 - e. Select This Provider Only

- f. The Entry/Exit type will be HUD
4. Once you have all the information entered click Build Report
5. Download the report by clicking the Download button
6. The report will download as a CSV file. Do not open the report
7. Find the report in the download folder on the computer and move location of report to a reporting specific folder or where reports are typically stored
8. Optional but recommended is changing the name of the file for ease of locating
9. The CSV file will then be uploaded to SAGE following the prompts provided

COC APR DATA CLEAN UP

1. Run the CoC APR
2. The report will flag the errors in the columns or rows stating Client Doesn't Know/Client Refused, Information Missing, or Data Issues
3. Clicking on the blue numbers (corresponding to the number of errors for each data element) in the cells in the column or row will show the client's name and ID number needing correction
4. Highlight and copy the name(s) of the clients and paste them in a blank Excel workbook, note which data element error next to the name to make clean up easier. Repeat this for each data section
5. Sort the Excel spreadsheet by client ID number and make appropriate corrections

ESG CAPER DATA CLEAN UP

1. Run the ESG CAPER
2. The report will flag the errors in the columns or rows stating Client Doesn't Know/Client Refused, Information Missing, or Data Issues
3. Clicking on the blue numbers (corresponding to the number of errors for each data element) in the cells in the column or row will show the client's name and ID number needing correction
4. Highlight and copy the name(s) of the clients and paste them in a blank Excel workbook, note which data element error next to the name to make clean up easier. Repeat this for each data section
5. Sort the Excel spreadsheet by client ID number and make appropriate corrections

DATA QUALITY AND COMPLETENESS REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the icon named Public Folder
5. Click on the black arrow next to the icon named ICA Reports
6. Click on the black arrow next to the icon named Data Quality and Completeness Reports

7. Locate in the list of available reports the report named Data Completeness by User – Entry Exit Bases – 2017 Data Standards or most recent year
8. Click the magnifying glass and click View Report
9. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - b. Provider name—Select the provider(s) the report is being run for
 - i. Use the scroll bars to find the provider or use the search bar directly below and click binoculars icon to search
 - c. CoC—Leave blank
 - d. EDA Provider—Leave blank
 - e. Beginning of Report Period—Select the date that the report data will start with
 - f. End of Report Period—Select the date that the report data will end plus one day
 - g. Program Type—This is defaulted to include all program types, leave as is
 - h. EDA Provider—Leave blank
 - i. Enter effective date—This date will match the date of the end date entered previously
10. Click Run Query
11. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner
12. Select Save to my computer as and then select Excel or Excel 2007
13. Review data and make any required corrections in ServicePoint
14. Run 24 hours later to confirm corrections were made accurately

DATA QUALITY CALENDAR FOR EMERGENCY SHELTER REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the folder icon named Public Folder
5. Click on the black arrow next to the folder icon named ICA Reports
6. Click on the black arrow next to the folder icon named Data Quality and Completeness Reports
7. Locate in the list of available reports the report named Date Quality Calendar for Emergency Shelters
8. Click the magnifying glass and click View Report
9. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - a. Enter Provider(s)— Select the provider(s) the report is being run for
 - i. Use the scroll bars to find the provider or use the search bar directly below and click binoculars icon to search
 - b. Enter Report Start Date— Select the date that the report data will start with
 - b. Enter Report End Date PLUS 1 Day— Select the date that the report data will end plus one day
 - c. Enter COC(s)—Leave blank
 - d. EDA Provider—Leave blank
10. Click Run Query
11. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner

12. Select Save to my computer as and then select Excel or Excel 2007
13. Review data and make any required corrections in ServicePoint
14. The Client Detail tab will show the clients entered under the reported provider
15. Each client ID will be listed twice first for the entry in the entry/exit tab and the second for the entry into shelter via ShelterPoint
 - a. Confirm both entries are for the same date
 - b. If only one entry appears for a client there is a missing entry or shelter stay, the service type is shown in the right most column
 - i. Correct the missing data
16. Run 24 hours later to confirm corrections were made accurately

HOUSING MOVE IN DATE COMPLETENESS REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the icon named Public Folder
5. Click on the black arrow next to the icon named ICA Reports
6. Click on the black arrow next to the icon named Housing Move in Date Completeness Reports
7. Locate in the list of available reports the report named Data Completeness by User – Entry Exit Bases – 2017 Data Standards or most recent year
8. Click the magnifying glass and click View Report
9. Complete the prompts as follows
 - a. EDA Provider—
 - b. First day of reporting period—
 - c. Last day of reporting period—
 - d. Local CoC code—
 - e. EDA provider—
 - f. Program type code—
 - g. EDA provider—
 - h. Entry exit provider ID in list—
 - i. EDA provider--

SUB ASSESSMENT ERRORS REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART

- b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the icon named Public Folder
5. Click on the black arrow next to the icon named ICA Reports
6. Click on the black arrow next to the icon named Data Quality and Completeness Reports
7. Locate in the list of available reports the report named Data Completeness by User – Entry Exit Bases – 2017 Data Standards or most recent year
8. Click the magnifying glass and click View Report
9. Complete the prompts as follows

HOP PERFORMANCE REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the folder icon named Public Folder
5. Click on the black arrow next to the folder icon named HOP Reports
6. Locate the report HOP Performance Measures w/ Clients Level Data Detail
7. Click on the magnifying glass and click View Report
8. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - b. Report End Date PLUS ONE DAY—The end of the reporting period plus one day
 - c. Report start date—The start of the reporting period
 - a. Enter Provider(s)— Select the provider(s) the report is being run for
 - i. Use the scroll bars to find the provider or use the search bar directly below and click binoculars icon to search
 - b. EDA Provider—Leave blank
 - c. Enter value(s) for Entry Exit Provider Program Type Code—Leave blank
 - d. EDA Provider—Leave blank
 - e. Entry Exit Types—Leave blank
 - f. EDA Provider—Leave blank
17. Click Run Query
18. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner
19. Select Save to my computer as and then select Excel or Excel 2007
20. Review data and make any required corrections in ServicePoint
21. Run 24 hours later to confirm corrections were made accurately
22. Submit to respective point of contact at state level

FAMILY SUPPORTIVE HOUSING REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the folder icon named Public Folder
5. Click on the black arrow next to the folder icon named ICA Reports
6. Click on the black arrow next to the folder icon named Family Supportive Housing Reports
7. Locate the report FSH Measures Report v5
8. Click on the magnifying glass and click View Report
9. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - a. Enter value(s) for entry Exit Provider Id— Select the provider(s) the report is being run for
 - i. Use the scroll bars to find the provider or use the search bar directly below and click binoculars icon to search
 - b. EDA Provider—Leave blank
 - c. Fiscal Year Start Date—The start of the fiscal year is July first, select the applicable year
 - d. Last Date of Quarter PLUS ONE DAY—The last day of quarter for the reporting period being reported on plus one day
 - e. Last Date of Quarter—The last day of the quarter of the reporting period for the reporting timeframe
 - f. First Day of This Quarter—The first day of the quarter of the reporting period for the reporting timeframe
 - g. Show Client Names—This is defaulted to NO, change the no to YES for in agency use. Names of clients are not to be submitted to the funder or shared outside of the respective agency
 - h. EDA Provider—Leave Blank
10. Click Run Query
11. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner
12. Select Save to my computer as and then select Excel or Excel 2007
13. Review data and make any required corrections in ServicePoint
14. Run 24 hours later to confirm corrections were made accurately
15. Submit to respective point of contact at state level

BALANCE OF STATE COORDINATED ENTRY MASTER LIST REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the folder icon named Public Folder

5. Click on the black arrow next to the folder icon named ICA Reports
6. Click on the black arrow next to the folder icon named Coordinated Entry Report
7. Click on the black arrow next to the folder icon named Balance of State CE Reports
8. Locate the report BOS Coordinated Entry Report Draft v1.3.1
9. Click on the magnifying glass and click View Report
10. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - b. Enter effective date—The date the report is being pulled or generated
 - c. Choose Prioritization-- Select the local CoC sharing group provider
 - i. Use the scroll bars to find the provider or use the search bar directly below and click binoculars icon to search
 - d. EDA Provider—Leave blank
 - e. Flag new Clients After This Date—Enter the date the report was previously generated, this should correspond with the dates of the respective local housing meetings
 - f. Show Client Names—This is defaulted to NO, change the no to YES for in agency use. Names of clients are not to be submitted to the funder or shared outside of the respective agency
 - g. EDA Provider—Leave Blank
11. Click Run Query
12. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner
13. Select Save to my computer as and then select Excel or Excel 2007
14. If client names were included on report, ensure any electronic transmission or printed reports are handled in a manner consistent with safeguarding personally identifiable information (PII)

BURLINGTON/CHITTENDEN COC COORDINATED ENTRY REPORT

1. To run this report, you must have access to the Advanced Reporting Tool (ART)
2. Log into ServicePoint
3. Connect to ART using one of the two methods below
 - a. Click on the Reports button found on the left-hand side and then scroll to the bottom on the page and click on the tile named ART
 - b. Click on Connect to ART found in the upper right-hand side of the Homepage dashboard under the Back-Date link
4. Click on the black arrow next to the folder icon named Public Folder
5. Click on the black arrow next to the folder icon named ICA Reports
6. Click on the black arrow next to the folder icon named Coordinated Entry Report
7. Click on the black arrow next to the folder icon named Chittenden CE Reports
8. Locate the report CE Report Beginnings, Master with Family Groups
9. Click on the magnifying glass and click View Report
10. Complete the prompts as follows
 - a. EDA Provider—Leave blank
 - b. Enter effective date-- The date the report is being pulled or generated
 - c. Choose Prioritization—Leave as the default response Chittenden Coordinated Entry (1517)
 - d. EDA Provider—Leave blank
 - e. Day BEFORE last Report Run for Committee—Enter the date for the last time the report was run less one day
11. Click Run Query

12. Download report as an Excel document by clicking on the Document tab in the upper left-hand corner
13. Select Save to my computer as and then select Excel or Excel 2007

