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# HMIS Support Manual - Using HMIS for PATH Reporting

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**Summit County, Ohio  
Homeless Management Information System**



## HMIS & PATH

Each individual that you work with in a meaningful way whether they are eligible for PATH or not, should be entered into ServicePoint. It is important *not* to use the 'unknown' in the drop down boxes for accurate data. Below are instructions on how to enter data into HMIS so that your agency's data will be reflected correctly in the PATH Report. There are two sections depending on whether you enter data for a person who is not enrolled in PATH and the second section is for clients who you enroll in the program.

### Login to ServicePoint

Establish your internet connection. Type the following web address to access the Login website.

<https://hmisummit.servicept.com>

Type your ServicePoint User Name and Password, then click the Login button

**SERVICEpoint™**  
Connecting your community.

**Akron Info-Line**

User Name

Password

Login

Forgot your username or password?  
Contact your agency administrator

System use requires your compliance  
with the [terms and conditions](#).

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**Note:** All transactions you complete while logged in the system are being recorded within your user profile. It is important you do not share your Logon ID or password with anyone else in your office, you will be held responsible for all transactions completed under your own ID. Your agency HMIS Administrator will be able to run a report to see all transactions completed by each user profile.

After completing the login, the screen on the next page will display.

The screenshot shows the ServicePoint Home Page Dashboard. At the top left, it displays the installation name 'Akron Info-Line' and provider 'H.M. Life Opportunity Services' with the date 'March 21, 2013'. The top right corner shows the user 'Mary Jane Benko' (System Admin II) and a 'Mode' dropdown set to 'Shadow kstambaugh', along with buttons for 'Enter Data As', 'Back Date', and 'AGIT Connecting'. A search bar is located below the user information. The main dashboard area is divided into three sections: 'System News (12)', 'Agency News (0)', and 'Follow Up List (0)'. The 'System News' section contains a table with columns for 'Date' and 'Headline'. The 'Follow Up List' section is currently empty. On the left side, there is a navigation box with tabs for 'Home', 'ClientPoint', 'ResourcePoint', 'ShelterPoint', 'SkamPoint', 'Reports', 'Admin', and 'Logout'. A 'Legal Notices' section is visible at the bottom of the page.

The top left hand side of this screen (1) indicates the name of your ServicePoint installation, the current date and the name of your provider.

Below this is a colored heading that indicates the module you are viewing. In this case, the Home>Main Dashboard (2).

Below this are a series of tabs in a navigation box (3). Which tabs appear on your screen depends on the settings established by the administrator who set up your account. Each of these tabs is a link to one of the various modules of *ServicePoint*. Arrows next to a tab, such as in Reports and Admin, indicate that the tab expands to show additional subsections.

To the right of the navigation box is the **ServicePoint News** box, the **Agency News** box, and the **Follow Up List** box (4).

System Administrators can post news for agencies in the Agency News box. The Follow Up List box includes a list of clients who have projected follow-up dates noted in their file.

## Logging onto your Provider Program

Before entering a client or searching for a client in ServicePoint, you will want to log onto the correct program. To change your provider, click “**Enter Data As**” in the upper right corner of your screen (5). The **Provider Search Results** screen will display. Click the green plus sign next to the program name you would like to enter data as.

Provider Search Results																											
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider												Level	Phone	Location	Last Updated											
		D Grant Vouchers (CSS) (99)											Level 3	330-253-9388	Unknown	03/29/2012											
		HGrant Vouchers (CSS) (25)											Level 3	Unknown	Unknown	05/11/2012											
		Homeless Outreach Program (CSS) (26)											Level 3	330-253-9388	Unknown	08/10/2012											
		Housing Assistance Program-HAP (CSS) (100)											Level 3	330-253-9388	Unknown	01/19/2012											
		JGrant Vouchers (CSS) (68)											Level 3	330-253-9388	Akron, OH 44311	04/04/2012											
		NCCH - South Street Site (81)											Level 3	Unknown	Akron, OH 44311	04/04/2012											
		North Coast Community Homes - Waterloo Site (24)											Level 3	Unknown	Unknown	04/04/2012											
		Safe Haven - (CSS) (22)											Level 3	330-253-9388	Unknown	01/07/2013											
		SGrant Vouchers (CSS) (21)											Level 3	330-253-9388	Unknown	05/11/2012											
		TRP (CSS) (70)											Level 3	330-253-9388	Akron, OH 44311	01/19/2012											

## Entering Client Into ServicePoint

1. Make sure you have changed to your PATH provider by clicking on “**Enter Data As**” in the ServicePoint header.
2. Backdate to the date you or your agency collected the information about the client. To back date click on “**Back Date**” in the ServicePoint header and change the date. The header will change to a bright yellow to indicate you are in back date mode. You only need to be in back date mode when you enter profile information that you collected on previous dates.
3. Click on **ClientPoint** in the left sidebar.
4. The search screen will automatically load.

### Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Alias	<input type="text"/>			
Social Security Number	<input type="text"/>	-	<input type="text"/>	-
Social Security Number Data Quality	-Select-			
Exact Match	<input type="checkbox"/>			

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### Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

5. Search for the client by entering their name, SS# and SS# Data Quality. If there are no possible matches , click on the **Add New Client With This Information** button to add the client.
6. The **PATH** assessment will display

### Client - (110) Lacy, David

(110) Lacy, David  
Release of Information: None

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

#### Client Record

Name	Lacy, David
Alias	
Social Security	641-61-6464
SSN Data Quality	Full SSN Reported (HUD)
Age	

#### Client Demographics

Date of Birth *	
Date of Birth Type *	
Gender *	
Primary Race *	
Secondary Race	
Ethnicity *	

PATH

**Date of Birth \*** [MM/DD/YYYY] [G]

**Date of Birth Type \*** -Select- [G]

**Primary Race \*** -Select- [G]

**Secondary Race** -Select- [G]

**Ethnicity \*** -Select- [G]

**Gender \*** -Select- [G]

**Housing Status \*** -Select- [G]

**U.S. Military Veteran?** -Select- [G]

**Type of Prior Living Situation** -Select- [G]

**Length of Stay (at Prior Residence)** -Select- [G]

**Zip Code of Last Permanent Address** [G]

**Zip data quality** -Select- [G]

**Domestic violence victim/survivor** -Select- [G]

**Extent of Domestic Violence** -Select- [G]

**Income received from any source in past 30 days? \*** -Select- [G]

**Monthly Income**

Last 30 Day Income	Source of Income	Start Date *	End Date
Add	View Gross Income		

**Non-cash benefit received in past 30 days? \*** -Select- [G]

**Non-Cash Benefits**

Amount of Non-Cash Benefit	Source of Non-Cash Benefit	Start Date *	End Date
Add			

**Do you have a disability of long duration? \*** -Select- [G]

**Disabilities**

Disability Type
Add

**First contact or re-entry only**

**Housing Status** -Select- [G]

**Is Client Homeless?** -Select- [G]

**Is Client Chronically Homeless?** -Select- [G]

**How was client contacted?** -Select- [G]

**Length of time outdoors or in short term shelter** -Select- [G]

**Principal Mental Illness Diagnosis** -Select- [G]

**Co-Occurring Substance Abuse?** -Select- [G]

**IS Client Ineligible for Path Enrollment?** -Select- [G]

**PATH Enrollment Ineligible Reason** -Select- [G]

Cancel

**Client Notes**

Provider	Note Date	Note Preview	Full Note
Add New Client Note	Print	No matches.	

**File Attachments**

Date Added	Name	Description	Type	Provider	Added From
Add New File Attachment	No matches.				

**Incidents**

Ban Start	Ban End	Incident	Ban Code	Provider	Site	Staff
Add New Incident	No matches.					

Save Save & Exit Exit

7. Complete the assessment. If you don't have the information at this time, you can always update it at a future time. PLEASE AVOID UNKNOWN as the answer in the drop downs as much as possible
8. To be included in the Path Report the Path Assessment must include:
  - a. How the client was contacted must be answered as "Outreach".
  - b. Is the client homeless must be answered "Yes".

- c. The housing status must be either “**literally homeless**” or **Imminently Losing their Housing**”.
- d. A principal mental illness must be documented.