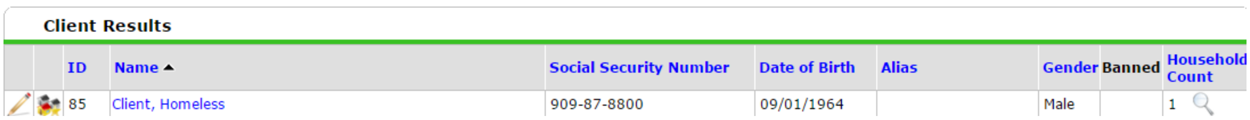
STREET OUTREACH WORKFLOW

Bowman Systems recommends the following workflow for Street Outreach data entry into ServicePoint. Complete data entry will maximize the reporting capability for the HUD CoC APR and any other required reports as well.

Initial Meeting with Client

This is the initial point of contact with the potential client. In essence it involves capturing the client's basic information before they officially enter the project.

- **Step One: Create Client Profile**
  - Make sure to search for the client to insure they don't already exist first prior to creating client profile. If client already exist click the pencil next to the client's name to go into client's record. (See Figure 2)



Client Results

		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		85	Client, Homeless	909-87-8800	09/01/1964		Male		1

Figure 2

  - If necessary go into backdate mode.
  - Then enter profile information. See *ClientPoint Workflow*, for instructions to create a household, if necessary.

- **Step Two: Obtain and Record ROI** (Optional)
  - Click on the **ROI** tab and click **Add Release of Information** to generate an ROI. (See Figure 3)

Figure 3

- **Step Three: Create Project Entry**
  - Record **Entry Date** with the same date as the First Date of Contact.
  - Project Entry Type should be **HUD**. (See Figure 4)

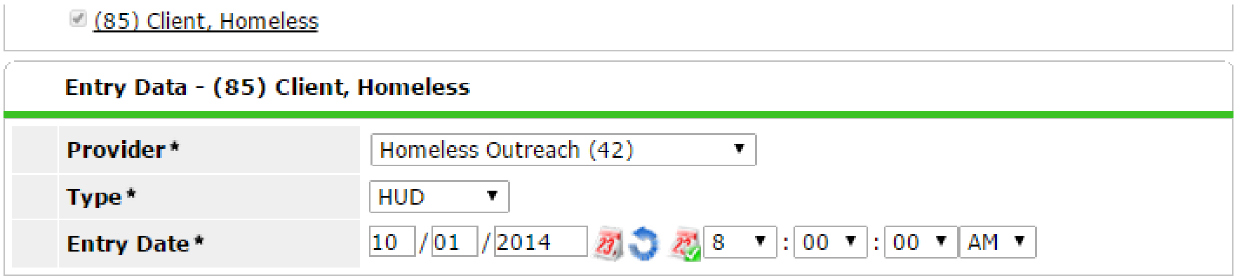


Figure 4

- Time stamp of project Entry Date must be prior to first date of contact for the contact to be counted correctly.
- Record all known **Universal Data Element**'s at project entry.
- Make sure to record the first **Date of Contact** information. (See Figure 5)

Figure 5

Update Client's Information as relationship develops

As the Outreach Worker's relationship with the client develops, the user can update the client's profile with data elements as they become available. Include all Contacts with the client in this process. It may be beneficial to use the Entry Assessment at Update to include all of the Entry questions for this process. Contacts should be recorded up until the point the client becomes engaged with the Outreach Worker.

- **Step Four: Create an "Update" using Interim Reviews**
  - To add an updates, click **Interims** for the existing project entry. (See Figure 6)

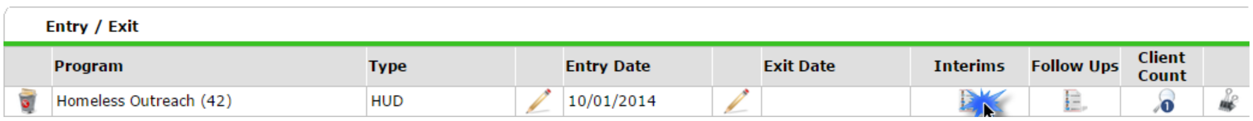


Figure 6

  - **Add Interim Review** and then choose **Update** type.

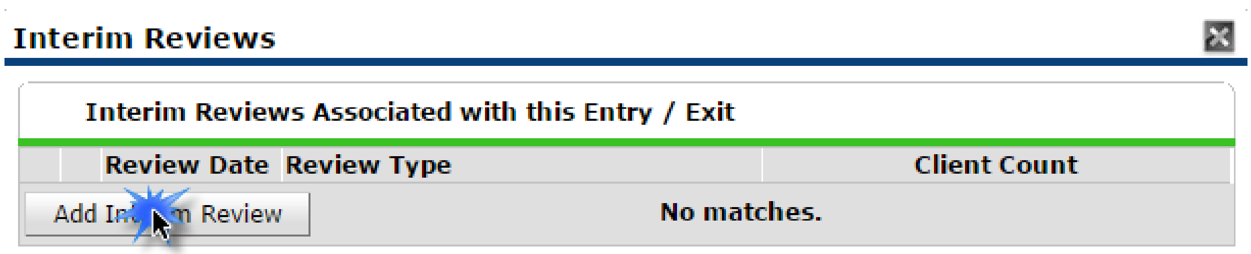


Figure 7

  - The user should add additional Contacts using the **Outreach** sub-assessment, and update other data elements as required. (See Figure 8)

Figure 8

At this point the user may do the following:

1) Repeat **Step 4** using the Interim Review type of **Update** to record additional Contacts with the client for every contact after the initial contact and updating client information. This process continues until the client reaches the Engagement stage.
2) The user may create service transactions, if applicable. See alternative **Step 5**.
3) Once the client is Engaged with the Outreach Worker, continue to **Step 6**.

Provide and document Services for the client

Service transactions records and additional information can be added at any time after the client has entered the project before the client had exited the project. For example, the Outreach Worker can create an outreach service to track the service provided to the client.

- **Step Five: Create Service Transactions**
  - To create a service, do the following while in the client record.
  - On the **Service Transactions** tab select **Add a Service** to access the service transaction screen. (See Figure 9).

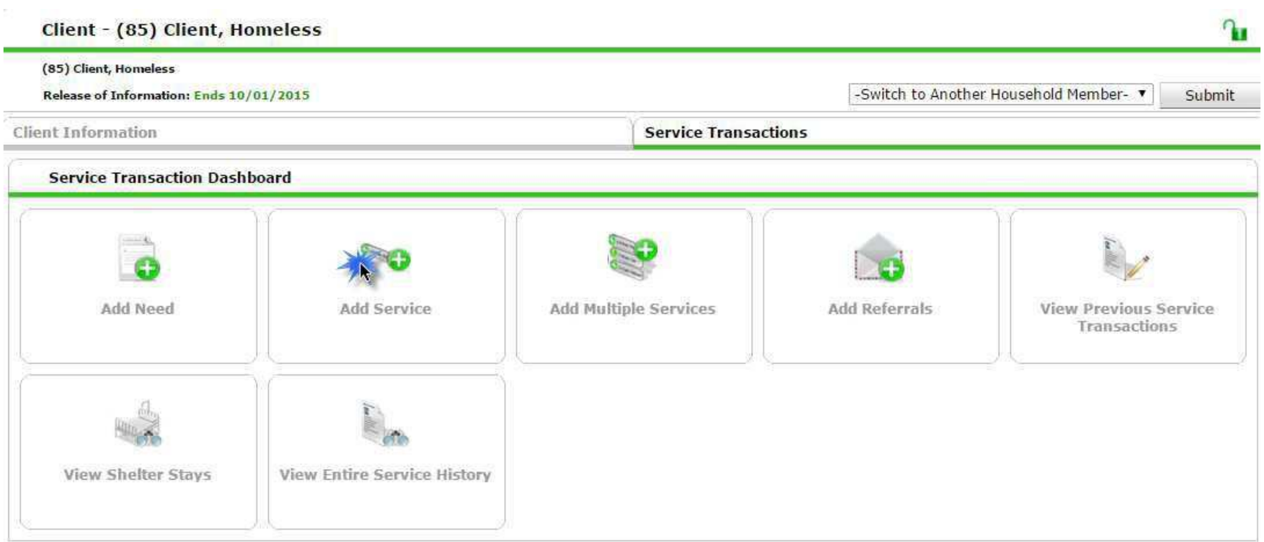


Figure 9

  - Remember to choose the proper street outreach project. Enter a **Start Date** for the Service and select the **Service Type** from the drop-down picklist. (See Figure 10)

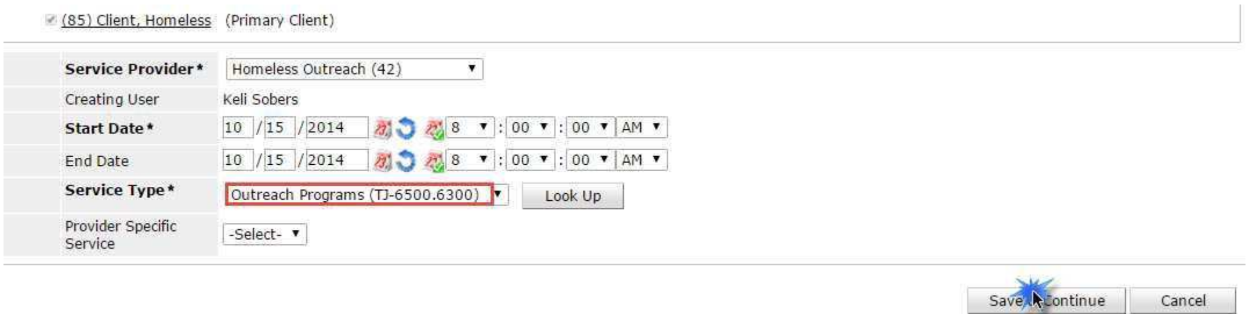


Figure 10

- The result of the service transaction should look like Figure 11 below.

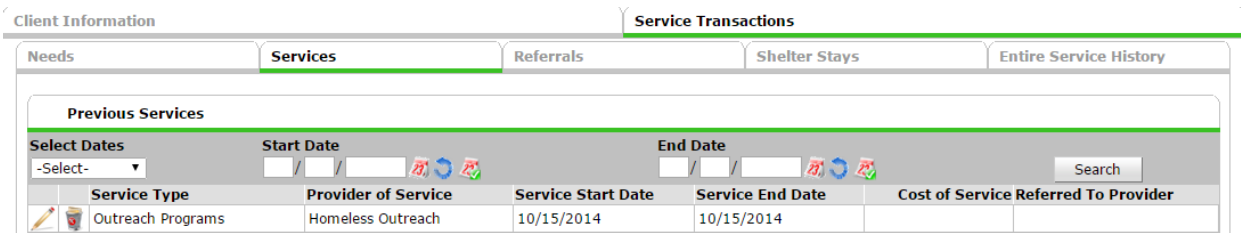


Figure 11

Client Engaged in Project

Overtime the Outreach Worker and client develop a relationship that leads to an Engagement. Once the client has formally agreed to work with the Outreach Worker then a Date of Engagement can be recorded.

- **Step Six: Create "Update" to record Engagement**
  - At this point the user will need to go back into the Interim review and input the **Date of Engagement**. (See Figure 12)

Figure 12

  - The user will also need to record a **Date of Contact** for the same date. (See Figure 13)

Figure 13

VERSION HISTORY

Client Exit from the Project

An Exit is created once the client is either not engaged in the outreach project or once the client is housed or declines further services.

- **Step Seven: Create Exit record**
  - Make sure to close any open services.
  - Create an **Exit** for the appropriate project Entry by clicking on the pencil. (See Figure 14)

Figure 14

  - Make sure to indicate the appropriate **Reason for Leaving** and **Destination**.
  - Complete all required updates and elements.
  - Be sure to check sub-assessment records for valid types/dates.

WORKFLOW CHECK LIST

- ✓ Create client profile, if client doesn't already exist in system
- ✓ Obtain and record ROI (if applicable)
- ✓ Record Project Entry Date with the same date as the First Date of Contact, record all known UDE's at project entry; Timestamp of project entry must be prior to first date of contact for the contact to be counted correctly.
- ✓ Record services, if applicable
- ✓ Record subsequent contacts with client; add UDEs as they become available
- ✓ Record final contact with client on same date as Date of Engagement; timestamp of final contact must be recorded before Date of Engagement timestamp to avoid missing location contact error.
- ✓ Record Project Exit