

What is a Household in ServicePoint?

It's usually a family that is enrolled/entered into a project together receiving services as a group. There are various types: Single Parent, Couple with No Children, etc. A household always includes a Head of Household and at least one other household member who are entering your program together.

How to add a New Household

This is used to create an entirely new household that does not yet exist in ServicePoint

- 1) Get started.
 - a. Logon with your username and password.
 - b. Check the program you are logged on to. If it's correct, continue.
 - i. – OR – Click the Enter Data As link to change to the correct program.
 - c. Set the Back Date to be the same as the client entry date.
- 2) To find the head of the household
 - a. Click on *ClientPoint* at the left
 - b. Enter the client's First and Last Name and SSN to search for him/her.
 - i. – OR – Search by client ID#.
 - c. Review the list of possible matches ServicePoint displays.
 - d. If you see your client, select him/her by clicking on the *client name* (or the pencil)
 - i. – OR – Click the 'Add New Client With This Information' button to add a new client that never existed in ServicePoint.
 - e. Now you are on the Client Profile page
- 3) To create new household
 - a. Click the *Households* tab
 - b. Note: If the client is already in a household, you will see the current household. If you need to update, check the update tutorial below.
 - c. Click *Start New Household* button

Client - (434) Ranger, Lone

(434) Ranger, Lone Date: 08/14/2013 12:00:00 AM
Release of Information: None

Client Information Service Transactions

Summary Client Profile **Households** ROI Entry / Exit

This Client is not currently a member of any Household

Previous Households

Search Existing Households Start New Household

- d. Select *Household Type* from the dropdown list
- e. Find or add the next household member
 - i. Enter the household member's First and Last Name and SSN to search for him/her
 - ii. Review the list of possible matches ServicePoint displays.
 - iii. If you see your household member, select him/her by clicking on the **+ sign**
 1. – OR – Click the button to add a new household member
 - iv. Continue searching and adding each household member

- v. Note the 'Selected Clients' for this household are listed at the bottom of the page. If you added a client to the household by mistake, click on the **– sign** to remove them

Add New Household

Household Type

Household Type* Single Parent

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name: First Melissa Middle Last Johnson Suffix

Alias

Social Security Number 123 - 45 - 7865

Social Security Number Data Quality Partial SSN Reported (HUD)

Exact Match ☐

Search Clear Add New Client With This Information

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
No matches.						

Selected Clients


ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
– 436	Johnson, Melissa	123-45-7865				0
435	Johnson, Russell test	786-55-6765				0

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Continue Cancel

- f. When the household is complete, click the *Continue* button at the bottom of the page
 - g. Verify the Household Type
 - h. Select the correct Head of Household
 - i. Select the Relationship to Head of Household for each member
 - j. Click *Save & Exit*
 - k. Note you are on the Households tab
- 4) To enter the entire household into a project
- a. Click the *Entry/Exit* tab.
 - b. Click *Add Entry/Exit* button
 - c. Note: the popup shows only one household member is checked by default.
 - d. If the whole family is entering the program, click *the box* next to the Household Type. (If a household member is not entering the program, uncheck the box preceding his name to not include the person)
 - e. Choose the correct entry Type
 - f. Click *Save & Continue*

Household Members

 To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

☒ (27137) Couple With No Children

☒ (192778) Johnson, Russell test1 (Joined Household: 04/16/2013)

☒ (192779) Johnson, Sandra test1 (Joined Household: 04/16/2013)

Entry Data - (192779) Johnson, Sandra test1

Provider *	00 RTFH - Demo - EE (6412)	Search	My Provider	Clear
Type *	HUD			
Entry Date *	04 / 16 / 2013	12	: 00	: 00 AM

Save & Continue Cancel

- g. Complete the Entry into the project by answering all assessment questions for all household members
 - i. Under Household Members, click on the *next household member* and complete the default assessment.
 - ii. Click **Save** and do the same for each household member.
 - iii. Look to see if there are more assessments to be completed on this page.
 - iv. Click on the *next assessment* and complete it for each household member.
 - v. Repeat for each assessment.
- h. Verify that all household members and all assessments have a green arrow next to them.
- i. After all assessments are complete for each household member, click **Save & Exit** button.

Entry Assessment

Select an Assessment

2010 HUD - UDE 2010 HUD - PSDE

Household Members

(192778) Johnson, Russell test1
Age: 27

(192779) Johnson, Sandra test1
Age: 53

2010 HUD - UDE Entry Date: 04/16/2013 12:00:00 AM

Name and SSN were entered at Client Profile

Date of Birth 04 / 16 / 1946

Date of Birth Type * Full DOB Reported (HUD)

Primary Race * White (HUD)

Secondary Race -Select-

Ethnicity * Hispanic/Latino (HUD)

Gender * Male

U.S. Military Veteran? No (HUD)

Housing Status * Imminently losing their housing (HUD)

Zip Code Last Permanent Address (90 or more days) 12345

What type of zip code is this? (Zip Data Quality) Full or Partial Zip Code Reported (HUD)

Prior Living Situation (night before entry) Rental by client, no housing subsidy (HUD)

Length of Stay at Prior Living Situation One year or longer (HUD)

Are any disabilities a 'Disabling Condition'? No (HUD)

Is client chronically homeless? No

Save Save & Exit Exit

- j. You have added a new household and entered them into your program
- k. See Entry/Exit & Interim Workflow documentation for more information

How To Add A New Household Member

This is used to add an additional household member to an existing family that is already entered into a project. This can include a baby born during a program stay.

- 1) After logging into ServicePoint, make sure you are entering data for the correct program (top left side of the screen). If needed, EDA into the correct program. Do not use the back-date mode.
- 2) First, add the new member of the family to the household
 - a. Click on *ClientPoint*
 - b. Search for the Head of Household to which the new family member will be attached.
 - i. Search by typing in the First and Last names and SSN
 - ii. – OR – search by *Client ID*
- 3) From the Head of Household's record, click on the *Households* tab
 - a. Click *Manage Household*
 - b. Click on *Add/Delete Household Members*
 - c. Search for the new family member.
 - i. **NOTE:** If the search screen does not automatically display, click on the arrow to the left of *Add Clients to the Household*
 - ii. Type in the client's first and last name and SSN. Answer the SSN data quality question.
 - iii. Click the *Search* button. Look for possible matches. If you find a match, click the *green plus sign* next to the client's name
 - iv. If no matches, click *Add New Client With This Information*.

Add/Delete Household Members - (383) Single Parent

Household Members						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(971) Mouse, Mama	29	Yes	Self	05/05/2014	0	1
(973) Mouse, Brother	4	No	Son	05/05/2014	0	1
(972) Mouse, Sister	5	No	Daughter	05/05/2014	0	1

Previous Household Members

This Household does not have any previous members.

Add Clients to the Household

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name	First	Middle	Last	Suffix
Little			Mouse	

Alias

Social Security Number

Social Security Number Data Quality: Don't Know or Don't Have SSN (HUD)

Exact Match

Search Clear Add New Client With This Information

- d. Click *Continue*

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
974	Mouse, Little						0

Showing 1-1 of 1

Continue Cancel

- e. Select the *Relationship to Head of Household* as appropriate and change the *Joined Household* date to the date the new household member joined the family.

- i. **NOTE:** For an infant born during a program stay, change the date to the baby's birthdate

Household Information - (383) Single Parent

(383) Single Parent Save Save & Exit Exit

Household Type * Single Parent

Income US\$0.00 monthly (US\$0.00 annual)

Client Count 4

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(971) Mouse, Mama	29	Yes	Self	05 / 05 / 2014	0	1
(973) Mouse, Brother	4	No	Son	05 / 05 / 2014	0	1
(974) Mouse, Little		No	Daughter	07 / 25 / 2014	0	1
(972) Mouse, Sister	5	No	Daughter	05 / 05 / 2014	0	1

Add/Delete Household Members Household History Report

Previous Household Members

Household Data Sharing

Client: (971) Mouse, Mama Add Household Data

Individual Client Assessment

Household Members

- ☒ (971) Mouse, Mama
Self, Age: 29
- ☒ (973) Mouse, Brother
Son, Age: 4
- ☒ (974) Mouse, Little
Daughter, Age: Unknown
- ☒ (972) Mouse, Sister
Daughter, Age: 5

Client Record Issue ID Card

Name	Mouse, Mama
Alias	
Social Security	555-22-2222
SSN Data Quality	Full SSN Reported (HUD)
Age	29

Household Profile Assessment

- f. Click **Save & Exit** when you are done
- 4) To add new member to existing entry/exit
- From the Head of Household's record, click on the *Entry/Exit* tab
 - Click on the pencil next to the program entry date to edit
 - Leave the *Entry Date* as the original program entry date.
 - Click **Save & Continue**

Edit Entry Data - (971) Mouse, Mama

Household Members

To update Household members for this Entry Data, click the box beside each name.

☐ (383) Single Parent

- ☒ (971) Mouse, Mama (Entry Date: 05/05/2014 4:28 PM)
- ☒ (973) Mouse, Brother (Entry Date: 05/05/2014 4:28 PM)
- ☒ (972) Mouse, Sister (Entry Date: 05/05/2014 4:28 PM)

Include Additional Household Members

Edit Entry Data - (971) Mouse, Mama

Provider	00 RTFH Demo - EE + Interim + Services (6427)
Type	HUD
Entry Date *	05 / 05 / 2014 4 : 28 : 39 PM

Save & Continue Cancel

e. Click *Include Additional Household Members*

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* 00 RTFH Demo - EE + Interim + Services (6427) Search My Provider Clear

Type* HUD Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
<input checked="" type="checkbox"/>	(971) Mouse, Mama	Yes	05/05/2014						
<input checked="" type="checkbox"/>	(973) Mouse, Brother	No	05/05/2014						
<input checked="" type="checkbox"/>	(972) Mouse, Sister	No	05/05/2014						

Include Additional Household Members Showing 1-3 of 3

Entry Assessment

Select an Assessment

☒ 2010 HUD - UDE - Demographics plus ☒ 2010 HUD - PSDE - Income/Disability

Household Members

☒ (971) Mouse, Mama Age: 28
☒ (973) Mouse, Brother Age: 4
☒ (972) Mouse, Sister

Household Data Sharing

Client: (971) Mouse, Mama Add Household Data

2010 HUD - UDE - Demographics plus Entry Date: 05/05/2014 04:28:39 PM

f. Check the box next to the new family member's name

g. Change the program entry date to the date the new family member joined the family in the program (for an infant born during program stay, the entry date will be the DOB)

Edit Entry Data - (971) Mouse, Mama

Household Members

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

☐ (383) Single Parent

☒ (971) Mouse, Mama (Entry Date: 05/05/2014 4:28 PM)

☒ (973) Mouse, Brother (Entry Date: 05/05/2014 4:28 PM)

☒ (974) Mouse, Little

☒ (972) Mouse, Sister (Entry Date: 05/05/2014 4:28 PM)

Edit Entry Data - (971) Mouse, Mama

Provider 00 RTFH Demo - EE + Interim + Services (6427)

Type HUD

Entry Date* 07 / 25 / 2014 4 : 28 : 39 PM

Save & Continue Cancel

h. Click the new family member's name under Household Members to edit the assessment information

2010 HUD - UDE - Demographics plus ☒ 2010 HUD - PSDE - Income/Disability ☒

Household Members

- ☒ (971) Mouse, Mama Age: 28
- ☒ (973) Mouse, Brother Age: 4
- ☒ (974) Mouse, Little Age: 14 (selected)
- ☒ (972) Mouse, Sister Age: 4

2010 HUD - UDE - Demographics plus Entry Date: 05/05/2014 04:28:39 PM

Name and SSN were entered on the Client Profile

Date of Birth * / /

Date of Birth Type *

Primary Race *

Secondary Race

Ethnicity *

Gender *

Housing Status *

Zip Code Last Permanent Address (90 or more days)

What type of Zip code is this? (Zip Data Quality)

Prior Living Situation (night before entry)

Length of Stay at Prior Living Situation

U.S. Military Veteran?

Are any disabilities a "Disabling Condition"?

- Complete all necessary assessments for the new household member
- When all assessments are completed for the new family member, click *Save & Exit*
- See [Entry/Exit & Interim Workflow](#) documentation for more information

How To Exit A Household Member Before Others Leave

This is used when a family has entered a project together, but one person leaves the project separately from the rest of the family.

- 1) To find the client
 - a. Click on *ClientPoint*
 - b. Enter the client's First and Last Name and SSN to search for him/her.
 - i. – OR – Search by client ID#.
- 2) Close out any Services and Case Management Notes for this client only
- 3) To update the Entry/Exit
 - a. Click on *Entry/Exit* tab
 - b. Identify the correct *Entry/Exit*
 - c. Click on the edit *pencil for Exit Date*
 - d. Make sure only the checkbox for the son is checked
 - e. Complete the form and click *Save & Continue*
 - f. Complete/update any information upon Exit
 - g. Click *Save & Exit*

How to add a Household Member who returns to the project as part of a different household

This is for when a client who is/was part of one family that previously entered a project together, then left project and then returned with his/her own family.

- 1) To find the client
 - a. Click on *ClientPoint*
 - b. Enter the client's First and Last Name and SSN to search for him/her.
 - i. – OR – Search by client ID#.
- 2) To create new household
 - a. Click the *Households* tab
 - b. Click *Start New Household* button
 - c. As detailed above, create the new household with the appropriate type. You don't need to remove the son from the prior household.
- 3) Add the Entry/Exit for the new family.