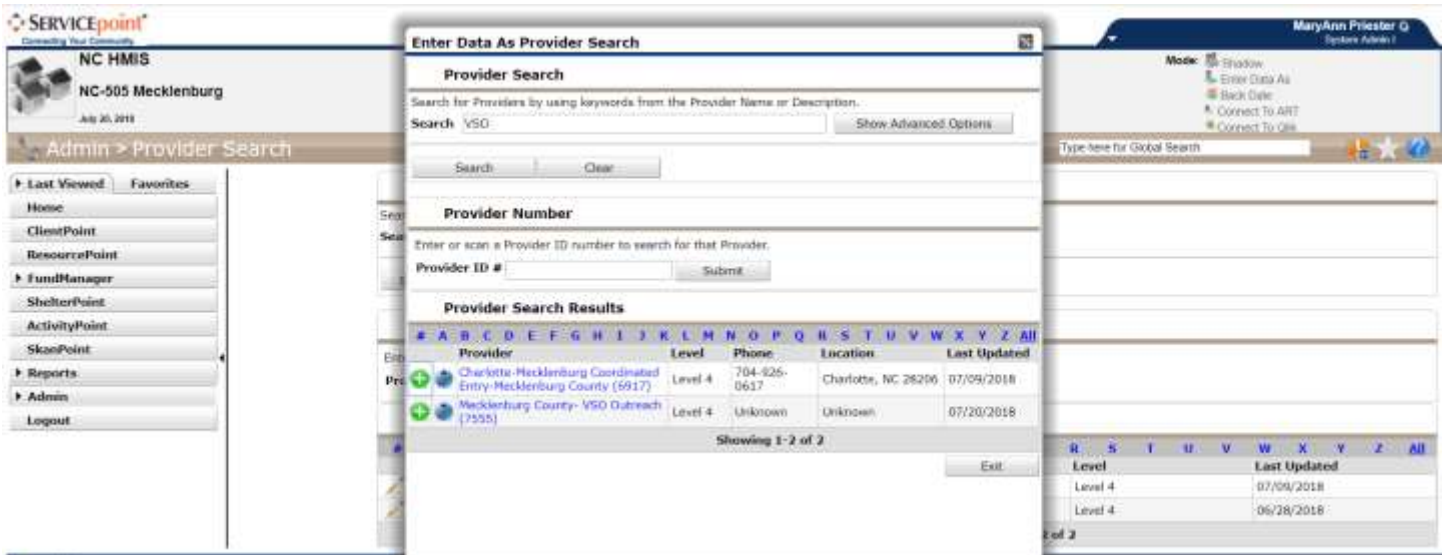# VSO Outreach Workflow

Note: Click the **"Enter Data As"** function (upper right-hand corner) to switch between programs.

Select: Mecklenburg County- VSO- Outreach (7555)

1. Click on **ClientPoint** (left hand side)

2. To locate client record:

   - Enter the client's First and/or Last Name and/or partial SS#
   - Existing Client: Click the **Edit Pencil** (or Client's name) from the results list
   - Existing Client: Enter the Client's ID# if it has been established and is known
   - If client cannot be located, they will need to be added to the system. See **Adding New Client Addendum** on page 4 of this document.

Release of Information (ROI)

1. Click the **ROI** tab.
   1. If client has had a CE and and ROI has been entered for CE, then it is not necessary to have the client sign another ROI.
   2. If the client does not have an unexpired CE ROI in the system, you will need to have them sign one and add an electronic Release of Information.

2. Adding a ROI

   a. Click **Add Release**.
   b. Check the **box** next to **Household Type** to include them in the ROI (if applicable).
   c. *Granted* = **Yes.** *Start date* = ROI collection date (if not already in backdate). *End date* = Client determined. *Documentation* = XXX (most common: Signed Statement from Client).

Secure Client Profiles (if necessary) see "Securing Client Records Addendum" for more information (attached)
   d. Click **Save Release.**

Case Manager

1. Click the Case Manager tab to add a Case Manager Information.
2. Click **Add Case Manager**
3. Click **Type:** Me and then click **Add Case Manager.**

Client Profile and Demographics

1. Click the **Client Profile** tab and enter data for all HH members for all fields.
    a. If working with a HH, click the **HH tab**. Click a HH member's name to switch.
    b. Click the **Client Profile** tab and enter data. Continue to switch between HH members.
    c. Click the edit pencil next to **Client Record** and complete information
        ▪ Be sure to complete the **Name Data Quality** and the **SSN Data Quality**
2. Click the edit pencil next to **Client Demographics** and complete information
    a. Be sure to complete the **DOB Type.**

Client Notes

1. Click **Add Client Note**
    a. Enter a client note providing pertinent information (See example below for guidance).

CE Client Note Example:

Date: Name (Age), Marital Status. Contact Information: 704.555.5555. Email: test@yahoo.com.

Date: Living Situation: Relocated back to Charlotte last week, staying at shelter until she can get a job and find housing.

General Info:

Ms. Test said she left Charlotte in July 2015 and moved to a small town in Tennessee. Ms. Test states that she gave up her housing when she moved. Ms. Test says she has an Honorable Discharge but does not have a DD-214.

Income/Employment: 736 SSDI. SNAP: None.

Medical: Ms. Test has COPD and has been unable to purchase her medicine. Ms. Test does not have health benefits and would like to apply for them.

Interventions/Resources and Next Steps: VSO has requested client's DD-214 and completed an application for health benefits.

Service Transactions

Click the **Service Transactions** tab.

1. Click the **Add Services** icon
2. Check the **box** next to **Household Type**, if HH members are present.
3. **Provider:** If you are EDA as VSO, this should say VSO
4. **Start Date** = Date the service is provided
5. **End Date** = Same as start date.
6. Service Type:
   - Select the appropriate service from the drop-down menu.

7. For **Need Status**, select **Closed.**
8. For **Outcome of Need,** select **Fully Met.**
9. Select **Save and Exit.**

Adding a New Client Addendum

3. Click on **ClientPoint** (left hand side)

4. If Client cannot be located in HMIS:

   - Click **Add New Client With This Information** if not located while searching.
   - Confirm the date/time from the pop-up window. Keep as is, or change if needed.
   - A box will pop up with 3 choices: **Add Client ONLY, Add Client and Add New Household, or Add Client and Search Households**
   - If the client is Single, choose **Add Client Only**

If you, **Add Client and Add New Household,** complete the following steps:

1. Click **Start New Household**
2. Select the **Household Type**
3. Locate existing or Add new HH member
   a. Enter the client's First and/or Last Name and/or partial SS#
      - Existing Client: Click the **Green Plus** sign from the results list.
      - Existing Client: Enter the **Client's ID#** if it has been established and is known
   b. Add a new client if not located through search. Warning message will appear
      - Clients selected (or added) will appear at bottom of screen
   c. Continue until all HH members have been added (or selected).
      - Click **Continue**

- Answer: **Head of HH** (Yes or No), **Relationship to HoH** (if HoH, Self will auto-fill), **Joined HH** (if different than data entry date) Forget to add information regarding the SS? (This information can be entered in real time or backdate mode.)
- **There should only be 1 Head of Household!**

4. Forget to add information regarding the SS#? (This information can be entered in real time or backdate mode.)
   a. Click on the **Edit** pencil next to the **Client Record** section and enter data. Click **Save**.
      - On the left-hand side, select another HH members name to switch. The active client is highlighted in blue. See step 6a.
      - When finished, click on the HoH record, as a regrouping aspect. Click **Save & Exit** (this will close the HH window). Warning message will appear
5. Forgot something? Made a mistake? Click **Manage Household** button to edit/revise.

Adding new Clients to an existing HH

1. Click **Manage Household**
2. Click **Add/Delete Household Members**
3. Click arrow u **Add Clients to the Household** section**.** Screen expands.
   a. See Step 3 - 5 above for instructions.
      - If **Joined HH** is different than original HH members, update these fields.

If a Client Leaves the Household

1. Click **Manage Household**
2. Click the **Red Minus** sign next to the client who is leaving.
3. Enter the **Date Client Left Household.** Click **Save.**
   a. This client will now be located under the u **Previous Household Members** section, and can return (or be reactivated) to the HH if need be.
      - If reactivated, complete questions from the pop-up window. Click **Save.**
4. Click **Save & Exit** to close HH window. Warning message will appear

Deleting a Household Relationship

1. Click **Manage Household**
2. Click **Add/Delete Household Members**
3. Click the **Delete** icon next to the HH member who is to be deleted.

5

      a. This will delete this Client's association with the Household Completely.

      b. This client will now be located under the **Previous Household Members** section.

4. Click **Continue**
5. This client can be reactivated, if need be.
6. Click **Save & Exit** to close the HH window.

Securing Client Records Addendum

1. Sharing is enabled with an ROI (electronic Release of Information) entered into the System whether you are sharing internally or with outside agencies. Every client must have an electronic ROI. Internal sharing does not require a signed paper release from the client because there is "implied consent" for record keeping (including the HMIS) that operates when a client asks for services. However, a signed client release is only and always required for external sharing outside the agency. This is includes sharing information on the Client Profile (Search Screen).

2. If you have an internal and external sharing plan, you will need to manage to the electronic ROI.
   - **Entering a New Client When There is an Existing External Sharing QSOBAA In Place:** Enter an ROI reflecting the paper release with negotiated start and end dates. The first time you open a client after the initial Release expires, you will add a new Release and restrict the client's record to sharing within your agency by removing external partners from the individual parts of the client record. You can make the dates very long, as under HIPAA, internal sharing does not require an executed client release (paper).
   - **Entering an Existing Client After a New External Sharing QSOBAA is Enacted:** Your agency has negotiated a new Interagency Sharing QSOBAA. The first time you see the client after the new agreement is negotiated, you obtain informed consent to share data going forward. Edit the end date on the old internal sharing ROI and add a new electronic release reflecting the paper start and end date. When the release expires, you will add a new Release and restrict the client's record to sharing within your agency by removing external partners from the individual parts of the client record.

Securing Client Records/Client Data in HMIS

3. If a client does not want any of his/her information shared outside your agency (including the basic information on the client search screen), the entire client record can be locked down using **Methods #1 or #2 below**. **This prevents other providers from being able to search for or view the client record.**

> **Note:** **Methods #1 and #2 WILL result in DUPLICATE HMIS RECORDS** if the client seeks services from another HMIS participating agency due to the fact that the other agency will not be able to locate the record on the client search screen. To minimize duplicate record and ensure that clients are adequately informed of their rights, all users should read from an agency standardized privacy script when explaining the use of HMIS to clients. The necessity to reduce duplication when and where possible should be something that is included in the privacy script used. **Methods #3 and #4 below provide detailed instruction for locking down the client record without closing the Search Screen**.

4. If a client agrees to have his/her information share on the client search screen but does not want other pieces of information shared with external partners, remove the external sharing by using **Methods #3 or #4 below.**

> *Note: In order for users to edit client level security, 'Allow User to Change the Security of their Clients' Assessments' must be enabled on the user's license.*

<center>*Method #1: Locking Down a Client Record to ALL External Providers*</center>

1. Use the *Client Point* search screen to locate the client for whom visibility will be altered.

2. Click the client's name. The screen will refresh and display the **Client Profile**

3. Click the **Lock** icon to display the **Client Visibility** screen **(Figure #1)**
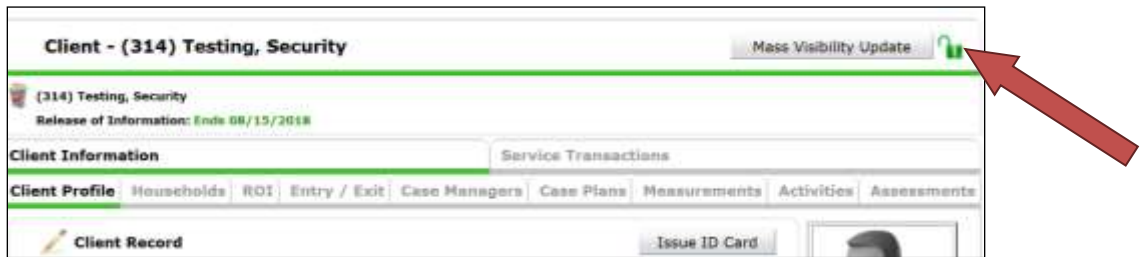
Figure 1

> *Note: Youth, HOPWA, Substance Abuse, and Mental Health providers, may see a 🔒 lock indicating that the record does not contain the "Global" Visibility Group and is therefore only available to internal and/or external partners included in the agency's established sharing plan.*

5. Click the **Red Minus** icon next to **'Global'** *(if applicable)* so that providers outside the visibility (a.k.a. sharing) plan will no longer be able to locate or view the client's information in ServicePoint. **(Figure #2)**

6. If applicable, click the **Red Minus** icon next to each **EXTERNAL** *provider* **and/or** *External Provider Group* included in the visibility (a.k.a. sharing) plan so those providers will no longer be able to locate or view the client's information in ServicePoint. **(Figure #2)**
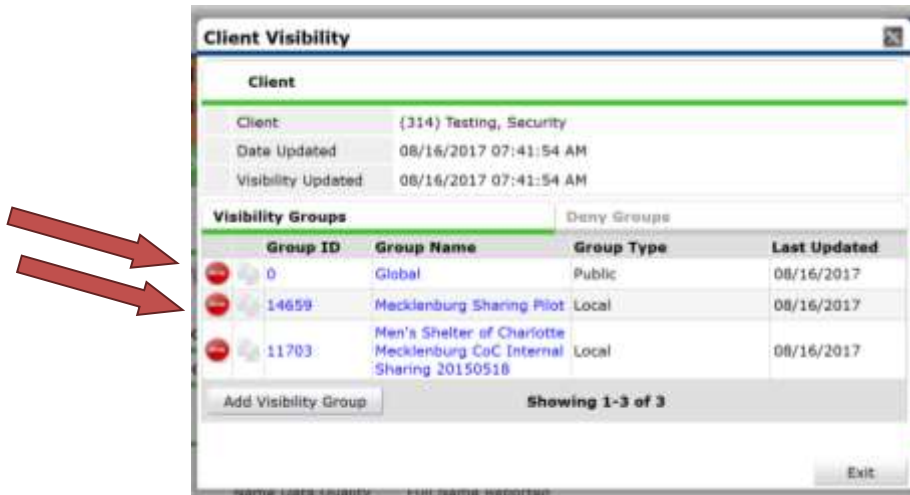
7. Figure 2 Click the **Exit** icon to return to the **Client Profile**.

!!! CAUTION !!!

It is **VERY IMPORTANT** that your internal visibility remains intact; removing your internal visibility group will result in you locking yourself out of the client's record. If you do not see any internal sharing set up, contact your Agency and/or local System Administrator for assistance.

Method #2: Locking Down a Client Record to Select External Providers

1. Use the *Client Point* search screen to locate the client for whom visibility will be altered.

2. Click the client's name. The screen will refresh and display the **Client Profile**

3. Click the **Lock** icon to display the **Client Visibility** screen **(Figure #3)**

Figure 3

> **Note**: Youth, HOPWA, Substance Abuse, and Mental Health providers, may see a 🔒 lock indicating that the record does not contain the "Global" Visibility Group and is therefore only available to internal and/or external partners included in the agency's established sharing plan.

4. Click the **Red Minus** icon next to **'Global'** *(if applicable)* so that providers outside the visibility (a.k.a. sharing) plan are no longer be able to locate or view the client's information in ServicePoint. **(Figure #4)**

5. Click the blue **Group ID** *(ex. 18421)* **or Group Name** *(ex. Mecklenburg Sharing Pilot)* to display the **Visibility Group Profile**. Note which of the external providers needs to be removed from the group. Click **Exit** when finished. **(Figure # 4 & 5)**
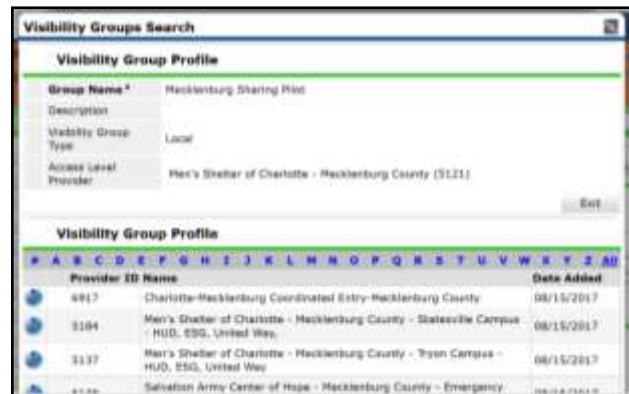

| Figure 4 | Figure 5 |

!!! CAUTION !!!

It is **VERY IMPORTANT** that your internal visibility remains intact; removing your internal visibility group will result in you locking yourself out of the client's record. If you do not see any internal sharing set up, contact your Agency and/or local System Administrator for assistance.

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6. Click the **Deny Groups** tab. Then click **Add Deny Group**. This will display the **Visibility Groups Search** screen. **(Figure #6)**

7. Use the Search field to locate desired providers to add to **Deny Groups**. Click the **Green Plus** icon next to a provider to include it in the **Deny Groups**. **(Figure #7)**
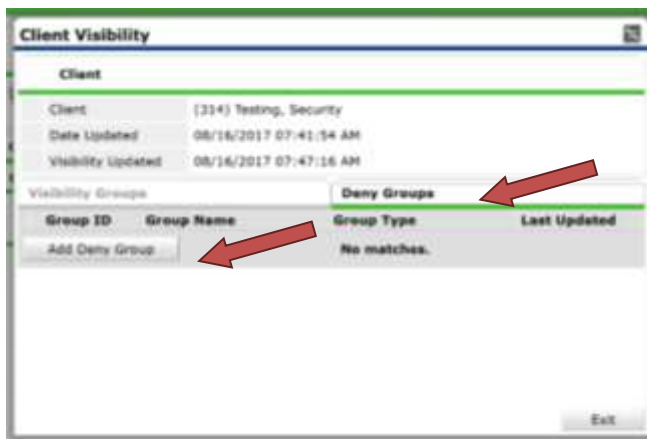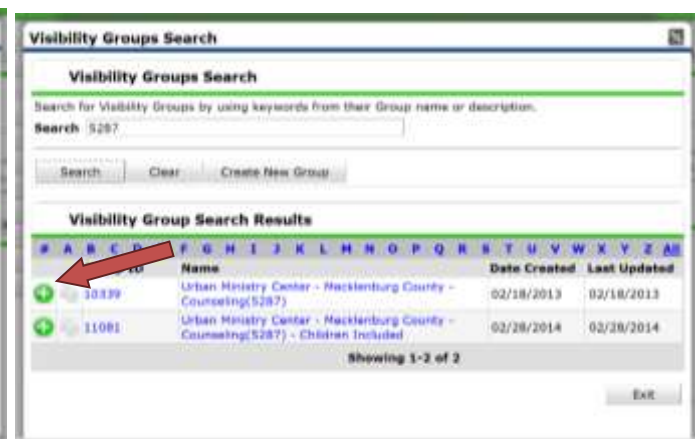

| Figure 6 | Figure 7 |

7. **Repeat** steps above until all the providers have been added then click **Exit**.

Note: The client will not be visible to the providers represented in the **Deny Groups** area.

1. Click the **Lock** icon 🔒 next to the appropriate parts of the client's record as seen in the examples below **(Figure #8)**

Figure 8

2. This will display the **Client Visibility** screen. Click the **Red Minus** icon next to **each External provider and/or External Visibility Group** included in the visibility (a.k.a. sharing) plan so those providers will no longer be able to view the client's information in ServicePoint. **(Figure #9)**
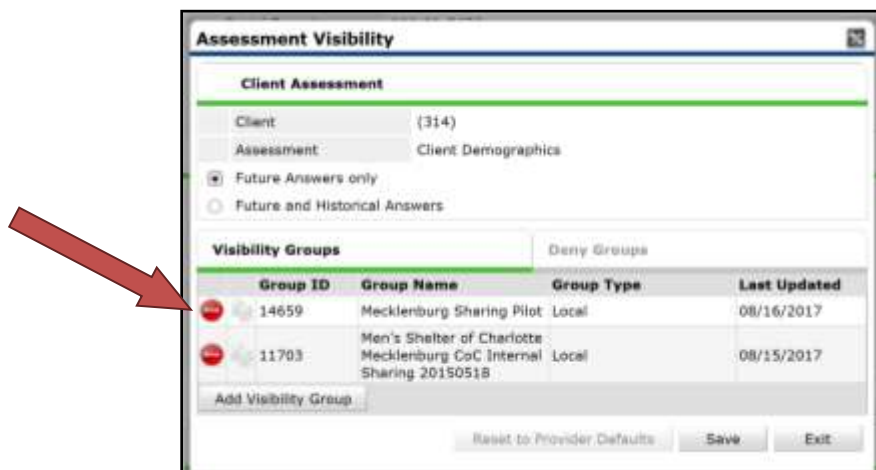

Figure 9

3. Click the **Save** to return to the previous screen.

Note: *This method works best if clients only want to restrict certain sharing partners from seeing parts of their data.*

1. Click the **Lock** icon 🔒 next to the appropriate parts of the client's record (as seen in **Method #3**).

2. Click the **Deny Groups** tab. Then click **Add Deny Group**. This will display the **Visibility Groups Search** screen. **(Figure #9)**

3. Use the Search field to locate desired providers to add to **Deny Groups**. Click the **Green Plus** icon next to a provider to include it in the **Deny Groups**. **(Figure #10)**
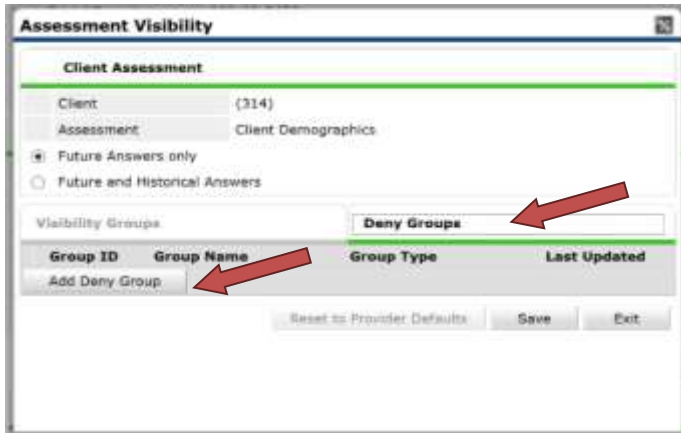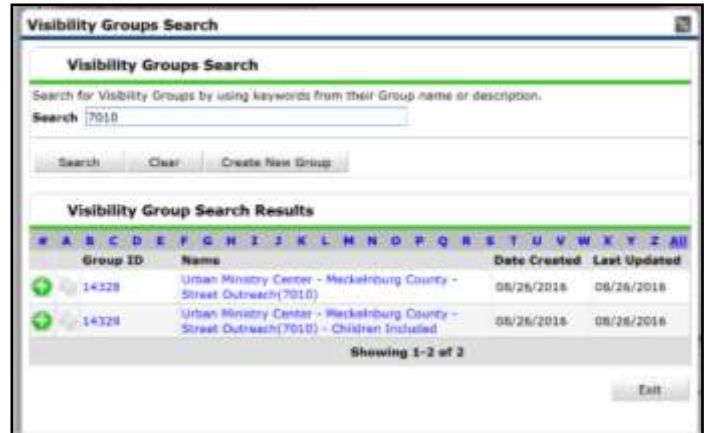

| Figure 9 | Figure 10 |

4. **Repeat** steps above until all the providers have been added then click **Exit**.

> **Note**:   The client will not be visible to the providers represented in the
> **Deny Groups** area.

Managing Existing Clients who wish to have Future Information Locked Down

In addition to the above steps, you will find it necessary to take additional steps for existing clients who wish to have their information locked down going forward.

1. First review the top Green Lock next to the "Mass Visibility" box. If this includes and external groups you will want to remove them, and also remove the "Global" visibility group. It is important that the internal visibility group remains present so that you can locate this client again.

2. Additionall you will need to secure two other locks in the system both initially and EACH TIME you add something to this client record in either Case Notes, or File Attachments. The lock for Client Notes can be foundin the upper right corner of the Case Noties field.
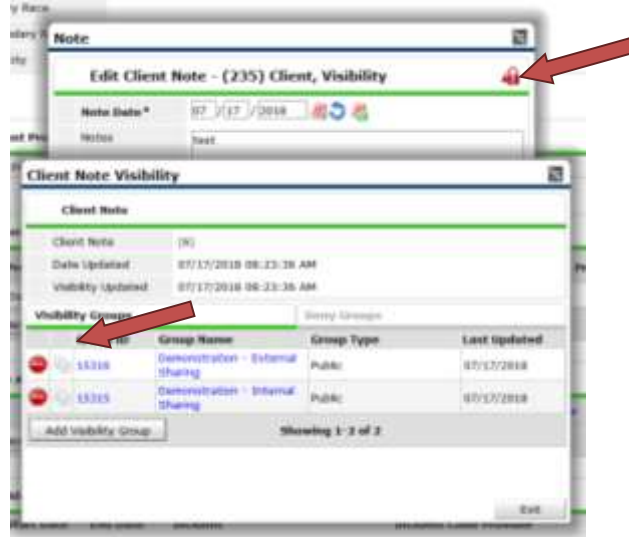
3. File Attachments must also be locked down when the client declines the ROI, and each time you add a file attachment in the future, This lock is located to the right of the File Attachment.