Diversion 2.0 HMIS Workflow (using Service Transactions)

for Ohio Balance of State Providers

1. Login

a. In your web browser go to **https://sp5.servicept.com/odod**
b. Enter username and password.
c. **This workflow is ONLY for clients who have been DIVERTED and did not enter the homeless system.**
d. Click **Enter Data As** and pick the Access Point (**AP**) provider for your agency.
e. Check **System & Agency News** (Home Page Dashboard) for important updates.

2. Create Client Profile

a. Click **ClientPoint** in the left sidebar.
b. **Search** for the head of household in the database. If no one matches, add in the Name Data Quality, SSN, SSN Data Quality, and Veteran Status, and click **Add Client With This Information**. If there is a match, select (✐) the client. Do not create a household or add household members.
c. Write **Client ID** on form.

3. ROI

a. Click **Add ROI** in the ROI dashlet.
b. **Release Granted** = "Yes"
c. **Start Date** should be the same as the date of Diversion. **End Date** should be set to a year out from the Start Date.
d. Set the **Documentation** to "Signed Statement from Client" or "Verbal Consent." Click **Save Release of Information**.

4. Record the Diversion Service Transaction

a. Click **Add Service** from the Services dashlet. (You **must** use Add Service, not Add Multiple Services)
b. Select "Homeless Diversion Programs" for **Service Type**.
c. In the **Provider Specific Service**, select the service that was provided to assist the client in being diverted.
d. Click **Save & Continue** to open the rest of the Service Transaction worksheet.
e. Fill in the **Date of Birth** and **Type**, **Number in Household** (total persons), **Race**, **Ethnicity**, **Gender**, **Residence Prior**, and **Destination** fields.
f. Skip down to **Need Information** and select **Need Status = "**Closed**"** and **Outcome of Need = "**Fully Met**"**
g. Click **Save & Exit** to save the Diversion.