HMIS Workflow for Coronavirus (COVID-19) Screening Tool

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. Click **Enter Data As** and pick the Access Point (**AP**) provider for your agency.
d. Check **System & Agency News** (Home Page Dashboard) for important updates.

2. Create Client Profile / Household

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. if this is a household create a household and add all household members.
c. Write **Client ID(s)** 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 first official contact with client(s) where data was collected and consent was given. **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. Fill in the COVID-19 related assessment responses

a. From the Summary Tab scroll down to the COVID-19 assessment section and fill in the responses based on the answers received from the Coronavirus (COVID-19) Screening Tool.
b. Click **Save** at the bottom.
c. If there are multiple people in the household click the next name in the Household box at the top of the Summary.
d. Repeat steps **4a** through **4c** for all persons in the household.
e. Click **Save & Exit** to save the Assessment or continue the Coordinated Entry process by entering a VI-SPDAT and/or creating referrals if needed.

5. Updating the COVID-19 assessment responses after follow-up screenings (via AP)

a. Click **Enter Data As** and pick the Access Point (**AP**) provider for your agency.
b. Click **ClientPoint** in the left sidebar.
c. Enter the **Client ID** if single client, or the Head of Household's **Client ID** if family, and click **Submit**.
d. Repeat steps **4a** through **4d** and update any responses for each client with changes since the last screening.
e. Click **Save & Exit** when finished.

alternate method

5. Updating the COVID-19 assessment responses after follow-up screenings (via Interim Review)

a. Click **Enter Data As** and pick the ES, TH, or Outreach project where client or household has a project Entry.
b. Click **ClientPoint** in the left sidebar.
c. Enter the **Client ID** if single client, or the Head of Household's **Client ID** if family, and click **Submit**.
d. Click the **Entry/Exit Tab** along the top.
e. Click the **Interims** (🗎) icon.
f. Click **Add Interim Review**.
g. Set the **Interim Review Type** as '**Update**' and the **Review Date** to the date the new assessment. Click **Save & Continue**.
h. Starting with the first name in the **Household Members** list, update the '**COVID-19 Assessment Date**' and any other COVID-19 related questions that have changed since the last assessment.
i. Click **Save** at the bottom and switch to the next household member and update their record accordingly. Repeat for each household member with changes.
j. Click **Save & Exit** when finished.