

Documenting Case Management Time

updated: 11/13/13

All HUD CoC Program funded projects are to keep HMIS records of the time spent on case management with clients through service transactions.

If working with a household, the service transaction should include all household members.

Recording a case management service transaction

- Navigate to a client record by going to ClientPoint and entering the client ID # or searching for the client by name
- From the client profile, click on the Service Transactions tab to bring up the Service Transaction Dashboard. Click on the **'Add Multiple Services'** icon.

Client - (1494) Lannister, Cersei

(1494) Lannister, Cersei
Release of Information: Ends 11/01/2014

-Switch to Another Household Member- Submit

Client Information **Service Transactions**

Service Transaction Dashboard

Add Need Add Service **Add Multiple Services** Add Referrals View Previous Service Transactions

View Shelter Stays View Entire Service History

- **Skip if working with a single.** If working with a multi-person household, check the boxes next to the names of all of the household members who are included in the program entry.

- If a household member shows up on the list, but is not a participant of your program, exclude them from the service transaction by leaving their box unchecked.

▼ **Household Members**

To include Household members for these Services,

(412) Female Single Parent

- (1494) Lannister, Cersei
- (1496) Lannister, Mycella
- (1495) Lannister, Tommen

- Ensure that the correct program is identified in the **'Service Provider'** section. This will default to the program that you are currently entering data as.
 - If you enter data for more than one program, always make sure to change your "Enter Data As" provider to the program you are entering information for.
- Under the **'Service List'** heading, change the **Start Date** to the actual date of the case management meeting, phone call, etc. The **End Date** will automatically change to the same date as the **Start Date**.

Multiple Services

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.


Service Provider* Haven House-East Lansing-SHP (37)

Service List

Number of Services* 1

Start Date* 11 / 13 / 2013 3 : 05 : 01 PM

End Date 11 / 13 / 2013 3 : 05 : 01 PM

Service Type* 

Should be the same as your "Enter Date As" provider setting.

- Next, click on the **Edit Pencil** next to the **Service Type** field and in the 'Edit Service Type' pop-up window choose the **Case/Care Management (PH-1000)** from the drop-down list. Click the **Submit** button to proceed.

Edit Service Type

Service Type* Case/Care Management (PH-1000)

-Select-
 Case/Care Management (PH-1000)
 Case/Care Management Referrals (PH-2400.1300)
 Clothing (BM-6500.1500)
 Grants Research Collections (TJ-4500.8300-270)
 Information and Referral (TJ-3000)
 Life Skills Education (PH-6200.4600)
 Personal Goods/Services (BM-6500)
 Rent Payment Assistance (BH-3800.7000)
 Transportation Expense Assistance (BT-8300)

Submit Cancel

- Under **'Service Costs'**, the **'Number of Units'** should reflect the number of hours spent on case management with the client on that date. The number of **units should always be recorded by the quarter hour** (ex. 0.25, 0.50, 0.75, 1, 1.25, etc).
- In the **'Unit Type'** choose **Hour(s)** from the drop-down list.

Service Costs

Number of Units 0.5

Unit Type -Select-

Cost per Unit -Select-
Hour(s)

Total Cost of Units \$

- In the **'Need Information'** section answer:
 - Need Status = Closed
 - Outcome = Fully Met
- If finished, click the **'Save and Exit'** button.
- If you have additional services to add to this household's record, you can click **'Add Another'** and repeat the process for more services.

Need Information

Need Status *	<input type="text" value="Closed"/>
Outcome of Need	<input type="text" value="Fully Met"/>
If Need is Not Met, Reason	<input type="text" value="-Select-"/>

Client - (1494) Lannister, Cersei 🔒

(1494) Lannister, Cersei

Release of Information: Ends 11/01/2014 -Switch to Another Household Member-

Client Information Service Transactions

Needs Services Referrals Shelter Stays Entire Service History

Previous Services

	Select Dates	Start Date	End Date	Provider of Service	Service Type	Service Units	Service Units Type
	<input type="text" value="-Select-"/>	<input type="text" value="11/15/2013"/>	<input type="text" value="11/15/2013"/>	Haven House-East Lansing-SHP	Case/Care Management	1	Hour(s)
		<input type="text" value="11/13/2013"/>	<input type="text" value="11/13/2013"/>	Haven House-East Lansing-SHP	Case/Care Management	0.5	Hour(s)
		<input type="text" value="11/06/2013"/>	<input type="text" value="11/06/2013"/>	Haven House-East Lansing-SHP	Personal Goods/Services		
		<input type="text" value="11/06/2013"/>	<input type="text" value="11/06/2013"/>	Haven House-East Lansing-SHP	Case/Care Management	0.75	Hour(s)

Showing 1-4 of 4

- Services can be reviewed under the **'Services'** tab of the **'Service Transactions'** section of a client's record. **All 'Case/Care Management' service transactions dated 12/1/2013 or later should have both the Service Units and Service Units Type completed.**