Documenting Case Management Time

updated: 11/13/13

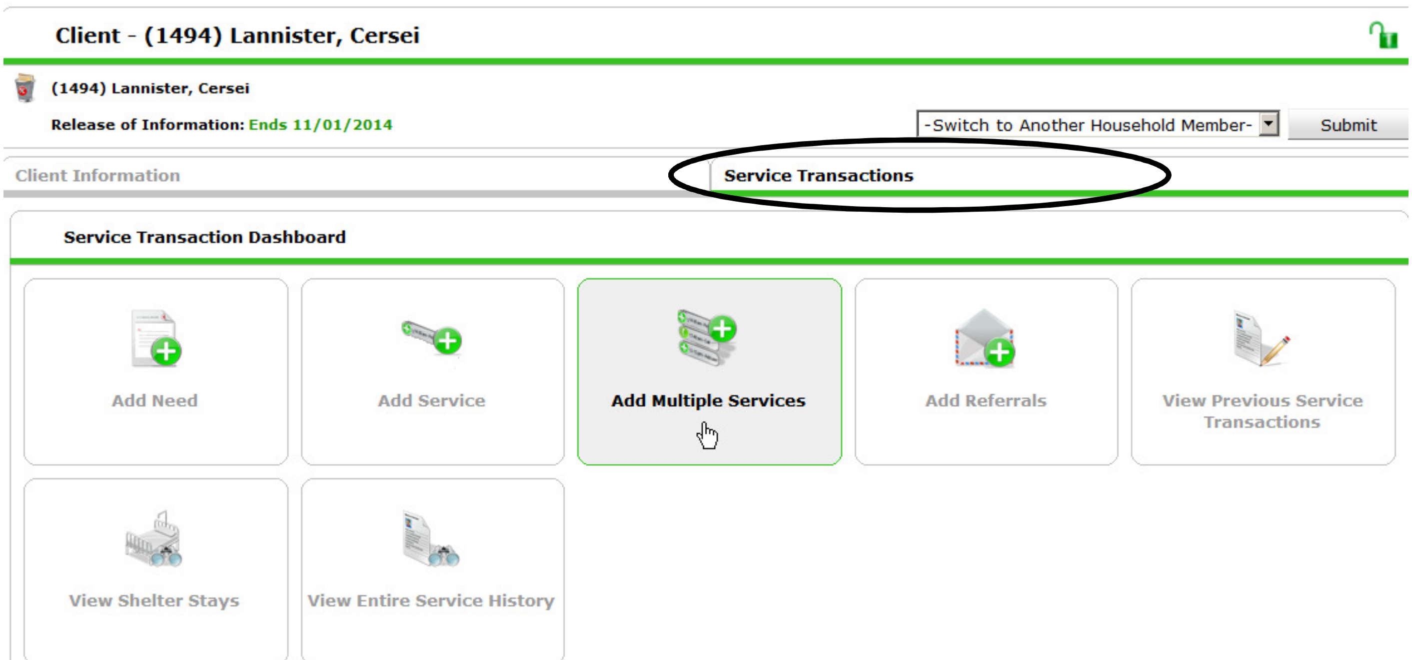
All HUD CoC Program funded projects are to keep HMIS records of the time spent on case management with clients through service transactions.

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

Recording a case management service transaction

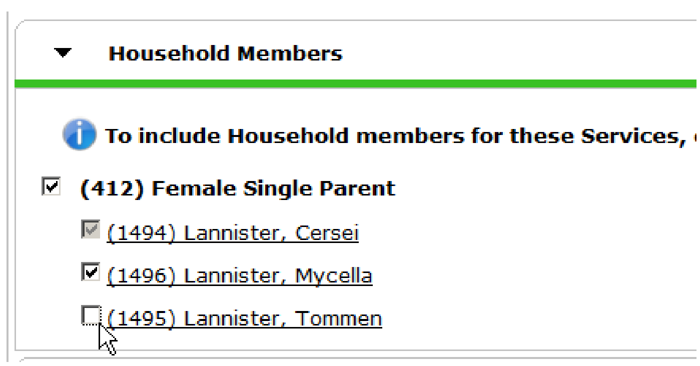
- Navigate to a client record by going to ClientPoint and entering the client ID # or searching for the client by name

- From the client profile, click on the Service Transactions tab to bring up the Service Transaction Dashboard. Click on the **'Add Multiple Services'** icon.

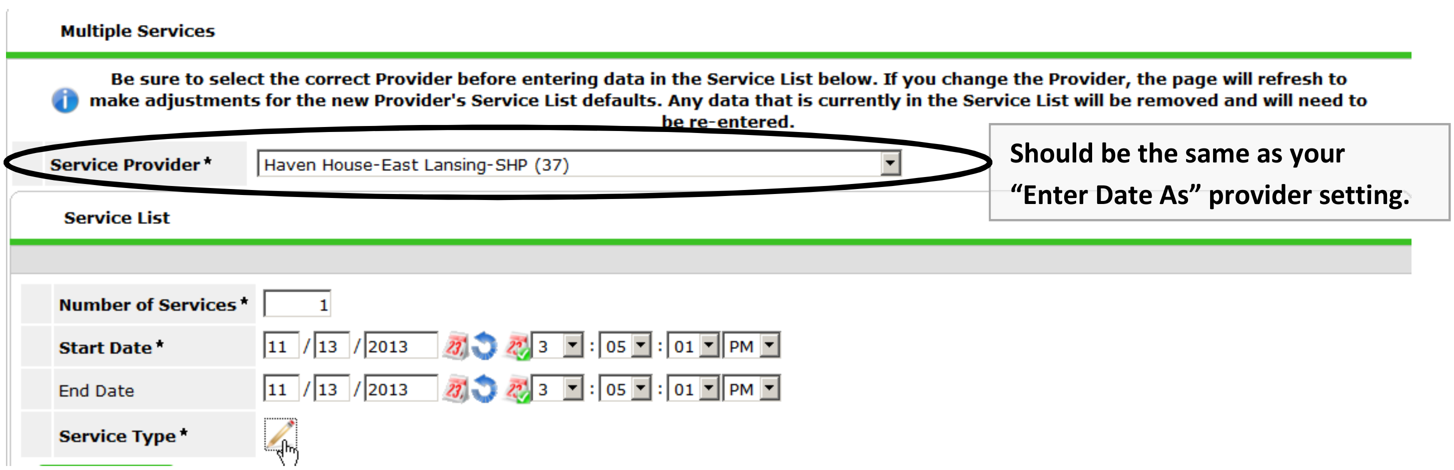


- **Skip if working with a single.** If working with a multi-person household, check the boxes next to the names of all of the household members who are included in the program entry.

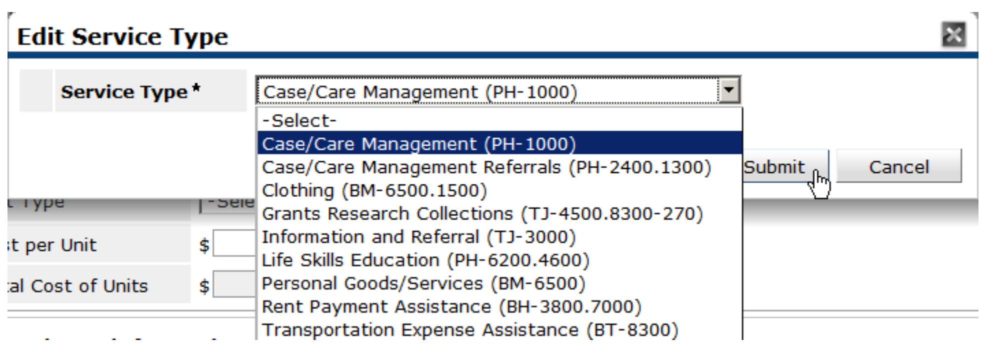
  - If a household member shows up on the list, but is not a participant of your program, exclude them from the service transaction by leaving their box unchecked.



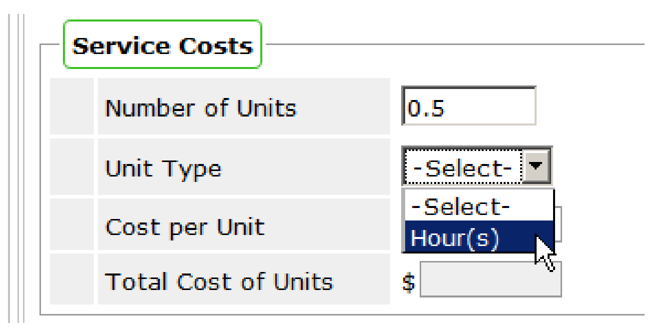
- Ensure that the correct program is identified in the ‘**Service Provider’** section. This will default to the program that you are currently entering data as.
    - If you enter data for more than one program, always make sure to change your “Enter Data As” provider to the program you are entering 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**.



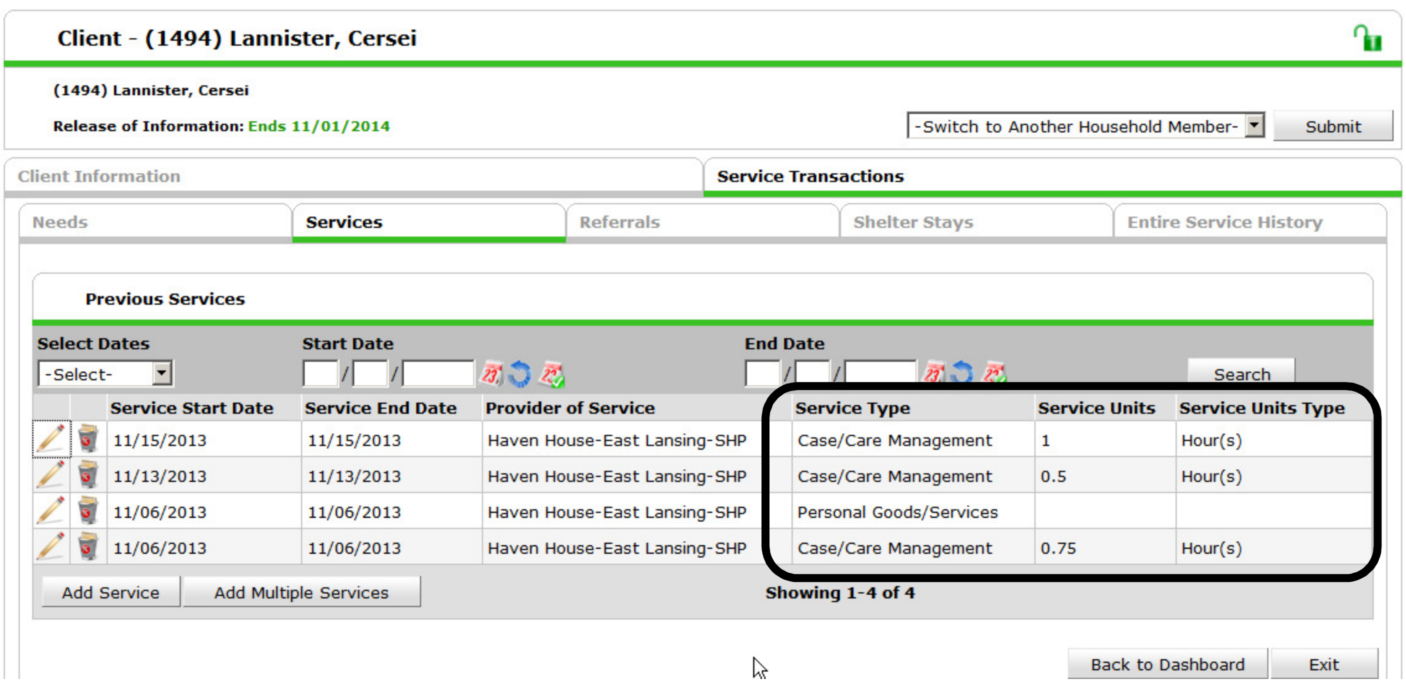
- Next, click on the **Edit Pencil** next to the **Service Type** field and in the ‘Edit Service Type’ pop-up window choose the **Case/Care Management (PH-1000)** from the drop-down list. Click the **Submit** button to proceed.



- 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 **<u>units should always be recorded by the quarter hour</u>** (ex. 0.25, 0.50, 0.75, 1, 1.25, etc).
- In the **‘Unit Type’** choose **Hour(s)** from the drop-down list.



- 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.



Service Start Date	Service End Date	Provider of Service	Service Type	Service Units	Service Units Type
11/15/2013	11/15/2013	Haven House-East Lansing-SHP	Case/Care Management	1	Hour(s)
11/13/2013	11/13/2013	Haven House-East Lansing-SHP	Case/Care Management	0.5	Hour(s)
11/06/2013	11/06/2013	Haven House-East Lansing-SHP	Personal Goods/Services		
11/06/2013	11/06/2013	Haven House-East Lansing-SHP	Case/Care Management	0.75	Hour(s)

- 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.**