West Central Data Sharing Basic Steps

Note: Security set-up was added to the system on May 21st 2014. Clients created before this date will still have a closed record. Once the record is shared, any new information added to the record after that date will be shared. Any records created on or after May 21st are shared with the West Central group.

Required Steps for HMIS

① **Log on to ServicePoint: https://minnesota.servicept.com**

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② **Search for client or create a new client record & backdate**

- *Do you have a signed consent form for each client? If client does not sign, enter as anonymous and record ID#.*
- *Enter only name, SSN, and SSN data quality on search screen. Backdate from pop-up upon opening client record.*
- *If you find multiple client records, please contact Wilder for help with combining them.*

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③ **Create a household**

- *Do not create households for single clients.*
- *Complete demographic information for all clients in the household.*

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④ **Overall Security Padlock**

- *Sets the overall security for the record allowing the name and social security number to be shared and for other data to be shared based on the ROI. No data can be shared if this padlock is closed. Located across from the client name in the right corner.*
- *A red padlock indicates closed and a red padlock with a triangle and exclamation point indicates data is shared*
- *Should be done on each client individually. Switch between all household members by using the drop down under the client name.*
- *To close the record click on the padlock and add the West Central Sharing VI-SPDAT visibliity group to the deny tab or the specific program names the client doesn't want to share with.*
- *To open a record created by your agency before May 21st, click on the padlock and add the West Central Sharing VI-SPDAT Visibility group or the specific program name your client wants to share this.*
- *If a client was created by another agency you can't modify the overall security padlock, but you can modify other security in the record for information you are adding (see steps 5, 6, 7 and 8).*
- *See full instruction document for list of agency visibility groups to select to share or close information. You will have problems if you select the wrong one.*

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⑤ **Complete ROI**

- *Complete an ROI record for each program the client enters into and also for the provider where you are entering the data--this is the provider that will display by default when you click "Add Release of Information".*
- *ROI required for all clients*
- *The ROI controls sharing of data beyond the client name and Social Security number.*
- *The ROI step must be done before any entry/exit or services are recorded.*
- *Start date= 1/1/2000*
- *ROI end date = 1 year after program entry/service start date.*

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⑥ **Entry/Exit and Assessment: Enter client/household into program and complete assessment**

- *NOTE: Any new informaiton recorded in the West Central Assessment will be shared. Data entered before May 20 will not be shared. Assessment questions answered prior to 5/21 will need to be opened manually to be shared. Open already answered questions on the West Central or Household Data Sharing assesessment first. Then answer any new assessment questions.*
- *You will see multiple assessments. Complete Household Data Sharing or West Central Assessment first, then go to any others required for your funding. Only the data entered in the West Central Assessment and Household Data Sharing Assessments are set to be shared.*
- *Continue through work-flow and follow the entry/exit rules for your funding source.*
- *If clients do not wish to share all data with all the West Central providers, following the instructions on the West Central Data Sharing Instruction Document*
- *If information has been entered in the questions in the West Central Assessment previous to this entry and it should be shared, follow the instructions on the West Central Data Sharing Instructions document*
- *If a client doesn't want to share individual questions that are being recorded after May 20, follow the instructions on the Data Sharing Instructions document*

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⑦ Services

- *New services entered in the sytem will be shared*
- *If the client does not wish to share the service, follow the instructions on the West Central Data Sharing Instruction Document.*

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⑧ Assessment for providers that record Services, but not Entry-Exits

- *Service only programs such as shelters will enter assessment data only in the Assessment tab. Data should be entered in the West Central Assessment before the funder assessment so it will be shared correctly.*
- *New data enterd in the assessment after May 21st 2014 will be automatically shared.*
- *Data entered before May 21st 2014 will be closed and must be opened in order to be shared.*
- *To modify sercutiy for the overall assessment click on the padlock in the top right corner and add the West Central VI SPDAT Data Sharing or agency group to the visiblity or deny tab. See the West Central Data Sharing Instruction Document for more details.*

Additional instructrions for genreal data entry and data sharing are available on the HMIS website. Please also contact the HMIS helpdesk any time you have questions or are unsure of the exact data entry step for a particular data sharing situation.