SERVICEPOINT 5 HOUSEHOLDS:

FREQUENTLY ASKED QUESTIONS

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INTRODUCTION

This document is intended to complement the Households In-Service that was conducted on 06/28/2013. These questions and answers are applicable for *ServicePoint* 5.6.0 and higher versions.

QUESTION 1:
How do the **Joined Household** and **Left Household** dates affect which clients can be added to **Entry/Exits, Needs, Services**, etc.?

ANSWER 1:
One of the main functions of the **Joined Household** and **Left Household** dates is to govern whether or not a household member can be added to an **Entry/Exit, Need, Service**, etc. There is a provider level setting in Admin > Provider Admin > Module Settings tab > ServicePoint Settings labeled **In Household selections, only display members that are in the Household as of the current system date** that keys off of these **Joined Household** and **Left Household** dates to determine whether or not a client can be included when creating an **Entry/Exit**, **Need**, **Service**, etc. with their household.

When this setting is turned on, only clients that are still in the household as of the **Current System Date** (or **Back Date** if you are in **Back Date Mode**) will appear in the list of possible household members when creating an **Entry/Exit, Need, Service**, etc.

For example, say a household with four clients exists, and one of the clients leaves the household on Sunday. Then, the rest of the household enters a program together on Tuesday. If this setting is turned on for a certain provider, then on Tuesday when a user sitting at that provider creates an **Entry** for the household, that user will not see the client that left on Sunday in the list of household members to associate with that **Entry**.

Now, let's say the user sitting at that provider needs to go in to **Back Date Mode** to the Friday before the client left the household in order to enter a service that all the household members (including the client that left on Sunday) received together. Once the user goes in to **Back Date Mode** to that Friday, the user will see the client that left the household on Sunday in the list of available household members because that client is still active in the household on Friday.

When this setting is turned off, all clients that have been in that household will appear in the list of possible household members when creating an **Entry/Exit, Need, Service**, etc. Clients who have already left the household as of the **Current System Date** (or **Back Date** if you are in **Back Date Mode**) can be selected, but their names will be grayed out, and their **Left Household** date will be shown next to their names.

QUESTION 2:
In terms of best practices, should the **Joined Household** date of a household member be the same date as that members first **Entry, Service**, etc. with the household?

ANSWER 2:
The biggest factor to consider here is the **In Household selections, only display members that are in the Household as of the current system date** setting described in Question 1. Setting the **Joined**

Household date to be the clients first **Entry**, **Service**, etc. with the household will certainly allow the client to be included in the list of possible household members to associate with that **Entry, Service**, etc.

QUESTION 3:
If you need to change the **Joined Household** date due to a data entry mistake, can you modify the date without going into **Back Date Mode**?

ANSWER 3:
The **Joined Household** date can be modified to a date in the past without going into **Back Date Mode**. Keep in mind that if a client has previously left the same household, you will not be able to choose a **Joined Household** date that is before that clients **Left Household** date.

For example, if a client joined a household on 01/01/2013 and then left the household on 03/01/2013, you would not be able to re-join that client back into the household on 02/28/2013 because that date is prior to the date the client left (03/01/2013).

QUESTION 4:
I accidentally removed a client from a household. How do I successfully add the member back into the household?

ANSWER 4:
There are a couple of ways that you can add a client back into a household after they were removed.

OPTION 1

1. On the client record, click the **Households** tab.
2. Under **Previous Households**, select the household that you want to add the client back into.
3. Expand the **Previous Household Members** section.
4. Click the **Re-join Household** icon for the client that you wish to add back into the household.
5. Set the **Date Client re-joined Household** equal to the **Left Household** date. If the dates from step 5) are equal, then the client will have technically been in the household for the entire period, the **Joined Household** date will equal the date you re-added the client into the household, and the client will now have 1 previous association indicating when he/she originally joined and left the household.

OPTION 2

1. On the client record for the client that was removed in error, click the **Households** tab.
2. Under **Previous Households**, select the household that you want to add the client back into.
3. Note the **Client ID**, **Household ID**, and the **Joined Household** date of the first association (when the client originally joined the household).
4. Click the **Add/Delete Household Members** button.
5. *Delete the client from the household*.

<table>
<tr><td>IMPORTANT</td></tr>
<tr><td>Deleting clients from a household should only be done when the client was added or removed due to data entry error. If a client did legitimately leave the household, the red minus icon 🚫 should be used instead of the trash can to give a historic representation of the client leaving the household. Clicking the trash can icon to delete a Household Relationship will cause the loss of the historic relationship that client had to the household. Also note that deleting the client from the household will delete that client's relationship to the household and not actually delete the client itself.</td></tr>
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6. Expand the **Add Clients to the Household** section.
7. Search for and select the client you deleted from the household. If you noted the client ID in step 3), you can use that ID in the search field to easily find the client.
8. Set the **Joined Household** date equal to the original **Joined Household** date. This workflow will not create a previous association for the client, and the **Joined Household** date will equal the original **Joined Household** date.

QUESTION 5:
On the **Household Information** screen when creating or managing a household, I see a date next to the assessment in the **Individual Client Assessment** section. Is that the system date/time, or is that tied to the household creation date?

ANSWER 5:
This date that you see on the assessment will appear when you are in **Back Date Mode** and reflects the **Date Effective** that will get stamped on the questions you answer on this window. If you are in **Back Date Mode**, the **Date Effective** for the questions that you answer will be equal to the **Back Date** that you chose. If you are not in **Back Date Mode**, the **Date Effective** for the questions that you answer will be the time today that you answer the questions.

QUESTION 6:
Can a client leave and re-join a household multiple times?

ANSWER 6:
A client can leave and re-join a household multiple times, and you will have a historic representation of that clients leaving and re-joining in the **Previous Associations** section.

For an extensive example of this, let's say a client joined a household on 01/01/2013, left the household on 02/01/2013, re-joined on 04/01/2013, left on 04/15/2013, and rejoined on 07/01/2013.

When viewing the household, you will see this client has a **Joined Household** date of 07/01/2013, and the **Previous Associations** section will indicate this client had two previous associations with this household. Clicking the magnifying glass next to the 2 will show you this clients historical **Joined**

Household and **Left Household** dates. Here, you can see that this client joined the household on 01/01/2013, left on 02/01/2013, re-joined on 04/01/2013, and then left again on 04/15/2013.

QUESTION 7:

How does visibility work with households?

ANSWER 7:

Once a household is created and clients are added to the household, other users will see the household if they have visibility to any of the clients in the household, but those users will only see the clients in the household that they have visibility to.

For example, suppose you have a household containing five clients and only two of the clients are visible to one of your users. When that user searches for one of the visible clients, they will see that client in a household containing only those two members.

QUESTION 8:

How is **Household Type** determined in canned and ART Gallery reports? Does the **Household Type** field on the **Household** record affect those reports?

ANSWER 8:

Our typical canned and ART Gallery reports will not determine the **Household Type** based on the **Household Type** field in *ServicePoint*. Instead, the **Household Type** is determined by an internal calculation that is based on the members that actually comprise the **Entry/Exit, Service, Shelter Stay**, etc. that the report is pulling data from. Changing the **Household Type** on a household will not negatively impact the way these canned and ART Gallery reports are calculating **Household Types**.

QUESTION 9:

Two clients are entered into a program. One client leaves the program and later returns. How do I add that client back to the original program such that he/she is grouped with the original client?

ANSWER 9:

Currently, there is a limitation in *ServicePoint* that does not allow a client to be entered back into an **Entry/Exit** record from which they have already exited. We will, however, be adding this feature to an upcoming version of *ServicePoint*, and we have prioritized the addition of this feature. With this in mind, there are currently a couple of workarounds, and some CoC's may prefer one or the other, depending on the circumstances.

One method, which was illustrated on the webinar, is to enter all members of a household together in the initial program entry. It is possible to **Exit** a client mid-program stay if they are leaving the program and residing elsewhere. Should the exited client return, the workaround is to **Exit** the clients that remained in the program and re-enter all of the clients together in a single **Entry/Exit** that is dated the same date as the re-entry.

For example, Jill Hill and son, Sam, enter a program together on 01/01/2012. Sam **Exits** the program on 06/01/2012. On 09/01/2012, Sam returns to the program. Since Sam already had an **Entry/Exit** with his mom and **Exited**, we cannot (at this time) add Sam back to that existing **Entry**. The workflow would then be to exit Jill on 09/01/2012 and create a new **Entry** for both Jill and Sam on 09/01/2012. This may be

the preferred workflow to report an accurate number of shelter nights if your programs are using **Entry/Exits** for shelters. Please note that in this example, if using data for the CoC APR, you would also want to keep the same assessment values for Jill that were associated with her original **Entry** since the CoC APR filters on the last **Entry/Exit** for many of its calculations.

Another possible workflow for children who may enter and exit multiple times during an operating year is to leave the child in the program without exiting the child during periods where the child is not residing in the program but plans to return. This may be the preferred workflow for long term programs that are doing CoC APR reporting in order to keep the moms **Entry** entirely intact.

QUESTION 10:
If two households contain the exact same clients, is it okay to delete one of the households?

ANSWER 10:
Households in *ServicePoint* should not be deleted without first checking to see if the household is linked to any **Entry/Exits, Needs, Services, Case Managers, Case Plans, Shelter Stays**, etc. This can be verified in *ReportWriter* using the **Household ID** of the household in question.

An important item to remember is that once the **Household ID** is written to an **Entry/Exit, Need, Shelter Stay**, etc., only clients with that same **Household ID** can be added to that **Entry/Exit, Need, Shelter Stay**, etc. in the future. If the household with that **Household ID** is deleted and there is a need to adjust that **Entry/Exit, Need, Shelter Stay,** etc. at some point (perhaps for resolving data entry errors for reporting purposes), you will be unable to add any additional members from the household because the household is no longer active.

QUESTION 11:
If I merge two clients that are each in a household, will the merged client end up being in both households?

ANSWER 11:
When merging clients, the destination client will end up having a combination of the households from the source client, as well as the households that the destination client already had, even if the households contain the same clients. It's important to remember that each distinct household has a different **Household ID**, and the two clients that are being merged may be in multiple households with different **Household IDs**, making these households separate entities. Once the merge is completed, the merged client will now be included in each household.

It's also very important to not delete any of the households without first checking to see if the household is linked to any **Entry/Exits, Needs, Services, Case Managers, Case Plans, Shelter Stays**, etc. This can be verified in *ReportWriter* using the **Household ID** of the household in question.