
CSP Training Guide

[COMMUNITY SHELTER BOARD]

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Introduction

What is CSP?

Columbus ServicePoint (CSP) is a Homeless Management Information System (HMIS) used to collect, monitor, and evaluate homeless and housing services in Columbus and Franklin County. The United States Housing and Urban Development Department (HUD) requires each local Continuum of Care (CoC) to have an HMIS that complies with the HUD standards, is used by all HUD funded entities in the continuum and is able to produce aggregate reporting at system and community level.

Currently, over 285 users in 16 agencies are using CSP to collect data for over 90 homeless and housing related programs throughout Franklin County. CSP is supported by Community Shelter Board (CSB) through a Data and Evaluation Department staffed by a full time Database Administrator, Data and Evaluation Manager, Operations Administrator and Associate Director.

Training Process

New users will be given access to the CSP training site (https://sp5.servicept.com/columbus_training) and basic training will be conducted by their Agency Administrator. Following basic training, their Agency Administrator will grant access to specialized training videos tailored to the project type(s) in which the user will be working. Once basic training is complete and all relevant training videos have been viewed, the Agency Administrator will submit a pre-certified CSP User Agreement to the CSB Database Administrator, who will then administer the certification test.

The certification test will consist of the user in training receiving three mock data intake packets – two with multiple errors and one that is completed correctly. The user will first have to determine which intake packet is correctly filled out and then, using the data in the packet, will complete an entry/exit in the CSP training site. The CSB Database Administrator will then review the completed CSP record and assess the user's proficiency level with the system. If the certification test is passed, the CSB Database Administrator will notify the Agency Administrator that full access to the live site may be granted. If it is deemed that the user is not yet proficient enough to have access to the live site, the user will need to be retrained by their Agency Administrator or attend in-person training at CSB.

The first few training videos for each project type are the same and cover the basics of CSP user. All users are required to watch these videos. The videos are:

- ServicePoint 101: Homescreen Navigation
- ClientPoint 101
- ClientPoint 102: Households

ServicePoint 101: Homescreen Navigation

In this video, the user will learn how to login to CSP, navigate between the different modules within the system using the left-hand menu, and learn about important features such as “Enter Data As” and “Back Date” modes.

ClientPoint 101

This video walks the user through the many different sections within ClientPoint, where the client’s profile lives. Here the user will learn how to search for an existing client record or add a new one, view a client’s homeless history, and see service transactions such as a Direct Client Assistance (DCA) requests or Shelter Stays.

ClientPoint 102: Households

The Households video will teach the user the importance of household composition in CSP. In this video, the user will not only learn how to create or modify households, but also when a new household is needed.

Emergency Shelters & Street Outreach

For Emergency Shelter & Street Outreach projects, the following training videos will need to be viewed after the intro videos listed:

- ShelterPoint 101: Bedlist Check-In and Entry Record Creation
- HUD Assessment A
- HIPAA
- ShelterPoint 102: Bedlist Check-Out and Exit Data
- Reservation, Interim & Exit Assessment

[ShelterPoint 101: Bedlist Check-In and Entry Record Creation](#)

This video introduces Emergency Shelter CSP users to the ShelterPoint module where they will learn to view pending shelter reservations, check a client into a shelter bed, and create a project entry record.

[HUD Assessment A](#)

HUD Assessment A is the main assessment required for Emergency Shelter and Street Outreach projects. In this video, the user will learn how to complete the HUD Assessment A as they are taken through each data element.

[HIPAA](#)

The HIPAA Assessment is required for most projects and is used to collect pregnancy, disability, and domestic violence data. The visibility of data on this assessment is closed, meaning users will only see data entered by their agency.

[ShelterPoint 101: Bedlist Check-Out and Exit Data](#)

This video teaches the user how to check someone out of their ShelterPoint bedlist and create a project exit record.

[Reservation, Interim & Exit Assessment](#)

In this video the user is walked through the process of completing the Reservation, Interim & Exit Assessment. This assessment is focuses on updates to income, non-cash benefits, and health insurance records. It is used for updates, annual reviews (if applicable), and project exit data.

Permanent Supportive Housing, Transitional Housing, Rapid Re-housing & Prevention

For Permanent Supportive Housing, Transitional Housing, Rapid Re-housing, and Prevention projects the following training videos will need to be viewed after the intro videos listed:

- ClientPoint 103: Creating an Entry Record
- HUD Assessment B
- HIPAA
- Transition Age Youth Entry Assessment
- ClientPoint 201: Interim Review
- ClientPoint 203: Creating an Exit Record
- Reservation, Interim & Exit Assessment
- Transition Age Youth Exit Assessment

[ClientPoint 103: Creating an Entry Record](#)

In this video the user will learn to create a project entry record, including attaching household members. This video does not go into detail regarding assessment data.

[HUD Assessment B](#)

HUD Assessment B is the main assessment required for Permanent Supportive Housing, Transitional Housing, Rapid Re-housing, and Prevention projects. In this video, the user will learn how to complete the HUD Assessment B as they are taken through each data element.

[HIPAA](#)

The HIPAA Assessment is required for most projects and is used to collect pregnancy, disability, and domestic violence data. The visibility of data on this assessment is closed, meaning users will only see data entered by their agency.

[Transition Age Youth Entry Assessment](#)

The Transition Age Youth Assessment collects just a few data points for Transition Age Youth households, which are households where all adults are between ages 18-24 years old. This video takes the user through each assessment question.

[ClientPoint 201: Interim Review](#)

In this video the user will learn when an Annual Review needs to be completed and how to complete it using the Reservation, Interim & Exit Assessment.

[ClientPoint 203: Creating an Exit Record](#)

In this video the user will learn to create a project exit record and receive an overview of the Exit Reason and Destination fields. This video does not go into detail regarding assessment data.

[Reservation, Interim & Exit Assessment](#)

In this video the user is walked through the process of completing the Reservation, Interim & Exit Assessment. This assessment is focused on updates to income, non-cash benefits, and health insurance records. It is used for updates, annual reviews (if applicable), and project exit data.

[Transition Age Youth Exit Assessment](#)

The Transition Age Youth Exit Assessment is very similar to the entry version of the assessment, but includes a few new data elements. This video walks the user through completing this assessment for project exit.

Supportive Services for Veteran Families (SSVF)

For SSVF projects, the following training videos will need to be viewed after the intro videos listed:

- ClientPoint 103: Creating an Entry Record
- SSVF Entry Assessment
- HIPAA
- Transition Age Youth Entry Assessment
- ClientPoint 203: Creating an Exit Record
- SSVF Exit Assessment
- Transition Age Youth Exit Assessment

[ClientPoint 103: Creating an Entry Record](#)

In this video the user will learn to create a project entry record, including attaching household members. This video does not go into detail regarding assessment data.

[SSVF Entry Assessment](#)

In this video, the user will learn how to complete the SSVF Entry Assessment for Rapid Re-housing and Homeless Prevention SSVF projects.

HIPAA

The HIPAA Assessment is required for most projects and is used to collect pregnancy, disability, and domestic violence data. The visibility of data on this assessment is closed, meaning users will only see data entered by their agency.

Transition Age Youth Entry Assessment

The Transition Age Youth Assessment collects just a few data points for Transition Age Youth households, which are households where all adults are between ages 18-24 years old. This video takes the user through each assessment question.

ClientPoint 203: Creating an Exit Record

In this video the user will learn to create a project exit record and receive an overview of the Exit Reason and Destination fields. This video does not go into detail regarding assessment data.

SSVF Exit Assessment

In this video the user is walked through the process of completing the SSVF Exit Assessment, which focuses on updates to income, non-cash benefits, and health insurance records.

Transition Age Youth Exit Assessment

The Transition Age Youth Exit Assessment is very similar to the entry version of the assessment, but includes a few new data elements. This video walks the user through completing this assessment for project exit.

Project for Assistance in Transition from Homelessness (PATH)

For PATH projects, the following training videos will need to be viewed after the intro videos listed:

- ClientPoint 103: Creating an Entry Record
- PATH Entry Assessment
- HIPAA
- ClientPoint 203: Creating an Exit Record
- PATH Exit Assessment

ClientPoint 103: Creating an Entry Record

In this video the user will learn to create a project entry record, including attaching household members. This video does not go into detail regarding assessment data.

[PATH Entry Assessment](#)

In this video, the user will learn how to complete the PATH Entry Assessment for Street Outreach and Supportive Service Only PATH projects.

[HIPAA](#)

The HIPAA Assessment is required for most projects and is used to collect pregnancy, disability, and domestic violence data. The visibility of data on this assessment is closed, meaning users will only see data entered by their agency.

[ClientPoint 203: Creating an Exit Record](#)

In this video the user will learn to create a project exit record and receive an overview of the Exit Reason and Destination fields. This video does not go into detail regarding assessment data.

[PATH Exit Assessment](#)

In this video the user is walked through the process of completing the PATH Exit Assessment, which focuses on updates to income, non-cash benefits, and health insurance records.

Homeless Hotline

For the Homeless Hotline Coordinated Point of Access project, the following training videos will need to be viewed after the intro videos listed:

- Homeless Hotline Script
- Homeless Hotline Resolution

[Homeless Hotline Script](#)

This video walks the user through understanding and completing a homeless hotline call and the required data collection. This is a very long script and is best supplemented by in-person training with the user's Agency Administrator.

[Homeless Hotline Resolution](#)

This video walks the user through understanding the Contact Resolution field and the next steps after determining the caller's homelessness status. This video discusses creating entry/exit records, creating reservations, the waitlist, and the Family Standby list.

Resources

Helpful resources are available at <https://www.csb.org/providers/columbus-servicepoint> including:

- CSP Policies and Procedures
- CSP Data Reference & Dictionary
- Project-Specific Data Collection Forms

When in doubt, your best resource is your Agency's CSP Administrator.