

ServicePoint Data Entry & Exit – CLIENTPOINT

Client Search & Creating New Record

1. Click on ClientPoint from the menu on the left.
2. Do a wide search for existing record. (i.e. search by a few letters of the first name and first few letters of the last name.)
3. If client record exists, verify that it is your client (check SSN, DOB, etc.). If client record does not exist, proceed to step 4.
4. If no match, fill in the rest of the responses:
 - Be sure to select appropriate Data Quality description (i.e. “full” versus “partial”)
 - Click “Add New Client with This Information”

The screenshot shows the 'Client Search' interface. On the left is a navigation menu with 'ClientPoint' highlighted in yellow. The main area contains a search form with the following fields: 'Name' (First: Blu, Middle: , Last: Sky, Suffix:), 'Name Data Quality' (dropdown menu), 'Alias' (text input), 'Social Security Number' (text input with dashes), 'Social Security Number Data Quality' (dropdown menu), 'U.S. Military Veteran?' (dropdown menu), and 'Exact Match' (checkbox). At the bottom of the form are three buttons: 'Search' (highlighted in yellow), 'Clear', and 'Add New Client With This Information'. A message above the form says 'Please Search the System before adding a New Client.'

Client Profile

Tabs along the top can guide you through the data entry process. All programs require the following tabs to be completed: Client Profile, Households, ROI, and Entry/Exit. Check with your program director on any additional information you should be entering into ServicePoint.

1. Start with the Client Profile tab, then work your way to the right.

The screenshot shows a row of tabs for 'Client Information'. The tabs are: Summary, Client Profile (highlighted in green), Households, ROI, Entry / Exit, Case Managers, Case Plans, Assessments, and Measurements. A large yellow arrow points from the 'Client Profile' tab towards the right.

2. Click on the pencil next to “Client Record” to add or edit any information in this section.
3. Click on the pencil next to “Client Demographics” to add or edit any information in this section.

Households

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Assessments | Measurements

This Client is not currently a member of any Households.

Previous Households

Search Existing Households | **Start New Household**

A few notes about households:

- Household “buckets” help you organize clients who commonly present together.
- Start a new household only if there is no existing household.
- Editing households should be rare. Instead, choose whom your program is serving on the Entry/Exit tab.
- Do not delete existing households. This will negatively affect existing connections, causing problems for reporting and more.

Starting a New Household:

- Start New Household
- Select Household Type
- Search and add additional household members (similar to search/create a record)
- Click Continue
- Indicate who is the Head of Household, and Relationship to Head of Household
- Joined Household Date (same as Program Start Date)
- Save & Exit

Add New Household

Household Type

Household Type *

Client Search

Name First

Name Data Quality

Alias

Social Security Number

- Select-
- Single Individual
- Female Single Parent
- Male Single Parent
- Two Parent Family
- Grandparent(s) and Child
- Foster Parent(s)
- Couple With No Children
- Non-custodial Caregiver(s)
- Family Unit (HOPWA)
- Shared Housing (HOPWA)
- Living with a live-in aide (HOPWA)
- Other

Household Information - (159) Two Parent Family

(159) Two Parent Family Save Save & Exit Exit

Household Type *

Income

Client Count

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(317) Simpson, Marge		Yes	Self	04 / 01 / 2018	0	1
(731) Simpson, Bart		No	Son	04 / 01 / 2018	0	1
(316) Simpson, Homer		No	Husband	04 / 01 / 2018	0	1
(569) Simpson, Lisa Marie	36	No	Daughter	04 / 01 / 2018	0	2
(153) Simpson, Maggie	19	No	Daughter	04 / 01 / 2018	0	1

Add/Delete Household Members Household History Report

Release of Information (ROI)

Client Information					Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Measurements
Release of Information								
Provider		Permission		Start Date		End Date		
Add Release of Information		No matches.						

A few notes about ROIs:

- Each adult must give their own consent.
- Even if no consent is given, this must be recorded.
- A parent/guardian can give consent to a minor. However, children under the age of 18 cannot give consent for themselves.

Adding a New ROI:

1. Select "Add Release of Information".
2. Select all the appropriate household members.
3. Make sure the "Provider" is your AGENCY, not your PROGRAM.
4. Release Granted = select appropriate answer.
Yes = permission has been granted to share Information. No = permission has not been granted.
5. Start Date should match the signature date on the form.
6. End Date should be one year from start date.

Release of Information

Release of Information - (317) Simpson, Marge

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

- (159) Two Parent Family
 - (317) Simpson, Marge
 - (731) Simpson, Bart
 - (316) Simpson, Homer
 - (569) Simpson, Lisa Marie
 - (153) Simpson, Maggie

Release of Information Data

Provider * Example Provider (6362) Search My Provider Clear

Release Granted * Yes ▼

Start Date * 04 / 01 / 2018 🔄 🗑️ 📅

End Date * 03 / 31 / 2019 🔄 🗑️ 📅

Documentation Signed Statement from Client ▼

Witness

Save Release of Information Cancel

Entry/Exit

The screenshot shows a software interface with a top navigation bar containing 'Client Information' and 'Service Transactions'. Below this is a sub-navigation bar with tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit' (which is active), 'Case Managers', 'Case Plans', 'Assessments', and 'Measurements'. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. The main content area is titled 'Entry / Exit' and contains a table with columns: 'Program', 'Type', 'Project Start Date', 'Exit Date', and 'Interim'. Below the table is a button labeled 'Add Entry / Exit' which is highlighted with a yellow box. The text 'No matches.' is visible below the table.

This tab is where the client (and any household members) are entered and exited into your program.

1. Click "Add Entry/Exit".
2. Select the household members that are receiving services from your program.
3. Provider = the PROGRAM the client is receiving services from
4. Type = typically relates to funding source. Check with your HMIS Lead if you are unsure what the Type for your program is.
5. Project Start Date = when client(s) are enrolled into program.
6. Click "Save and Continue".


The screenshot shows a dialog box titled 'Project Start Data - (202) hanks, tom'. It has a close button in the top right corner. The dialog is divided into two sections. The first section is titled 'Household Members' and contains an information icon and a message: 'To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.' Below this message are three checkboxes: one for '(119) Male Single Parent' (unchecked), one for '(202) hanks, tom' (checked), and one for '(204) hanks, sam' (unchecked). A yellow arrow points to the checked checkbox for '(202) hanks, tom'. The second section is titled 'Project Start Data - (202) hanks, tom' and contains a form with the following fields: 'Provider *' with the value 'COVO - CoC - Housing Stabilization Program (6133)' and buttons for 'Search', 'My Provider', and 'Clear'; 'Type *' with a dropdown menu showing 'HUD'; and 'Project Start Date *' with a date picker showing '06 / 27 / 2018' and a time picker showing '2 : 39 : 39 PM'. At the bottom right of the dialog are two buttons: 'Save & Continue' and 'Cancel'.





You will see a series of questions tied to your program. Please answer as completely as possible for each household member.

Exiting a Client

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments | Measurements

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interim
 COVO - CoC - Housing Stabilization Program (6133)	HUD	 06/27/2018		

1. Click on the pencil next to “Exit Date” to edit this data point. You will be required to report a reason for the client’s exit, as well as a destination (where did client exit to). Once entered, click “Save and Continue”.
2. Review and confirm that exit information is accurate for client. Save and Exit.