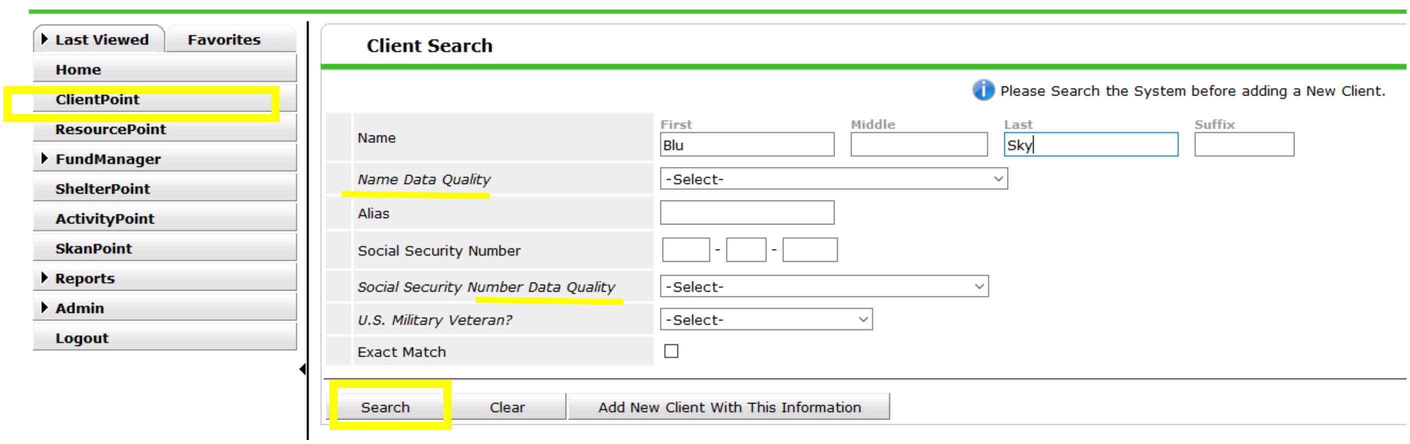
ServicePoint Data Entry & Exit – CLIENTPOINT

Client Search & Creating New Record

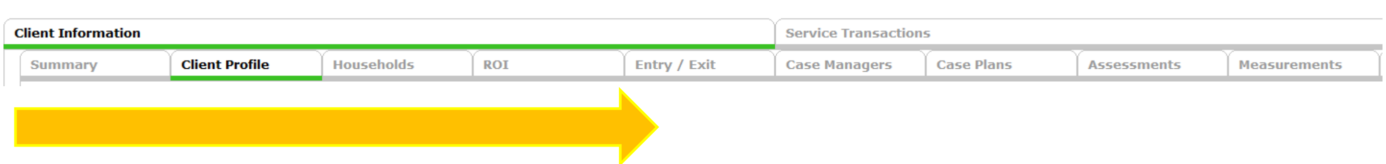
1. Click on ClientPoint from the menu on the left.
2. Do a wide search for existing record. (i.e. search by a few letters of the first name and first few letters of the last name.)
3. If client record exists, verify that it is your client (check SSN, DOB, etc.). If client record does not exist, proceed 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”



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.

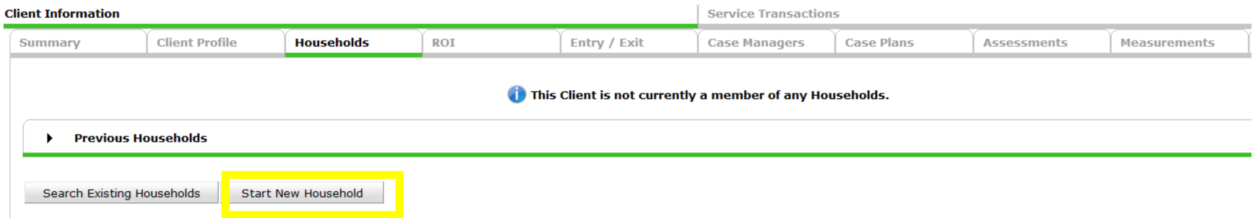
1. Start with the Client Profile tab, then work your way to the right.



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.

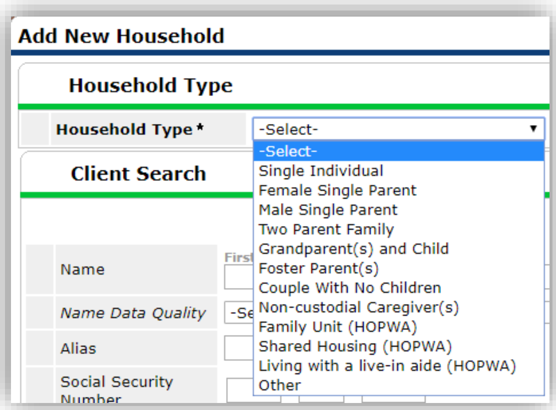
Households



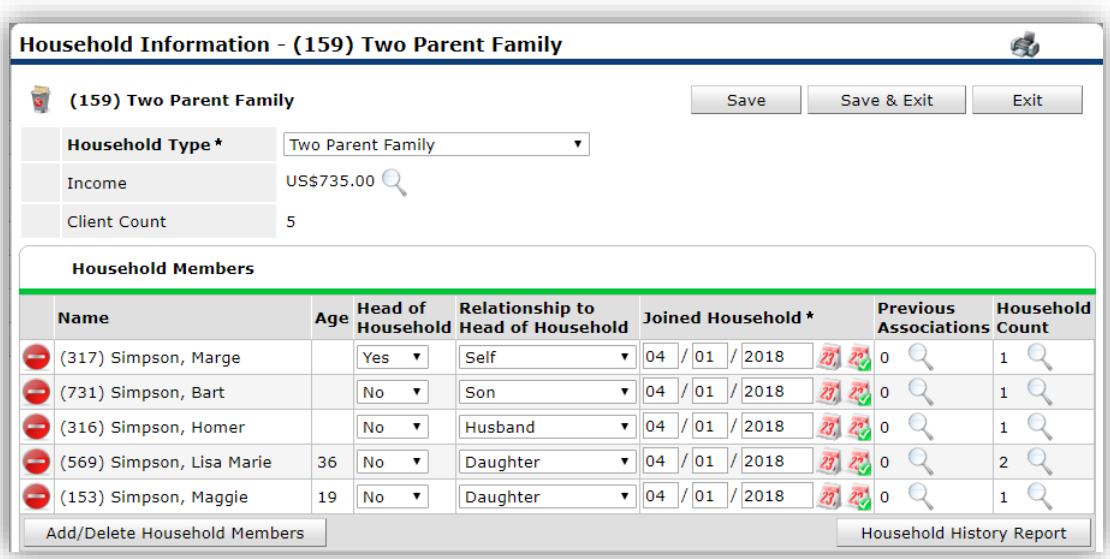
A few notes about households:

- Household "buckets" help you organize clients who commonly present together.
- Start a new household <u>only</u> if there is no existing household.
- Editing households should be <u>rare</u>. 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.

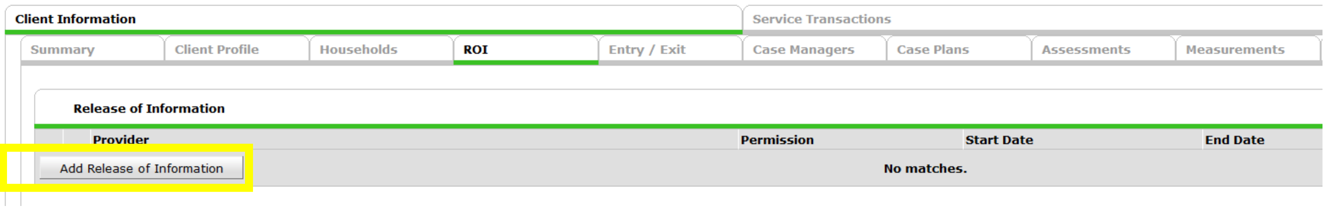
Starting a New Household:



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



Release of Information (ROI)



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.

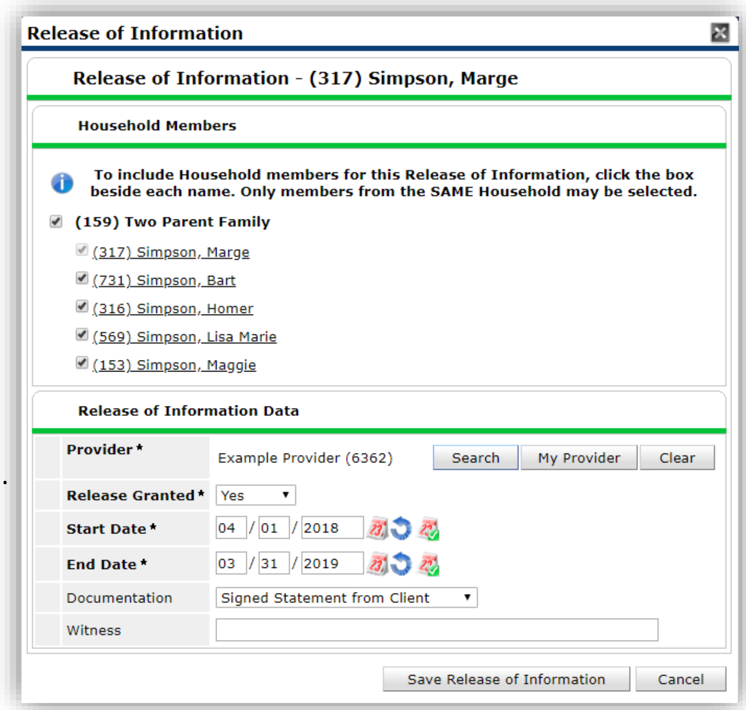
Yes = permission has been granted to share

Information. No = permission has not been granted.

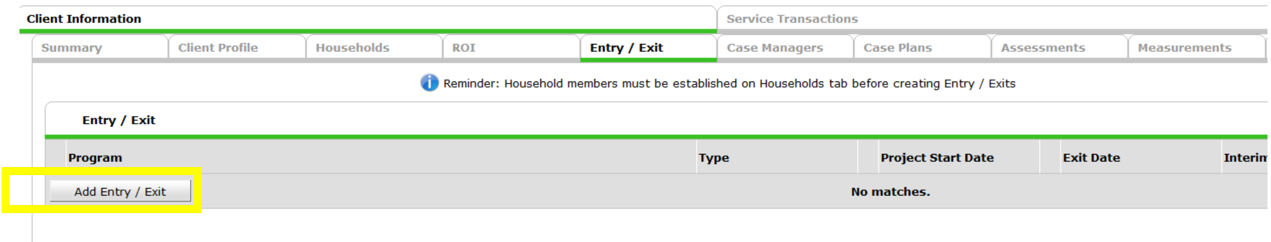
5. Start Date should match the signature date on

the form.

6. End Date should be one year from start date.



Entry/Exit



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

1. Click “Add Entry/Exit”.

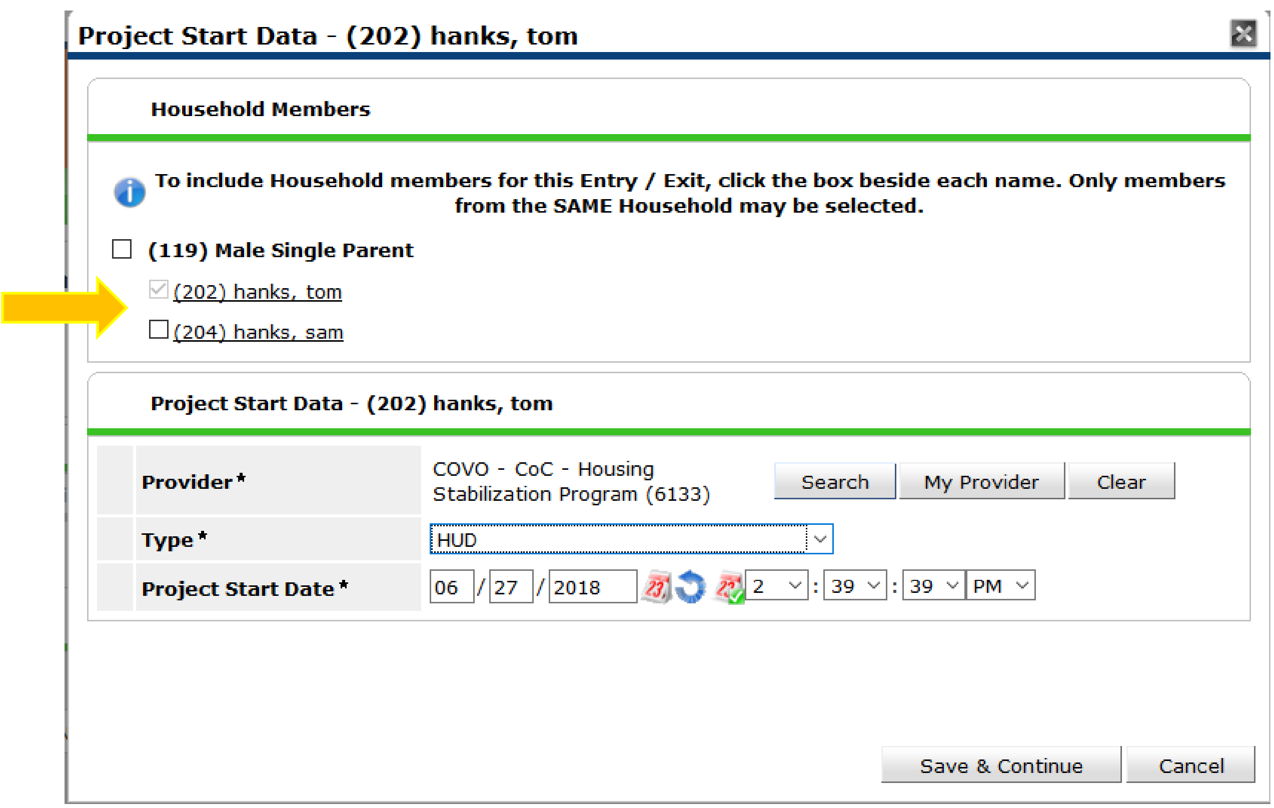
2. Select the household members that are receiving services from your program.

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.

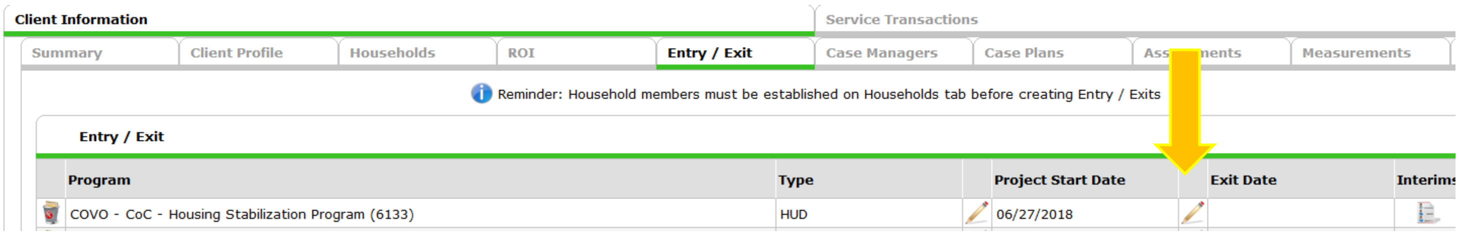
5. Project Start Date = when client(s) are enrolled into program.

6. Click “Save and Continue”.



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

Exiting a Client



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.