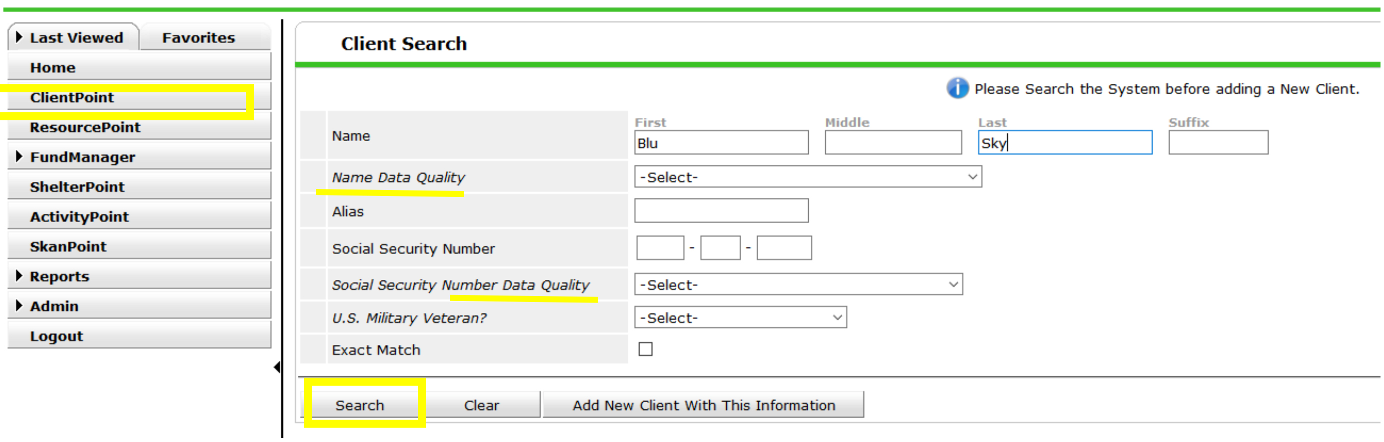
ServicePoint Data Entry & Exit – SHELTERPOINT

If your provider has "SHELTERPOINT" in the name, you must follow these instructions.

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

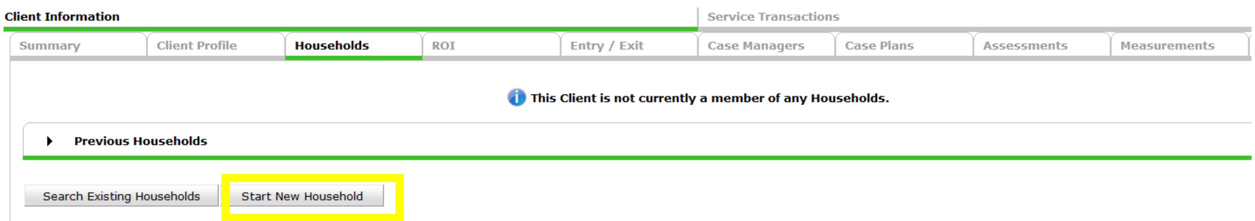
Tabs along the top can guide you through the data entry process. All programs require the following tabs to be completed: Client Profile, Households, ROI, and Entry/Exit. Check with your program director on any additional information you should be entering into ServicePoint.

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.

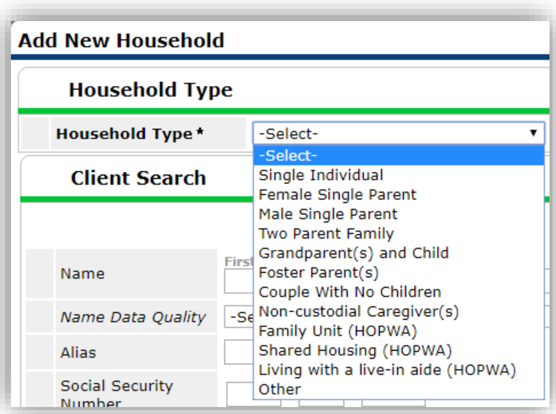
Households



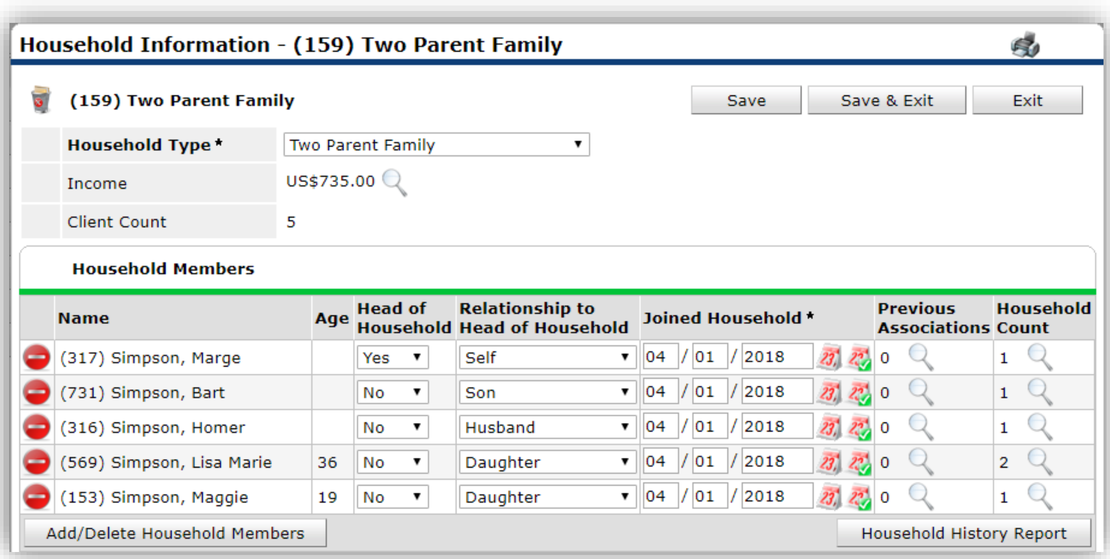
A few notes about households:

- 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.

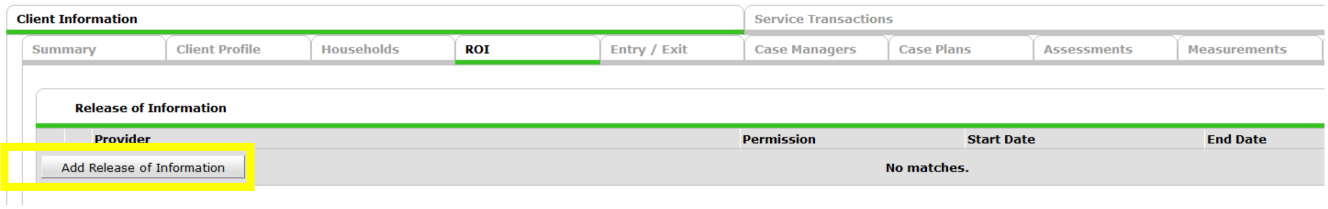
Starting a New Household:



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.

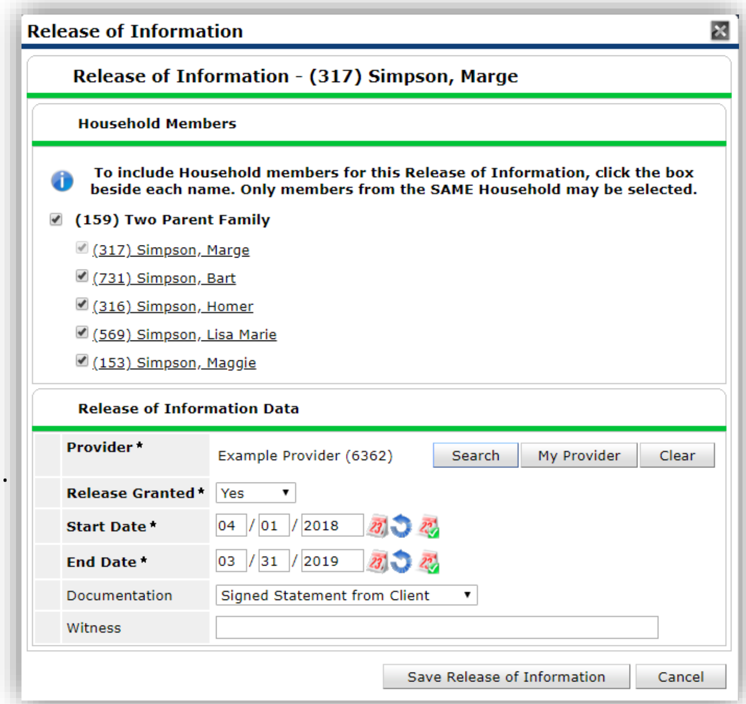
Yes = permission has been granted to share

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.



***SHELTERPOINT PROJECTS ONLY ***

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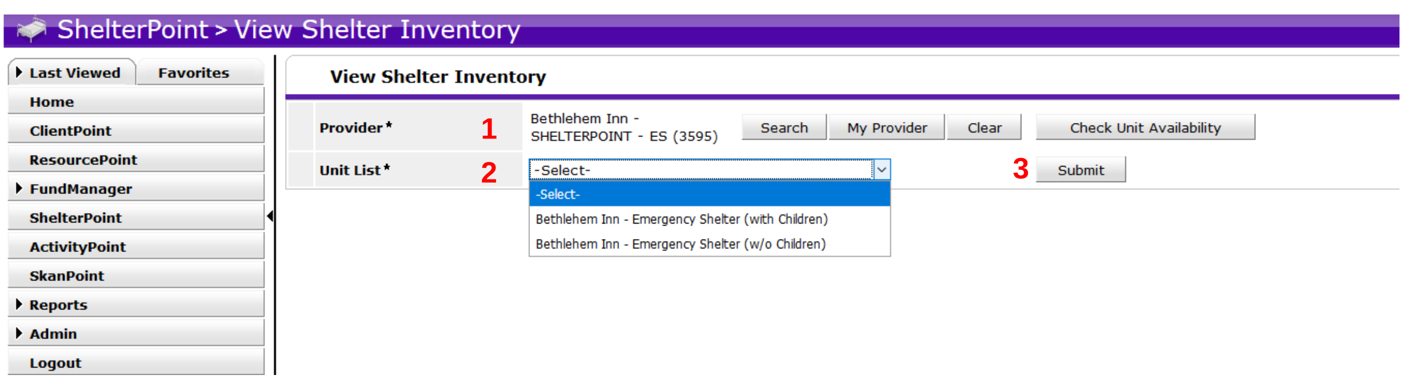
Do NOT proceed to the Entry/Exit tab. Go to the ShelterPoint module located in the menu on the left.

1. Select the correct Provider (should have "SHELTERPOINT" in the name).
2. Select the appropriate Unit List.
3. Click "Submit".

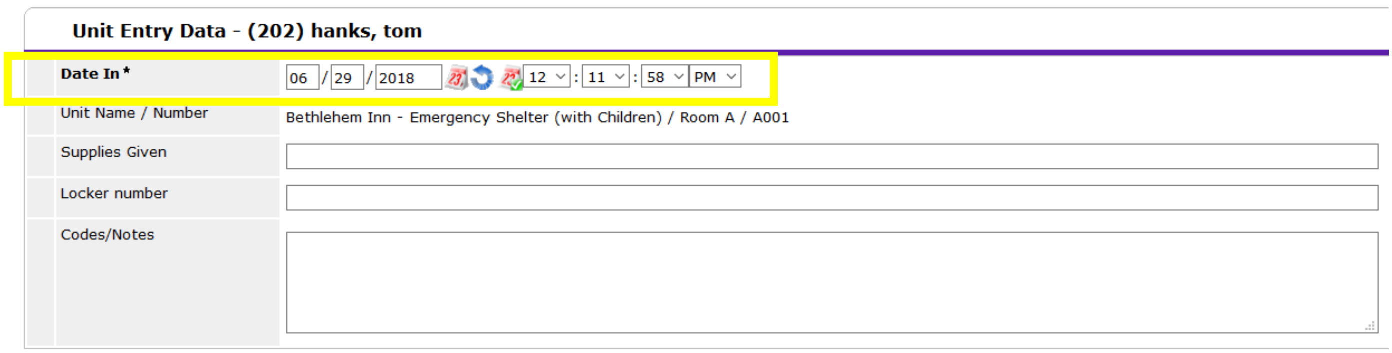


4. Click on “View All”. This allows you to see your full shelter inventory.

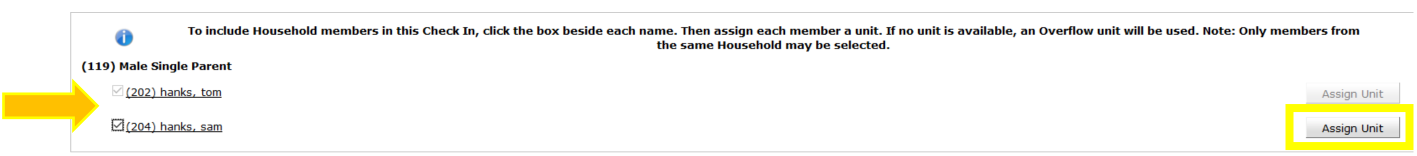
5. Click on the green plus sign to assign an individual or household to specific beds.

This will bring up the CLIENT SEARCH page. Search for the client you are assigning a unit. Click on the green plus sign.

Make sure the DATE IN is correct. ServicePoint defaults to current date:



6. Check all appropriate household members. For each additional household member, click on “Assign Unit”:



7. Click “Save & Exit”.

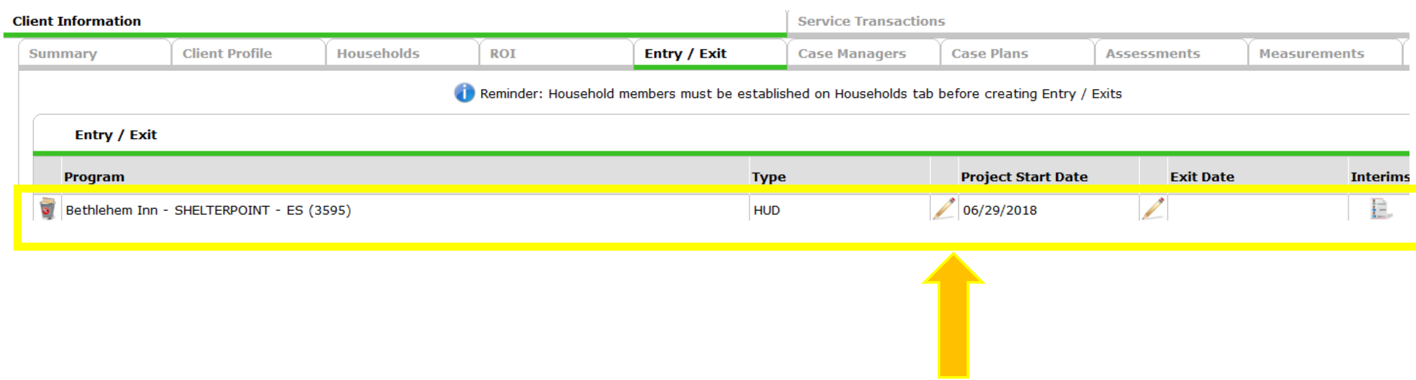
8. Return to the ClientPoint module to complete the assessment information and any finish any additional tab information (i.e. case managers, case plans, assessments, etc.).

Entry/Exit

This tab is where you will see your SHELTERPOINT enrollment.

1. Click on the pencil next to Project Start Date:

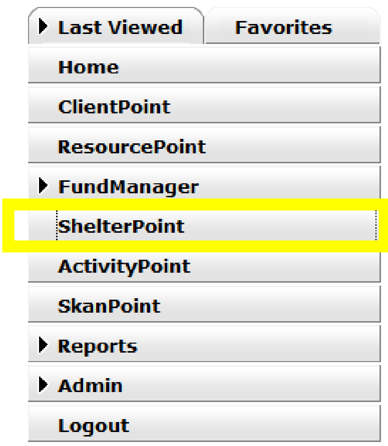
You will see a series of questions tied to your program. Please answer as completely as possible for each household member.



Exiting a Client

You will need to know the Reason for Leaving as well as the exit Destination.

1. Go to the SHELTERPOINT module:

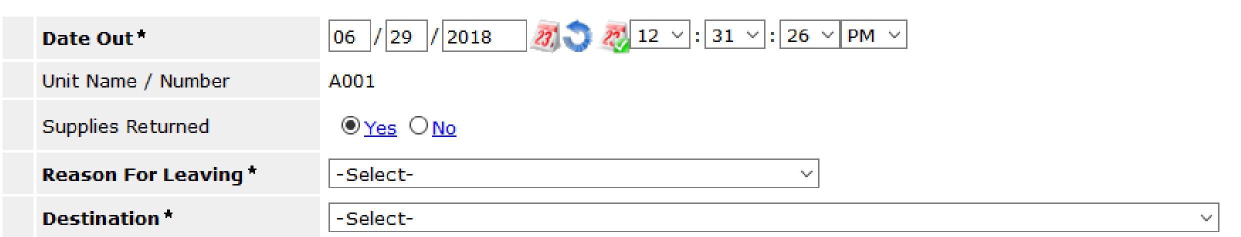


2. Choose your Provider and Unit List. Click Submit.

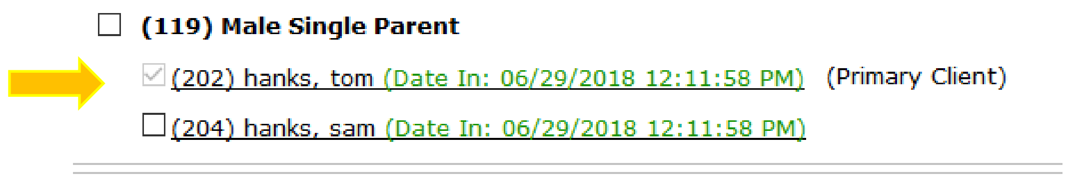
3. Click “View All”.

4. Click on the red button next to the client you wish to exit:

5. Select the Date Out, Reason for Leaving, and Destination:



6. Select all the household members that left on this date:



7. Click Save and Exit.