

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”

The screenshot shows the 'Client Search' interface. On the left is a navigation menu with 'ClientPoint' highlighted. The main area contains a search form with the following fields:

- Name: First (Blu), Middle, Last (Sky), Suffix
- Name Data Quality: -Select-
- Alias: [Text Field]
- Social Security Number: [] - [] - []
- Social Security Number Data Quality: -Select-
- U.S. Military Veteran?: -Select-
- Exact Match:

Buttons at the bottom include 'Search' (highlighted), 'Clear', and '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.

The screenshot shows the top navigation tabs. The 'Client Profile' tab is highlighted in green. A large yellow arrow points from the Client Profile tab towards the right, indicating the sequence of tabs to visit.

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

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

Name First

Name Data Quality

Alias

Social Security Number

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



Client Information					Service Transactions			
Summary	Client Profile	Households	ROI	Entr	Case Managers	Case Plans	Assessments	Measurements

▶ Last Viewed	Favorites
Home	
ClientPoint	
ResourcePoint	
▶ FundManager	
ShelterPoint	
ActivityPoint	
SkanPoint	
▶ Reports	
▶ Admin	
Logout	

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".

ShelterPoint > View Shelter Inventory

View Shelter Inventory	
Provider *	1 Bethlehem Inn - SHELTERPOINT - ES (3595) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> <input type="button" value="Check Unit Availability"/>
Unit List *	2 <input type="text" value="-Select-"/> 3 <input type="button" value="Submit"/>
	<input type="text" value="-Select-"/> Bethlehem Inn - Emergency Shelter (with Children) Bethlehem Inn - Emergency Shelter (w/o Children)



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.

	Date In	Floor	Room	Bed	Hold	Client
		Bethlehem Inn - Emergency Shelter (with Children)	Room A	A001	Hold	EMPTY

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:

Unit Entry Data - (202) hanks, tom

Date In * 06 / 29 / 2018   12 : 11 : 58 PM


Unit Name / Number Bethlehem Inn - Emergency Shelter (with Children) / Room A / A001

Supplies Given

Locker number

Codes/Notes

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

 To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(119) Male Single Parent

(202) hanks, tom

(204) hanks, sam






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.

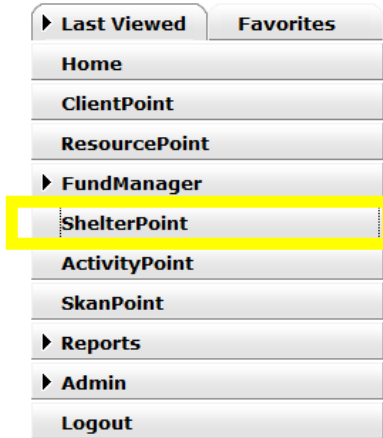
Client Information				Service Transactions				
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Measurements
 Reminder: Household members must be established on Households tab before creating Entry / Exits								
Entry / Exit								
Program	Type	Project Start Date	Exit Date	Interims				
 Bethlehem Inn - SHELTERPOINT - ES (3595)	HUD	 06/29/2018						



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:

	5/29/2018	Bethlehem Inn - Emergency Shelter (with Children)	Room A	A001	(202) hanks, tom
---	-----------	---	--------	------	------------------

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

Date Out *	06 / 29 / 2018    12 : 31 : 26 PM
Unit Name / Number	A001
Supplies Returned	<input checked="" type="radio"/> Yes <input type="radio"/> No
Reason For Leaving *	-Select-
Destination *	-Select-

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

(119) Male Single Parent



(202) hanks, tom (Date In: 06/29/2018 12:11:58 PM) (Primary Client)

(204) hanks, sam (Date In: 06/29/2018 12:11:58 PM)

7. Click Save and Exit.