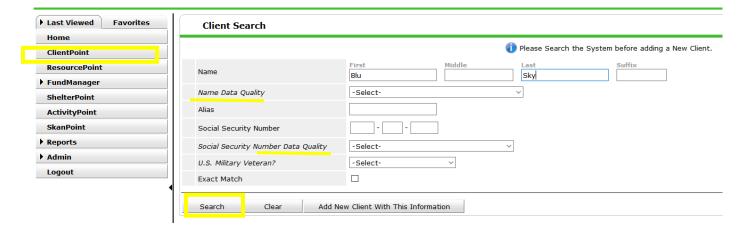
ServicePoint Data Entry & Exit – CLIENTPOINT

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

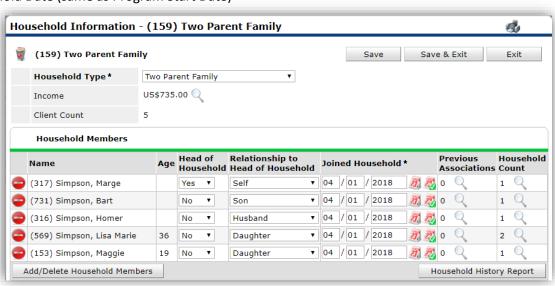


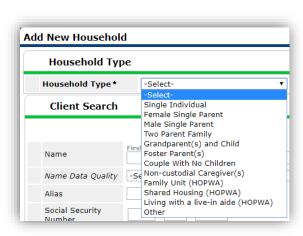
A few notes about households:

- Household "buckets" help you organize clients who commonly present together.
- Start a new household only 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
- Search and add additional household members (similar to search/create a record)
- 4. Click Continue
- 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)

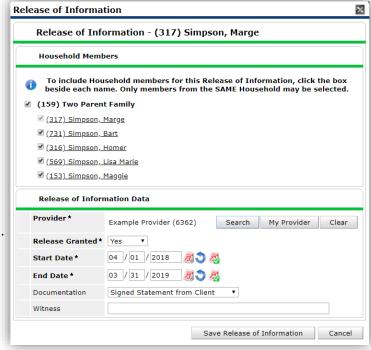


A few notes about ROIs:

- 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 shareInformation. 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.

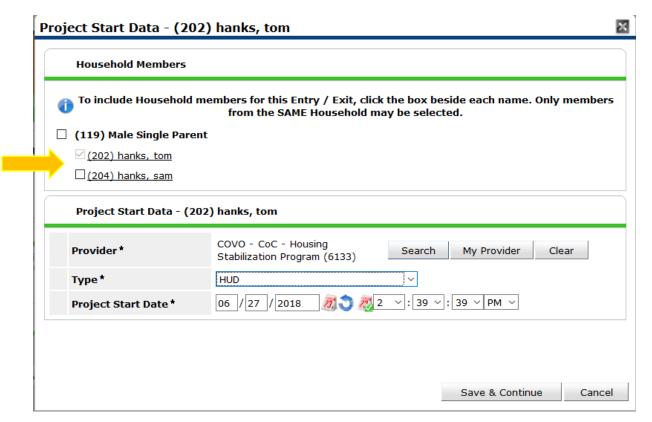


Entry/Exit



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.