Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 1

Client Search ~ Common Intake ~ Households ~ ROI

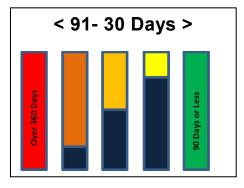


Icon Overview

Icon Overview refers to specific icons that are throughout SENC System.

٢	SerivcePoint Icon	SENC Partner Agency
4	Lock Icon	Agency Shared Information
ſ	UnLock Icon	Globally Shared Information
1	Edit Icon	Update / Change Current Information
1	Delete Icon	Remove enteries made in error- ONLY
୍ଦ୍	View Detail Icon	View Attachements
•	Select Icon	Add Selected Information
٢	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
23 Z	Date Selection, Reverse, Current Date Stamp Icon	Enter, clear a date or current date stamp {Date format: mm/dd/yyyy}
	Bed Icon	Shelter Bed Check In

Data Measurement Tool



Client Search- New & Existing Clients

First step is to search if the client has a profile. This process easily access through the ClientPoint search tool. You must always search for a client before entering a new one or add to an existing client profile.

Here are some helpful hints to remember when searching for a client:
If you search for both First and Last Name you will be doing an 'and' search—the client must have both a first name and last name to be found.
When searching for a SS#, you are searching for the digits that make up that social security number.
When you search for a name AND n SS#, the system performs an 'or' search between the Names 'or' the SS#.
In addition to searching for the names you enter, *ClientPoint* also searches using a "soundex." This means results will be displayed that "sound" like the name you entered. If you want to turn this feature off, select the checkbox to the right of Exact Match. (2)

1. Click the ClientPoint tab on the navigation toolbar. The screen will display the Client Search screen.

Note: If a client has a <u>Client ID</u> card, you can simply scan the card using the scanner that is connected to your system. The screen will refresh and the Client ID will be entered automatically. (See Figure 1-1) The click Submit to enter client profile. (See Figure 1-4)

Last Viewed Favorites	Client Search									
Home		👔 Please Search the System before addin	a a New Client							
ClientPoint			-							
Resourceroine		🚺 Items in Italics are for Data Entry ONLY and will not	be used for Search Results.							
▶ FundManager	Name	First Middle Last Suffix	_							
ShelterPoint		Ban								
ActivityPoint	Name Data Quality	-Select-	Date of Birth							
SkanPoint	Alias		DOB Data Quality	-Select- ~						
▶ Reports	Social Security Number		Gender	-Select-						
▶ Admin Logout	Social Security Number Data Quality	-Select- ~ 2	If Other Gender, specify							
Logour	U.S. Military Veteran?	-Select-	Primary Race	-Select-						
	Exact Match		Secondary Race	-Select-						
	Search ACTIVE Clients	•	Ethnicity	-Select-						
	Search INACTIVE / DELETED Clients	0								
	Search ALL Clients	0								
3 →	Search Clear Add New Client With This Information Add Anonymous Client									
	Client Number									
4	Enter or scan a Client ID number to go directly	y to that Client's profile.								

Figure 1-1

2. Simply enter a person's name or any other key data — Alias, Date of Birth, or SS# — into the Search fields. (1) & (2)

Note: When searching for a client- less is more. For example, if you type in last name "Ban". This will avoid duplication if the name(s) were spelled differently during initial intake.

Note: Secondary Race is not collected. Leave blank.

- 3. Click Search to return a list of possible matches. (3) The screen will refresh to show a possible list of matches. (See Figure 1-
- 4. If there is a match, you can type the Client ID # directly into the text field, (4) —and click Submit. (5) To open Client Profile

screen or click on the **Pencil** icon *L* next to the name to open prefix. Go <u>Common Intake</u> on page 5. (See Figure 1-7)

	•	Client Results									
		ID	Name 🔺	Social Security Number	Date of Birth	Alias	Gender		Household Count		
	/ 💈	2 12	Monster, Cookie	***-**-1113	03/03/1987		Male		ο 🔍		
	🧷 💈	2 13	Rabbit, Roger	***-**-1114	04/04/1986		Male		0 🔍		
	🦯 薯	🏚 3	test, Baby		01/02/2010		Male		1 🔍		
	/	2	test, Just A	***-**-8888	01/01/1976		Transgender		1 🔍		
Figure 1-2	1	2 10	Trainer, Sioux	***-**-1111	01/01/1988		Female		ο 🔍		
	2 💈	2 11	Tree, Peach	***-**-1112	02/02/1988		Female	Indefinite	1 🔍		
		16	Tree, Plum		01/01/2001		Male		1 🔍		
				Sha	wing 1-7 of 7						

5. If client's names DOES NOT appear in the list, follow 'Adding New Client' process on page 4

Existing Client

Click on the client **Name** or **Edit** icon Anter to client name. (See Figure 1-2) The screen will refresh and display the Client Profile screen. Follow *Completing Common Intake* process on page 6.

Adding New Client

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

1. If the search results do not include your client's name, a new client record will need to be created. (1) & (2) Enter as much additional information as you have available. First Name, Middle Name, Last Name, SSN, Alias, and Veteran status are important because these are the elements that comprise the client's unique ID.

Note: A unique id is assigned to each client to help prevent client duplication in the ServicePoint database.

_	Client Search	
		() Please Search the System before adding a New Client.
		🚺 Items in Italics are for Data Entry ONLY and will not be used for Search Results.
-	Name	First Middle Last Suffix Bruce Henry Banner
	Name Data Quality	Full Name Reported ✓ Date of Birth 06 / 15 / 1970 ∅ 3 3 ∅
	Alias	Green Man; Hulk DOB Data Quality Full DOB Reported (HUD)
	Social Security Number	123 - 85 - 6789 Gender Male ~
	Social Security Number Data Quality	Full SSN Reported (HUD) If Other Gender, specify
-	U.S. Military Veteran?	No (HUD) V Primary Race White (HUD) V
	Exact Match	Secondary Race -Select- ~
	Search ACTIVE Clients	Ethnicity Non-Hispanic/Non-Latino (HUD) >
	Search INACTIVE / DELETED Clients	0
	Search ALL Clients	0
	Search Clear Add Nev	Client With This Information Add Anonymous Client
	Client Number	
	iter or scan a Client ID number to go directly	r to that Client's profile. Submit

Figure 1-3

Once you have completed this information, click Search. Click Add Client With This Information. (3) An alert will appear. (See Figure 1-4)

	Client Search						
			0	Please Search the System	n before adding	a New Client.	
			🚺 Items in Ital	lics are for Data Entry ONL	Y and will not i	be used for Search Results.	
	Name	First Bruce	Middle Henry	Last Banner	Suffix		
	Name Data Quality	Full Name Reported		\sim		Date of Birth	06 / 15 / 1970 🔊 💐
	Alias	Green Man; Hulk				DOB Data Quality	Full DOB Reported (HUD)
	Social Security Number	123 - 85 - 6789				Gender	Male ~
	Social Security Number Data Quality	Full SSN Reported (HUD)	~]		If Other Gender, specify	
	U.S. Military Veteran?	No (HUD)	~		_	Origano (Dago	White (HUD)
	Exact Match			lient Information	. /=	×	-Select-
	Search ACTIVE Clients	۲	all the possib	to add a New Client to the le matches before continui	ng this process). Continue with	Non-Hispanic/Non-Latino (HUD) \vee
	Search INACTIVE / DELETED Clients	0	L	Add New Clie	nt?		
	Search ALL Clients	0		_	Ok	Cancel	
	Search Clear Add Ne	w Client With This Informati	ion Add Ano	nymous Client			
Figure 1-4						4	
	Client Number		3				
	Enter or scan a Client ID number to go direct	ly to that Client's profile.					
	Client ID #	Submit					

3. Click **OK** to continue. (4) The screen will refresh and display a new client profile.

The client is now part of SENC

^

4. Click the **Edit** icon next to the Client Record. (5) A popup box will appear on the screen. (See Figure 1-5) Complete any unanswered questions. Click **Save** to return to the Client Profile screen. (6)

ShelterPoint	Client Information				Service Transactio	ns		
SkanPoint	Client Profile	Households	ROI Entr	y / Exit	Case Managers	Case Plans	Assessments	Summary
Admin	Client Reco	rd					Issue ID Card	
Logout	Name Name Data Qua Alias Social Security SSN Data Quai U.S. Military Ve Age Client Dem Date of Birth Date of Birth Date of Birth Date of Birth Primary Race Secondary Race Ethnicity	ty teran? ograph pe	Editing the Client Recor Record First Bruce Full Name Reported Green Man, Hulk 123 - 45 - 6789 Full SSN Reported (HUD)	Client Searc				Change Clear
							Save Sa	ive & Exit Exit
			Figu	e 1-5				

5. Click the **Edit** icon Anext to the Client Demographics. (7) A popup box will appear on the screen. (See Figure 1-6) Complete any unanswered questions. Click **Save** to return to the Client Profile screen. (8)

Note: Strive to complete as n	any fields as	possible for data	quality.
-------------------------------	---------------	-------------------	----------

ShelterPoint		Client Information				Service Transaction	ns		
canPoint		Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary
eports									
dmin		🦯 Client Reco	ord					Issue ID Card	
gout		Name	Banner, Bruc	e Henry					
		Name Data Qu	ality Full Name Re	ported					
		Alias	Green Man, I	Hulk					
		Social Security	123-45-6789)					
		SSN Data Qual							Change Clear
		U.S. Military Ve	teran? Client De	emographics			×		
		Age		A Editing the Cl and the Clien	lient Demographic Information	could affect the Unique	ID		
7	┝	Client Dem	ographi Clien	t Demographics			<u> </u>		ſu
_	-	Date of Birth			_				
		Date of Birth Ty	pe Date o	f Birth	06 / 15 / 1970 🥂	🕽 🥂 G			
		Gender	Date o	f Birth Type	Full DOB Reported (HUD)	~ G			
		If Other Gender,	Gender		Male	~ G			
		specify	If Othe	r Gender, specify			G		
		Primary Race	Primary	/ Race	White (HUD)		G		
		Secondary Race	Second	dary Race	-Select-	~	G		
		Ethnicity	Ethnici		-Select	~ G	·		
				-,	8 ->	Save	Cancel	Save Sa	ve & Exit Exit
	•					aure 1-6			<u>^</u>

Note: Secondary Race is not required

6. Move to Completing Common Intake on page 6.

Completing Common Intake

The Common Intake is a questioniare that must be completed **ONLY** for adult clients (18+). This will ensure common and accurate data is shared througout the SENC. This information is shared among Partner Agencies.

1. Once you have completed the Client Record and Client Demographics - scroll down to the *Common Intake (SENC).* (1) Information previously collected will auto populate. Use drop down arrows – complete questions. (2) (See Figure 1-7)

Common Intake Form (S	enc,			
COMPLETE FOR ALL ADULTS				
*Note: If needed, please ente	r Household Inform			
Date of Birth*		01 / 01 / 1990 🕂 🎘 G		
Gender*		Female	~ °	
Primary Race*		American Indian or Alaska Native	(HUD) JG 2	
Ethnicity*		Hispanic/Latino (HUD) V	G C C C C C C C C C C C C C C C C C C C	
Marital Status*		Separated V G		
Highest Level of Educatio	n Attained *	11th grade (HUD) 🗸 🗸		
Address Information				
Current Address	Туре	Street Address	Apartment / Unit Number	City
Add			No matches.	
Contact Method		Phone Number (e.g. : 605-222-1212)	Send information via text?	Idress
Add				
Does the client have a dis	abling condition?*	-Select- V G		
Q Disabilities				
		Start Date*	Note on Disability	
Disability Type			No matches.	
Disability Type Add				
	tion			
Add	tion Type of Emp	loyment*	Employer Name	

Figure 1-7

Address Information

- 1. Click **Add** in the Client Address Information. (1) A popup box will appear on the screen. (See Figure 1-8) Complete all questions in **bold**. (2) If client is *homeless* **ONLY** complete Address Type.
- * Complete landlord information if available.

	Ethnicity*			1
	Marital Status*	Address Informatio	on	
	Highest Level of Education Attained	Current Status	Yes V G	
	Address Information	Address Type	Both - Physical / Mailing 🗸 G	
	Current Address Type	Street Address	200 N Paul Lane G	her
	Status Address Type	Apartment / Unit Number	A124 G	
	Add Add	Zip Code	57106 Apply ZIP Code Information G	of:
		City	Sioux Falls	
	Contact Method	County of Residence	Minnehaha G ALWAYS CLICK - Information This w	<u>Apply ZIP Code</u> vill auto fill information.
		State	South Dakota 🗸 G	/
	Cell Phone	Reason for Leaving this Residence	-Select- V G	of:
				P
		Landlord's Name	G	
	Does the client have a disabling co	Landlord's Address	G	
	Q Disabilities	Landlord's City	G	
Figure 1-8	Disability Type	Landlord's State	-Select- V G	abi
	Add	Landlord's Zip Code	G	
	Employment Information	Landlord's Phone	G	
	Current Status*	Address Data Quality	-Select- V G	-
	Ves	Reported Date	01 / 18 / 2017 🕂 🎘 🔿 🦓 G	
	Add	Move-Out Date	// // // 🦓 G	of :
	Total Monthly Income*		Save Save and Add Another Cancel	[

Note: <u>Bold</u> sections are <u>required</u>. <u>Non-Bold</u> sections *if information is available*.

Entering Client Zip Code

1. Enter client zip code in the **Search** field. (4) A list of possible matches will appear. (5) Select correct match. Click Apply ZIP Code Information. (6) (See Figure 1-9)

Note: Apply ZIP Code Information populates the City, State, and County/Parish fields after a ZIP code is entered.

	Ĺ	Address Informatio	n	
		Current Status	Yes 🗸 G	
		Address Type	Both - Physical / Mailing 🧹 G	
		Street Address	200 N Paul Lane G	be
		Apartment / Unit Number	A124 G	
4	->	Zip Code	57106 Apply ZIP Code Information	6
		City 5	Sioux Falls, SD 57106 Sioux Falls (Shindler), SD 57106	
		County of Residence	G	na
		State	-Select- V G	
		Reason for Leaving this Residence	-Select- V	0
	-			



Zip Code Confirmation popup box will appear. Use the drop down arrow to change City or County/Parish- if necessary.
 (7) Click Yes to confirm information. (8) (See Figure 1-10)

Current Stat	us	Yes	∽ G	11
Address Typ	e	Both	- Physical / Mailing 🧹 G	
Street Addre	ess	200 N	Paul Lane G	be
Apartment / Number	Unit	A124	G	Ľ
Zip Code		57106	Apply ZIP Code Information G	of
City 7	IP Code	e Confi	rmation	E
County of Residence			llowing ZIP Code information correct?	na
State	ZIP C	ode	57106	.8
Reason for L Residence	City		Sioux Falls	of
	State		South Dakota 7	01
Landlord's Na	Count	y/Parish	Minnehaha, SD 🗸	18
Landlord's Ac			8 Yes No	÷
Landlord's City			G	14
Landlord's State	•	-Sele	ct- 🗸 G	at
Landlord's Zip C	Code] c	
Landlord's Phon	e		G	
Address Data Q	uality	-Sele	ct- v G	18
Reported Date		01 /	18 / 2017 🛛 🧖 💙 🦉 G	
Move-Out Date				of
			Save Save and Add Another Cancel	-8

3. Once the address information is complete- Click **Save** to exit screen or **Save and Add Another** to add an additional address. Click **Cancel** to return without saving changes.

Changing Address Information

*REQUIRED -- CHANGE CURRENT STATUS TO NO OLD ADDRESS - WHEN ADDING NEW **

1. Click the Edit icon ker address that is no longer current. (1) Select Current Status & Address Type (2)

If Current Status is: NO – Update -- Reason for Leaving this Residence- select from one of the options. (3)

Enter Move-Out date. (4) (See Figure 1-11)

	Ethnicity*			
	Marital Status*	Address Information	วท	
	Highest Level of Educ	Current Status	No 🗸 G	
	🔍 Address Informat 🛛 🗖	Address Type	-Select- Yes G	
	Current Address Type	Street Address	No Lane G	ber City
$1 \rightarrow$	Ves Both - Physical /	Apartment / Unit Number	A124 G	Sioux Falls
	Add	Zip Code	57106 Apply ZIP Code Information G	of 1
	Contact Method	City	Sioux Falls G	
	Contact Method Type	County of Residence	Minnehaha G	nation Email Address
	Cell Phone	State	South Dakota V G	
	Add	Reason for Leaving this Residence	-Select- V G	of 1
	3			
		Landlord's Name	G	
	Does the client have a disabling co	Landlord's Address	G	
	Q Disabilities	Landlord's City	G	
	Disability Type	Landlord's State	-Select- VG	ability
	Add	Landlord's Zip Code	G	
	C Employment Information	Landlord's Phone	G	
	Current Status*	Address Data Quality	-Select- V G	
	🖉 🗑 Yes	Reported Date	01 / 18 / 2017 🧖 🔿 🦓 G	
	4 ->	Move-Out Date	/// C	of 1
	Total Monthly Income*		Save Save and Add Another Cancel	
	Covered by Health Insurance*	I P	Vac (HUD)	er

Figure 1-11

2. Click Save or Save and Add Another to add the new address.

Adding Contact Method ** <u>REQUIRED</u> – PHONE NUMBERS MUST INCLUDED DASH(S) **

1. Click **Add** in the Contact Method section. (1) A popup box will appear on the screen. (See Figure 1-12) Use drop down arrow to complete information. (2) Click **Save** to return to the Client Profile screen. (3)

ſ	🔍 Contact Method		Contact Method		<i>i</i> 🕯 🔒
	Contact Method Type	٢	Contact Method Type	Cell Phone 🗸 G	Note: Send information via text should ONLY be answered if client
$1 \rightarrow 0$	Add 2		Phone Number (e.g. : 605-222-1212)	608-941-3730 G	provides a <u>cell phone</u> <u>number.</u>
			Send information via text?	Yes v K	
	Does the client have a disabling condition?*	L	Email Address	Coolkid2001@hotmail.com	G
	Q Disabilities		Start Date*	12 / 28 / 2016 🛛 🔊 💐 G	
	Disability Type		End Date	// / 👸 🖏 G	
	Add		Print Recordset	Save Save and Add Ar	nother Cancel
ure 1-12	^			3	

Note: If client does not have a phone - Select No Phone

Fig

3. Click Save or Save and Add Another to add a new Contact Method.

Changing Client Contact Method

REQUIRED - ENTER END DATE WHEN CONTACT METHOD IS NO LONGER ACTIVE

1. Click the Edit icon Appendix to the Contact Method Type to change or update information. (1) A popup box will appear on the screen. (See Figure 1-13) If contact information is no longer current - Enter End Date. (2)

	🔍 Contact Method	Contact Method	<i>&</i> 1
	Contact Method Type	Contact Method Type	√ G
	Add	Phone Number (e.g. : 605-222-1212) 608-941-3730	G
		Send information via text?	
	Does the client have a disal	Email Address Coolkid2001@	hotmail.com G
	Q Disabilities	Start Date* 12 / 28 / 20	16 🛛 🔊 🖏 G
Figure 1-13	Disability Type 2	End Date 06 / 28 / 20	18 🛛 🖏 🖏 G
	Add	Print Recordset Save	Save and Add Another Cancel

2. Click Save or Save and Add Another to add new contact information.

Disabilities

Use the drop down arrow to complete Disabling Condition question. (See Figure 1-14) (1) Select the appropriate response. If <u>yes</u> - Click Add in the Disabilities Type section. (2) Go to step 2. For all other responses, follow Employment Information process on page 9.

1 -> Does the clie	nt have a disabling condition? Yes (HUD)	∽ G
🔍 Disabili	ties	HUD Verification 🔔
Disability Ty	De Client doesn't know (Above condition is going to be long term?
	Client refused (HUD) Data not collected (H	D)

Figure 1-14

Once you have clicked Add. A popup box will appear on the screen. (See Figure 1-15) Select the Disability Type that best fits the client. (3) Complete all questions in **bold** and <u>Non-Bold</u> sections *if information is available.* (4)

Client's Residence / Last Permanent Add	ress Edit Recordset - (17)	Ranner Bruce Henry	X	1		
Client's Street Address		baimer, bruce nemy		's City	Client's State	Current Residence
🥖 🧋 1919 America Street	Disabilities		<i>*</i> 🔒	alls	South Dakota	Yes
2000 S. Beach Drive 3	Disability Type	Hearing Impaired	6	ird	South Dakota	No
Add	Disability determination	-Select-		2		
Contact Method Contact Method Type Contact Method Type Contact Method Type Contact Method Type Contact Method C	If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select-			Send informa	tion via text?
Cell Phone Add	If Yes, Documentation of the disability and severity on file	-Select- 🗸 G			Yes	
Does the client have a disabling condition?	If Yes for Mental Health Problem, Alcohol Abuse, Drug Abuse, or Both Alcohol and Drug Abuse, How confirmed (PATH only)	-Select-	ه م د			
Dis 4 e	If Yes for Mental Health Problem (PATH only) Serious mental illness (SMI) and, if SMI, how confirmed	-Select-			te as needed or leav cting the Set to Curr	
Add	(If yes)Currently receiving services or treatment?	-Select-	Date ic	on 👋 nex	t to start date.	
1	Start Date*	06/26/2016 🙇 🕽 🦉 🚽 👘				
Type of Employment Add Total Monthly Income	Note on Disability	G			Current emplo	iyer?
Covered by Health Insurance	Above condition is going to be long term? End Date	G / Ø / Ø 				Cancel
	Print Recordset	Save Save and Add Another	Cancel			
Client Notes		Figure 1-15				

3. Click Save or Save and Add Another to add new Disability.

Employment Information

1

1. Click Add in the Employment / Income Information (Reitred, SSDI, all income sources) section. (1) A popup box will appear on the screen. (See Figure 1-16) Complete all questions. (2)

Reported Date	Current Status	Type of Employment	Employer Name	Em	ployment End Date	Overall Total Monthly Incon
2 👿 04/20/2017	Yes	Full Time	Mernards			US\$2,200.00
2 👮 03/29/2017	No	Full Time	Sioux Falls Ford			US\$1,500.00
Add			Showing 1-2 of	2		
ealth Insurance						
Covered by Health Insurance*		Yes (HUD)	✓ G			
						Cancel
			Figure 1-16			
			Figure 1-16			
	Employment Reported Date		ion (Retired, SSDI, all inc	ome sources)	
		/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	
	Reported Date	/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	
	Reported Date Iloyment	/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	
Emp	Reported Date <u>oloyment</u> Current Status	/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	
2	Reported Date <u>loyment</u> Current Status Type of Employi	/ Income Informat	ion (Retired, SSDI, all inc	come sources)	
2	Reported Date <u>loyment</u> Current Status Type of Employr Employre Name Employment End	/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	
2 - Emp	Reported Date <u>loyment</u> Current Status Type of Employr Employre Name Employment End	/ Income Informat	ion (Retired, SSDI, all inc	ome sources)	

Note: "Income" does not

3. Click Save or Save and Add Another to add new Employment information.

Changing Employment Information

*REQUIRED -- CHANGE CURRENT STATUS TO NO ON OLD EMPLOYMENT - ADDING NEW.**

1. Click the Edit icon next to the employment that is no longer current. (1) Change Current Status- No (2) Enter End date. (3) (See Figure 1-11)

	🥢 🥡 Hearing Impaired	03/29/		Unable to hear out of	the left ear	
	Add	Edit Recordset - (324) Test,	Helpline Center	R		
	C Employment / Income Info	Employment / Income I	nformation (Retired, SSDI, all income so	ources) 🎄 🚹		
	Reported Date	Reported Date	04 / 20 / 2017 🧖 🔿 🦧 G		Employment End Date	Overall Total Monthly Income
$1 \rightarrow$	2 👰 04/20/2017	Employment				US\$2,200.00
	03/29/2017		Yes V G			US\$1,500.00
	Add 2		Full Time V G	- 1		
	Health Insurance	Employer Name	Mernards G			
	Covered by Healt 3	Employment End Date	//			
		Income (Retired, SSDI, all income	sources)			Cancel
		Overall Total Monthly Income	2200 G			
		Print Recordset	Save Save and Add Another	Cancel		
			Figure 1-17	4		

- Click Save or Save and Add Another to add new Employment information.(4) Click Cancel to return to the previous screen without retaining the changes. DO NOT change Overall Total Monthly Income → Update income on new employment.
- 3. Overall Total Monthly Income should reflect current amount with new employment information. (See Figure 1-17)

Health Insurance

1. Select from the drop down box to reflect the clients Health Insurance status.

Health Insurance	
Covered by Health Insurance *	Yes (HUD) V G
	Figure 1 – 18

Note: "Covered by Health Insurance" includes: Medicaid, Medicare, Affordable Care Act, Private Insurance, and Military

Client Notes ** Do not delete Client Notes always enter NEW Client Note**

1. Click the Add New Client Note in the Client Notes section. (1) A popup box will appear on the screen. Enter client information that is valuable to process of serving the client. (2) Click Save. <u>Client Notes are shared Globally.</u>

	Type of Employment		Employer Name			Current employer?
	🥖 🦉 Full Time	Note		23		Yes
	🥖 🧋 Part Time	1		1		No
	Add	Add a Nev	/ Client Note - (17) Banner, Bruce Henr	Y Showing 1-	-2 of 2	
	Total Monthly Income	Note Date*	06/26/2016 🕂 🖏 🎝 🦉			
	Covered by Health Ins	Notes	Bruce is hard of hearing on the left side. Bruce lives alone and has a companion dog na			
	2	7	Bruce lives alone and has a companion dog na Rex.	med		Cancel
						Cancer
	Client Notes					
	Provider					Full
	Add New Client Note Print			Noma	atches.	NOU
\rightarrow				Noma	ittlies.	
	File Attachments					
	Date Added -			Provider	Added From	
	Add New File Attachment		Save Can	Cei No ma	atches.	

2. Click the Edit icon 🖉 to edit a Client Note. Click Save to exit. If necessary - Click Print to print copy of the Client Note.

File Attachments ** DO NOT ADD ROI IN THIS AREA --- ALWAYS USE ROI TAB**

1. Click the Add New File Attachment in the File Attachment section. (1) A popup box will appear on the screen. Enter Description of file. Click Browse. (2) Attached the file from your computer. Click Upload. File Attachments are shared Globally.

010104	Client Notes				HINT: The ONLY way to see if another agency has added an ROI is to look in the File
	Provider	Not	te Date	Note Preview	Attachments area
	🥖 🧋 7 Day Shelter Program - St. Francis House	06	5/26/2016	Bruce is hard of hearing on the left si	
	Add New Client Note Print	Upload Attachment	×	Showing 1-1 of 1	Added Form SHOULD say
	File Attachments 2	Name * BrowseN file selected. Description Drivers License Copy		Provider Added From	ROI. If not, double check the scanned copy to see if it an ROI or another document.
≫ [Add New File Attachment		.:	No matches.	NOTE: You cannot see other agencies attached ROI's in the ROI Tab you must look
	Start Date End Date Incident Add New Incident	Upload Ca	ancel	Provider No matches.	in the File Attachments area.
_					Save Save & Exit Exit

2. Click Upload to add file. Click Cancel to return to the previous screen without retaining the changes.

File Attachments							
Date Added 🔻	Name	Description	Туре	Provider	Added From		
2 🗑 🔍 06/26/2016	211.jpg	Drivers License Copy	jpg	7 Day Shelter Program - St. Francis House	Client Profile	ſ	
Add New File Attachment	Id New File Attachment Showing 1-1 of 1						

Figure 1-20

3. Once the file has been uploaded to the File Attachments section you can see the attachment by clicking the View icon 🔘

4. Click the **Edit** icon *K* to edit the description if necessary.

Incidents ****ONLY USED IF SAFETY IS A CONCERN****

- 1. Click the Add New Incident in the Incidents section. (3) A popup box will appear on the screen.
- 2. The Provider will default to the user's current provider. The Start Date default to the current date.
- 3. Select the type of **incident** and **Incident Code** (if necessary) from the drop down box. Enter **Staff name**, **Site Barred From** and add **Notes** to include further information regarding the Incident. (4) <u>Incidents are shared Globally.</u>

	C Employment Information	Incident 🦪 🛛		
	Type of Employment	Add a New Incident - (17) Banner, Bruce Henry	Current employer?	
Figure 1-21	Full Time Part Time Add Total Monthly Income Covered by Health Insurance Client Notes Provider Y 2 Day Shelter Program - St. France Add New Client Note Print	Provider * 7 Day Shelter Program - St. Francis House (17) ↓ Start Date * 06//26//2016 20 % End Date * 06//26//2016 20 % Incident Disagreement with rules/persons ↓ Incident Code 001 ↓ Ban ○yas ●No Staf Person Straff Person Sites Barred From St Francis House	F2 Cancel F1	
	File Attachments Date Added ~ Image: Constraint of the state o		Added From Client Profile	
	Incidents Start Date End Date Incident	Incident Code Provider	Ban Site Staff	
3 ->	Add New Incident	Incident Code Provider No matches.	Ban Site Starr	
			Save Save & Exit Exit	

4. Click Save to exit screen

Client Households

Creating a household is an easy way to assign services to a group of people. Households are typically configured in family units with one person as the head of the household. When other members are added to the household, they are identified by their relationship to the Head of Household. Creating a household makes it faster and easier to record data in *ServicePoint*. By grouping client records together the user may update or provide services, enter a Release of Information (ROI), or create an entry for all household members in one action, thereby eliminating the need to individually create entries for each member receiving services.

First step is to search if the client is part of an existing household. This process can be easily accessed through the Household tab. You must always search for an existing household before entering a new one or adding to an existing household.

- 1. Click the Households tab. (1) the screen will display two options <u>Search Existing Households</u> or <u>Start New</u> <u>Household</u>.
- 2. Click Search Existing Household. (2) Use keywords for Client Names, Client ID #, or Full Social Security Numbers of Clients already in a Household into the Search field. (3)

Note: When searching for a client- less is more. For example, if you type in last name "Ban". This will avoid duplication if the name(s) were spelled differently during initial intake.

ClientPoint > Clier	nt Profile		Hou	usehold Se	arch						ch
Last Viewed Home	Client - (17) Banner, Bruce Henry			Household Search 3						Ì	
ClientPoint	🗧 🧋 (17) Banner, Bruce Henry			Search for a Household by using keywords for Client Names, Client ID, or Social Security Numbers of Clients already in a Household.							Γ
ResourcePoint	Release of Information: None			arch Ban					Show Advanced Search		he
ShelterPoint	Client Information	V	1-								ľ
SkanPoint	Client Profile	seholds RC		Search	Clear						t
• Reports • Admin	•		1 –	Househ	old Results						t
Logout		4		Household				Head of H	lousehold	Client	l
Previous Households				ID L	Female Single	Parent		test, Just A		2 Q	L
2	2 Search Existing Households Start New Household				Showing 1-1 of 1						l
_		Current Clients - (1) Fer	nale Single	Parent			×	Add NEW Household	Cancel	ł
Legal Notices	Y	Household Memi	bers								I
		Name	Age	Head of	Relationship to Head of Household		Previous Association:	Household Count			l
	$5 \rightarrow$	(2) test, Just A	40	Yes	Self	04/18/2016	0 🔍	1 🔍			L
		(3) test, Baby	6	No	Son	04/18/2016	0 🔍	1 🔍			l
								Exit			

- Figure 1-22
- 3. Click **Search** to return a list of possible household matches. **(4)** The screen will refresh to show a possible list of household matches. (See Figure 1-22)
- 4. If there is a match, you can click **View** icon Household Search screen.
- 5. To open Client Profile screen click Select icon 🚯 next to the name to open prefix.

Creating a New Household

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

If the search results do not include your client's name or household, a new client household will need to be created. 1. (1) Click Add NEW Household. The Add New Household popup box will appear. Go to step 2.

ClientPoint > Clien	t Profile		Type here for Glob
		Household Search	×
Last Viewed Home	Client - <mark>(</mark> 17) Banner,	Household Search	
ClientPoint ResourcePoint ShelterPoint	(17) Banner, Bruce Henry Release of Information: No Client Information	Search for a Household by using keywords for Client Names, Client ID, or Social Security Numbers of Clients already in a Household. Search Banner Show Advanced Search	a -Switch t
SkanPoint > Reports	Client Profile	Search Clear	s Assessm
▶ Admin Logout		Household Results	
	Previous Househ Search Existing Househol	Household ID Type Head of Household Client Count No matches. Image: Add NEW Household Cancel	
Legal Notices	,	Einer d 20	

Figure 1-23

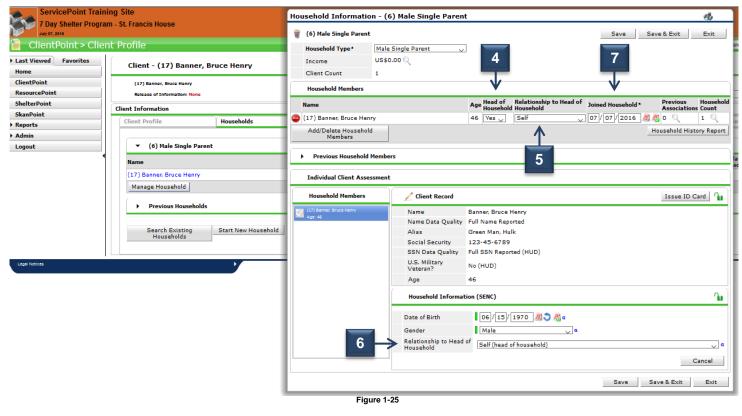
2. Select a Household Type from the pick list. (2) Your Client's name should appear at the bottom of the screen. (3) Click Continue. The Household Information popup box will appear. (See Figure 1-24)

SERVICE point* Connecting Your Community.		Add New Household				_	-	R	-
ServicePoint Traini 7 Day Shelter Progra July 07, 2016		Household Type	Male Single Parent						
ClientPoint > Clien	t Profile	Client Search	-Select- Couple With No Child						Type here for Glo
Last Viewed Favorites Home	Client - (17) Banner, B		Female Single Paren Foster Parent(s) Grandparent(s) and	em before a	dding a New Client.	Hide A		d Search	
ClientPoint	(17) Banner, Bruce Henry Release of Information: None	Name	Male Single Parent Non-custodial Caregi Other		Last Banner		Suffi	ix	-Switch
ResourcePoint ShelterPoint	Client Information	Quanty	Two Parent Family		~				June
SkanPoint Reports	Client Profile	Alias Social Security Number							Assess
Admin Logout	Previous Household Search Existing Households	Social Security Number Data Quality U.S. Military Veteran? Exact Match		~					-
Legal Notices	· · · · · · · · · · · · · · · · · · ·	Search Clear	Add New Clien	t With This Informatio	n Add Anonyn	mous Client			-
		Enter or Scan a Client ID to		s Household. bmit					
		Selected Clients	Social Security	Dete of grate	Alias	Caudaa Ba		Household	
	3 →	ID Name 17 Banner, Bruce Henry	Number	Date of Birth 06/15/1970	Green Man, Hulk	Gender Ba	definite	Count	
				Showing	g 1-1 of 1	Continue		Cancel	

Figure 1-24

- 4. Set the Head of Household indicator. (4) If this client is Head of Household, select Yes, otherwise select No.
- 5. Select Relationship to Head of Household from the pick list. (5) Complete Date of Birth, Gender, and Relationship to Head of Household in the *Household Information* area. (6) (See Figure 1-25)
- 6. The **Joined Household** defaults to the current date. (7) This is the date the client will be entered into the household. It is a required field.
- 7. Click **Save** and Click **Exit**. The user will be returned to the **Household Overview** screen. The newly added household will display. (See Figure 1-25)

Note: The Head of Household field defaults to "No." The field need only be altered for the Head of Household.



Adding Minor (Child) to Existing Household

Adding a minor into SENC - ONLY collect: full legal name, date of birth, gender

1. Click Households > Click Search Exiting Households > Enter minors name > Click Search > Enter Household Type. If Minor is not in the system – Click Add Client With This Information > Confirmation textbox will appear > Click Okay.

	Add New Household	×					
ing Site	Household Type						
1	Household Type * -Select-						
it Profile	Client Search						
Client - (1) Banner, Bruce Henry	 Please Search the System before adding a New Client. Hide Advanced Search Items in Italics are for Data Entry ONLY and will not be used for Search Results. 	sh					
(1) Banner, Bruce Henry Release of Information: None	Name First Middle Last Suffix Banner						
Client Information	Name Data Quality Date of Date of Birth						
	Alias DOB Data Quality -Select-]					
Previous Households	Social Security • • Gender -Select-	~					
Search Existing Households Start New Household	Social Security Number Data Quality If Other Gender, specify						
	U.S. Military -Select- V Primary Veteran? -Select	~					
	Exact Secondary Race -Select-	~					
	Ethnicity -Select- v						
	Search Clear Add New Client With This Information Add Anonymous Client						

Add Adult Client to Existing Household

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

1. Click **Manage Household** on the Household Overview screen. (1) The Household Information popup box will appear. Click **Add/Delete Household Members**. (2) The **Add/ Delete Household Members** screen will appear. (See Figure 1-26)

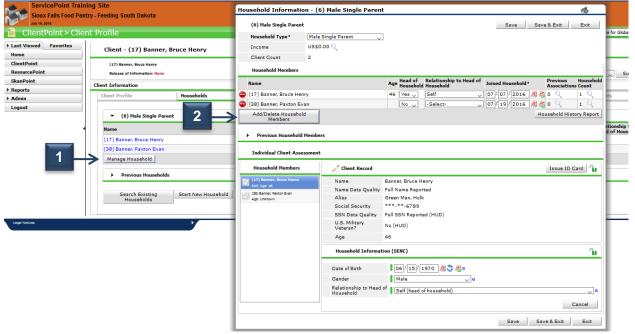
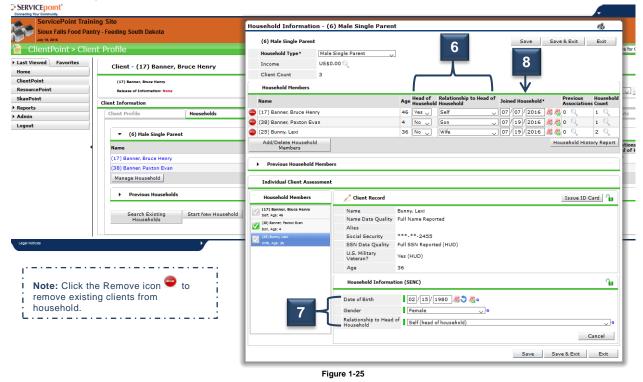


Figure 1-26

- 2. Click the drop down arrow next to Add Clients to the Household. (3) Search for an existing client. Follow Client Search-New & Existing Clients process on page 3. Click Search.
- 3. To select the client click the Add icon 💿 . (4) This will move the client to the Selected Clients area. (5) Click Continue to return to the Household Information screen. (See Figure 1-27)
 - a. If the client you are searching for does not appear in the Client Results follow Adding New Client process on page

	SERVICEpoint*			Add/Delete Household Members - (6) Male Single Parent
	ServicePoint Trai	ining Site Intry - Feeding South Dakota	Household Information -	Undef Debtership to Asian Devices Unreship
	ClientPoint > Clie		(6) Male Single Parent Household Type* Ma	Name Nge Household Head of Household Household Household Associations Count ig (17) Banner, Bruce Henry 46 Yes Self 07/07/2016 0 1 0 e for Global
	Last Viewed Favorites Home	Client - (17) Banner, Bruce Henry	Income US Client Count 2	USS
	ClientPoint ResourcePoint	(17) Banner, Bruce Henry Release of Information: None	Household Members	Previous Household Members This Household does not have any previous members. Sub
	SkanPoint Reports	Client Information	National	Add Clients to the Household
	➤ Admin Logout	Client Profile Households	- (1 3 (3 ton Evan	
		(6) Male Single Parent	Members	Please Search the System before adding a New Client. Hide Advanced Search Pret Mode Last sum. d of House
		(17) Banner, Bruce Henry (38) Banner, Paxton Evan	Previous Household Mem	Name Otta
		Manage Household	Individual Client Assessme	Name Quar -Select-
		 Previous Households 	(17) Banner, Bruce Henry Self, Age: 46	Social Security
		Search Existing Households Start New Household		Secal Security Number Data Quality
	Legal Notices	>		U.S. Millary -Select-
				Exact Article
				Search Clear Add New Client With This Information Add Anonymous Client
Firmer 4.07				Client Number Enter or Scan a Client ID to add that Client to this Household.
Figure 1-27				Client ID # Submit
				Client Results
			4 4	ID Name Number Date of Birth Allas Cender Banned Count ID 15 Bunny, Bugs ***-**-1116 06/06/1986 Male 0 Image: Count
				23 Bunny, Lexi ***-**-2455 02/15/1980 Female 1 1 Showing 1-2 of 2
				Selected Clients
			5	ID Name Social Security Date of Birth Alias Gender Banned Household Count
				Ro matches.
				Continue

- 4. The Household Information screen will appear. Set the Head of Household indicator. If this client is Head of Household, select Yes, otherwise select No. Select Relationship to Head of Household from the pick lists. If the client is the Head of Household, select Self. (6) Complete Date of Birth, Gender, and Relationship to Head of Household in the Household Information area. (7) Click Save & Exit to return to the Client Information screen.
- 5. The Joined Household defaults to the current date. (8) This is the date the client will be entered into the household. It is a required field.
- 6. Click **Save** and Click **Exit**. The user will be returned to the **Household Overview** screen. The newly added household will display. (See Figure 1-25)



An existing client is now part of an existing household

Removing Existing Client From Household

**These steps below will remove a Client from the Household you will no longer be able to associate them with Household information including Goals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date. **

- 1. To remove client from an existing household. Click **Manage Household** on the Household Overview screen. (1) The Household Information popul box will appear. Click the **Remove icon** enext to the client you would to remove. (2)
- 2. Client Left Household popup box will appear. (See Figure 1-26) Date Client Left Household will default to the current date. Click Save. (3)
- 3. The removed client will now appear in the Previous Household Members area in the Add/Delete Household Members section.

SERVICEpoint		
ionnecting Your Community.	Household Information - (6) Male Single Parent 🤞	-
ServicePoint Training Site Helpline Center - 2-1-1 July 21, 2018 ClientPoint > Client Profile	ig (6) Male Single Parent Save Save & Exit Exit Household Type* Male Single Parent	Т
Last Viewed Favorites Home ClientPoint ResourcePoint ClientPoint C	Household Members	
ResourcePoint Release of Information		nother Household Men
SkanPoint Client 2	(17) Banner, Bruce Henry 46 Yes √ Self √07/07/12016 36 0 1 ○ B) Banner, Paxton Evan 4 No √ Son √√07/19/12016 36 0 1 ○	Asse
Admin	Add/Delete Household Client Left Household I Household I Household History Report	
Logout (6) Male Si Name	gle Par Previous Household Members By removing this Client from the Household you will no longer be able to saccare them with household information including Gals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date.	Age Head of Househol
(17) Banner, Bruce (38) Banner, Paxto	Henry Individual Client Assessment Please select the date the Client left the Household.	46 Yes 4 No
Manage Househo	Date Client Left Household* 07/21/2016 # 8	
Previous Ho	useholds 3 Save Cancel	<u> </u>
Search Exis Household	ing Social Security 123-45-6789	
	U.S. Military Veteran ² No (HUD)	
Legal Notices	Age 46	
	Household Information (SENC)	
	Date of Birth 06/15/1970 🕂 🖏 a	
	Gender [Male √] ⊂ Relationship to Head of Househol [Self (head of household) √] ⊂	
	Cancel	
	Save Save & Exit Exit	

Figure 1-26

** These steps below will delete this Client's Association with the Household COMPLETELY.

If client was added to household in <u>error</u>. Click Add/Delete Household Members. In the Previous Household Members area - click the trash icon area - click the trash icon area - click the trash icon area. (4) This will delete the client's relationship to that household. Delete Household Relationship popup box will appear. (See Figure 1-27) Click Delete.(5)

	Epoint"			
	Community.		Household Information - (6) Male Single Parent 🚳	
		ining Site Intry - Feeding South Dakota	(6) Male Single Parent Save Save & Exit Exit Household Type* Male Single Parent	
	uty 18, 2018			
	entPoint > Clie	ent Profile		al Se
	red Favorites	Client - (17) Banner, Bruce Henry	Client Count 2 Household Hembers	
	nt	(17) Banner, Bruce Henry	Name Age Head of Relationship to Head of Joined Household * Previous Household Associations Count	
	Point	Release of Information: None		ubm
	t	Client Information	C (17) Banner, Bruce Henry 46 Yes Self 07/07/2016 0 0 1 1 C (07/07/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 1 1 (07/107/2016 0 0 0 0 1 1 (07/107/2016 0 0 0 0 1 1 (07/107/2016 0 0 0 0 1 1 (07/107/2016 0 0 0 0 1 1 (07/107/2016 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 0 1 1 (07/107/2016 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
		Client Profile Households	3(38) Banner, Paxton Evan 4 No [Son [07]/[19]/[2016 38 80 0] 1] Add/Deter Household History Report Household History Report	_
		✓ (6) Male Single Parent	Previous Household Members Add/Delete Household Members - (6) Male Single Parent	to
		(17) Banner, Bruce Henry	Individual Client Assessment	seho
		(38) Banner, Paxton Evan	Name Age Household Head of Household Household Associations Count	
Figure 4 07		(25) Bunny, Lexi	17) Banner, Bruce Henry Delete Household Relationship	۰.
Figure 1-27		Manage Household	Vou are about to delete the Household Relationship for:	
		Previous Households	(38) Banner, Ration Bian Alli (25) Bunny, Lexi (Joined Household: 07/19/2016)	
			Sot Previous Household Members This will delege this Clung's association with the Household Completely. to delete this association?	E.
		Search Existing Start New Househo	Id U.S Name Age to Delete Cancel nt	
		Households	U.3 va va (25) Bunny, Lexi 36 n	
			Ag	
	•		Ho	Г
			Add Clients to the Household	
			Date Continue Cancel	
			Gens	
			Rela Hous	
			Cancel	۶.
			Save Save & Exit Exit	

Adding a Release of Information (ROI)

Each Adult Client MUST sign an ROI

- Search for and select a client in *ClientPoint*. (See page 3) or click <u>Client Search- New & Existing Clients</u>. Click the **ROI** tab to display the **Release of Information** area. (1) Click the **Add Release of Information**. (2) The Release of Information popup box will appear.
- 2. Household Member Section: Each adult (18+) household member must sign a separate ROI. Each ROI must be attached to an individual household member; this will require you to scan and attach the signed ROI in each Client Profile.
 - a. For minor household members (17 years of age and younger) DO NOT check the box(s).
- In the Release of Information Data area Provider* will default to the current provider. Complete Release Granted. The Start Date will default to current date. Complete End Date <u>always enter</u>: 01/01/2099. (4) Select from the Documentation picklist. (5) Click Save Release of Information to return to Client Information screen. (See Figure 1-28)

📔 ClientPoint > Client	t Profile			Type here for Global S	earch 💰 🕕 🛨 🕜
Last Viewed Home	Client - (17) Banner, Bruce Henry	1			Mass Visibility Update
ClientPoint	🗑 (17) Banner, Bruce Henry		Release of Informat	ion 🛛	
ResourcePoint	Release of Information: None			rmation - (17) Banner, Bruce Henry	ier Household Member- 🗸 Submit
ShelterPoint	Client Information	V	Release of Info	rmation - (17) Banner, Bruce Henry	
SkanPoint	Client Profile Households	ROI	Household Memi	bers	i Summary
Reports	chent rione nouscilous	NOT C			Summary
▶ Admin Logout	Release of Information		To include Hou box beside ead	isehold members for this Release of Information, click the ch name. Only members from the SAME Household may be selected.	
2	Provider		🗖 🗌 (6) Male Single I	Parent	End Date
	Add Release of Information	3	(17) Banner, Bru	uce Henry	
			(38) Banner, Pa	xton Evan	
			(25) Bunny, Lex	i (Left Household: 07/19/2016)	Exit
Legal Notices	· · · · · · · · · · · · · · · · · · ·		Release of Infor	mation Data	
			Provider*	Sioux Falls Food Pantry - Feeding South Dakota (10) Search My Provider Clear	
			Release Granted*		
			Start Date*	07 / 2016 🔊 🖏	
		4	End Date*	01 / 01 / 2099 🙇 🎝	
			Documentation	-Select-	
		5	Witness	none Other Signed Statement from Client Verbal Consent (211 Helpline Only) Verification from Other Institution of Information Cancel	
			Figure 1-28		

Click the Trash icon to remove the Release of Information from the client. Click the Edit icon to alter the Release of Information. (6) Click Add Release of Information to add a new Release of Information. (7) Click the file attachment icon to add an attachment to the ROI. (8) This will open the File Attachment window. (See Figure 1-29)

Notice: The file attachment icon updates to show how many attachments are associated with each ROI.

📔 ClientPoint > Clier	nt Pro	file							Type here for Global Search	🥌 🐌 ★ 🖉
Last Viewed Favorites Home	C	Client - (1	17) Banner, Bri	ice Henry						ſu
ClientPoint		(17) Banner,	Bruce Henry							
ResourcePoint		Release of Ir	nformation: Ends 01/01	2099				-Switch to Another Househ	old Member- 🧹 Submit	
SkanPoint Reports	Clie		on				Service Transactions			
Admin		6		Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary
Logout						_				
		Release	e of Information							
		Pi	rovider				Permission	Start Date	End Date	
7		🧷 🧋 G	ieneral - The Comm	unity Outreach			Yes	07/21/2016	01/01/2099	$8 \rightarrow \bigcirc$
	>	Add Releas	se of Information				Showing	1-1 of 1		
										Exit
1										