Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 1

Client Search ~ Common Intake ~ Client Households ~ ROI

Icon Overview

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

	SerivcePoint Icon	SENC Partner Agency
	Lock Icon	Agency Shared Information
	UnLock Icon	Globally Shared Information
	Edit Icon	Update / Change Current Information
	Delete Icon	Remove enteries made in error- ONLY
	View Detail Icon	View Attachements
	Select Icon	Add Selected Information
	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
	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

< 91- 30 Days >

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 Client ID 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 eneter client profile. (See Figure 1-4)

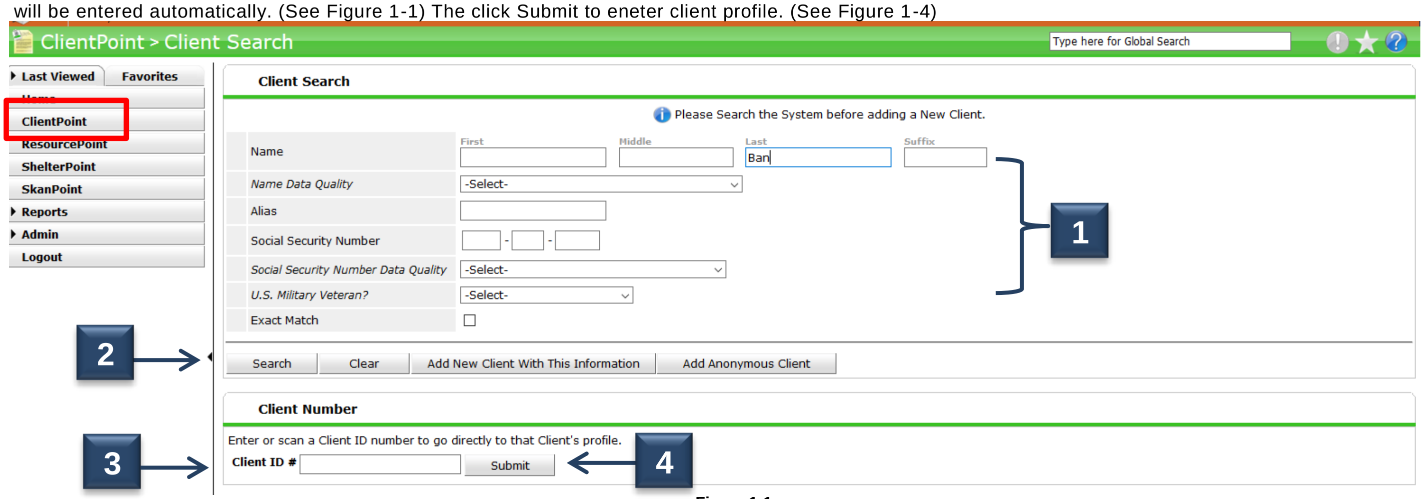


Figure 1-1

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

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.

3. Click **Search** to return a list of possible matches. **(2)** The screen will refresh to show a possible list of matches. (See Figure 1-2)
4. If there is a match, you can type the **Client ID #** directly into the text field, **(3)** —and click **Submit. (4)** To open **Client Profile** screen or click on the **Pencil** icon next to the name to open prefix. Go **Common Intake** on page 5. (See Figure 1-7)

Figure 1-2

Client Results

		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		12	Monster, Cookie	***-**-1113	03/03/1987		Male		0
		13	Rabbit, Roger	***-**-1114	04/04/1986		Male		0
		3	test, Baby		01/02/2010		Male		1
		2	test, Just A	***-**-8888	01/01/1976		Transgender		1
		10	Trainer, Sioux	***-**-1111	01/01/1988		Female		0
		11	Tree, Peach	***-**-1112	02/02/1988		Female	Indefinite	1
		16	Tree, Plum		01/01/2001		Male		1

Showing 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 next 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)** Enter as much additional information as you have available. **(2) 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.*

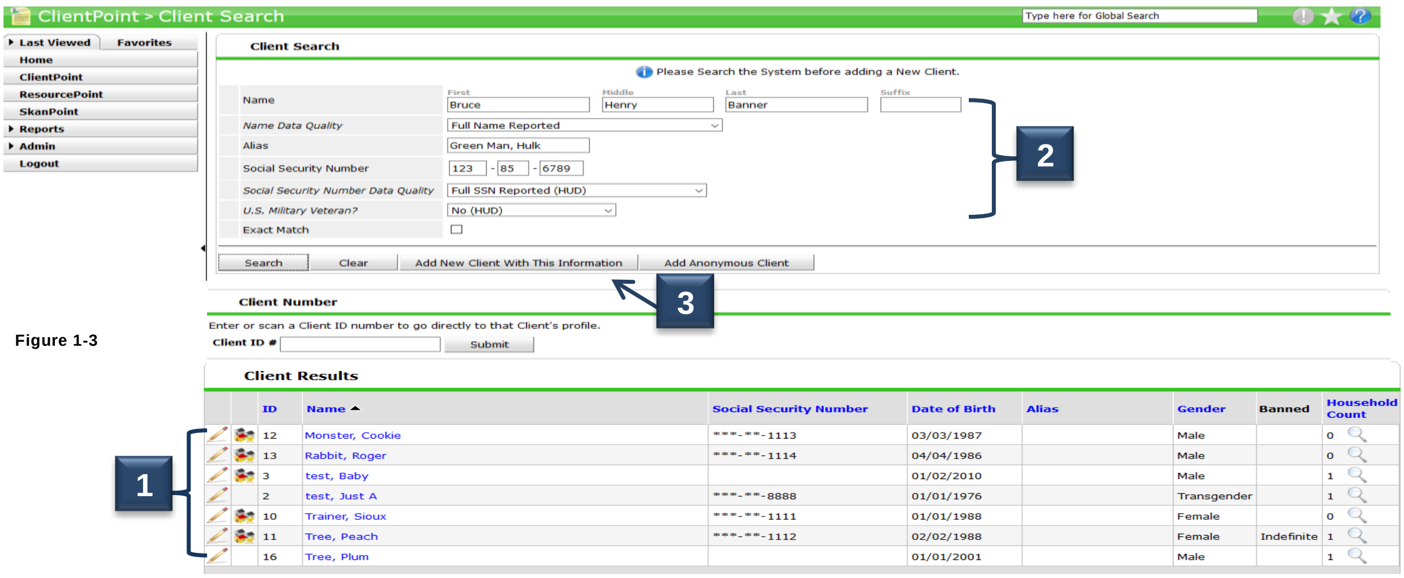


Figure 1-3

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

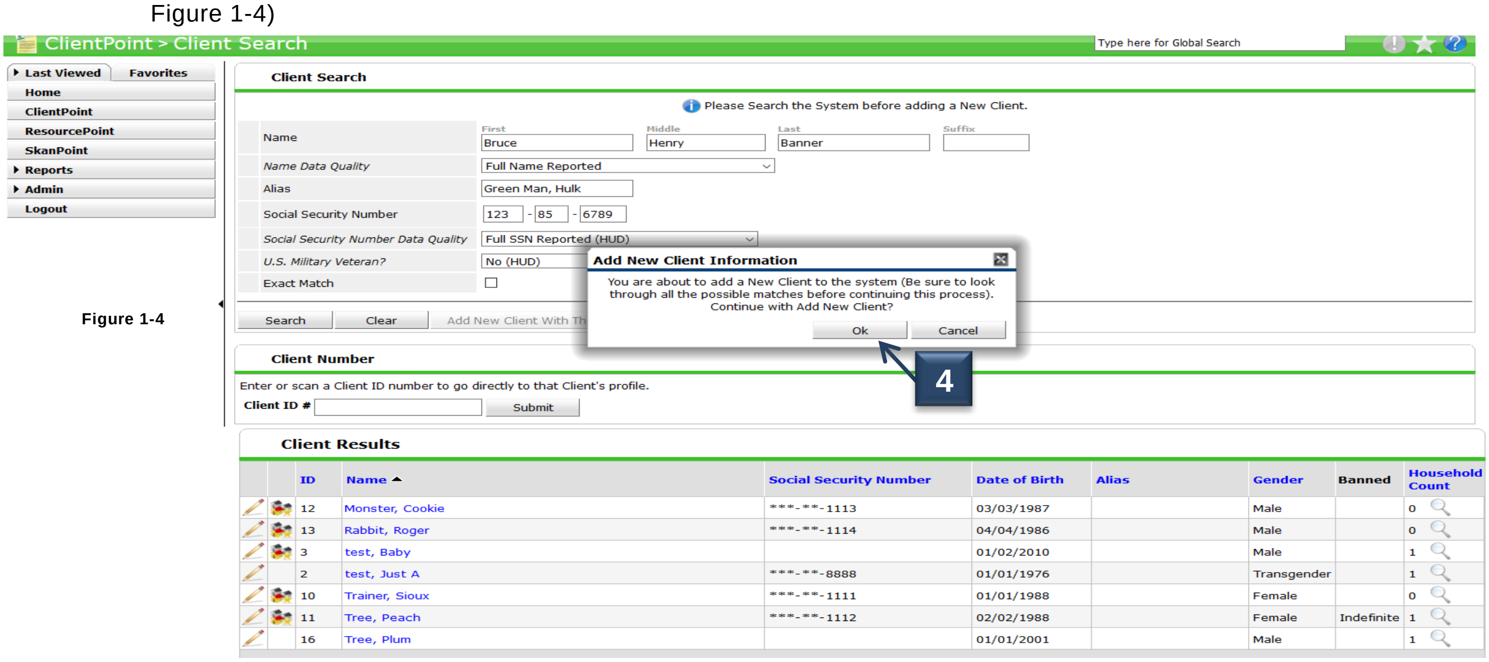


Figure 1-4

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)**

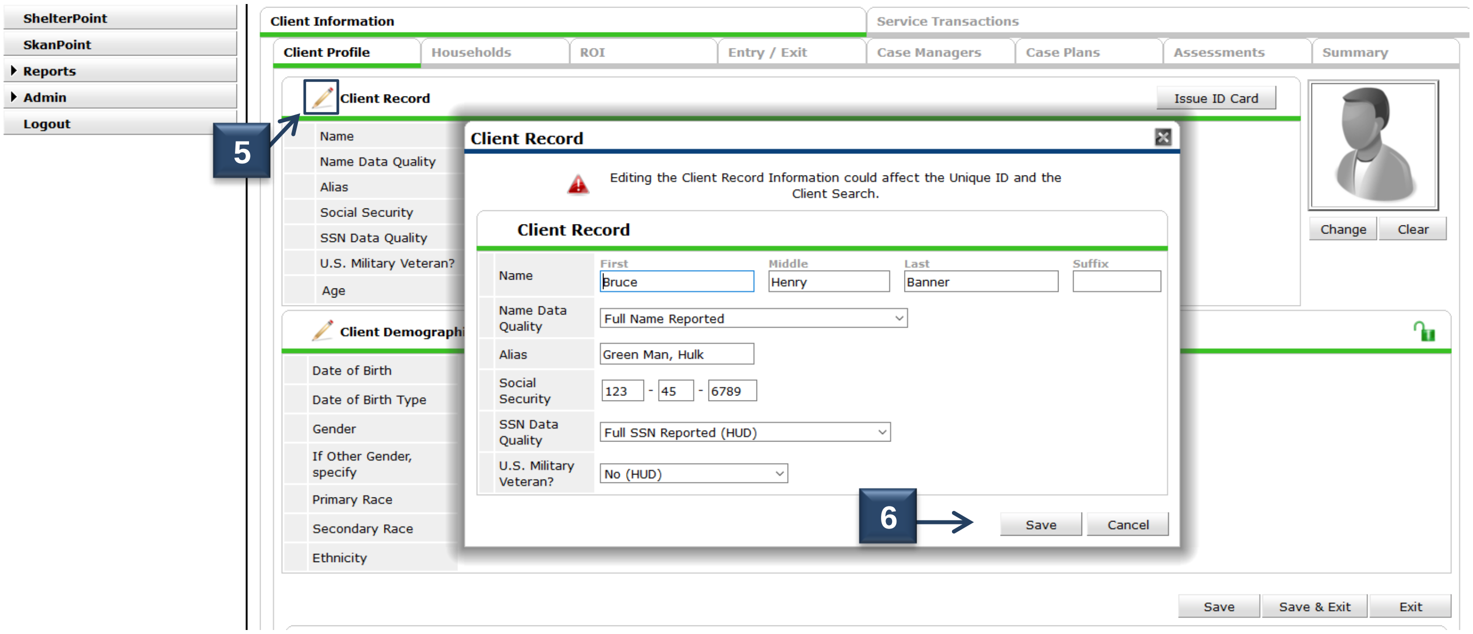


Figure 1-5

5. Click the **Edit** icon next 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 many fields as possible for data quality.*

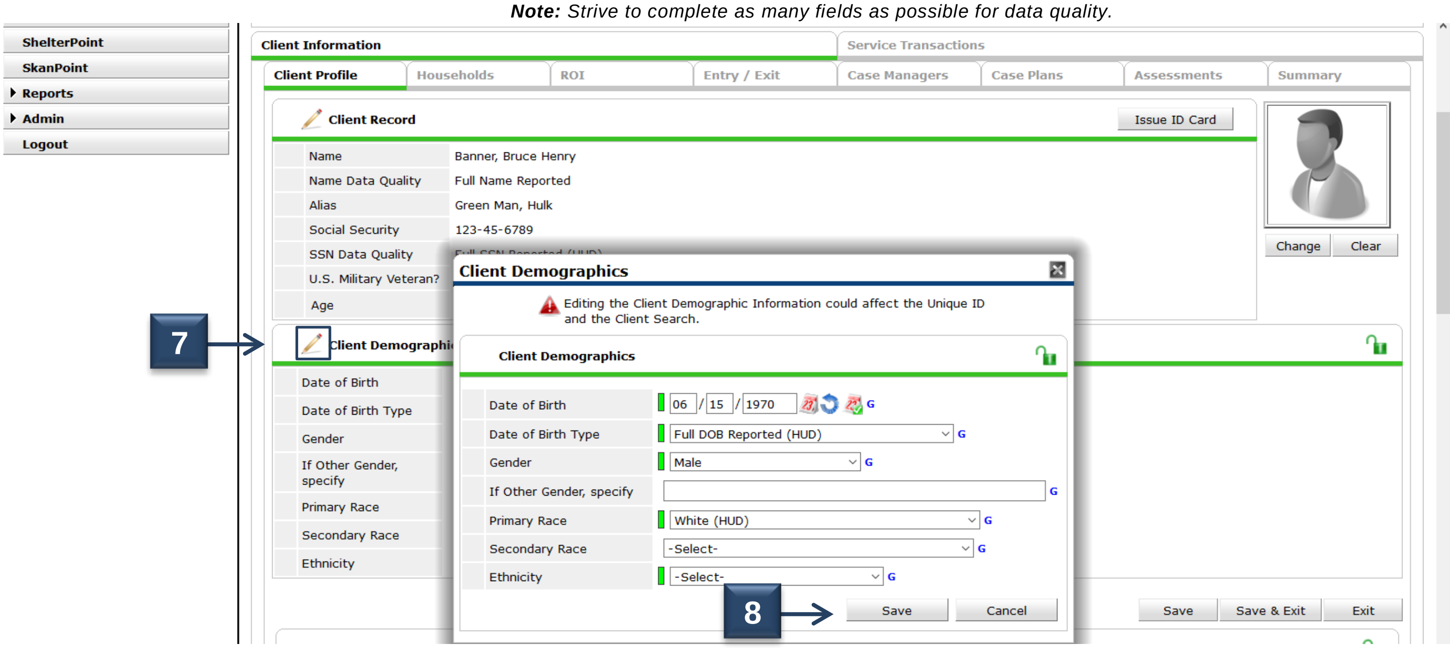


Figure 1-6

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)

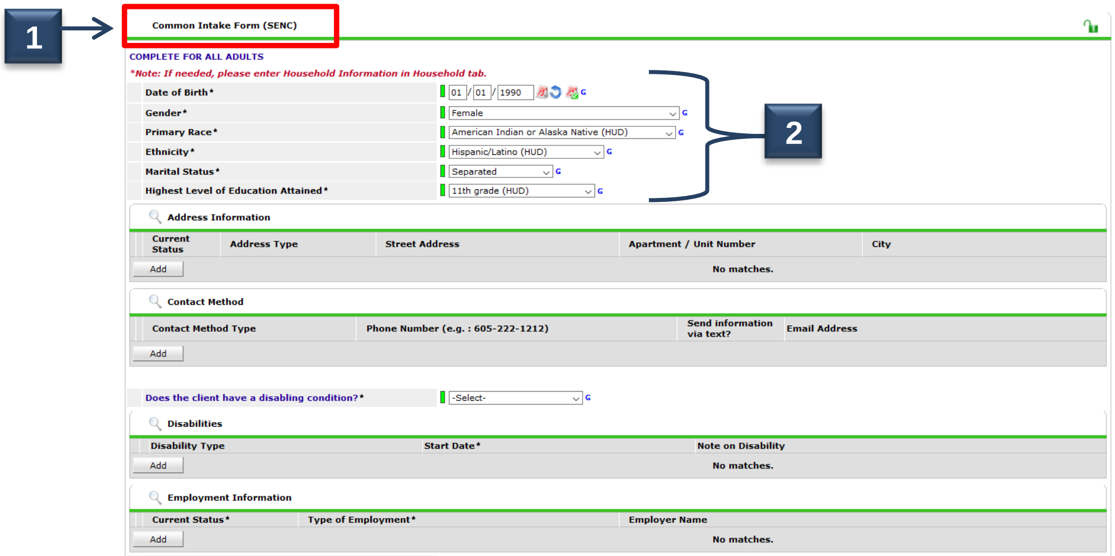


Figure 1-7

Address Information

Adding Client's Residence/ Last Permanent Address

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.*

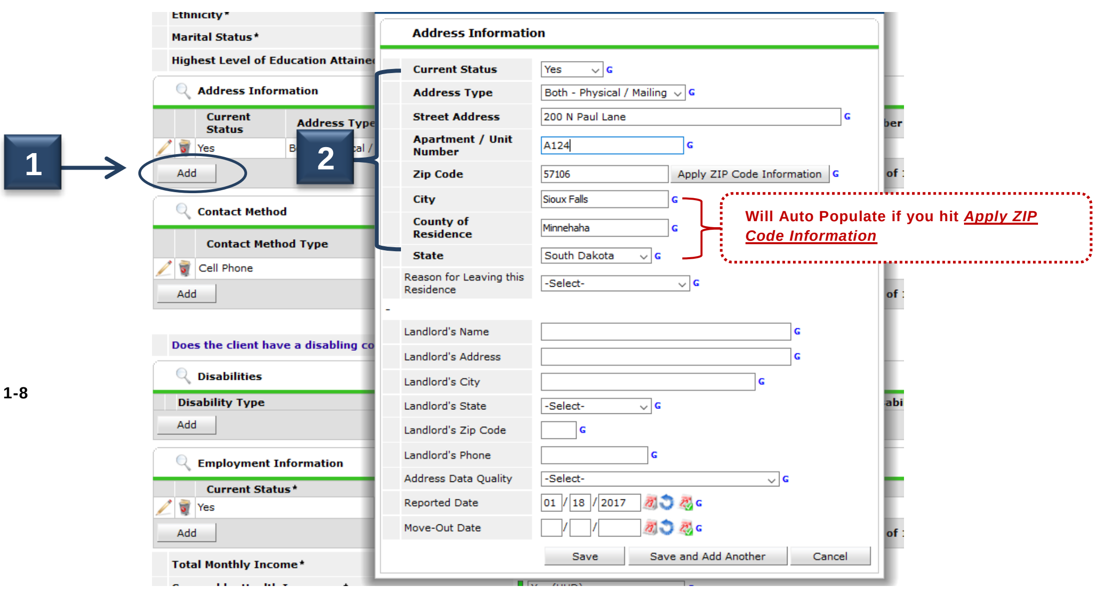


Figure 1-8

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.

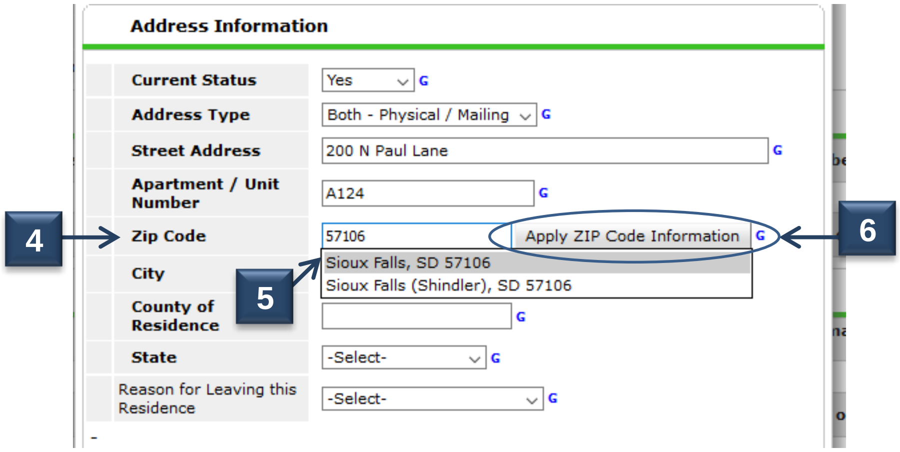


Figure 1-9

2. 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)

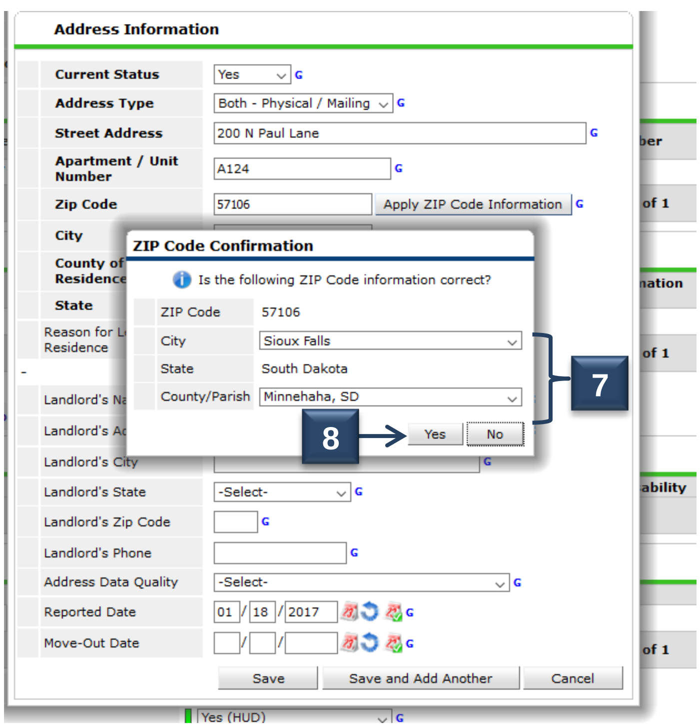


Figure 1-10

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 Client's Residence / Last Permanent Address

****<u>ADDRESSES ARE NEVER DELETED, EDIT AND ADD ANOTHER</u>****

1. Click the **Edit** icon next to the address that is no longer current. **(1)** Use picklist- Change *Current Status* – **No. (2)** Use picklist- *Reason for Leaving this Residence*- select from one of the options. **(3)** Enter Move-Out date. **(4)** (See Figure 1-11)

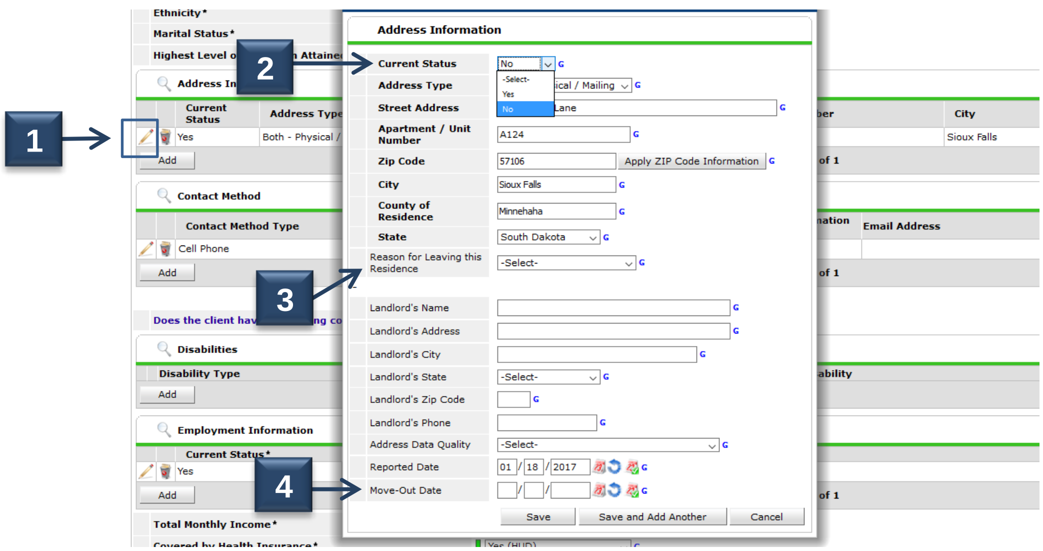


Figure 1-11

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

Adding Contact Method

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)**

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

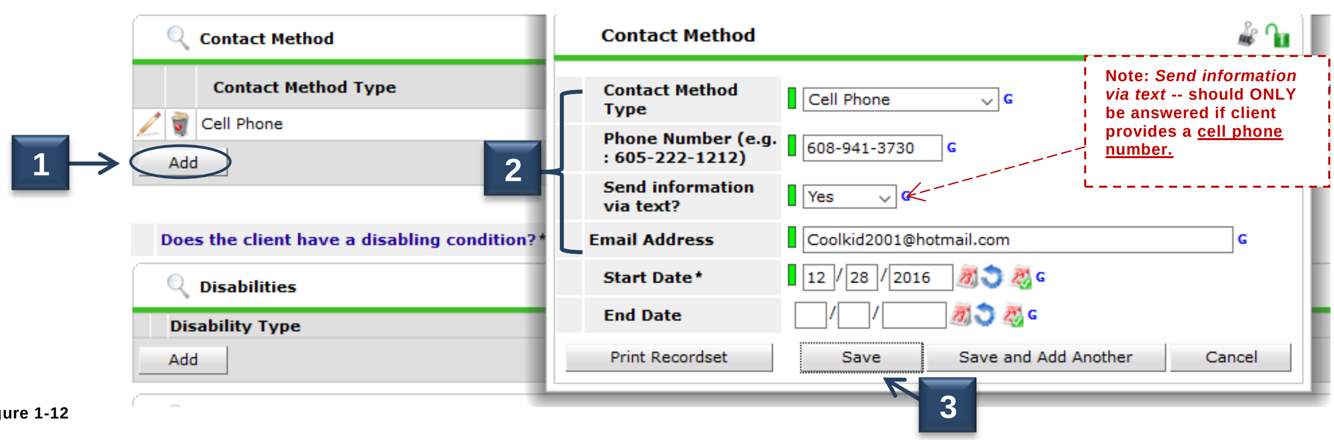


Figure 1-12

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

Changing Client Contact Method

****<u>CONTACTS ARE NEVER DELETED, EDIT AND ADD ANOTHER</u>****

1. Click the **Edit** icon next 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)**

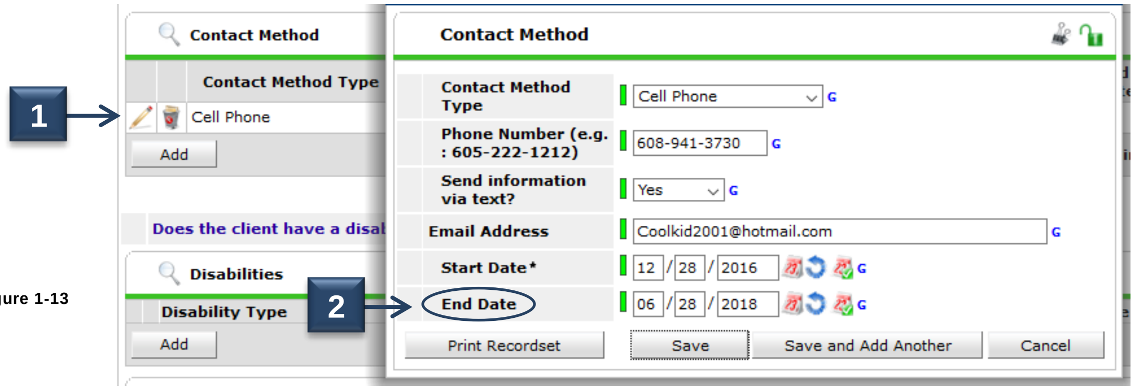


Figure 1-13

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

Disabilities

1. 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.**

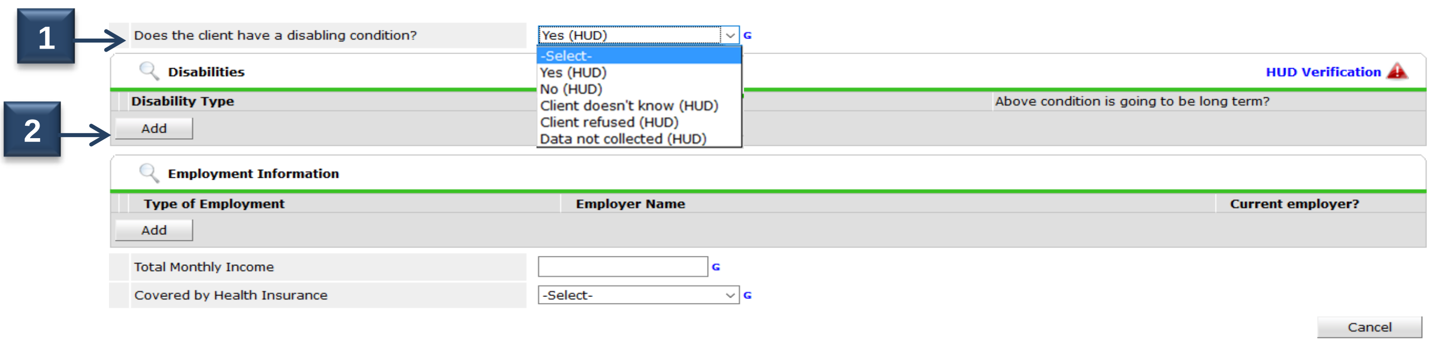


Figure 1-14

2. 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 Non-Bold sections *if information is available.* **(4)**

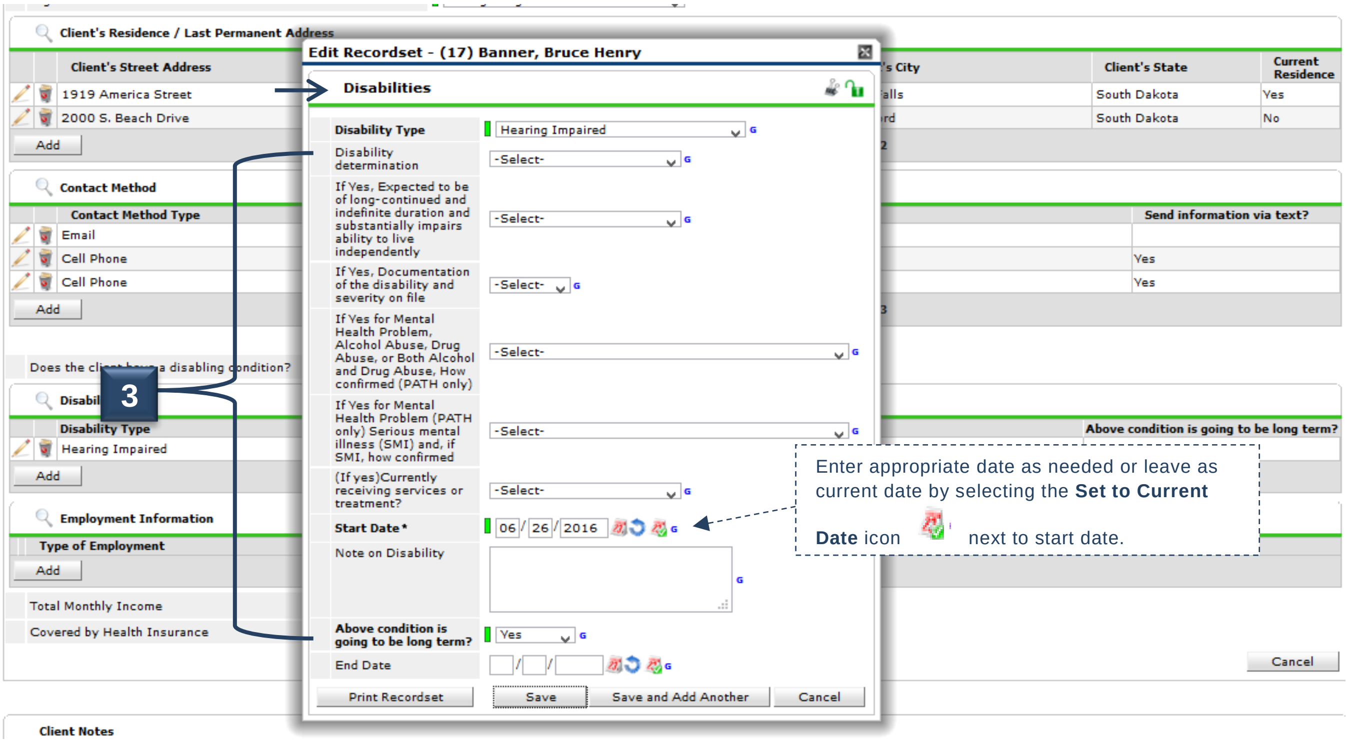


Figure 1-15

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

Employment Information

1. Click **Add** in the **Employment Information** section. **(1)** A popup box will appear on the screen. (See Figure 1-16) Complete all questions. (**2)**

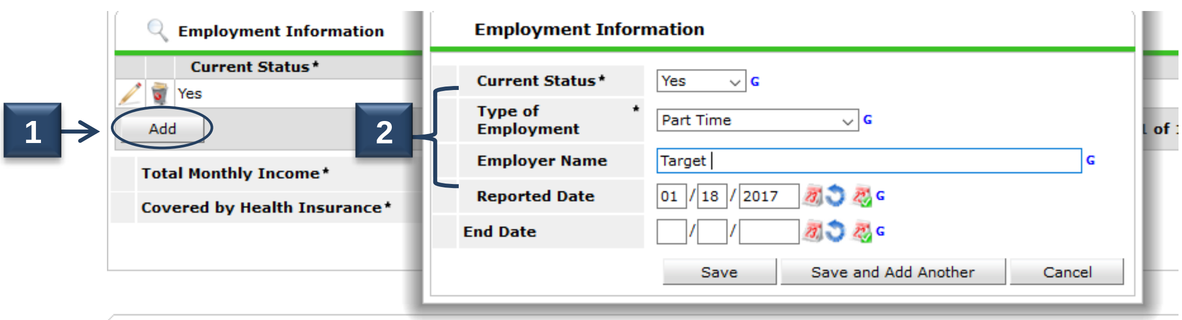


Figure 1-16

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

Changing Employment Information

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

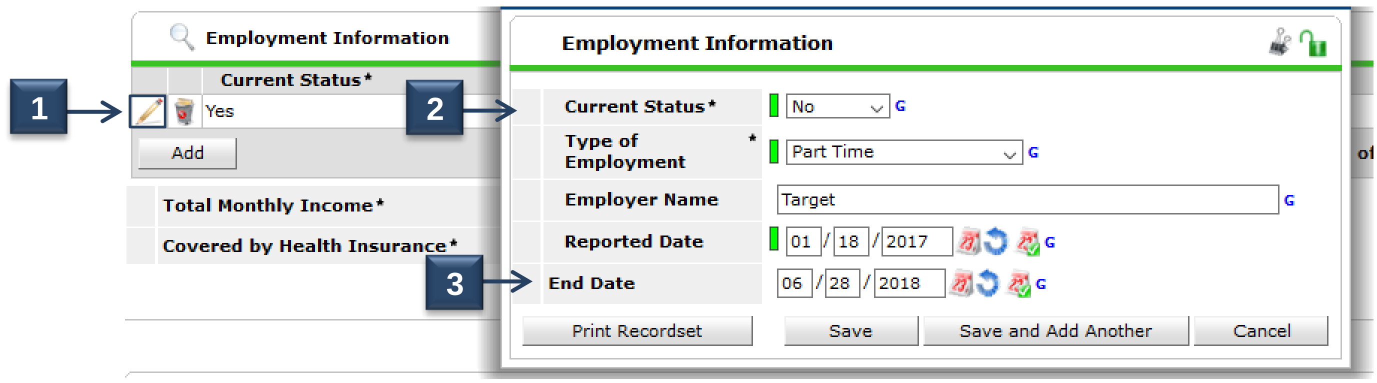


Figure 1-17

2. Click **Save** or **Save and Add Another** to add new Employment information. Click **Cancel** to return to the previous screen without retaining the changes.
3. Complete *Total Monthly Income* and *Covered by Health Insurance* questions. **(4)** (See Figure 1-18)

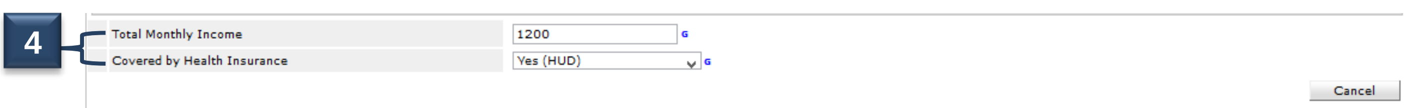


Figure 1-18

Client Notes **<u>Do not delete Client Notes always enter NEW Client Note</u>**

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>**

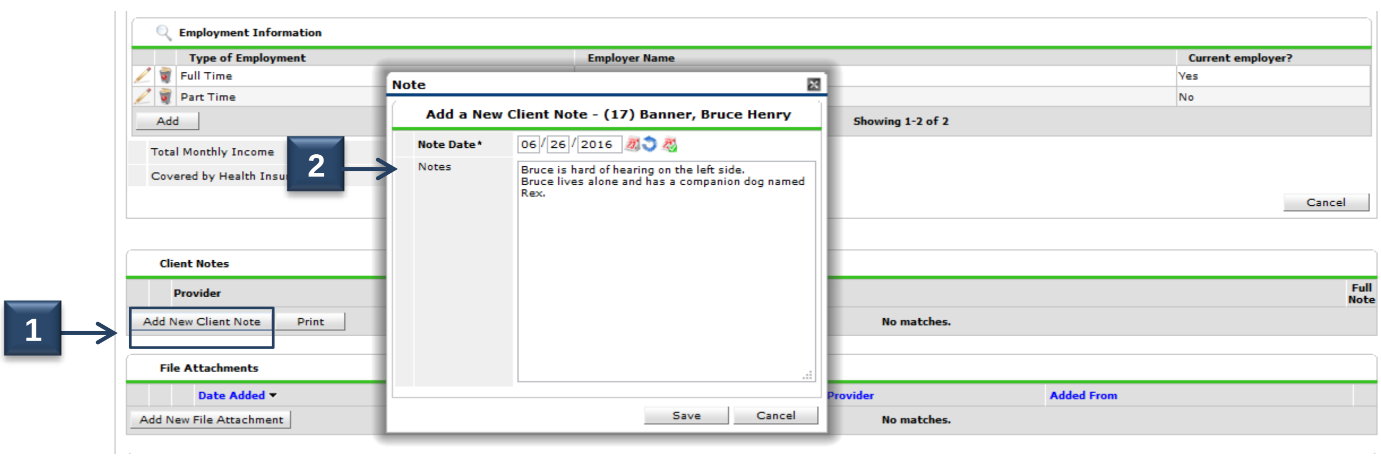
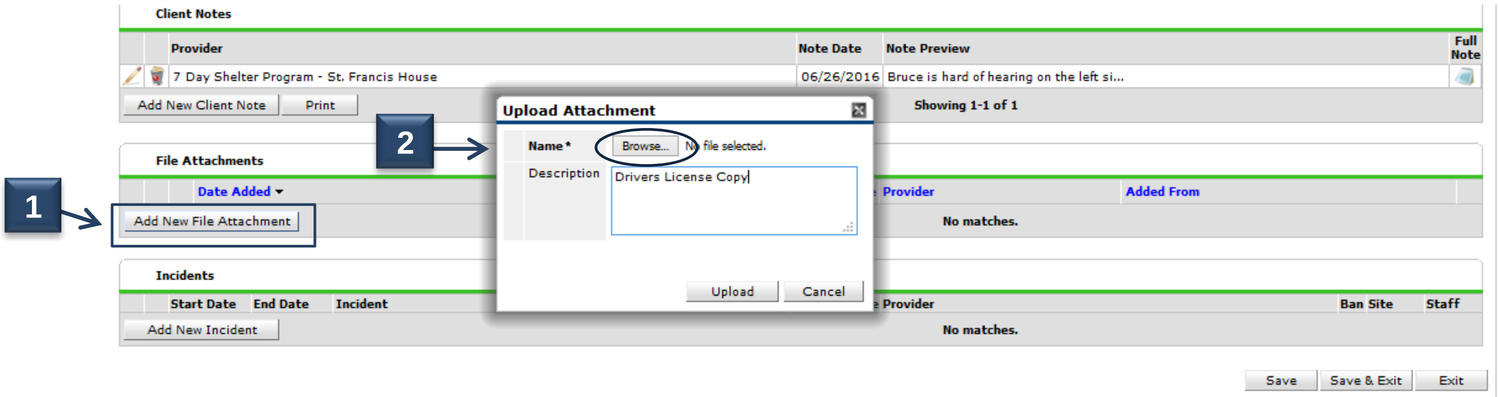


Figure 1-19

File Attachments **<u>Do not delete File Attachments always enter a NEW file attachment</u>**

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.

3. 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**. **<u>File Attachments are shared Globally.</u>**



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

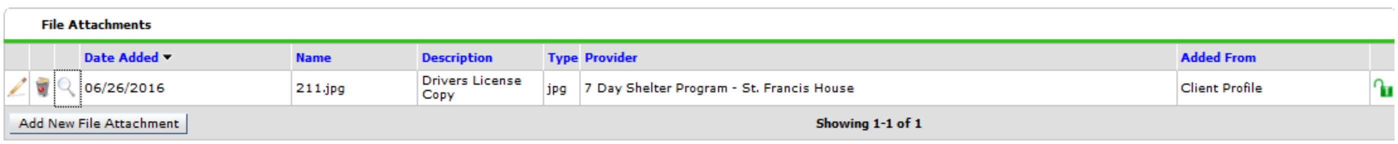


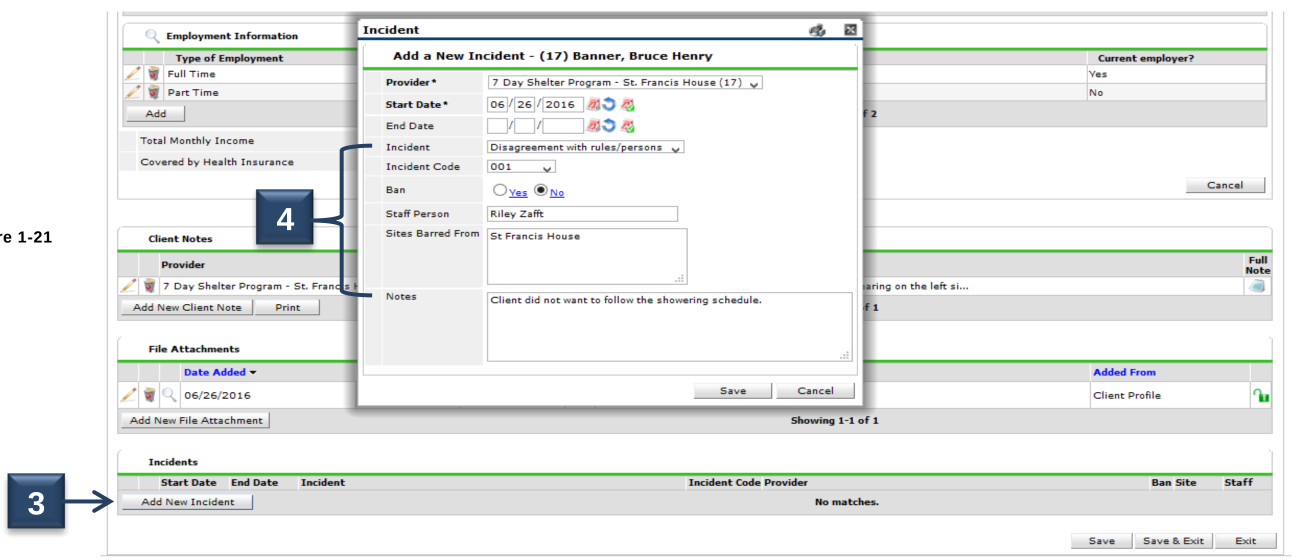
Figure 1-20

2. Once the file has been uploaded to the File Attachments section you can see the attachment by clicking the **View** icon
3. Click the **Edit** icon to edit the description if necessary.

Incidents

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>**

Figure 1-21



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 – Search Existing Households or Start New Household.
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.

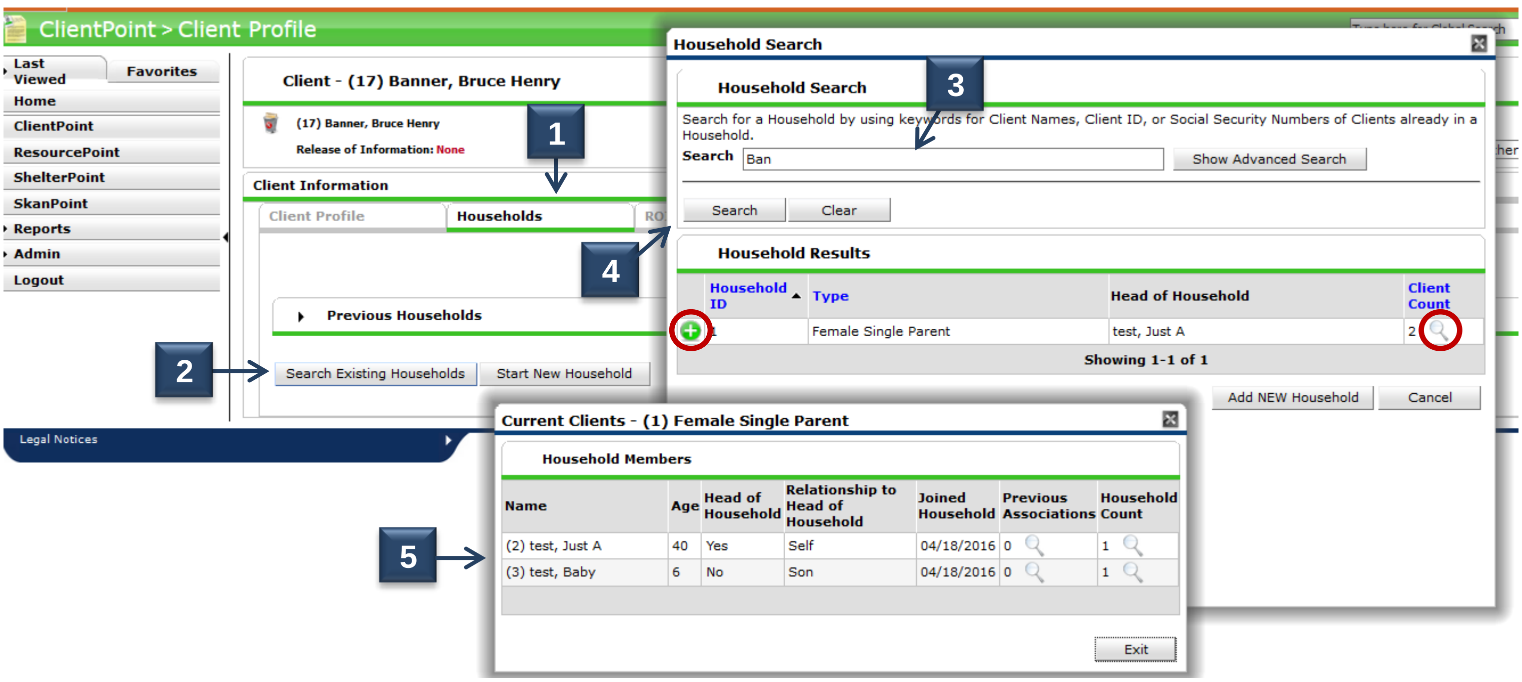


Figure 1-22

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 to view the clients in that specific household **(5)** Click **Exit** to return to 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:

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

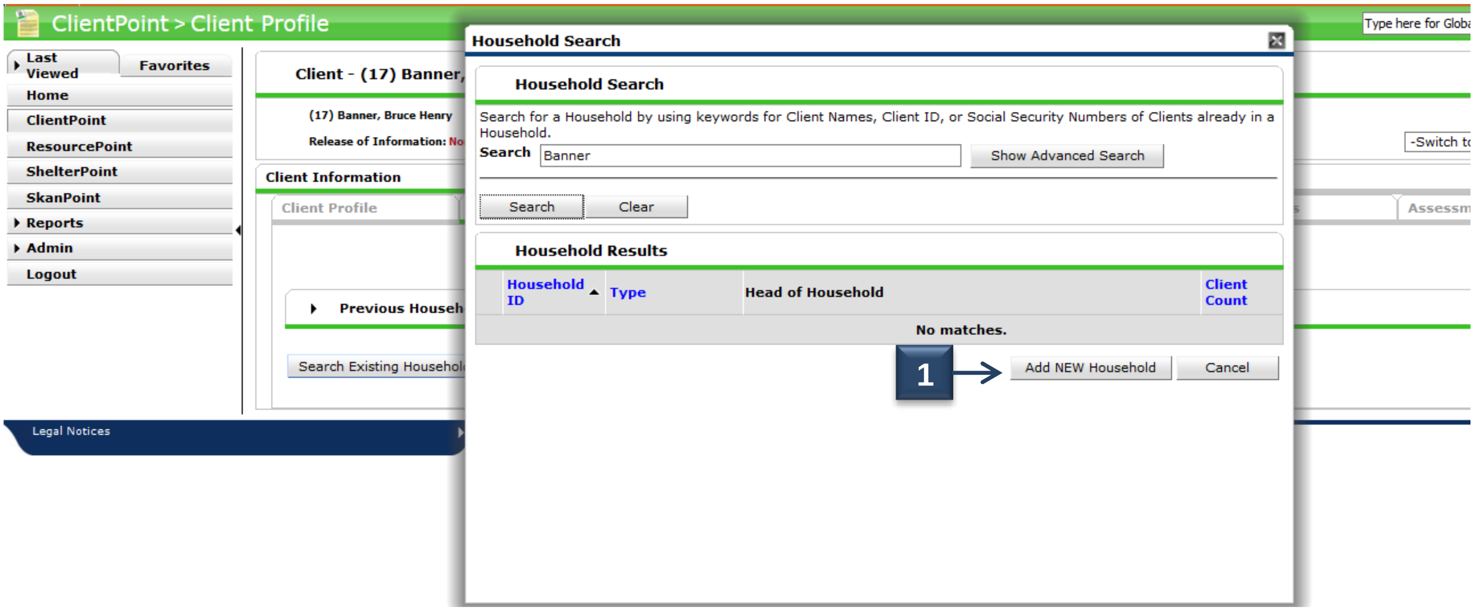


Figure 1-23

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)

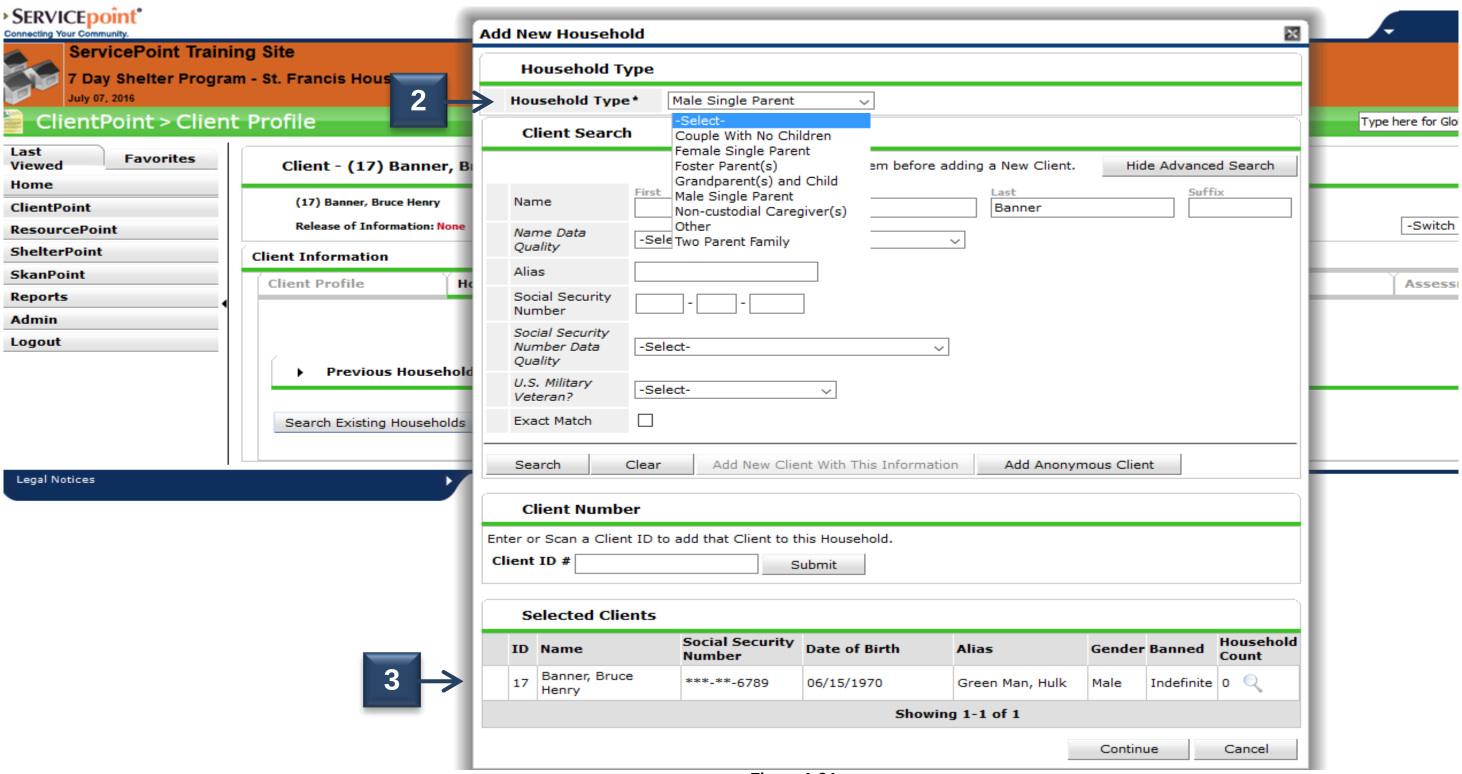


Figure 1-24

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.

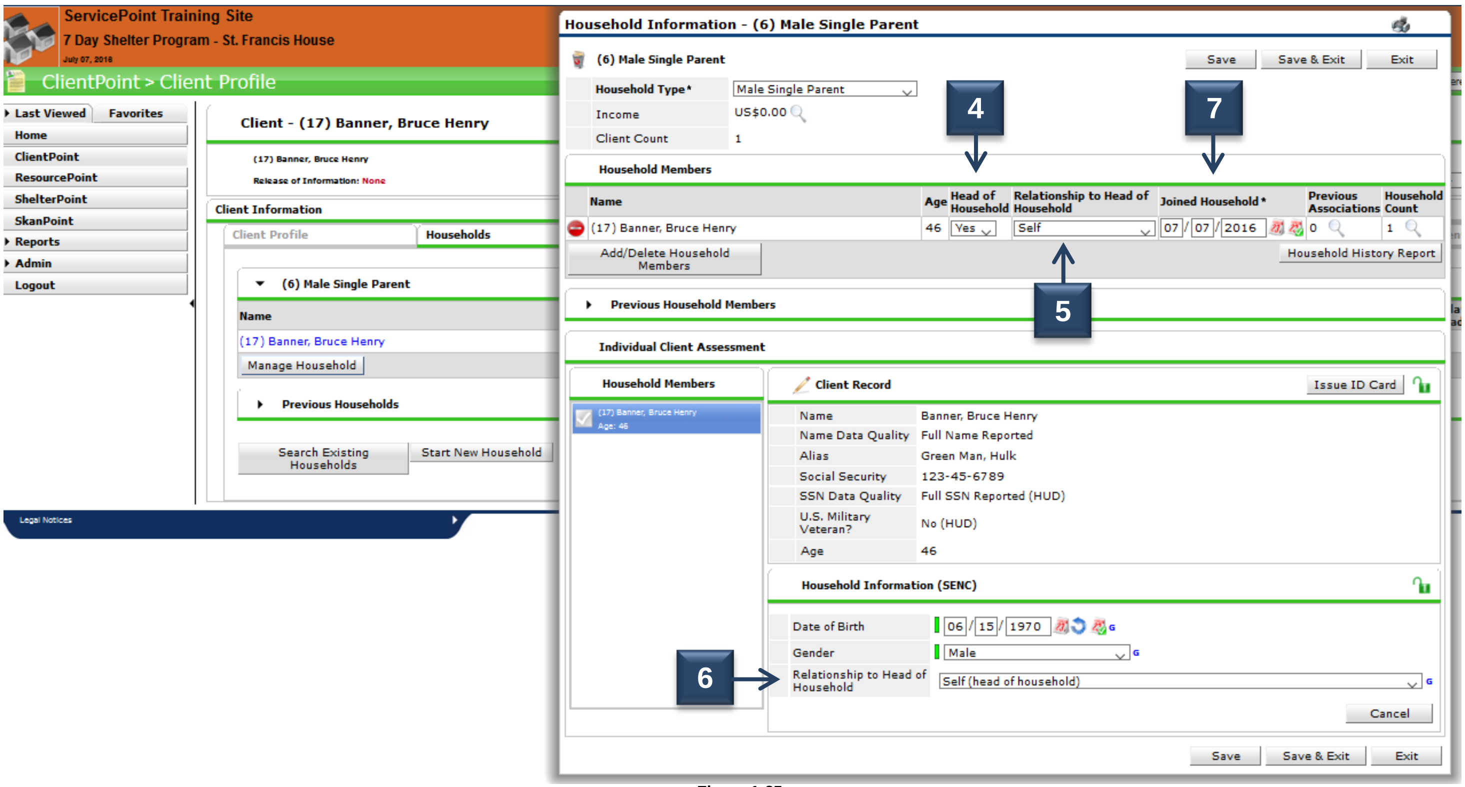


Figure 1-25

Add 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)

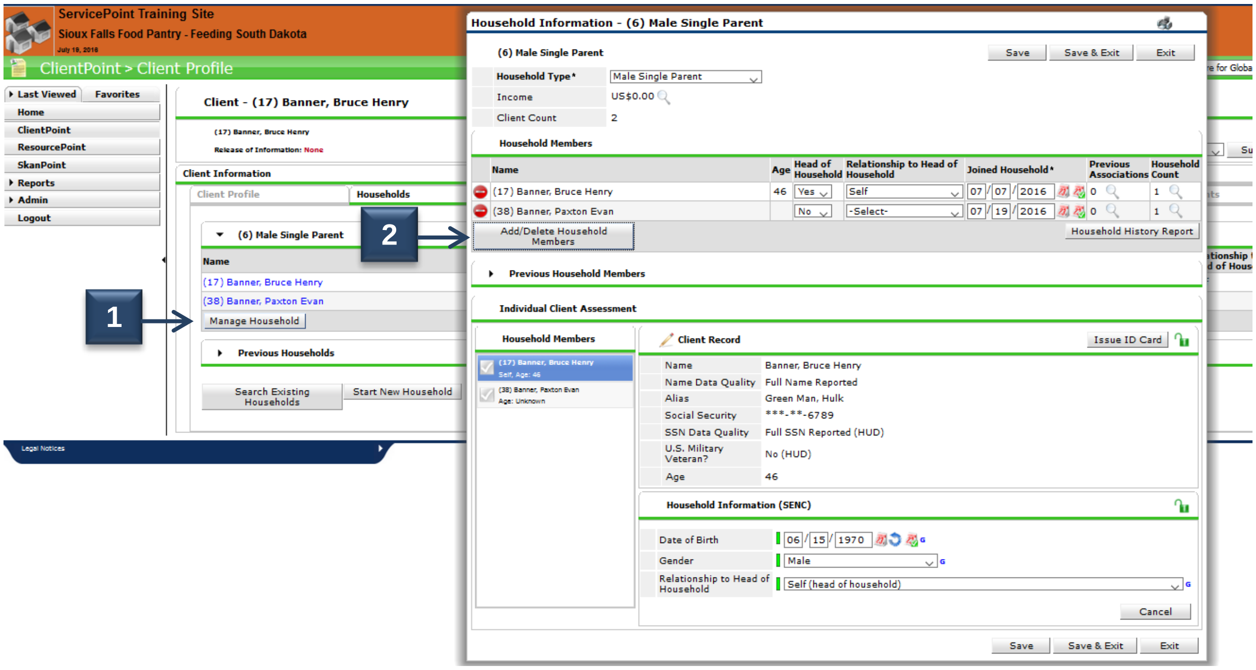


Figure 1-26

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 <u>does not</u> appear in the *Client Results* – follow **Adding New Client** process on page

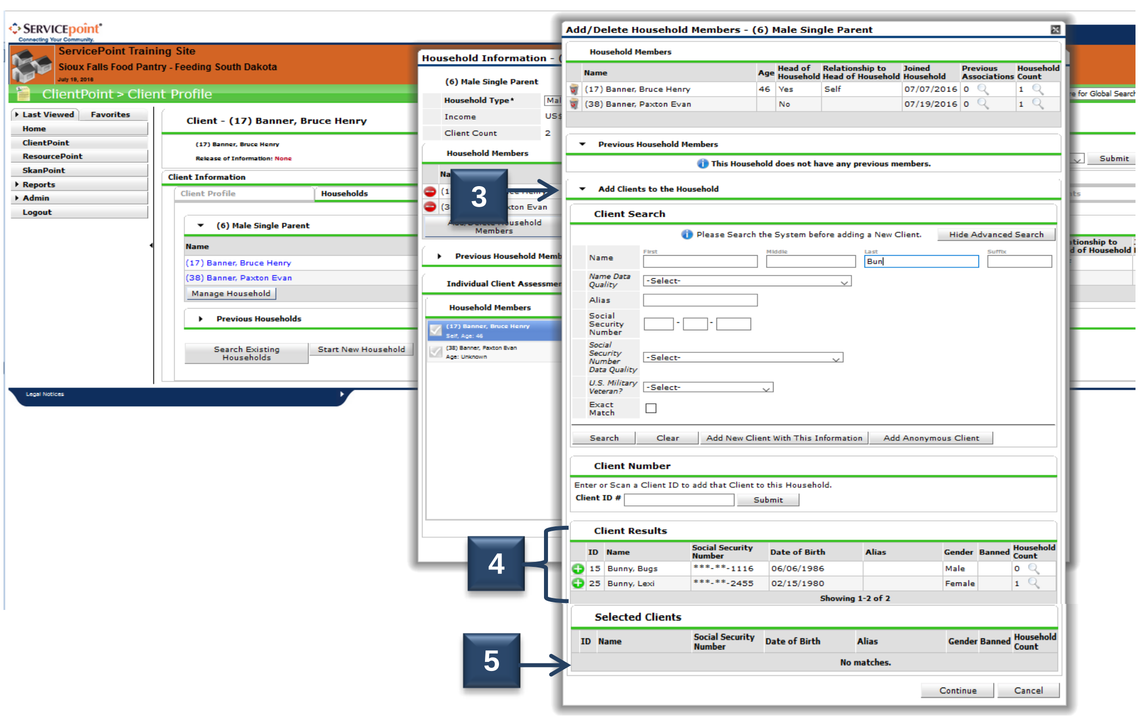
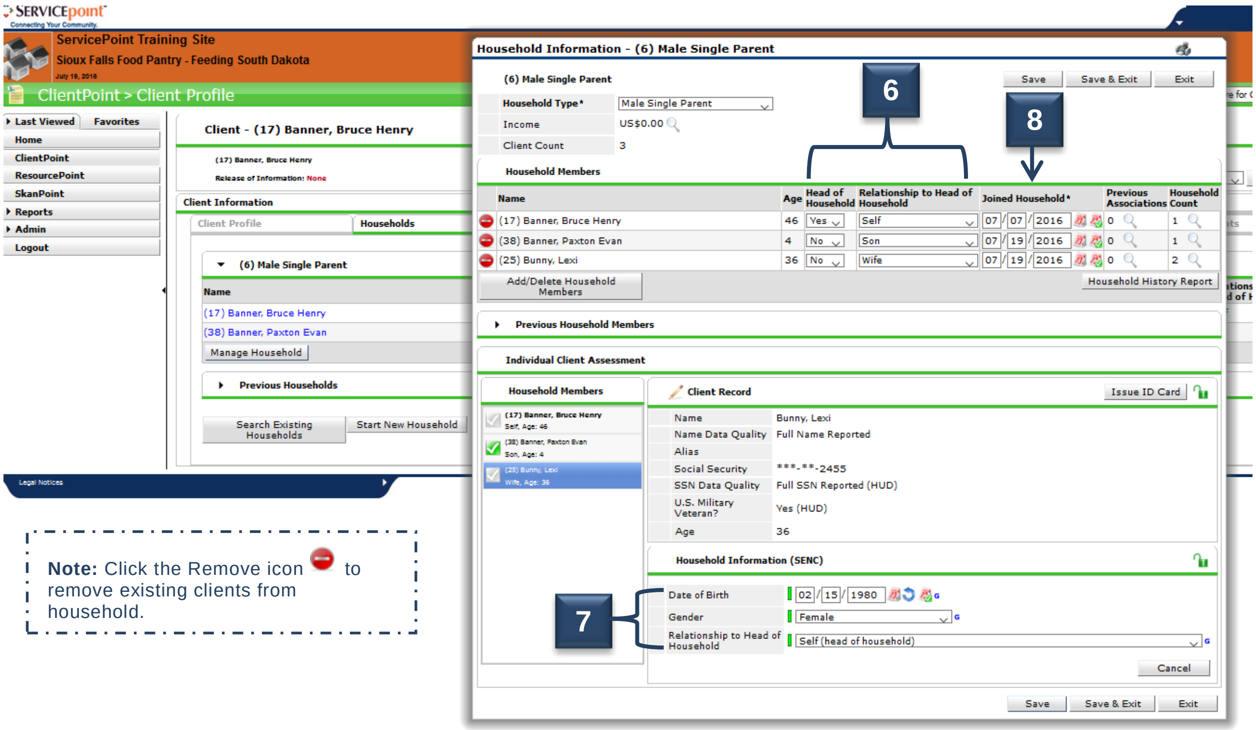


Figure 1-27

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)



Note: Click the Remove icon to remove existing clients from household.

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 popup box will appear. Click the **Remove icon** next 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.

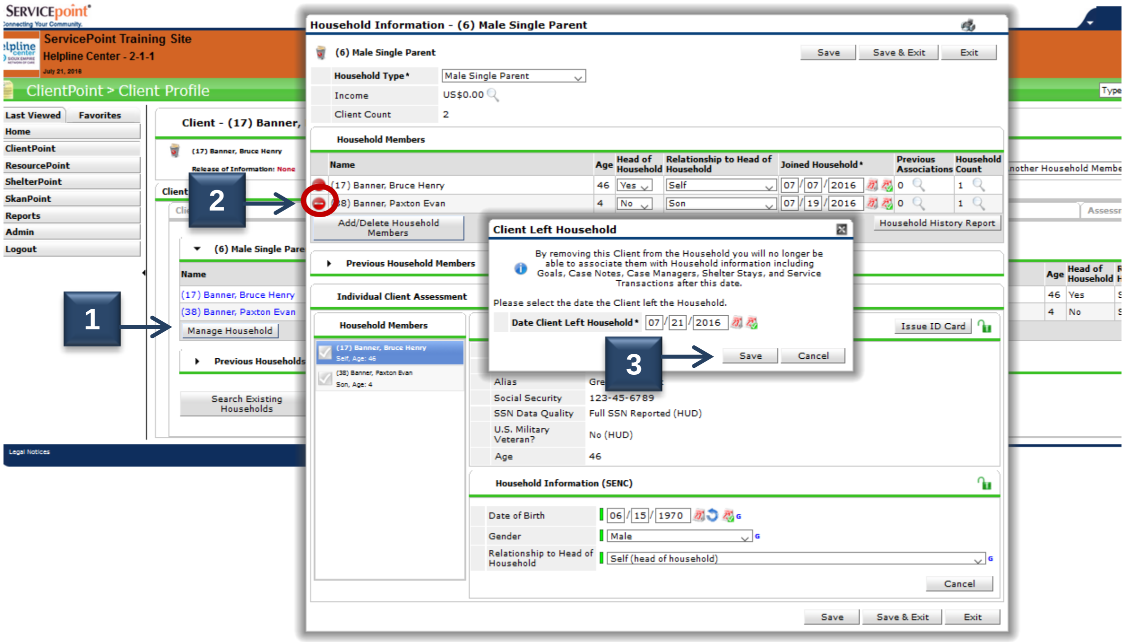
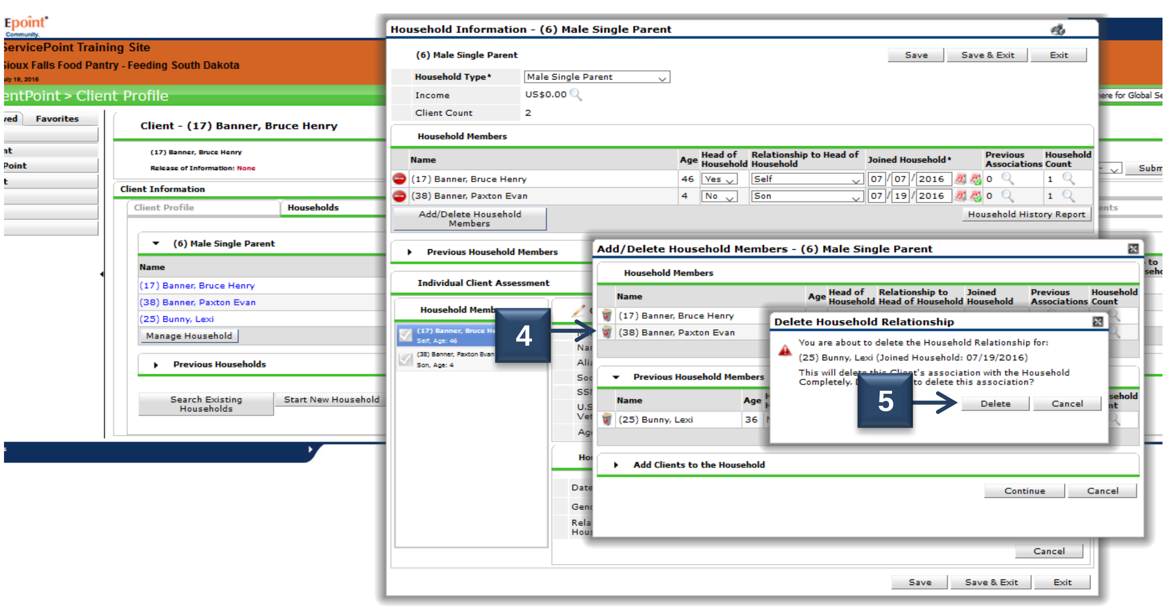


Figure 1-26

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

4. 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 next to the client's name. **(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)**

Figure 1-27



Adding a Release of Information (ROI)

****Each Adult Client MUST sign an ROI****

1. Search for and select a client in *ClientPoint*. (See page 3) or click Client Search- New & Existing Clients. 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).***

3. 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** – always enter: **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)

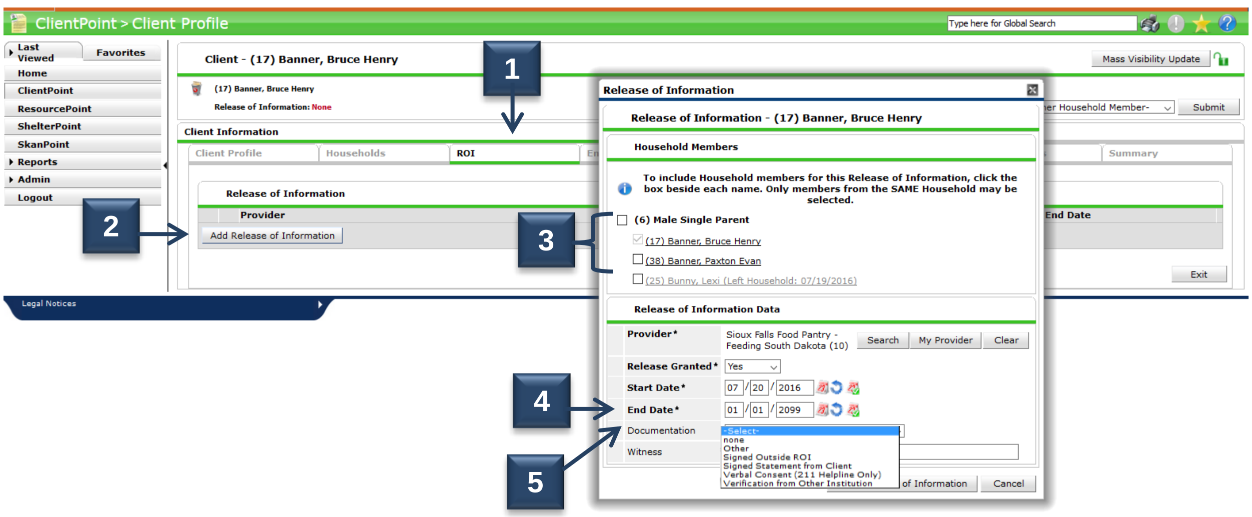


Figure 1-28

4. 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.

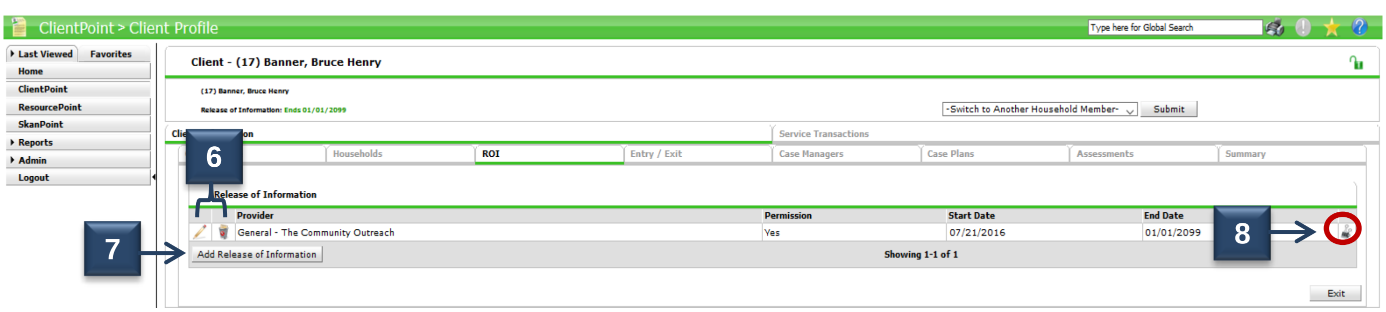


Figure 1-29