Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 2

Entry / Exit ~ Case Manager ~ Case Plans ~ Assessments



Icon Overview

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

۲	SerivcePoint Icon	SENC Partner Agency
4	Lock Icon	Agency Shared Information
ſu	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
0	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
<u>#</u> 3	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



Adding Entry / Exit

On the Entry/Exit screen the user may alter the information pertaining to the client and their shelter stay.

- 1. Click the Entry / Exit tab. (1) Click Add Entry / Exit. (2) The Entry Data screen will appear.
- 2. In the Household Members section if the client is not part of a household Client is not a member of any Households will appear. (3) Proceed to box number 4. (See Figure 1-30)
 - a. If client is a member of a household click the checkbox(s) next to the household member's names you wish to provide service to. In most cases, you will <u>ONLY</u> provide services to the primary client or the client 'pre-selected'. Proceed to box number 4.
- 3. **Provider*** will default to user's current provider. **Type*** should always be listed as <u>BASIC</u>. Entry date* will default to the current date. (4)
- 4. Click Save & Continue. The Entry / Exit Data screen will appear. (See Figure 1-31)

ClientPoint > Client	: Profile						Type here for Global Search	S 🛛 🛨 🤇
Last Viewed Home	Client - (17) Bann	er, Bruce Henry		1				ſ
ClientPoint	(17) Banner, Bruce Henr	y						
ResourcePoint	Release of Information	Ends 01/01/2099					-Switch to Another Hou	usehold Member- 🗸 Subm
SkanPoint	Client Information			V	Service Transactions			
Reports	Client Profile	Households) ROT	Entry / Exit	Case Managers	Case Plans	Assessments	Summary
Admin								
Logout			Entry Data - (17) Bar	nner, Bruce Henry			×	
	Entry / Exit		Household Memb	ers				
2	Add Entry / Exit		i To include Hous Or	sehold members for thi nly members from the s	s Entry / Exit, click the bo SAME Household may be se	x beside each name. elected.	Exit Date	Interims Ups Count
		3	(0) Male Single P	e Henry				Exit
Legal Notices			(38) Banner, Paxt (25) Bunny, Lexi	<u>ion Evan</u> (Left Household: 07/19/20	16)			
			Entry Data - (17)	Banner, Bruce Henry				
Figure 1-3	D		Provider*	General - The Con	nmunity Outreach (12) 🗸			
		4	Type*	Basic	~			
			Entry Date*	07 / 21 / 2016	週 🔿 🥂 1 🗸 : 45 🗸 : 55	V PM V		
					Sav	e & Continue Cance	al	

- 5. Click the Edit icon *i* to alter the entry or the Basic Intake (SENC) (5) (if necessary).
- 6. Click Save & Exit to return to the Entry / Exit dashboard. To Edit the Entry / Exit from dashboard Go to step 8. (If
- necessary)
 7. *If / When* a Client ends their Services - enter an **Exit date**. (6)

		Entry/Exit Data
ls their	ing Site inity Outreach	Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/ED Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessmen record for the Client.
(a) atch	th Dec Gla	Provider * General - The Community Outreach (12) v
uale. (0)	it profile	Type* Basic V
	Client - (17) Banner, Bruce Henry	Update
	(17) Banner, Bruce Henry	Household Members Associated with this Entry / Exit
	Release of Information: Ends 01/01/2099	Name Head of Entry Date Exit Interims Follow Reason for Destination N
	Client Information	→ (17) Banner, Bruce / 07/21/2016 / E E
	Client Profile Households	Include Additional Household Showing 1-1 of 1
	Entry / Exit	Entry Assessment
	Program	Heuraheld Members Basic Tetake (EEHC) Entry, Date: 07/21/2016 02:22:50 DM
	Add Entry / Exit	(37) Barrier, Bruce Henry
		Age: 45 Veterar: No (NUD) *Note: If needed, please enter Household Information in Household tab.
		Date of Birth 06/15/1970 20 0 0
		Gender Male G
		Primary Race White (HUD)
		Ethnicity Non-Hispanic/Non-Latino (HUD) 🗸 G
		Marital Status Divorced V G
		Highast Laval of College Degree v
		Client's Residence / Last Permanent Address
		Client's Client's Client's Client's Client's Client's Current Street Apartment ZIP City State Residen Address
		2 1000 Umbrella 22 57104 Sioux Falls South Dakota No
		1919 America 13 57106 Sioux Falls South Dakota Ves
		Z000 S. Beach Drive Drive S7004 Beresford South Dakota No
		5 Add Showing 1-3 of 3
		Contact Method
Figure 1-31		Contact Method Type Phone Number/ Email informati via text?
-		Email Greeb80@yahoo.com
		Cell Phone 605-444-1234 Yes
		Cell Phone 605-822-1245 Ves Add Showing 1-3 of 3
		a disabling condition?
		Oisabilities Disability Type Start Date* Note on Disability
		Hearing Impaired 06/26/2016
		C Employment Teformation
		Type of Employment Employer Name Current
		Full Time Target Ves
		Part Time Taco Bell No
		Tabl Markly Terrers 1200
		Covered by Health Insurance I (200 G I (000 G I
		Save Save & Exit Exit
		Print Entry/Exit Symmary

8. To edit an Entry / Exit from the dashboard screen. Click the Edit icon // next to the Entry Date. (6) Click Save & Continue to open Entry / Exit to edit. (See Figure 1-32)

Client	Information			Service Transactio	ns							
Clie	nt Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans		Assessments) Su	mmary		
			() Reminder: Household	members must be establ	ished on Hous	b before creating	g Entry / Exit	s				
	Entry / Exit				Ļ							
	Program			Туре	¥ و	ntry Date	Exi	it Date	Interims	Follow Ups	Client Count	
1	General - The Com	nmunity Outreach (12)		Basic	🦯 C	8/08/2016	/		E.	E.	8	÷.
1	General - The Com	nmunity Outreach (12)		Basic	🦯 C	7/26/2016	/ 08	/26/2016	E.	E.	8	ile .
1	General - The Com	munity Outreach (12)		Basic	🧪 C	7/26/2016	/		E.	E.	8	i kan an a
1	General - The Com	munity Outreach (12)		Basic	🖉 C	7/26/2016	1		E.	E.	8	i kan bar an
1	General - The Com	nmunity Outreach (12)		Basic	🦯 C	7/21/2016	/		E.	E.	8	i kan an a
1	General - The Com	munity Outreach (12)		Basic	🦯 C	7/21/2016	/		E.	E.	0	i kan an a
	Add Entry / Exit				Showin	g 1-6 of 6						
												_
											Exi	it

Figure 1-32

Adding a Case Manager

The dashboard counts reports that start with the word "My," such as "My Clients," are designed to return only those clients who have the current user listed as a case manager.

1. Open a client record in ClientPoint to link a user to a case manager. Click the Case Manager tab. Click Add Case Manager.

		📔 ClientPoint > Clie	nt Pr	ofile							Type here for Global Search	🧫 🕕 🖈 🖉
	Ì	Last Viewed Favorites		Client - (17) Banner, B	Fruce Henry				2			ſu
1	≯	ClientPoint ResourcePoint		(17) Banner, Bruce Henry Release of Information: None						-Switch to Another	Household Member- 🗸 Submit	
		SkanPoint Reports	Clie	nt Information) Hausabalda	Ŭ POT		Eabou / Exit	Service Transactions	Care Blanc) Assessments	Y cummany
		Admin Logout			nousenoius	_ NOI		Endy / Exic	Case managers	Case Plan5	Assessments	Jummary
		3		Case Managers Name	Provider		Phone Num	ber		Start Date	End Date	
			≯	Add Case Manager						No matches.		
												Exit
							F	iaure 1-47				

- To include Household members for this Case Manager, if the client is a member of a household click the checkbox(s) next to each client name in the Household Members section. (3) If the client is not part of a household This Client is not a member of any Households will appear. Only members from the SAME Household may be selected. In most cases, you will ONLY assign a Case Manager to the primary client or the client 'pre-selected'.
- The default selection is ServicePoint User. This setting allows searches of any user in ServicePoint. By selecting Me this will automatically choose the current user as the Case Manager. Alternatively, Other can be selected to enter a name for a case manager who isn't in the system. (4) Select User from the picklist (5) Once a selection is made, click Add Case Manager. (See Figure 1-48)

Note: If ServicePoint User or Me were selected as the Case Manager Type, the case manager will be linked to the user.



4. Click Exit to return to the ClientPoint search screen. (See Figure 1-49)

ClientPoint > Clie	nt P	rofile							Type here for Global Search	🤹 🕕 📩 (
Last Viewed Favorites Home		Client - (17) Banner, Bruce Henry									
lientPoint		(17) Banner, Bruce Henry									
esourcePoint		Release of Information: None						-Switch to Another House	old Member- 🧹 Submit		
SkanPoint	Cli	ent Information				Service Transaction					
Reports	ſ	Client Profile	Households	ROI	Entry / Exit	Case Managers		Case Plans	Assessments	Summary	
ocout f											
		Case Managers									
		Name	Prov	vider			Phone Nur	nber	Start Date	End Date	
		🦯 🧔 🧋 Kayla Connelly	Gen	eral - The Community Outreach			605-331	-3935	07/14/2016		
		Add Case Manager					Showin	g 1-1 of 1		\sim	
										Exit	
I											



Adding a Case Plan (GOALS) - *Case Manager(s) must be selected before adding a Case Plan*

If Case Managers assignment to a client ends – add an end date and select a new Case Manager. Never change the previous Case Manager(s) in a Client Record always add new.

1. Once you are working with a client profile, click the gray **Case Plans** tab. (1) The screen will refresh and display the Case Plans screen. (See Figure 1-50) To create a Case Plan, you must have a goal. Click **Add Goal** to open the next screen. (2)

ClientPoint > Client	Profile					Type here for Global Search	🤹 () 🛨 🖉		
Last Viewed Favorites	Client - (17) Banner, Bruce Henry				1		Mass Visibility Update		
Home ClientPoint	🦉 (17) Banner, Bruce Henry								
ResourcePoint ShelterPoint	Release of Information: None Client Information			Service Transacti	ions	-Switch to Another Ho	susehold Member- V Submit		
SkanPoint Reports	Client Profile Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary		
► Admin Logout	Goals								
2	Classification Add Goal	Туре	Date Added	Date Set ▼	Note No matches.	es Latest Note Date			
	Case Plans File Attachments								
	Add New File Attachment			Name D	escription Type P No matches.	rovider			
	Print Case Plan						Exit		
1			Figure 1-5)					

2. The screen will display the Case Notes, Action Steps Planned and Service Items for this Goal section. Scroll down to see each see area. (See Figure 1-51)

Complete as necessary for your agency Case Plan requirements

ClientPoint > Clie	ent Profile	Goal 🧔 🖾	x	Type here for Global Search 🧔 🕕 🌟 👔
Last Viewed Favorites Home	Client - (17) Banner, Bruce Henry	Goal - (17) Banner, Bruce Henry		1
ClientPoint ResourcePoint SkanPoint	(17) Banner, Bruce Henry Release of Information Nene Client Information	Household Hembers To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.		-Switch to Another Household Member J Submit
Reports Admin Logout	Client Profile Households	(6) Male Single Parent (<u>17) Banner, Bruse Henry</u> (73) Banner, Chure Binn		ns Case Plans Assessments Summary
	Classification Add Goal Case File Attractmente	Lead antimized in the second		Notes Latest Note Date No matches.
	Lase rians rire Attachments Date Added ▼ Add New File Attachment Print Case Plan	Classification* Employment Type* Get A.32b Cest Description Geal: To have a job by August 1, 2016.		Description Type Provider He matches.
usentetes Figure 1-	-51	Target Date (BP/(S1/E016) #) % Overall : Edentified Backson // Backson /		
		Follow Up Mode Select: Completed Follow Up Date /// #0 % % Outcome at follow Up Select: Add Goal Cancel		

Adding Action Steps Planned *A goal must be created to add an Action Plan*

 Locate the Goal to which you would like to add an action step. Click the Edit icon next to the Goal. (1) The Goal will open. Scroll down to see the Action Steps. You can add Case Note, Action Steps Planned and Service Items for goal overtime. (See Figure 1-52)



Figure 1	-52
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Click Add Case Notes. (2) The Case Notes window will display. Provider will default to user's current provider. Select Case Manager. Note Date will default to current date. Add Notes to include further information regarding the Goal. (3) Click Save Case Note. Click Cancel to exit without saving Case Note. (See Figure 1-53)



3. Click Add Action Step. (4) The Action Steps Planned window will display. (See Figure 1-54)

Figure 1-53

▶ Reports	was Set 07 / 14 / 2016 20 20
▶ Admin	Client Profile Households Classification* Employment
Logout	Type* Get A Job
	Goals Goal: Classification Type Goal: Goal: Goal: Goal: Goal: Classification Goal: Goal: Classification Goal: Classification Classification Goal: Classification Classifica
	✓ g Employment Get A.
	Add Goal
	Case Plans File Attachments Overall * Identified \u2222
	Date Added - If Closed, Outcome -Select-
	Add New File Attachment If Partially Complete Parcent -Select
	Print Case Plan Print
Legal Notices	
	General - The Community Outreach (12) ↓ Kayla Connelly ↓
	Follow Up Made
	Completed Follow Up Date / / 2 3 3
re 1-54	Outcome at Follow Up Select-
	Case Notes
	Provider Case Manager User Creating Note Date Note
	General - The Community General - The Connelly Riley Zaft Understond with Clean that he needs to find a job / Connelly Connelly Riley Zaft 07/14/2016 for his rest Cleans will weak until he has found a job.
	Add Case Note Showing 1-1 of 1
	Action Steps Planned
	Action Step Target Date Status Outcome
	Add Action Step No matches.
	Service Items for this Goal
	Date Set Created By Need Type Need Status Outcome of Nee
	Add Service Add Multiple Services No matches.

- 4. Complete each field in the Action Step section:
 - a. By default, the **Provider** associated with the action step will display.
 - b. The **Date Action Step was Set** in mm/dd/yyyy format or use one of the date auto-fill icons. By default it will be set to the current date. (5) (See Figure 1-55)
 - c. Describe the step in the Action Step text box. (6)
 - d. Enter the date by which the action step should be completed in the Target Date field (7) or use one of the auto-fill icons.
 - e. Select the Overall Status of the action step from the picklist provided. (8)
 - f. If Closed, Outcome: there may be a possibility that the case plan is entered and the goal may be met on the same day and it is being entered in one step. If so, select the outcome and date of outcome. (9)

5. Complete each field in the follow up section:

- g. **Projected Followup Date**: If there will be a follow-up on this action step, enter the date you anticipate the follow-up will take place or select from one of the auto-fill icons. **(10)** (See Figure 1-55)
- h. **Follow Up User**: This is the user who is assigned to follow up with the client. A picklist of available users appears based on the provider. Click **My Provider** to select your default provider for which the user list will be associated. Select the user from the pick list. **(10)**
- 6. Once the follow up has been complete follow up made section:
 - i. Follow Up Made: Select the status from the picklist. (10) (See Figure 1-55)
 - j. Completed Follow Up Date: Enter the date the follow-up was completed or select from one of the auto-fill icons. (10)
 - k. Outcome at Follow Up: Select from the options in the picklist. (10)

7. Click **Save Action Step**. The Action Step Data window will close. The Action Step screen will refresh and display the action step details in the Action Steps Planned section. (See Figure 1-56)

Date Added 🔻	Action Step - (17) Banner, Bruce Henry	
ile Attachment	Household Members	
Plan	No Household Members were originally associated.	
	Provider* General - The Community Outreach (12) v	
5	Date Action Step * 07 / 26 / 2016 🕂 🦓	
	Action Step* Bruce Banner needs to show proof of insurance.	
6		
	Target Date 08 / 01 / 2016 0 0	
7	Overall Status* Identified ~	
	If Closed, Outcome -Select- v / /	II 🕽 Z
	- Projected Follow Up Date 08 / 01 / 2016 🕂 🏹	
	Follow Up User General - The Community Outreach (12) V	
	Kayla Connelly 🗸	
\mathbf{H}	Follow Up Made -Select- V	
	Completed Follow Up Date 🛛 / 🚽 🜌 💐 🦉	
	Outcome at Follow Up -Select-	



8. Click **Add Service** in the Service Items for this Goal area. (See Figure 1-56) Since you will be taken to another screen, a warning window will appear to make sure you want to proceed. Click **Ok**. **(11)**

	Action Steps Planned	Action Steps Planned								
	Action Step	Target Date Status Outcome								
	Z 💐 Bruce Banner needs to show proof of insurance.	08/01/2016 Identified								
	Add Action Step She	owing 1-1 of 1								
	Service Items for this Goal									
	Date Set Created By Need Type	Need Status Outcome of Need								
11	Add Service Add Multiple Services	No matches.								
	Print Save	Goal Save & Exit Exit								

Figure 1-56

 The Service Transactions window will appear. Complete Add Service section. See <u>Adding a Service</u> process in Section 2. The Service will now be attached to the Case Plan.





Assessments

Assessment can be created for each agency to fit their necessary need. Assessments are not globally shared.

- 1. If your agency has an assessment created in SENC click the Assessments tab. (1)
- 2. Click the drop down arrow under Select an Assessment. Click Submit. (2) (See Figure 1-57)
- 3. The assessment will appear. Complete assessment and click Save or Save & Exit.

Client - (17) Banner, Bruce Henry Mass Visibility Update								Mass Visibility Update
Ĺ	(17) Baner, Bruce Henry Release of Information: None -Switch to Another Household Member- Submit							
-	Client Information	Households	ROT	Entry / Exit	Service Transactions	Case Plans	Assessments	Summary
	Client Assessment No Client Default Assessment is specified for this Provider				Submit		1	

Figure 1-57