



How-To Guide

ServicePoint 4.04

- ClientPoint -

Creating Client and Household Records

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How-To

Create a client record

Record creation happens in the ClientPoint area of ServicePoint.

1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client. Click Search for Client. (Always run a search to see if the client is in the system.)

The screenshot shows the ServicePoint web application interface. At the top right, it says 'The Planning Council Sep 21, 2009' and 'The Planning Council / Norfolk'. Below the header is a navigation menu with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, Help, and Logoff. The 'ClientPoint' tab is highlighted. Below the navigation menu is a section titled 'Search Using Client ID.' with a text input field for 'Scan or Enter Client ID' and buttons for 'Search This ID' and 'Delete This ID'. Below that is a section titled 'Quick Call Information' with a checkbox for 'Grant ROI for call' and a 'Start Quick Call' button. Below that is a section titled 'Search for Existing Client' with the instruction 'Search for client before adding a new client.' and input fields for 'First', 'MI', 'Last', and 'Suffix'. There are also input fields for 'SS#' and a 'Search Filter' section with radio buttons for 'Exact Match?', 'Search only active clients?' (which is selected), 'Search only inactive/deleted clients?', and 'Search all clients?'. At the bottom of this section is a 'Search For Client' button. Three red callout boxes with arrows point to the 'ClientPoint' tab, the search data entry fields, and the 'Search For Client' button.

3. If client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client with this Information button.

Possible Matches area. In this example none are found.

Add a Client

The screenshot shows the ServicePoint interface with the following sections:

- Possible Matches:** A table with columns Name, SS#, Date of Birth, Gender, and Banned. It displays "No matching Clients found." and navigation links like "<<First <Prev | Next> Last>>".
- Search Using Client ID:** Includes a text input for "Scan or Enter Client ID" and buttons for "Search This ID" and "Delete This ID".
- Quick Call Information:** Includes a checkbox for "Grant ROI for call" and a "Start Quick Call" button.
- Add Client With This Information:** Includes fields for "First" (Jonathan), "MI", "Last" (Doe), and "Suffix". It also has "SS#" fields and a "Search Filter" section with radio buttons for "Exact Match?", "Search only active clients?", "Search only inactive/deleted clients?", and "Search all clients?".

- On the client profile page, enter the Social Security Number and the Social Security Number Type.
- Click the Entry/Exit button.

Client - doe, jonathan (#6652)
Release of Info: None

Buttons: ENTRY/EXIT, ROI, RESOURCEPT, CASE WORKERS, SECURITY

- Click Add Entry/Exit

Entry/Exit (doe, jonathan)

Program	Type	Entry Date	Exit Date
No Entry/Exits found for this client.			

Note: Household members must be established on Profile before creating Entry/Exits.

- Complete the Required Universal Data Elements for this client and click the Save and Close button on the bottom right of the pop-up window.

***NOTE* Required Universal Data Elements** contains elements required by HUD that pertain to individual members of a household. This is completed for each person in a household and applied only to that individual.

8. Click the Close button.
9. Click the Release of Information (ROI) button.

Release of Information (ROI) Button

Save Changes Button

Client - doe, jonathan (#6652)
Release of Info: **None**

Household Information - 0 Households - Click to Expand

Client Profile

Card Orientation: 1

Added to System Aug 15 2008 09:39AM

First MI Last Suffix

SS# - -

10. Fill in all the information.

NOTE ROI's are only good for 3 years. Make sure the end date reflects this.

11. Click Save Changes.

How-To

Create a client record

1. For a household you must first create a record for each member of the household by following steps 1-5. Once you have entered the individual records, you will create the household.
2. While viewing one of the household member's profiles (it does not matter which one), click to expand the Household Overview section at the top of the screen

Client - doe, jonathan (#6652)
Release of Info: **None**

Household Information - 0 Households - Click to Expand

Client Profile

Card Orientation: 1

Added to System Aug 15 2008 09:39AM

First MI Last Suffix

SS# - -

3. Click the Start New Household button.

Households Overview - Click to Collapse

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
No Households found for this client.						

- Complete the fields on this screen. Note whose record you are in when answering the Head of Household and Relationship to Head of Household questions. (The client is noted at the top of this screen.) Click Start NEW Household button.

Add Client to Household - (jonathan doe)

Household Type: Male Single Parent

Head of Household: Yes

Relationship to Head of Household: Self

Date Entered: 09/21/2009 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Start NEW Household Cancel

- Add all members to the household by using the drop-down profile listing and choosing the name.

Add Additional Clients to Household

"Search for Client" before adding a new client.

Last Profile: -Select-

First: MI Last: doe

Suffix:

SS#: - -

Search Filter: Exact Match?

- Answer the fields for the household member and click Add Household Member. Repeat steps 5 and 6 for each member of the household until all members have been added.
- Once you have added the last household member, click the Add Household Data button found in the Household Data Sharing bar. (Found on the main profile page or within the Add Clients to Household screen.)

Overview - Type: Male Single Parent, Current Members: 2 Removed Members: 0

Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
doe, jonathan (#6652)	Self	09/21/2009		Yes
Client, Joan (#5833)	Step-daughter	09/21/2009		No

Household Data Sharing

Add Household Data



8. Click a check mark into those household members that need this information (usually everyone) and answer the Universal Data Elements for the household. These answers will apply to all the checked individuals.
9. Click Save and Close. (If your household screen is still open click Save & Exit.)

Household members


To include household members in this "Household Assessment", click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:


*Client, Joan


Household Data Sharing Assessment  


Assessment Date 09/21/2009 03:44 PM

Type of Living Situation 


H G


Is Client Homeless?  **H G**

Extent of Homelessness?  **H G**


Is Client Chronically Homeless?  **H G**

Zip Code of Last Permanent Address **H G**

Zip data quality  **H G**

City of Origin  **H G**

Other City **H G**

State  **H G**

Optional Household Information

How-To

Search For and Update a Record

Updating records happens in the ClientPoint area of ServicePoint.


1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client (SS# is optional). The system only uses these three fields to search. *(If additional demographic fields appear on this screen, there is no need to complete the fields.)*

The screenshot shows the ServicePoint web application interface. At the top right, it says 'The Planning Council Sep 21, 2009' and 'The Planning Council / Norfolk'. Below the header is a navigation menu with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, Help, and Logoff. The 'ClientPoint' tab is highlighted. Below the navigation menu is a section titled 'Search Using Client ID.' with a text input field for 'Scan or Enter Client ID' and buttons for 'Search This ID' and 'Delete This ID'. Below that is a section titled 'Quick Call Information' with a checkbox for 'Grant ROI for call' and a 'Start Call' button with a 'Start Quick Call' sub-button. Below that is a section titled 'Search for Existing Client' with the instruction 'Search for client before adding a new client.' and input fields for 'First', 'MI', 'Last', and 'Suffix'. There is also an 'SS#' field with three sub-inputs. Below the search fields are radio buttons for 'Search Filter': 'Exact Match?' (unchecked), 'Search only active clients?' (checked), 'Search only inactive/deleted clients?' (unchecked), and 'Search all clients?' (unchecked). At the bottom of this section is a 'Search For Client' button. Three red callout boxes with arrows point to the 'ClientPoint' tab, the search input fields, and the 'Search For Client' button.

3. If client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client With This Information button.

Possible Matches
(*refine your results or add as new below*)

showing 1-1 of 1 (<<First <Prev | Next> Last>>)

Name	SS#	Date of Birth	Gender	Banned
 doe, jonathan (#6652)	222-22-2222			

showing 1-1 of 1 (<<First <Prev | Next> Last>>)

Search Using Client ID.

Scan or Enter Client ID

Quick Call Information

Grant ROI for call

Start Call

Add Client With This Information

Change your criteria and Search for client to reduce the potential matches.

First MI Last Suffix

SS# - -

Search Filter

Exact Match?

Search only active clients?

Search only inactive/deleted clients?

Search all clients?

Possible Matches area.
In this example there is one found.

Add a Client

4. On the client profile page, enter the Social Security Number and the Social Security Number Type.
5. Click the Entry/Exit button.
6. Click the pencil next to the name.
7. Complete or correct any of the Required Universal Data Elements for the client. Click Save and close.
8. Click the Add Household Data button and complete or correct the remainder of the Required Data Elements. Click Save and Close.