Norfolk ServicePoint

How-To Guide

ServicePoint 4.04

- ClientPoint -

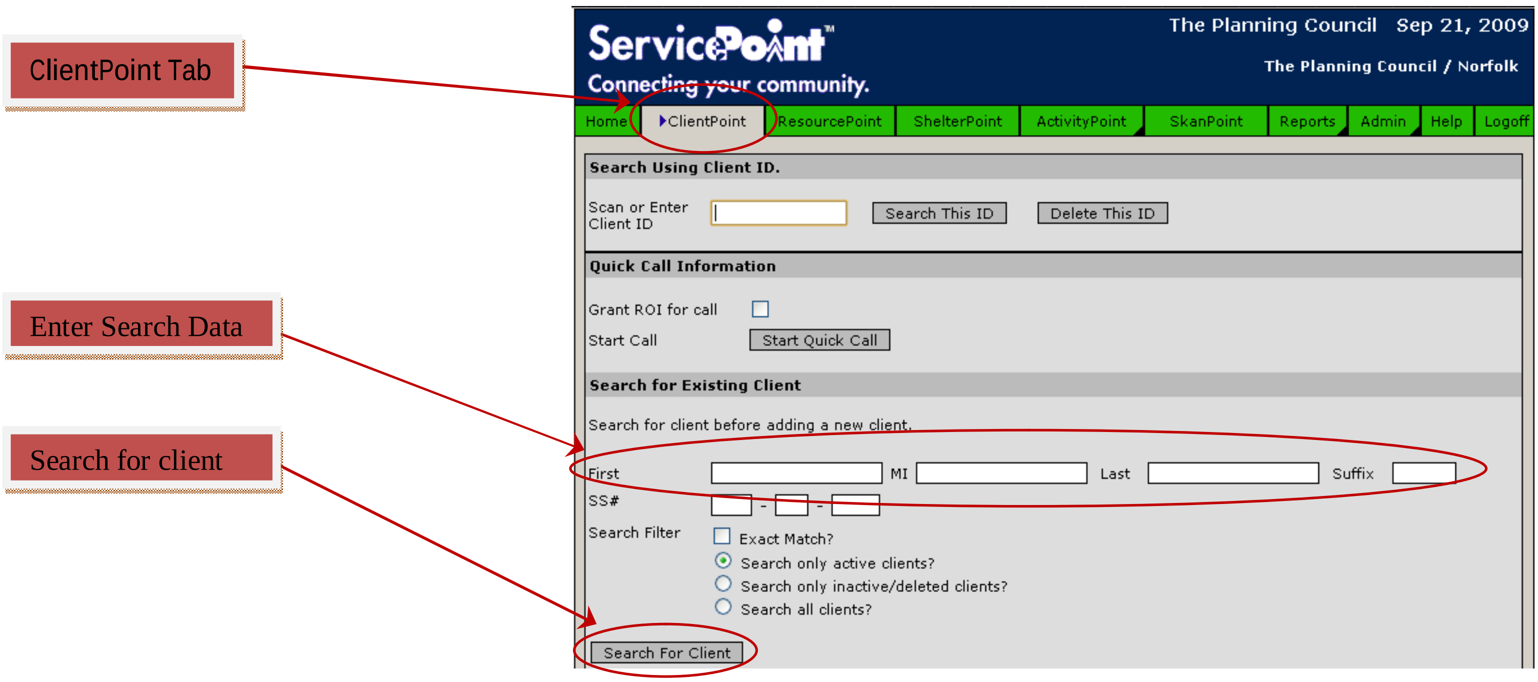
Creating Client and Household Records

Table of Contents

Create a client record

Record creation happens in the ClientPoint area of ServicePoint.

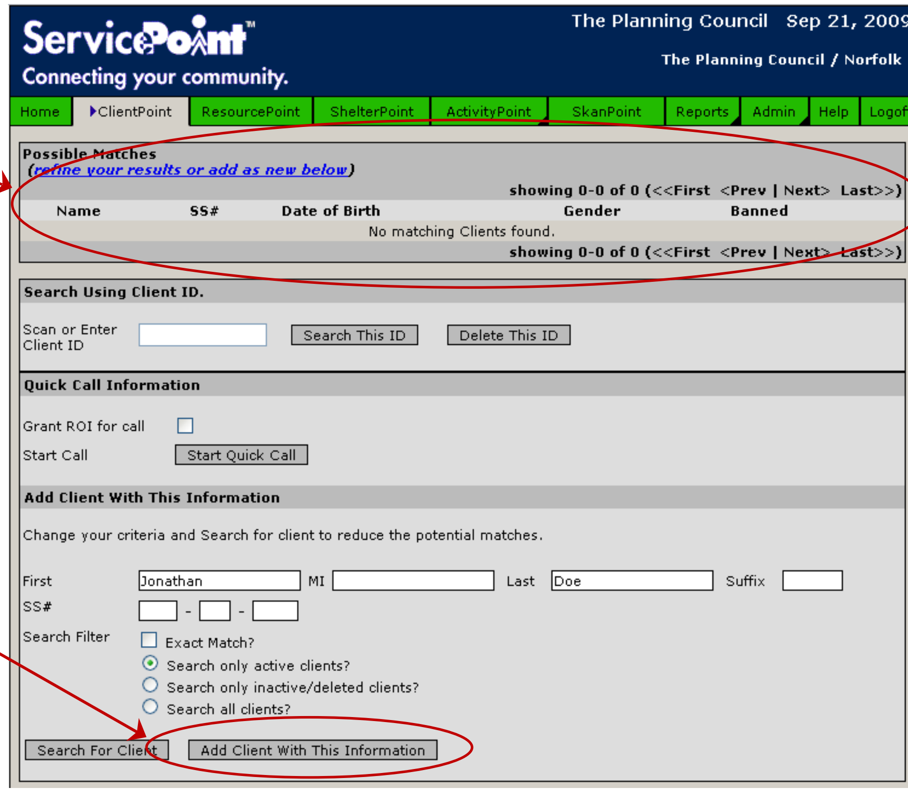
1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client. Click Search for Client. (Always run a search to see if the client is in the system.)



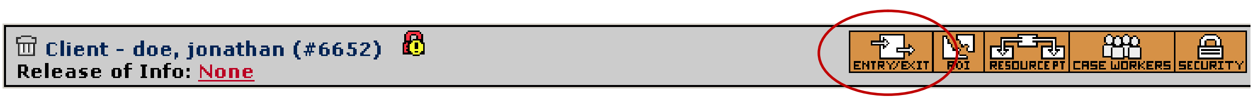
3. If client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client with this Information button.

Possible Matches area. In this example none are found.

Add a Client



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

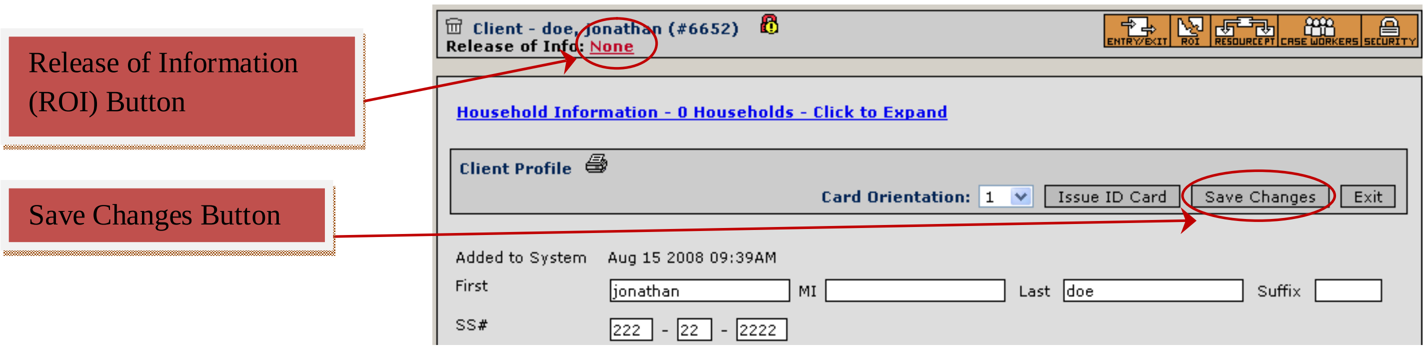


6. Click Add Entry/Exit

7. 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 Univeral 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.



10. Fill in all the information.

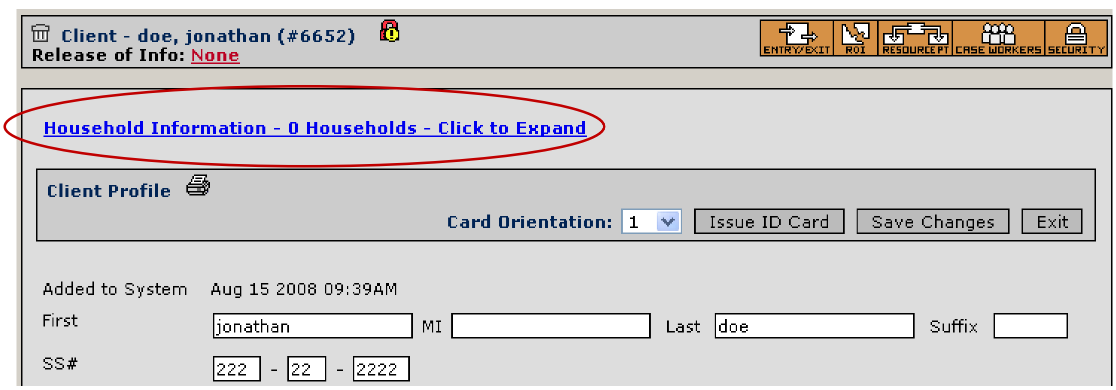
NOTE ROI's are only good for 3 years. Make sure the end date reflects this.

11. Click Save Changes.

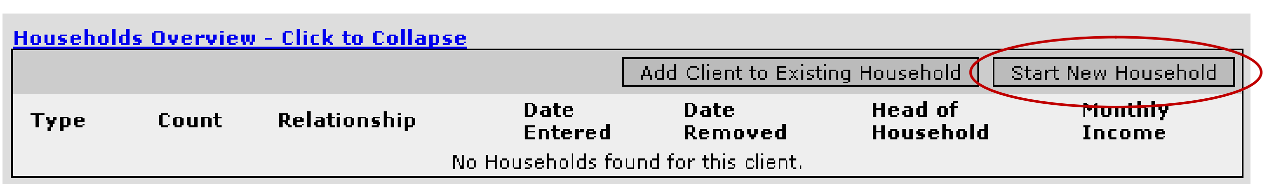
How-To

Create a client record

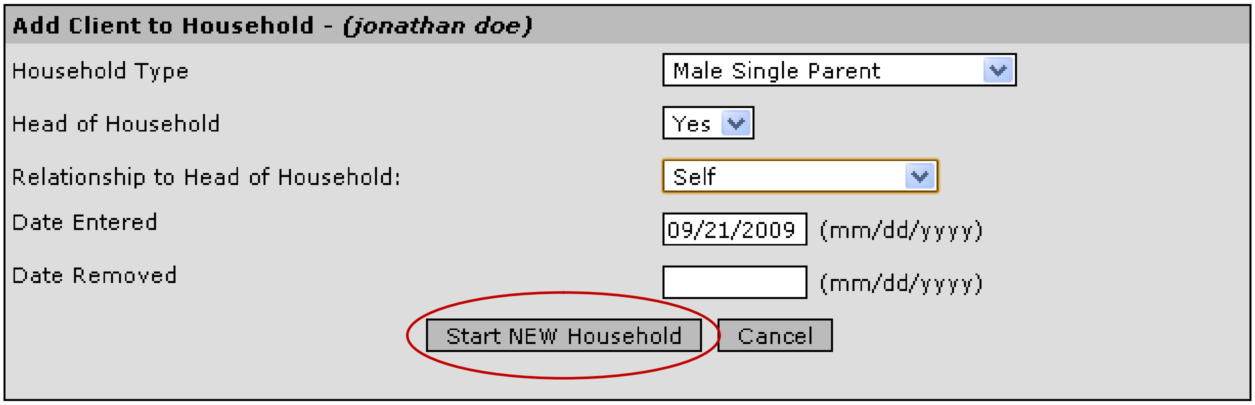
1. For a household you must first create a record for each member of the household by following steps 1-5. Once you have entered the individual records, you will create the household.
2. While viewing one of the household member's profiles (it does not matter which one), click to expand the Household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



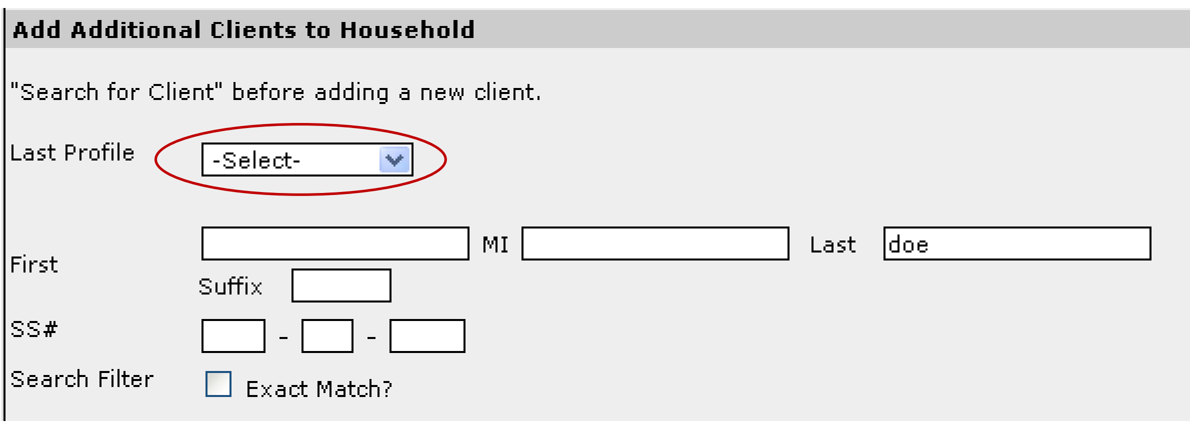
3. Click the Start New Household button.



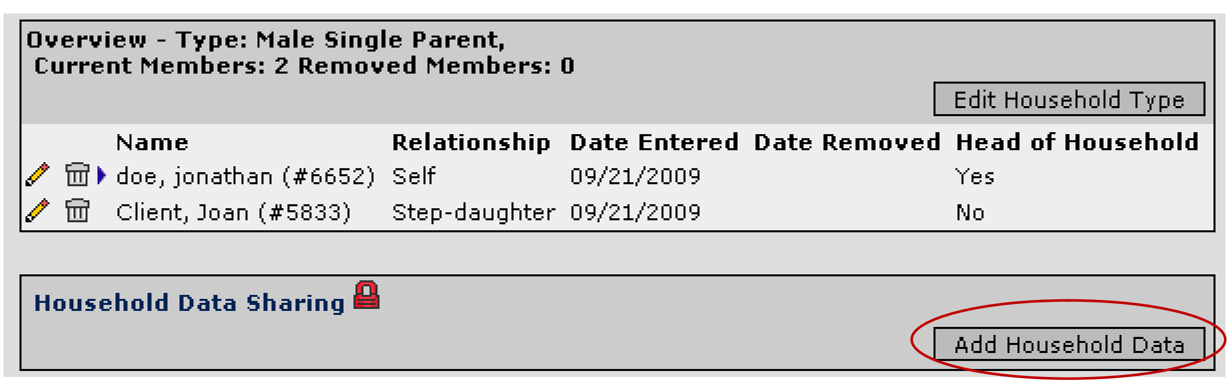
4. Complete the fields on this screen. Note whose record you are in when answering the Head of Household and Relationship to Head of Household questions. (The client is noted at the top of this screen.) Click Start NEW Household button.



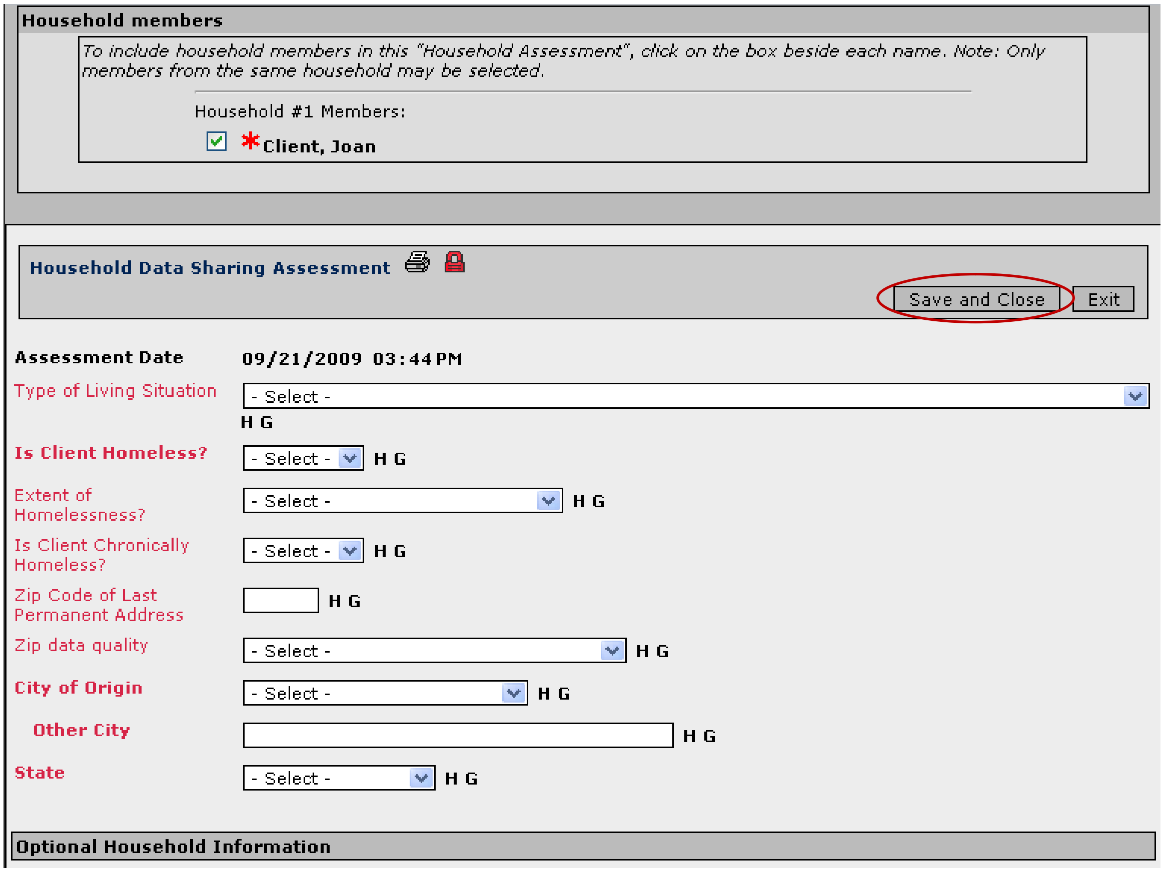
5. Add all members to the household by using the drop-down profile listing and choosing the name.



6. 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.
7. 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.)



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.)

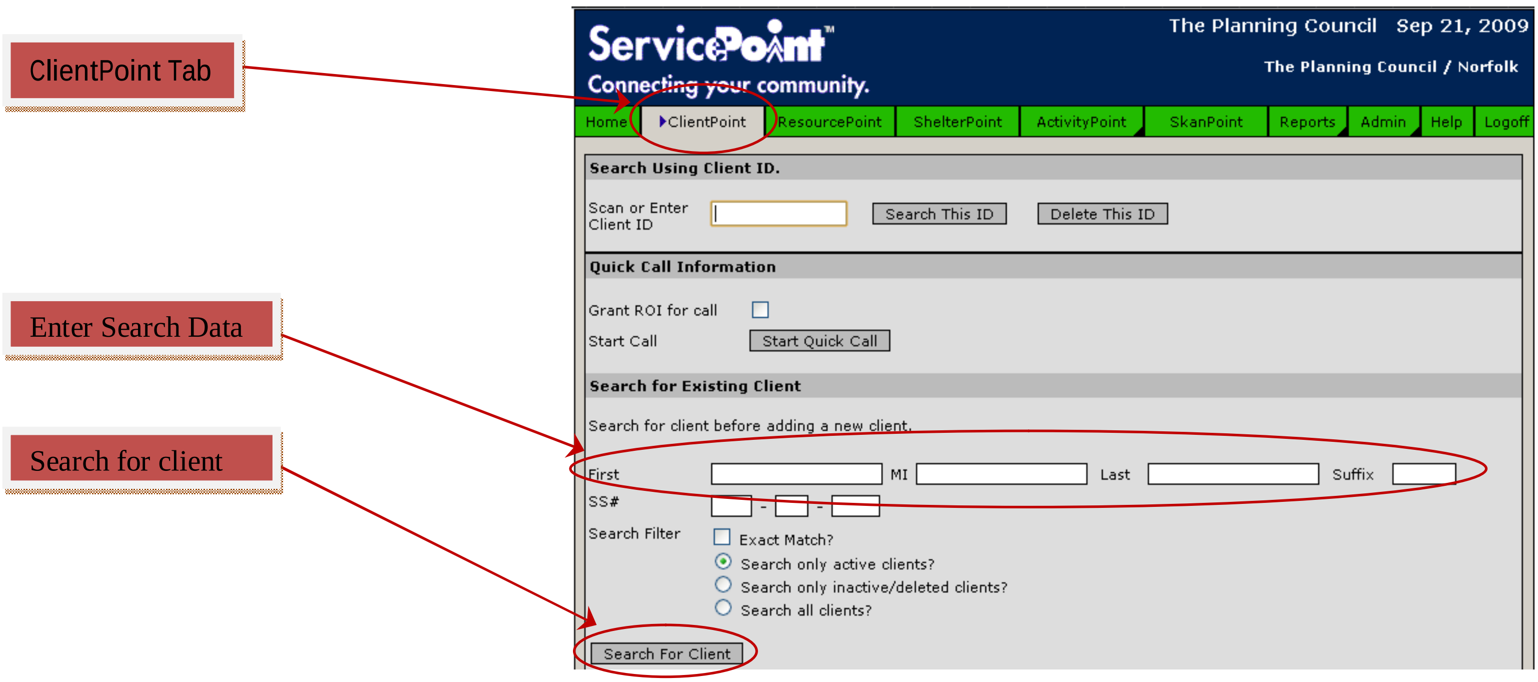


How-To

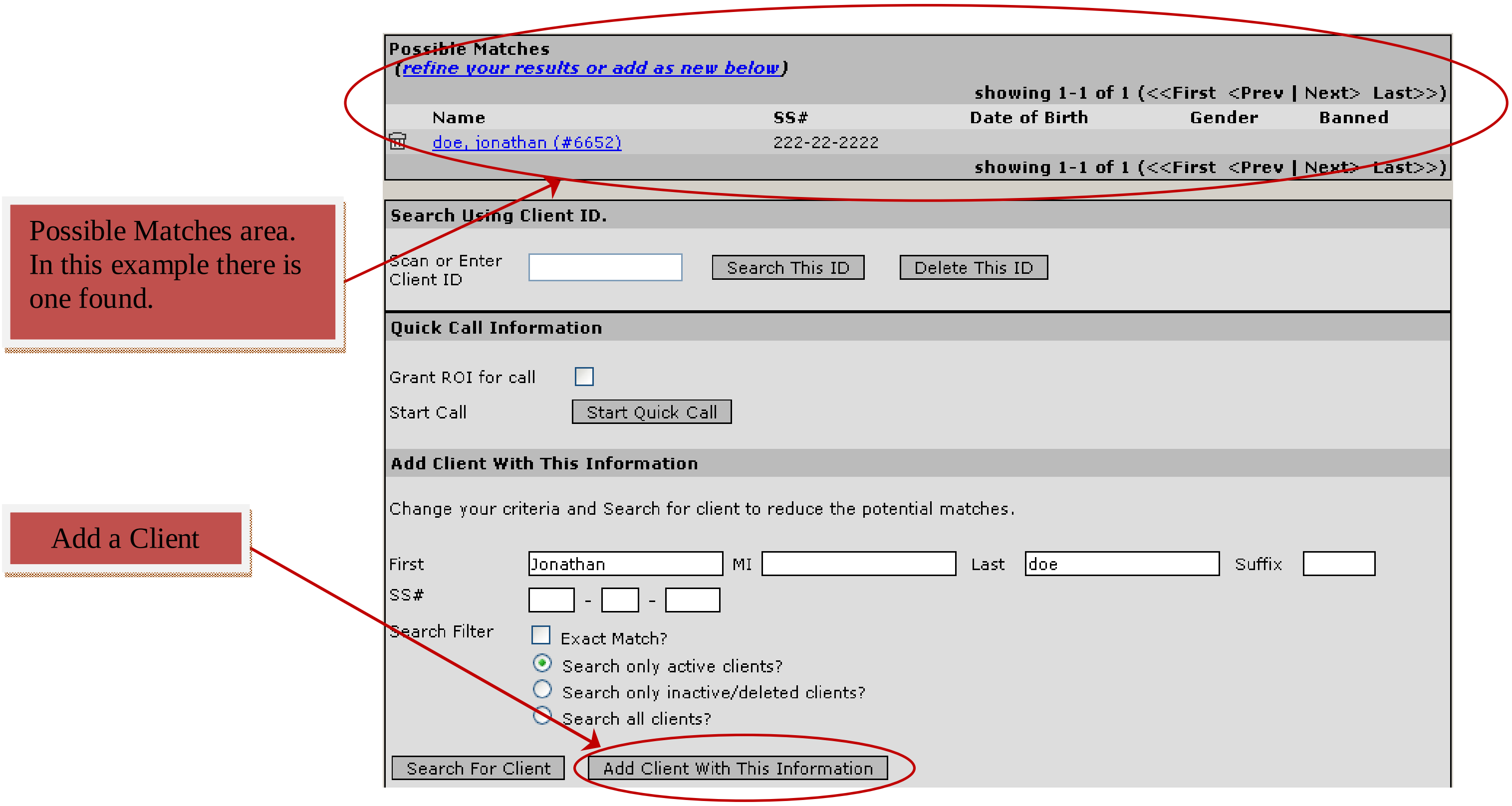
Search For and Update a Record

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.)*



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.



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.