



How-To Guide

ServicePoint 4.04

- HPRP ClientPoint -

Creating Client and Household Records For HPRP

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How-To

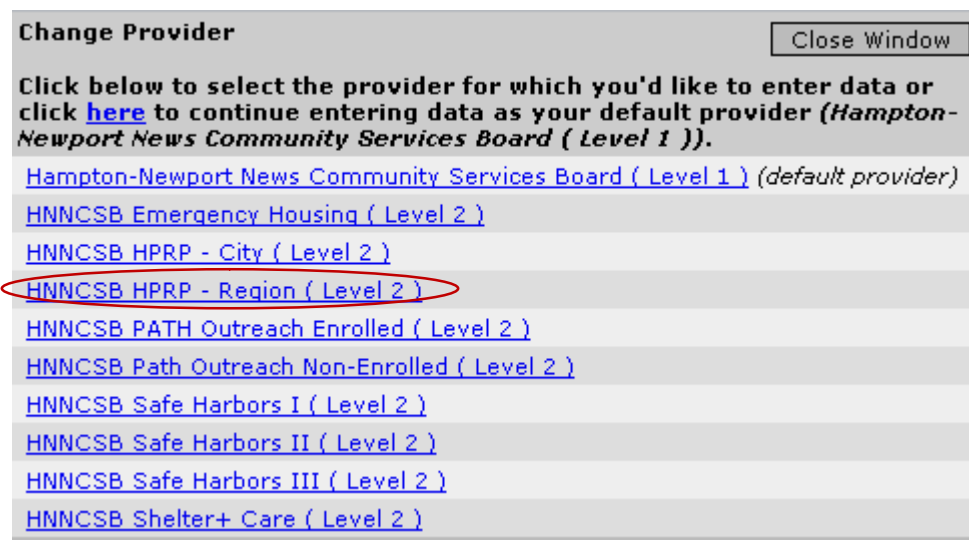
To get started entering HPRP clients

1. Click on [here](#) to change provider.



The Planning Council - Shelter Link II Nov 18, 2009
Hampton-Newport News Community Services Board / Hampton
Click [here](#) to enter data as another provider.

2. Select your HPRP program.



Change Provider Close Window

Click below to select the provider for which you'd like to enter data or click [here](#) to continue entering data as your default provider (*Hampton-Newport News Community Services Board (Level 1)*).

- [Hampton-Newport News Community Services Board \(Level 1 \)](#) (default provider)
- [HNNCSB Emergency Housing \(Level 2 \)](#)
- [HNNCSB HPRP - City \(Level 2 \)](#)
- [HNNCSB HPRP - Region \(Level 2 \)](#)
- [HNNCSB PATH Outreach Enrolled \(Level 2 \)](#)
- [HNNCSB Path Outreach Non-Enrolled \(Level 2 \)](#)
- [HNNCSB Safe Harbors I \(Level 2 \)](#)
- [HNNCSB Safe Harbors II \(Level 2 \)](#)
- [HNNCSB Safe Harbors III \(Level 2 \)](#)
- [HNNCSB Shelter+ Care \(Level 2 \)](#)

3. Now you are ready to start entering client for HPRP.
4. If you need to enter clients as normal, just click on the HPRP program and change back to your default provider.



The Planning Council - Shelter Link II Nov 18, 2009
HNNCSB HPRP - Region / Hampton
Entering Data As: [HNNCSB HPRP - Region](#)

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 displays 'The Planning Council Sep 21, 2009' and 'The Planning Council / Norfolk'. A navigation bar contains several tabs: Home, ClientPoint (highlighted with a red circle and a callout box labeled 'ClientPoint Tab'), ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, Help, and Logoff. Below the navigation bar, there are three main sections: 'Search Using Client ID.' with a text input field and 'Search This ID' and 'Delete This ID' buttons; 'Quick Call Information' with a 'Grant ROI for call' checkbox and a 'Start Quick Call' button; and 'Search for Existing Client' with a heading 'Search for client before adding a new client.' and input fields for 'First', 'MI', 'Last', and 'Suffix'. Below these are 'SS#' fields and a 'Search Filter' section with radio buttons for 'Exact Match?', 'Search only active clients?' (selected), 'Search only inactive/deleted clients?', and 'Search all clients?'. A 'Search For Client' button is at the bottom of this section, circled in red with a callout box labeled 'Search for client'. A callout box labeled 'Enter Search Data' points to the search input 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.

Possible Matches
([refine your results](#) or [add as new below](#))

Name	SS#	Date of Birth	Gender	Banned
No matching Clients found.				

Search Using Client ID.
Scan or Enter Client ID: Search This ID Delete This 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 none are found.

Add a Client

- On the client profile page, enter the Social Security Number and the Social Security Number Type.
- Click the Release of Information (ROI) 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# - -

Release of Information (ROI) Button

Save Changes Button

- Fill in all the information.

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

- Click Save Changes.

- Click the Entry/Exit button.



- Click Add Entry/Exit



- 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.

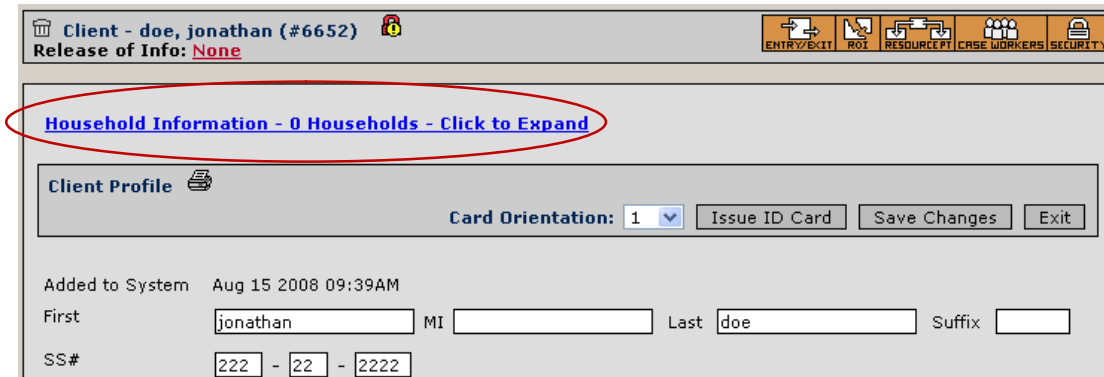
***NOTE* Required Universal Data Elements** contains elements required by HUD that pertain to individual members of a household. This is completed for each person in a household and applied only to that individual.

- Click the Close button.

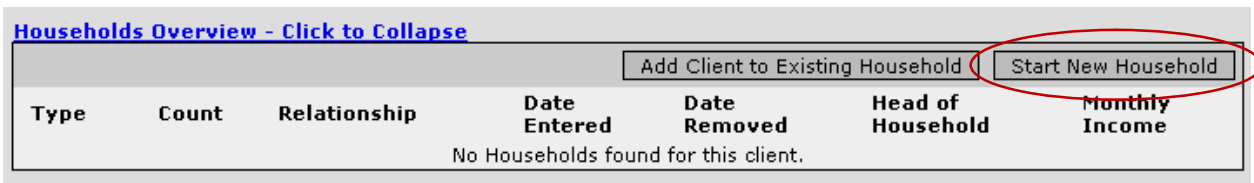
How-To

Create a client record with a household

- Search for or create the client record for the head of the household.
- Click to expand the Household Overview section at the top of the screen



- Click the Start New Household button.



- 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

- Answer the fields for the household member.
- Add all members to the household by using the First and Last name fields. Then search for the client, if the client is not found, then add the client.

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?

- When all members have been added, click Exit & Refresh.
- Click **None** for the Release of Info. Add a release for the client, remember to click the check boxes for the other members of the household. Then Save and Close.

Home ClientPoint ResourcePoint ShelterPoint ActivityPoint SkanPoint Reports Admin Help Logoff

Profile Assessments Matrix Case Plans Service Transactions Activities

Client - doe, jonathan (#6251)
Release of Info: **None**

ENTR/EXIT ROI RESOURCEPT CASE WORKERS SECURITY

Households Overview - Click to Collapse

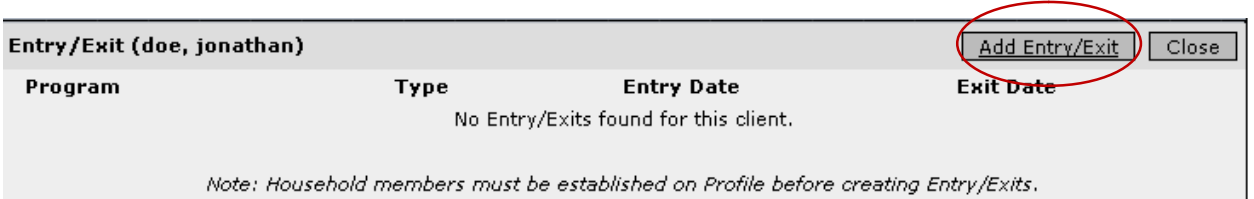
Add Client to Existing Household Start New Household

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
Male Single Parent	H 2					
doe, jonathan		Self	11/18/2009		Yes	
doe, jane		Daughter	11/18/2009		No	

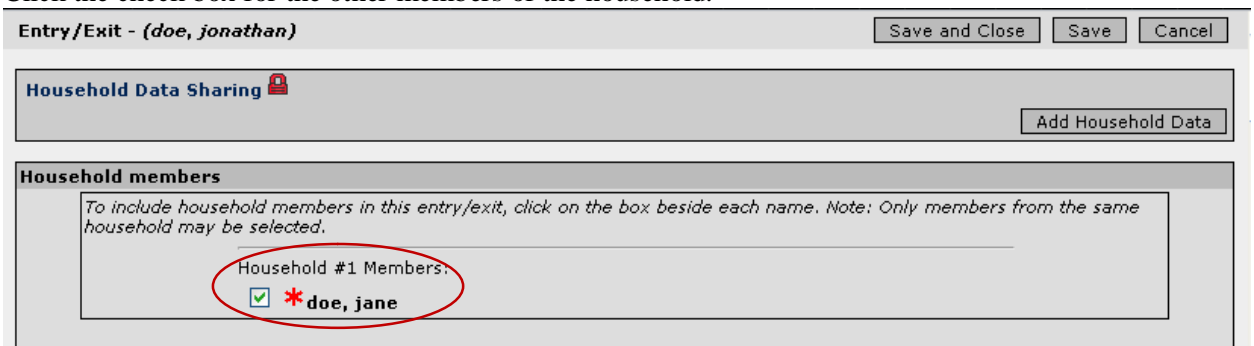
- Click the Entry/Exit button.



- Click Add Entry/Exit



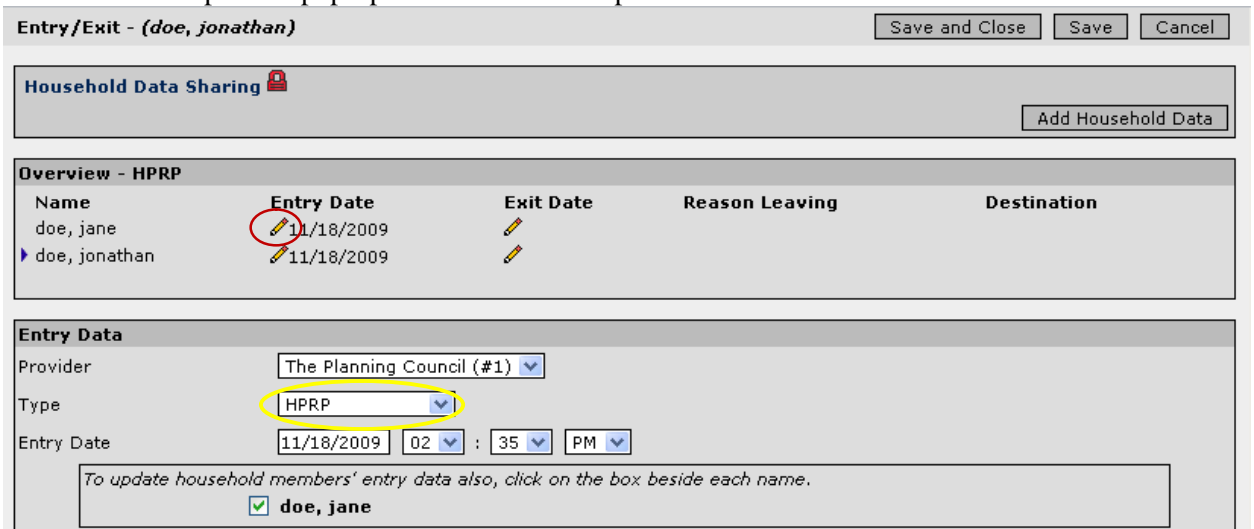
- Click the check box for the other members of the household.



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

***NOTE* The Type must be set to HPRP to be counted by the reports.**

- Go back to the top of the pop-up window. Click the pencil next to the next household member.

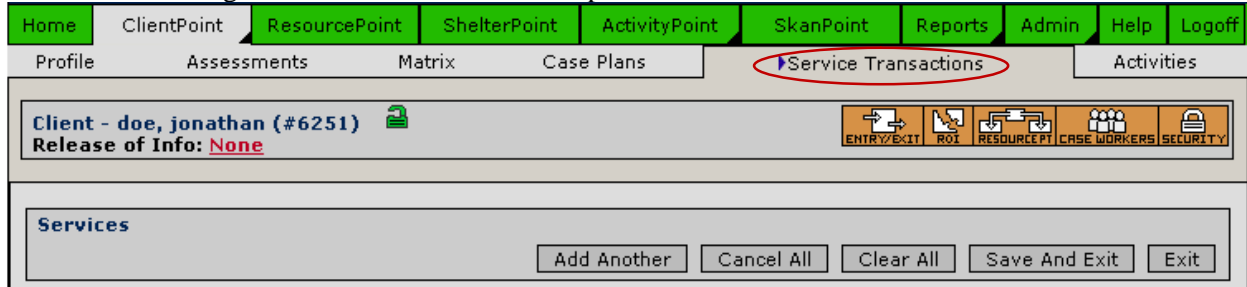


- After the screen refreshes enter the Required Universal Data Elements for this client.
- Repeat steps 12-14 for all members of the household.
- After all members are completed click the Save and Close button.

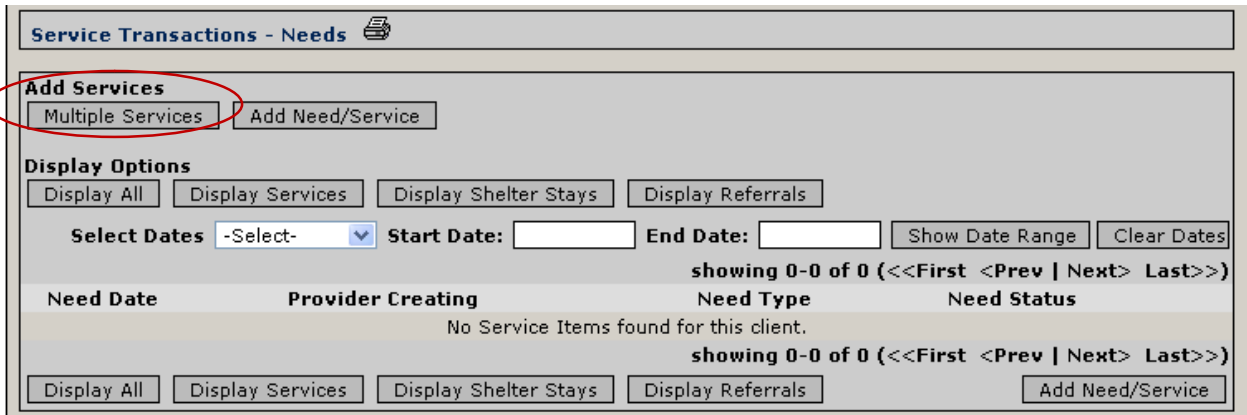
How-To

Add services to clients

1. Once the client and household members have been entered into the program (Entry/Exit), we can add services.
2. Under the green bar there is a sub set of options for ClientPoint. Click on Service Transactions.



3. Under Add Services, click Multiple Services.



- Answer all the drop down boxes and fill in the Cost of Source 1, # of Units and Cost of Unit.

NOTE Source 1 is always going to be HPRP Source 1. Source 2 is always going to be Check Number. Cost of Source 2 is going to be the actual check number.

Household members

To include household members in these services, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

*doe, jane

Multiple Services

Warning: Be sure to select the correct provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be reentered.

Provider: The Planning Council (#1)

Service List # of Services: Status: Identified Set All

of Services Service Rent Payment Assistance Provider Specific Service -Select-

Start Date 11/18/2009 03 : 03 PM End Date 11/18/2009 03 : 03 PM

HPRP Housing Relocation & Stabilization Service Provided -Select-

HPRP Financial Assistance Type Rental assistance

Source 1 HPRP Source 1 Cost of Service 1 1500

Source 2 -Select- Cost of Service 2

of Units Unit Type Months, Past Due Rent Cost of Unit 750

Status Identified Outcome Service Pending If Need Not Met, Reason -Select-

Cancel Clear

- If there are more services provided, click Add Another. If not, click Save and Exit.
- To edit a service, first click the Display Services button. If the Display Services button is not visible continue.
- Click the pencil next to the service you wish to edit.

Add Services

Multiple Services Add Need/Service

Display Options

Display All Display Services Display Shelter Stays Display Referrals

Select Dates -Select- Start Date: End Date: Show Date Range Clear Dates

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

	Need Date	Provider Creating	Need Type	Need Status
	11/18/2009	The Planning Council	Rent Payment Assistance	Identified

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

Display All Display Services Display Shelter Stays Display Referrals Add Need/Service

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.

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 this is a navigation bar with tabs: Home, ClientPoint (selected), ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, Help, and Logoff. The main content area is titled "Search Using Client ID." and contains a search form. The form has a "Scan or Enter Client ID" field with a "Search This ID" button and a "Delete This ID" button. Below this is a "Quick Call Information" section with a "Grant ROI for call" checkbox and a "Start Call" button with a "Start Quick Call" button. The "Search for Existing Client" section has a heading "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-fields. Below the input fields are search filter options: "Exact Match?" (unchecked), "Search only active clients?" (checked), "Search only inactive/deleted clients?" (unchecked), and "Search all clients?" (unchecked). At the bottom of the form is a "Search For Client" button. Three red callout boxes are present: one pointing to the "ClientPoint" tab, one pointing to the "First" and "Last" input fields, and one pointing to 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.