Norfolk ServicePoint

How-To Guide

ServicePoint 4.04

- HPRP ClientPoint -

Creating Client and Household Records For HPRP

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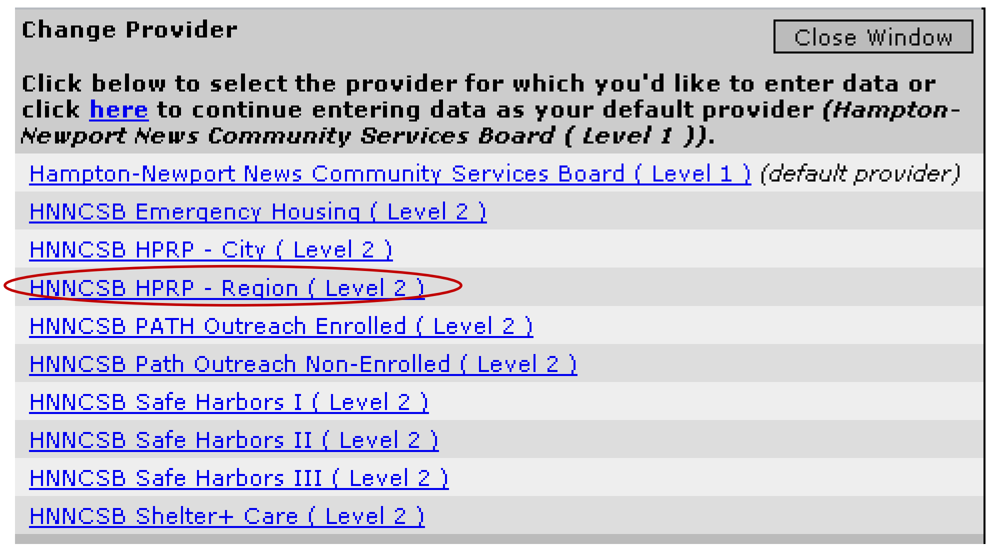
How-To

To get started entering HPRP clients

1. Click on **here** to change provider.

2. Select your HPRP program.



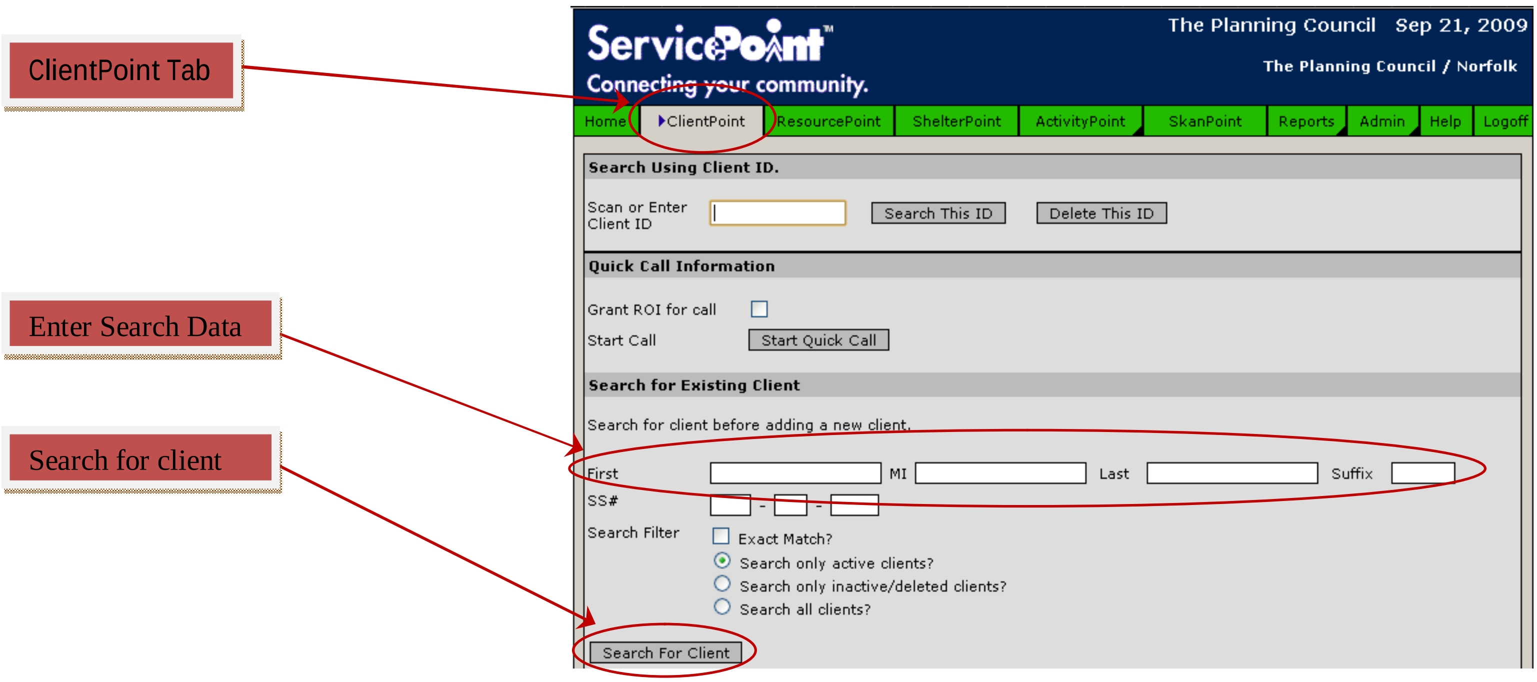
3. Now you are ready to start entering client for HPRP.
4. If you need to enter clients as normal, just click on the HPRP program and change back to your default provider.

How-To

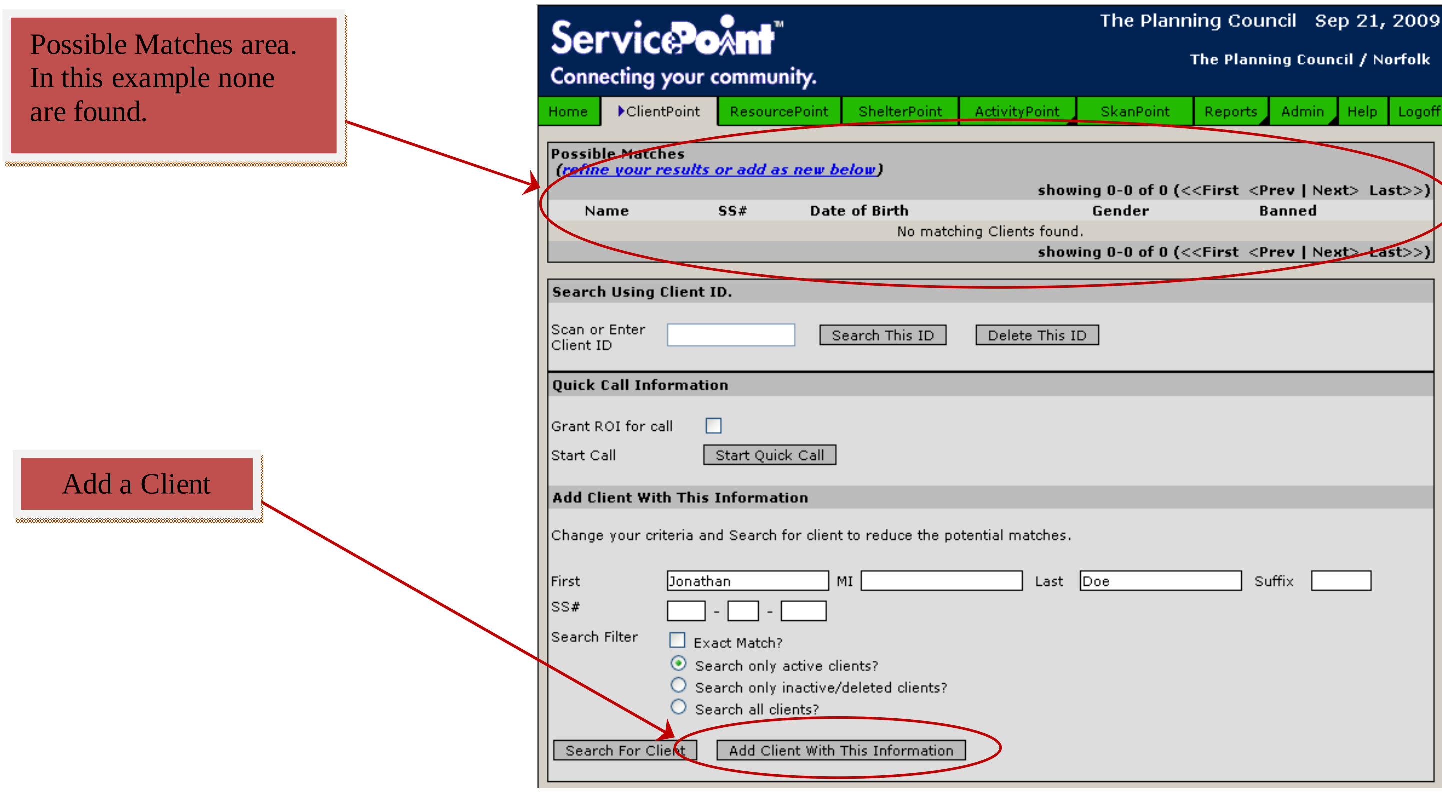
Create a client record

Record creation happens in the ClientPoint area of ServicePoint.

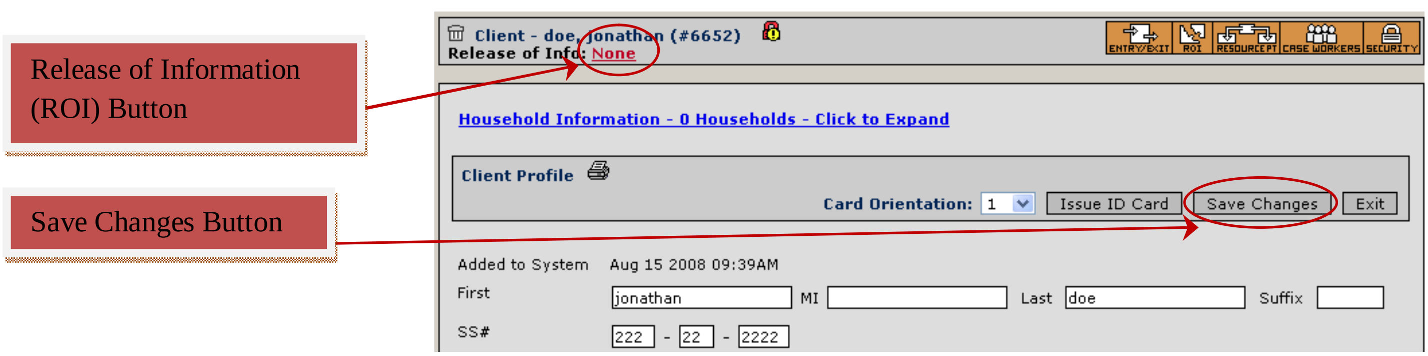
1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client. Click Search for Client. (Always run a search to see if the client is in the system.)



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 Release of Information (ROI) button.

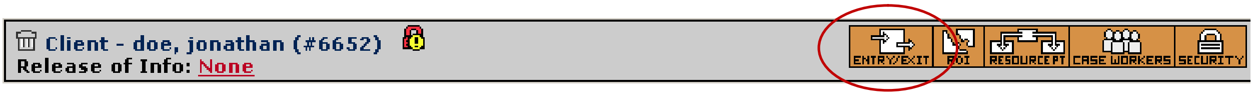


6. Fill in all the information.

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

7. Click Save Changes.

8. Click the Entry/Exit button.



9. Click Add Entry/Exit

10. 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.

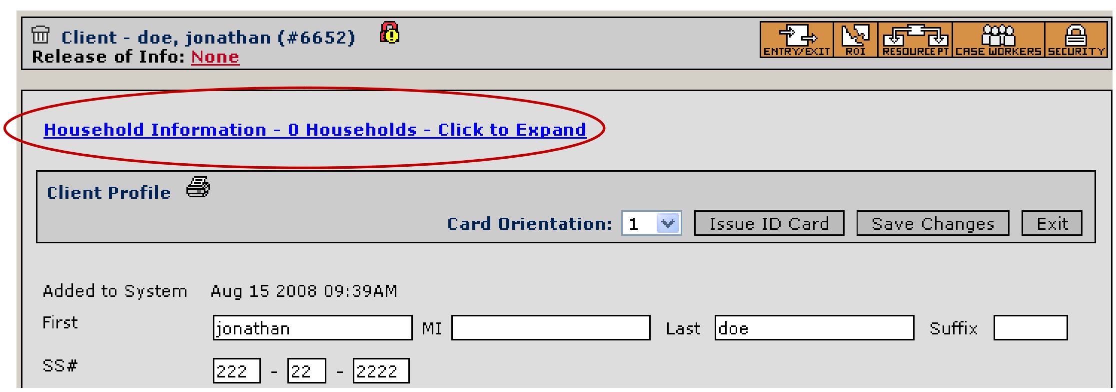
***NOTE* Required Univeral Data Elements** contains elements required by HUD that pertain to individual members of a household. This is completed for each person in a household and applied only to that individual.

11. Click the Close button.

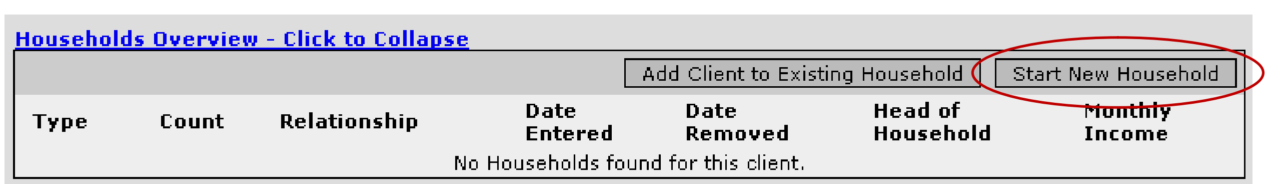
How-To

Create a client record with a household

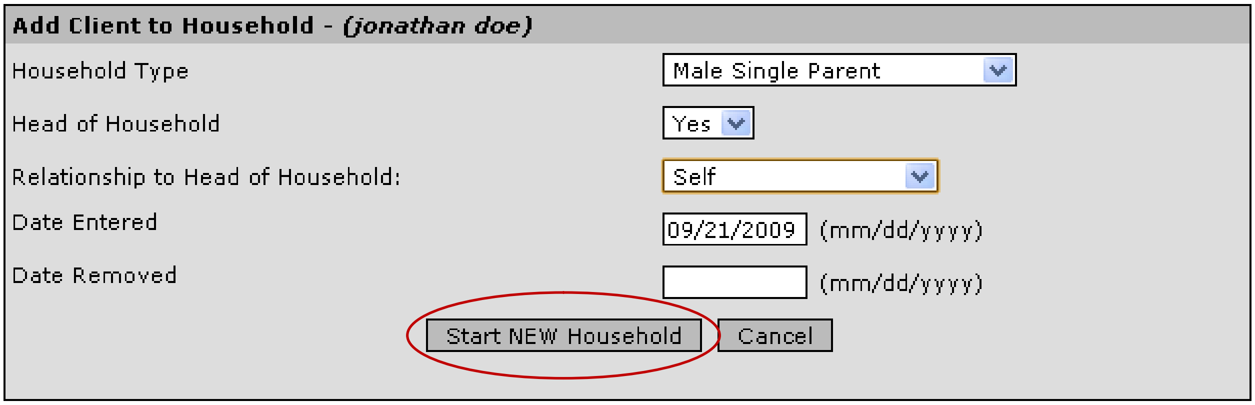
1. Search for or create the client record for the head of the household.
2. Click to expand the Household Overview section at the top of the screen



3. Click the Start New Household button.

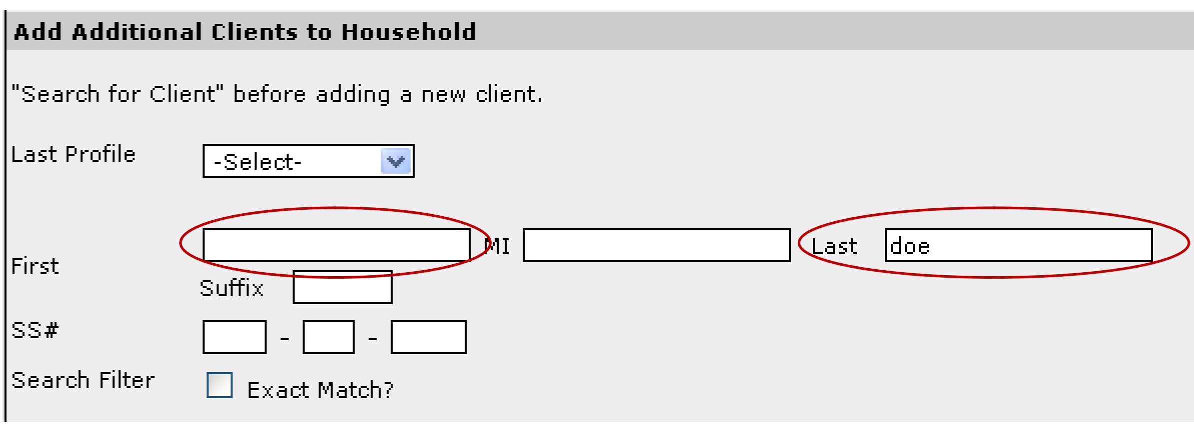


4. Complete the fields on this screen. Note whose record you are in when answering the Head of Household and Relationship to Head of Household questions. (The client is noted at the top of this screen.) Click Start NEW Household button.

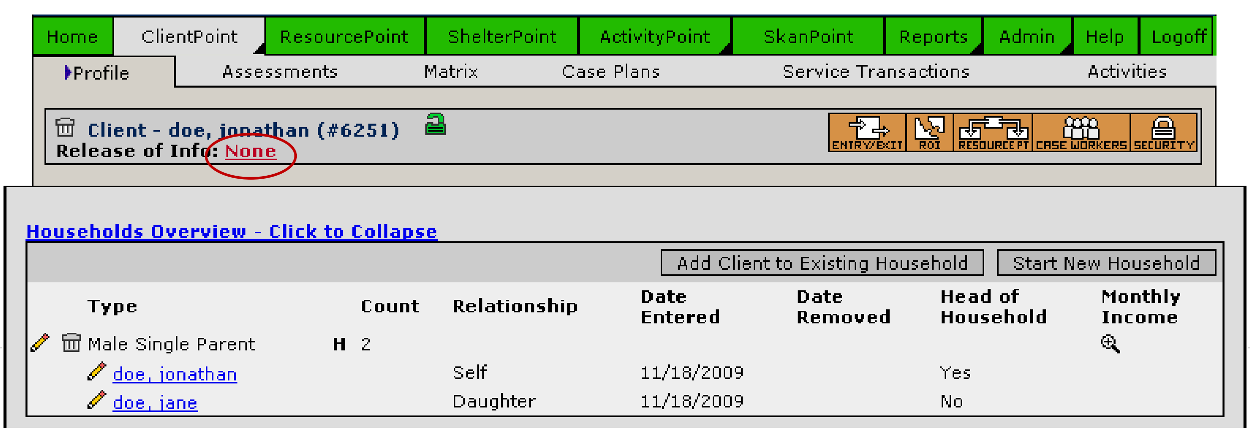


5. Answer the fields for the household member.

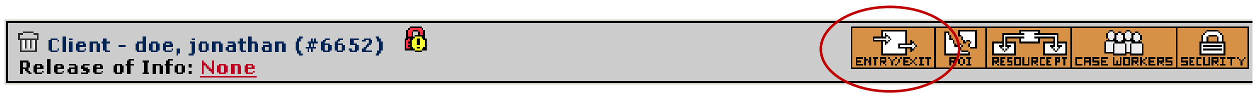
6. Add all members to the household by using the First and Last name fields. Then search for the client, if the client is not found, then add the client.



7. When all members have been added, click Exit & Refresh.
8. 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.

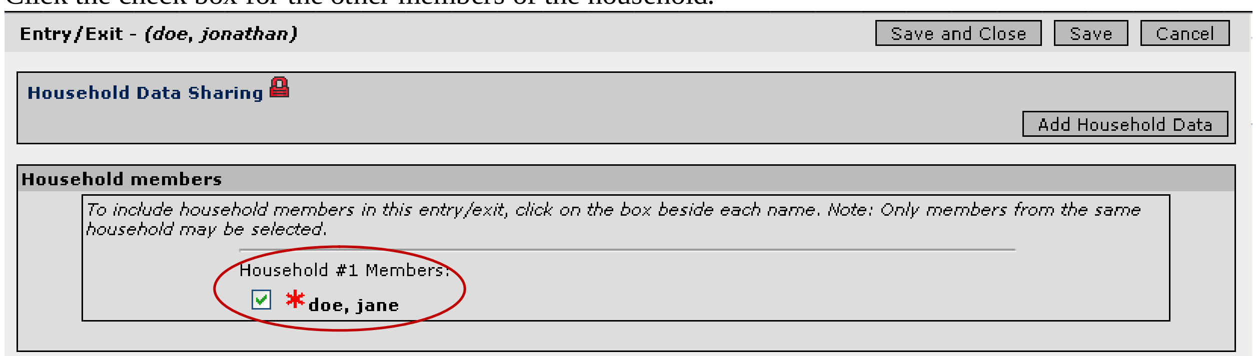


9. Click the Entry/Exit button.



10. Click Add Entry/Exit

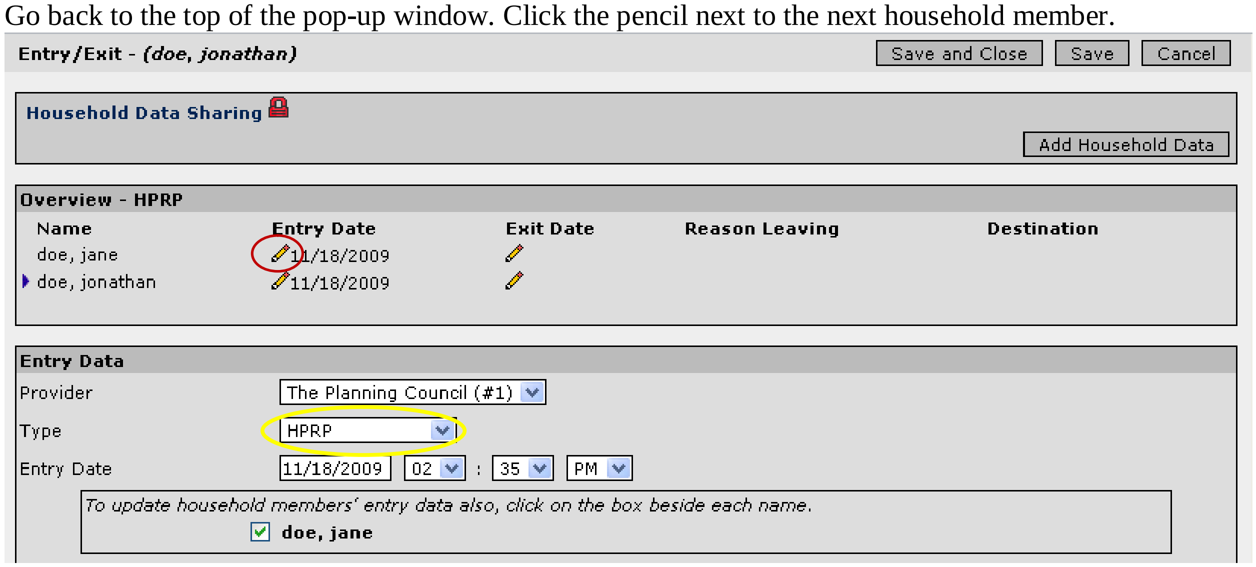
11. Click the check box for the other members of the household.



12. 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.

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

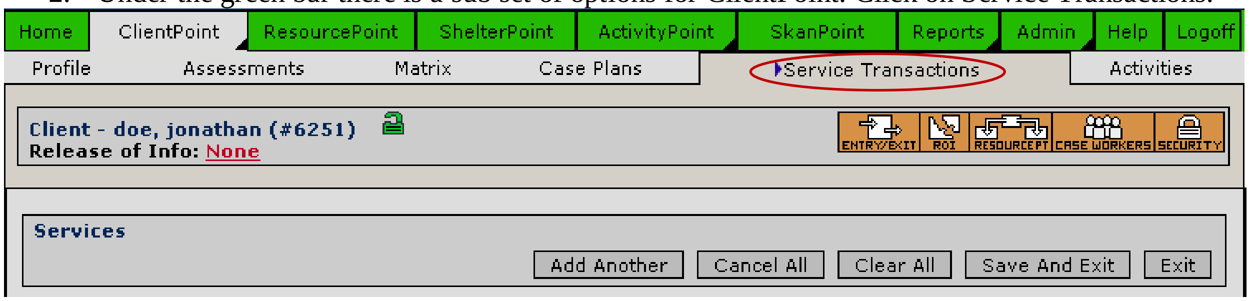


14. After the screen refreshes enter the Required Universal Data Elements for this client.
15. Repeat steps 12-14 for all members of the household.
16. After all members are completed click the Save and Close button.

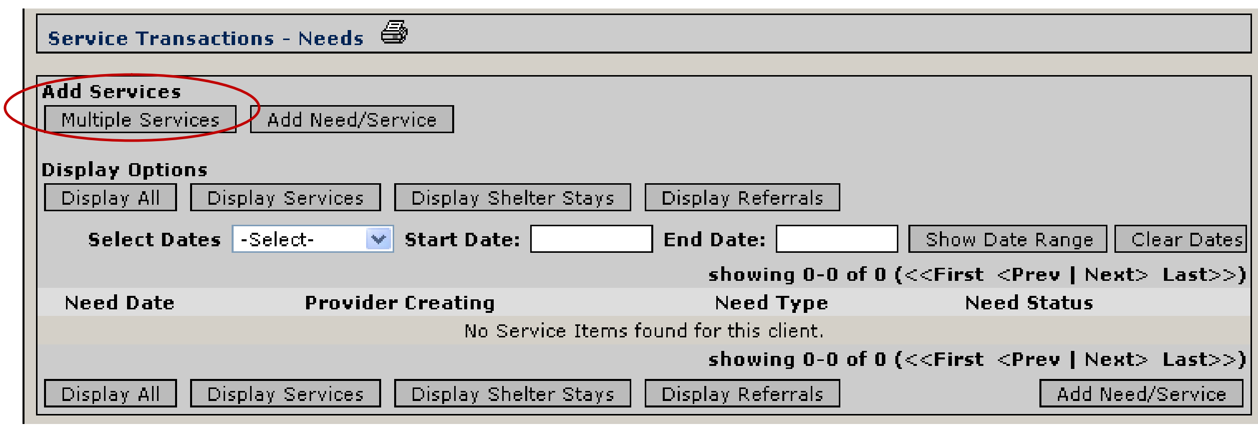
How-To

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.

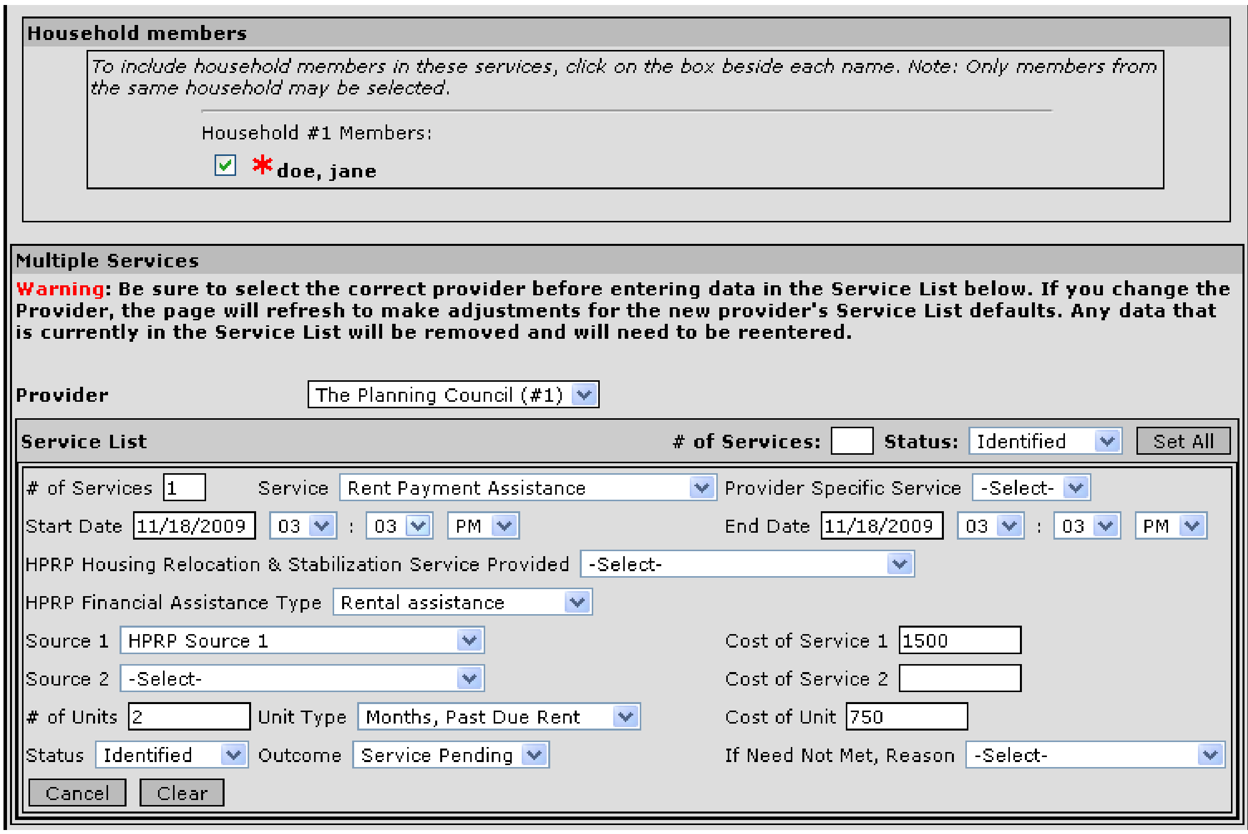


3. Under Add Services, click Multiple Services.

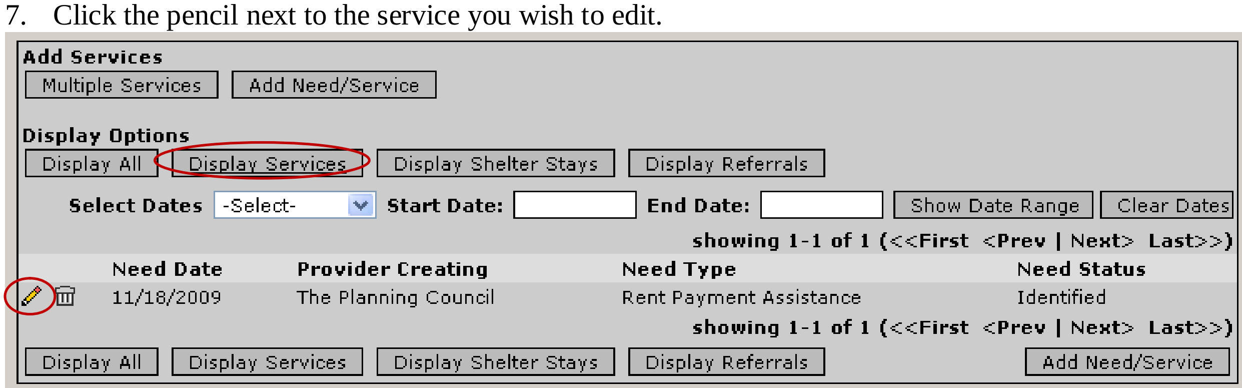


4. Answer all the drop down boxes and fill in the Cost of Source 1, # of Units and Cost of Unit.

   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.



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

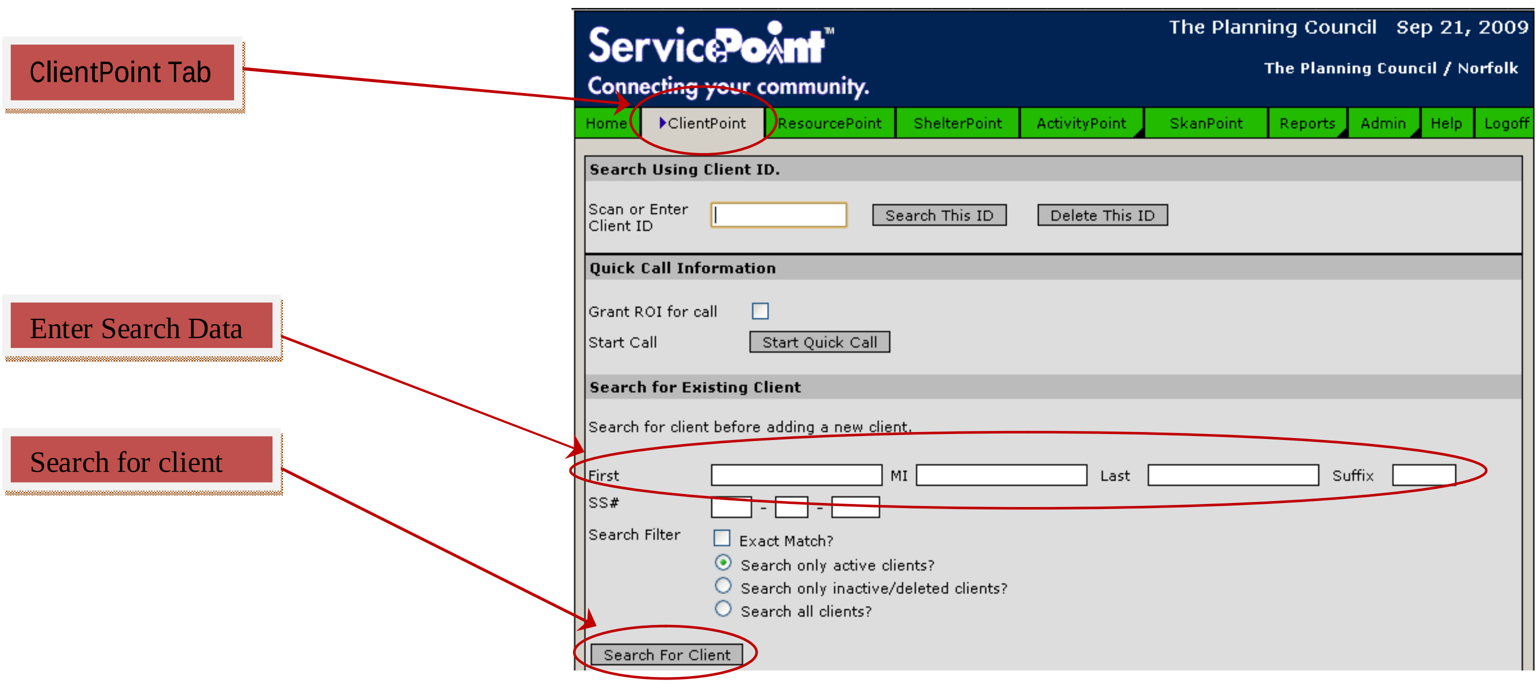


How-To

Search For and Update a Record

Updating records happens in the ClientPoint area of ServicePoint.

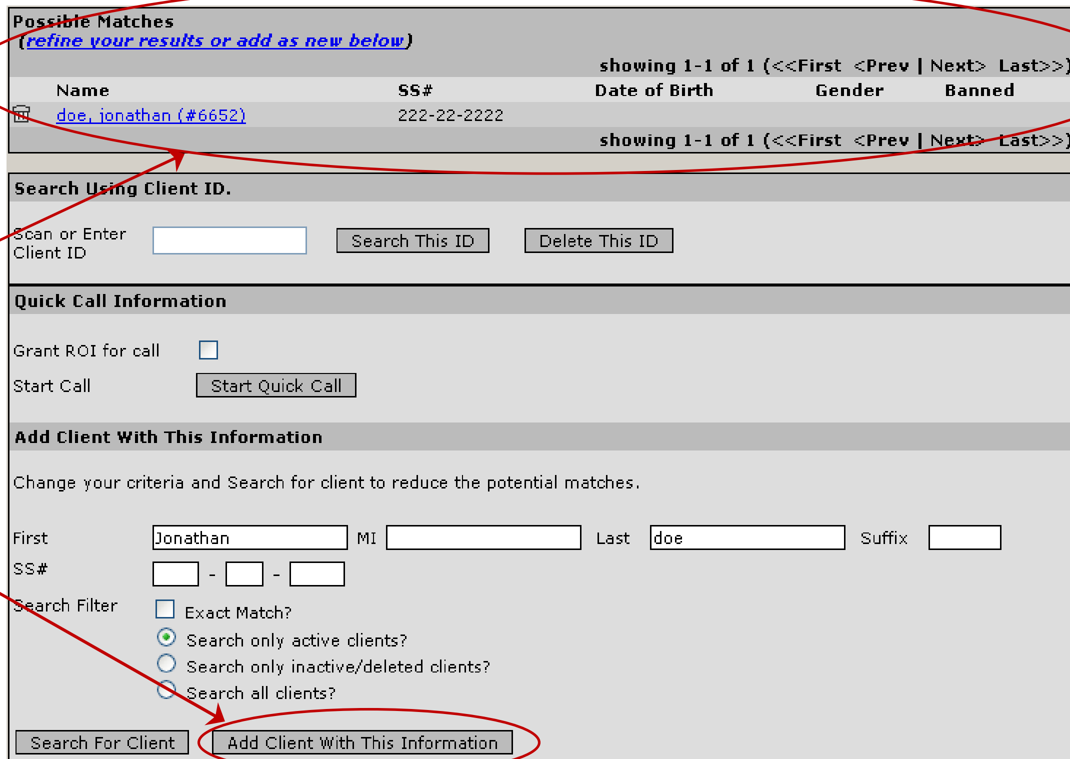
1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client (SS# is optional). The system only uses these three fields to search.



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 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.