



How-To Guide

ServicePoint 4.04
- ENTRY / EXIT – INDIVIDUALS -

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Individual Profile Set-up

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 this is a navigation bar with tabs: Home, ClientPoint (highlighted with a red circle), 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" input field, 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. The "Search for Existing Client" section includes the instruction "Search for client before adding a new client." and input fields for "First", "MI", "Last", and "Suffix". There are also "SS#" input 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?". A "Search For Client" button is at the bottom of the form, circled in red. Three red callout boxes on the left 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 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, Banned. It displays "No matching Clients found." and navigation links: "showing 0-0 of 0 (<<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 form 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)

- 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.

- Click the Close button.
- 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 Issue ID Card Save Changes Exit

Added to System Aug 15 2008 09:39AM
First jonathan MI Last doe Suffix
SS# 222 - 22 - 2222

- Fill in all the information. Click Save Release Info.

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

- Click Save Changes.

Entry/Exit - Exit

Create an Entry / Exit -- EXIT

- Click on the orange Entry/Exit tab located at the top right hand corner of the page.
- Click on the pencil beneath the Exit Date for the Entry/ Exit that needs to be closed out.

Entry/Exit (bill, dollar)				Add Entry/Exit	Close
Program	Type	Entry Date	Exit Date		
Test Program 1	Basic Entry/Exit	09/04/2009			

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

- Complete the Exit Data elements.

Exit Data

Exit Date: 09/25/2009 09 : 33 AM

Reason for Leaving: -Select-

If other, specify:

Destination: -Select-

If other, specify:

Notes:

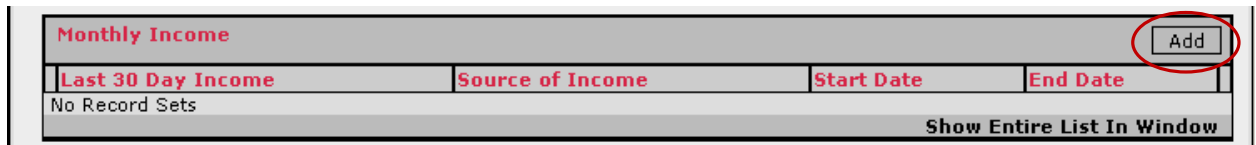
- Update any changes to Monthly Income or any other resources Sub-assessment and click Save and Close.

Sub-Assessment

Create a Sub-assessment – Adding a Source of Income

A *sub-assessment* is a type of response in ServicePoint that allows for more than one answer to a question. Sub-assessments appear as a separate window. Disability type, Income and a few other resources are sub-assessments.

1. Click the Add box in the far right-hand corner of the sub-assessment.



2. Complete the fields on the screen. Note that for an answer/income source to appear correctly in a HUD APR the answer/income start date must be on or before the Entry Date in the Entry/Exit.

The screenshot shows a form for a sub-assessment. At the top, it displays "Client Name: bill, dollar" and "Client ID: 343". Below this is the title "Monthly Income" with a printer icon. There are three buttons: "Save & Add Another", "Save & Exit", and "Exit". The form fields are as follows:

- Assessment Date:** 09/25/2009 09:29 AM
- Last 30 Day Income:** [Text input field] H G
- Source of Income:** [- Select -] [Dropdown arrow] H G
- Receiving Income Source?:** Yes [Dropdown arrow] H G
- Start Date:** 09/25/2009 (mm/dd/yyyy) H G
- End Date:** [Text input field] (mm/dd/yyyy) H G

At the bottom of the form, it repeats the client information: "Client Name: bill, dollar", "Client ID: 343", and "Monthly Income" with a printer icon. There are three buttons: "Save & Add Another", "Save & Exit", and "Exit".

3. If there are no other resources click Save & Exit if the individual has other income click Save & Add Another and fill out a new screen. Repeat until all sources of income have been recorded. Once you press Save & Exit it will take a couple of seconds to load the new screen.

Modifying a Sub-Assessment



Modify a Sub-assessment – Ending a Source of or an Amount of Income

Previous answers in sub-assessments should never be deleted or changed, they should only be closed out. There are two main reasons that sub-assessment answers need to be modified or closed-out:


- 1. When creating a new Entry/ Exit and there are answers in a sub-assessment that are no longer relevant or that are wrong. These old responses would need to be closed so that they will not appear in the HUD APR.*
- 2. While in your transitional program, you help a client increase the amount of money received from a particular funding source. For example if a household increases their monthly FoodShares allowance you would close out the old amount and create a new response for the new amount.*

1. In the event that an income source for an individual has changed or has ended, you will need to modify a sub-assessment answer or close out an answer. It is important to only modify and not delete answers that have become outdated, because previous answers to questions are important for historical reporting and may be used by other agencies.

Click on the pencil of the item that needs to be modified.

Monthly Income					Add
	Last 30 Day Income	Source of Income	Start Date	End Date	
		Earned Income (HUD)	09/04/2009		
Showing Rows 1-1 of 1					Show Entire List In Window

2. Enter an End Date in the End Date field. To remove a record so it does not appear in an APR the end date must precede the Entry Date. For example, if an individual had No Financial Resources listed in the income sub-assessment but actually was receiving some child support when entering the transitional program; you would need to enter an end date prior to the date for the Entry date.

Client Name: bill, dollar
Client ID: 343
Monthly Income 

Save & Add Another Save & Exit Exit

Assessment Date 09/25/2009 10:03 AM


Last 30 Day Income H G

Source of Income H G

Receiving Income Source? Yes H G

Start Date (mm/dd/yyyy) H G

End Date (mm/dd/yyyy) H G

Client Name: bill, dollar
Client ID: 343
Monthly Income 

Save & Add Another Save & Exit Exit

3. Click Save & Exit.

Important Notes on Income and other resources Sub-Assessments:

1. It does not matter how dollar values are entered. For no income leave the amount space blank.
2. The system will add Entry information for all items that A) has a Start Date on or before the HUD Entry Date; B) has an END Date that is null or after HUD Entry date.
3. The system will add Exit information for all items that A) have Start Date on or before the HUD exit date; B) does not have an end date on or before the HUD exit date or has an end date that is null and; 3) monthly income added at exit does not require an end date to be pulled into the HUD-40118 APR.
4. Income sources map to HUD APR destination categories in a particular way. Use the **Mapping APR Elements** section to ensure that data is entered correctly in the various fields so that it will come out correctly in the APR.

Service Transactions

Enter a Service Transaction

For every individual that receives a supportive or essential service that is paid for out of Transitional Housing Program (THP) funding, there needs to be a record of that service in the Service Transaction section in WISP.

1. Click on the Service Transaction tab.



2. Click on Add Need/Service.

ServicePoint™ Connecting your community. ServicePoint Norfolk Homeless Consortium Training Site Sep 25, 2009 ShelterLink Test Agency / Norfolk

Home ClientPoint ResourcePoint ShelterPoint ActivityPoint SkanPoint Reports Admin Help Logoff

Profile Assessments Matrix Case Plans Service Transactions Activities

Client - bill, dollar (#343) Release of Info: None

Household Information - 0 Households - Click to Expand

Service Transactions

Add Services

Display Options

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
09/21/2009	ShelterLink Test Agency	Emergency Shelter	Closed

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

3. Answer all the Service Transaction elements:
 - a. **Service** Make sure that all service for which you have received funding are available and selected.
 - b. **Start Date** Make sure the date is on or after the Entry Date in the Entry/Exit.
 - c. **Source 1** Select the fund source that is providing the funding for this activity. For THP activities, select **THP2008**.

Need / Service Transaction

Date Set 09/25/2009 10 : 46 AM

Provider ShelterLink Test Agency (#55)

Need / Diagnosis

-Select Need from Quicklist- -or- [lookup](#)

Need

Financial Amount Notes about Need

Service

Service Provider ShelterLink Test Agency (#55)

Start Date 09/25/2009 10 : 46 AM End Date : :

Provider-specific Service -Select- Service Notes

-Select Service from Quicklist- -or- [lookup](#) -or- [Same As Need](#)

Service Type

Source 1 -Select- Cost Of Service 1

Source 2 -Select- Cost Of Service 2


of Units Unit Type -Select- Cost of Units

Service Followup Date Actual Followup Date Followup Made -Select-

4. Click Save and Exit.


Close Out a Service Transaction

1. Click on the Service Transaction Tab and click on the Display All button. The default view of service records only provides access to the need. In order to see the service component of the transactions. The Display All button lets you see the need the service.

Client - bill, dollar (#343) 
 Release of Info: **None**

ENTRY/EXIT ROY RESOURCPT CASE WORKERS SECURITY

[Household Information - 0 Households - Click to Expand](#)





Service Transactions - Needs 

Add Services

Display Options

Select Dates: Start Date: End Date:

showing 1-2 of 2 (<<First <Prev | Next> Last>>)

	Need Date	Provider Creating	Need Type	Need Status
 	09/28/2009	ShelterLink Test Agency	Transportation	In Progress
 	09/21/2009	ShelterLink Test Agency	Emergency Shelter	Closed

showing 1-2 of 2 (<<First <Prev | Next> Last>>)

2. Click on the pencil next to the Service record that needs to be closed.
3. Enter the end date for the service transaction.
4. Change the status of the transaction to reflect the outcome.
5. Click Save.

Release of Info: None

Service Transaction - Edit Need/Service

Save Save and Add Another Service Cancel Clear Fields

Overview - # Clients: 1

Name	Date Set	Created By	Need Type	Status	Outcome
bill_dollar	09/28/2009	ShelterLink Test Agency	Transportation	In Progress	Service Pending

Need / Service Transaction

Date Set 09/28/2009 08 : 14 AM

Provider ShelterLink Test Agency (#55)

Need / Diagnosis

-Select Need from Quicklist- -or- lookup

Transportation

BT

Need

Financial Amount Notes about Need

Service

Service Provider ShelterLink Test Agency (#55)

Start Date 09/28/2009 08 : 20 AM End Date

Provider-specific Service -Select- Service Notes

-Select Service from Quicklist- -or- lookup -or- Same As Need

Service Type Transportation

BT

Source 1 -Select- Cost Of Service 1

Source 2 -Select- Cost Of Service 2

of Units Unit Type -Select- Cost of Units

Service Followup Date Actual Followup Date Followup Made -Select-

Referral

Referral Date 09/28/2009

Check this box to notify ServicePoint Providers by Email.

Refer To

Provider #1 -Select- -or- lookup , bed avail

Provider #2 -Select- -or- lookup , bed avail

Provider #3 -Select- -or- lookup , bed avail

Provider #4 -Select- -or- lookup , bed avail

Provider #5 -Select- -or- lookup , bed avail

Projected Followup Date

Status and Outcome

Status In Progress Outcome Service Pending If Not Met, Reason -Select-

No Household members are included in this Need/Service.

Service Transaction - Edit Need/Service

Save Save and Add Another Service Cancel Clear Fields

Exiting a client

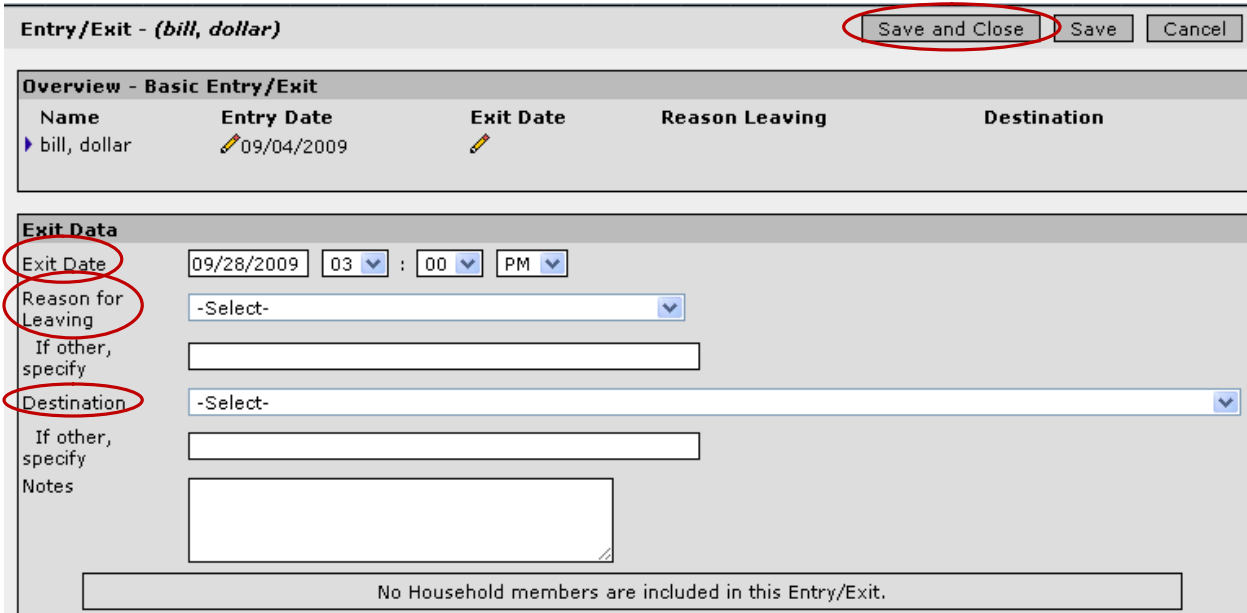
1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client. Click Search for Client.
3. If client is listed under Possible Matches, click the client's name to proceed to the client's record.
4. Click on the Entry/Exit button.



5. Click on the Pencil under Exit Date.



6. Fill out the Exit Data, including Exit Date, Reason for Leaving, and Destination. The rest of the data should already be entered.



7. Click Save and Close.