

ServicePoint QuickReference Card

Connecting to ServicePoint

1. Double click on the browser icon (Internet Explorer or Firefox) on your desktop.
2. In the address bar, enter the URL for your site:
https://_____
3. Type in your User name. (The user name will not change.)
4. Type in your Password. On first login, you enter a temporary password. ServicePoint immediately prompts you to change it. Create a password between 8-16 characters, and include at least two numbers. Passwords are case-sensitive. Every 45 days ServicePoint prompts you to change your password.
5. Click Logon or press Enter.

Notes:

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Client Intake – Locating/Creating Profile

Creating a Client and Entering Information

1. Click the green ClientPoint tab or click ClientPoint in the Navigation box.
2. Type in client information in the First, MI (middle initial), Last name, SS#, and SSN Data Quality fields.
3. Click Add/Find Client to continue.
4. If a matching record exists, click on the client name to open the existing record.
5. If no records match, click Refine Search Criteria to search again or enter client information in Date of Birth, Gender, Race, and Ethnicity fields.
6. Click Add Client with This Information.
7. Click OK.



Dates must be entered as 4 digits – “2006”, not “06”.

Entering Additional Client Information

1. From ClientPoint, with client record open, select Assessments tab.
2. Select an Assessment from the green list on the left side of the screen to display more questions.
3. Answer appropriate questions for as many assessments as you need for client.
4. Click Save Changes.
5. Click Exit.

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Temporary/Reset ServicePoint Password Information

Notes:

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Agency/Program-Specific Notes:

Use this area to record helpful hints for yourself, and any additional program-specific notes regarding how to enter/create a new Client Profile (named vs. unnamed) and when/which additional assessment data elements must be collected.

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Creating a Household

1. Create a client record or open an existing client record.
2. Click Add This Client to Household near the bottom of the Client Profile screen.
3. In Household Type field, select option for your client.
4. In Head of Household field, select Yes or No.
5. In Relationship to Head of Household select option that describes the client.
6. Date Entered field automatically populates with today's date.
7. Click Start NEW Household to create a household containing your client.
8. To add other clients to household, fill in Add Additional Clients to Household portion of screen.
9. Click Add/Find Client to see if client is already in ServicePoint. If so, click on client name. If not, click Add Client with This Information to create a client record.
10. Continue with steps 4-6 above to complete information on new household member.
11. Continue to add other clients to household in same manner.
12. Click Exit when finished adding household members.

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Adding a Client to an Existing Household

1. Open a client record.
2. Click Add This Client to Household near the bottom of the Client Profile screen.
3. Click Add to EXISTING Household button at the bottom of the popup box.
4. In the popup window, type in first and last name of client who is already part of a household. Click Search.
5. Select client from list of possible matches.
6. Click add under household Type. Popup displays with name of client to be added on form.
7. Select options for Head of Household and Relationship to Head of Household fields.
8. Click Add Household Member.
9. Add additional household members as necessary.

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Cautionary Reminders

When adding an entirely new household (with all new ServicePoint clients) to the system, begin by first entering the Head-of-Household's data (i.e. **create the HH's client profile first**). On this initial client profile, set-up the household under "Household Information" to maximize the efficiency of (and helpful features contained within) the ServicePoint version 4.04 software.

*** In ServicePoint version 4.04, LAST NAME, RACE, ETHNICITY, and HEAD-OF-HOUSEHOLD STATUS will automatically transfer to all new household members, but data element answers can easily be edited as needed. ***

Creating/starting new client profiles via the “Create New Household” function, requires the ServicePoint User to revisit each new client’s profile to ensure that all necessary demographic (and other related assessment) data elements are completed & date-stamped at the time of initial client profile creation. If forgotten, ServicePoint Users should locate each of the household members’ client profiles, answer the required demographic/assessment data element questions via BACKDATE MODE, and save the information to ensure that an accurate description of each client is captured at the time of entry into the ServicePoint database.

*** Additional information pertaining to the use of **"BACKDATE MODE"** within ServicePoint can be found on the corresponding **QuickReference Card**.

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Agency/Program-Specific Notes:

Use this area to record helpful hints for yourself, and any additional program-specific notes regarding how to enter/create a new Client Profile (inside or outside of the Create New Household feature) and when/which additional assessment data elements must be collected.

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Program Entry, HUD-40118 APR

1. Click the orange Entry/Exit button at the top of the client record.
2. Click Add Entry/Exit. Select other household members, as appropriate, to create an Entry/Exit for them at the same time.
3. Select Provider if other than your default provider.
4. Select type of entry consistent with your provider's reporting requirements. Select HUD-40118 or PATH if client information must feed into one of those reports. Basic and Standard entry/exit may be used for other non-homeless reporting.
5. Enter entry date and time if different from today's date and time.
6. Complete other assessment information if desired.
7. Click Save.
8. Repeat steps above to create another entry/exit for client.
9. Click Save and Close.
10. Click Close.

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Exiting a Client from a Program

1. Open a client record.
2. Click the orange Entry/Exit button at the top of the client record.
3. Click the Edit icon (pencil) next to Exit Date for the program from which you wish to exit the client.
4. Exit Date and time populate with today's date. Change them if necessary.
5. Select from drop-down list for Reason for Leaving field.
6. Fill in If Other, specify field as needed.
7. Choose from drop-down list for Tenure field.
8. Choose from drop-down list for Subsidy field.
9. Add notes if necessary.
10. Choose other household members to create exit if desired.
11. Click Save and Close.

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Agency/Program-Specific Notes:

Use this area to record helpful hints for yourself, and any additional program-specific notes regarding how to add a new Entry/Exit record to a Client's ServicePoint profile. Be sure to list the criteria for choosing a specific Entry/Exit TYPE, and when/which additional assessment data elements must be collected in conjunction with a chosen Entry/Exit TYPE.

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Backdating Information

1. Open an assessment for a client.
2. At the top of the assessment, select the date field.
3. Enter a new date. Enter a new time if desired.
4. Click the Back Date button.
5. The popup window asks if you want to switch to Back Date mode. Click OK to continue.
6. When screen refreshes, the banners are yellow to alert you that you are in back date mode.
7. Complete assessment fields.
8. Click Save Changes.
9. Click Return to Live Mode hyperlink to return to current data entry.
10. At the prompt, click OK to return to live mode. Your screen returns to the normal colors.



Be sure to set the proper date before you click Back Date. The yellow title bars remind you that you are in back date mode.

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Providing a Service

1. Open a client record. Click on Service Transactions tab in ClientPoint.
2. In the Service Transaction – Add a New Need/Service screen, click Enter Multiple Services.
3. Select provider, if other than the default provider.
4. Enter Service Start Date and time if other than the default.
5. Enter date and time in Service End Date field.
6. In Service List, enter quantity and select status for appropriate items. If all services have same quantity and status, enter information at top of list and click Set All.
7. Click Save Changes.

Viewing Past Needs/Services

1. From the Service Transactions tab in ClientPoint, click View Past Needs/Services to see a list of all service transactions.
2. To view or edit any item, click the Edit icon (pencil) next to the item.
3. View or edit the information.
4. Click Save Changes.
5. Click Exit to return to the main Service Transactions screen.

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Agency/Program-Specific Notes:

Use this area to record helpful hints for yourself, and any additional program-specific notes regarding how to use the BACKDATE function within ServicePoint, and/or the use of recording SERVICE TRANSACTIONS within clients' profiles (i.e. if all help given to clients is recorded as a Service Transaction, if only certain items/services are recorded as Service Transactions, or if all help is recorded via an official ENTRY/EXIT RECORD with casenotes). This information should be obtained from your Agency Administrator(s) and/or System Administrator(s).

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ShelterPoint

Viewing Bedlist

1. Click the green ShelterPoint tab or click ShelterPoint from the Navigate box on the Home page.
2. In the View Bedlists for Provider field, select a provider from the drop-down list and click Submit.
3. In the View Information for Bedlist field, select a bedlist from the drop-down list and click Submit.

Reserving a Bed

1. Click Add Reservation button.
2. Use the popup window to search for or add a new client. You can also scan the client ID or type in the client's ID number. If you enter some information and click Continue With This Reservation, you can select from possible matches, add client with this information or refine your search.
3. In the Reserve Date text box, change the date if you do not want to use today's date.
4. To make reservations for household members, click the checkbox next to each member's name.
5. Click Save & Continue.

Holding a Bed

1. Click on Hold next to the bed you want to hold.
2. Select all beds by clicking All in the Hold column.
3. To clear the hold, click Held.

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Checking in Clients with a Reservation

1. In the Reservations for Bedlist section, click checkin next to the name of the client you want to check in to the shelter.
2. At the Reservation Checkin – Bed Stay Data window, click Assign Bed to select an available bed for the client. You must select from the list; you will not be able to type in a bed name. The ID number fills in for you.
3. Complete the other fields as appropriate. Click Save when finished or Cancel if you do not want to save the bed assignment.

Checking in Clients without a Reservation

1. Click EMPTY next to the bed you want to assign. If no beds are empty, click EMPTY next to Overflow. The Check In Client screen opens.
2. Select a client from the Last Profile drop-down box or fill in client name or ID to search for an existing client.
3. Select client from possible matches and click Continue with Check In. The Bed Stay Data window opens for you to enter information about the client. Change the date at the top if you need other than today's date for the check in date.
4. Check boxes next to household members to check them in to beds at the same time as the client.
5. On the Bed Stay window you can also provide services for the client. Enter the quantity and status for selected services, or enter quantity and status at the top of the list. Click Set All to mark all services in the list. (The services section appears only when checking in clients without reservations.)
6. Click Save & Continue.

Confirming an Individual Client

1. On the ShelterPoint main page, select a provider and bedlist.
2. Click on name of client to confirm.
3. In Bed Stay Data pop-up window answer Yes to Confirmed for Next Day Stay? question.
4. Click Save to continue with this window. Click Save & Exit to return to bedlist.

Confirming Clients Using Confirmation List

1. On the ShelterPoint main page, select a provider and bedlist.
2. With the desired bedlist displayed, click Update Confirmation List at the bottom of the list.
3. Click the box next to each client you want to confirm.
4. Click Save.

Checking Out Clients Individually

1. On the ShelterPoint main page, select a provider and bedlist.
2. Click on name of client to check out.
3. In the Bed Stay Data pop-up window, enter date and time in Date Out field.
4. Complete other fields as appropriate.
5. Click Save to save changes and continue working with the pop-up window. Click Save & Exit to save changes and return to the main ShelterPoint window.

Checking Out Clients with Transmit List

1. On the ShelterPoint main page, select a provider and bedlist.
2. Click Transmit Today's Checkout List at the bottom of the bedlist.
3. Select the box next to each client checking out, or click Check/Uncheck all Clients with current checkouts to select the whole list.
4. Individually enter or change the Date Out, Time Out and Supplies Returned? fields. To set the same checkout date and time for all clients, enter the date and time above the list in the Current Checkout Date fields and click Set Dates.
5. Click Check Out.

Notes:

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SkanPoint

Entering Services via SkanPoint

1. Click the green SkanPoint tab.
2. Select a provider.
3. Select a service from the quicklist or use lookup and the taxonomies to enter a service.
4. Change the Service Start Date and time if different than the default that fills in automatically.
5. Enter Service End Date as appropriate.
6. Select a provider specific service from the drop-down list.
7. Enter information in Cost of Service and Service Notes if necessary.
8. Click on Start Skan to begin a list of clients, either by using a hand scanner or typing in client ID numbers in the Skan Code field and clicking on Skan Bar code.
9. If you enter a name in error, you can correct it by clicking Remove Last Entry.
10. Click Exit to end the list.
11. Click New Session to clear the service data and begin a new list.

Viewing Services via SkanPoint

1. Click the green ClientPoint tab or select ClientPoint from the Navigate box.
2. Open a client record.
3. Click the Service Transactions tab under Client Profile.
4. Click View Past Needs/Services button to display a list of all past service transactions.
5. Click the Edit icon (pencil) to view or edit the service transaction details.
6. Click on the trash can to delete a service.

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Creating a Stand-Alone Client List

1. Click on the green SkanPoint tab.
2. Scroll to the Manage Clients in Clients List section of the screen.
3. To edit a list of clients, click on Manage Client List.
4. Select a client by clicking on the name.
5. In the pop-up window you can delete a client by clicking the trashcan next to the name.
6. At the bottom of the screen you can add a client to a list.
7. To create a new client list, enter a name in the Enter List Name field.
8. Click Create Client List.
9. Enter names to populate the client list or enter the client ID number.
10. You can also use the lookup feature to search for a client by First Name, Last Name, Client ID or Social Security number. Click Add New Client to List.
11. Click Exit when finished.

Notes:

Creating a Client ID Card (with or without a photo)

1. Click the green ClientPoint tab or click ClientPoint in the Navigate box.
2. Open a client record by entering name and clicking Add/Find Client or entering client ID number.
3. If you want to print a photo on the ID card, check the File Attachments section of the client record to see if a photo has been attached. Photos must be .jpeg or .jpg format files, and the description must contain the words “photo” and “client”.
4. In the Client Profile banner, use the drop-down box to select the card orientation for the ID card – the print position on a sheet of 10 cards – and click Issue ID card.
5. Review the PDF file for ID card accuracy.
6. To print, load labels or other cardstock in the printer and click the Print icon on the Adobe Acrobat Reader toolbar.

Notes:

Creating Bulk ID Cards

1. Click the green SkanPoint tab.
2. Scroll down to the Generate Bulk ID Card section.
3. To print ID cards for the entire database, click Generate Bulk ID Cards.
4. The pop-up box asks if you really want to print cards for everyone in ServicePoint. If so, click OK.
5. Review the file of ID cards. If OK, click the Print icon in Adobe Acrobat Reader. (Note: Be sure you have loaded the ID card paper or labels in the printer before clicking the Print icon.)
6. To print ID cards for a specific client list, click Generate ID Cards from Client List. (Note: Be sure you have loaded the ID card paper or labels in the printer before clicking OK on the next screen.)
7. Select a list.
8. Select names from the list by clicking in the box in front of the name. (There is a box that will check or uncheck all the names in the list.)
9. Click Print ID Cards for Clients.
10. Review the file of ID cards. If OK, click the Print icon in Adobe Acrobat Reader. (Note: Be sure you have loaded the ID card paper or labels in the printer before clicking the Print icon.)

Notes:
