



# SERVICEPOINT v5.2

## EXISTING ADMINISTRATORS' SYSTEM HIGHLIGHTS FOR SOFTWARE UPGRADES

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# SERVICEPOINT 5.2 UPGRADE HIGHLIGHTS

The *5.x Major ServicePoint release* is designed to both replicate and enhance the functionality of current *ServicePoint* versions and established implementations' user experiences. This guide will highlight some of the major changes with which the existing users should become familiar prior to upgrading to *ServicePoint* version 5.2 or higher.

- ✦ Design
- ✦ Home Screen
- ✦ Navigation
- ✦ *ClientPoint*
- ✦ *ShelterPoint*
- ✦ Admin Providers
- ✦ System Preferences
- ✦ User Admin
- ✦ Provider Groups
- ✦ Provider Profile (information for ResourcePoint)
- ✦ Assessment Administration
- ✦ License Administration and allocation
- ✦ System Preferences

# SERVICEPOINT 5.2 OVERVIEW

*ServicePoint* is divided into several modules. Each module has a different function within *ServicePoint*, but all work together to form a comprehensive client management system.

## 5.2 DESIGN

You'll notice that *ServicePoint* has a new look, beginning with the login screen. (See Figure 1-1)

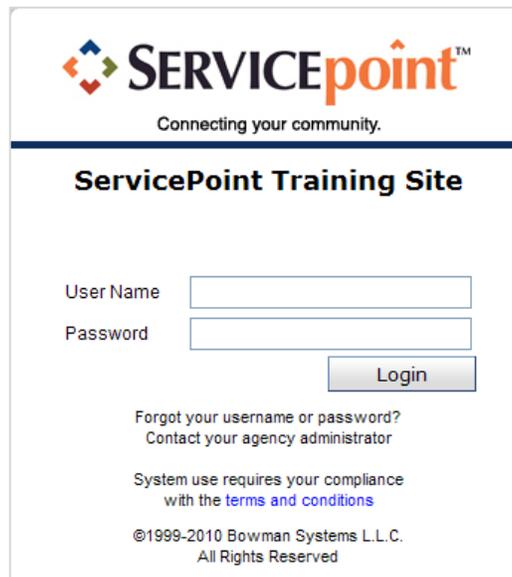


Figure 1-1

### 5.2 Color and Logo

Each Module of *ServicePoint* is identified with a unique color and logo. The vibrantly colored header will remain visible for the user while moving around within a module. (See Figure 1-2)

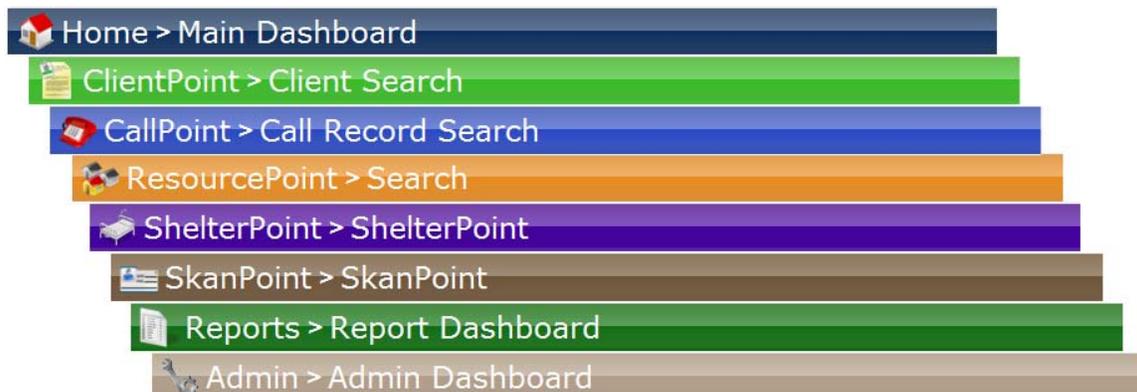


Figure 1-2

In addition, the navigation path is listed (in text "breadcrumbs") within each header. (See Figure 1-3)



Figure 1-3

A **Continue Session** option has been added so that users can choose to logoff at timeout or continue the session. This will assist users in utilizing *ServicePoint* as a live application. (See Figure 1-4)

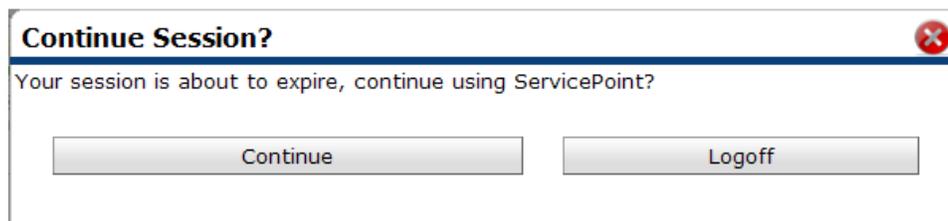


Figure 1-4

## 5.2 HOME SCREEN

The **Home** screen is the first screen you see after logging into *ServicePoint*. (See Figure 1-5)

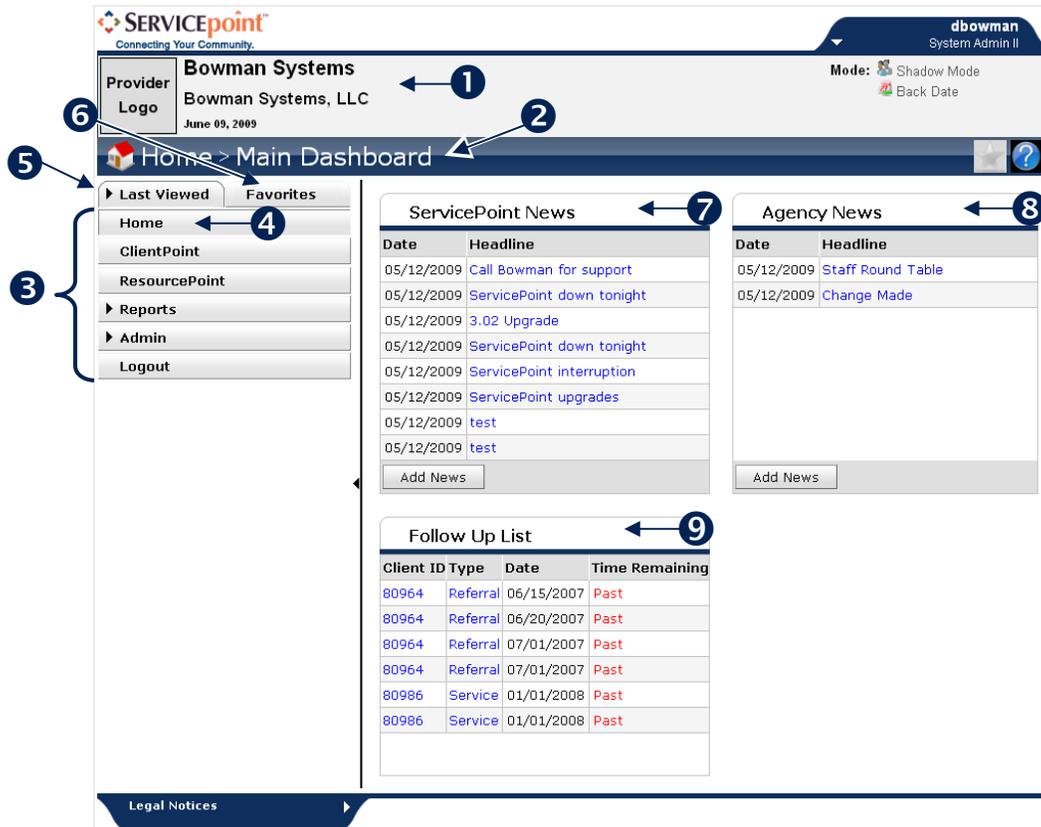


Figure 1-5

The top left hand side of this screen (1) indicates the name of your *ServicePoint* installation, the current date, and the name of your provider. Administrators can offer agency visibility by uploading the provider logo to the Provider Admin profile. The image will change based on the provider where a user is attached.

Below this is a colored heading that indicates the module you are viewing. In this case, the Home>Main Dashboard. (2)

Below this are a series of tabs in a navigation box. (3) Which tabs appear on your screen depends on the settings established by the administrator who set up your account. Each of these tabs is a link to one of the various modules of *ServicePoint*. When you click one of these tabs it is like pressing a button and becomes depressed, indicating that you are viewing that tab. (4) For example, the *Home* tab in the figure above is selected, which indicates you are viewing the **Home** screen.

Arrows next to a tab, such as in Reports and Admin, indicate that the tab expands to show additional sub-sections.

There are two ways to look at the tabs, as Last Viewed (5) or as a list of Favorites. (6)

To the right of the navigation box are the **ServicePoint News** box, (7), the **Agency News** box, (8), and the **Follow Up List** box. (9) System Administrators can post news for every agency in this *ServicePoint* installation here or for a specific agency. Click the **Full Story** links to read more about a message posted here.

The **Follow Up List** box includes a list of clients who have projected follow-up dates noted in their file.

## 5.2 Navigation

*ServicePoint* is designed to allow navigation within the application as well as with the browser navigation, such as the Back and Forward arrows. Each tab or link you click will direct you to the next screen and also provide buttons to return you to the previous screen. (See Figure 1-6)

*Note:* Clicking the Refresh button on your browser will log you out of your session.

The screenshot shows the ServicePoint Main Dashboard for Bowman Systems, LLC. The dashboard is divided into several sections:

- Navigation Menu (Left):** Includes links for Home, ClientPoint, ResourcePoint, Reports, Admin, and Logout. A red circle with the number '1' points to the 'ClientPoint' link.
- ServicePoint News (Top Middle):** A table with columns 'Date' and 'Headline'. It lists several news items from 05/12/2009, including 'Call Bowman for support', 'ServicePoint down tonight', '3.02 Upgrade', 'ServicePoint down tonight', 'ServicePoint interruption', 'ServicePoint upgrades', and 'test'.
- Agency News (Top Right):** A table with columns 'Date' and 'Headline'. It lists two news items from 05/12/2009: 'Staff Round Table' and 'Change Made'.
- Follow Up List (Bottom Middle):** A table with columns 'Client ID', 'Type', 'Date', and 'Time Remaining'. It lists six entries, all with 'Past' time remaining.

Date	Headline
05/12/2009	Call Bowman for support
05/12/2009	ServicePoint down tonight
05/12/2009	3.02 Upgrade
05/12/2009	ServicePoint down tonight
05/12/2009	ServicePoint interruption
05/12/2009	ServicePoint upgrades
05/12/2009	test
05/12/2009	test

Date	Headline
05/12/2009	Staff Round Table
05/12/2009	Change Made

Client ID	Type	Date	Time Remaining
80964	Referral	06/15/2007	Past
80964	Referral	06/20/2007	Past
80964	Referral	07/01/2007	Past
80964	Referral	07/01/2007	Past
80986	Service	01/01/2008	Past
80986	Service	01/01/2008	Past

Figure 1-6

For instance, if you click the *ClientPoint* tab, (1), it will display the *ClientPoint* screen. (See Figure 1-7)

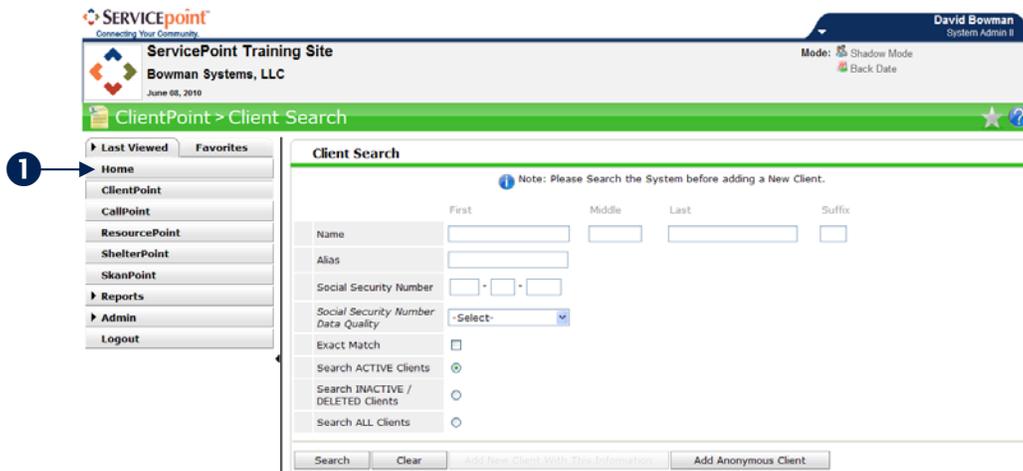


Figure 1-7

Click the *Home* tab, (1), to return to the **Home** screen. (See Figure 1-8)

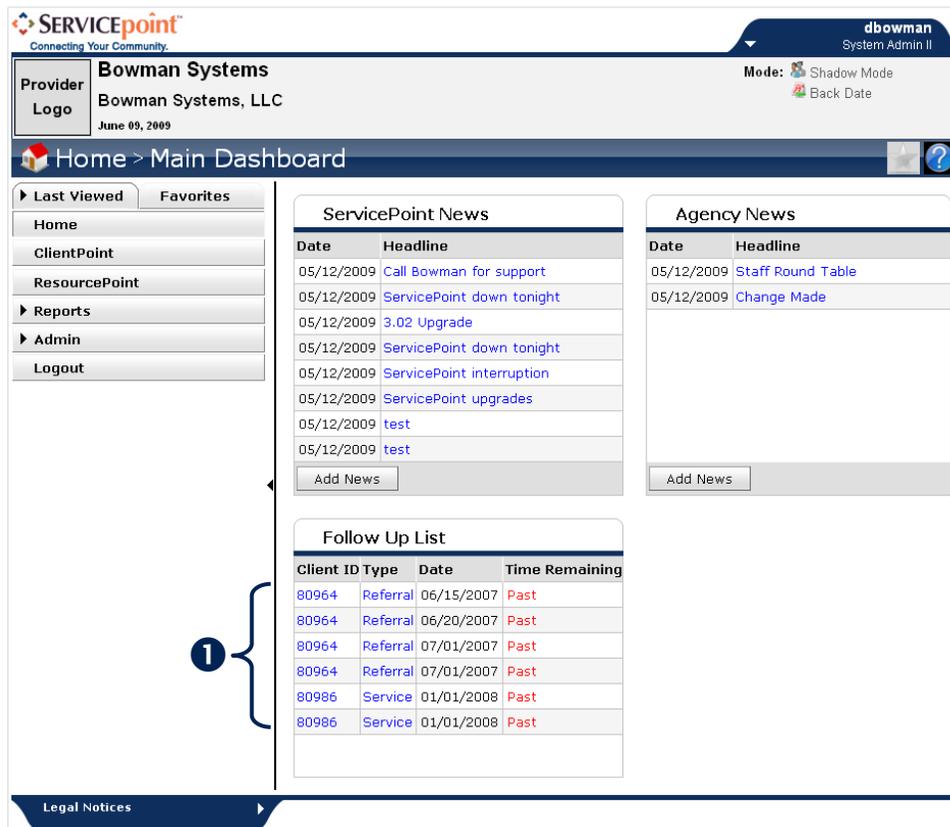


Figure 1-8

If you click one of the items in the **News** or **Follow Up List** boxes, (1), it will open that item. (See Figure 1-9)

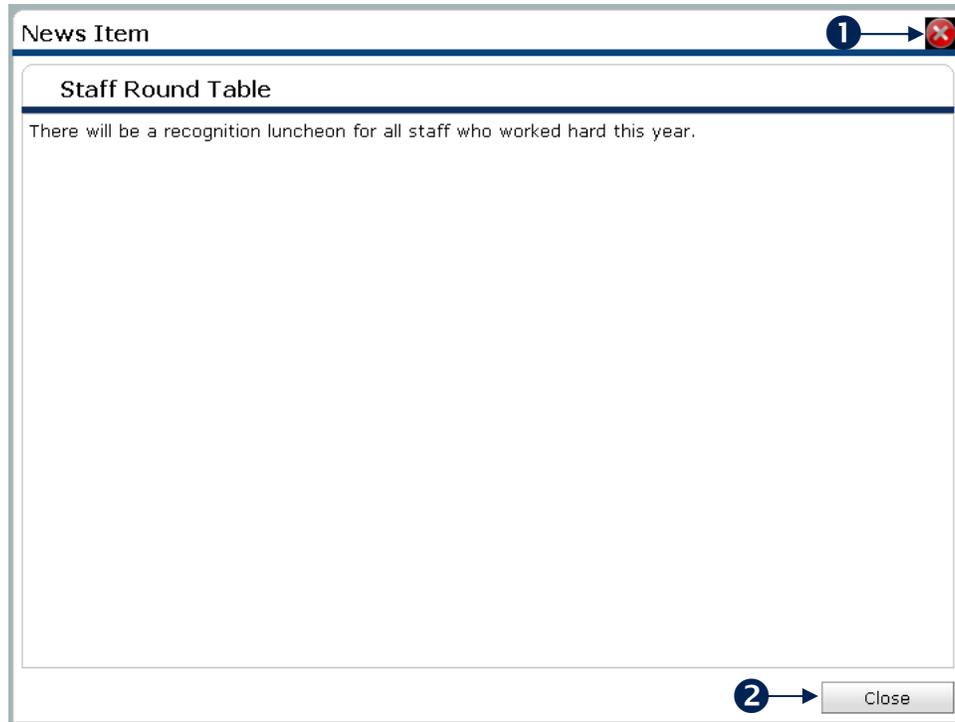


Figure 1-9

You can return to the previous screen by click the  close box, (1), or the **Close** button. (2)

*Note:* News item creation now contains more formatting options with text size, color, etc.

## 5.2 Last Viewed

For more convenient navigation, the last 10 clients accessed during a login session will automatically display in the **Last Viewed** tab. (See Figure 1-10)

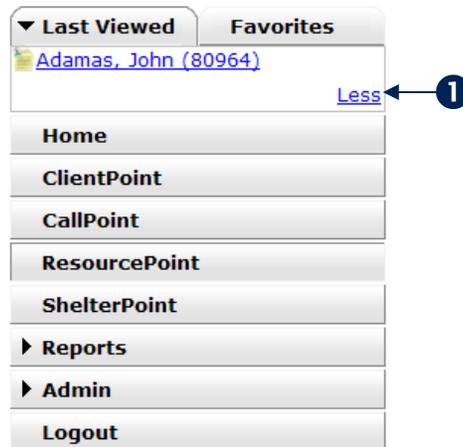


Figure 1-10

The **Less** hyperlink option allows you to reduce the number of last viewed items that are displayed. (1)

## 5.2 Favorites

This tab displays a user-created list of up to 10 clients or providers. (See Figure 1-11)

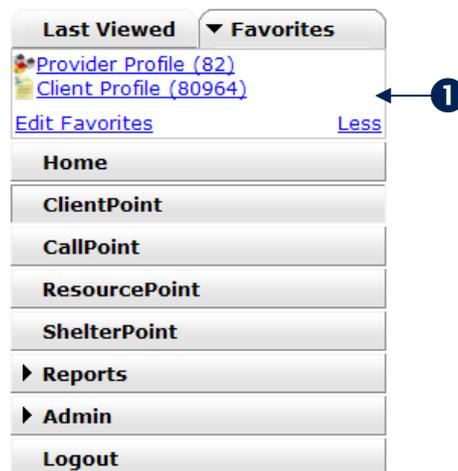


Figure 1-11

The user may edit the list by clicking edit favorites, or click the **Less** hyperlink to shorten the number of items displayed in the list. (1) When inside a client profile or provider profile the user can add an area to the favorites menu. (See Figure 1-12)

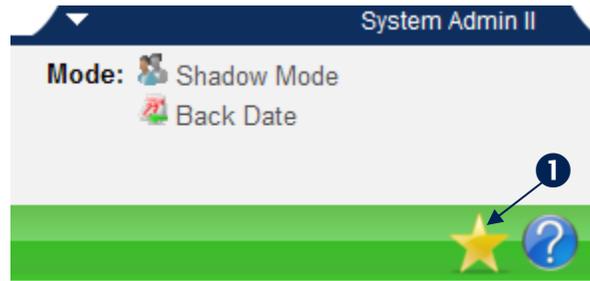


Figure 1-12

Click the gold star to add the item to the user's **Favorites** list. (1) The user's **Favorites** list will be saved for the next *ServicePoint* login session.

*Note:* The gold star indicates that something on the page can be put on the favorites list. A silver star means there is nothing on the page that can be added to the favorites list. (See Figure 1-12)

## 5.2 Help Info

Help can be accessed from anywhere in *ServicePoint*. (See Figure 1-13)

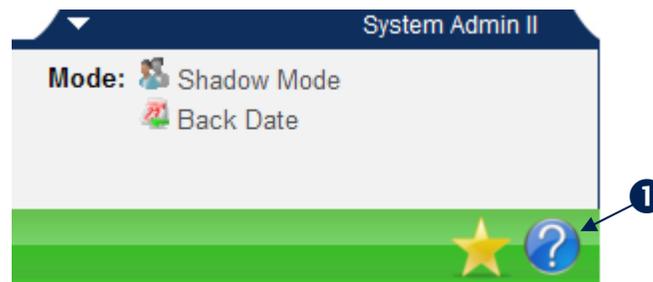


Figure 1-13

The user can click the question mark at any time to have a step by step outline of each function within *ServicePoint*. (1) (See Figure 1-14)

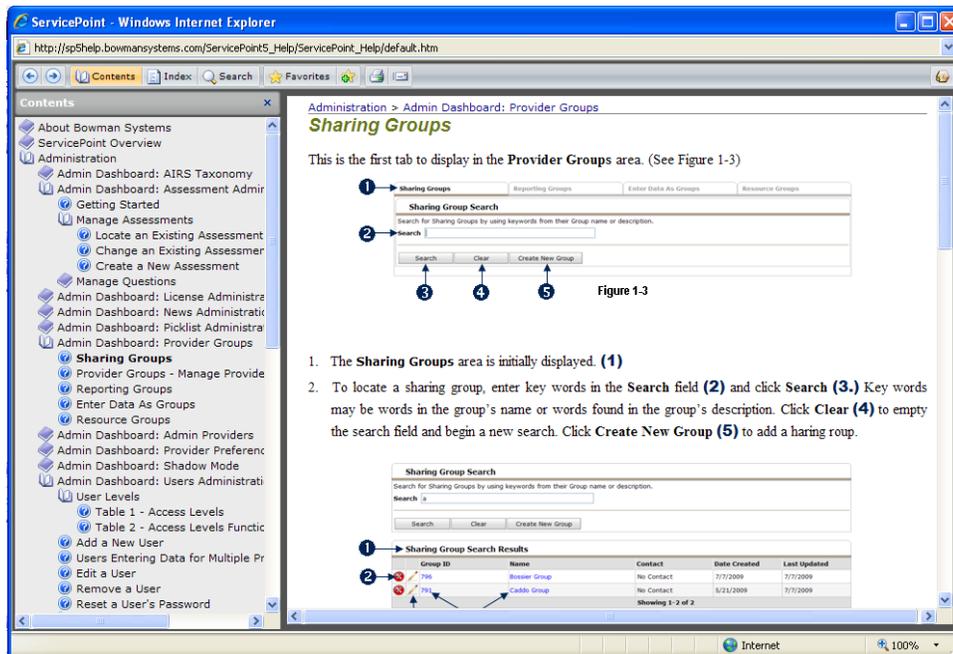


Figure 1-14

The help contains over 1,000 pages of material with thousands of indexed entries and search abilities for myriad topic. The help file is launched in a new window and allows you to browse the contents, index, perform a search, or add a collection of links to your favorites specific to the help file.

## 5.2 Collapse and Expand Navigation

Clicking an arrow/triangle will expand a list or a section of the screen. (See Figure 1-15)

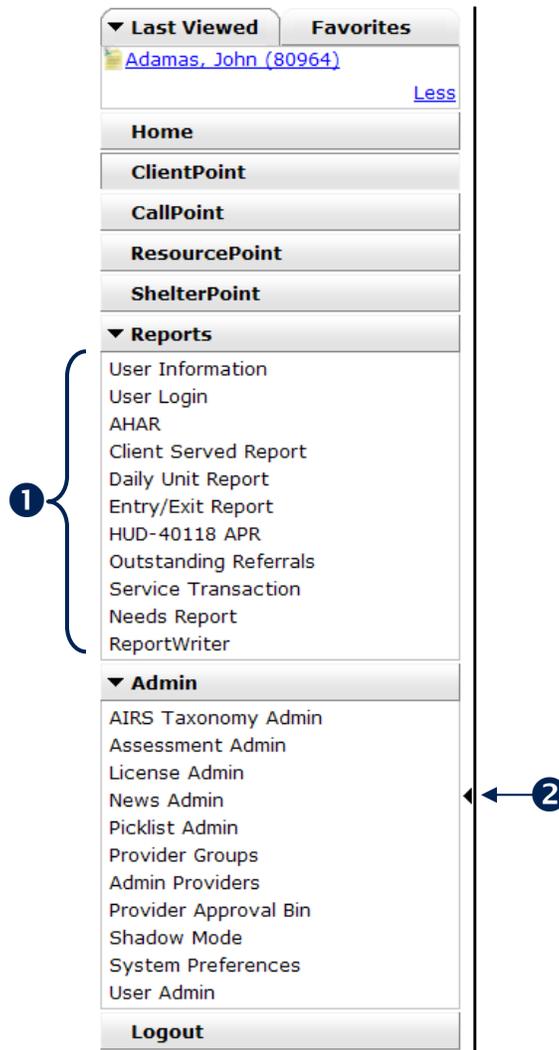


Figure 1-15

Expanding a list will reveal a sub-menu. (1) In addition, the user can hide the menu by clicking the right hand border of the menu or the black triangle. (2)

White triangles appear at both the top and bottom of the screen as well. (See Figure 1-16)

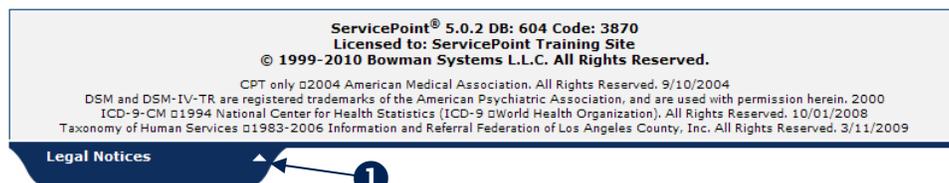


Figure 1-16

The user can create workspace on the screen and choose to close the menu when it is not in use. Expanding the legal notices section at the bottom of the screen will reveal the *ServicePoint* version, database build and licensing information. (1)

## 5.2 Shadow Mode, Back Date Mode

If the user Switches Modes the information will display here. In addition, the navigation collapse feature (white arrow) will be disabled to ensure the user is aware of the current mode. The 3 modes are **Shadow** mode, **Back Date** mode and **Enter Data As** mode. (See Figure 1-17)

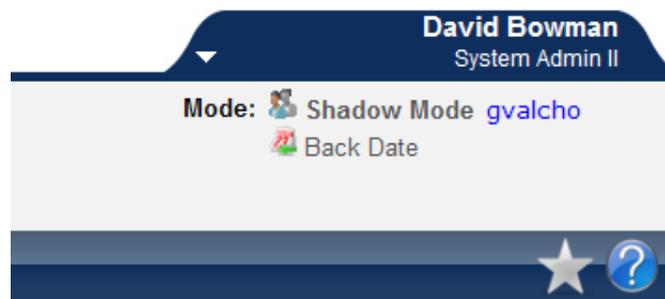


Figure 1-17

### Back Date

Enter **Back Date** mode is now at the top of the screen instead of inside of the client record as with previous versions. (1) **This ensures that each piece of data entered will timestamp with the date selected at the top of the screen. The feature allows for consistency throughout the data entry workflow.** A user now enters **Back Date** mode *prior* to entering a client record in *ClientPoint*. (See Figure 1-18)



Figure 1-18

The banner will turn yellow and lock into place so it cannot be collapsed while in back date mode. (1)

## 5.2 CLIENTPOINT

*ClientPoint* has a new look as well as new navigation features. (See Figure 1-19)

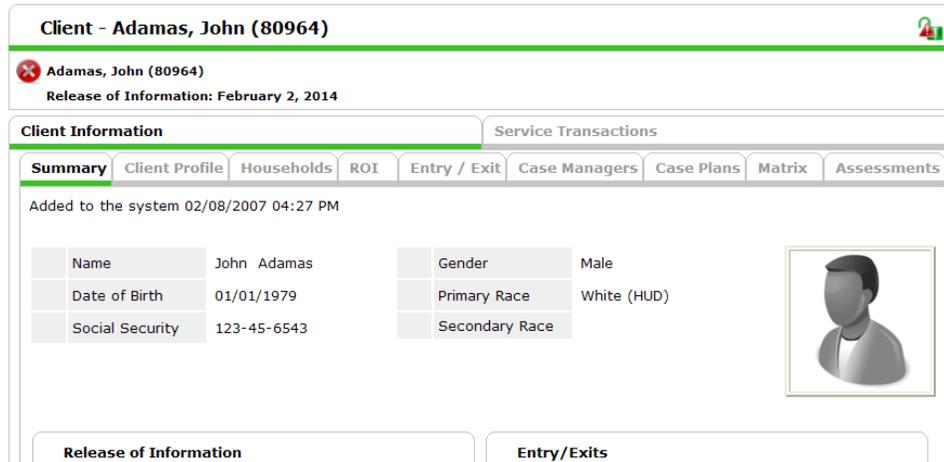


Figure 1-19

- ◆ Client records are separated into 2 tabs: **Client Information** and **Service Transactions**.
- ◆ Tabs across the page now promote an easy, "Left to Right, Top to Bottom Workflow."
- ◆ A new **Summary** tab allows the provider to configure a dashboard with up to 4 areas of the client record displaying on the page. This tab allows the user to overview portions of the client record as well as easily add elements to the record without leaving the home page!
- ◆ Client demographics are automatically displayed on the **Client Profile** and are separate from dynamic assessment information. (See Figure 1-20)

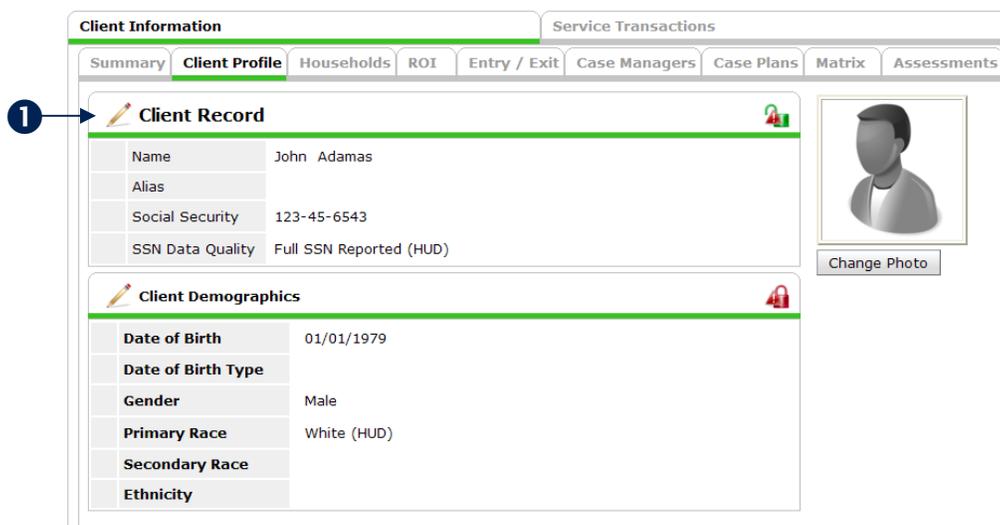


Figure 1-20

The new Client Demographics responses will have their own security static security and visibility rules for each Admin Provider. They are set in a section that can only be edited by clicking the pencil. The assessment questions are still the same and can be displayed in any other assessment for data entry. (1) The user also sees a note reminding them that altering **Client Record Data** or **Client Demographics** will alter the client unique identifier.

- ▶ **Client Picture** now shows on the **Summary** and **Client Profile** tabs as a preview. Users no longer add the photo to the **File Attachment** section at the bottom of the page. (See Figure 1-21)

*Note:* Provider Specific Setting can be turned off completely

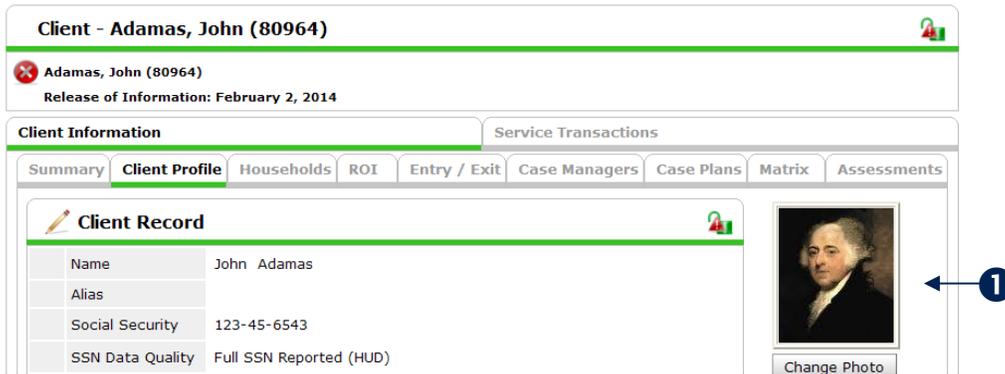


Figure 1-21

- ▶ The **Household** tab appears second in the "workflow" (unless displayed on the **Summary** tab) in order for the user to create members of a household before proceeding through the record. (See Figure 1-22)

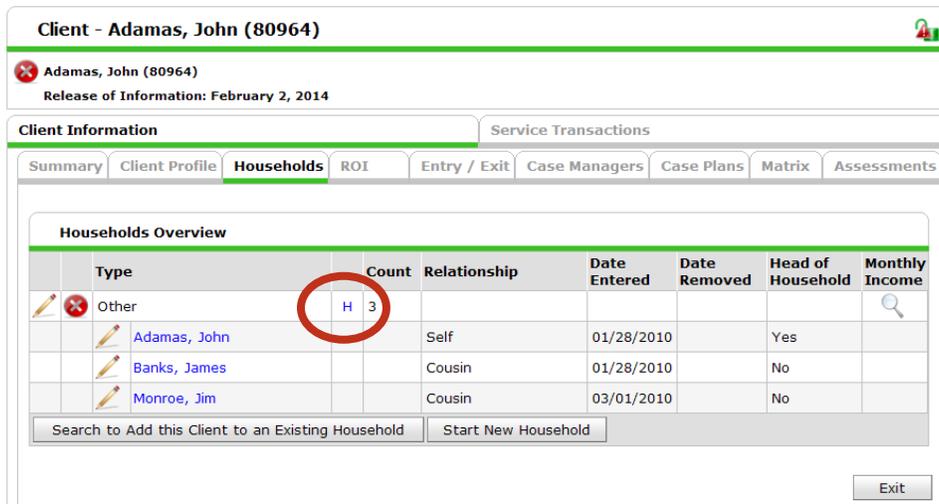


Figure 1-22

- ▶ An **H** hyperlink now appears in the **Household Overview** tab in order to review the history of household creation, which may have multiple entries. (See Figure 1-23)

Date	User	Provider	Type
03/01/2010	David Bowman	Bowman Systems, LLC	Other
01/28/2010	David Bowman	Bowman Systems, LLC	Other
01/28/2010	David Bowman	Bowman Systems, LLC	Other

Showing 1-3 of 3

Figure 1-23

- ▶ The Households tab offers the ability to view information about any of the household members or an **Edit** icon to edit the household, which is used for adding members. (See Figure 1-24)

Client - Adamas, John (80964)

Adamas, John (80964)  
Release of Information: February 2, 2014

Client Information | Service Transactions

Summary | Client Profile | **Households** | ROI | Entry / Exit | Case Managers | Case Plans | Matrix | Assessments

Households Overview

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
Other	H 3					
Adamas, John		Self	01/28/2010		Yes	
Banks, James		Cousin	01/28/2010		No	
Monroe, Jim		Cousin	03/01/2010		No	

Search to Add this Client to an Existing Household | Start New Household

Exit

Figure 1-24

Click the **Edit** icon to open the **Edit Household** screen. (See Figure 1-25)

**Edit Household**

---

**Household Overview**

ID	Name	Relationship	Date Entered	Date Removed	Head of Household
80985	Monroe, Jim	Cousin	03/01/2010		No
80964	Adamas, John	Self	01/28/2010		Yes
80965	Banks, James	Cousin	01/28/2010		No

Showing 1-3 of 3

---

**Household Type**

Household Type \*

---

**Client Search**

Note: Please Search the System before adding a New Client.

1 →

Name	First	Middle	Last	Suffix
bob				

Alias

Social Security Number  -  -

Social Security Number Data Quality

Exact Match

Search ACTIVE Clients

Search INACTIVE / DELETED Clients

Search ALL Clients

---

**Client Number**

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

---

**Client Results**

2 →

ID	Name	Social Security Number	Date of Birth	Alias	Gender
+ 80982	Adamas, Bob	111-22-2888	01/01/1989		Male
+ 80850	Gassler, Bebe				
+ 81087	Sled, Bob	999-99-9999	01/01/1990		Male

Showing 1-3 of 3

Figure 1-25

Search for the client you wish to add. (1) Click the green plus sign  to open the **Add New Household Member** window. (2) (See Figure 1-26)

Add New Household Member	
Client	Adamas, Bob (80982)
Head of Household	No
Relationship to Head of Household	Brother
Date Entered *	04 / 04 / 2010
Date Removed	

Save Cancel

Figure 1-26

Clients added to the household have a separate pop-up window where the user can select each member's relationship to the head of household *before* adding the member to the household.

- ▶ **Entry/Exits** can now be shared as a static security element with its own visibility rules. In SP 4.x, there was no way for anyone other than a System Administrator to see a Client's Entry/Exits for providers outside the user's EDA list or Provider Tree. Now, for example, a user can share the fact that he has enrolled Client X with any Provider I.
- ▶ **Entry/ Exit Type** can now determine the Entry Assessment that will display in the Entry/Exit. For example, an administrator can have the APR Entry Assessment display when selecting HUD and the HPRP Entry Assessment display when selecting HPRP. (See Figure 1-27)

Entry Data	
Note: If you change the provider selected it may i Assessment defaults. Any information saved to the p	
Provider *	Professional Services Training Provider (1)
Type *	HUD
Entry Date *	06 / 15 / 2010
APR Entry Entry Assessment	

Entry Data	
Note: If you change the provider selected Assessment defaults. Any information sa	
Provider *	Professional Services Provider (1)
Type *	HPRP
Entry Date *	06 / 15 / 2010
HPRP Entry Assessment	

Figure 1-27

- ▶ Assessments now display in list form. The user will select the name of the assessment necessary for data entry and the page will load the appropriate assessment. (See Figure 1-28)

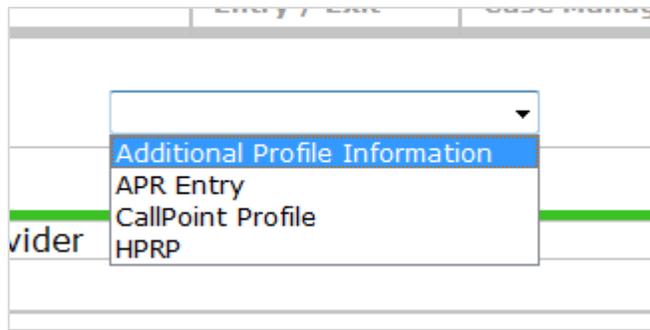


Figure 1-28

- ▶ The history on **Question** values displays in a pop-up window. (See Figure 1-29)

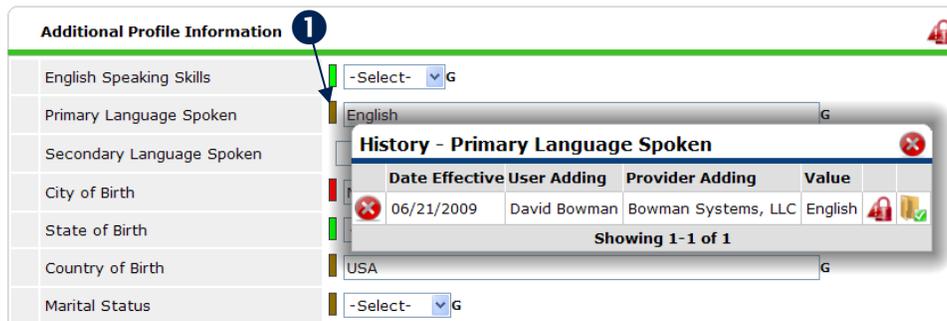


Figure 1-29

The pop-up window appears by clicking the colored gauge to the left of a question. (1) There is no longer an **H** to view the history with in question history. History display has also been added to the Household Overview to display the history of Household Type.

- ▶ The **Case Manager** tab allows users to add, edit, and delete case managers. (See Figure 1-30)

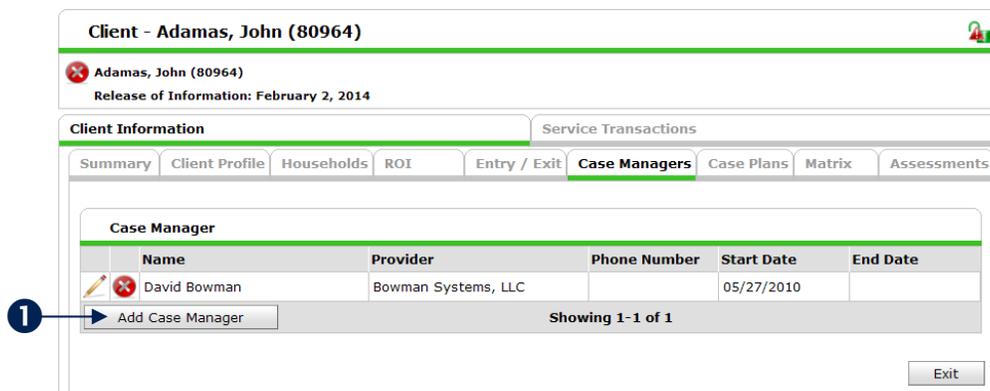


Figure 1-30

Click **Add Case Manager**, (1), to select a case manager for the client. (See Figure 1-31)

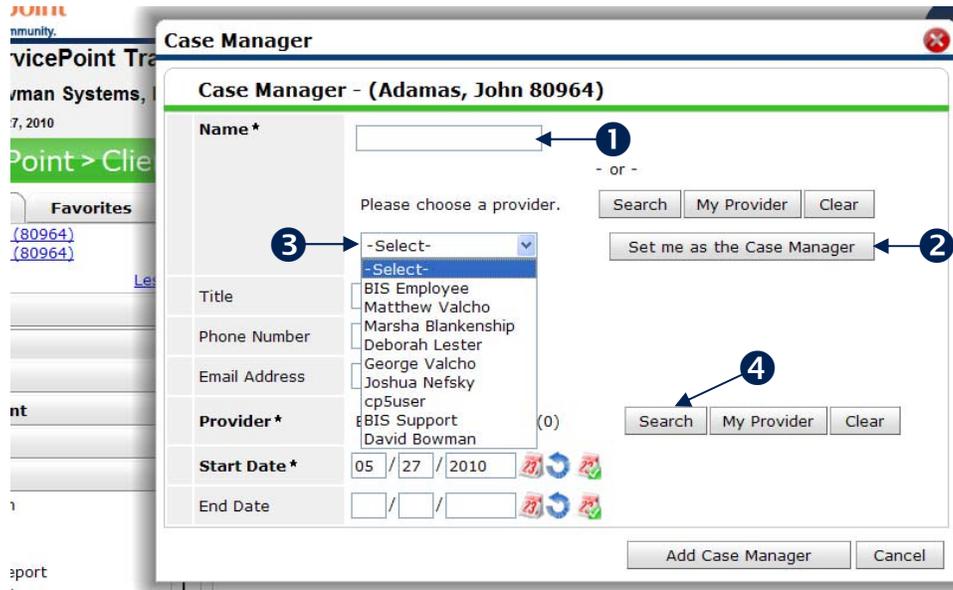


Figure 1-31

There are several ways to set the case manager:

- Enter the name into the field. (1)
- Click **Set me as the Case Manager**. (2)
- Select a user from the pick list, which is populated with users assigned to the current provider. (3)
- Search for a different provider and select a user name from that provider's list of users. (4)

#### IMPORTANT

Administrators should ensure up-to-date information in each of the user profiles to ensure accuracy in the **Case Manager** tab.

- Enhanced follow up functionality allows a user to select another user for follow up with a client. The follow up option appears in **Case Plans**, **Service Transactions** and **Call Records**, allowing for truly coordinated records. (See Figure 1-32)

The screenshot shows a form with several fields: 'If Closed, Outcome' (dropdown), 'Projected Follow Up Date' (date field), 'Follow Up User' (dropdown with search buttons), 'Follow Up Made' (dropdown), 'Completed Follow Up Date' (date field), and 'Outcome at Follow Up' (dropdown). A blue circle with the number '1' and an arrow points to the 'Follow Up User' dropdown menu, which is open and shows a list of users: '-Select-', '-Select-', BIS Employee, Matthew Valcho, Marsha Blankenship, Deborah Lester, George Valcho, Joshua Nefsky, cp5user, and BIS Support.

Figure 1-32

- ▶ The **Service Transaction Dashboard** allows each end user to select the appropriate icon to meet the data entry needs of their program. Users can create needs without services, *services that automatically generate needs*, multiple services and referrals by clicking the appropriate icon. (See Figure 1-33)

The screenshot shows the 'Service Transaction Dashboard' for 'Client - Adamas, John (80964)'. The dashboard includes a header with the client name and a release of information date (February 2, 2014). Below the header, there are two tabs: 'Client Information' and 'Service Transactions'. The 'Service Transactions' tab is active, showing a dashboard with six icons: 'Add Need', 'Add Service', 'Add Multiple Services', 'Add Referrals', 'View Previous Service Transactions', and 'View Entire Service History'.

Figure 1-33

- When recording service costs, you can now add more than 2 funding sources to the transaction. (See Figure 1-34)

Figure 1-34

Click **Add Funding Source** to add one or many funding sources. (1)

## 5.2 SHELTERPOINT

- *ShelterPoint* users will now have access to a **Transaction Dashboard**. (See Figure 1-35)

Figure 1-35

The user can jump to a specific area in the "roster" in order to quickly manage transactions.

- *ShelterPoint* also has a new feature called **Express Check In**, which must be activated from the Admin area (See below). This allows a user to create a list of clients and have them populate the next available bed, or an overflow bed on the roster.

- Incidents for clients can now be shown during check in, which must also be activated from the Admin area.
- ShelterPoint* options can be set in the Administration area under **Provider Preferences**. (See Figure 1-36)



Figure 1-36

- Click **Provider Preferences**. (1) (See Figure 1-37)



Figure 1-37

- Search for a provider, (1), and click the provider name. (2) (See Figure 1-38)

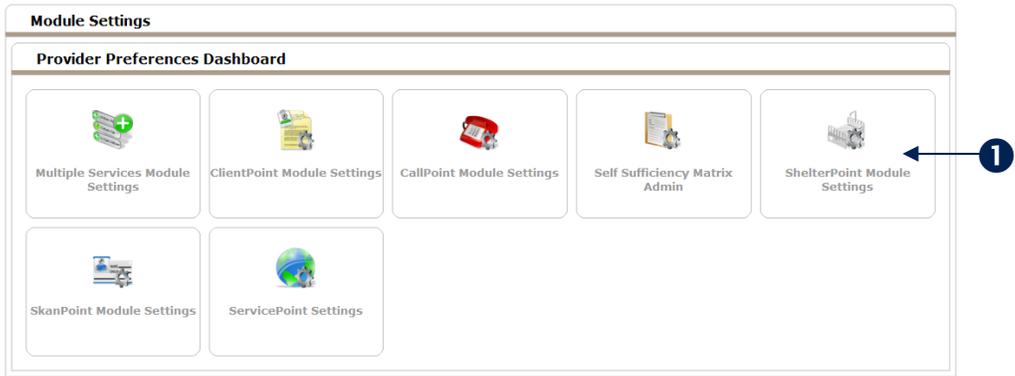


Figure 1-38

3. Click **ShelterPoint Module Settings**. (1) (See Figure 1-39)

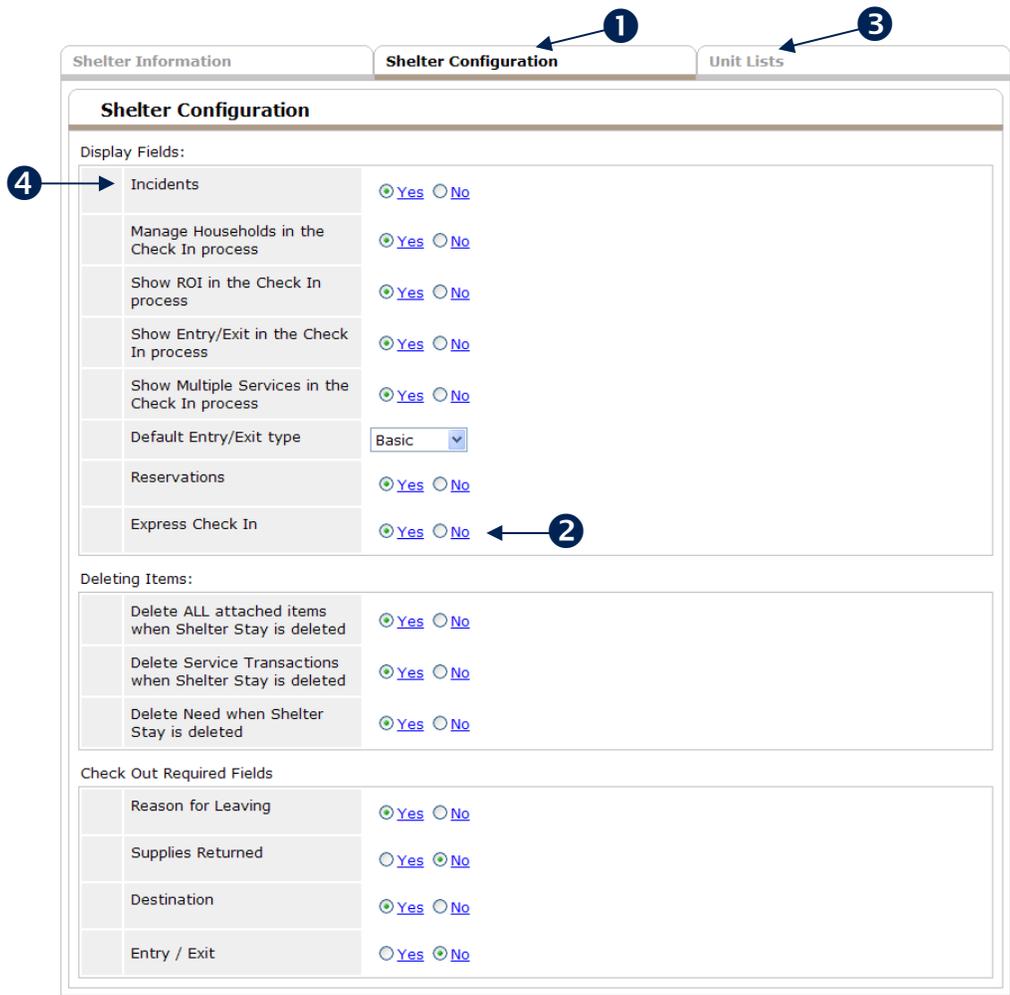


Figure 1-39

- From the **Shelter Configuration** tab, (1), you can select **Express Check In** as an option to display.
- The specific details of the unit lists can be managed in the **Unit Lists** tab. (2) Click **Yes** next to Incidents to activate this on the check in screen. (3) (See Figure 1-40)

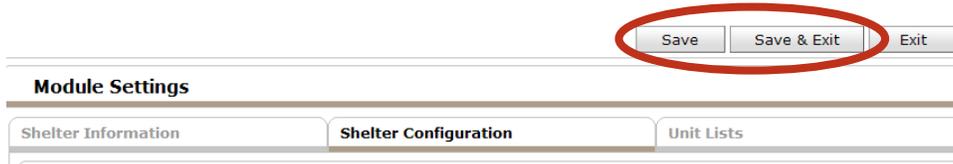


Figure 1-40

- Click **Save** or **Save & Exit** to activate the **Express Check In** feature.

➤ An *Assessment* can now be set to display during the check in process. (See Figure 1-41)

A screenshot of a form titled "Entry Data". It contains several sections. The first section is "Entry Data" with fields for "Provider\*" (Bowman Systems, LLC (0)) and "Type\*" (HUD). Below this is a section titled "Default Shelter Assessment" which is circled in red. The text in this section reads "No Shelter Check In Assessment specified for this Provider". Below that is a section titled "Multiple Services" with a note: "Note: Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page".

Figure 1-41

By default, no shelter check in assessment will appear. Go to the **Admin** area to activate a default shelter assessment. (See Figure 1-42)



**(0) Bowman Systems, LLC**



Provider ID	0
<b>Provider Name *</b>	Bowman Systems, LLC
Agency/Program (AKA)	
Parent Provider	None
Profile Image	<input type="button" value="Change"/> <input type="button" value="Clear"/>
Created	08/15/2008 04:50 PM
Last Updated	06/30/2010 08:34 PM
HUD/HMIS Provider	<input checked="" type="checkbox"/>
AIRS Compliant	<input checked="" type="checkbox"/>
Uses ServicePoint	<input checked="" type="checkbox"/>
Operational	<input checked="" type="checkbox"/>

Profile	Visibility	Services	Module Settings	<b>Assessments</b>	Maintenance
Provider Profile	Standards Information	Provider Access			

Figure 1-44

3. Click the **Assessments** tab. (See Figure 1-45)

Profile	Visibility	Services	Module Settings	<b>Assessments</b>	Maintenance
---------	------------	----------	-----------------	--------------------	-------------

<b>Assessment Availability</b>	<b>Assessment Display Settings</b>
--------------------------------	------------------------------------

**Available Assessments**

Type	Name	Last Updated
<input checked="" type="checkbox"/> Client Record	PATH	05/12/2009
<input checked="" type="checkbox"/> Provider Record	Physician Volunteers	02/20/2010

Showing 1 - 2 of 2

**Assigned Assessments**

Type	Name	Last Updated
<input type="checkbox"/>		

Figure 1-45

4. Click the **Assessment Display Settings** tab. (See Figure 1-46)

Client Assessment Display			
Show on Default	Additional Profile Information	Select Assessment	Clear Assessment
Show on Profile	Additional Profile Information	Select Assessment	Clear Assessment
Show on Client Summary Tab		Select Assessment	Clear Assessment
Show on Standard Entry	Employment	Select Assessment	Clear Assessment
Show on Standard Exit	Employment	Select Assessment	Clear Assessment
Show on HUD Entry		Select Assessment	Clear Assessment
Show on HUD Exit		Select Assessment	Clear Assessment
Show on HPRP Entry		Select Assessment	Clear Assessment
Show on HPRP Exit		Select Assessment	Clear Assessment
Show on PATH Entry		Select Assessment	Clear Assessment
Show on PATH Exit		Select Assessment	Clear Assessment
Show on Basic Entry		Select Assessment	Clear Assessment
Show on Basic Exit		Select Assessment	Clear Assessment
Show on CallPoint Caller Profile	Diagnosis	Select Assessment	Clear Assessment
Show on CallPoint Follow Up	CallPoint Profile	Select Assessment	Clear Assessment
Show on CallPoint Current Call Record	CallPoint Profile	Select Assessment	Clear Assessment
Show on SkanPoint		Select Assessment	Clear Assessment
Show on ShelterPoint Check In		Select Assessment	Clear Assessment

Figure 1-46

5. Click **Select Assessment** next to **Show on ShelterPoint Check In**. (See Figure 1-47)

### Assessment Search

**Search (Assessments)**

Search for Assessments by Assessment Name, Description, or Type. To add a new Assessment, first select the Type you would like to add.

Search

Type -Select-

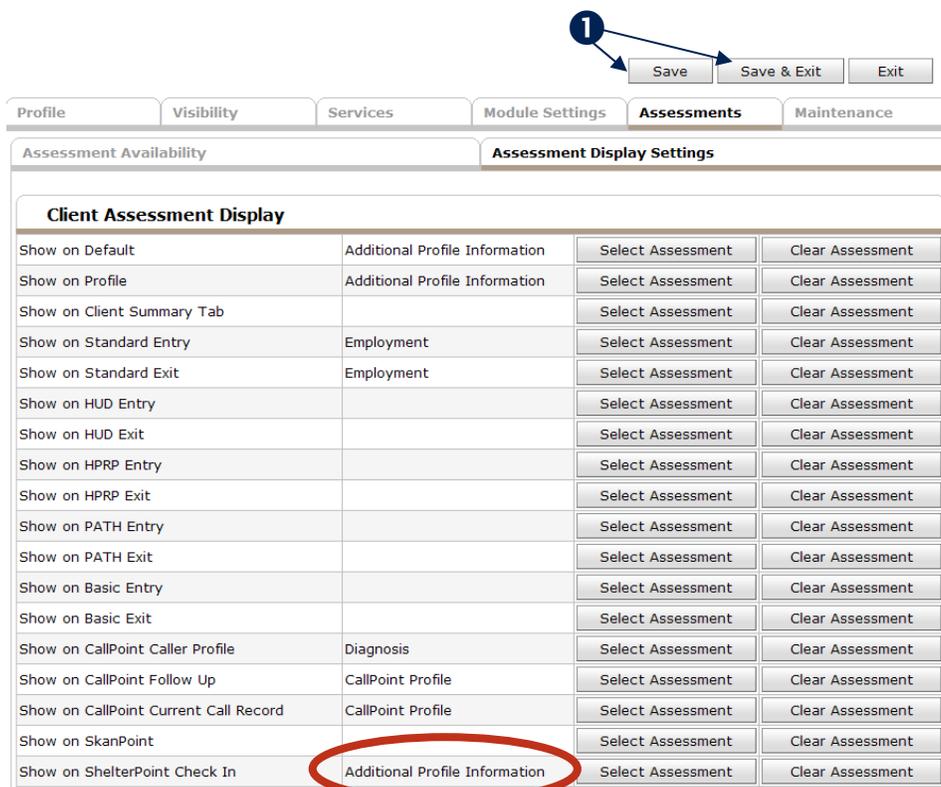
**Search Results**

Name	Date Created	Date Updated
Additional Profile Information	05/12/2009	10/26/2009
CallPoint Profile	05/12/2009	05/12/2009
CCAP	05/12/2009	05/12/2009
Centerpoint I&R - 211	05/12/2009	05/12/2009
Childhood Immunization	05/12/2009	05/12/2009
Children	05/12/2009	05/12/2009
Client Budget and Expenses	05/12/2009	05/12/2009
Custom System Fields	05/12/2009	05/12/2009
Diagnosis	05/12/2009	05/12/2009
Education	05/12/2009	05/12/2009

Showing 1-10 of 34

Figure 1-47

- Search for and select an assessment by clicking the green plus sign.  (See Figure 1-48)



Assessment Availability		Assessment Display Settings	
<b>Client Assessment Display</b>			
Show on Default	Additional Profile Information	Select Assessment	Clear Assessment
Show on Profile	Additional Profile Information	Select Assessment	Clear Assessment
Show on Client Summary Tab		Select Assessment	Clear Assessment
Show on Standard Entry	Employment	Select Assessment	Clear Assessment
Show on Standard Exit	Employment	Select Assessment	Clear Assessment
Show on HUD Entry		Select Assessment	Clear Assessment
Show on HUD Exit		Select Assessment	Clear Assessment
Show on HPRP Entry		Select Assessment	Clear Assessment
Show on HPRP Exit		Select Assessment	Clear Assessment
Show on PATH Entry		Select Assessment	Clear Assessment
Show on PATH Exit		Select Assessment	Clear Assessment
Show on Basic Entry		Select Assessment	Clear Assessment
Show on Basic Exit		Select Assessment	Clear Assessment
Show on CallPoint Caller Profile	Diagnosis	Select Assessment	Clear Assessment
Show on CallPoint Follow Up	CallPoint Profile	Select Assessment	Clear Assessment
Show on CallPoint Current Call Record	CallPoint Profile	Select Assessment	Clear Assessment
Show on SkanPoint		Select Assessment	Clear Assessment
Show on ShelterPoint Check In	Additional Profile Information	Select Assessment	Clear Assessment

Figure 1-48

- The selected assessment will be indicated on the screen. Click **Save** or **Save & Exit** to activate the changes. (1) Now the assessment will display on the *ShelterPoint* check in screen. (See Figure 1-49)

**Additional Profile Information**

English Speaking Skills: -Select- G

Primary Language Spoken: G

Secondary Language Spoken: G

City of Birth: G

State of Birth: -Select- G

Country of Birth: G

Marital Status: -Select- G

**Emergency Contacts**

Contact's Name	Contact Type	Contact's City	Phone Number	Relationship to Client
Add				

Non-confidential notes: G

Email Address: G

Save Cancel

Figure 1-49

## 5.2 ADMIN PROVIDERS

The new **Maintenance** tab allows a user to create subordinate and equivalent providers. The terminology in the new version is as follows, "child" provider is now "subordinate" provider and "sibling" provider is now "equivalent" provider. (See Figure 1-50)

**(82) Bowman Center**

Provider ID: 82

Provider Name \*: Bowman Center

Agency/Program (AKA):

Parent Provider: None

Profile Image: Change Clear

 Created: 12/27/1999 12:00 AM

Last Updated: 02/16/2010 02:08 PM

HUD/HMIS Provider:

AIRS Compliant:

Uses ServicePoint:

Operational:

Save Save & Exit Exit

Profile Visibility Services Module Settings Assessments **Maintenance**

Add Provider Copy Provider Provider Tree

Figure 1-50

- ◆ The maintenance tab also shows the entire **Provider Tree Structure!** (See Figure 1-51)



Figure 1-51

- Visibility in the new version is where **Security** and **Visibility** will be controlled for each provider. (See Figure 1-52)

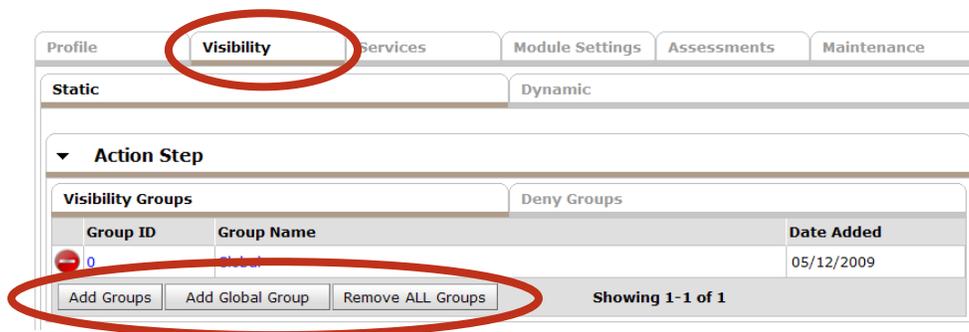


Figure 1-52

- The Administrator will create **Visibility Groups** that will then be applied to each provider as static or dynamic security rules to allow for the sharing "visibility" or denial "deny" of sharing data. A "Global" group will automatically be created in *ServicePoint* and it will automatically include all providers in the database. (See Figure 1-53)

*Note:* When a new provider is created, it will automatically be added to the Global Group. In addition, new "subordinate" providers will automatically be added to any group where the icon for "this provider and its children" has been selected, and retroactively share all data that had been entered in the provider where the group had been applied. 🗑️➕

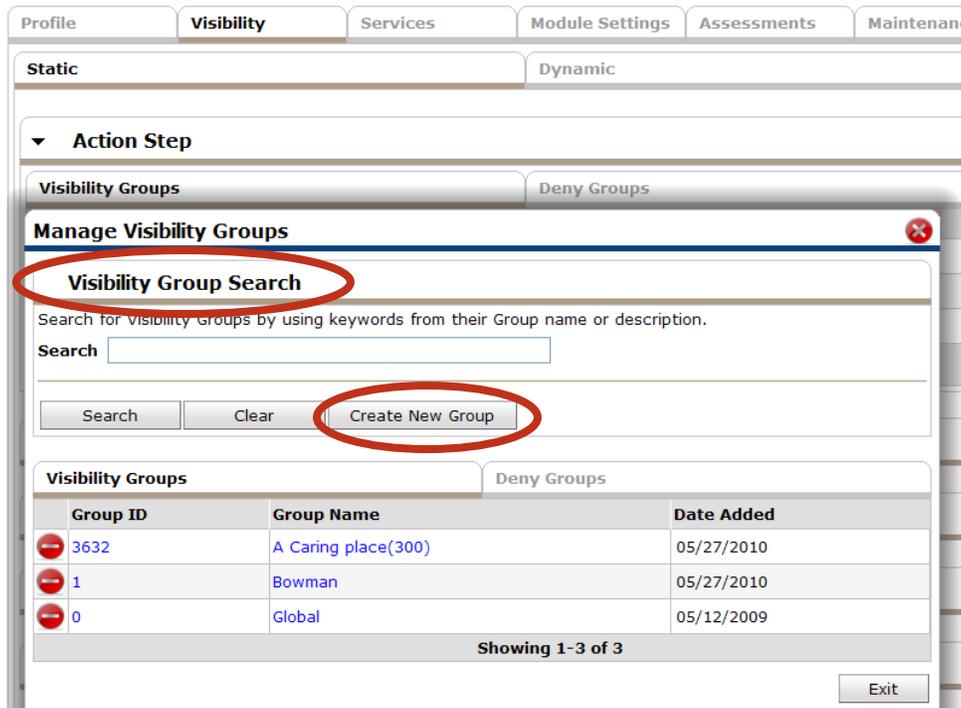


Figure 1-53

- 1) Visibility Groups need to have a **Type** assigned upon creation. (See Figure 1-54)

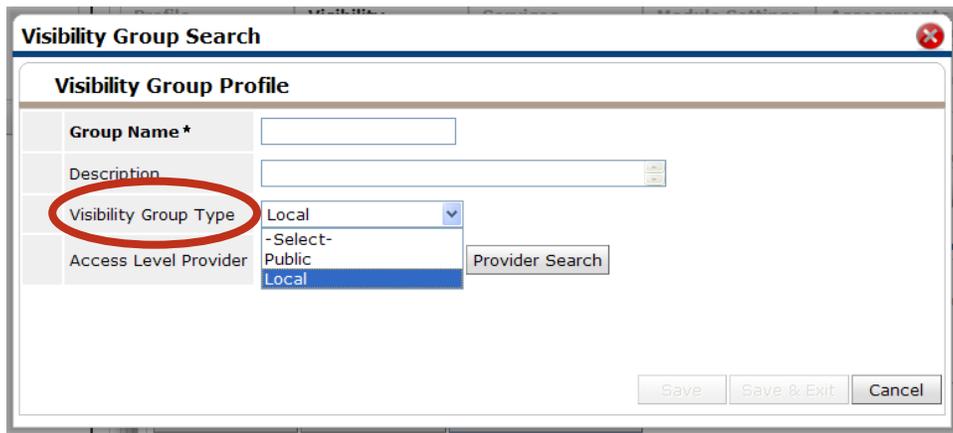


Figure 1-54

- Local groups are created by System Administrators; however, only the provider at the access level.
  - Public groups can be applied by any user with access to security and visibility in *ServicePoint*.
- 2) Sharing can be configured outside of information silos and across provider trees using public or local groups!

- ▶ **Module Settings** are available within each **Admin Provider** section. These settings will allow each provider to customize each module to enhance the end user experience. (See Figure 1-55)

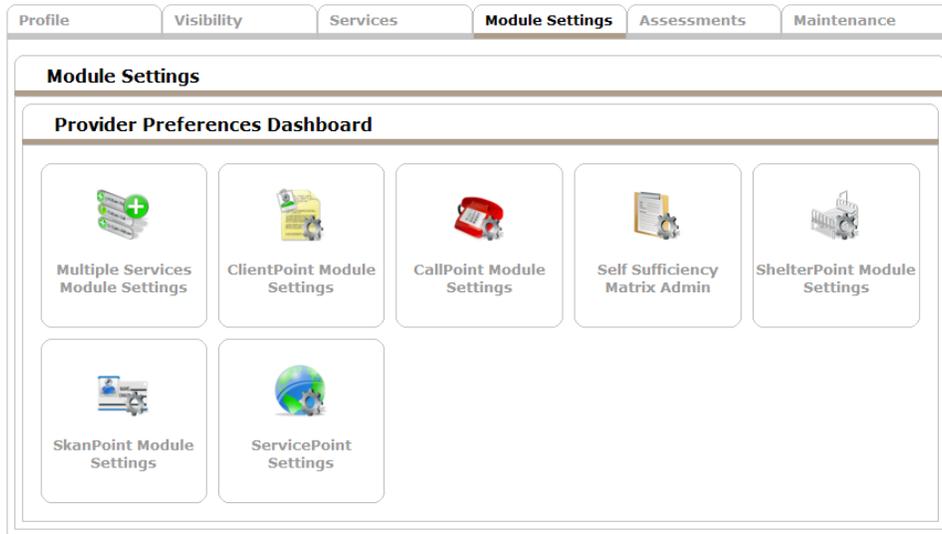
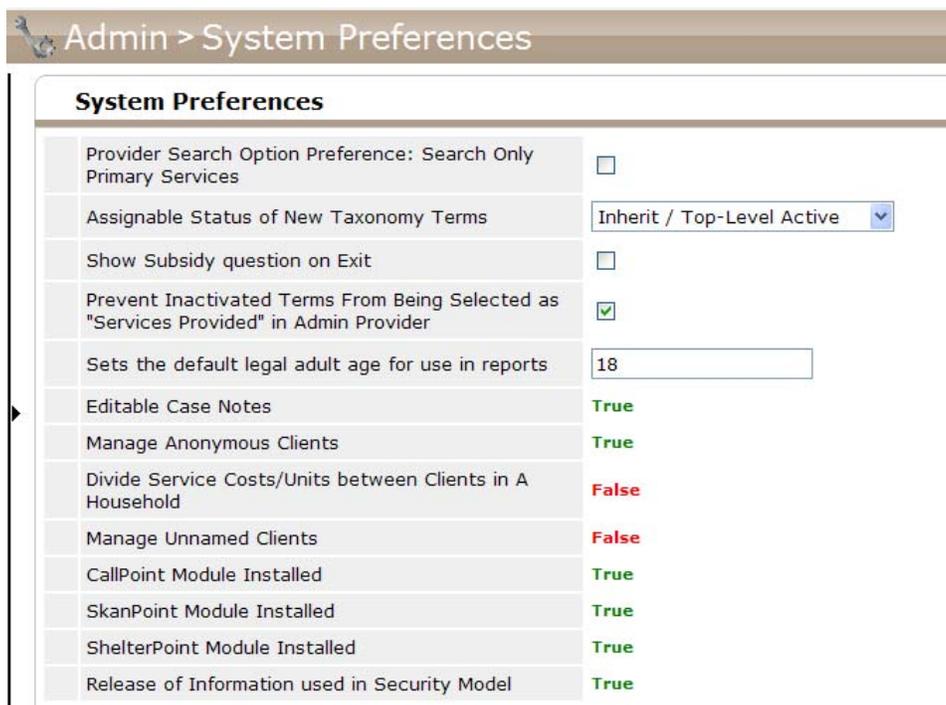


Figure 1-55

## 5.2 SYSTEM PREFERENCES

**System Preferences** now have **red** and **green** text to indicate the application settings in the database. Settings with red and green must be administered by customer support at Bowman Systems. (See Figure 1-56)



The screenshot shows the 'Admin > System Preferences' interface. It features a table of settings with the following details:

System Preferences	
Provider Search Option Preference: Search Only Primary Services	<input type="checkbox"/>
Assignable Status of New Taxonomy Terms	Inherit / Top-Level Active
Show Subsidy question on Exit	<input type="checkbox"/>
Prevent Inactivated Terms From Being Selected as "Services Provided" in Admin Provider	<input checked="" type="checkbox"/>
Sets the default legal adult age for use in reports	18
Editable Case Notes	True
Manage Anonymous Clients	True
Divide Service Costs/Units between Clients in A Household	False
Manage Unnamed Clients	False
CallPoint Module Installed	True
SkanPoint Module Installed	True
ShelterPoint Module Installed	True
Release of Information used in Security Model	True

Figure 1-56

- Editable Case Notes** – When checked this setting allows users to edit **Case Notes** in the **Case Plan** area of *ServicePoint*.
- Manage Anonymous Clients** – When checked this setting allows anonymous clients to be added to the *ServicePoint* database.
- Divide Service Costs/Units between Clients in a Household** – When checked this setting creates a new subsection on the service transaction screen. The subsection permits Source, Cost of Service, Number of Units, Unit Type, and Cost of Units to be entered and applied to select family members. This feature allows transaction details to be associated specifically with family members as opposed to (when this feature is unchecked) applying details wholly to the transaction. This feature may be useful for reporting purposes when reporting individual (not family) activity.
- Manage Unnamed Clients** – When checked this setting allows unnamed clients to be added to the *ServicePoint* database.
- Provider Search Option Preferences: Search Only Primary Services** – When checked this setting limits **Provider Search** results to service providers that have the requested service code listed as a primary service.

- f: **CallPoint Module Installed** – When checked this setting informs the *ServicePoint* application that *CallPoint* is active
- g: **SkandPoint Module Installed** – When checked this setting informs the *ServicePoint* application that *SkandPoint* is active
- h: **ShelterPoint Module Installed** – When checked this setting informs the *ServicePoint* application that ShelterPoint is active
- i: **Assign Status of New Taxonomy Terms** – This setting includes a drop down menu. The choices are:
  - 1) **Active** – If selected new taxonomy terms will be set to Active.
  - 2) **Inactive** – If selected new taxonomy terms will be set to Inactive
  - 3) **Inherent / Top Level Active** – If selected new taxonomy terms will be set to match the next highest level term, and new Top Level terms will be set to Active.
  - 4) **Inherent / Top Level Inactive** – If selected new taxonomy terms will be set to match the next highest level term, and new Top Level terms will be set to Inactive.
- j: **Show Subsidy Question on Exit** – When checked this setting informs *ServicePoint* to display the Subsidy question in the Exit assessment.
- k: **Release of Information used in Security Model** – When checked this setting instructs *ServicePoint* to use the Release of Information in the system security.
- l: **Prevent Inactivated Terms From Being Selected as "Services Provided" in Admin Provider** – When checked this setting prevents inactivated taxonomy terms from being assigned to providers in Admin Providers.
- m: **Sets the default legal adult age for use in reports** – This input field, when populated, sets the default legal age for use in reports. Typically, this field is set to 18.



**User Licenses**

**Advanced Reporting Tool Licenses**

License#	Type	Date Purchased	Date Expires	Date Assigned to User
Assign License				

**Allocated User License**

License #	Provider Name	Date Purchased	Date Expires	Date Assigned to User
19	Bowman Systems, LLC	Friday, August 15, 2008		Tuesday, May 12, 2009

Save Save & Exit Exit

Figure 1-58

➤ From License Administration Page. (See Figure 1-59)

**ServicePoint Licenses**      **ART Licenses**

**Licenses**

Total	Allocated to My Provider	Unassigned by My Provider	Allocated to Other Providers	Unassigned by Other Providers
307	265	251	42	33

Give a Provider ServicePoint Access    Purchase Additional Licenses

**Providers**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider ID	Name														Number Allocated	Used											
2169	Agency Red														1	0	Allocate Licenses	Assign License									
82	Bowman Center														9	3	Allocate Licenses	Assign License									
2774	Bowman Community House														2	0	Allocate Licenses	Assign License									
3038	Bowman Help Center														10	4	Allocate Licenses	Assign License									
0	Bowman Systems, LLC														265	14	Allocate Licenses	Assign License									
80	House & Home Family Support Agency														10	0	Allocate Licenses	Assign License									
177	T.J. Crawford House														10	2	Allocate Licenses	Assign License									

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Figure 1-59

## 5.2 PROVIDER GROUPS

There are 4 types of groups in *ServicePoint*. (See Figure 1-60)



Admin > Provider Group Admin

Visibility Groups Reporting Groups Enter Data As Groups Resource Groups

**Visibility Group Search**

Search for Visibility Groups by using keywords from their Group name or description.

Search

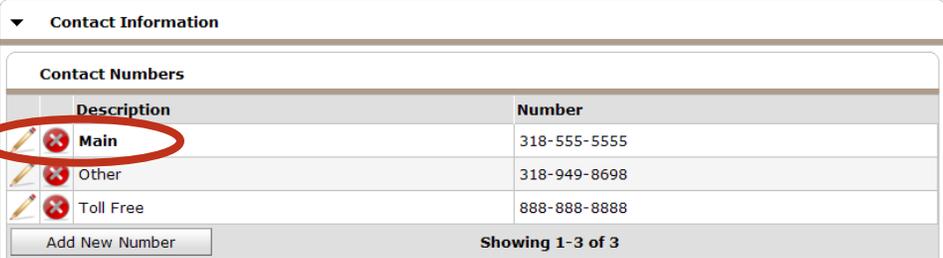
Search Clear Create New Group

Figure 1-60

- **Enter Data As Groups** – These groups should be applied to users who need permission to either Enter Data as another provider, or run reports for another provider.
- **Reporting Groups** – These groups function to allow administrators to run reports on groups of providers. This group is the same as “Provider Groups” in previous versions.
- **Resource Groups** – These groups lock administrators from the ability to edit the Admin Provider pages of *ServicePoint*. This group is applied to the Users.
- **Visibility Groups**- These groups are applied to the visibility tab of *ServicePoint* and allow for security configurations to static and dynamic elements. Visibility Groups can also be added directly from a Client Record to alter the default visibility rules for that Provider.

## 5.2 PROVIDER PROFILE (INFORMATION FOR RESOURCEPOINT)

- ▶ A user can enter multiple contact numbers for an organization. Those numbers can also be marked as "hidden," similar to the "resource contact" in earlier versions. The contact number marked as "primary" will display in bold. (See Figure 1-61)

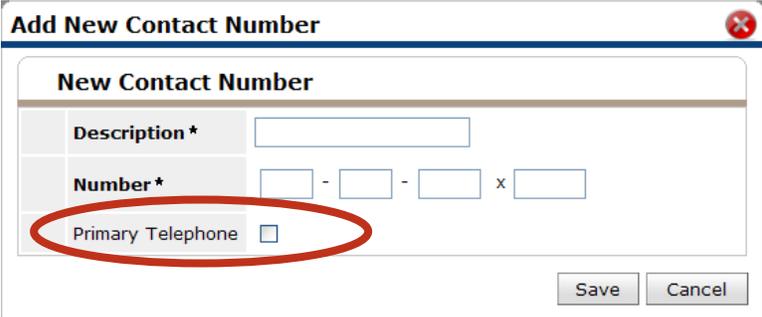


Description	Number
<b>Main</b>	318-555-5555
Other	318-949-8698
Toll Free	888-888-8888

Showing 1-3 of 3

Figure 1-61

- ▶ Primary contact will appear in bold. Only one contact can be marked as primary and the primary number cannot be deleted until it is replaced with another primary number. (See Figure 1-62)



**Add New Contact Number**

**New Contact Number**

Description \*

Number \*  -  -  x

Primary Telephone

Save Cancel

Figure 1-62

- ▶ **Geography Served** within the Services Tab of a Provider facilitates entering correct geographic terms used in searching Providers in *ResourcePoint* or *CommunityPoint*. (See Figure 1-63)
- ▶ In *ServicePoint* 4.x there was no relationship between Zips, Cities, Counties, or States. These were all treated as separate picklists (Zips were text areas) that each account had to fill in (States was standard, but the rest were left to each provider). This made it really hard to say which "areas" a provider served with any reliability. *ServicePoint* 5.2 now uses a Zip Code database in Admin Providers and in certain Assessment fields (primarily used in *CallPoint*, but could be used anywhere Assessment fields are) that will allow the user to enter the Zip Code and have it auto-fill the City, County, and State. *ServicePoint* 5.2 uses this extensively when indicating the Provider's Geography Served—so, for instance, they can say they serve the whole county/parish of Caddo—all the cities and zips in Caddo are inserted at once.

**Manage Provider Geography Served**

---

**Search Criteria**

Select a state from the drop-down list below before searching for county, city, and/or ZIP Code

State:

Search:

---

Search Results				Provider Served States	
ZIP Code	City	County/Parish	State	State	
				<input type="checkbox"/> Louisiana	LA

Selected State: LA

Show All      Showing 1-1 of 1      Previous      Next

---

Provider Served Information			
	City	County/Parish	State
<input type="checkbox"/>	Belcher	Caddo	LA
<input type="checkbox"/>	Bethany	Caddo	LA
<input type="checkbox"/>	Blanchard	Caddo	LA
<input type="checkbox"/>	Gilliam	Caddo	LA
<input type="checkbox"/>	Greenwood	Caddo	LA
<input type="checkbox"/>	Hosston	Caddo	LA
<input type="checkbox"/>	Ida	Caddo	LA
<input type="checkbox"/>	Keithville	Caddo	LA
<input type="checkbox"/>	Mooringsport	Caddo	LA
<input type="checkbox"/>	Oil City	Caddo	LA

Selected County: Caddo  
Selected City: ALL

Figure 1-63

## 5.2 ASSESSMENT ADMINISTRATION

An administrator now selects Dynamic Assessment Types for **Call Record**, **Client Record** and **Provider Record**. The **Client Record Assessment** functions the same as the existing assessments in earlier *ServicePoint* versions. **Call Record** assessments apply to *CallPoint* when the provider needs a clean assessment for each call. **Client Record Assessments** can still be used in *CallPoint*. **Provider Record Assessments** are under construction. (See Figure 1-64)

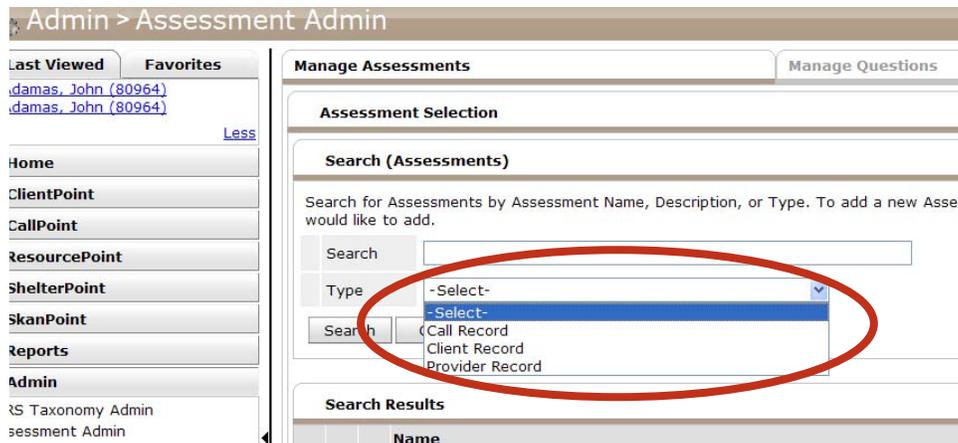


Figure 1-64

## 5.2 LICENSE ADMINISTRATION AND ALLOCATION

*ServicePoint* 5.2 makes a couple of minor updates to license administration. (See Figure 1-65)

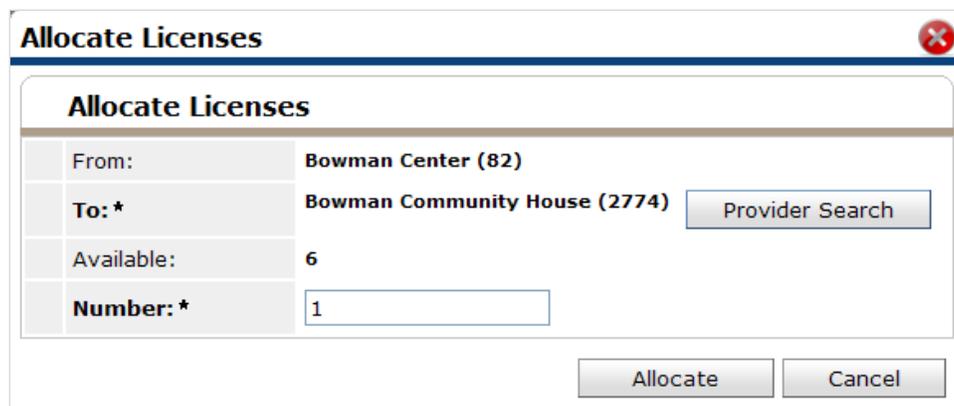


Figure 1-65

- ◆ User creation can occur prior to license purchase.
- ◆ Licenses can be reallocated from one provider to another.