SERVICEPOINT V5.2

EXISTING ADMINISTRATORS' SYSTEM HIGHLIGHTS FOR SOFTWARE UPGRADES

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)

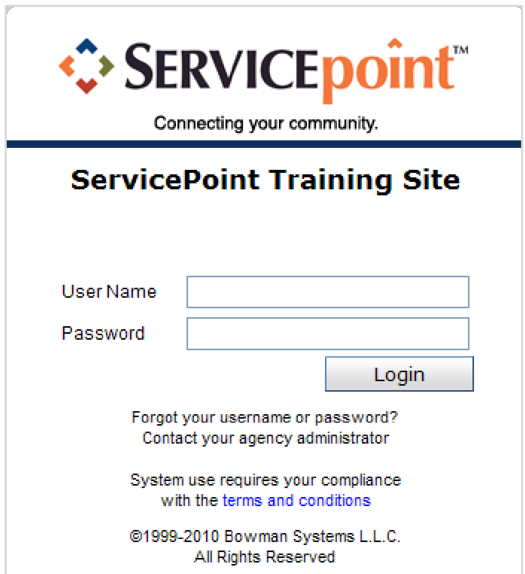

Figure 1-1

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)

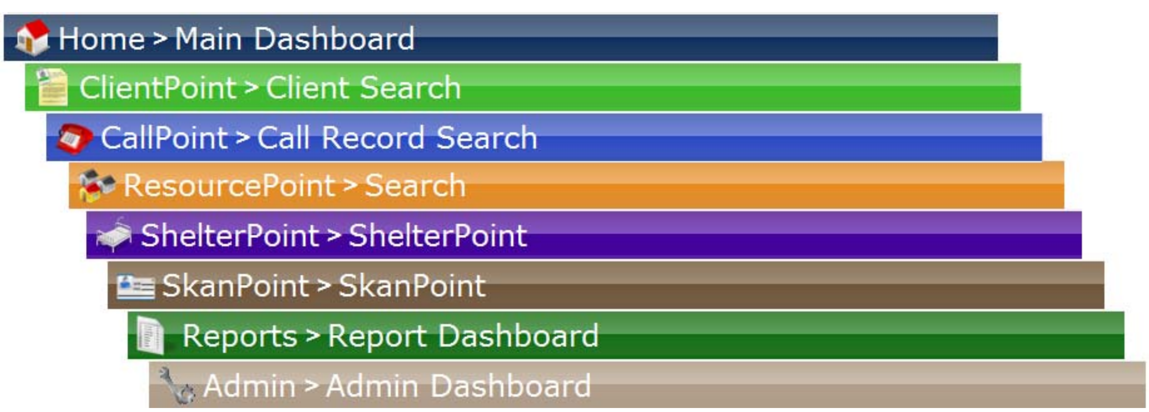

Figure 1-2

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

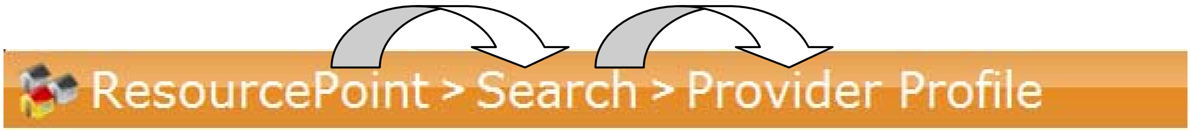

Figure 1-3

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)

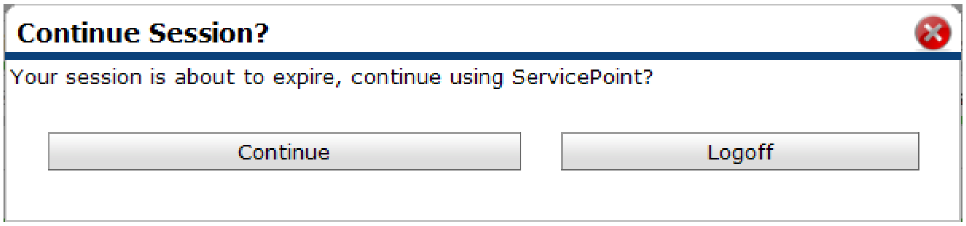

Figure 1-4

5.2 HOME SCREEN

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

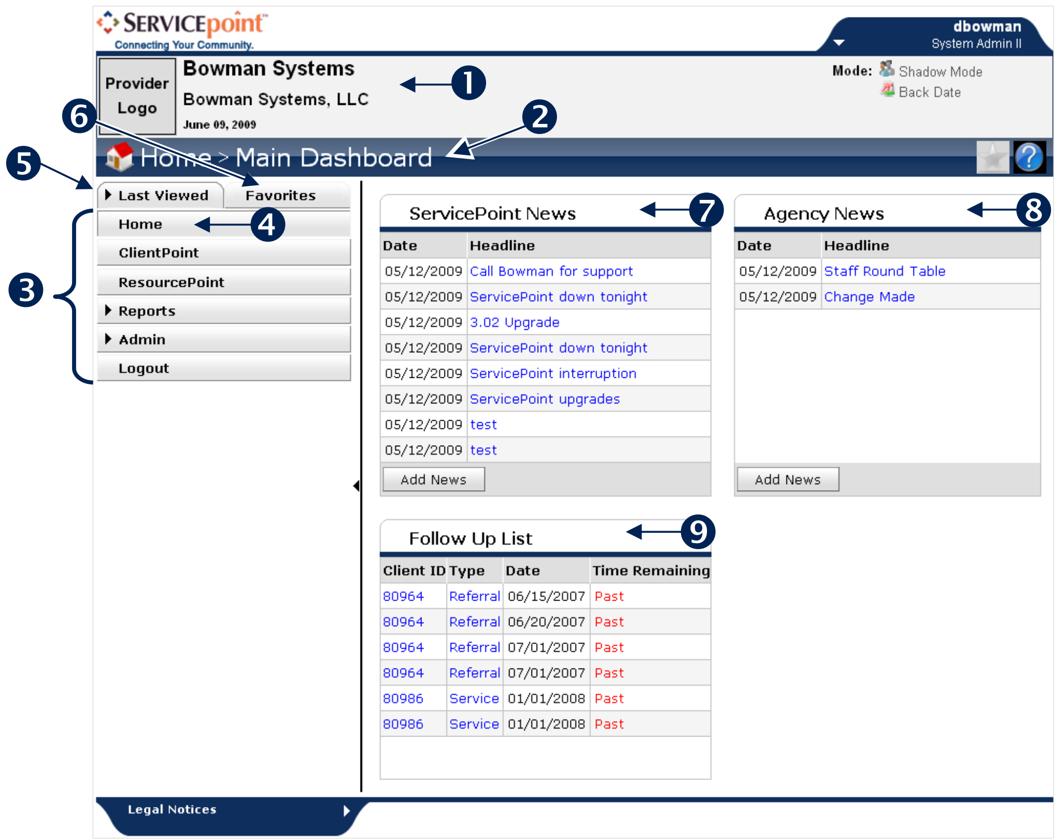

Figure 1-5

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.*

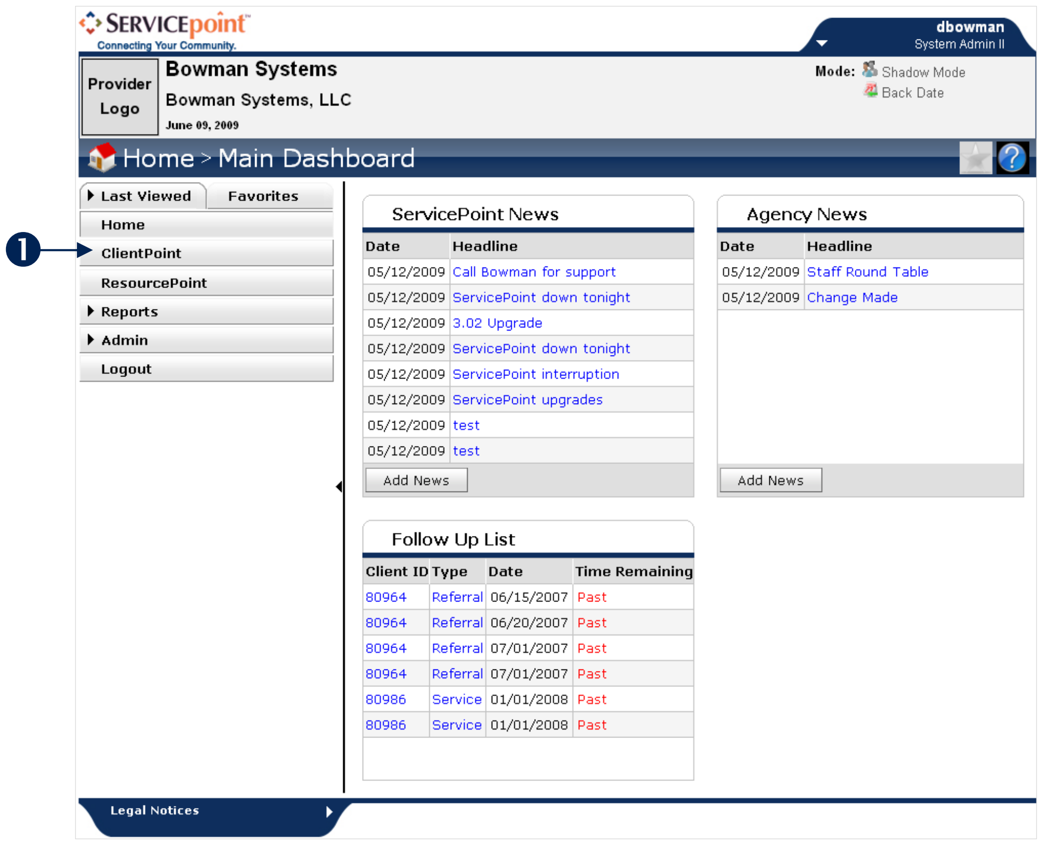

Figure 1-6

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

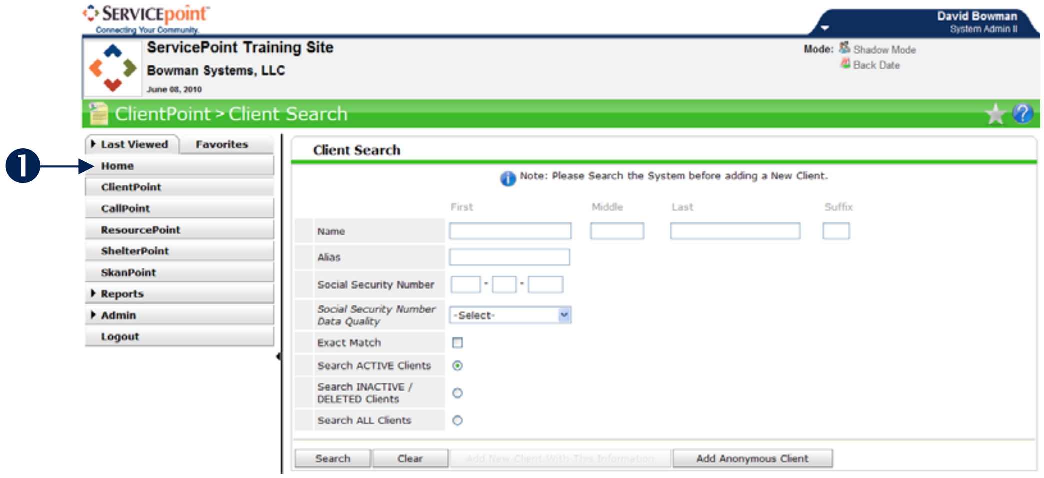

Figure 1-7

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

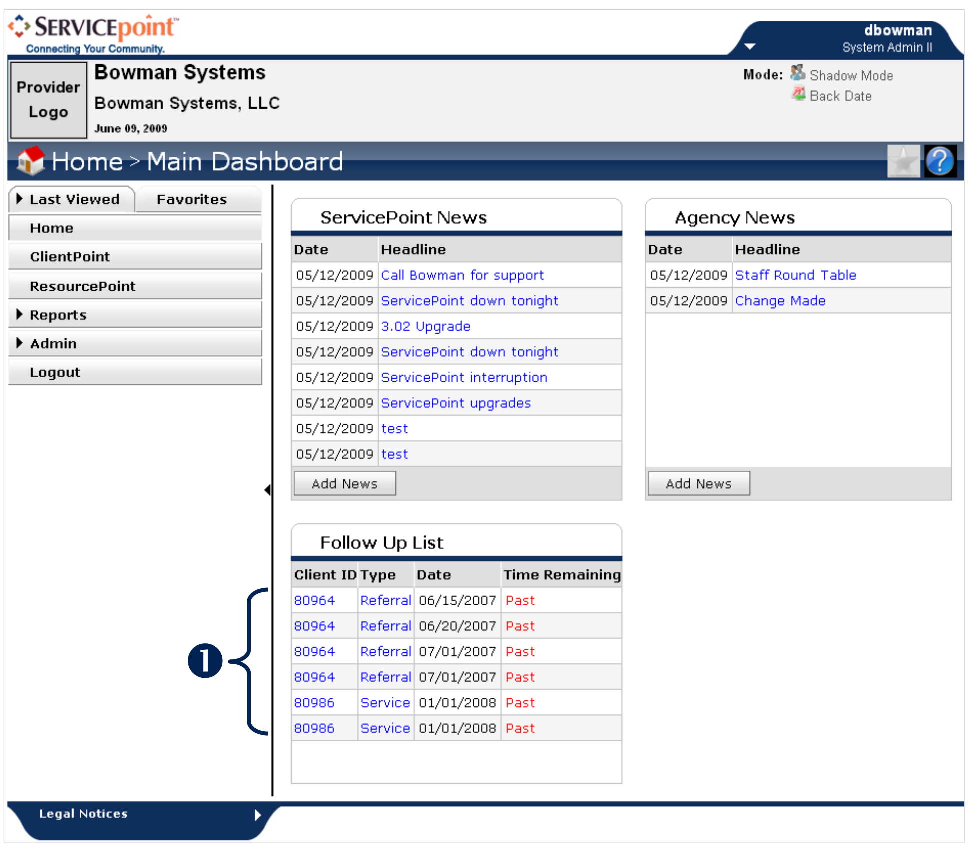

Figure 1-8

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)

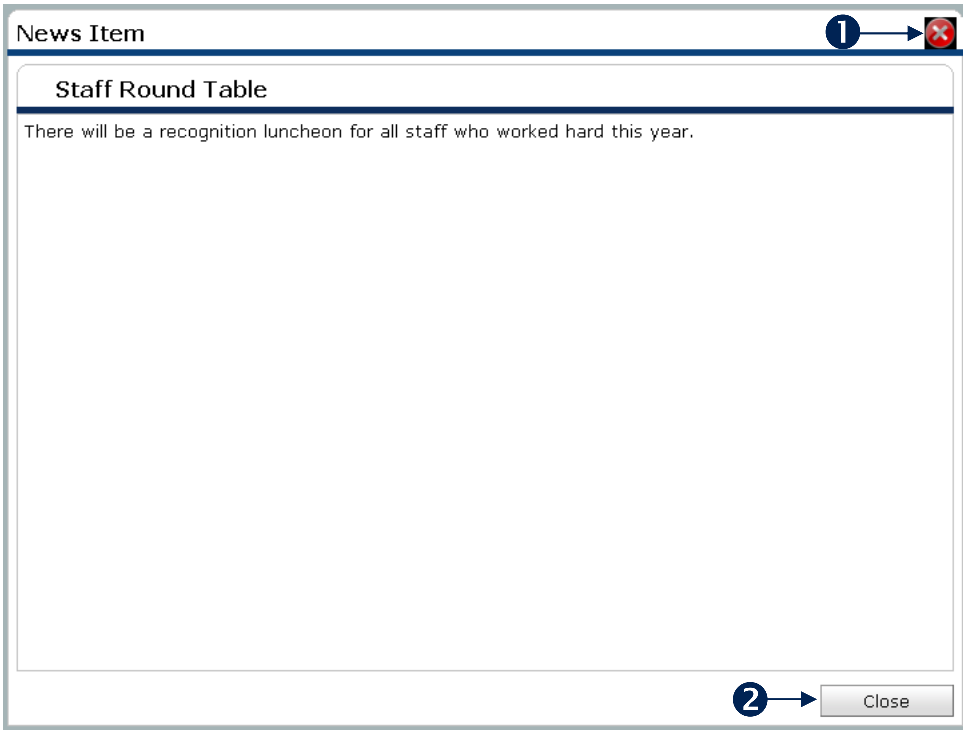

Figure 1-9

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)

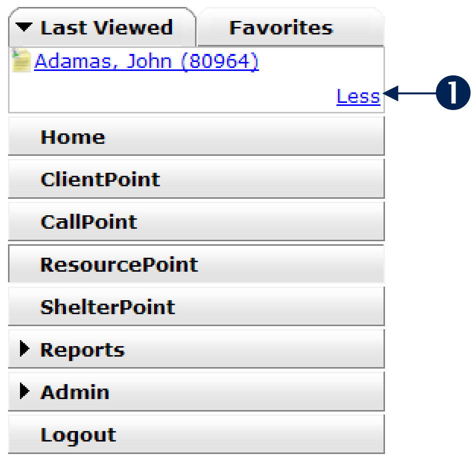

Figure 1-10

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)

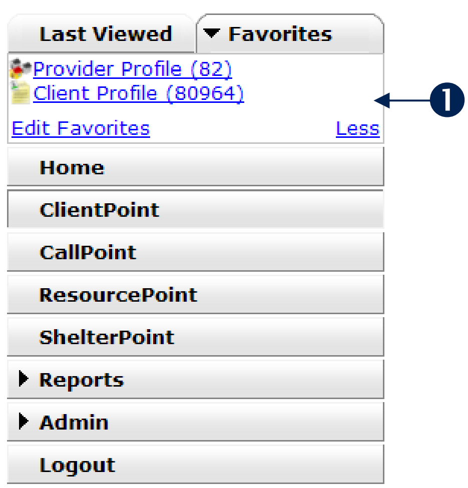

Figure 1-11

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)

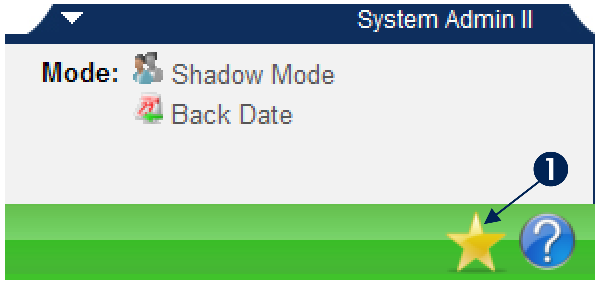

Figure 1-12

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 case 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)

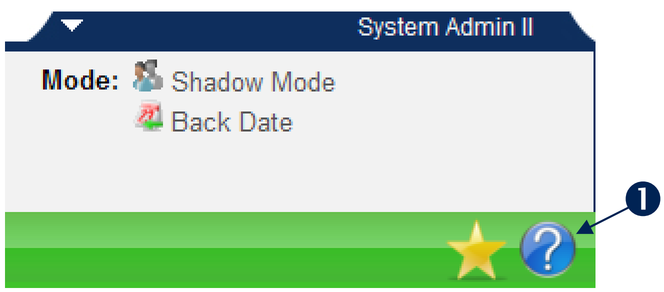

Figure 1-13

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)

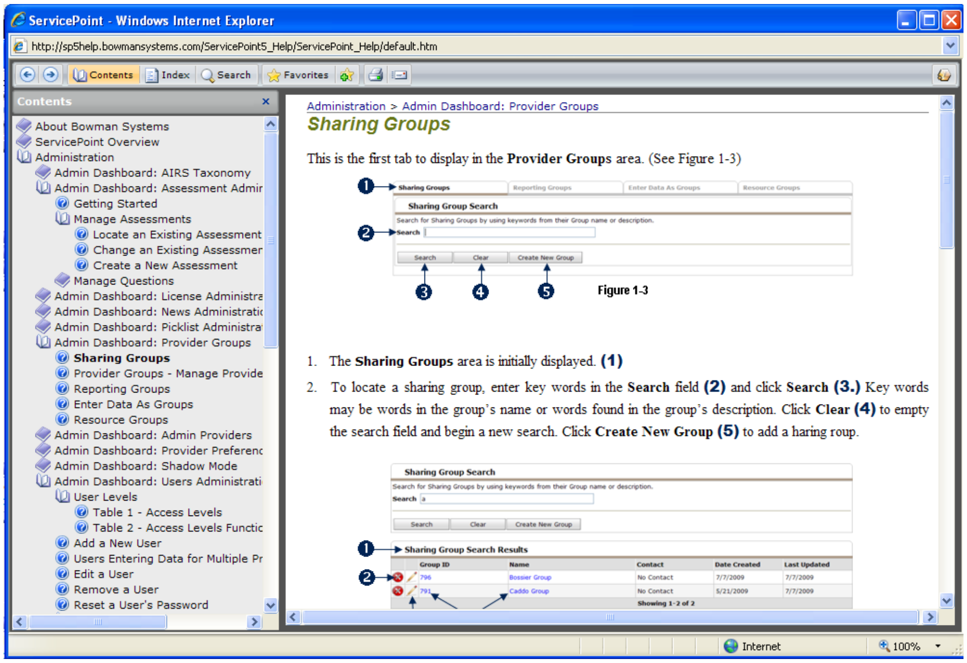

Figure 1-14

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)

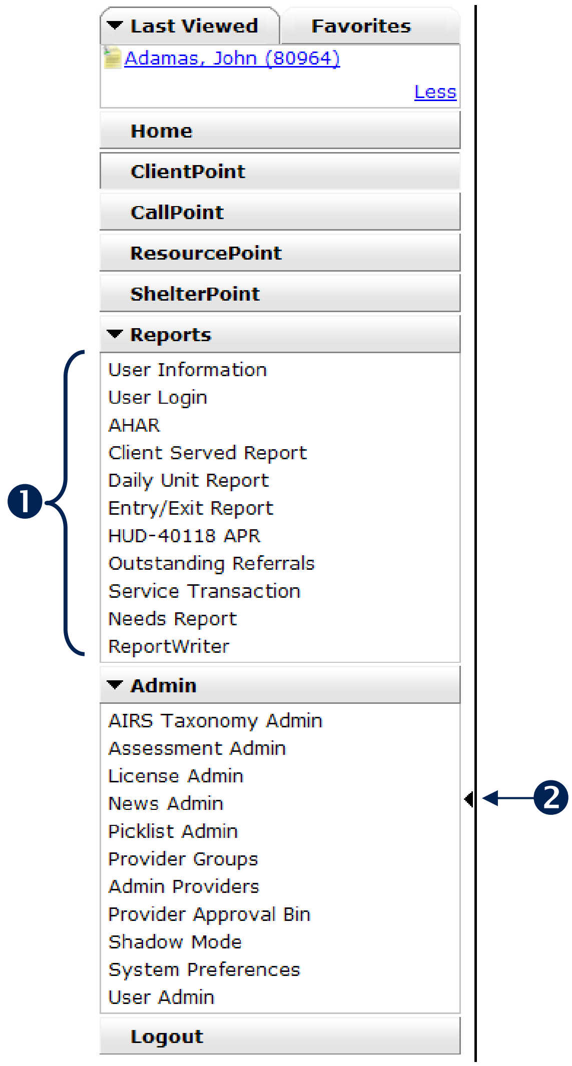

Figure 1-15

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)

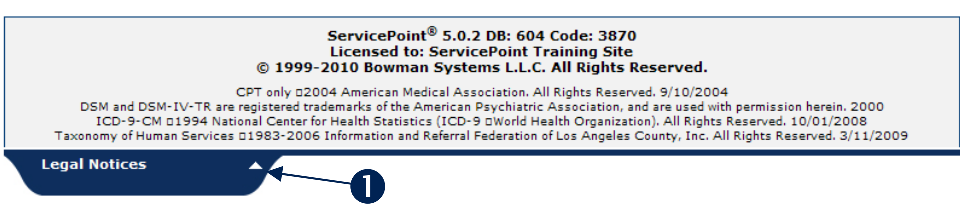

Figure 1-16

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)

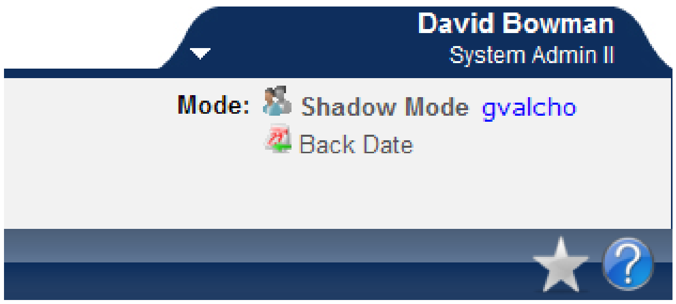

Figure 1-17

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)

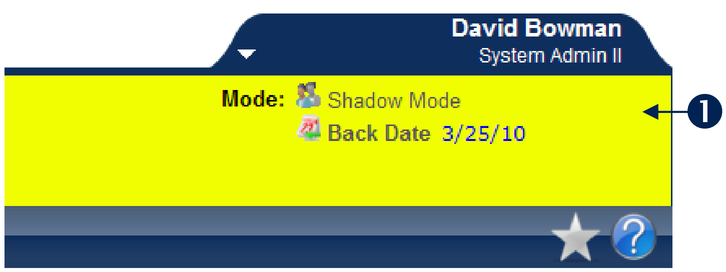

Figure 1-18

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)

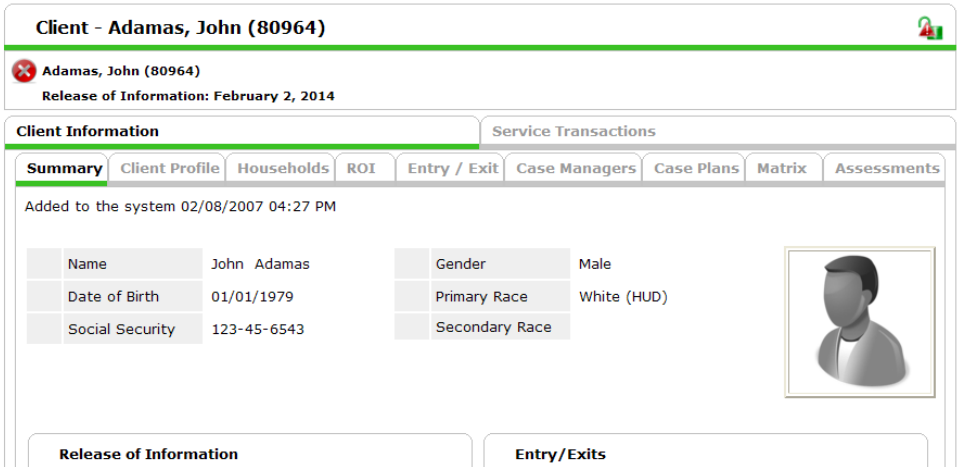

Figure 1-19

- 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)

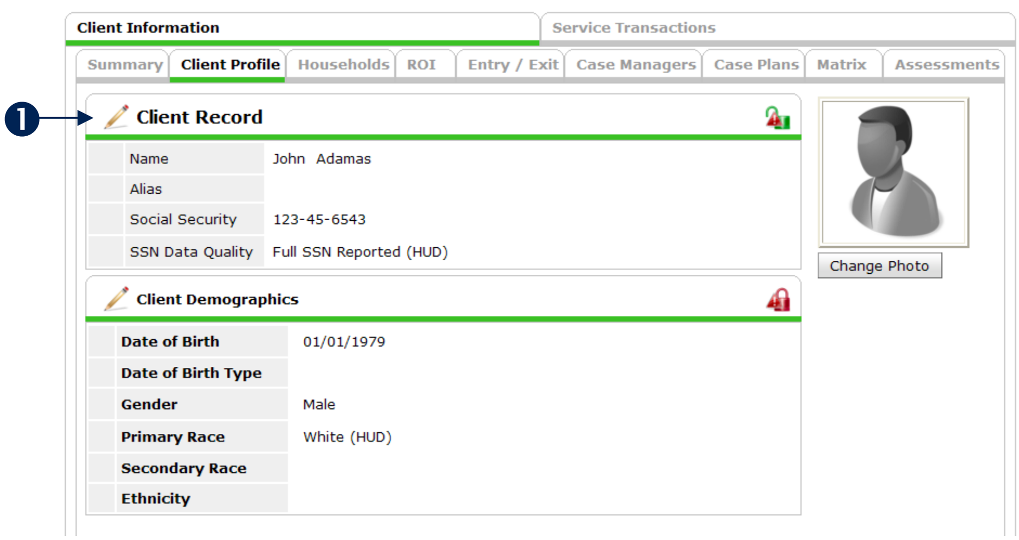

Figure 1-20

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*

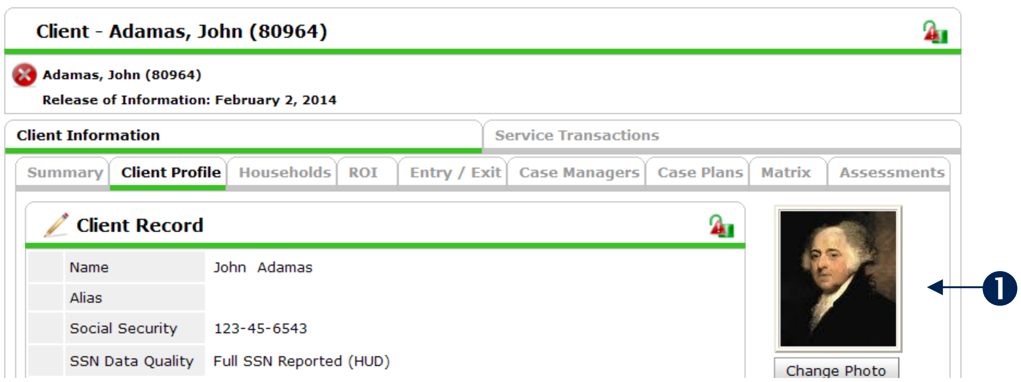

Figure 1-21

- 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)

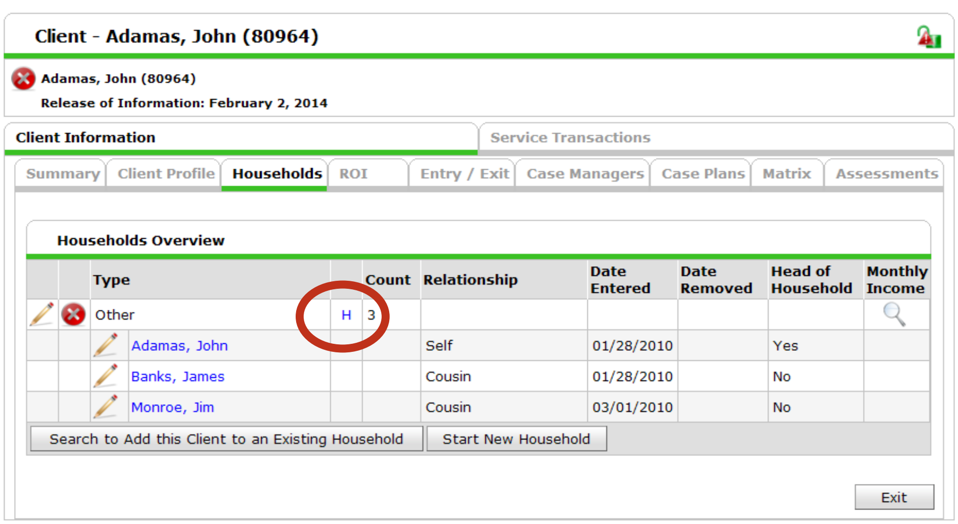

Figure 1-22

- 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)

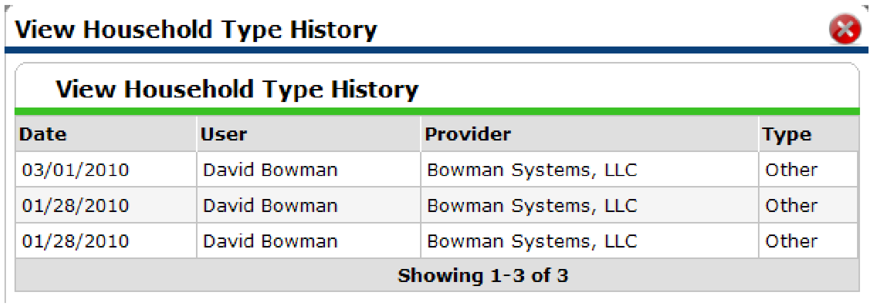

Figure 1-23

- 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)

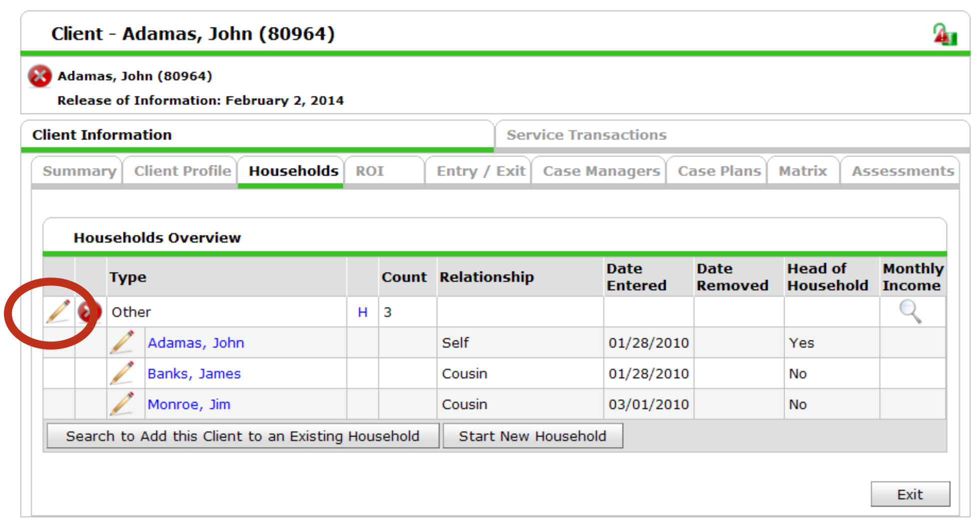

Figure 1-24

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

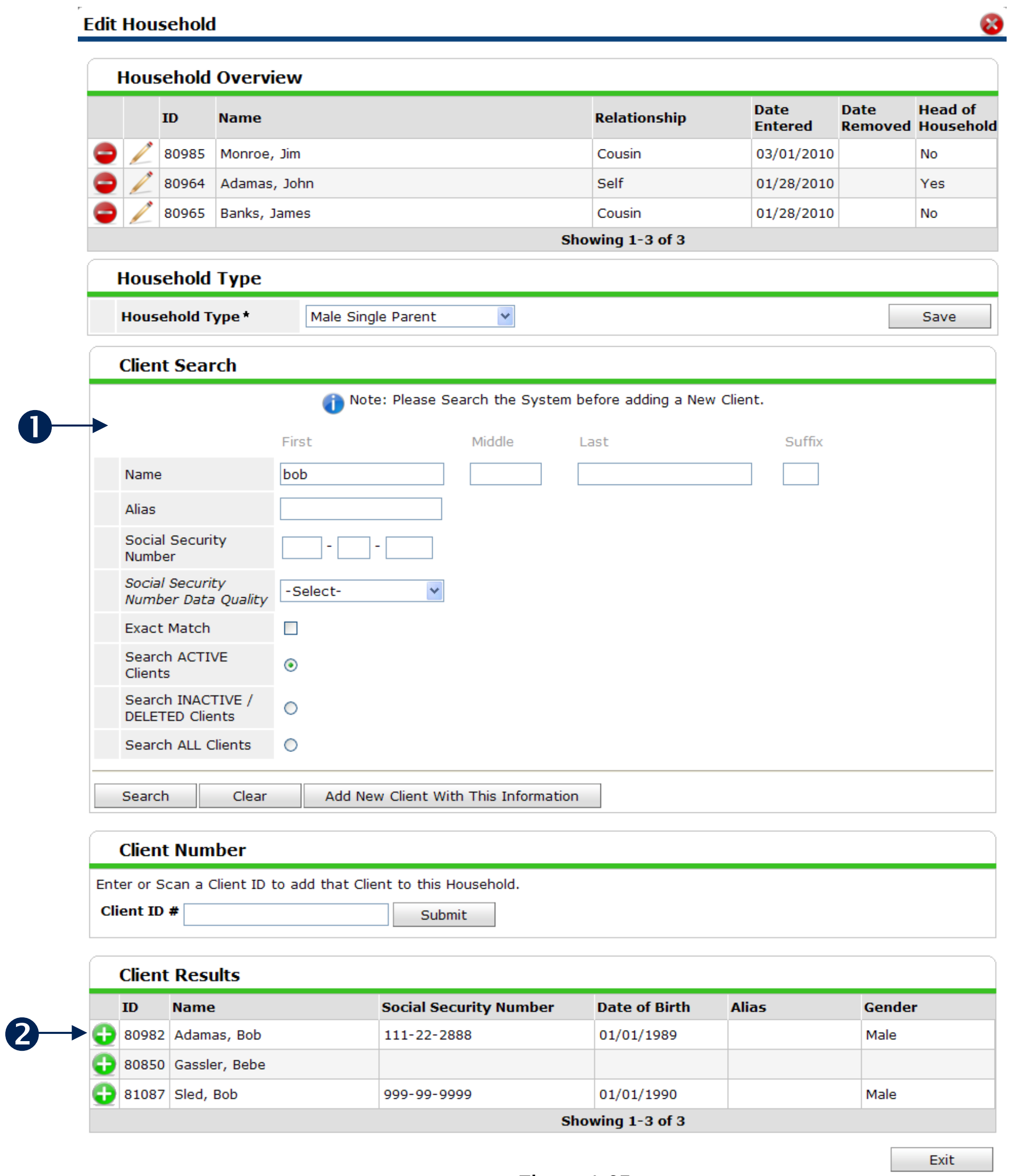

Figure 1-25

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)

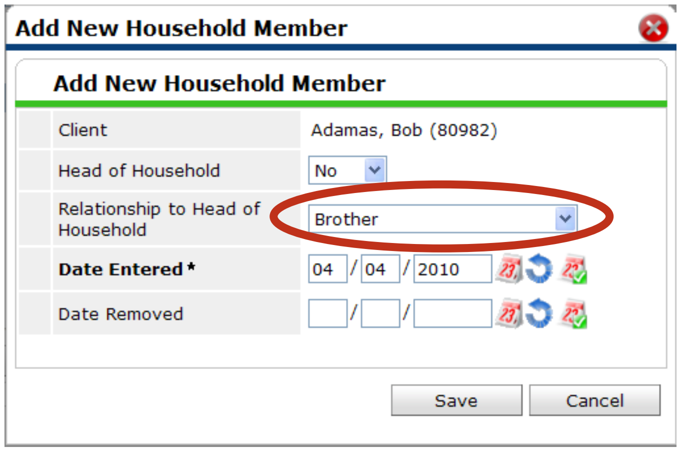

Figure 1-26

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)

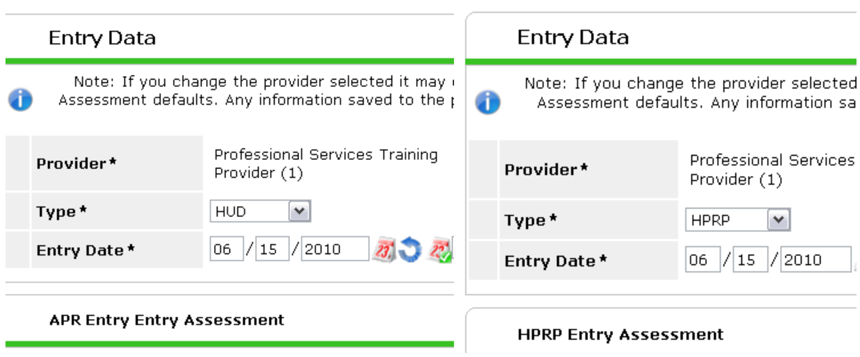

Figure 1-27

- 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)

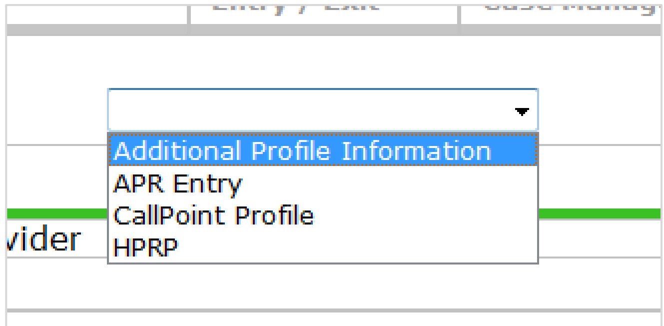

Figure 1-28

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

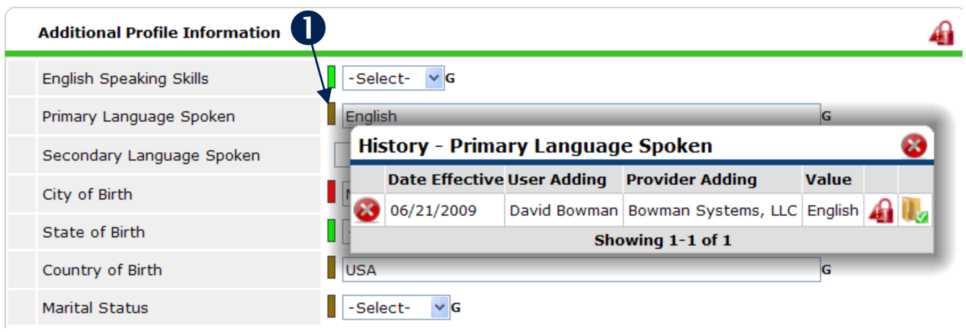

Figure 1-29

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)

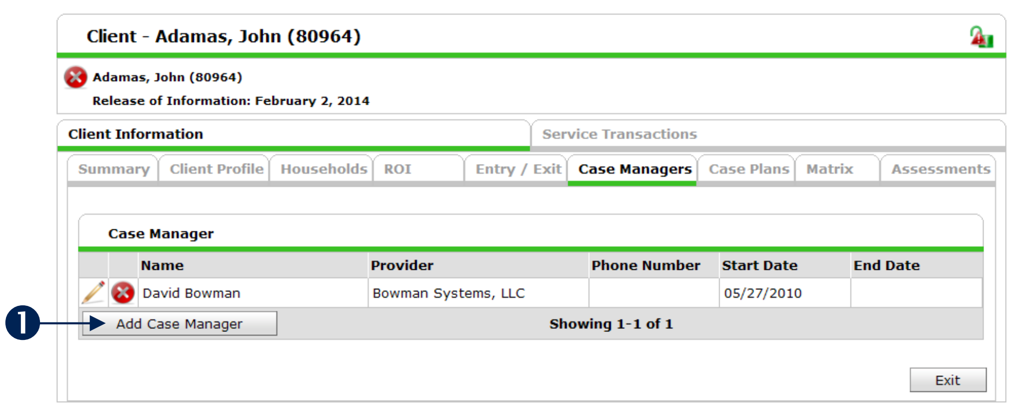

Figure 1-30

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

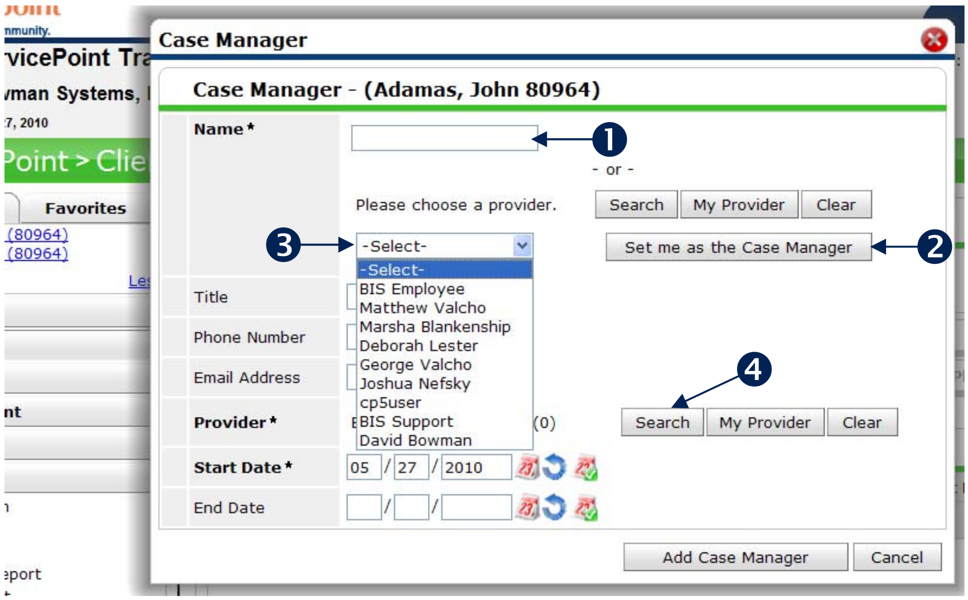

Figure 1-31

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)

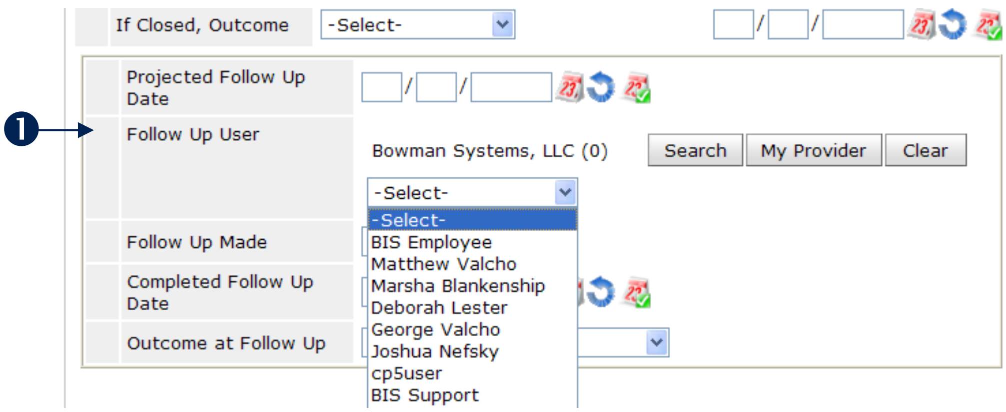

Figure 1-32

- 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)

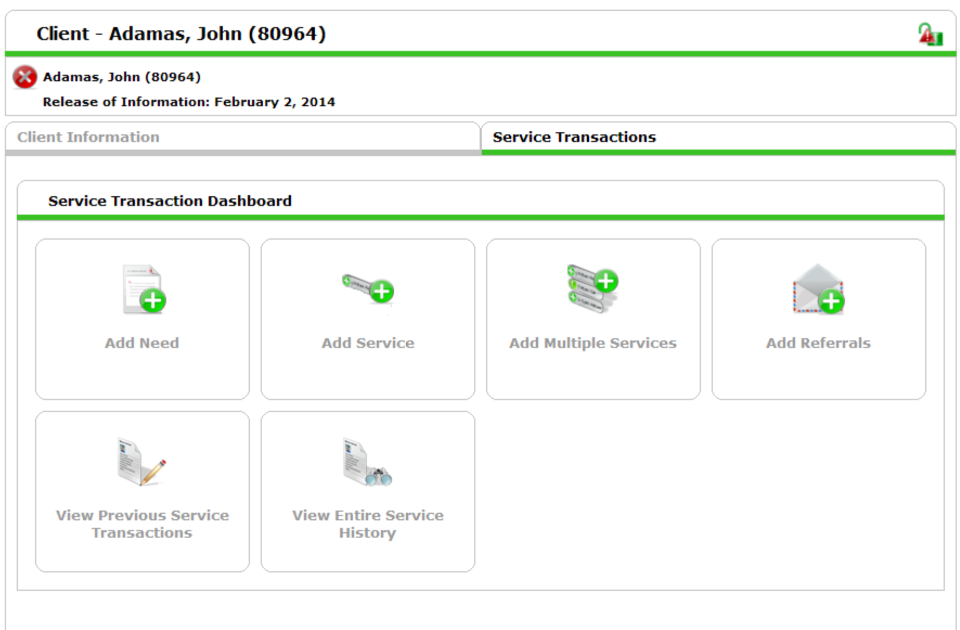

Figure 1-33

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

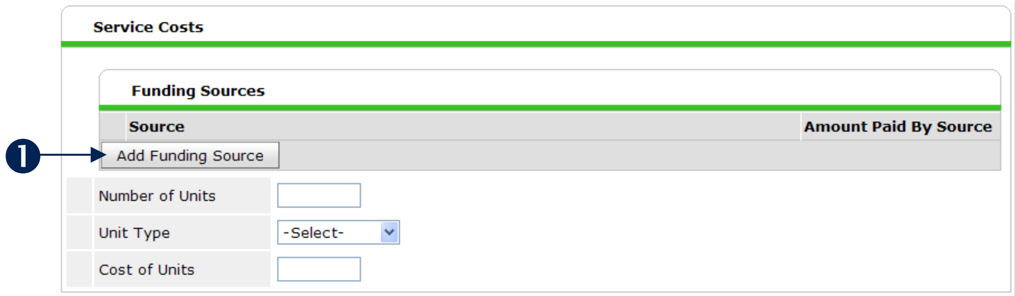

Figure 1-34

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)

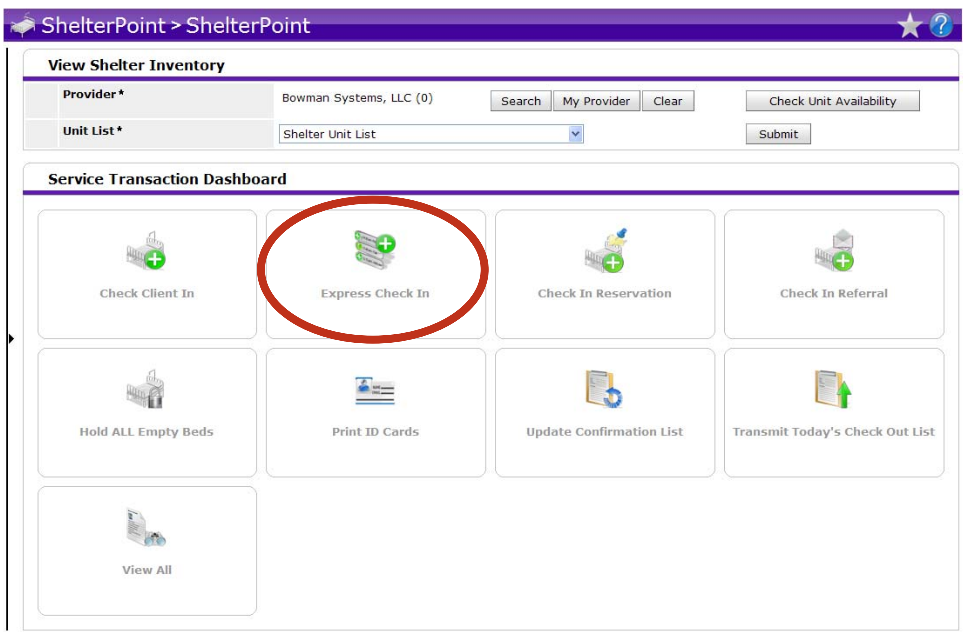

Figure 1-35

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)

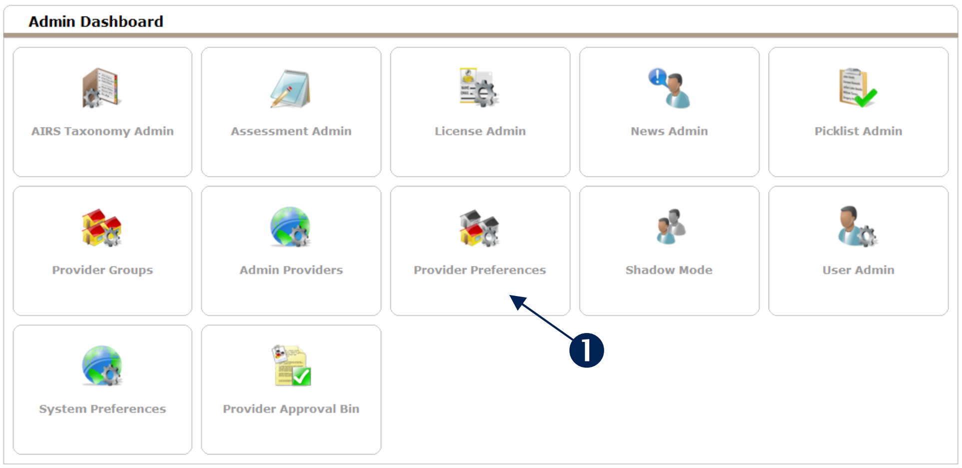

Figure 1-36

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

Figure 1-37

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

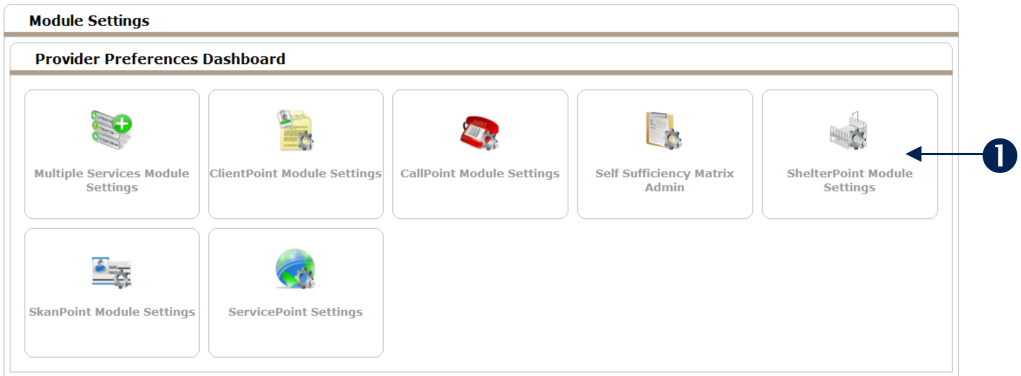

Figure 1-38

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

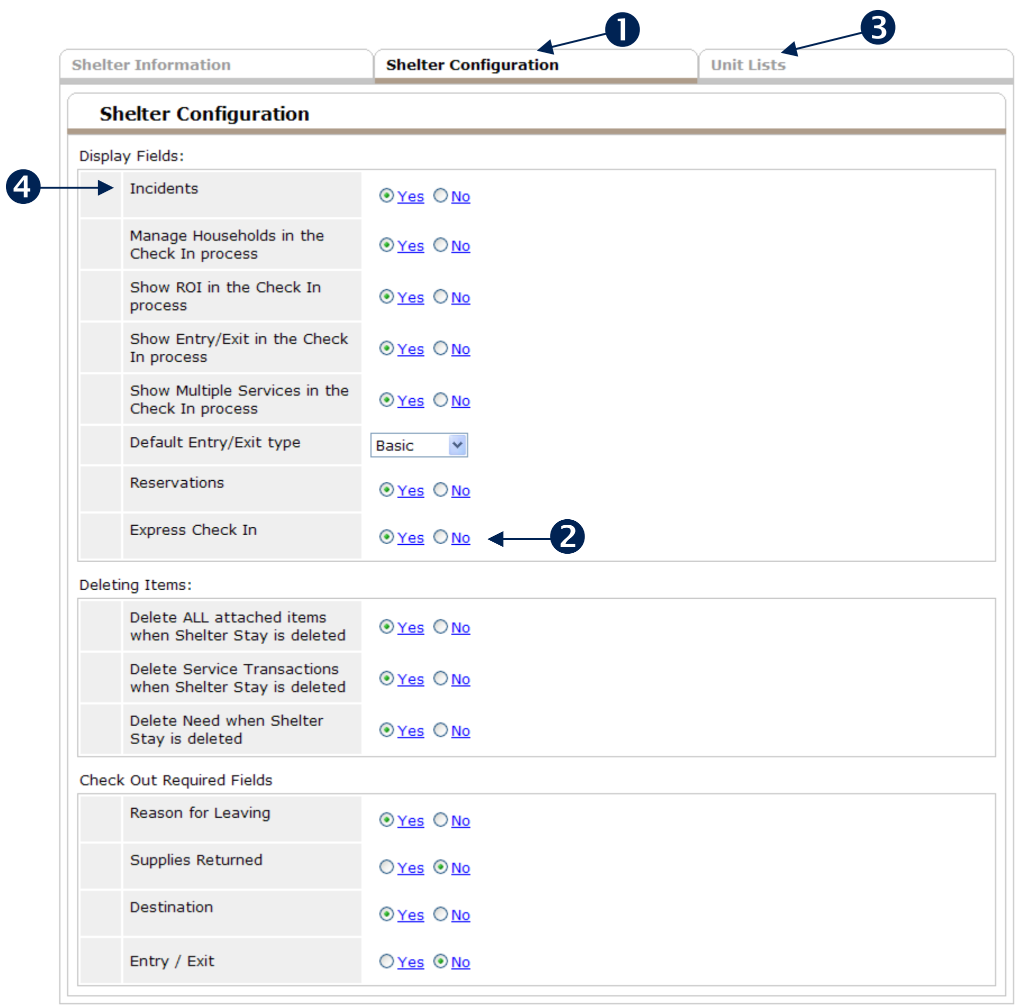

Figure 1-39

4. From the **Shelter Configuration** tab, (1), you can select **Express Check In** as an option to display. (2) The specific details of the unit lists can be managed in the **Unit Lists** tab. (3) Click **Yes** next to Incidents to activate this on the check in screen. (4) (See Figure 1-40)

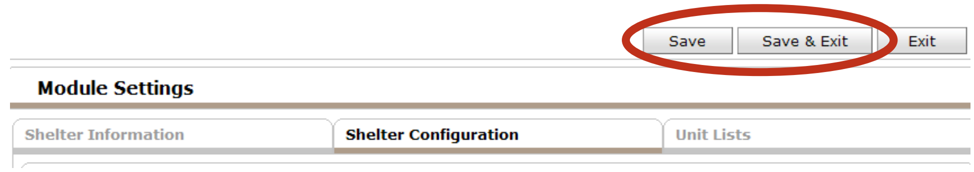

Figure 1-40

5. 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)

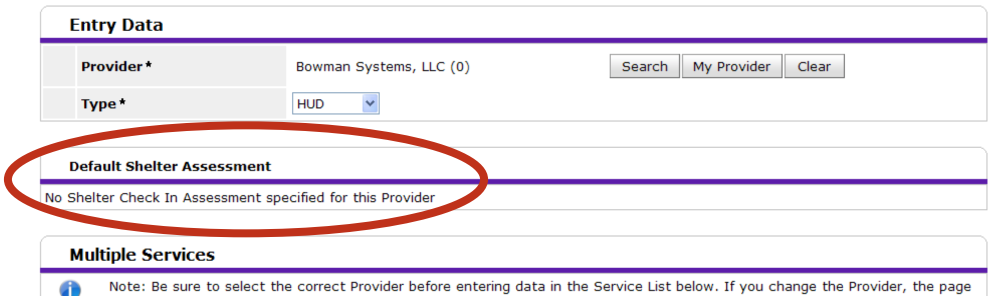

Figure 1-41

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

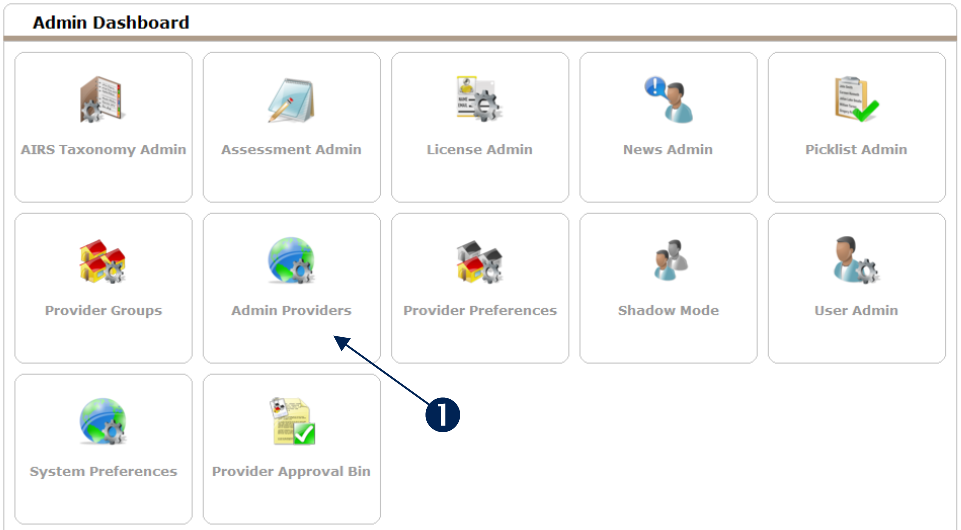

Figure 1-42

1. Click **Admin Providers**. (1) (See Figure 1-43)

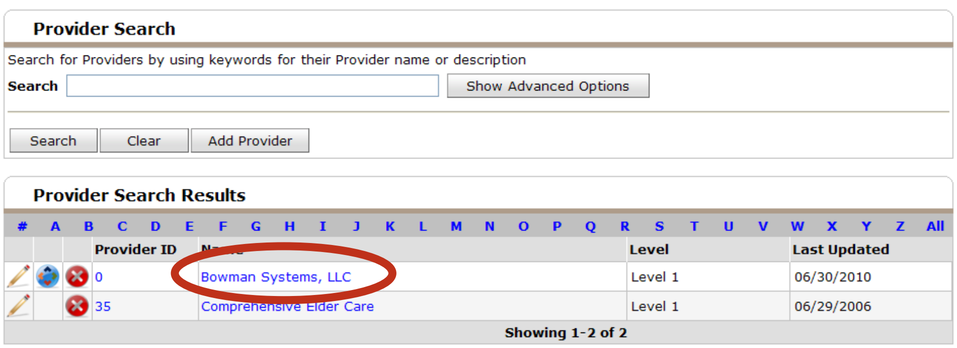

Figure 1-43

2. Search for and select a provider by clicking the provider name or edit icon. (See Figure 1-44)

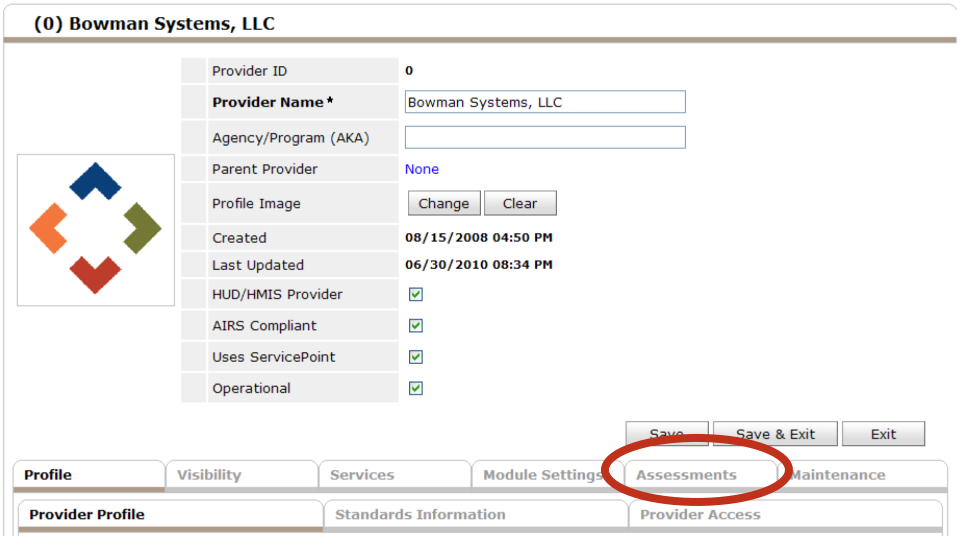

Figure 1-44

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

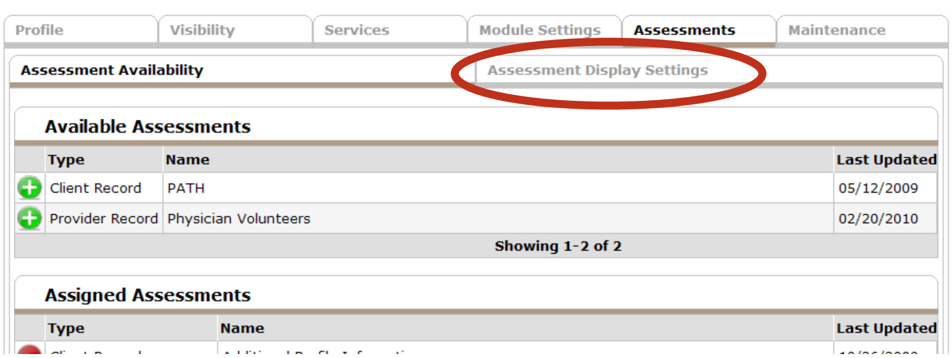

Figure 1-45

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 | Clear

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 First | Previous | Next | Last

Figure 1-47

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

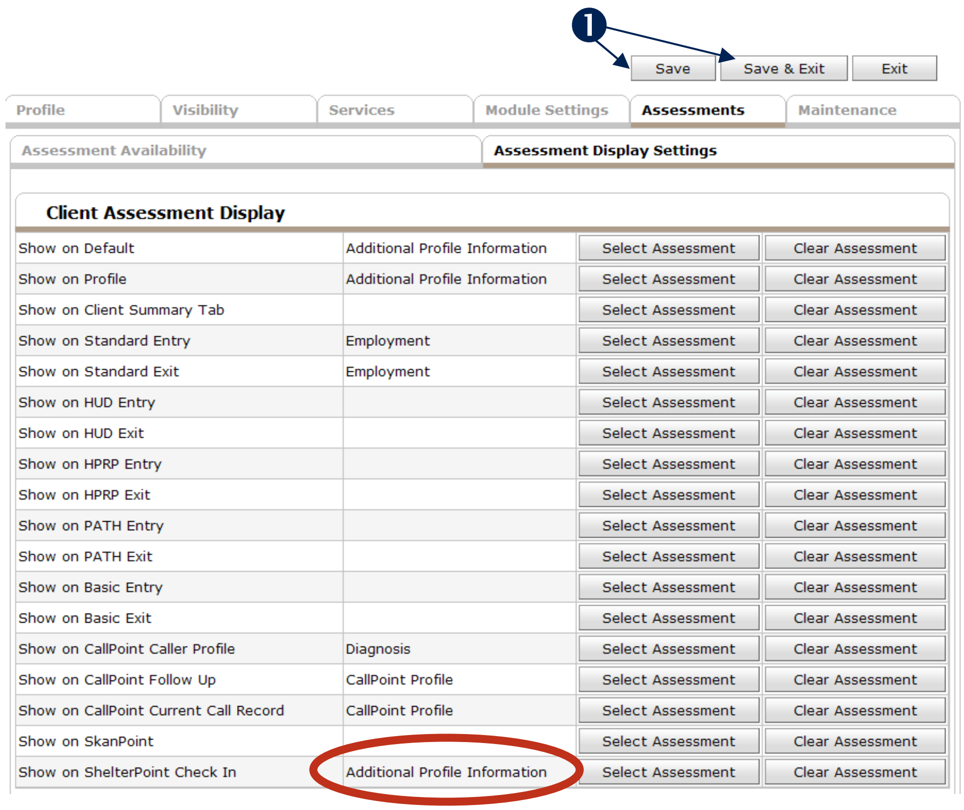

Figure 1-48

7. 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)

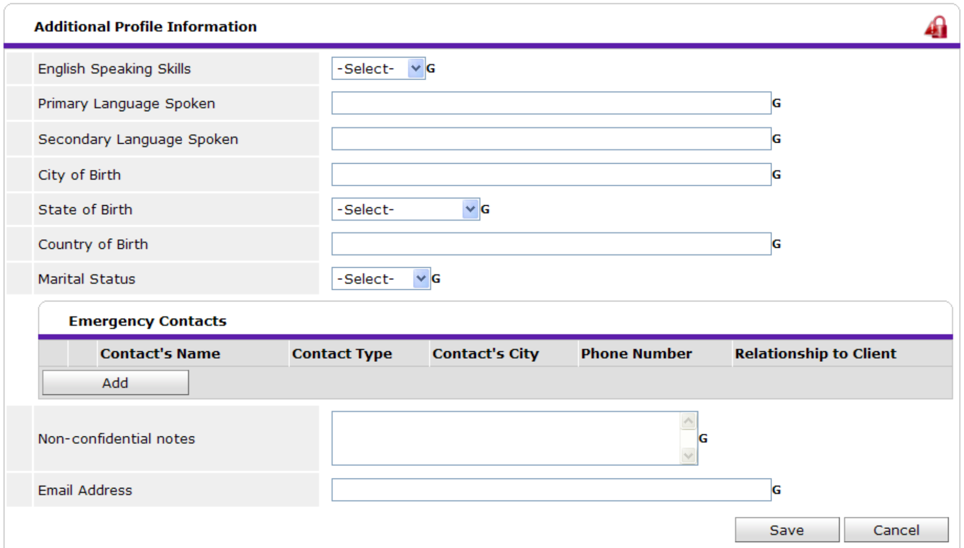

Figure 1-49

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)

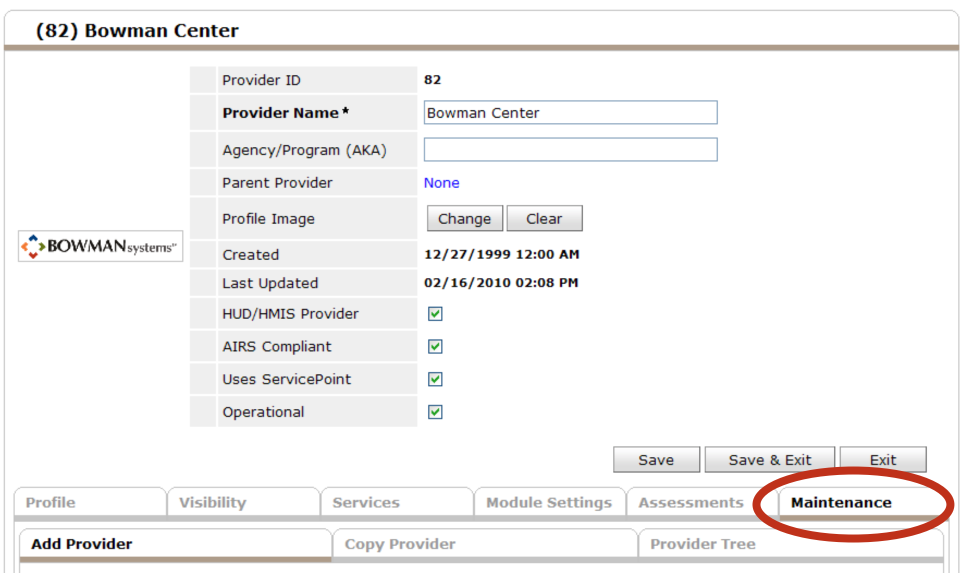

Figure 1-50

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

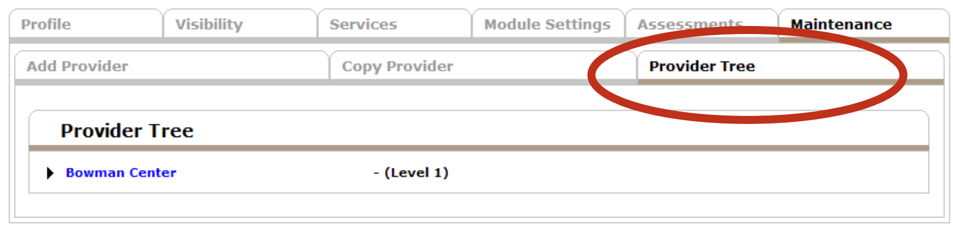

Figure 1-51

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

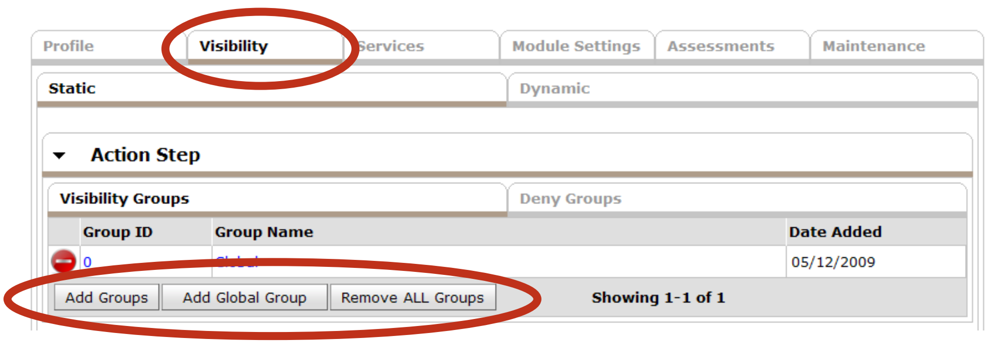

Figure 1-52

- 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.* 

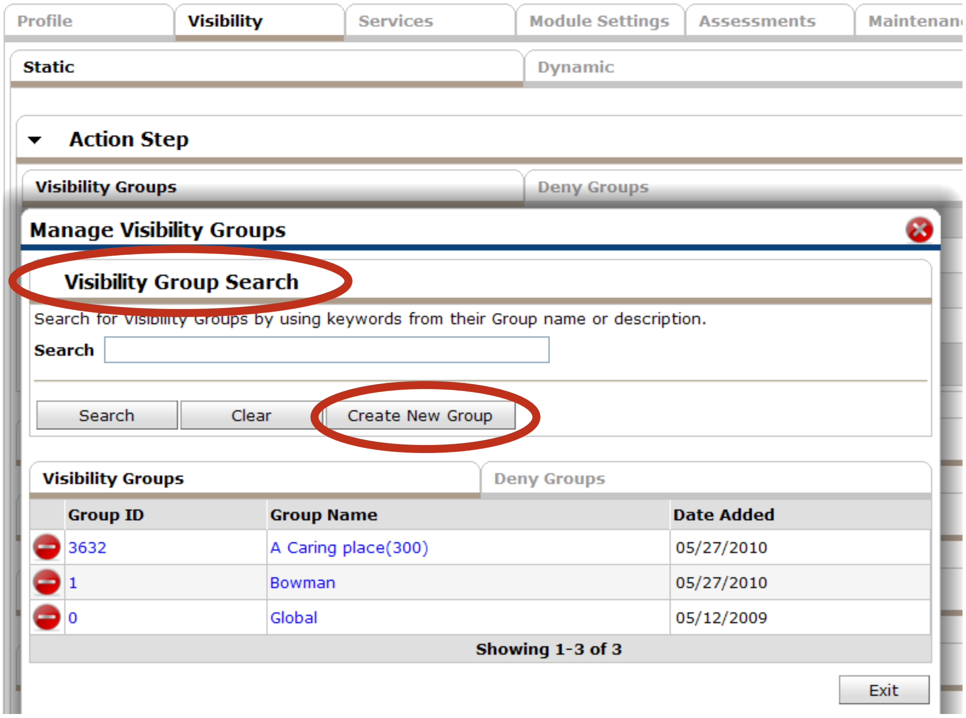

Figure 1-53

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

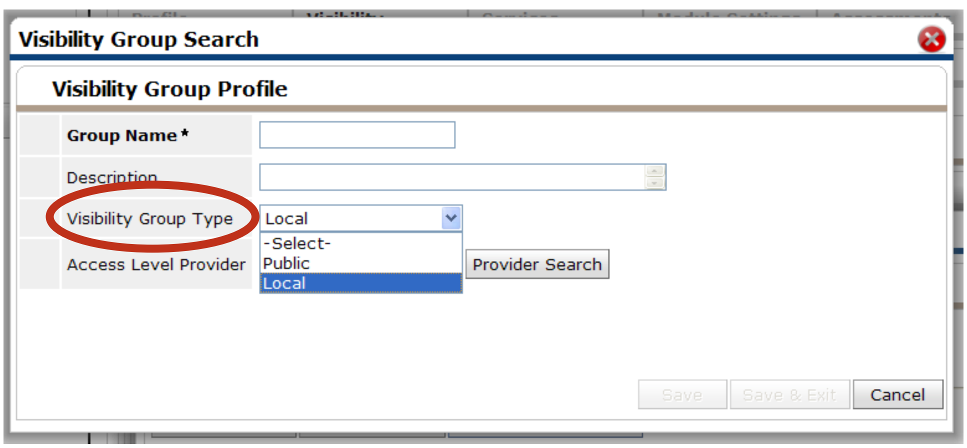

Figure 1-54

- 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)

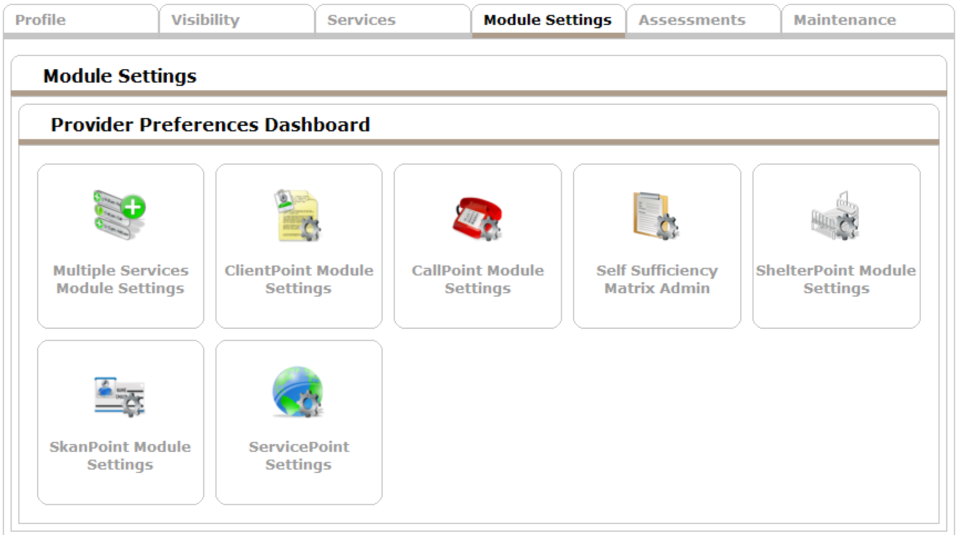

Figure 1-55

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)

Figure 1-56

a: **Editable Case Notes** – When checked this setting allows users to edit **Case Notes** in the **Case Plan** area of *ServicePoint*.

b: **Manage Anonymous Clients** – When checked this setting allows anonymous clients to be added to the *ServicePoint* database.

c: **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.

d: **Manage Unnamed Clients** – When checked this setting allows unnamed clients to be added to the *ServicePoint* database.

e: **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: **SkanPoint Module Installed** – When checked this setting informs the *ServicePoint* application that *SkanPoint* 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.

5.2 User Admin

There are a number of noteworthy settings in the **User Administration** area. (See Figure 1-57)

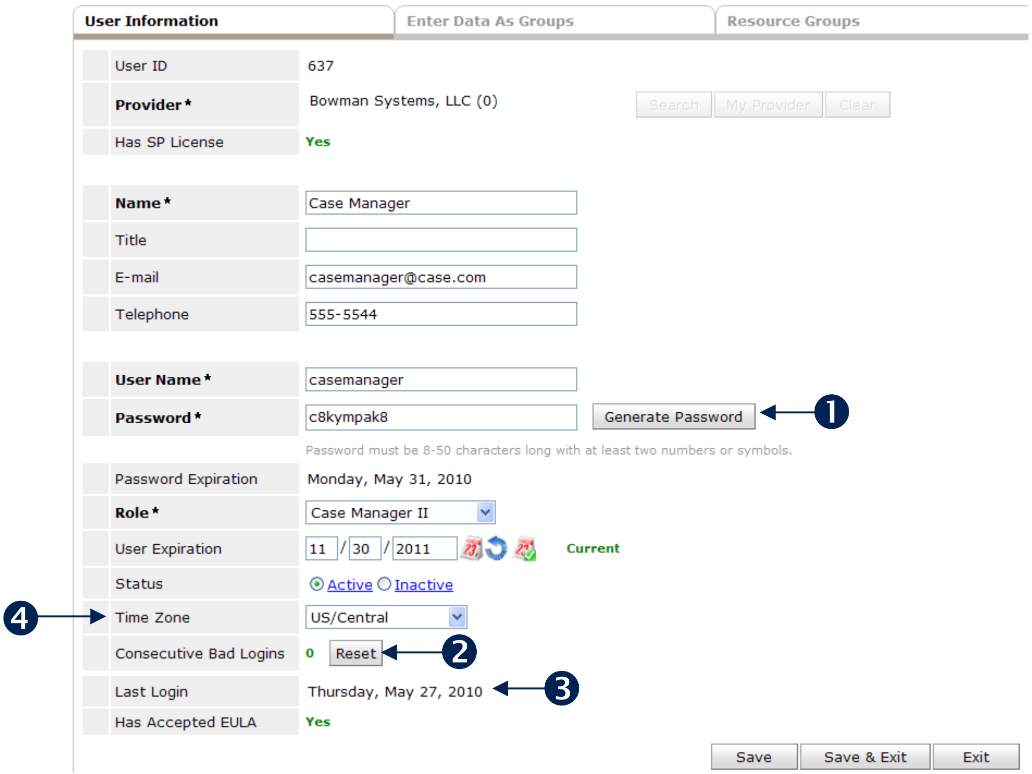

Figure 1-57

- The **Password** for a new user can be set by the administrator. (1)
- Administrators now have a **Reset** button for consecutive bad logins. (2) The user is still bumped to "inactive" status when entering the incorrect password 3 times. However, the new functionality allows the System Administrator to reset logins prior a user actually inactivating their password.
- **Last Login** date is now a field on the user information page. (3) Audit reports are available for user Login utilizing this field.
- User **Time Zone** can be selected. (4)
- User **License** can be assigned in 2 places. At the bottom of the user information page, or from **License Administration**.
  - From **User Information Page** (licenses must be allocated to the provider before adding) (See Figure 1-58)

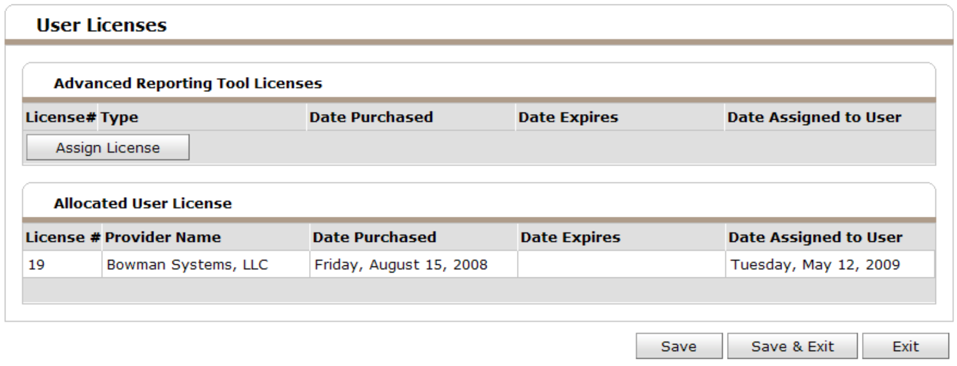

Figure 1-58

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

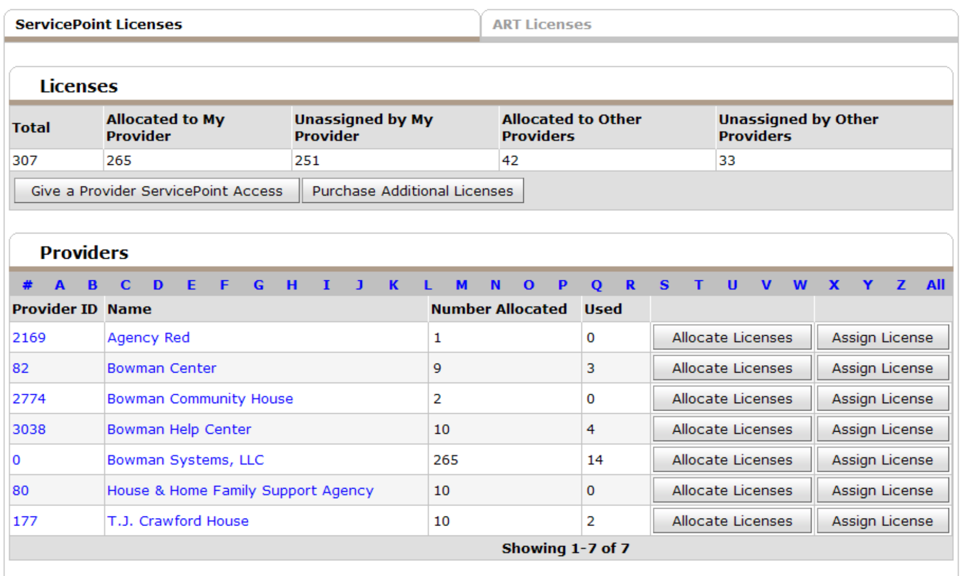

Figure 1-59

5.2 Provider Groups

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

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)

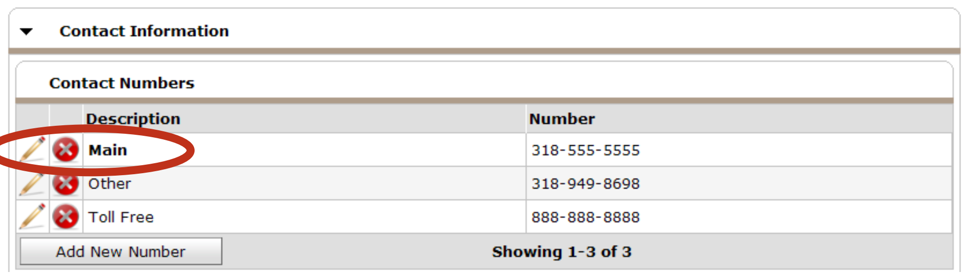

Figure 1-61

- 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)

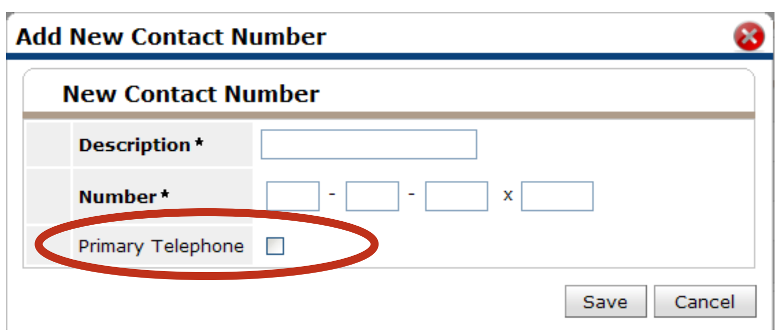

Figure 1-62

- **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.

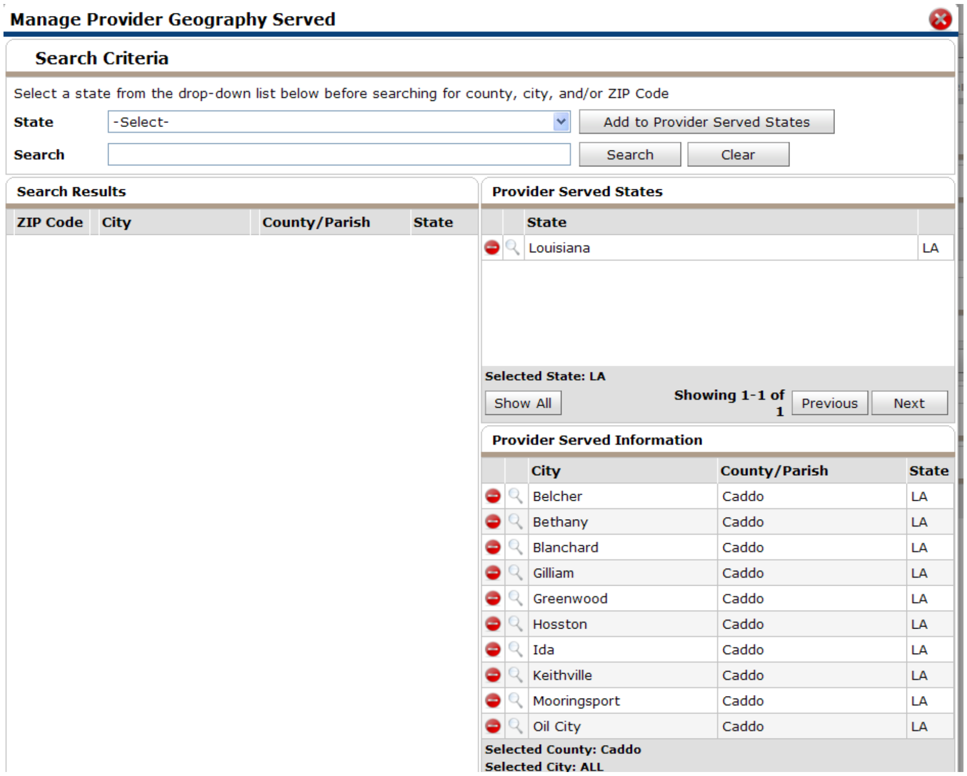
Manage Provider Geography Served
Search Criteria
Select a state from the drop-down list below before searching for county, city, and/or ZIP Code
State
-Select-
Add to Provider Served States
Search
Search
Clear
Search Results
ZIP Code
City
County/Parish
State
Provider Served States
State
Louisiana
LA
Selected State: LA
Show All
Showing 1-1 of 1
Previous
Next
Provider Served Information
City
County/Parish
State
Belcher Caddo LA
Bethany Caddo LA
Blanchard Caddo LA
Gilliam Caddo LA
Greenwood Caddo LA
Hosston Caddo LA
Ida Caddo LA
Keithville Caddo LA
Mooringsport Caddo LA
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)

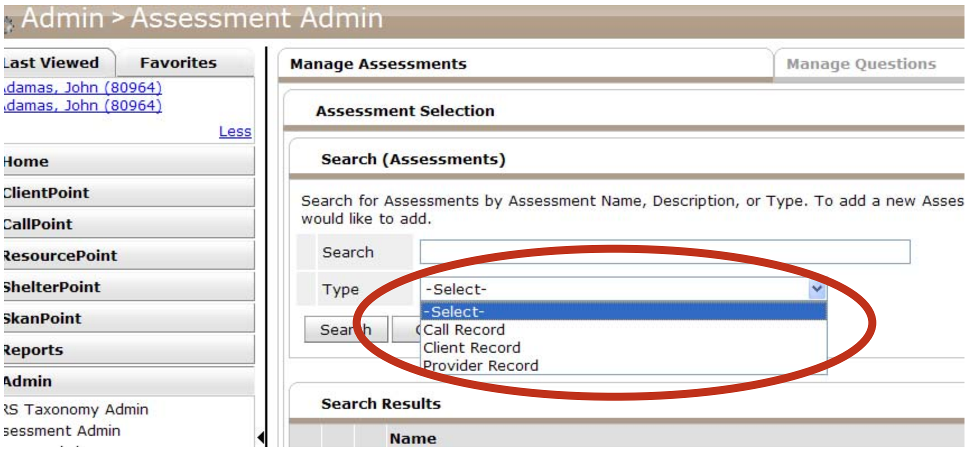

Figure 1-64

5.2 License Administration and Allocation

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

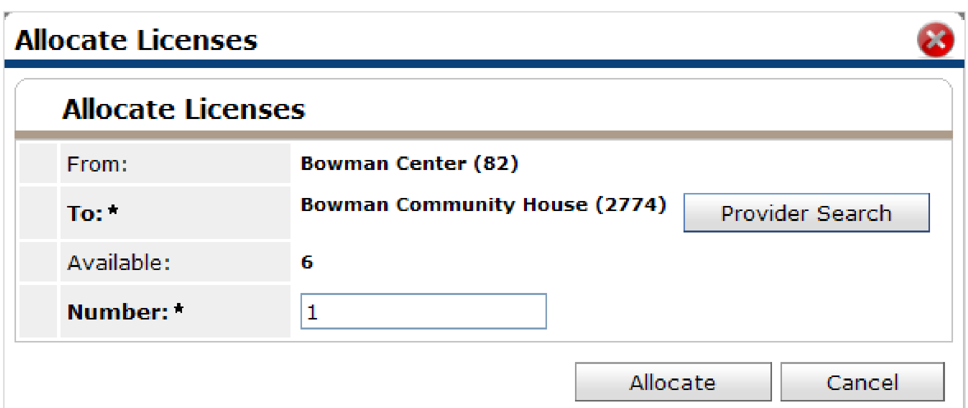

Figure 1-65

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