



How-To Guide

ServicePoint 4.04

- **ClientPoint** -

Creating Client and Household Records

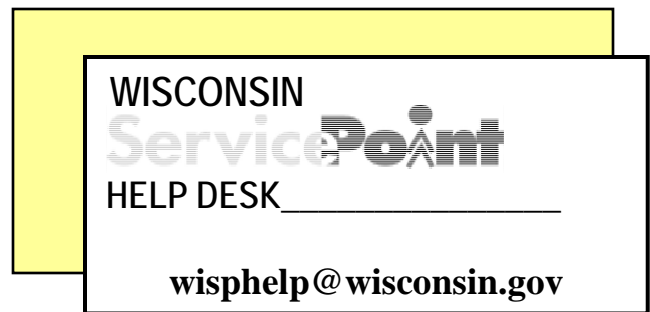


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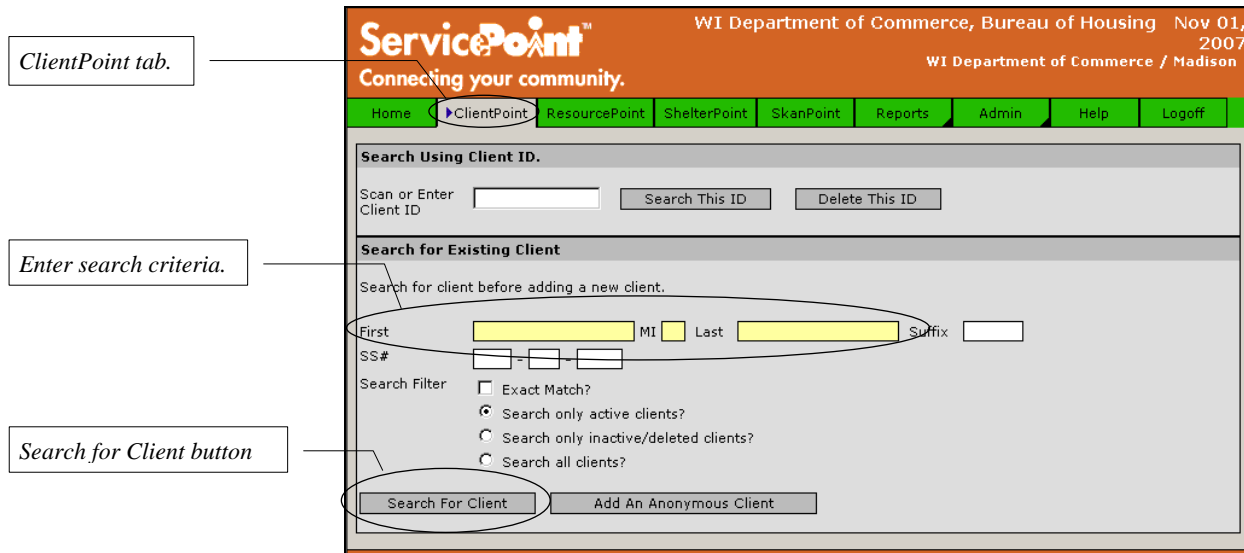
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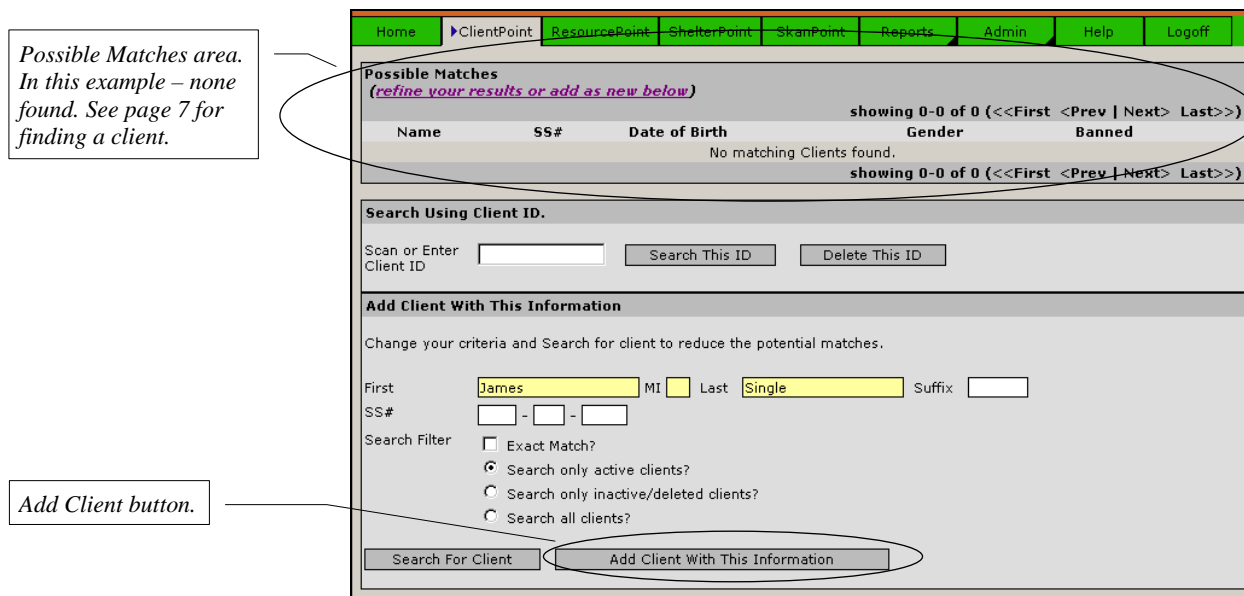
✪ **Create a client/household record**

Record creation happens in the ClientPoint area of ServicePoint.

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



3. If client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client with this Information button.



4. On the client profile page, enter the date that the information was collected into the Assessment Date field and click the Back Date button. (This is a very important step. Always change the date to reflect the date that the information was COLLECTED.)
5. Complete the Required Universal Data Elements for this client and click the Save Changes button.
 - IF this client is a Single, proceed with step 6. IF this client is a member of a household go to step 7.

Add Household Data button.(see step 6)

VERY IMPORTANT!
Always change this date to reflect when the information was collected and click the Back Date button.

Required Universal Data Elements.

Save Changes button.

Client - Single, James (#5307)
ENTRANCE ID PRO RESOURCE CENTER WORKERS SECURITY

Household Information - 0 Households - Click to Expand

Client Profile

Card Orientation: 1

Added to System Nov 01 2007 12:44PM

First MI Last Suffix

SS# - -

SSN Data Quality

Age

Household Data Sharing

(Backdate Mode) [Return to Live Mode](#)

Required Universal Data Elements

(Backdate Mode) [Return to Live Mode](#)

Assessment Date :

Items in red are HUD universal data elements.

Date of Birth (mm/dd/yyyy) H G

Ethnicity H G

Race H G

Secondary Race (if provided) H G

Gender H G

Is Client U.S. Military Veteran? H G

Do you have a disability of long duration? H G

Required Universal Data Elements

(Backdate Mode) [Return to Live Mode](#)

FOR SINGLE CLIENTS ONLY -----

- Click the Add Household Data button. Complete the remainder of the Required Data Elements for this client and click the Save and Close button. You have created this client's record. To create another record, click the ClientPoint tab.

Required Universal Data Elements.

Save and Close button.

FOR HOUSEHOLDS -----

- For a household you must first create a record for each member of the household by following steps 1-5. Once you have entered the individual records, you will create the household.
- While viewing one of the household member's profiles (it does not matter which one), click to expand the Household Overview section at the top of the screen. And click the Start New Household button.

Household Overview section.

Start New Household button.

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
No Households found for this client.						

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

Start NEW Household button.

Add Client to Household - (Spencer Household)

Household Type: Female Single Parent

Head of Household: No

Relationship to Head of Household: son

Date Entered: 10/15/2007 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Start NEW Household Cancel

- Add all members to the household by using the drop-down profile listing and choosing the name.

Last Profile drop-down.

Add Clients To Household - (Spencer Household)

Overview - Type: Female Single Parent, Current Members: 1 Removed Members: 0

Name	Relationship	Date Entered	Date Removed	Head of Household
Household, Spencer (#5310)	son	10/15/2007		No

Household Data Sharing (Backdate Mode) Return to Live Mode Add Household Data

Household Member Information

Head of Household: -Select-

Relationship to Head of Household: -Select-

Date Entered: 11/01/2007 (mm/dd/yyyy)

Add Using Client ID.

Scan or Enter Client ID: Add This ID

Add Additional Clients to Household

"Search for Client" before adding a new client.

Last Profile: -Select-

First: MI Last: Household Suffix:

SS#: - -

Search Filter: Exact Match?

Search For Client Add Client With This Information Add As Anonymous Client Save & Exit

- Answer the fields for the household member and click Add Household Member. Repeat steps 10 and 11 for each member of the household until all members have been added.

Add Household Member.

Add Clients To Household - (Spencer Household)

Overview - Type: Female Single Parent, Current Members: 1 Removed Members: 0

Name	Relationship	Date Entered	Date Removed	Head of Household
Household, Spencer (#5310)	son	10/15/2007		No

Continue Adding Household Member

Client: Household, Sally

Head of Household: Yes

Relationship to Head of Household: Self

Date Entered: 10/15/2007 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Add Household Member Cancel

- Once you have added the last household member, click the Add Household Data button found in the Household Data Sharing bar. (Found on the main profile page or within the Add Clients to Household screen.)

Add Clients To Household - (Spencer Household)

Overview - Type: Female Single Parent, Current Members: 3 Removed Members: 0

Name	Relationship	Date Entered	Date Removed	Head of Household
Household, Samantha (#5309)	daughter	10/15/2007		No
Household, Spencer (#5310)	son	10/15/2007		No
Household, Sally (#5308)	Self	10/15/2007		Yes

Household Data Sharing (Backdate Mode)
Return to Live Mode

Add Household Data

Add Household Data button.

- Click a check mark into those household members that need this information (usually everyone) and answer the Universal Data Elements for the household. These answers will apply to all the checked individuals.

Household members

To include household members in this "Household Assessment", click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

- * Household, Sally
- * Household, Samantha

Household Data Sharing Assessment (Backdate Mode)
Return to Live Mode

Save and Close Exit

Assessment Date: 10/15/2007 12:01 AM Back Date

Items in red are HUD universal data elements.

Is Client Homeless? Yes H G

Is Client Chronically Homeless? No H G

Below indicate where the client spent the night prior to entering your program

Type of Living Situation: Place not meant for habitation (HUD) H G

Length of Stay: One to three months (HUD) H G

Zip Code of Last Permanent Address: 55123 H G

Zip data quality: Full Zip Code Recorded (HUD) H G

Household County Median Income (CMI) Percentage: 0 to 30% CMI H G

Household Data Sharing Assessment (Backdate Mode)
Return to Live Mode

Save and Close Exit

Universal Data Elements.

Save and Close button.

- Click Save and Close. (If your household screen is still open click Save & Exit.)

How-To

🔍 Search For and Update a Record

Updating records happens in the ClientPoint area of ServicePoint.

1. Click the ClientPoint tab to begin.
2. Enter the First and Last name of the client (SS# is optional). The system only uses these three fields to search. (If additional demographic fields appear on this screen, there is no need to complete the fields.)

This screenshot shows the ServicePoint search interface. The top navigation bar includes 'Home', 'ClientPoint', 'ResourcePoint', 'ShelterPoint', 'SkanPoint', 'Reports', 'Admin', 'Help', and 'Logoff'. The 'ClientPoint' tab is selected. Below the navigation bar, there are two main sections: 'Search Using Client ID.' and 'Search for Existing Client'. The 'Search for Existing Client' section contains input fields for 'First' (filled with 'James'), 'MI' (empty), 'Last' (filled with 'Single'), and 'Suffix' (empty). There are also 'SS#' fields and a 'Search Filter' section with radio buttons for 'Exact Match?', 'Search only active clients?' (selected), 'Search only inactive/deleted clients?', and 'Search all clients?'. At the bottom, there are two buttons: 'Search For Client' and 'Add An Anonymous Client'. Callouts from the left point to the 'ClientPoint tab.', the search criteria fields, and the 'Search For Client' button.

3. If client is listed under Possible Matches, click the client's name to proceed to the client's record. If client is not listed under Possible Matches, click the Add Client With This Information button.

This screenshot shows the search results interface. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, there is a 'Possible Matches' section with a table of results. The table has columns for 'Name', 'SS#', 'Date of Birth', 'Gender', and 'Banned'. One result is shown: 'Single, James (#5307)' with SS# '123-45-6789' and Date of Birth '03/20/1962'. Below the table, there is a 'Search Using Client ID.' section and an 'Add Client With This Information' section. The 'Add Client With This Information' section contains the same search criteria fields as in the previous screenshot. At the bottom, there are two buttons: 'Search For Client' and 'Add Client With This Information'. Callouts from the left point to the 'Possible Matches' table and the 'Add Client With This Information' button.

4. On the client's profile page, enter the date that the information was collected into the Assessment Date field and click the Back Date button. (This is a very important step. Always change the date to reflect the date that the information was COLLECTED.) – *see also page 3, step 4.*
5. Complete or correct any of the Required Universal Data Elements for the client. Click Save Changes. – *see also page 3, step 5.*
6. Click the Add Household Data button and complete or correct the remainder of the Required Data Elements. Click Save and Close. – *see also page 4, step 6.*