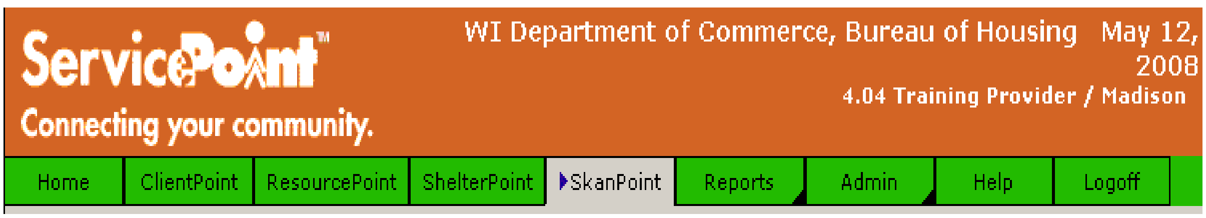
WISCONSIN ServicePoint

How-To Guide

SKANPOINT

WISP SKANPOINT

SkanPoint is designed to record one service for several clients at one time. Agencies can also create Client ID cards and access Client records through the static ID number. Using the Client ID is a quick and precise method for accessing clients information. The agency has the choice of either scanning a Client ID card or manually entering a Client ID number. To access SkanPoint click on the tab at the top of the page.

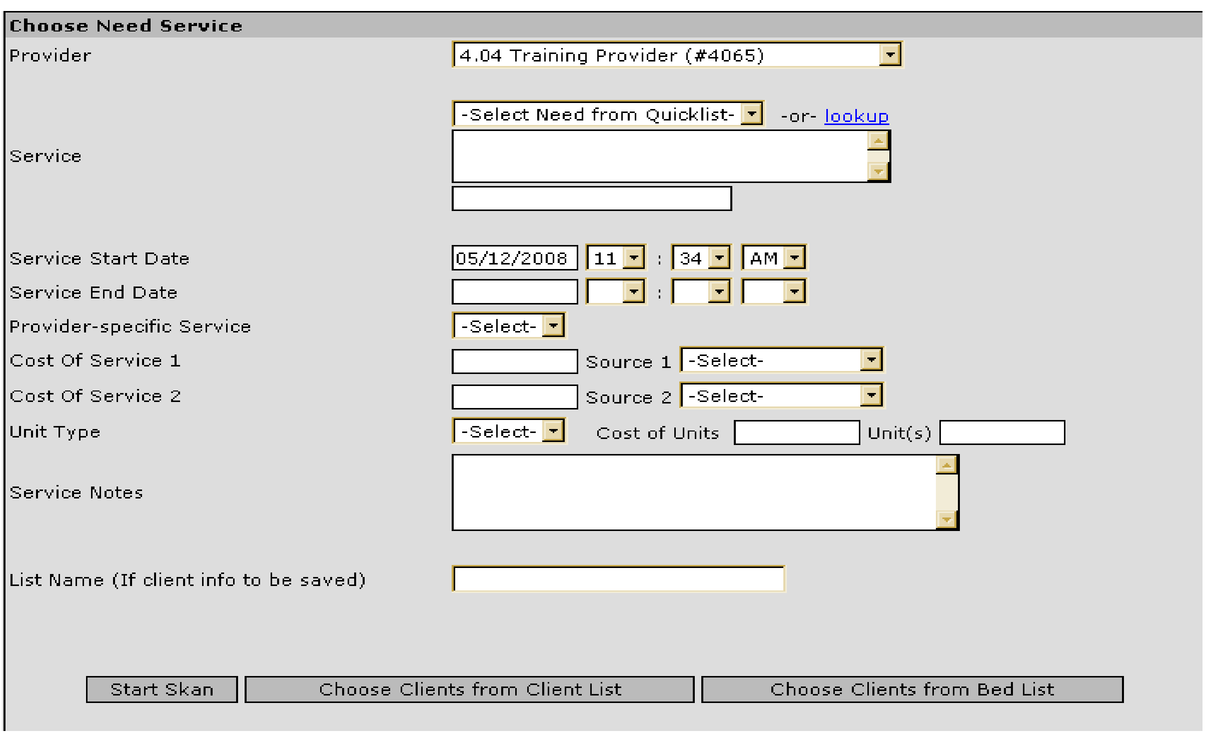


The initial SkanPoint screen is divided into three sections:

<u>First Section:</u>

Choose Need Service

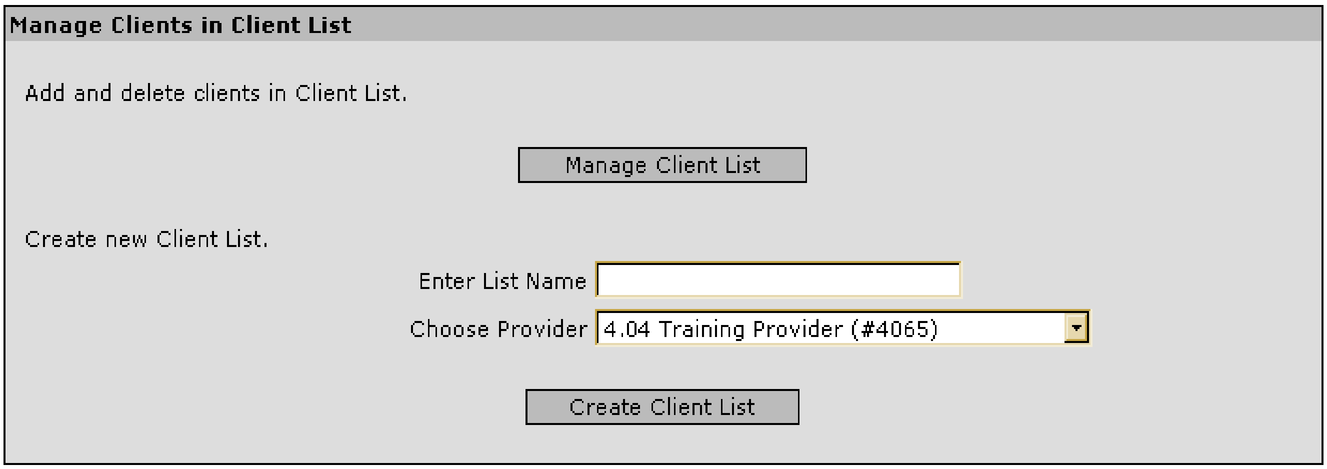
This is used to define provider, service, service start and end dates, cost and funding source and the Clients receiving the chosen service.



Second Section

Manage Clients in Client List

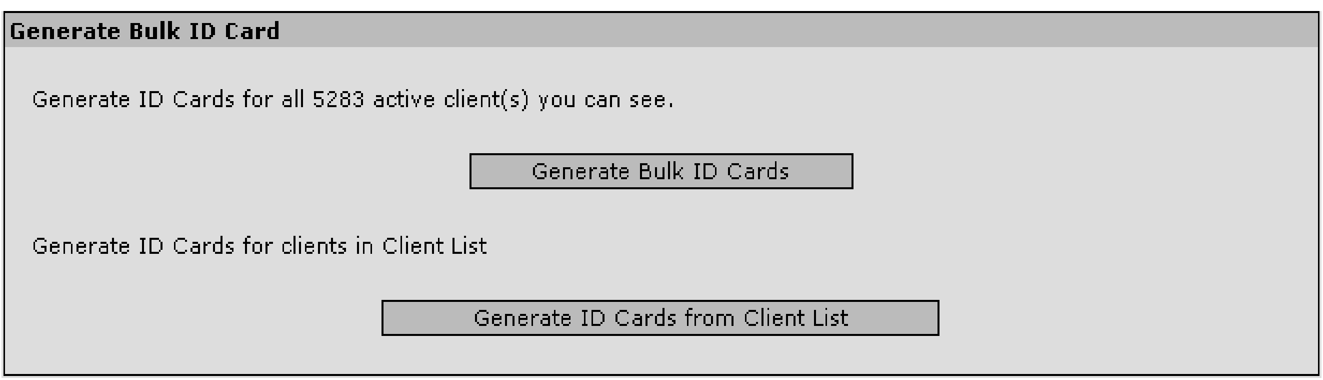
This is used to create edits, and delete Client Lists.



Third Section

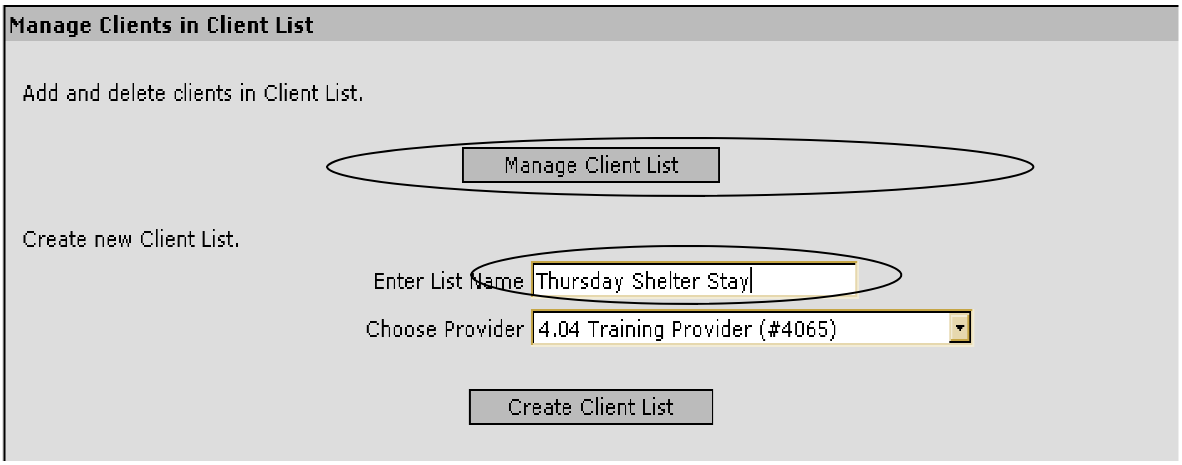
Generate Bulk ID Cards

This is used to create multiple Client ID cards at the same time.



CREATED A CLIENT LIST

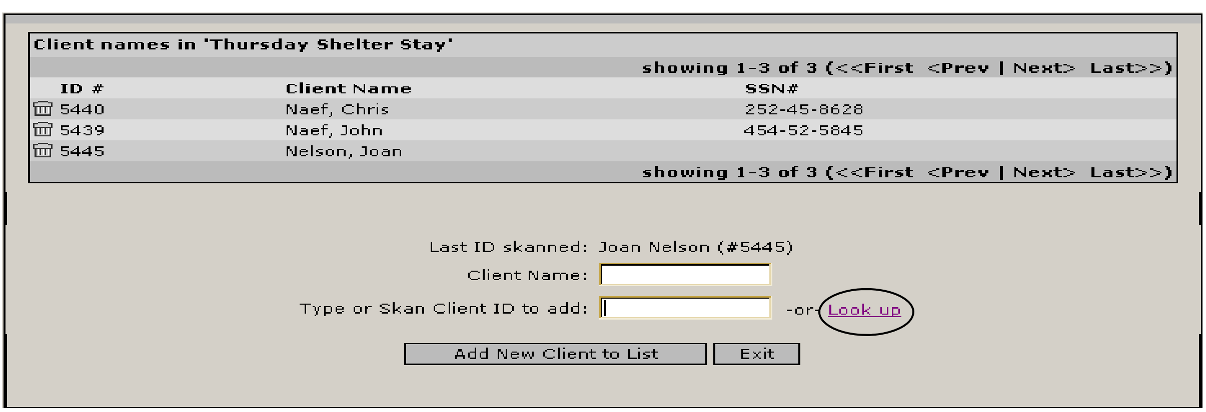
1. On the **SkanPoint** tab, scroll to the second section, “Manage Clients in Client List”.
2. In the *Enter List Name* field, create a name for your client list.



3. The Provider will default to the program that the services will be rendered.
4. Click the **Create the Client List** button.
5. If you have a client card or ID to add: Type the Client ID number or Scan the Client ID card. If you don’t have the card or the client ID use the **Lookup** link to search for the client by name.

An existing client list can be access and edited by clicking on the Managing client list button. A popup window opens to display all existing lists. Once you select a list, the popup window closes and the SkanPoint screen refreshes to display all the clients that below to the chose list.

6. Type client’s information into the fields and click on the **Look up** button.



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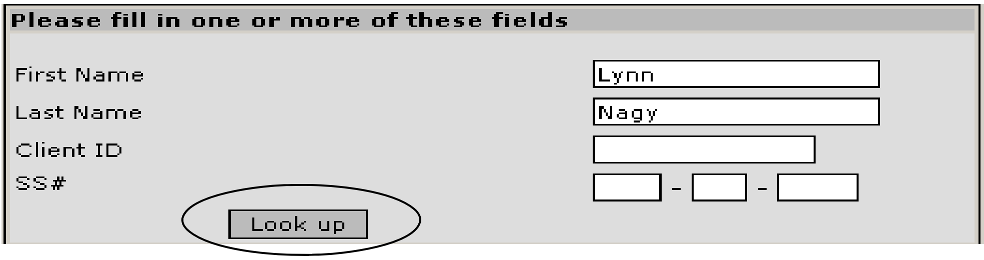

Please fill in one or more of these fields

First Name	Lynn
Last Name	Nagy
Client ID	
SS#	- -

Look up

6. Click on client's name link and the name will auto-populate to the list screen.


Matching Clients

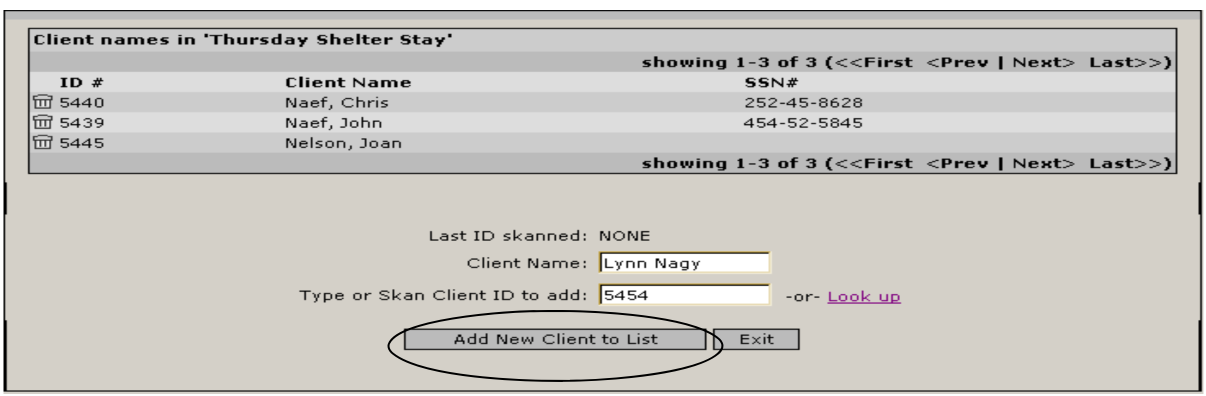
showing 1-1 of 1 (<<First <Prev | Next> Last>>)

ID #	Client Name	SSN#
5454	Nagy , Lynn	514-55-7525

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

Back

7. Click **Add New Client to List** button and the name will be added to list.


Client names in 'Thursday Shelter Stay'

showing 1-3 of 3 (<<First <Prev | Next> Last>>)

ID #	Client Name	SSN#
5440	Naef, Chris	252-45-8628
5439	Naef, John	454-52-5845
5445	Nelson, Joan	

showing 1-3 of 3 (<<First <Prev | Next> Last>>)

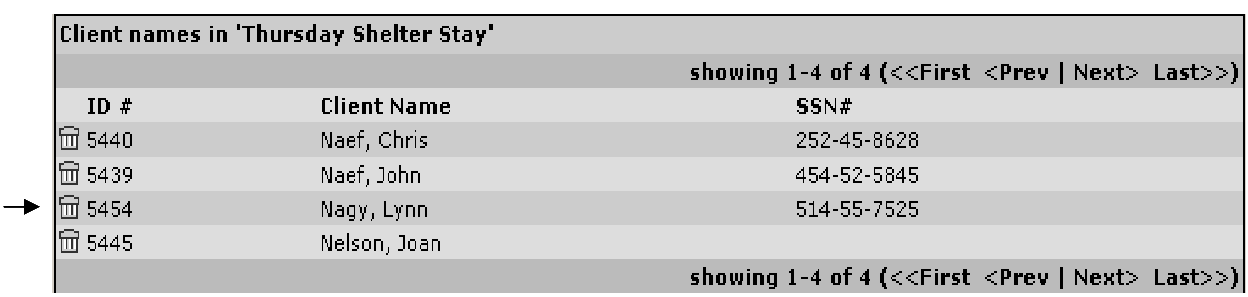
Last ID skanned: NONE

Client Name: Lynn Nagy

Type or Skan Client ID to add: 5454 -or- Look up

Add New Client to List Exit

8. The new name will be added to list alphabetically.


Client names in 'Thursday Shelter Stay'

showing 1-4 of 4 (<<First <Prev | Next> Last>>)

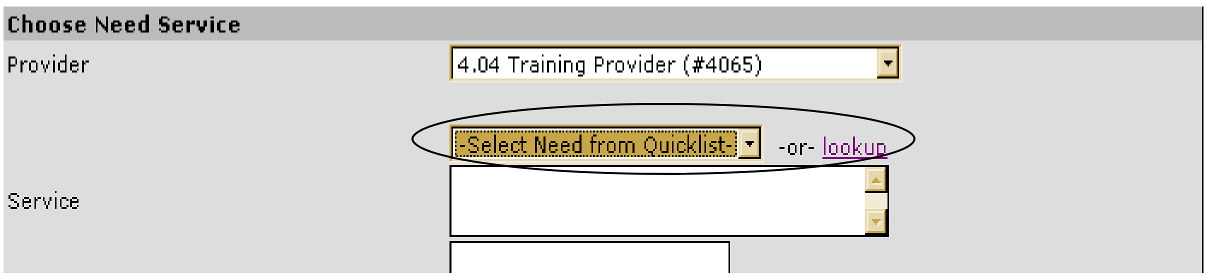
ID #	Client Name	SSN#
5440	Naef, Chris	252-45-8628
5439	Naef, John	454-52-5845
5454	Nagy, Lynn	514-55-7525
5445	Nelson, Joan	

showing 1-4 of 4 (<<First <Prev | Next> Last>>)

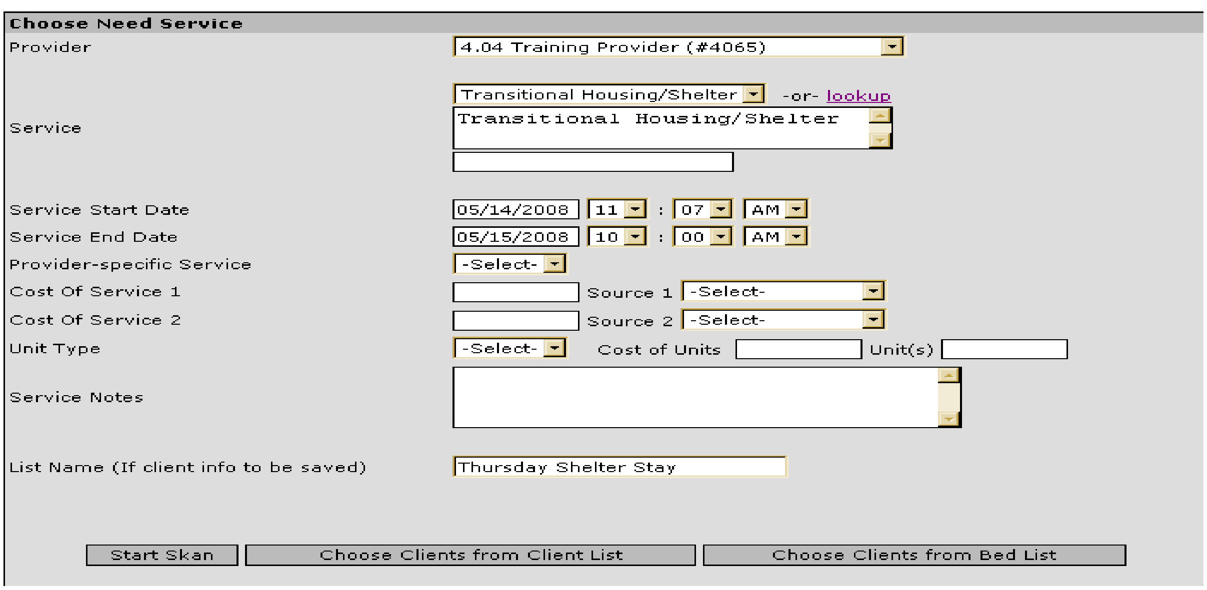
ENTERING SERVICES THROUGH SKANPOINT

In SkanPoint agencies can record the same service to multiple client records.

1. Click the **SkanPoint** tab.
2. The *Provider* will default to the program that the services will be rendered
3. Select a *Service* from the dropdown or click the look up link to select from AIRS taxonomy.

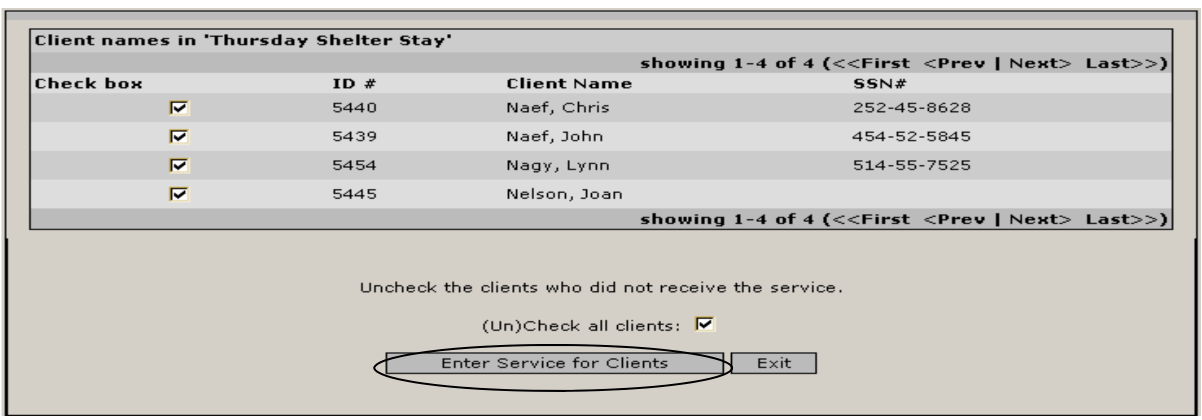


4. Enter the *service start date and time*.
5. The *Service End Date* and time is optional; enter if appropriate.
6. Select a provider specific service, if appropriate.
7. Enter the Cost of Service 1, if appropriate.
8. Select the Source 1, if appropriate.
9. If needed, you can enter the second amount of Cost of Service 2 and select the second funding source.
10. Enter *Service Notes*, if appropriate. Remember that the service notes will apply to everyone that you scan into SkanPoint under the specified service.

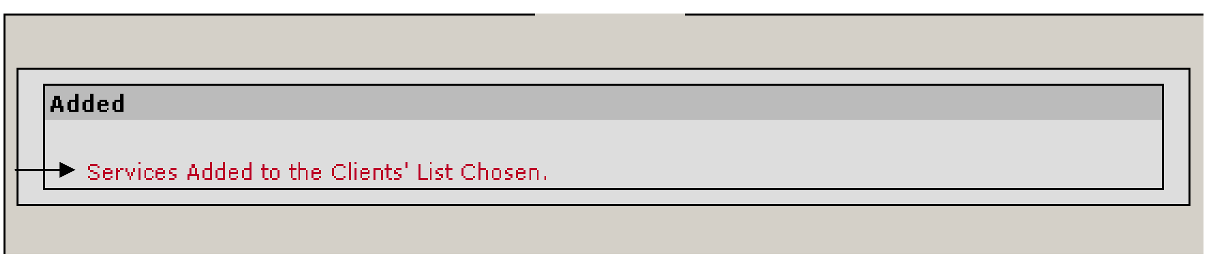


If using an existing client list:

1. Click on **Choose Client for Client List** or if you are using a Bed list **Click on Choose Clients from bed list**.
2. A list of existing client lists will display in a pop up link. Click on the link of the list you want to use.
3. A window displays clients' names. To the left there is a check box indicating the client received the service.
4. Remove the check marks for clients who are not receiving the service. Leave check boxes marked for those who did receive the service.
5. Click the **Enter Service for Clients** button



6. The window displays: *Service added for the Client list Chosen* when the service has been added.



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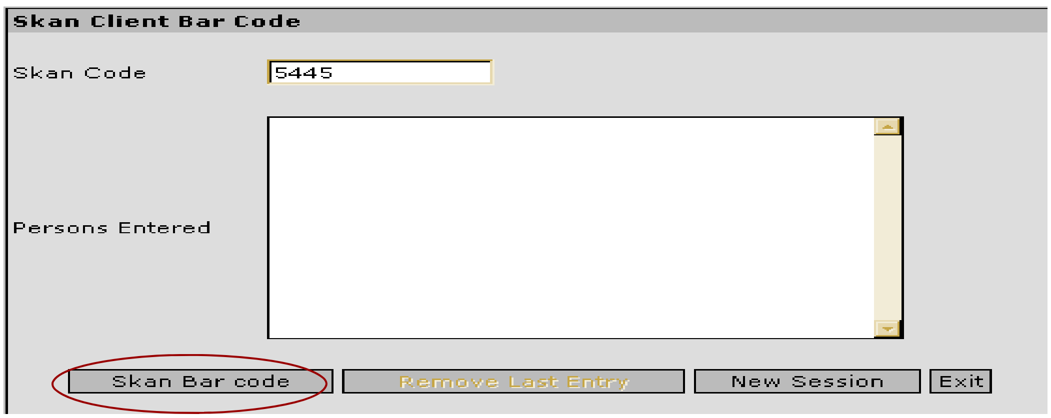
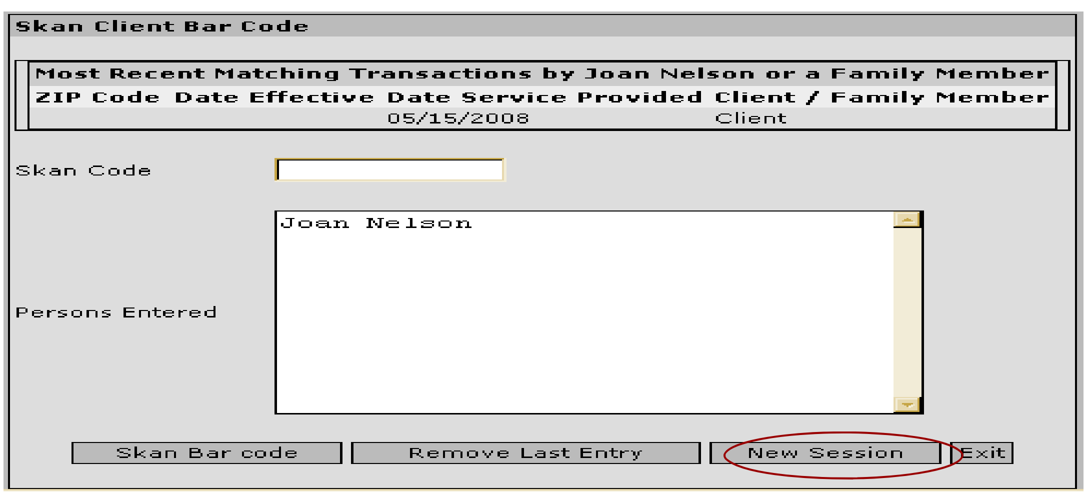
Provide services to client not in a list

1. Leave the List Name blank. Click the **Start Skan** button.
2. Scan Client ID card or type the Client ID number into the Skan Code Field and Click the **Skan Bar Code** button or press the **Enter** key. Repeat for all clients.



3.Click the **New Session** button if you wish to go back to the main SkanPoint screen. Clicking this butting will clear the service data information you originally created on the main screen.



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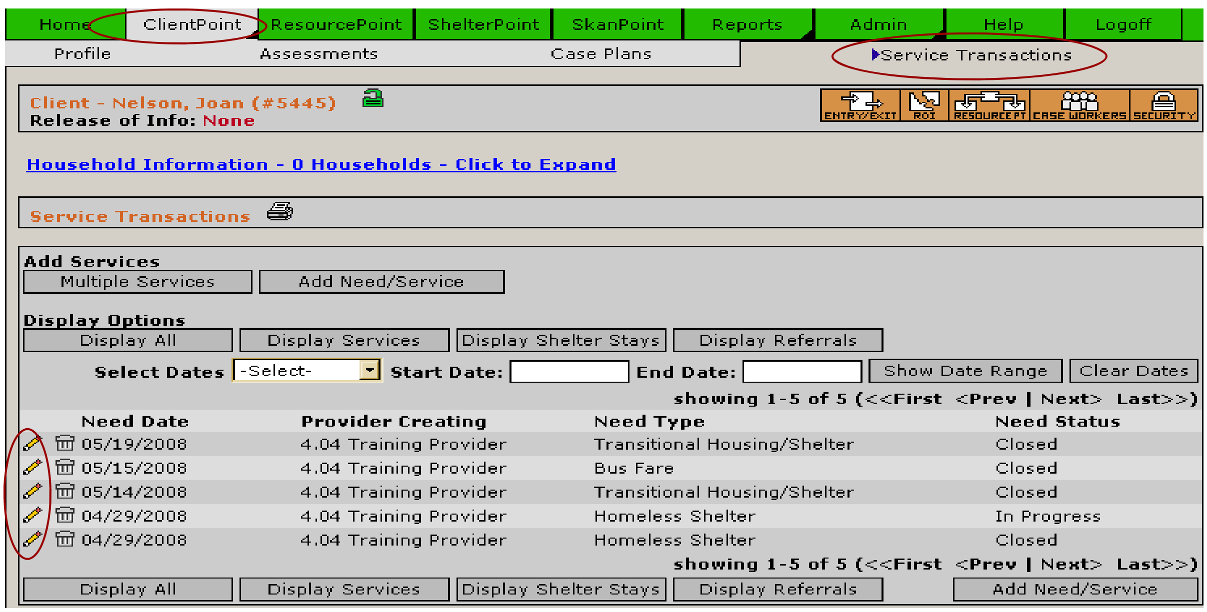
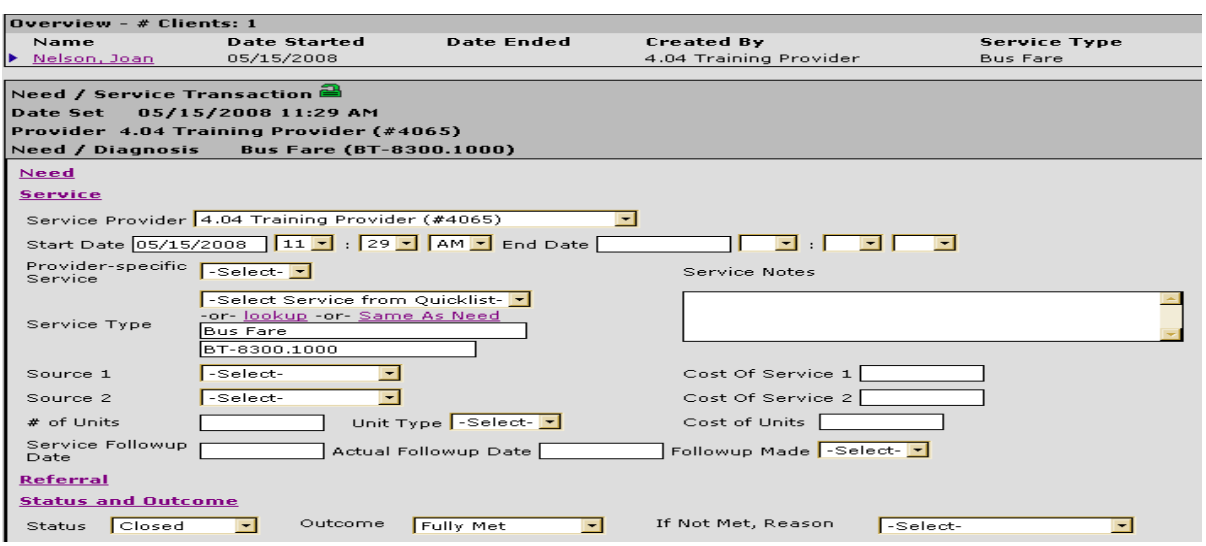
Viewing Services Entered through SkanPoint

1. Click the **ClientPoint** Tab.
2. Access the client record either by entering Name or Client ID.
3. Click the **Service Transactions** tab within ClientPoint.
4. A list of past services transaction will display including those entered through SkanPoint.
5. Click the edit icon, **the pencil** next to the need to view the details.



6. You can edit the details of the service if necessary.



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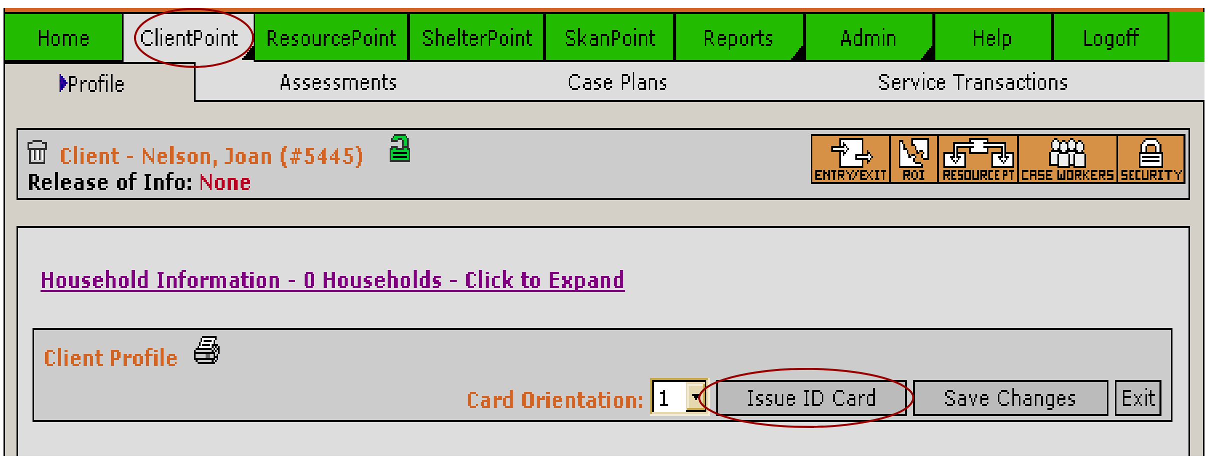
Creating Client Card

Client Card without a Photo

1. Click the **ClientPoint** tab.
2. Access the client record either searching by name or by Client ID number.
3. While on the Profile screen select the Card Orientation Drop down; if you have a page that has 10 perforated cards you can pick the spot for the card to print so you can print up to 10 different client cards using the same page. Each card prints separately.
4. Click the **Issue Card Button**.

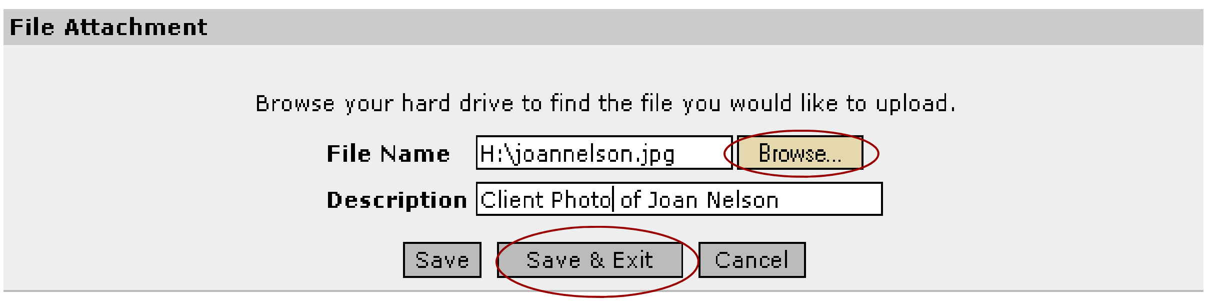


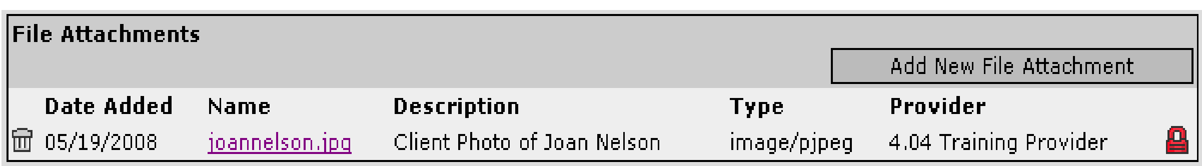
- Adobe Acrobat reader will open allowing you to preview the Client ID card in the PDF. Preview the card for accuracy.

5. To print, load labels in printer and click the **Print** icon on the toll bar. Select the correct printer and click **OK**.
6. Once you have finished printing, close the card window; this will take you back to the Client profile screen.

Client Card with a Photo

1. Click the **ClientPoint** tab.
2. Access the client record either searching by name or Client ID number.
3. The client record will open to the Profile Screen. Scroll down to the *File Attachment* section click **Add New File Attachments** button. A popup window to down load picture files will appear.
4. Click the **Browse** button in the popup window.
5. Select a file to use as the Client ID photo; must be a JPEG or in .jpg format.



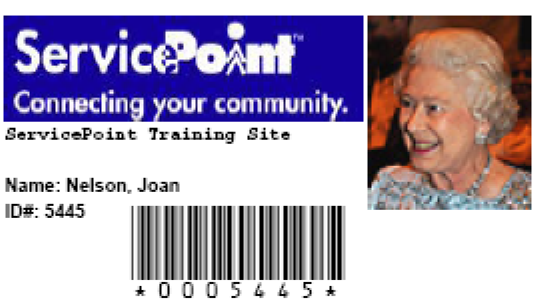


File Attachments

Add New File Attachment

Date Added	Name	Description	Type	Provider
05/19/2008	joannelson.jpg	Client Photo of Joan Nelson	image/pjpeg	4.04 Training Provider

6. Click the **Save & Exit**. The file will display in the File attachment section.
7. Scroll to the top of the Client Profile screen and select *Card Orientation*.



8. Click **Issue ID Card** button. The photo will automatically fill into the photo space.

**Follow the printing instructions on the previous example; step 5 and 6.

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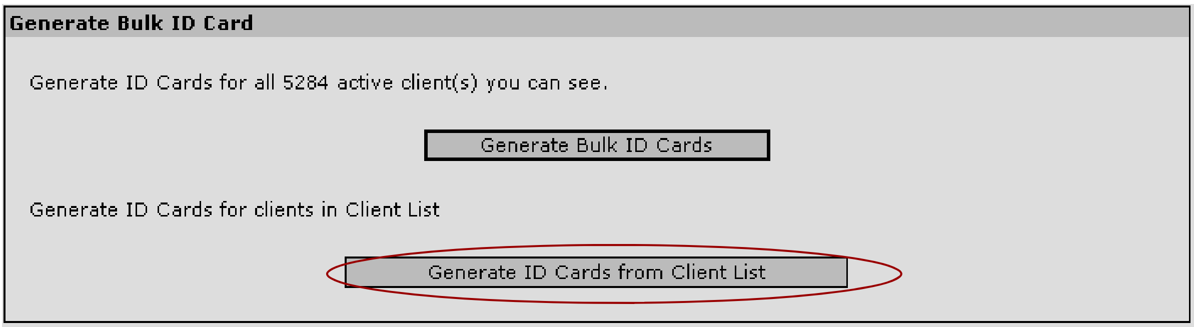
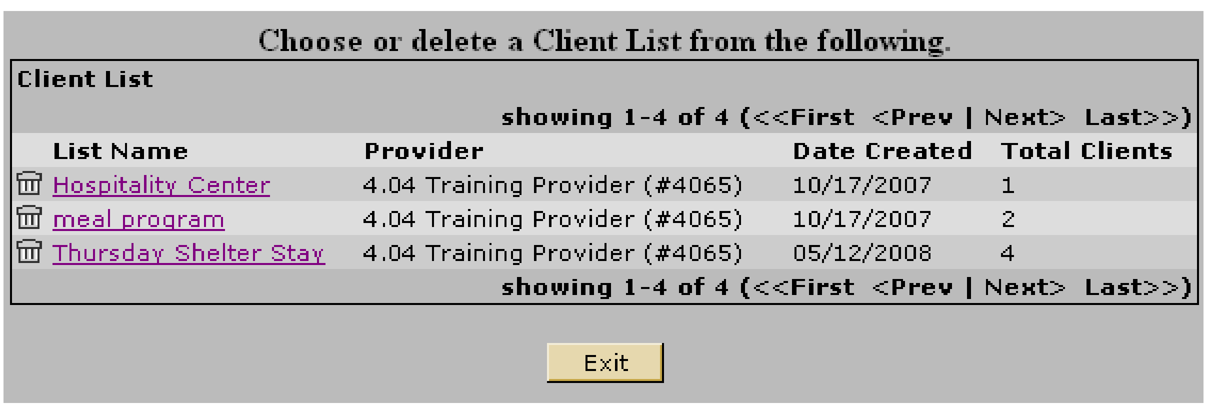
Printing ID Cards from SkanPoint



1. Click the **SkanPoint** tab.
2. Scroll to generate Bulk ID cards
3. Click **Generate ID cards from Client List**.
4. Your client lists will display. Select list you wish to use from the display.



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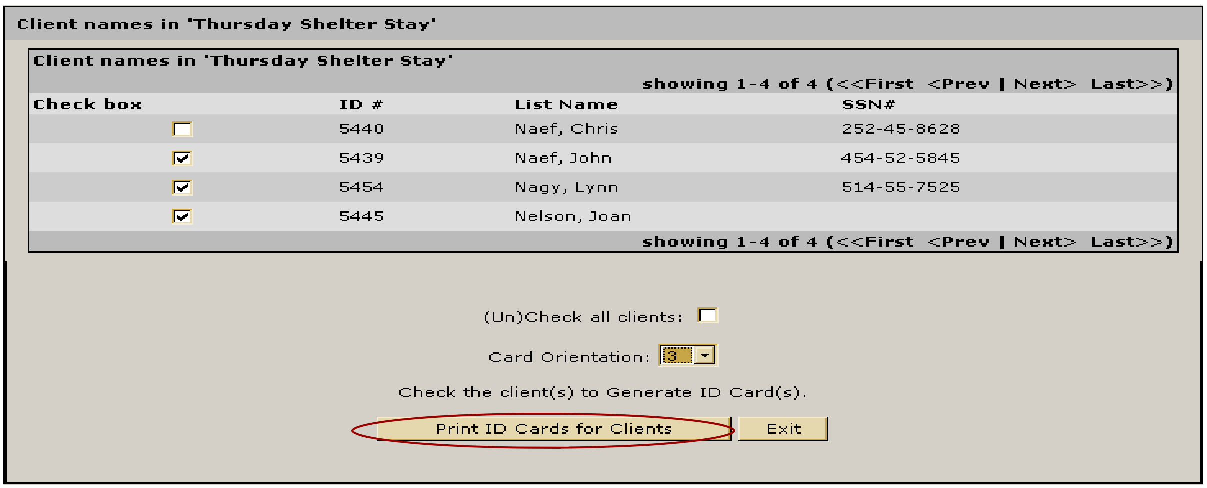
5. Check the box next to the names of the clients you wish to create a card.
6. Choose the Card Orientation. This is starting location for the print on the page; most of the time you will want 1 selected. You can print up to 10 different cards on one sheet.
7. Click **Print ID cards for Clients**.


Client names in 'Thursday Shelter Stay'

Client names in 'Thursday Shelter Stay'

showing 1-4 of 4 (<<First <Prev | Next> Last>>)

Check box	ID #	List Name	SSN#
☐	5440	Naef, Chris	252-45-8628
☑	5439	Naef, John	454-52-5845
☑	5454	Nagy, Lynn	514-55-7525
☑	5445	Nelson, Joan	

showing 1-4 of 4 (<<First <Prev | Next> Last>>)

(Un)Check all clients: ☐

Card Orientation: 3

Check the client(s) to Generate ID Card(s).

Print ID Cards for Clients | Exit

8. To print, load labels in printer and click the **Print** icon on the toll bar. Sect the correct printer and click OK.
9. Once you have finished printing, close the card window; this will take you back to the Client profile screen.