

WISCONSIN
ServicePoint

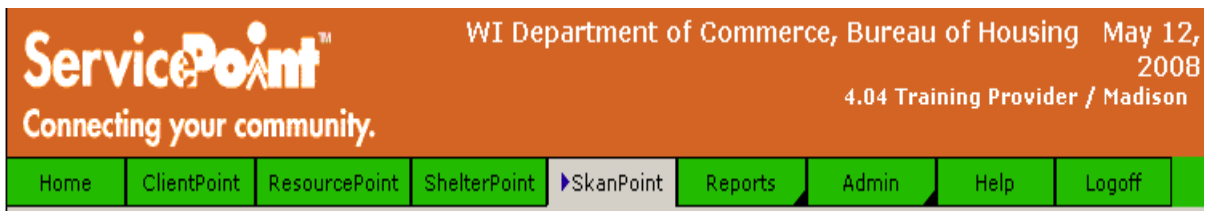
How-To Guide

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:

First Section:

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.

The screenshot shows the "Choose Need Service" form. It contains the following fields and controls:

- Provider:** A dropdown menu with "4.04 Training Provider (#4065)" selected.
- Service:** A dropdown menu with "-Select Need from Quicklist-" selected, and a link for "-or- lookup".
- Service Start Date:** A date field with "05/12/2008", a time field with "11 : 34", and an AM/PM selector with "AM" selected.
- Service End Date:** Empty date and time fields.
- Provider-specific Service:** A dropdown menu with "-Select-" selected.
- Cost Of Service 1:** An empty text field and a dropdown menu with "-Select-" selected.
- Cost Of Service 2:** An empty text field and a dropdown menu with "-Select-" selected.
- Unit Type:** A dropdown menu with "-Select-" selected, followed by "Cost of Units" and an empty text field, and "Unit(s)" and an empty text field.
- Service Notes:** A large text area with a scroll bar.
- List Name (If client info to be saved):** An empty text field.

At the bottom of the form are three buttons: "Start Skan", "Choose Clients from Client List", and "Choose Clients from Bed List".

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Second Section**Manage Clients in Client List**

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

Manage Clients in Client List
Add and delete clients in Client List.

Create new Client List.
Enter List Name
Choose Provider

Third Section**Generate Bulk ID Cards**

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

Generate Bulk ID Card
Generate ID Cards for all 5283 active client(s) you can see.

Generate ID Cards for clients in Client List

SKANPOINT

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.

Manage Clients in Client List

Add and delete clients in Client List.

Create new Client List.

Enter List Name

Choose Provider

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.

Client names in 'Thursday Shelter Stay'

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

ID #	Client Name	SSN#
<input type="checkbox"/> 5440	Naef, Chris	252-45-8628
<input type="checkbox"/> 5439	Naef, John	454-52-5845
<input type="checkbox"/> 5445	Nelson, Joan	

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

Last ID scanned: Joan Nelson (#5445)

Client Name:

Type or Skan Client ID to add: -or- [Look up](#)

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Please fill in one or more of these fields

First Name

Last Name

Client ID

SS# - -

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>>)

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 scanned: NONE

Client Name:

Type or Skan Client ID to add: -or- [Look up](#)

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>>)

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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.

Choose Need Service

Provider

-or- [lookup](#)

Service

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.

Choose Need Service

Provider

-or- [lookup](#)

Service

Service Start Date :

Service End Date :

Provider-specific Service

Cost Of Service 1 Source 1

Cost Of Service 2 Source 2

Unit Type Cost of Units Unit(s)

Service Notes

List Name (If client info to be saved)

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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

Client names in 'Thursday Shelter Stay'			
showing 1-4 of 4 (<<First <Prev Next> Last>>)			
Check box	ID #	Client Name	SSN#
<input checked="" type="checkbox"/>	5440	Naef, Chris	252-45-8628
<input checked="" type="checkbox"/>	5439	Naef, John	454-52-5845
<input checked="" type="checkbox"/>	5454	Nagy, Lynn	514-55-7525
<input checked="" type="checkbox"/>	5445	Nelson, Joan	

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

Uncheck the clients who did not receive the service.

(Un)Check all clients:

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

Added

Services Added to the Clients' List Chosen.

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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.

Skan Client Bar Code

Skan Code

Persons Entered

--

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

Skan Client Bar Code

Most Recent Matching Transactions by Joan Nelson or a Family Member
ZIP Code Date Effective Date Service Provided Client / Family Member
05/15/2008 Client

Skan Code

Persons Entered

Joan Nelson

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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.

Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Admin Help Logoff

Profile Assessments Case Plans Service Transactions

Client - Nelson, Joan (#5445)
Release of Info: None

Household Information - 0 Households - Click to Expand

Service Transactions

Add Services
Multiple Services Add Need/Service

Display Options
Display All Display Services Display Shelter Stays Display Referrals

Select Dates -Select- Start Date: End Date: Show Date Range Clear Dates

showing 1-5 of 5 (<<First <Prev | Next> Last>>)

Need Date	Provider Creating	Need Type	Need Status
05/19/2008	4.04 Training Provider	Transitional Housing/Shelter	Closed
05/15/2008	4.04 Training Provider	Bus Fare	Closed
05/14/2008	4.04 Training Provider	Transitional Housing/Shelter	Closed
04/29/2008	4.04 Training Provider	Homeless Shelter	In Progress
04/29/2008	4.04 Training Provider	Homeless Shelter	Closed

showing 1-5 of 5 (<<First <Prev | Next> Last>>)

Display All Display Services Display Shelter Stays Display Referrals Add Need/Service

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

Overview - # Clients: 1

Name	Date Started	Date Ended	Created By	Service Type
Nelson, Joan	05/15/2008		4.04 Training Provider	Bus Fare

Need / Service Transaction

Date Set 05/15/2008 11:29 AM
Provider 4.04 Training Provider (#4065)
Need / Diagnosis Bus Fare (BT-8300.1000)

Need

Service

Service Provider 4.04 Training Provider (#4065)

Start Date 05/15/2008 11 : 29 AM End Date

Provider-specific Service -Select- Service Notes

Service Type -Select Service from Quicklist-
-or- lookup -or- Same As Need
Bus Fare

Source 1 -Select- Cost Of Service 1

Source 2 -Select- Cost Of Service 2

of Units Unit Type -Select- Cost of Units

Service Followup Date Actual Followup Date Followup Made -Select-

Referral

Status and Outcome

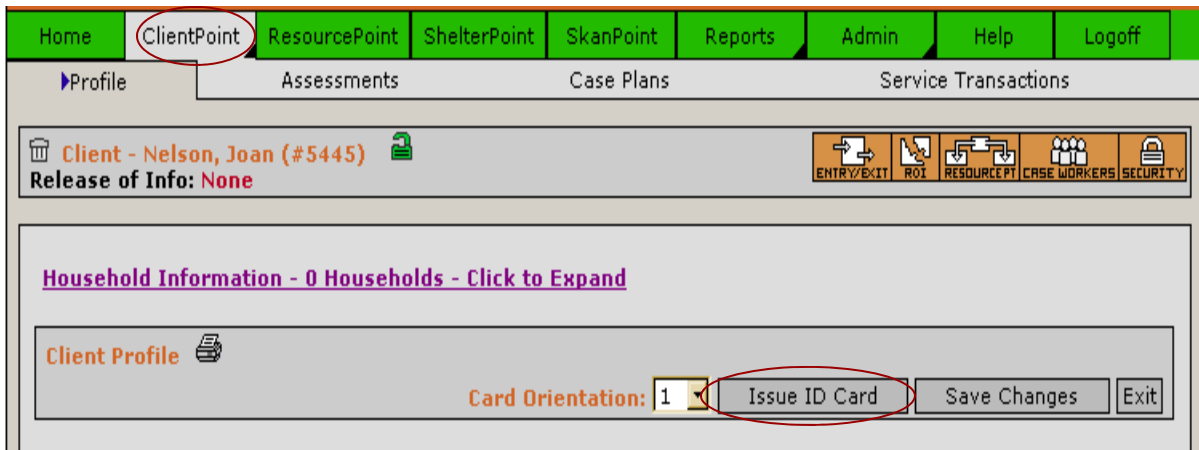
Status Closed Outcome Fully Met If Not Met, Reason -Select-

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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.

DOCUMENT TITLE

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 download 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 Attachment

Browse your hard drive to find the file you would like to upload.

File Name

Description

File Attachments

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




Generate Bulk ID Card

Generate ID Cards for all 5284 active client(s) you can see.

Generate ID Cards for clients in Client List

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.

Choose or delete a Client List from the following.

Client List			
showing 1-4 of 4 (<<First <Prev Next> Last>>)			
List Name	Provider	Date Created	Total Clients
 Hospitality Center	4.04 Training Provider (#4065)	10/17/2007	1
 meal program	4.04 Training Provider (#4065)	10/17/2007	2
 Thursday Shelter Stay	4.04 Training Provider (#4065)	05/12/2008	4
showing 1-4 of 4 (<<First <Prev Next> Last>>)			

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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'

Check box	ID #	List Name	SSN#
<input type="checkbox"/>	5440	Naef, Chris	252-45-8628
<input checked="" type="checkbox"/>	5439	Naef, John	454-52-5845
<input checked="" type="checkbox"/>	5454	Nagy, Lynn	514-55-7525
<input checked="" type="checkbox"/>	5445	Nelson, Joan	

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

(Un)Check all clients:

Card Orientation:

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

Print ID Cards for Clients

8. To print, load labels in printer and click the **Print** icon on the toll bar. Select 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.

