AN INTRODUCTION TO SERVICEPOINT AND THE CLIErrNTPOINT MODULE

Institute for Community Alliances

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Contents

INTENT

This document serves as an introduction to ServicePoint and functions within ServicePoint's ClientPoint Module. This is not a comprehensive guide; the guide focuses on ServicePoint features that are utilized frequently and that will ultimately make you a stronger ServicePoint user.

COMMON TERMS

The following section describes common terminology you may see within ServicePoint and throughout this introduction to ServicePoint.

HOME PAGE TERMS

System News – A "bulletin board" used by ICA to notify end-users of essential information.

Agency News – Located on the Home Page, agencies can post news or alerts on the "bulletin board" so that it is shared internally with end-users at that agency.

SERVICEPOINT MODULES

ClientPoint – This module can be described as a "filing cabinet" that stores client records. ClientPoint houses Client Records and Service Transactions, it is used for:

- All data-entry related to creating and maintaining client records
- Managing project enrollments
- Recording client Needs, Services, and Referrals

ShelterPoint - This module allows emergency shelters to track bed availability at any given time; however, data entry must always be current.

SkanPoint - Allows you to generate Client ID cards, create a list of clients by scanning ID cards, and add single or multiple services to all clients on a list. SkanPoint provides an efficient way to document a service provided to several clients at the same time.

REPORTING TERMS

Advanced Reporting Tool (ART) – ART is a comprehensive reporting tool that contains a multitude of report options from data quality reports to MHDC billing/audit reports. An end-user must have an ART License to access these reports. ART is housed on a separate server and is refreshed twice a day. Data entries and corrections made to client records will not be captured in ART reports until after the database is refreshed. While the refresh does not always occur at the exact same time every day, it's usually *before* 5:00am and again *before* 1:00pm.

Reports Module – Located in the Navigation Menu, docked on the left side of the ServicePoint window, is the Reports Module. The Reports Module dashboard contains several pre-formatted, "canned" reports, as well as, the ReportWriter tool.

Canned reports pull data from the ServicePoint database; therefore, they update instantly following entries or corrections made to client records. Examples of canned reports include:

- **CoC-APR -** CoC funded projects
- **ESG CAPER -** ESG funded projects
- **SSVF Export -** Export/Quality Report

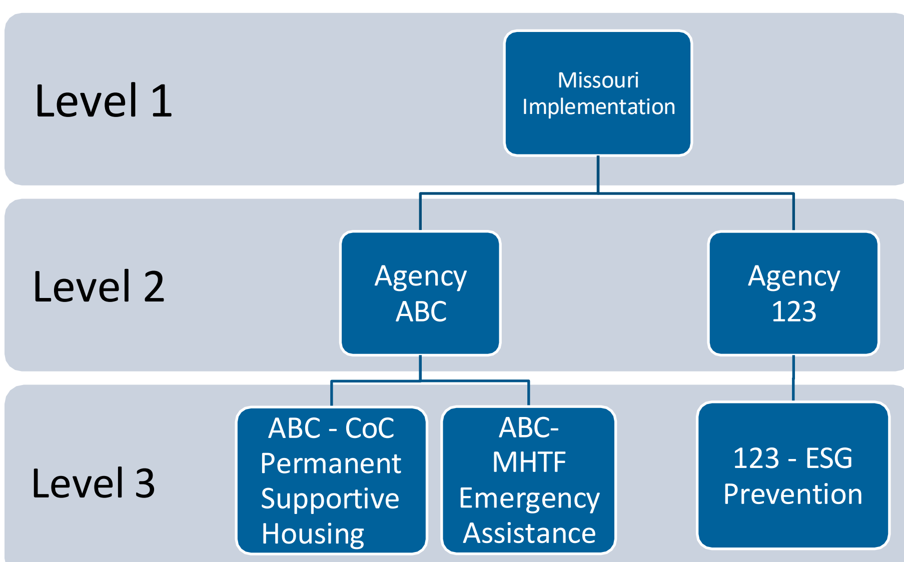
If there isn't a canned report that meets your reporting needs, you can use the ReportWriter tool to create simple, custom reports using tables, fields and filters.

CLIENTPOINT TERMS

Provider - ServicePoint uses a tier, or tree structure, to organize providers in a way that identifies their purpose or role in the system. This tree structure is similar to an organizational chart.

- **Level 1 Provider** – The Missouri Implementation, which is made up of 5 CoCs (Balance of State, Joplin, Springfield, St. Louis City and St. Louis County), is at the top of the tier.
- **Level 2 Providers** – Below the Missouri Implementation, Level 2 of the tier, are all the housing agencies in the CoCs named above. Data is never entered as a Level 2 Provider, also known as, the agency/organization where you work.
- **Level 3 Providers** – Beneath each Agency are the programs that provide services to clients. A client may receive Permanent Supportive Housing services which is funded by HUD-CoC. Or, a client may receive emergency assistance from your agency's Emergency Assistance program, funded by MHDC-MHTF Emergency Assistance, etc.

  You will ALWAYS **Enter Data As** one of your agency's Level 3 programs, or Level 4 program, if applicable.



Enter Data As (EDA) - A feature that allows end-users to select the project (Level 3 or Level 4) that served the client for which data is being entered. The selected EDA provider will determine the assigned assessments/sub-assessments that will display in the client record and/or service transaction record.

An EDA Provider must be set *before* entering or editing any client data.

Back Date Mode – The Back Date feature allows you to enter client information for a date prior to the current date and time. This is useful for end-users that are unable to enter data into ServicePoint on the same day it was collected from the client.

Back Date Mode:

- Time stamps the Date Effective for reporting the data as of the Back Date selected
- Is used for editing information that was relevant in the past
- Allows for a historic build-up of information, so that changes in client information, over time, can be seen

Client ID – A unique number generated by ServicePoint and assigned to each client entered in the system. This number should be written down in the client's hard copy file and should be used when communicating with our Helpdesk.

Emailing protected personal information (PPI) (i.e. name, DOB, Social Security number, address, etc.) **is prohibited**. The Client ID can be used when you need help with a specific client record.

Household ID - A unique number generated by ServicePoint and assigned to each household composite created under the Household's tab in the client record. A client can be in multiple households; you must ensure the correct Household ID is selected when adding an ROI, enrolling the client in a project, or recording services.

Assessment(s) – Assessments are electronic forms where required data elements, collected from clients, are recorded in ServicePoint. The data elements required for an assessment will be dependent on the funder/project type. Assessments are named in a manner that allows end-users to identify which funder/project type requires the data and at what point the data was collected.

- **HUD – CoC/ESG/HOPWA** (Entry, Update/Interim, and Exit)
- **MHDC – MHTF/MoHIP** (Entry, Update/Interim, and Exit)
- **VA – SSVF** (HP Entry, RRH Entry, Update/Interim and Exit)
- **Special Needs** – HUD-CoC/ESG, and VA-HCHV/GPD

Sub-Assessment(s) – A sub-assessment is a form within an assessment where particular data elements are recorded. Examples of sub-assessment forms include:

- **Health Insurance Information** (Entry, Update/Interim and Exit assessments)
- **Income and Sources** (Entry, Update/Interim and Exit assessments)
- **Non-Cash Benefits** (Entry, Update/Interim and Exit assessments)
- **Disabilities** (Special Needs assessment)

Entry/Exit Type – As noted in the Assessments section on the previous page, the data elements required for an assessment are dependent on the funder/project type. ServicePoint will prompt you to select an **Entry/Exit Type** when enrolling a client/household into a project under the Entry/Exit tab. The Entry/Exit Type determines which assessments will display; the correct Type must be selected, otherwise, the correct assessments will not populate.

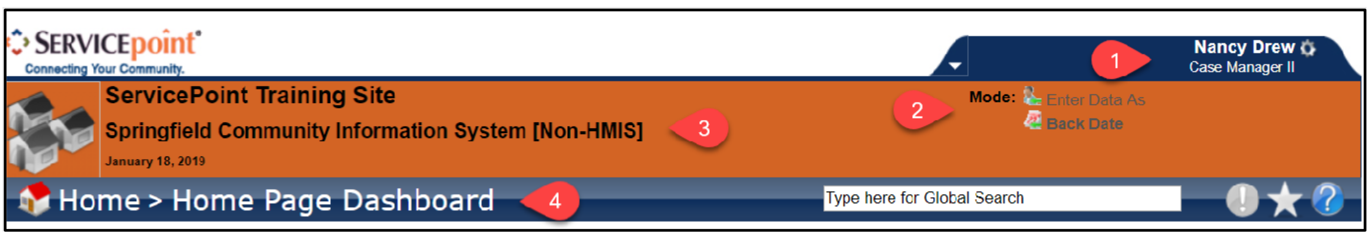
If you receive a ServicePoint pop-up notifying you that no assessment has been specified for this provider, double-check the EDA Provider and/or Entry/Exit Type selected.

Examples of Entry/Exit Types include:

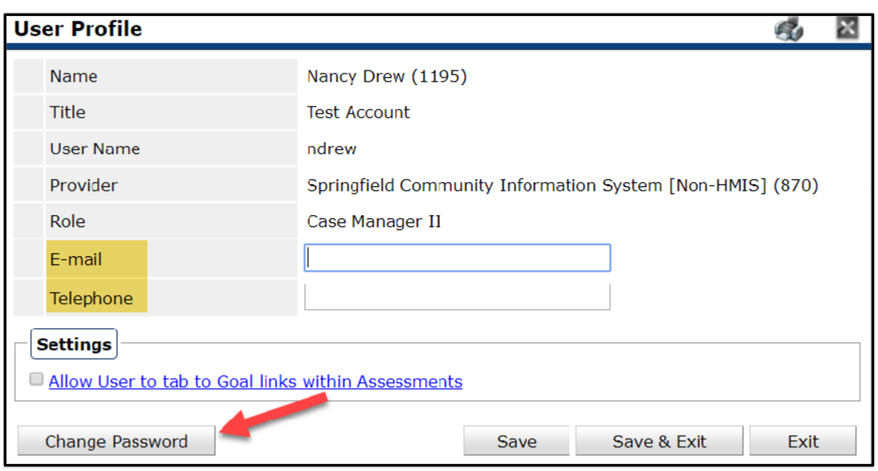
- **HUD** – CoC/ESG/HOPWA and CE projects
- **PATH** – PATH projects
- **RHY** – RHY projects
- **Standard** – MHTF/MoHIP
- **VA** – SSVF and HCHV/GPD projects

SERVICEPOINT BANNER

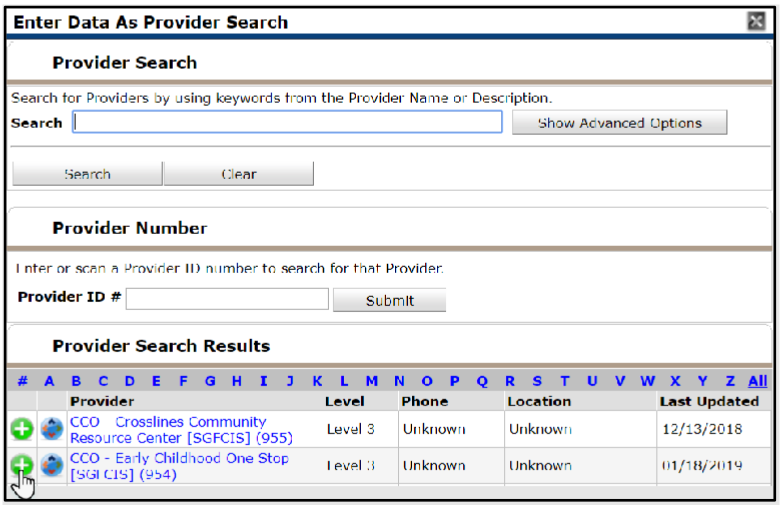
Whether you are on the Home Page Dashboard or working in the ClientPoint Module, the ServicePoint Banner will always display the following:



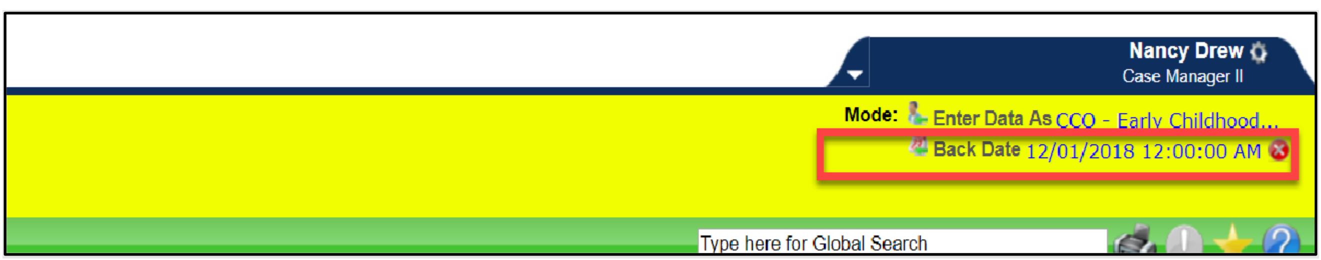
1. **Username and Role:** In the upper-right corner of ServicePoint is the name of the user logged in and their role. All ServicePoint users are set to Case Manager II which provides the necessary permissions for end-users to complete client data entry.
    a. By **clicking the gear icon** to the right of the Username, the user can add their email address, telephone phone number, and change their password.



2. **EDA and Back Date Mode:** In the upper-right corner, below the end-user role, is where the end-user changes their **Enter Data As (EDA) Provider** and **Back Date**. Failing to set either one of these functions prior to entering client data will cause errors in the client record and reports, these errors may impact other agencies in the implementation. Any data entered with an incorrect EDA or Back Date must be deleted and re-entered. If data has been entered with an incorrect EDA or Back Date, please contact our helpdesk by emailing mohmis@icalliances.org. Remember, only email the Client ID.
   a. **Enter Data As:** To change your EDA provider, click the **Enter Data As** link> click the **green plus sign** next to the appropriate provider name.



   b. **Back Date:** Click the **Back Date** link to record data collected on a date other than the current date.
      i. The ServicePoint Banner will turn yellow when you enter a **Back Date** to work in **Back Date Mode.**
      ii. To exit Back Date mode, click the red circle with an X to the right of the date (pictured below).



3. **Site Name, Agency Name, and Current Date**
   a. **ServicePoint Site Name:** (i.e. Training Site or Missouri Homeless Management Information System)
   b. **Agency Name:** The name of your agency (Level 2 provider) will appear below the Site Name
   c. **Current Date:** The current date displays below your agency's name
4. **Location Banner:** The Banner also displays your location in ServicePoint, and the bar will change colors according to which module you are working in. For example, the Home Page location bar is blue.

BANNER ICONS

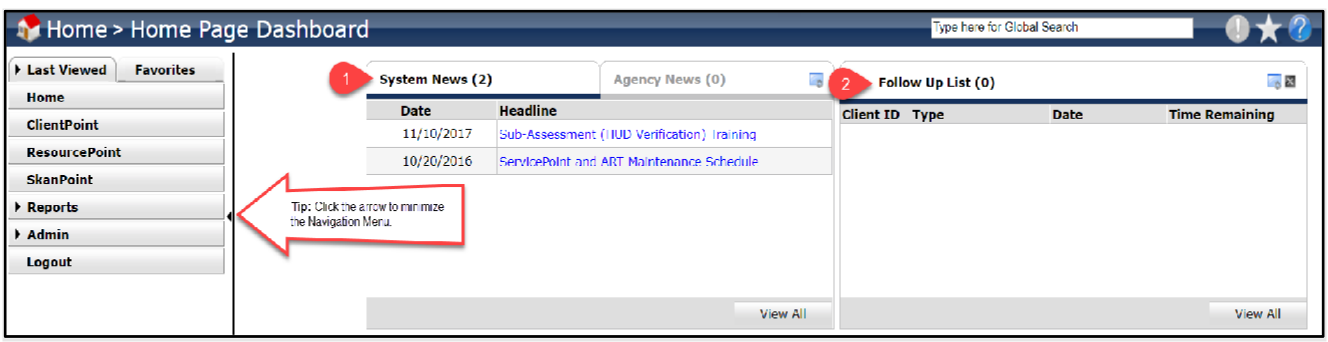
- **Printer -** Allows you to print the tab, or current screen, in the client record
- **Exclamation Point -** Will turn orange when you have unread alerts on the Home Dashboard and it will display the number of unread alerts, as well
- **Star -** Allows you to save the client record as a "Favorite"

HOME PAGE DASHBOARD

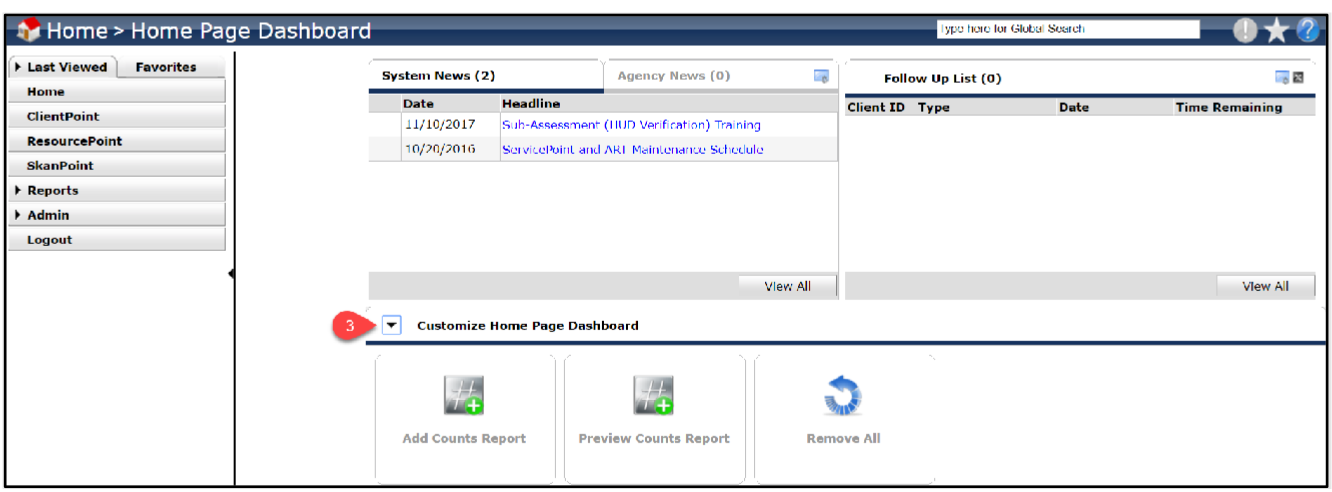
The **Home Page** is the first screen you will encounter upon logging into ServicePoint and it displays the following for all users:

1. **System News/Agency News**
2. **Follow Up List:** ServicePoint allows you to enter a **Follow Up Date** in various locations in a client record. When you input a follow-up date, ServicePoint will populate the client's ID on the **Follow Up List** as a reminder.

If you do not utilize the Follow Up List dashlet you can remove it from your Home Page by clicking on the X (close) icon in the upper right-hand corner of the dashlet.



3. Finally, each end-user has the ability to customize their Home Page by adding **Counts Reports**.



A few examples of **Counts Reports** available to display on your **Home Page** include:

- **Clients with an Entry but No Exit:** Counts clients with an entry for the specified provider within the selected date range that do not have an exit.
- **Clients with Expiring ROIs:** Counts clients for the specified provider who have an ROI End Date that falls within the selected date range.
- The "My Clients…" reports will only pull clients with a designated case manager.
  - **My Clients:** Counts the number of clients you are assigned to as Case Manager
  - **My Clients with Expiring ROIs:** Counts your clients that have expiring ROIs
  - **My Clients with Outstanding Referrals:** Counts your clients with outstanding referrals
  - **My Clients with Unserved Needs:** Counts your clients with unmet needs

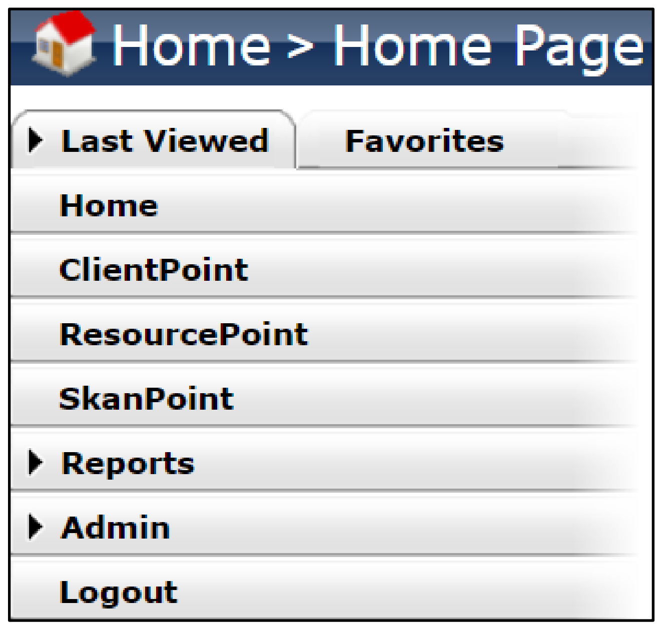
Please contact the ICA Help Desk if you would like assistance customizing your Home Page.

NAVIGATION MENU

The **Navigation Menu** is docked on the left side of the page. It's used to navigate to the different modules in ServicePoint.

The **Navigation Menu** also contains:

- A tab for users to access client records they **Last Viewed** since their most recent login
- Client records that have been marked as a favorite can be viewed under the **Favorites** tab.



CLIENTPOINT MODULE

Client case management is completed in the **ClientPoint Module**. It is essentially the "drawer" in the filing cabinet that contains your client records.

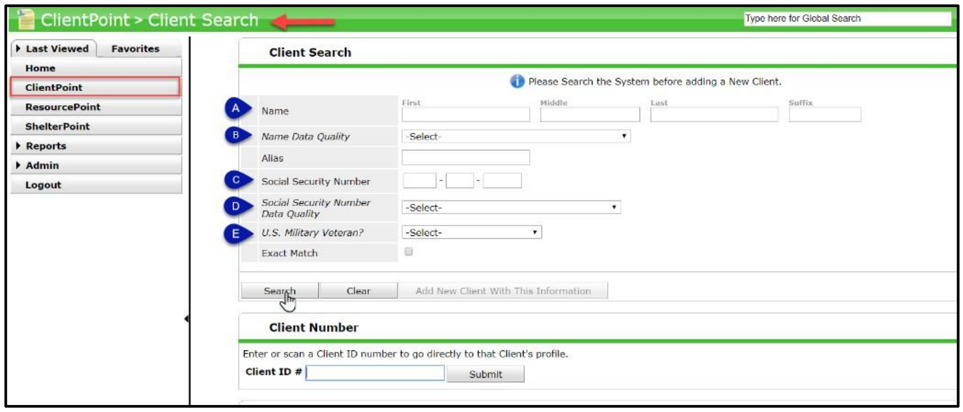
CLIENT SEARCH

When you click **ClientPoint** in the Navigation Menu, you will be directed to the **Client Search** page.

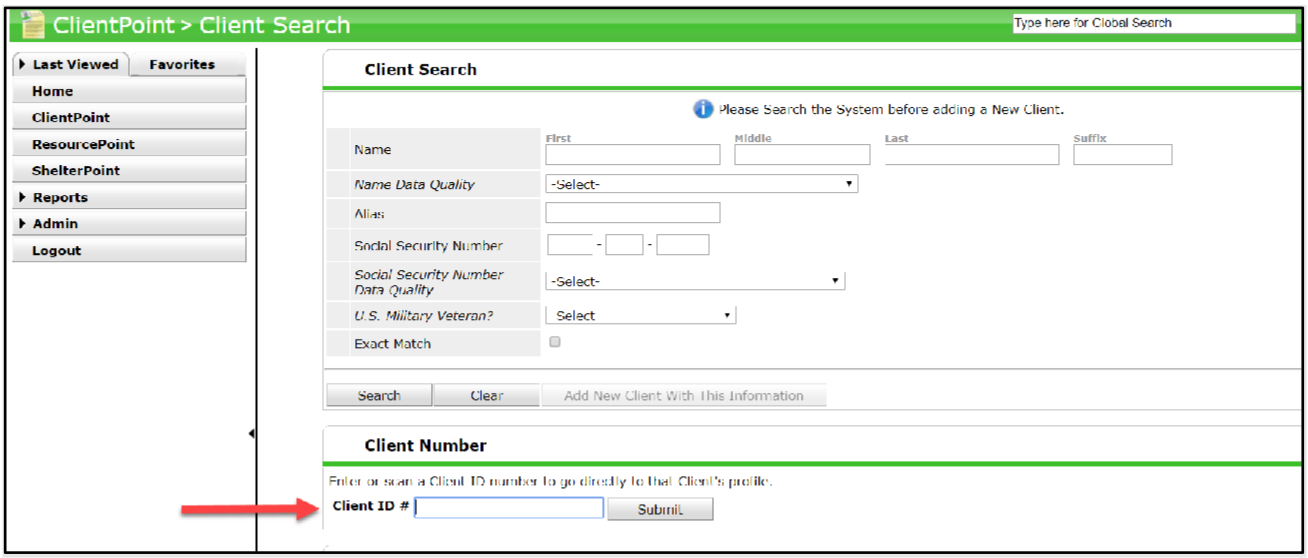
To search for a client record, begin by entering your client's personal identifying information (PII). You may complete a combination of the data fields below, or all of them.

A. Name
B. Name Data Quality
C. Social Security Number
D. SSN Data Quality
E. U.S. Military Veteran?

Click **Search**.



Or, if you know the Client ID, you can also search by **Client ID #**.



CLIENTPOINT ICONS

The following section describes common icons used throughout the ClientPoint Module and referred to in the sections that follow.

DATE FIELD ICONS

- **Calendar -** Allows you to navigate through the calendar by months or years to select a specific date
- **Blue Counterclockwise Arrow** - Allows you to clear the date in the date field
- **Calendar with Green Checkmark -** Will populate the current date, or the Back Date you have selected, in the date field

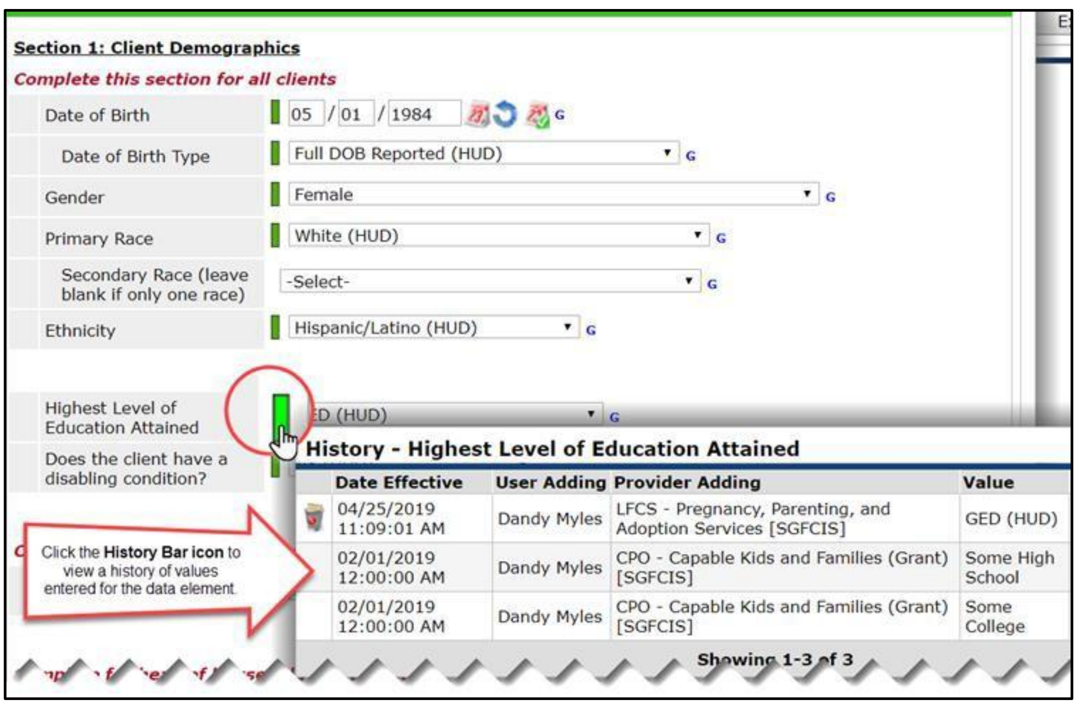
ICONS USED FOR EDITING

- **Edit -** The Edit icon is represented by a yellow pencil and enables you to edit data previously entered (i.e. ROI, Entry, Exit, Needs, Services, Referrals, etc.)
- **Delete -** Represented by an image of a trash can, the Delete icon allows you to delete whatever information is found next to it (i.e. data element, sub-assessment, assessment, project enrollment, service record, etc.)

Deleting information can impact data quality, reports, and other projects that have served the client. Always contact the ICA helpdesk before deleting any information in ClientPoint.

- **History Bar** - The History Bar icon, found on the left side of most data elements, allows you to view the history of values previously entered for that data element. It also includes the User and Provider that added the value.

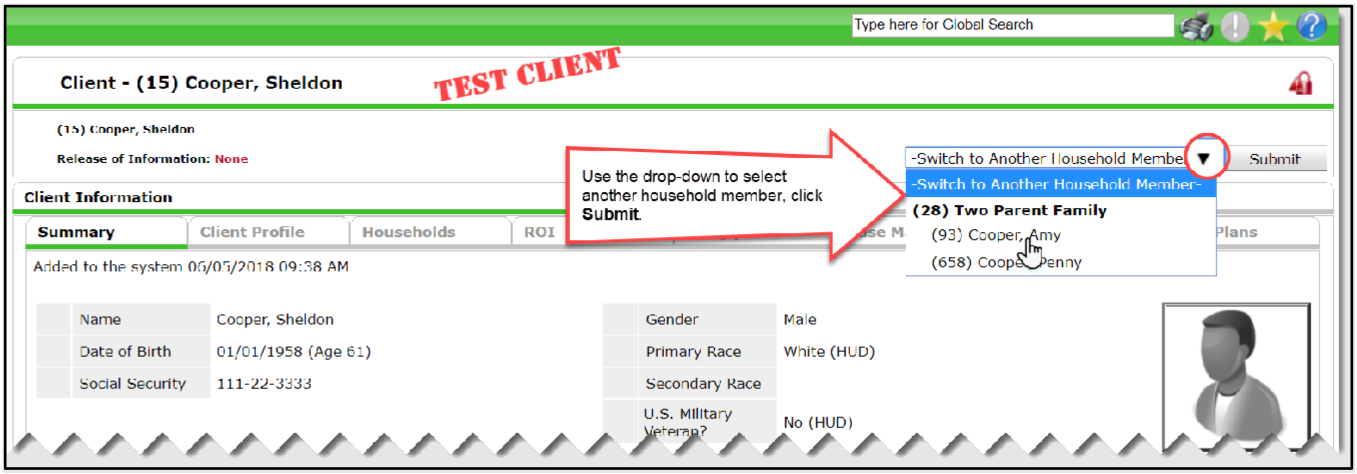
The color of a History Bar will not always appear green in color, like those pictured in this section. The History Bar changes color based on the age of the data. A green history bar indicates that the data was entered recently.



If the historical information is “hidden” or “restricted”, then a *protected* Provider has entered the data.

Switch to Another Household Member - The drop-down menu, located on the right side of the screen, in the Client Banner (directly *below* the Location Banner) allows you to **Switch to Another Household Member** from any tab in the client’s record.

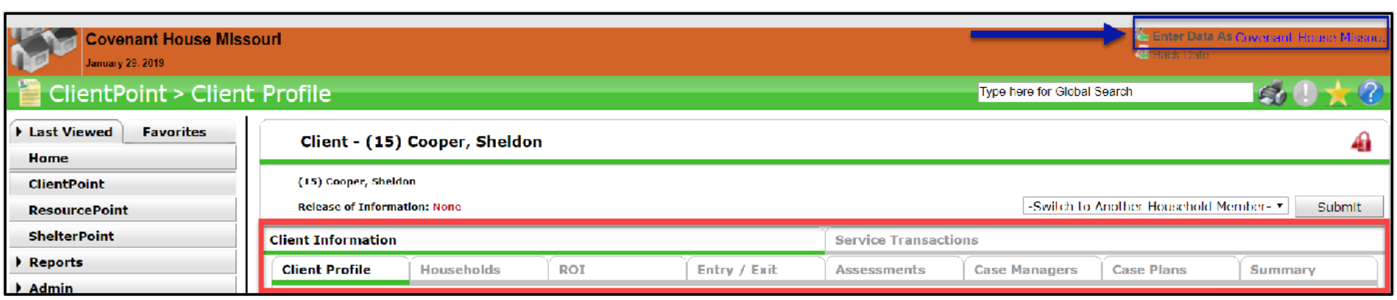
This menu is especially useful if you need to edit every record in a household. For example, clients in a household have been entered in the same project multiple times on the same day and the erroneous entries must be corrected for all household members.



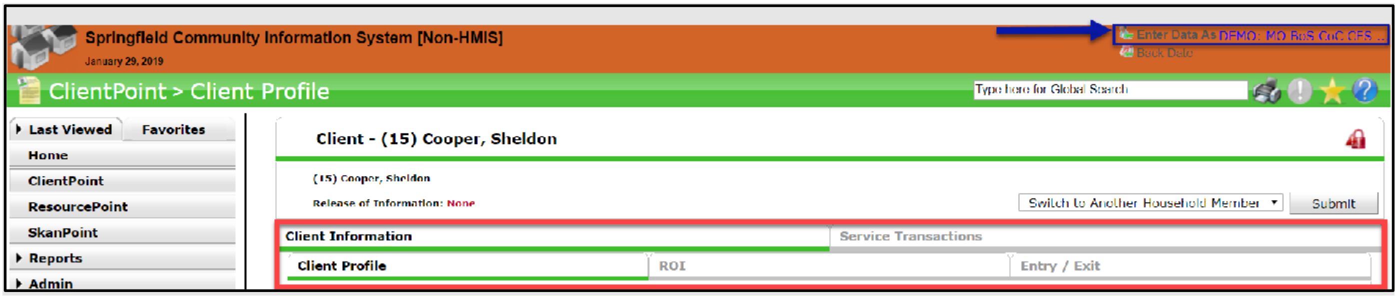
CLIENT INFORMATION

All client records are organized by tabs. You may see more tabs (Ex. 1), or less (Ex. 2), depending on your Enter Data As (EDA) provider. The order of the tabs is also dependent on your EDA provider. This introduction provides a brief overview of the following **Client Information** tabs: **Client Profile**, **ROI**, and **Entry/ Exit**.

Example 1:



Example 2:



CLIENT PROFILE TAB

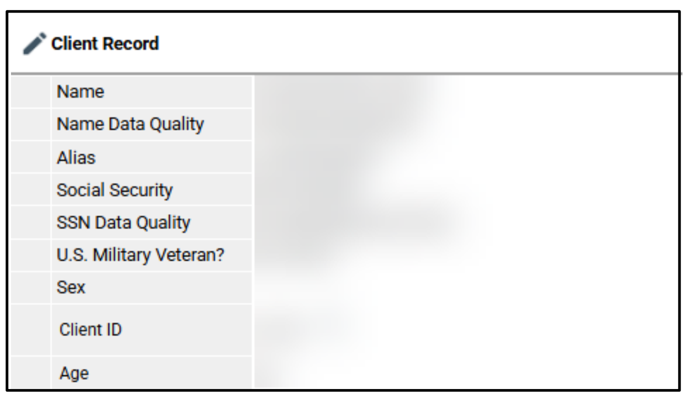
The **Client Profile** tab is a snapshot of information that may have been documented on the tab itself or auto-populated from another area of entry in the client's record. This tab contains the following information:

- Client Record
- Client Demographics
- Contact Information
- Client Notes
- Attachments
- Incidents

CLIENT RECORD

The client record will always display on the Client Profile tab and contains the following client data:

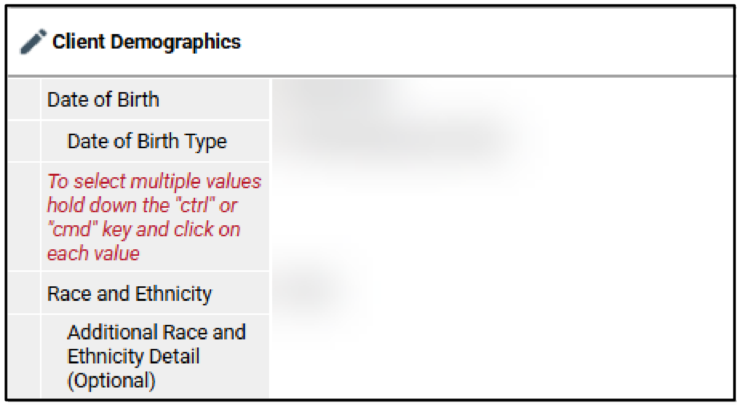
A. Name
B. Name Data Quality
C. Alias
D. Social Security Number
E. SSN Data Quality
F. U.S. Military Veteran?
G. Sex
H. Client ID
I. Age



CLIENT DEMOGRAPHICS

The Client Demographics table is located directly under the Client Record and displays:

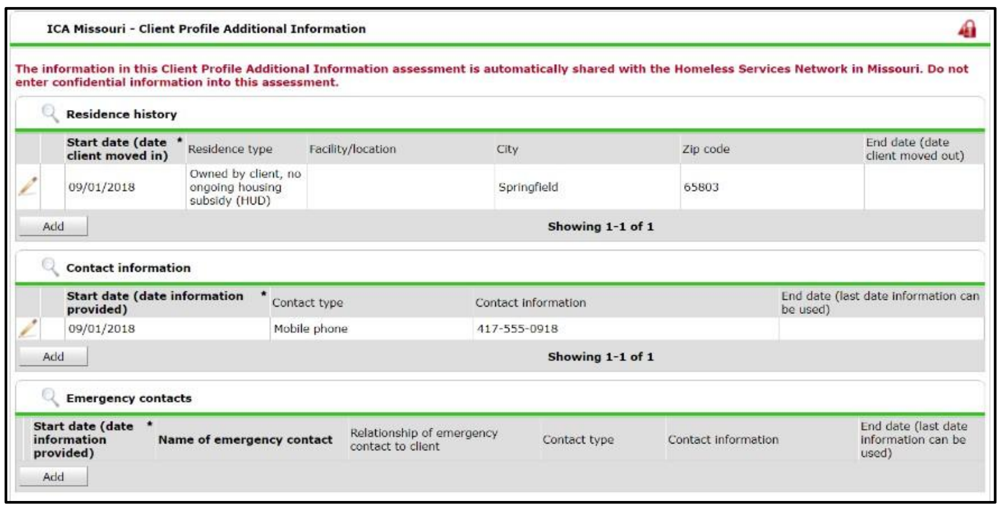
A. Date of Birth
B. Date of Birth Type
C. Primary Race
D. Secondary Race
E. Ethnicity



CLIENT PROFILE ADDITIONAL INFORMATION

Additional information found on the Client Profile tab, depending on your projects set-up, includes:

A. Residence History
B. Contact Information
C. Emergency Contacts



CLIENT NOTES, FILE ATTACHMENTS, AND INCIDENTS

The last 3 sub-assessments on the Client Profile tab are:

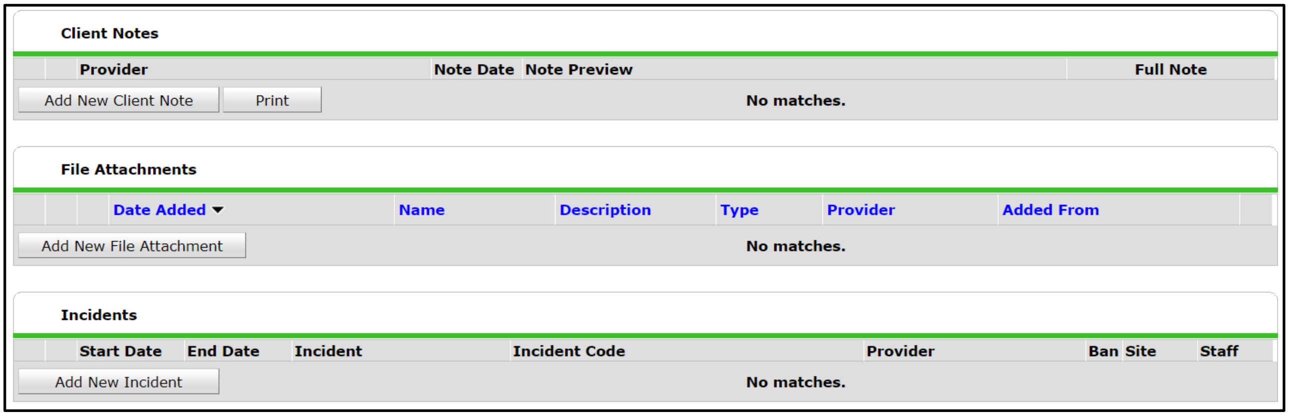
A. **Client Notes** – A space for case managers to add client notes. Again, confidential information should not be entered in the Client Notes sub-assessment; **Client Notes are visible to the entire Missouri Network**.

Client Notes is a space that allows end-users to free type; sensitive information (i.e. diagnosis) or subjective notes regarding a Client's attitude (i.e. just wants a hand-out) should never be entered here. An example of an appropriate Client Note might be, "client needs floor level space – no stairs".

B. **File Attachments** – Have a document that you would like to attach to your client's record. File Attachments allows you to attach scanned documents to the record.

File Attachments are visible to the Missouri Network and caution should be exercised when attaching documents.

C. **Incidents** – If you need to document an Incident, please feel free to do so in the Incidents sub-assessment. Incidents are only visible to your agency.

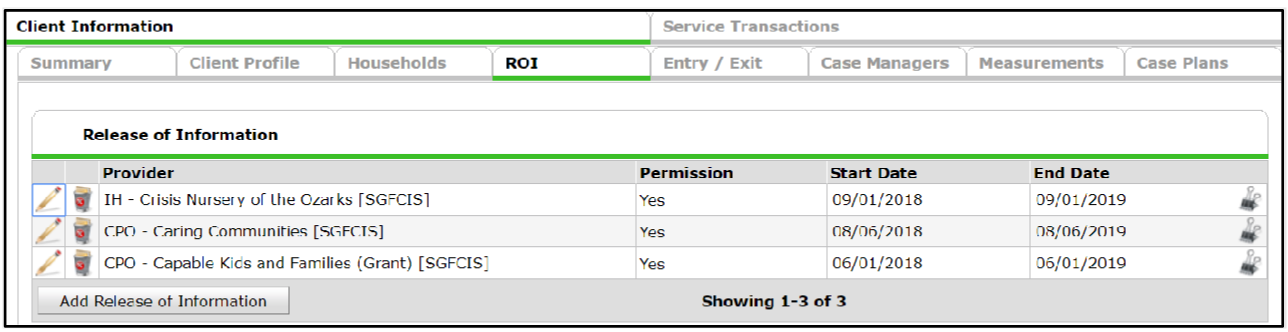


ROI TAB

Before entering any client information in ServicePoint a **Client Informed Consent to Share and Release of Information** (ROI) must be signed by the client. For reporting and auditing purposes, the ROI also needs to be entered in ServicePoint, this is done on the **ROI tab**.

To document an ROI in your client's record:

1. Click the **Add Release of Information** button



Complete the following fields on the Release of Information form (pictured on next page):

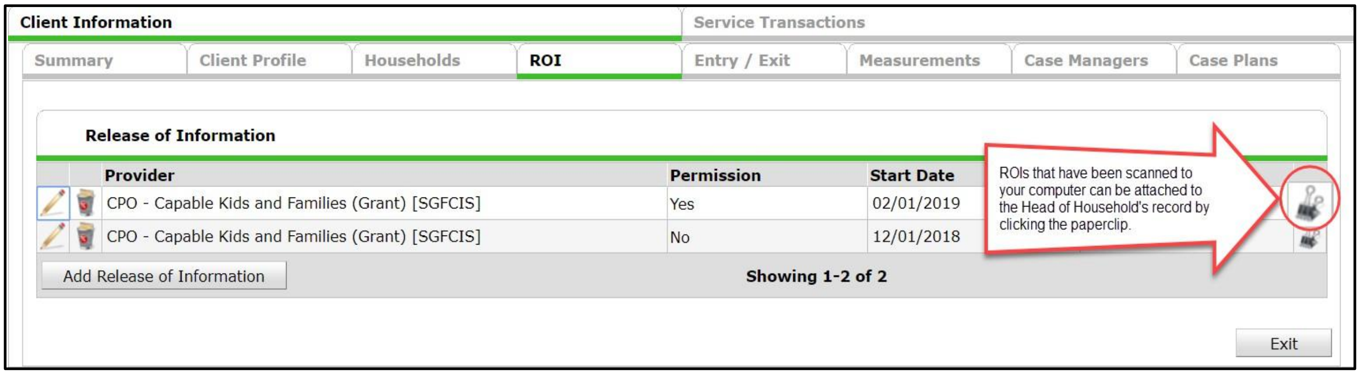
1. **Household Members -** Ensure that <u>all household members</u> have a check mark next to their name to avoid missing ROIs on reports
2. **Provider –** The provider name will auto-populate in the Provider field according to which Enter Data Provider you selected
3. **Release Granted –** Select "Yes" or "No", depending on whether the client has given permission to share their information
4. **Start Date –** The Start Date will auto-populate
5. **End Date –** Enter the End Date one year from the Start Date
6. **Documentation –** Select the type of documentation provided by the client. Signed consent is required for most providers, and verbal consent is limited to clients served by some coordinated entry providers. If you are not sure, please contact our helpdesk for clarification.

7. **Witness –** Add the name of the agency employee that witnessed the client signing the consent form or received verbal permission via phone. Note, this may not be the same individual entering the ROI in ServicePoint

When you are finished entering the ROI information, click **Save Release of Information**.

If a client refuses to sign the ROI, you must contact the ICA Help Desk to request a locked record be created *before* entering any client data into ServicePoint.

Tip: You can attach scanned ROIs to the Head of Household's record by clicking the paperclip (see image below).

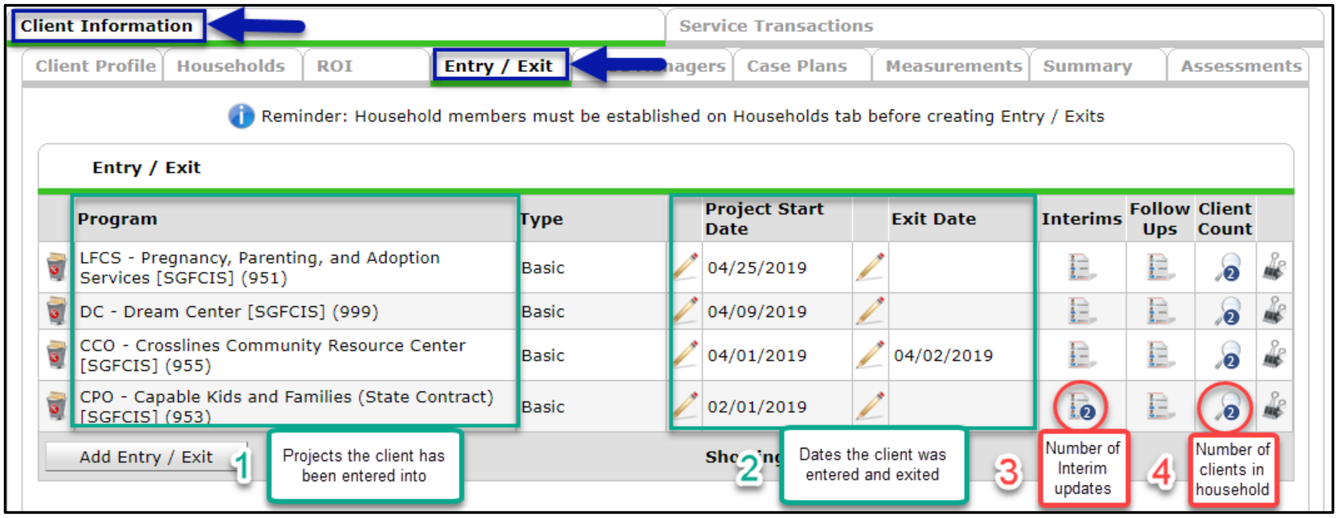


ENTRY/EXIT TAB

The workflow completed on the **Entry/Exit tab** differs from project to project. Most agencies enroll clients into projects, add Interims, and Exit clients from projects.

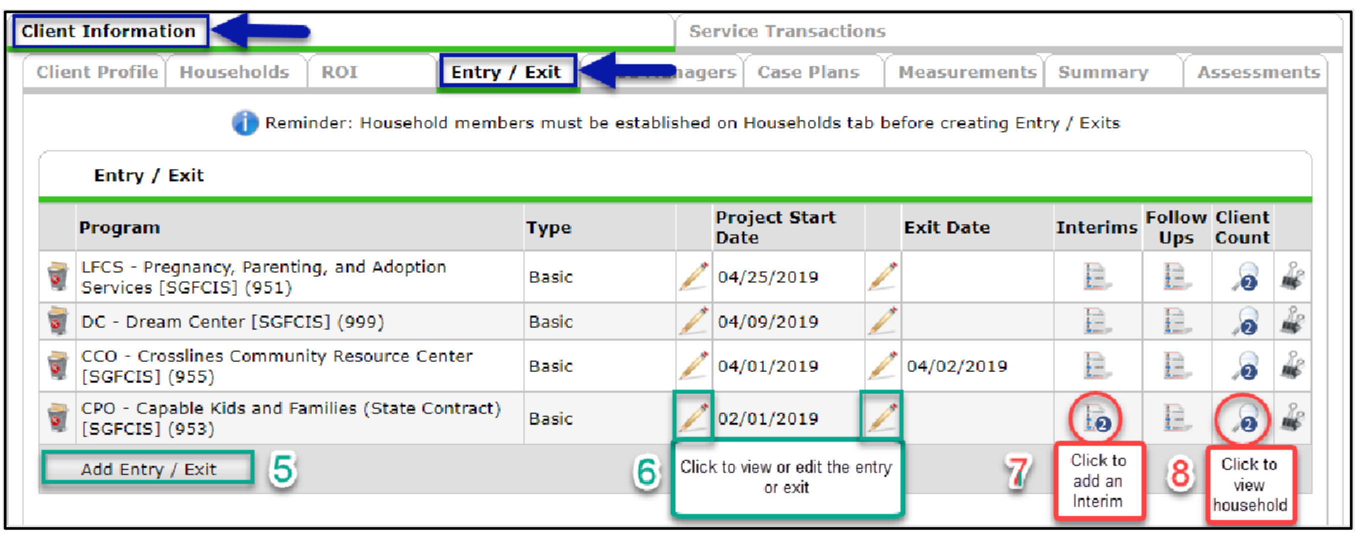
The diagram of the **Entry/Exit tab** below demonstrates how each row represents a client's enrollment in projects at various agencies. The Entry/Exit tab will display the following:

1. Projects (aka Programs) in which the client has been Entered
2. The date that a client Entered and Exited a Project
3. Number of Interim Updates completed between Entry and Exit
4. The number of clients in the household at the time of project enrollment



To navigate the Entry/Exit tab:

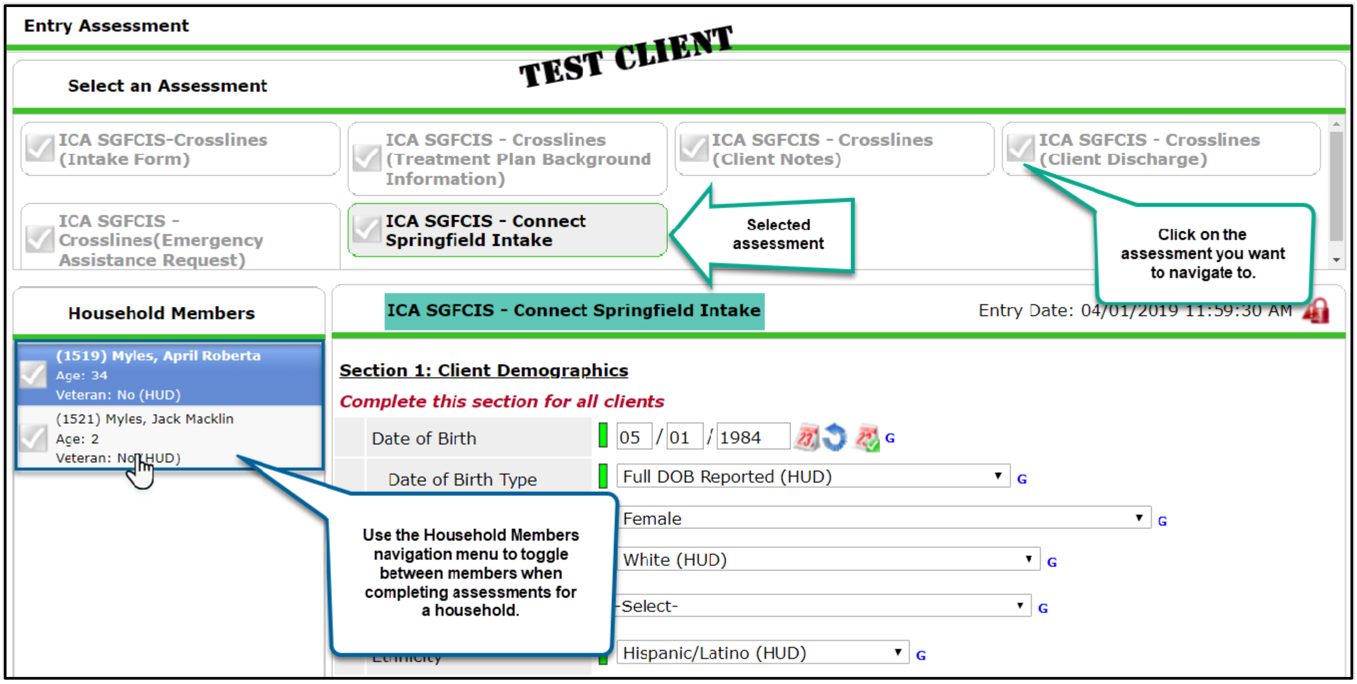
5. Use the **Add Entry/Exit button** to enter a client in a project
6. Use the **Edit icons** to edit or view an existing Entry or Exit for a specific project
7. Click the **Interims icon** to add an interim or edit an existing interim for a specific project
8. Click the **Client Count icon** to view a list of household members



ASSESSMENTS

Depending on your project, you may be required to complete one or more assessments during an Entry, Interim, or Exit. The image below demonstrates:

- How to switch from one assessment to another
- How to toggle between household members

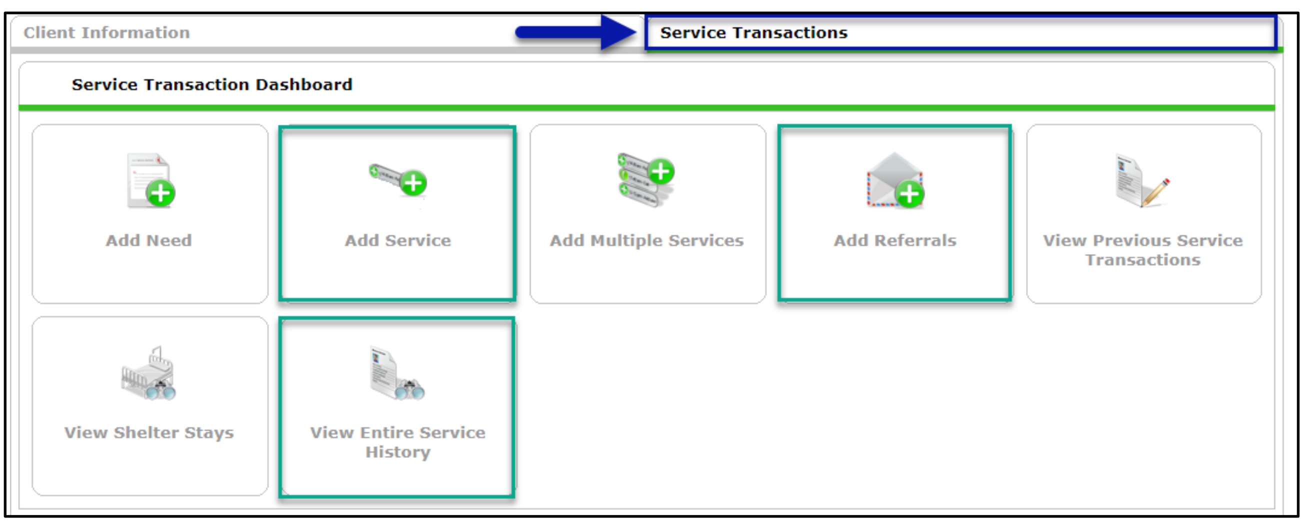


SERVICE TRANSACTIONS

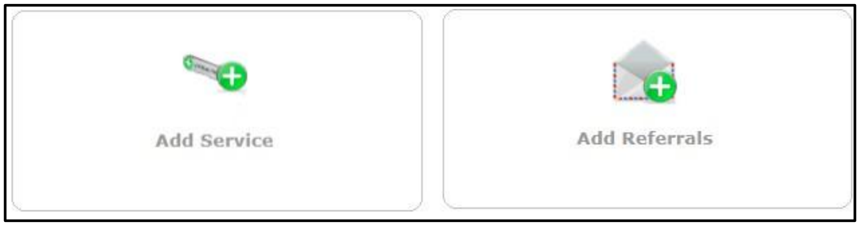
The **Service Transactions tab** is where you document Services and/or Referrals provided to a client/household. It may be helpful to note that a transaction is an exchange between people. In this case, your client has a Need and you provide a service to meet that need. Or, your client has a Need that your agency is unable to assist with so you refer your client to another agency that can meet their Need.

SERVICE TRANSACTIONS DASHBOARD

The pictorial below is an image of the Service Transactions Dashboard. The buttons on the dashboard allow you to complete actions (e.g. Add Service) and view transaction history (e.g. View Entire Service History).



SERVICE TRANSACTION ICONS

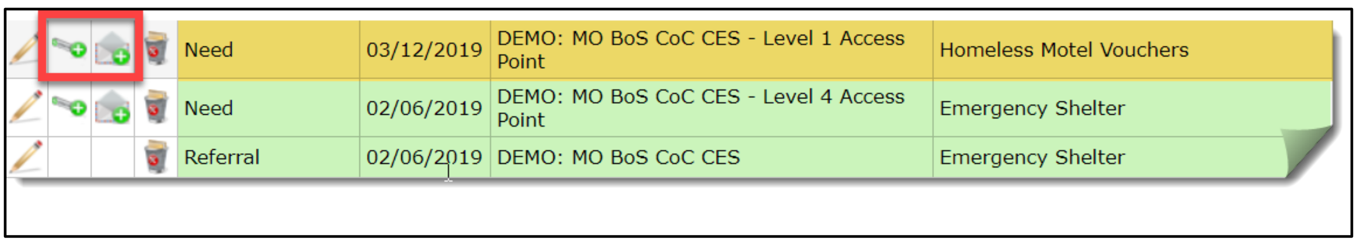


- **Add Service** – Represented by a green key with a plus sign, the Add Service icon is seen on the Service Transactions Dashboard and enables you to add a service and need to client records simultaneously.

- **Add Referrals** – Represented be an envelope with a plus sign, the Add Referrals icon is also seen on the Service Transactions Dashboard and allows you to document referrals, and potentially send referrals electronically, to other ServicePoint agencies.

When viewing a client's **Entire Service History**, the Add Service icon can be used to add a service to a lone Need that you have provided a service for. The Add Referrals icon can be used to add a referral to a lone Need, if you need to refer the client to another agency.

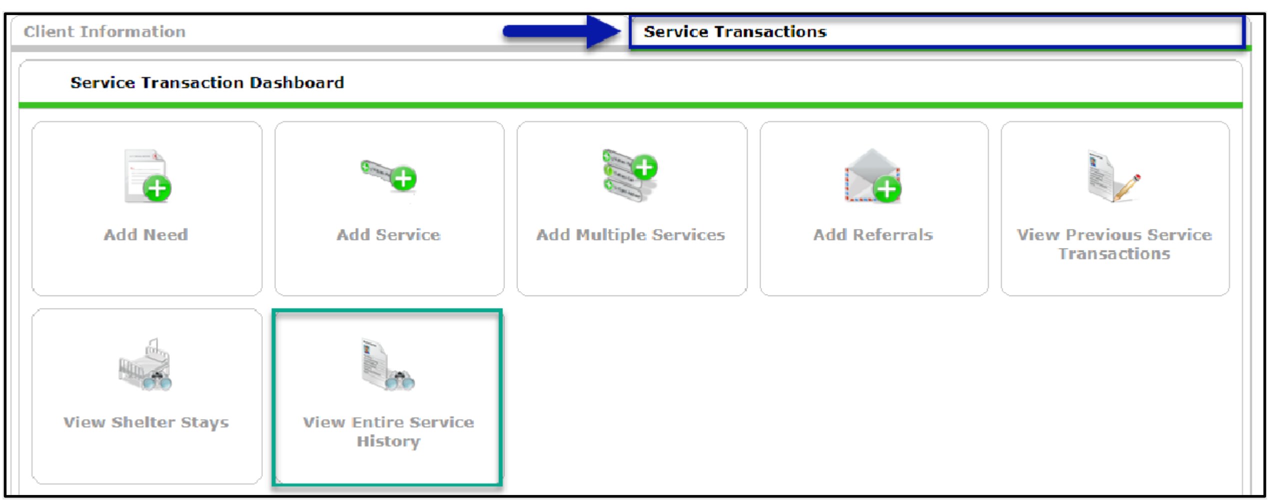
Remember, if you're adding a complete transaction (Need/Service or Need/Referral), simply click Add **Service** or **Add Referral** and ServicePoint will automatically attach the Need for you.



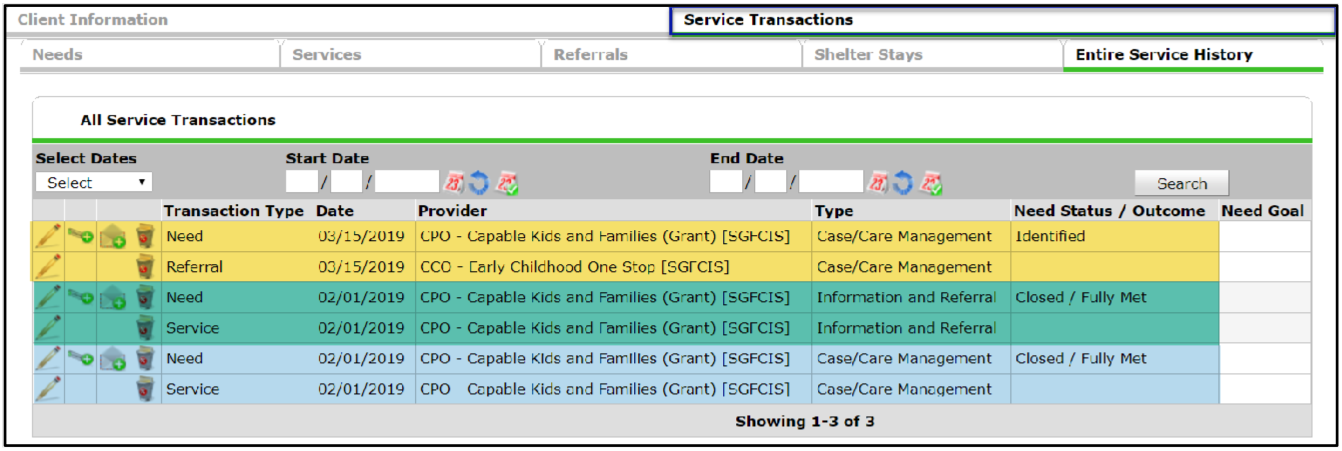
Need	03/12/2019	DEMO: MO BoS CoC CES - Level 1 Access Point	Homeless Motel Vouchers
Need	02/06/2019	DEMO: MO BoS CoC CES - Level 4 Access Point	Emergency Shelter
Referral	02/06/2019	DEMO: MO BoS CoC CES	Emergency Shelter

VIEW ENTIRE SERVICE HISTORY

Click the **View Entire Service History** box to view a client's history of Needs, Services, and Referrals.

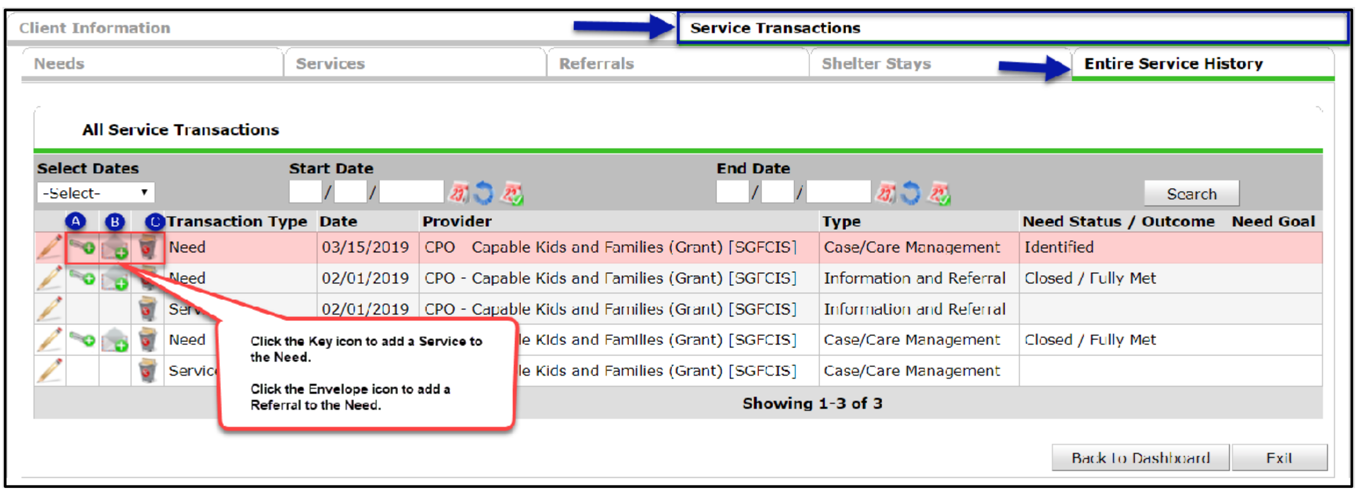


When you view the entire service history, you will see a Need associated with each Service or Referral that was added.



If a Need does not have a corresponding Service or Referral, you can:

A. Click the **Key icon** to add a Service provided by your agency
B. Click the **Envelope icon** to add a Referral
C. Or, if the Need is an error that should be removed, use the **Delete icon** to remove it



If you want to narrow a client's history to just Needs, Services, or Referrals, use the tabs located above the transaction history.

To return to the **Service Transactions Dashboard**, pictured at the beginning of this section, click the **Back to Dashboard button**.