Quick Reference Guide
Community ServicePoint 5.X—General Information

Logging on to ServicePoint

1	Double click the Internet Explorer icon on your desktop.
2	In the address bar, enter the following: https://sp5.servicept.com/carrollcounty/com.bowmansystems.sp5.core.ServicePoint/index.html This is the LIVE site. The ServicePoint log in screen displays. The training site address is as follows: https://sp5.servicept.com/carrollcounty_training/com.bowmansystems.sp5.core.ServicePoint/index.html#searchUsers;refresh=true
3	Enter your User Name.
4	Enter your Password. When logging on for the first time, use the temporary password provided to you. The system then prompts you to create your own password. Passwords must be 8 to 16 characters in length, must contain at least two numbers, and are case sensitive. Every 45 days, ServicePoint prompts you to change your password.
5	Click Login or press Enter

Navigation Icons

Icon	Description
	Delete
	Edit
	View
	Open
	Open with Exceptions
	Closed
	Closed with Exceptions
G	Goal
	Answer Age Bar: Turn red when answer is older. Clicking shows history.
	Add

Navigation Tips

Tab	Moves cursor to the next field.
Shift Tab	Moves cursor to the previous field.
Page Up	Moves cursor to the top of the screen in increments.
Page Down	Moves the cursor to the bottom of the screen in increments.

NOTE: *After logging into ServicePoint and then not working in it (actively clicking buttons and entering information) for 30 minutes, the system automatically logs you out.*
ALWAYS save your work and log out of the system before leaving your computer unattended!

NOTE: *Use the buttons on the ServicePoint Navigation Bar to navigate throughout the system.* ***Do not use the browser Forward and Back buttons*** *as this will not show refreshed screen information.*

Entering a Client Record

1	Click the **ClientPoint** button on the navigation bar. Remember to click **Enter Data As** (top right) if you need to enter as another provider.
2	If you know the Client ID: Enter the Client ID Number at the bottom of the search screen and click **Submit**.
3	New Client (or unknown ID): In the *Name* fields, enter the first letter of the first name and the first three letters of the last name.
4	Click **Search** to continue.
5	If there is a match, select the existing client record by clicking on the name. Go to Step 12. If there is no match, proceed to the next step to search again. If completed all search attempts, go to step 7 to add remaining information.
6	Search by name, or last four digits of SSN. Go to Step 4.
7	Make sure you go back and enter First Name, Middle Initial, Last Name and Suffix, if appropriate. Do not place spaces in the name or around a hyphen.
8	Only enter the last four digits of the SSN. If your providers intake form (main screen) asks for SSN again, add the full # there, and select an option in *SSN Data Quality* (if applicable).
9	Click **Add Client With This Information**
10	In the *Date of Birth* field, enter birth date. If you do not know the birth date, use 1/1/estimated year of birth. Please use 4 digit years, not 2.
11	Complete *Gender, Primary Race, Secondary Race* (if appropriate) and *Ethnicity* fields.
12	The new client record will appear. Continue with data entry with the Universal Data Assessment (UDA).
13	Don't forget to save your work!

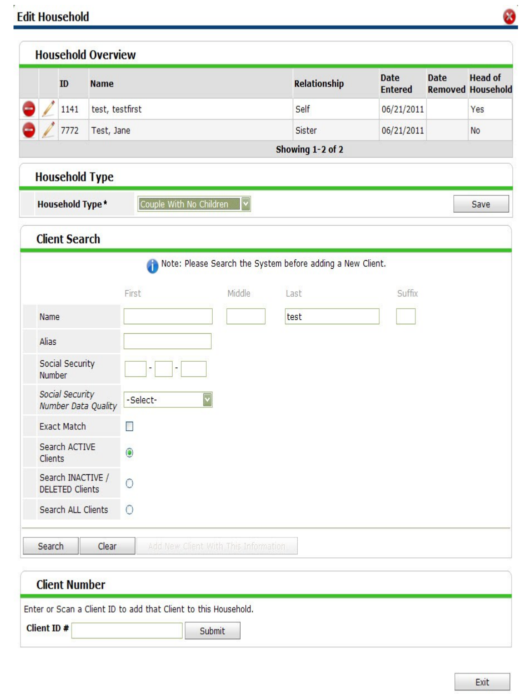
NOTE: *After working with a client in ClientPoint, the record for that client will become available under **Last Viewed** in the left-hand navigation bar. This will allow you to go straight to ClientPoint functions for the recent clients with whom you were working (holds the last ten). When you move out of ClientPoint into another area of ServicePoint you can use this section to return to a client record without searching again for that client. Also, if there are clients you work with frequently you can save these to your **Favorites** (next to **Last Viewed** in the navigation bar) by clicking the gold star in the top right corner while the record is open.*

Creating a Household

1	Click the **ClientPoint** button on the navigation bar.
2	Open the client's record, or create a client record if necessary.
3	Click the **Households** tab at the top of the client record.
4	Click **Start a New Household**. A popup window called *Add a New Household* appears.
5	In the *Household Type* field, select the appropriate option.
6	In the *Head of Household* field, select Yes or No.
7	In the *Relationship to Head of Household* field, select the appropriate option.
8	The *Date Entered* field automatically populated with the current date. This can be changed to reflect the actual date of household creation or data collection.
9	Click **Save** to create a household containing your client. A popup called *Edit Household* now displays.
10	If adding more clients to the household, do it here. There is a search screen like at the start of ClientPoint that will allow you to locate or create the records of other household members.
11	You client's household has now been created.

Modifying a Household Type

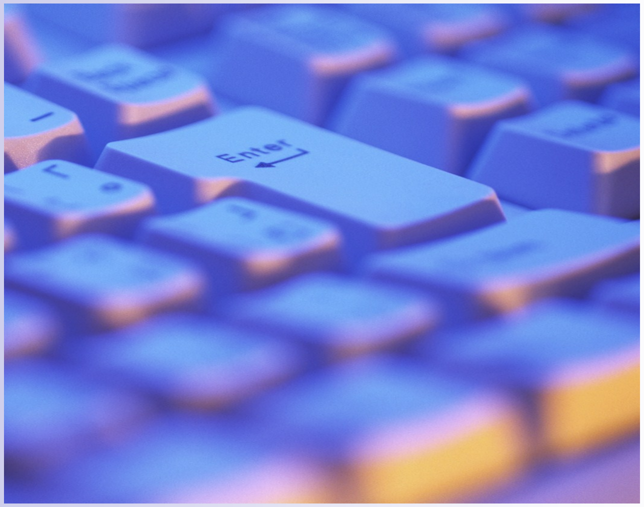
1	In the *Households* tab, under *Household Overview*, the client's household(s) will be listed. Click the **Edit Icon** next to the household you wish to modify.
2	The *Edit Household* popup window will display.
3	The household type can be modified by selecting a new type from the *Household Type* dropdown box.
4	Click **Save**.
5	New household members can also be added at this time in the *Edit Household* popup.
6	The new household members will display under *Household Overview*.
7	Click **Exit** to return to the record.



NOTE: *In most cases, a client should be active in only one household. Be aware of this when creating a household, or adding a client to a household. If you see that they are part of another household, make sure you fill out the Date Removed field for one of the households or contact your Agency Admin or System Admin (cwellman@ccg.carr.org) if you do not have the permissions to modify this data.*

Adding Clients to an Existing Household

1	Click the **ClientPoint** button in the navigation bar.
2	Access a client's record. Create a client record or open an existing one.
3	Click on the *Households* tab at the top of the record.
4	Click **Search to Add this Client to an Existing Household**.
5	In the *Search* popup, search for a relative that is already part of a household. Click **Show Advanced Options** for the regular client search screen. Click **Search**.
6	Select relative from list of possible matches by clicking the **Add** icon.



7	The *Add New Household Member* popup displays.
8	In the *Head of Household* field select Yes or No. This will default to No when a Head of Household has already been determined for the household. If you attempt to add multiple heads of household to one household you will receive a warning, but will be allowed to proceed if you choose.
9	In the *Relationship to Head of Household* field, select the appropriate option.
10	The *Date Entered* field automatically populated with the current date. This can be changed to reflect the actual date of household creation or data collection.
11	Click **Save**.
12	To add more clients to the household, click the **Edit** icon next to the household.
13	Click **Exit** when finished.

Quick Reference Guide
Community ServicePoint 5.X—ROIs, Backdating, Entry/Exits

Entering an ROI

1	Click the *ROI* tab near the top of the client record.
2	Click **Add Release of Information**. A *Release of Information* popup will appear.
3	If the release covers other household members, check any or all of the household members.
4	In the *Provider* field, select the appropriate provider.
5	In the *Release granted?* field, select Yes or No.
6	The *Start Date* field is populated with the current date. It can be changed to reflect the actual start date of the ROI.
7	Enter the end date. (Required)
8	In the Documentation field, select the appropriate option.
9	Enter a witness, if required.
10	Click Save Release of Information.

Backdating

1	Click **Backdate** in the top right corner of the screen.
2	The *Backdate Mode* popup window displays.
3	Enter the date the information was actually gathered.
4	Click **Set Backdate**.
5	Enter data as you would if you were entering it for the current date.
6	When completed, click the **red circle next to the date** in the top right corner to exit Backdate Mode.

NOTE: *When Backdating, the title bar displays in* ***bright yellow****. Look for this if you should be backdating and make sure it is no longer yellow if you intended to exit* Backdate Mode. *Also, the date the data is being entered for shows next to* Backdate Mode *in the top right corner when* Backdate Mode *is activated.*

NOTE: *Other features of ServicePoint may be utilized prior to Program Exit. See the attached job aids i.e. Services Transactions, Case Management, ShelterPoint and Skan-Point for further instructions.*

Entering a Client into a Program

1	Click the **Entry/Exit** tab at the top of the client record.
2	Click **Add Entry/Exit**. *An Entry/Exit* popup will display.
3	Select any or all of the household members that are also entering the program.
4	In the *Provider* field, select the appropriate provider.
5	Select the *Type* of entry.
6	Enter the program entry date and time.
7	Click **Save and Continue**.
8	Add information as appropriate.
9	Click **Save and Exit** to return to the client record.

Exiting a Client from a Program

1	Click the **Entry/Exit** tab at the top of the client record.
2	Click the **Edit** icon next to the *Exit Date*.
3	If other household members were included in the program entry, their names will be listed for program exit.
4	The *Exit Date* and *Time* should be changed to reflect actual date/time of program exit.
5	In the *Reason for Leaving* field, select an option.
6	In the *Destination* field, select an option.
7	Click **Save**.
8	Add information as appropriate.
9	Click **Save and Exit** to return to the client record.

Creating a Need

1	Click **Service Transactions** tab at the top right of the client record.
2	Click **Add Need** on the *Service Transaction* dashboard.
3	Select household members to be included in the need by checking each household member's name.
4	The *Date of Need* field populated with the current date and time. It can be changed to reflect the actual date of the need.
5	In the *Provider* field, select a provider.
6	In the *Need* field, select a need from the dropdown or use **Look Up** to search AIRS taxonomy.
7	In the *Amount if Financial* field, a dollar amount can be added for the need.
8	The *Notes* field can contain notes related to the need.
9	In the *Status* field, select a status.
10	In the *Outcome* field, select an outcome.
11	Select an option in *If Not Met, Reason*, if applicable.
12	To add a Service or Referral, click **Save and Continue**.
13	To return to the client record, click **Save and Exit**.

NOTE: *Every Service should have a corresponding Need, but every Need does not necessarily have to have a Service. (There must be a Need for a Service to be provided, but there* could *be a Need that was unable to be met.)*

Providing a Service (after the need)

1	Click **Add Service** on the *Service Transaction* dashboard (or you may have clicked **Add Service** from **Save and Continue** when adding your Need).
2	Select household members to be included in the need by checking each household member's name.
3	In the *Provider* field, select a provider.
4	The *Start Date* field populated with the current date and time. It can be changed to reflect the actual date of the need.
5	Enter an *End Date*, if applicable.
6	In the *Service Type* field, select a service from the dropdown or use **Look Up** to search AIRS taxonomy.
7	Select a *Provider Specific Service*, if applicable.
8	The *Service Notes* field can contain notes related to the service.
9	Add a **Funding Source**, if applicable.
10	Enter data in *Service Costs* as appropriate.
11	If marking for follow up, enter a *Projected Follow Up Date* and select a provider and user under *Follow Up User*.
12	In the *Status* field, select an option.
13	In the *Outcome* field, select an option.
14	In the *If Not Met, Reason*, field select an option if applicable.
15	Click **Save and Exit** to return to the client record.

Quick Reference Guide
Community ServicePoint 5.X—Service Transactions: Referrals, ResourcePoint

Entering a Referral

1	Click **Add Referrals** on the *Service Transaction* dashboard (or you may have clicked **Add Referral** from **Save and Continue** when adding your Need).
2	Select household members to be included in the referral by checking each household member's name.
3	Select up to 5 needs from the *Service Code Quicklist* or use **Service Code Look-Up.**
4	The *Date of Need* field populates with the current date and time. It can be changed to reflect the actual date of the need.
5	Select a Provider to which you would like to refer the client. Use either the *Referral Provider Quicklist* or *Search for Providers*.
6	The *Needs Referral Date* field populated with the current date and time.
7	Enter a *Follow Up Date* and Provider and User as a *Follow Up User*, if applicable.
8	Click **Check to Notify Service Providers by Email**, if you would like to notify them by email. The emails will go to the Provider's primary contact if they have an email address in ResourcePoint.
9	Click **Save All** to return to the client record..

NOTE: *What is the AIRS Taxonomy? The AIRS (Alliance of Information and Referral Systems) Taxonomy is a classification system comprised of 8,000 terms that allow providers to use the same term for the same service. AIRS is the most common taxonomy used by HMIS agencies and other human services organizations.*

Viewing/Editing Past Needs/Services

1	Access a client record.
2	Click the **Service Transactions** tab.
3	The default view is *Previous Needs*. To change view choose another tab from the top (*Services, Referrals, Shelter Stays, Entire Service History*).
4	To view or edit any of the items, click the **Edit** icon.
5	Edit information as necessary.
6	Click **Save and Exit**.

ResourcePoint

1	Click **ResourcePoint** on the left-hand navigation bar.
2	Search for a Provider by Provider ID # or Keyword, or click **Show Advanced Options**.
3	In Advanced Options you can search by City, County, State, Zip or use the **Lookups** to search the taxonomy.
4	Click **Search**.
5	Hover your cursor over a Provider to see a summary of the Provider's profile or click the Provider name to see the full profile.
6	Click **Exit** when finished.

Creating a Goal from an Assessment

1	In any assessment, click the G next to an assessment question.
2	The *Add Goal* popup window displays.
3	In the *Provider* field, select the appropriate provider.
4	The *Date Goal* was Set field populates with the current date. Change as appropriate.
5	In the *Classification* field, select an option.
6	In the *Type* field, select an option.
7	In the *Target Date* field, enter the date the goal should be completed.
8	In *Status* field, select an option.
9	The system automatically enters in *Case Note*: "Goal added with editing…". Add additional case notes as appropriate.
10	Click **Add Goal**. The window will close and you will be returned to that assessment.

NOTE: *Goals should not be deleted unless entered incorrectly. Deletion of goals also deletes affiliated case notes and action steps.*

Creating a Goal through Case Plans

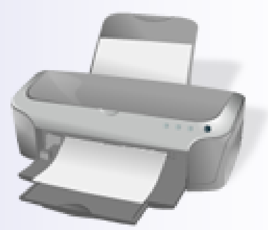
1	From the client record, click the **Case Plans** tab.
2	Click **Add Goal**.
3	Select household members to be included in the goal by checking each household member's name.
4	In the *Provider* field, select a Provider.
5	In the *Case Manager* field, select a Case Manager.
6	Follow Steps 4-8 in `Creating a Goal from an Assessment`.
7	In *If Closed, Outcome*, select an outcome and set a closing date, if applicable.
8	In If Partially Complete, select a percentage, if applicable.
9	Enter a *Follow Up Date* and Provider and User as a *Follow Up User*, if applicable.
10	Click **Add Goal**.

Editing a Goal

1	From the Case Plan screen, click the **Edit** icon next to the appropriate goal.
2	Edit the goal information as appropriate.
3	Click **Save and Exit**.

Adding Case Notes

1	Under *Case Plans* in the client record, access case notes by clicking the notepad to the right of the appropriate goal.
2	The *Case Notes* popup window appears.
3	To edit the case notes, click the **Edit** icon at the left of the note.
4	To add a new case note, click **Add Case Note**.
5	Enter information as appropriate, click **Save Case Note**.



Printing a Case Plan

1	Access the client's record. Click the **Case Plans** tab.
2	Click **Print Case Plan**.
3	To print a specific date range, select *Date Range* and enter your start and end dates.
4	Click **Print**.

Adding Action Steps

1	In Case Plan—Edit Goal screen, click **Add Action Step**.
2	Select household members to be included in the action step by checking each household member's name.
3	Enter Provider.
4	The *Date Action Step was Set* field populates with the current date.
5	Follow Steps 7 and 8 in `Creating a Goal from an Assessment`.
6	In *If Closed, Outcome*, select an outcome and set a closing date, if applicable.
7	Enter a *Follow Up Date* and Provider and User as a *Follow Up User*, if applicable.
8	Click **Save Action Step**.

Assigning a Case Manager

1	Click the **Case Manager** tab at the top of the client record.
2	Click **Add Case Manager**.
3	Enter the name of the Case Manager, or search for a User.
4	Enter the Case Manager's title, phone number and email.
5	Select a Provider.
6	*Start Date* populates with the current date. Change if appropriate.
7	Enter an *End Date* if/when appropriate.
8	Click **Add Case Manager**.

Viewing Bedlists

1	Click the **ShelterPoint** button on the navigation bar.
2	Select a Provider.
3	Select a bedlist to view from the *Unit List* dropdown.
4	Click **Submit**.

Reserving a Bed

1	(Continue from above: `Viewing Bedlists`) Click **View All** on the ShelterPoint dashboard.
2	In *Reservations for Unit List*, click **Add Reservation**.
3	Search for client in the popup.
4	Edit any information and click **Save**.

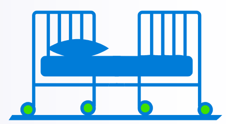
Checking in Clients with Reservations

1	(Continue from above: `Viewing Bedlists`) Click **Check In Reservation** on the ShelterPoint dashboard.
2	Click the bed with the green plus to the left of the reservation.
3	The *Date In* field populates with the current date.
4	Enter any *Supplies Given* or assign a client *Locker #*.
5	In the *Codes/Notes* field enter notes as appropriate.

***NOTE:** Additional household members must have a record created in ClientPoint in order to include them for check-in.*

***NOTE:** After midnight, to add a client to the previous day's census, click **Midnight Check In** next to the date.*

***NOTE:** To hold a bed (in the bedlist) click HOLD next to the bed and the bed will be removed from the list of available beds.*



Checking in Clients without a Reservation

1	In the bedlist, click the **EMPTY** link next to the bed to be assigned. If not beds are available, click **EMPTY** on an Overflow bed.
2	Search for the client by name or ID number. If found select the client.
3	If you no record matches, enter as much info as possible and click **Add Client With This Information**.
4	Follow Steps 3-5 in `Checking in Clients with Reservations`.
5	If client has household members to check-in, click **Check In Additional Family Members**.
6	Click the checkbox next to each person to be checked in and click **Assign Bed** to select a bed for each person.
7	Select a bed from the dropdown.
8	Choose any services that have been provided to the client upon check-in. *Multiple Services* applies to services provided to multiple household members checking in together.
9	Click **Save and Exit**.

Confirming Clients

1	In *Shelter Inventory Information* (bedlist screen) click **Update Confirmation List**.
2	Click the check box next to the client you would like to confirm (or click **Check All**) then click **Confirm**.
3	A popup will tell you that you successful confirmed the clients. Click **OK**.

Checking Clients Out

1	In *Shelter Inventory Information* (bedlist screen) click **Transmit Today's Check Out List**.
2	Click the check box next to the client you would like to confirm (or click **Check All**) then click **Check Out**.

Note: *Case Managers, Agency Administrators, Executive Directors, and System Administrators I & II are the only user levels who have access to this reporting tool.*

Opening ReportWriter

1	Click **Reports** on the left navigation bar.
2	ReportWriter is located at the bottom of the dashboard under *Custom Reports*.
3	Click **ReportWriter** on the dashboard to open.

Running a Saved Report

1	Upon entering ReportWriter a list of reports displays these are your agencies saved reports, if you have any.
2	To run a saved report, click the **View** icon next to the appropriate report.

Creating a New Report

1	At the bottom of the saved report list, click **New Report**.

ReportWriter Tabs

Tables	The **Tables** tab will be the default display when ReportWriter opens (if running a new report). Click the checkboxes next to all the tables, assessments and sub-assessments from which you wish to pull data.
Fields	Once you have selected the desired tables from the **Tables** tab, use this tab to select the fields you want for your report. Each selected table will appear with their respective fields.

ReportWriter Tabs (continued)

Filters	This tab allows you to filter information that appears in the report. For example, if you have selected the Services table from the **Tables** tab, you can filter the report by ProvideStartDate. To do this, click **Add Filter.** Then select the table, field and filter. Click **Save.**
Counting	This tab allows you to view summary details of your report, such as a total number of unique/duplicated clients as well as a breakdown of your data by certain fields.
Preview	(The **Preview** tab displays by default if you are running a saved report.) This tab will display the results of your report. You can download the report from within this tab by clicking **Download Full Report**.
Options	The **Options** tab allows you to change the sorting of your report, or the column order. This is also where you would save the report for future access through the saved report list.

Note: *By default, the "Clients.Inactive Equals No" filter will be added to all report. This prevents all inactive clients from being included in the report. To remove this filter, simply click the red circle next to it.*

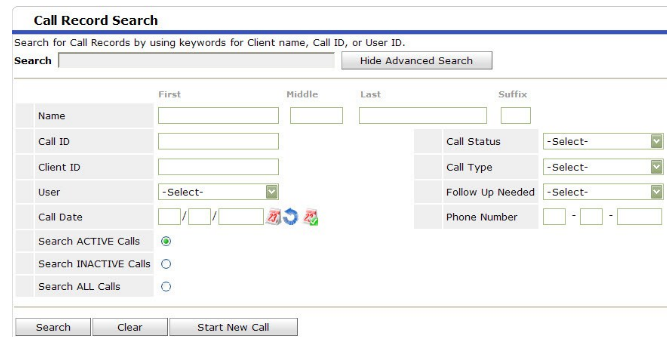
Adding a Call Record

1	Click on **CallPoint** in the navigation bar.
2	Click **Start New Call**.
3	If you want to link the call to a client record, click the green plus sign.
4	Complete *Call Type, Caller Type, Call Status*.
5	If adding Needs and Referrals to the call, click the **Service Transactions** tab.
6	Complete any assessment questions as appropriate.
7	If follow up is required, enter follow up information.
8	Click **Save and End Call**.

Note: *The* Caller, Call Type *and* Call Status *fields are required and are the minimum information that a call record must contain to be saved.*

To View Your Own Calls

1	Click the checkbox next to **Show MY Calls Only**.
2	Click **Search**.



To Search Call Records

1	Type in a keyword and click **Search** OR click **Show Advanced Search**.
2	In Advanced Search you have the options of searching by name, call ID, client ID, the user who took the call, call date, call status, call type, if a follow up was needed, and phone number. You can also choose whether to search active clients, inactive clients and all clients.
3	Enter your criteria and click **Search**.
4	The screen will refresh with any calls meeting your criteria.