




Department of County Human Services
SUN Service System & Community Services

SUN Community Schools New User Training

A screenshot of a web-based login interface. At the top is the SERVICEpoint logo with the tagline "Connecting your community." Below this is a header "NW Social Service Connections". The main section contains a "User Name" label next to a text input field, and a "Password" label next to a password input field. A "Login" button is positioned to the right of the password field. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". Further down, a note states "System use requires your compliance with the [terms and conditions](#)". At the bottom, the copyright notice reads "©1999-2011 Bowman Systems L.L.C. All Rights Reserved".

 **SERVICEpoint™**
Connecting your community.

**NW Social Service
Connections**

User Name

Password

Login

Forgot your username or password?
Contact your agency administrator

System use requires your compliance
with the [terms and conditions](#)

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What is ServicePoint?

ServicePoint is a web-based data collection tool that contains client demographic and activity information for SUN Community schools, as well as many other programs.

The web address is: portland.servicept.com

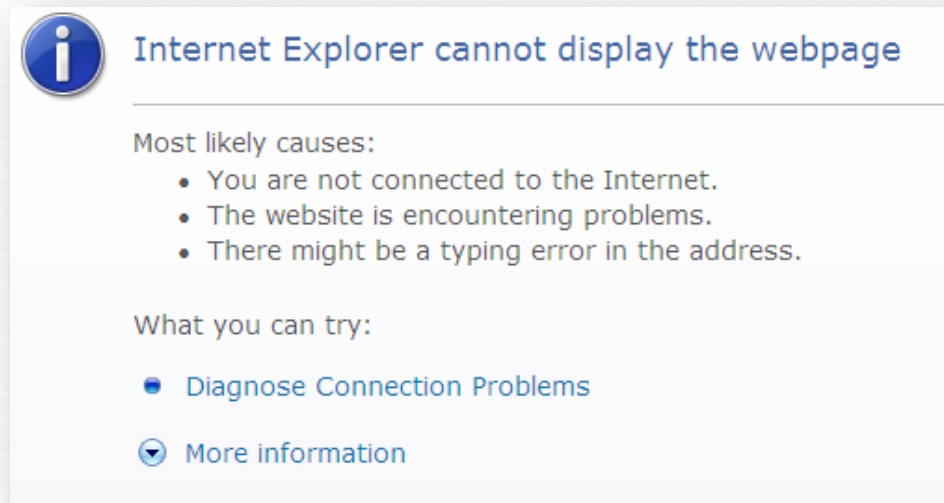
System Requirements

- **Processor**
 - Dual-Core processor recommended
- **Physical Memory**
 - 2 Gigabytes of RAM for XP (1G minimum)
 - 4 Gigabytes of RAM for Vista/Windows 7 (2G minimum)
- **ServicePoint can be used with the following Browsers:**
 - Google Chrome
 - Firefox 3+
 - Internet Explorer 8 (slowest)

Security Certificate (PKI)

Your computer will not connect to ServicePoint unless it has a **security certificate (PKI)** installed. Without it, you will only see one of the screens below, depending on your browser:

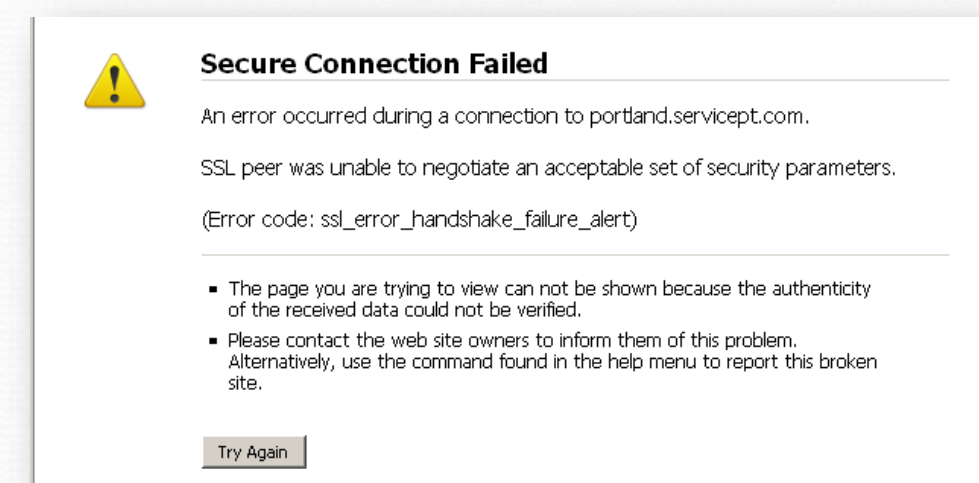
Internet Explorer



Google Chrome



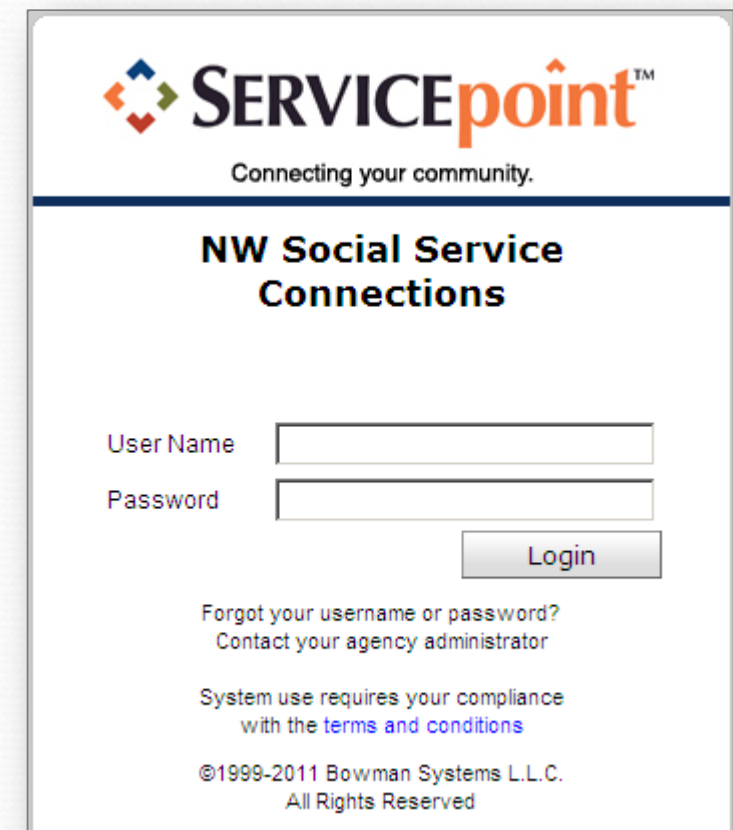
Mozilla Firefox



If you see one of these screens, contact us and we will send you a PKI file with instructions for installation.

Logging On

- Your User Name and a temporary password will be issued during this training, once you've signed a confidentiality and security agreement.
- Because **ServicePoint** contains sensitive client data, all data added, edited, and deleted can be tracked by your User Name.
- If you attempt to log in more than three times without success, your account will be inactivated.



The screenshot shows the ServicePoint login page. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "NW Social Service Connections". The login form includes fields for "User Name" and "Password", followed by a "Login" button. Below the button are links for "Forgot your username or password? Contact your agency administrator" and "System use requires your compliance with the terms and conditions". At the bottom is the copyright notice "©1999-2011 Bowman Systems L.L.C. All Rights Reserved".

Contact the **ServicePoint Helpline** at 503-240-4408 to have your account reactivated.

Passwords

- You will have to change your password the first time you log in.
- Passwords must be at least 8 characters long, and include two numbers or symbols.
- Your password will expire every 45 days, and you will be asked to create a new one.
- If you are locked out at any time, the ServicePoint Team will issue you a temporary password. You will be asked to change it when you attempt to log in again.

Navigating ServicePoint

ServicePoint Home Screen

SERVICEpoint
Connecting Your Community.

NW Social Service Connections
Multnomah County - SP
March 28, 2016

Katie Boldensmith
System Admin I

Mode: Shadow
 Enter Data As
 Back Date
 Connect To ART

Home > Home Page Dashboard

Type here for Global Search

Last Viewed | **Favorites**

Home
ClientPoint
ResourcePoint
FundManager
ShelterPoint
ActivityPoint
Reports
Admin
Logout

System News (3)

Date	Headline
10/06/2011	NWSSC Documents
01/01/2011	NWSSC HMIS Contact information
01/11/2005	Please use the Training Site for testing and training purposes.

Agency News (5)

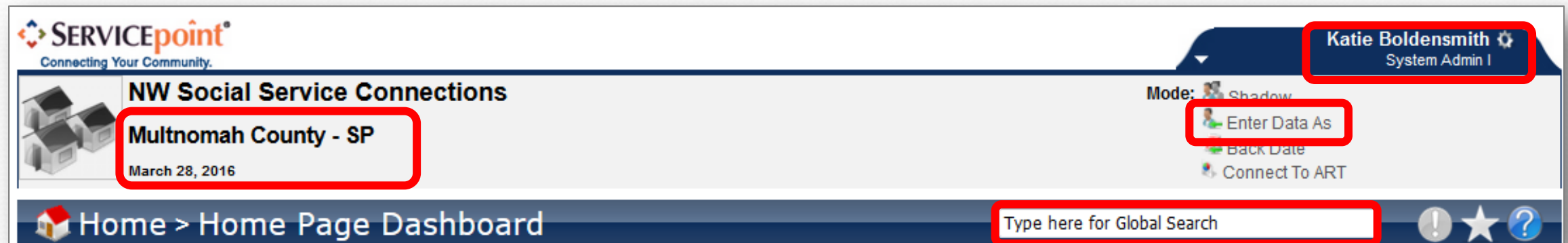
Add System News View All

Customize Home Page Dashboard

Legal Notices

The next few slides discuss general features of all
ServicePoint screens....

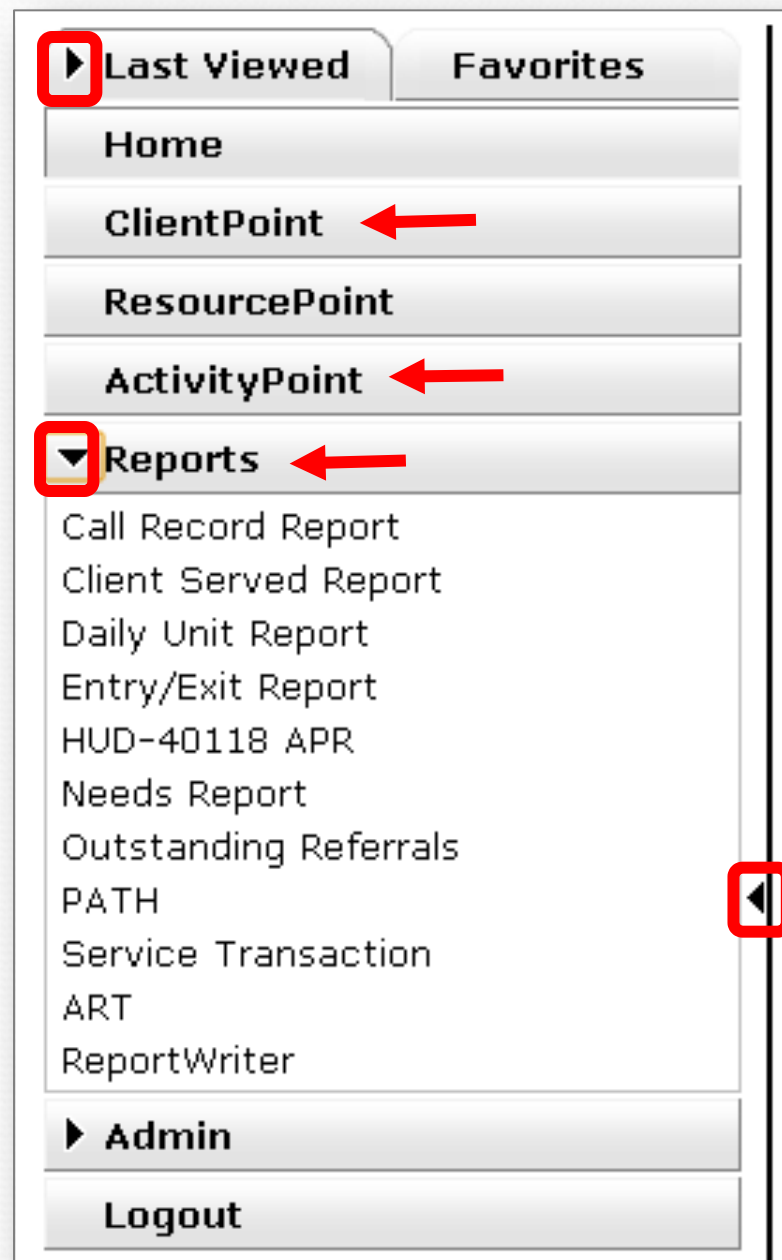
Top Banner



- Your **Default Provider** and **Today's Date** are on the left side of the screen. "Providers" in ServicePoint are a combination of your agency and project name.
- Your name and access level are in the upper right corner
- **Enter Data As** is under your name next to **Mode**.
(This is important if you enter data for multiple programs.).
- **Global Search:** Type in a name to search in various modules of ServicePoint (e.g. ClientPoint or ActivityPoint)

Module Navigation

“**Modules**” are the primary components of ServicePoint, and are located in a menu on the left side of the screen.



- **ClientPoint** is where all client data is entered (except bed nights.)
- **ActivityPoint** is where activity and attendance data is collected.
- **Reports** is where all data reports are located.
- Arrows (◀) indicate areas that can be collapsed or expanded.

Client Navigation

Last Viewed – [Hyperlinks](#) allow you to quickly select the last **10** client records accessed in the current session.

- Clients display with Last Name, First Name, and Client ID
- [Less](#) and [More](#) allow you to collapse to the most recent 5 clients, or expand to see the whole list



System and Agency News

The screenshot displays two overlapping windows from a news management system. The background window, titled 'System News (3)', shows a table with three news items. The foreground window, titled 'Agency News (5)', is highlighted with a red border and contains a table with five news items. The last item in the 'Agency News' table is highlighted with a red box.

Date	Headline
10/06/2011	NWSSC Documents
01/01/2011	NWSSC HMIS Contact information
01/11/2005	Please use the Training Site for testing and t

Add System News

Date	Headline
03/25/2016	SUN Community Schools Data Entry Made Easier!
02/09/2016	ServicePoint Customer Satisfaction Survey Results are In
09/08/2015	END VETERAN HOMELESSNESS Final Push and your help is needed
01/13/2010	Multnomah County-SUN Service System & Community Services
12/22/2006	ServicePoint Homepage, Multnomah County ServicePoint Helpline & Data Entry Guides

Add Agency News View All

- System and Agency News overlap. Click the **Agency News** tab for alerts most relevant to the SUN Service System.
- Click a news item [hyperlink](#) to open and view it.
- The **ServicePoint Helpline** contact info and links to user **training materials** can be found here.

Navigating **ClientPoint**

Searching for Clients

ClientPoint > Client Search

Client Search

Note: Please Search the System before adding a New Client.

Name:

Alias:

Social Security Number: - -

Social Security Number Data:

Exact Match: ☐

Search Clear Add New Client With This Information Add Anonymous Client















Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

- For existing clients, we strongly recommend searching by **Client ID** to avoid accidental duplication.
- Searches by name are based on how they sound, not just how they're spelled (unless you check **Exact Match**.)
- You'll get the best results by searching for the most unique part of a client's name (**First** or **Last**).

Client Search Results

Client Results									
		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		109	client, brother						1 
		107	client, child						1 
		108	client, mom						1 
		310	Client, Sample						0 
		122	client, test a	111-11-1112	05/18/1959		Male		1 
Showing 1-5 of 5									

- Click the pencil icon on the left to view a client's record.
- Check the **Client ID**, **Date of Birth**, and **Gender** to be sure you're selecting the correct client!

What the Icons Mean



Edit or View



Client created by current provider

Adding a New Client

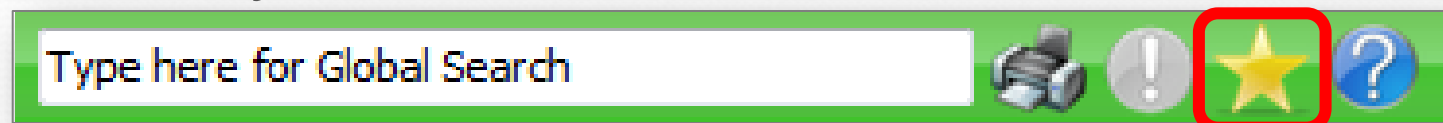
The screenshot shows the 'ClientPoint > Client Search' interface. On the left is a sidebar with navigation links: 'Last Viewed', 'Favorites', 'Home', 'ClientPoint', 'ResourcePoint', 'ActivityPoint', 'Reports' (with a dropdown arrow), 'Admin', and 'Logout'. The 'Reports' dropdown is expanded, showing options like 'Call Record Report', 'Client Served Report', 'Daily Unit Report', 'Entry/Exit Report', 'HUD-40118 APR', 'Needs Report', 'Outstanding Referrals', 'PATH', 'Service Transaction', 'ART', and 'ReportWriter'. The main content area is titled 'Client Search' and includes a message: 'Please Search the System before adding a New Client.' Below this are input fields for 'Name' (split into First, Middle, Last, and Suffix), 'Alias', 'Social Security Number' (with a dropdown for 'Social Security Number Data Quality'), and an 'Exact Match' checkbox. At the bottom of the search section are four buttons: 'Search', 'Clear', 'Add New Client With This Information' (highlighted with a red rectangle), and 'Add Anonymous Client'. Below the search section is a 'Client Number' section with a text input for 'Client ID #' and a 'Submit' button. At the bottom is a 'Client Results' section with a table header: 'ID', 'Name', 'Social Security Number', 'Date of Birth', 'Alias', 'Gender', and 'Banned'. The table body shows 'No matches.'

If the client you're looking for doesn't appear in the search results, just complete the full **First** and **Last Name**, and click **Add Client With This Information**.

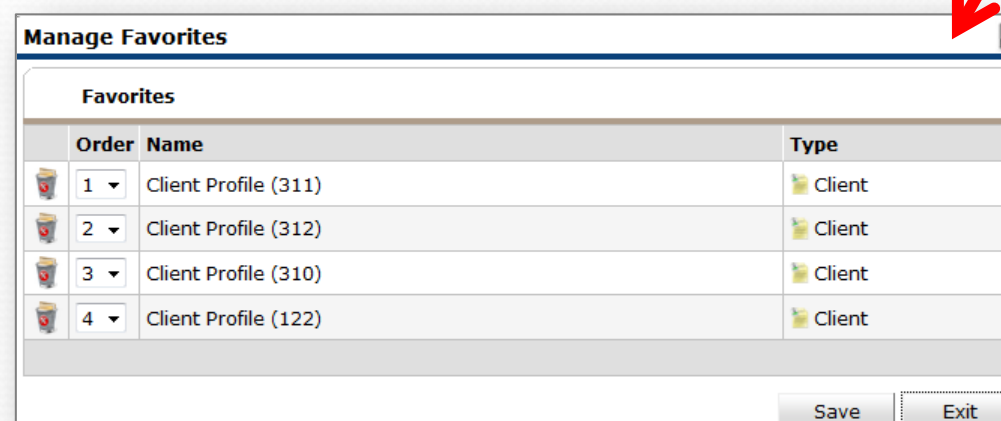
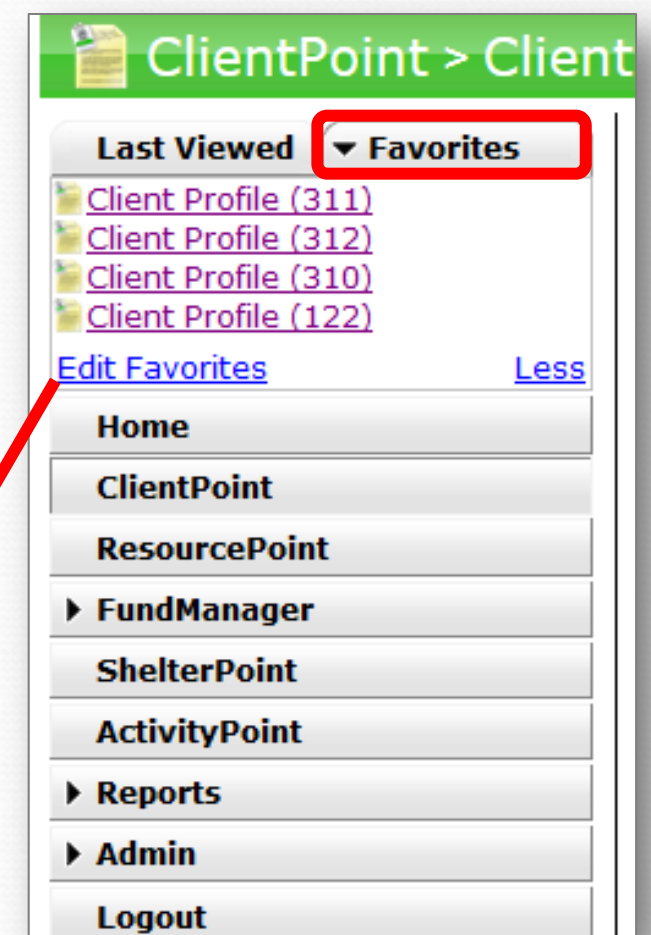
Favorites List

Users can create up to **10** client hyperlinks by adding them to their **Favorites List**

- Inside of a client's record, click the yellow star in the top right corner to add to your **Favorites** list



- To view your Favorites List, click the Favorites tab in the main menu and hover over a Client ID to see their name
- [Edit Favorites](#) link allows users to change the order or delete **Favorites** from the list



Client Records

Two main tabs allow you to view, enter, and edit all client data:

- **Assessments** tab: contains all *required* and *optional* client data points (demographics, parental release, teacher/grade, contact info, transportation, etc.)
- **Activities** tab: allows you to enroll clients in activities and see all *current* and *past* activities

Less Frequently Used Tabs:

- **Households** tab: allows you to link household members (only required for EKT)
- **Client Profile** tab: only used for editing a client's name
- **Entry/Exit** tab: displays enrollment in other projects (if user visibility settings allow)

Navigating **ActivityPoint**

Activity Search

The screenshot shows the 'ActivityPoint > Search' interface. On the left is a sidebar with navigation links: Last Viewed, Favorites, Home, ClientPoint, ResourcePoint, FundManager, ShelterPoint, ActivityPoint (selected), Reports, Admin, and Logout. The main content area has tabs for 'Activities' and 'Volunteers'. Under the 'Activities' tab, there's a section titled 'Activity Search' with a sub-header 'Search for Activities by using keywords for the Name.' Below this are several input fields: 'Search' (a text box), 'Provider' (a dropdown menu with the text 'Please choose a provider.'), 'Include Past Activities' (a checkbox), 'Start Date' (a date picker), and 'End Date' (a date picker). To the right of the 'Provider' dropdown are buttons for 'Search', 'My Provider' (highlighted with a red box), and 'Clear'. At the bottom of the search section are buttons for 'Search', 'Clear', and 'Add New Activity'. Red boxes are drawn around the 'Search' text box, the 'Include Past Activities' checkbox, the 'Start Date' and 'End Date' date pickers, and the 'My Provider' button.

Searching for an activity by **keywords** may give you too many/few results. Improve your search by adding the following prompts:

- Check **Include Past Activities** to find activities that have ended already
- Add a **Start and End Dates** to filter down to activities in a certain timeframe
- If you have access to multiple 'Providers' (schools), remember to '*Enter Data As*' and click **My Provider** to find a list of activities at *that* school

Activity Info Sessions Enrollment Attendance Volunteers

Activity ID: 58593
 Provider: Multnomah County - SP (2206)
 Name*: Summer Reading Club
 Activity Type*: ☒ Local ☐ Public
 Ages*: 10 - 18
 Time Offered*: Summer
 Frequency*: More than twice a week
 Recurring Weekly Schedule: ☐ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday
 Start Date*: 07 / 05 / 2016
 End Date*: 08 / 26 / 2016
 Start Time*: 10 : 00 AM
 End Time*: 12 : 00 PM
 Teacher: Mr. Books
 Location: Library
 Enrollment Type: Open
 Max Enrollment*: 30
 Enrollment Status: 30 Slots Remaining
 Category*: SUN-Academic Improvement/Remediation

Subject

-Select- Add Subject

Subject Name

SUN-Reading/Literacy

Showing 1-1 of 1

Target Participant Groups

-Select- Add Target Participant Group

Target Participant Group

SUN-Community/Neighborhood Residents

SUN-Families

SUN-Students/Youth

Showing 1-3 of 3

Partners (Activity Sponsors)

-Select- Add Partner

Partner/Activity Sponsor

Multnomah County Library Books-2-You

Showing 1-1 of 1

Copy Activity Save Save & Exit Exit

Activity Information

Four main tabs contain all activity data:

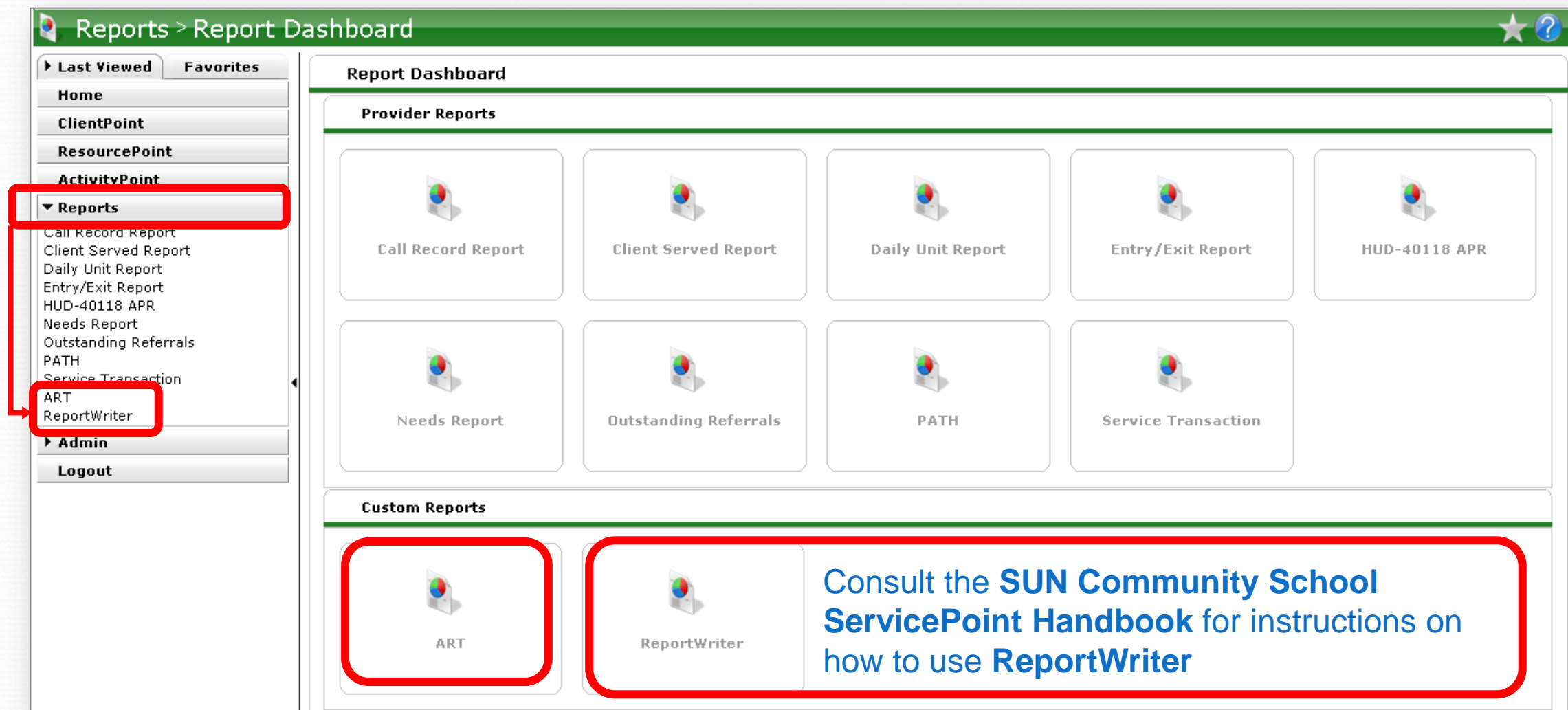
- **Activity Info:** all key activity details (name, dates, times, subjects, target participant groups, etc.),
- **Sessions:** a list of each particular *date* that an activity takes place on
- **Enrollment:** a list of all clients enrolled in the activity
- **Attendance:** tracks attendance of each client (from Enrollment tab) for every day (from Sessions tab)
- The **Volunteers** tab has the ability to track all volunteers at your site and their involvement in particular activities. However, there are currently NO REPORTS available for this data.



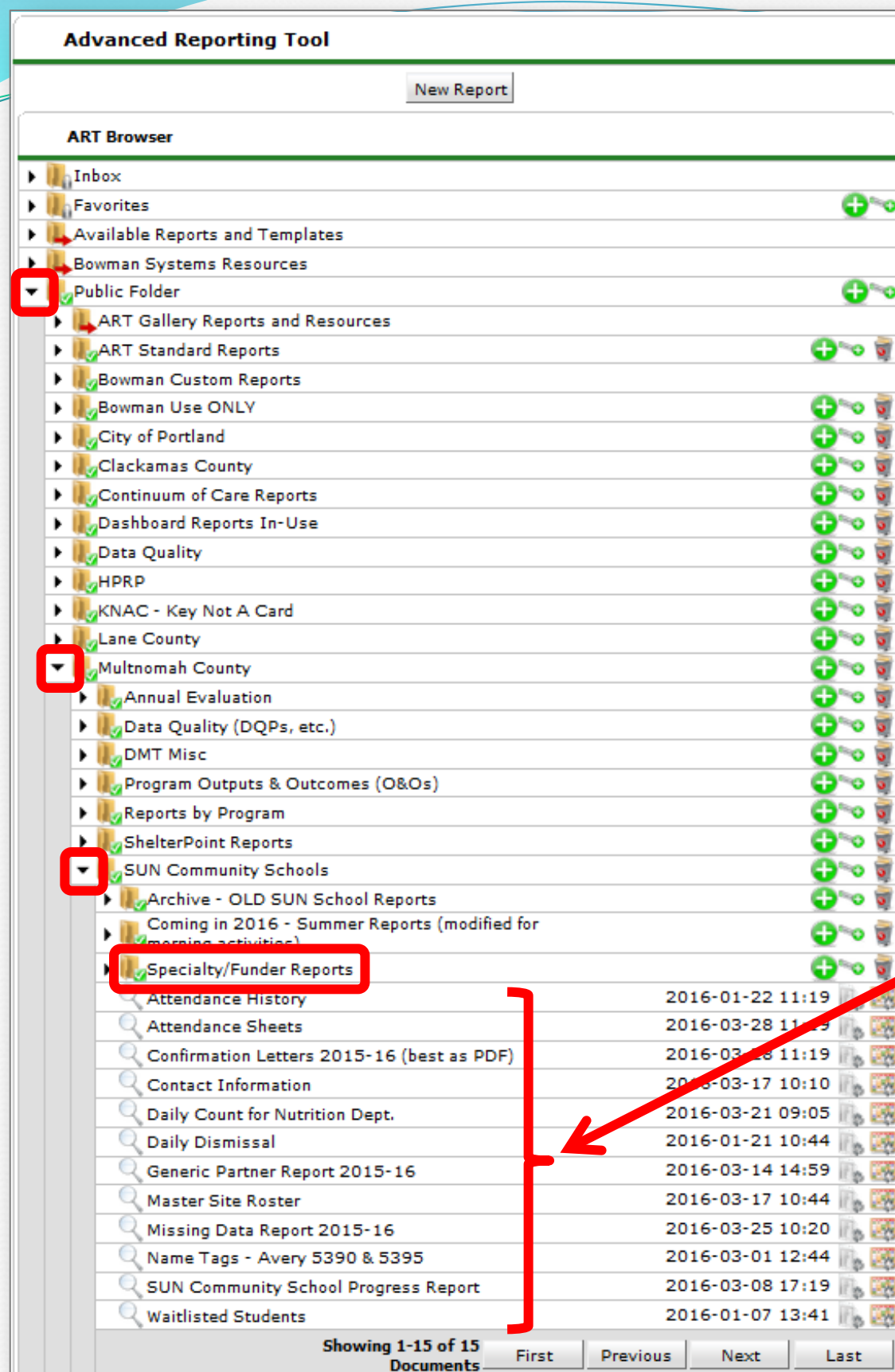
Navigating ART

(Advanced Reporting Tool)

Reports Dashboard



ART and ReportWriter reports can be located either in the Reports menu on the left of the screen, or by clicking the icons at the bottom of the Report Dashboard



SUN School ART Reports

All ART reports for SUN Schools can be found by following this folder path:

Public Folder >

Multnomah County >

SUN Community Schools

The core set of SUN School reports are located here

The **Specialty/ Funder Reports** subfolder contains specialized reports for particular funders, custom agency reports, etc.

System Refresh

NOTE: ART is NOT a live reporting tool. The data entered in ServicePoint syncs up with ART **twice daily** when the system refreshes (typically around 3:00am and 3:00pm).

The time of the last system refresh is displayed at the bottom of the ART screen:

Reports > ART

Type here for Global Search

Advanced Reporting Tool

New Report

ART Browser

- Inbox
- Available Reports and Templates
- Bowman Systems Resources
- Public Folder

Showing 1-5 of 5 Documents

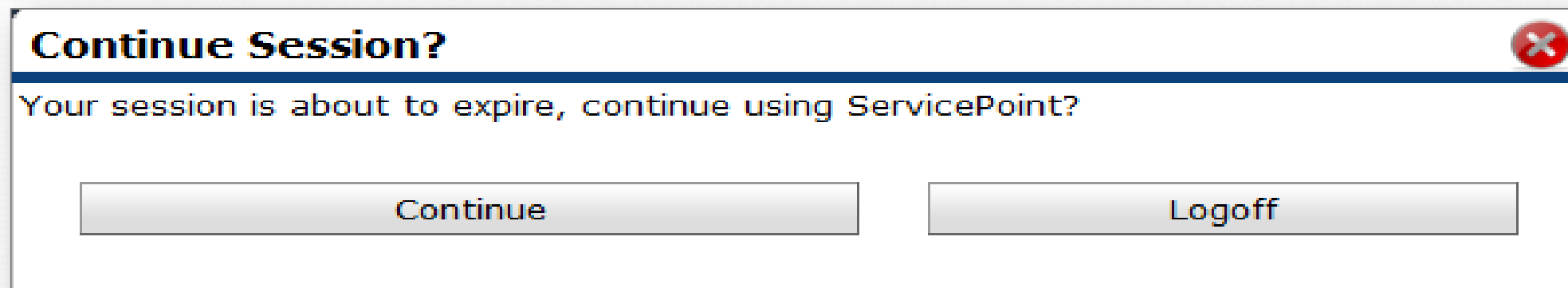
Scheduled Reports

Name	Interval	Start Date	End Date	Type	Status
					Refresh
Last Warehouse Build: March 29, 2016 03:25:15 AM					

Legal Notices

Timing Out

A message warns you before timing out and allows you to continue your current session



- Click **Continue** to add another 30 minutes to your session
- Click **Logoff** to return to the login screen