

ServicePoint Upgrade

November 2013

ServicePoint 5.8 is here! On the evening of October 31st, ServicePoint received a very minor make-over. When you log into ServicePoint on November 1st, you'll notice just one or two small changes.

The biggest change will be for users who enter Service Transactions:

To enter a service transaction, you will still click the 'Add Service' button in your client's ServicePoint record, as you have in the past. A window will open up, and it is very similar to the screen that you are familiar with.

At the top, everyone in the client's household will be listed (just as before.) Next to the client whose record you are in, it will say '(Primary Client)' and this is a new feature. Remember to click the name of other household members if applicable. ***Training Tip:** click the check box next to the household type and every household member's name will be checked.

Another new feature will be that the ServicePoint user who is creating the service transaction is also listed.

Enter your Start Date as you typically would. Multnomah County Users who enter service data cumulative for the month will use the last day of the month as the Start Date; Users who enter each service individually will enter the date the service occurred as the Start Date. End Date is blank.

Select the Provider Specific Service from the pull-down menu as you normally would. ***Training Tip:** if you select a Provider Specific Service, the Service Type will automatically fill in Basic Type for you!

This is the end of the window. Many users are probably asking, what about my service hours?!? There's more. . .Click 'Save & Continue' to view the rest of the service transaction window. There you'll be able to select service staff and enter amounts. After entering the amount provided, just scroll to the bottom and Save & Exit!

Please note, if you are using 'Funding Source' for any programs, there have been changes to the way that is entered. Multnomah County does not currently use Funding Source. Contact your administrator for any necessary training and instruction. Feel free to contact the helpline if you need assistance determining who to contact.

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The second change you may have noticed is in your Last Viewed and/or Favorites tabs: Prior to the upgrade, when you hovered over a client listed in the Last Viewed tab, nothing would happen. When you hovered over a client listed in the Favorites tab, you would see just their name and Client ID.

In the upgraded version of ServicePoint, when you hover over a name, you'll see more detailed information on the client.

The screenshot shows the ServicePoint web application interface. At the top, there are two tabs: 'Last Viewed' and 'Favorites'. The 'Last Viewed' tab is active, showing a list of clients. The first client is '(18) Knope, Leslie'. A red arrow points from this client's name to a detailed tooltip that appears on hover. The tooltip contains the following information:

- Client - (18) Knope, Leslie**
- Client Record**

Name	Knope, Leslie
Alias	
Social Security	
SSN Data Quality	Refused (HUD)
Age	
- Client Demographics**

Date of Birth	
Gender	Female
Primary Race	
Secondary Race	

At the top right of the interface, there is a 'System News (5)' section with a 'Date' and 'Headline' column. Below it, there is a 'Last Viewed' and 'Favorites' section. The 'Last Viewed' tab is active, showing a list of clients. The first client is '(18) Knope, Leslie'. A red arrow points from this client's name to a detailed tooltip that appears on hover. The tooltip contains the following information:

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Name	Knope, Leslie
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SSN Data Quality	Refused (HUD)
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- Client Demographics**

Date of Birth	
Gender	Female
Primary Race	
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Questions? Comments? Concerns?

Contact the Multnomah County ServicePoint Helpline: (503) 970-4408 or servicepoint@multco.us