ADDING ROI'S AND UPLOADING CLIENT DOCUMENTS IN SERVICEPOINT

ServicePoint can be used to upload and store client documents needed for rental applications

- Examples – Copies of IDs, support letters, birth certificates, income/benefit verification, etc.
- Correct entry of ROIs is critical – this allows other users to find and use the documents

ADDING ROI'S TO SERVICEPOINT

- Agencies that provide services are set up as 'Parents' in ServicePoint; Specific programs at each agency are called 'Children'.
- The 'Parent' provider is usually just the name of the agency; the 'Child' providers will have the agency name + the specific program name.
- ROIs must be recorded for the Parent + any Children that a client enrolls in. (see ROI data entry steps in ServicePoint Program Handbook)

Path Home: EHV PH and Retention (SHS)
Path Home: Family System Housing Navigator
Path Home: Family Village Shelter ES
Path Home: Fun Adventures
Path Home: MHT-Housing Choice Voucher (HCV)
Path Home: MHT (Mobile Housing Team) Rapid Re-Housing
Path Home Parent
Path Home: Shelter Diversion (Homelessness Prevention)
Path Home: Shelter Diversion (Rapid Re-Housing)
Path Home: Winter Shelter Diversion-RRH
Path Home: Winter Shelter Outreach (SO)

ADDING DOCUMENTS TO SERVICEPOINT

Documents can be added in 2 places – Client Profile tab or Case Plans tab

- If you don't see the Case Plans tab when you are logged into ServicePoint, email servicepoint@multco.us to have this fixed.

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Both tabs have a File Attachments sub-assessment – click the Add New File Attachment button to search on your hard drive for the file you want to upload.

File Attachments

	Date Added ▼	Name	Description	Type	Provider	Added From	
Add New File Attachment			No matches.				