Multnomah County

Department of County Human Services

Youth & Family Services Division

ServicePoint New User Training

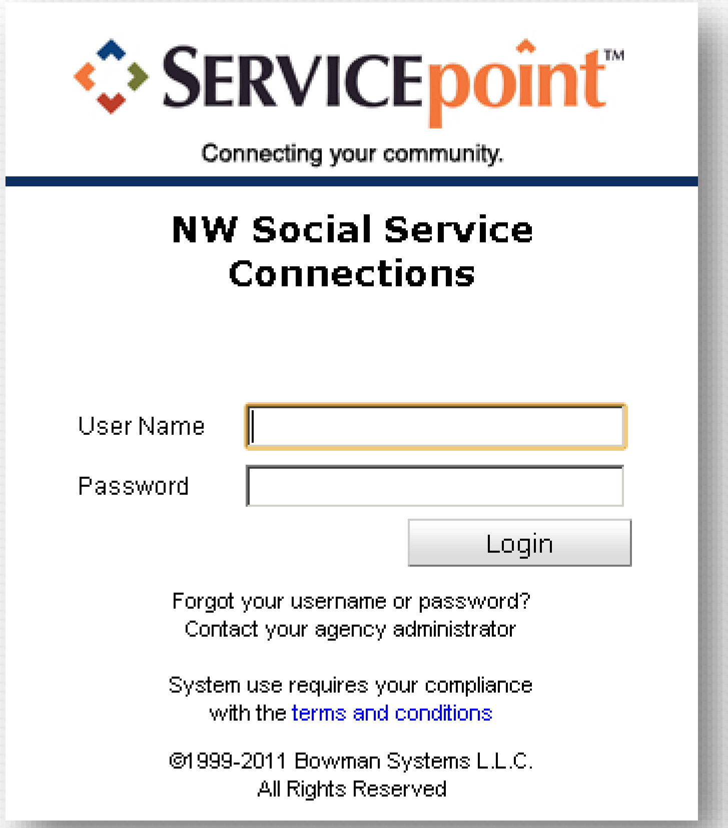


Table of Contents

What is ServicePoint?

ServicePoint is a web-based data collection tool that contains client demographic, service, and program outcome data for Multnomah County Youth and Family Services Division programs.

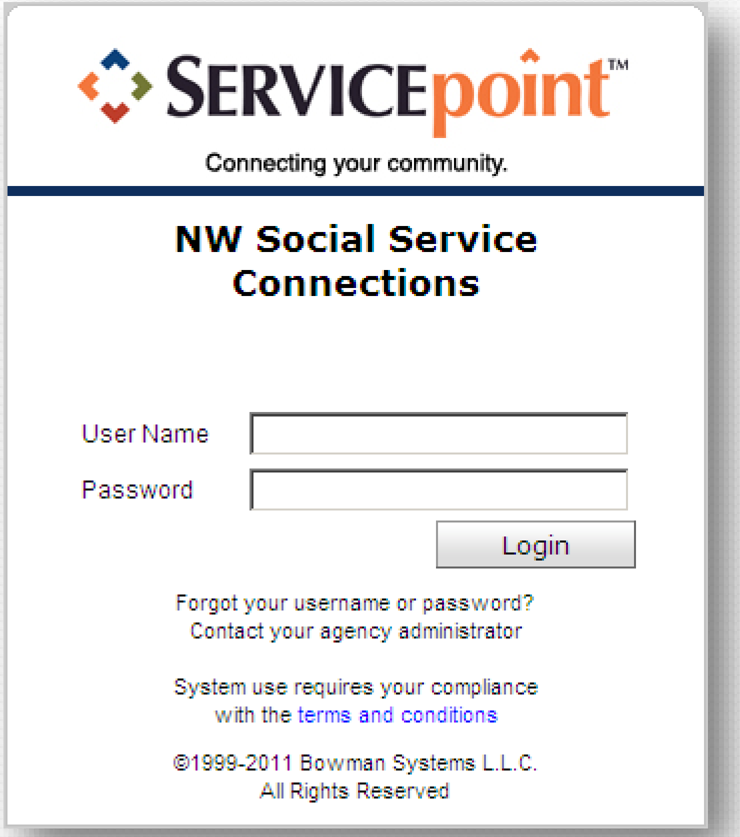
The **ServicePoint** web address is:

https://portland.servicept.com

All data must be entered into **ServicePoint** by the15th of the month after services are provided.

Logging On

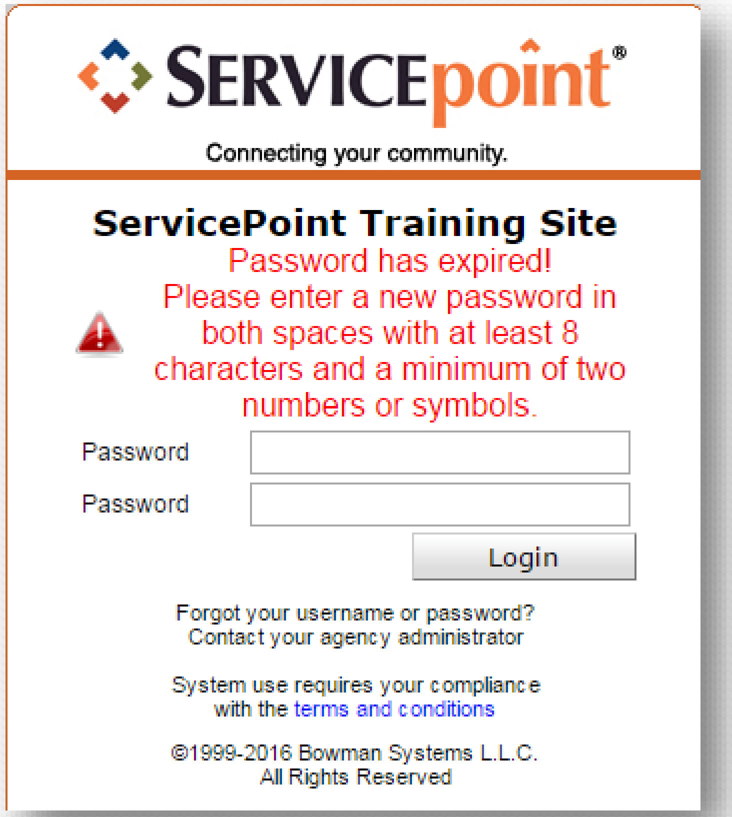
- Your User Name and a temporary password will be issued during this training, once you've signed a confidentiality and security agreement.
- **DO NOT SHARE your password with anyone.**
- Because **ServicePoint** contains sensitive client data, all data added, edited, and deleted can be tracked by your User Name.
- If you attempt to log in more than three times without success, your account will be inactivated.



Contact the **ServicePoint** helpline at 503-970-4408 to have your account reactivated.

Passwords

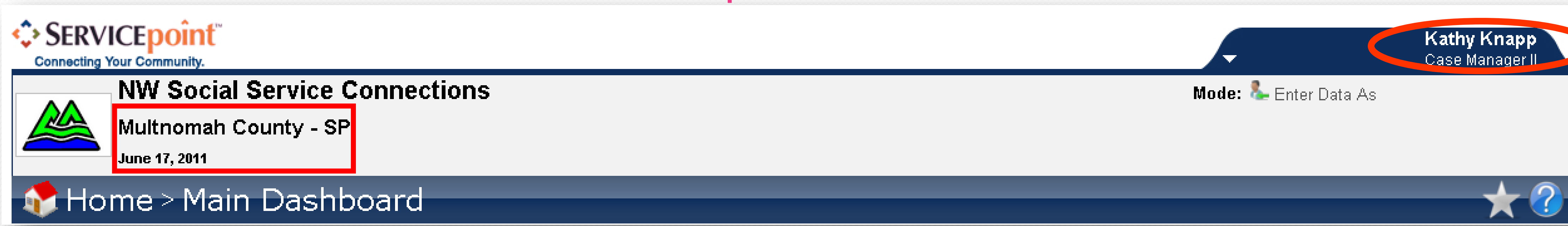
- You will have to change your password the first time you log in.
- Passwords must be at least 8 characters long, and include two numbers or symbols.
- Your password will expire every 45 days, and you will be asked to create a new one.
- If you are locked out at any time, the password you receive from the **ServicePoint** team will be temporary, and you will be asked to change it when you attempt to log in again.
- **DO NOT SHARE your password with anyone.**



Let's start looking

at **ServicePoint Dashboard**!

Top Banner



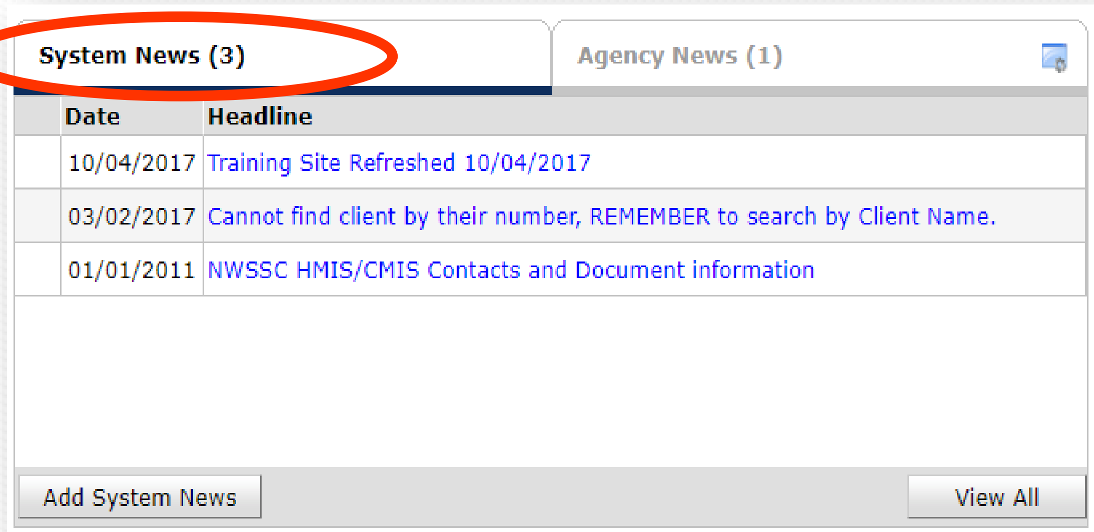
- Your **Default Service Provider** and **Today's Date** are on the left side of the screen.

  Providers in ServicePoint may be your Agency or a combination of Agency and Program (for example, Human Solutions vs. Human Solutions: HUD Family Futures.

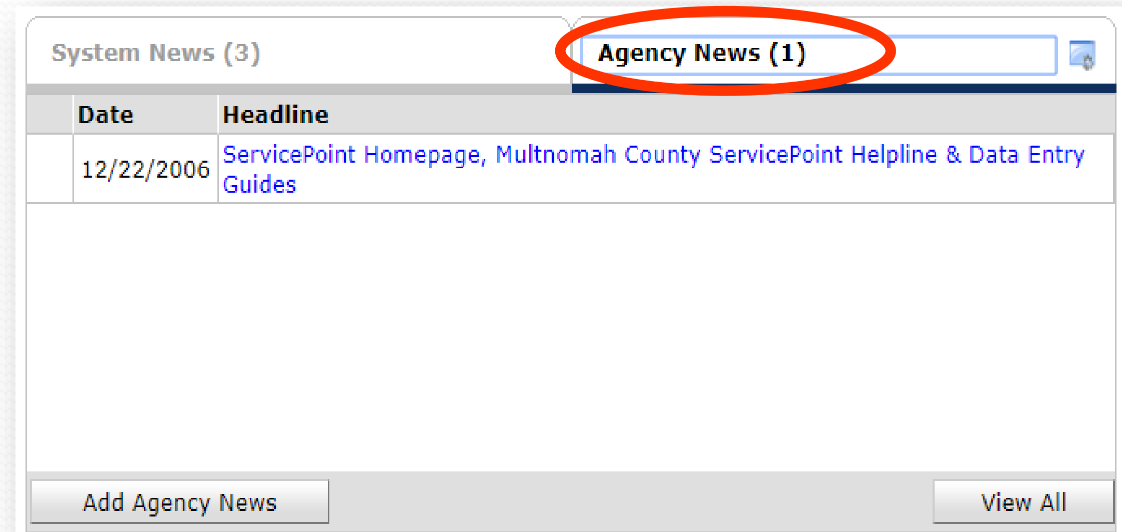
- Your name and access level are in the upper right corner

Home

System and Agency News



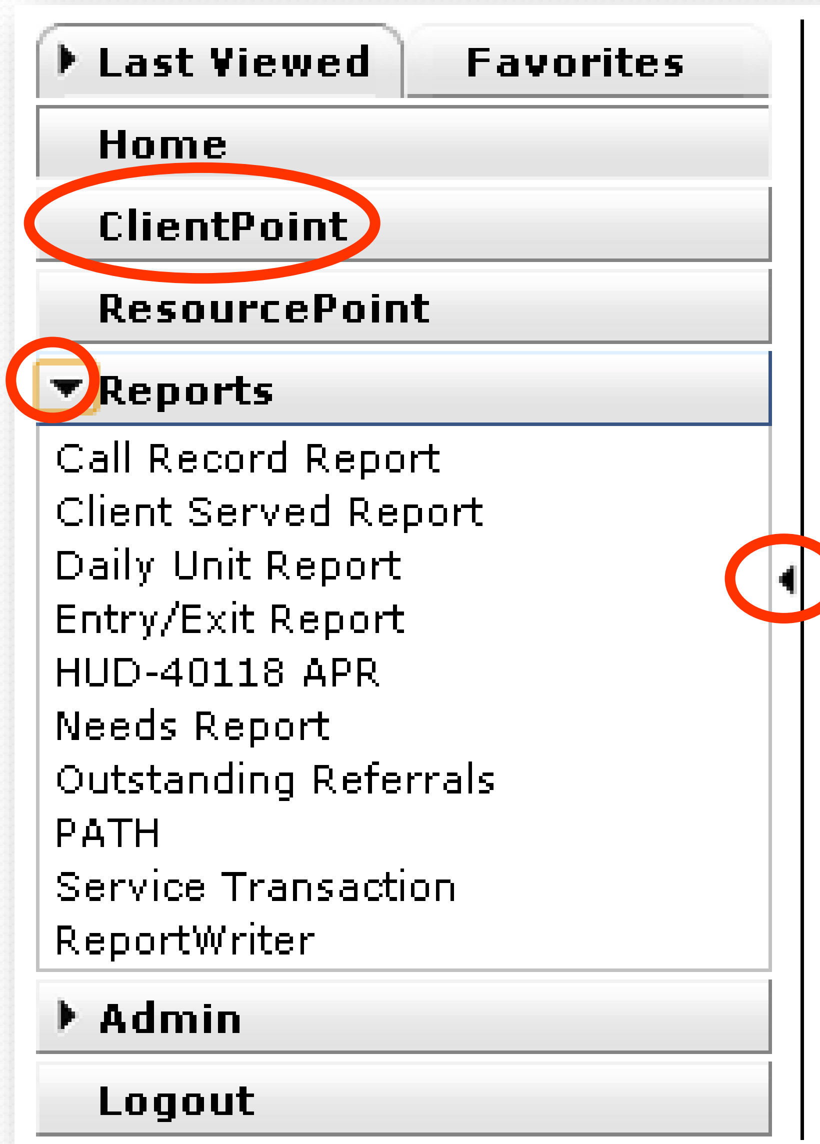
View 1: ServicePoint News



View 2: Agency News

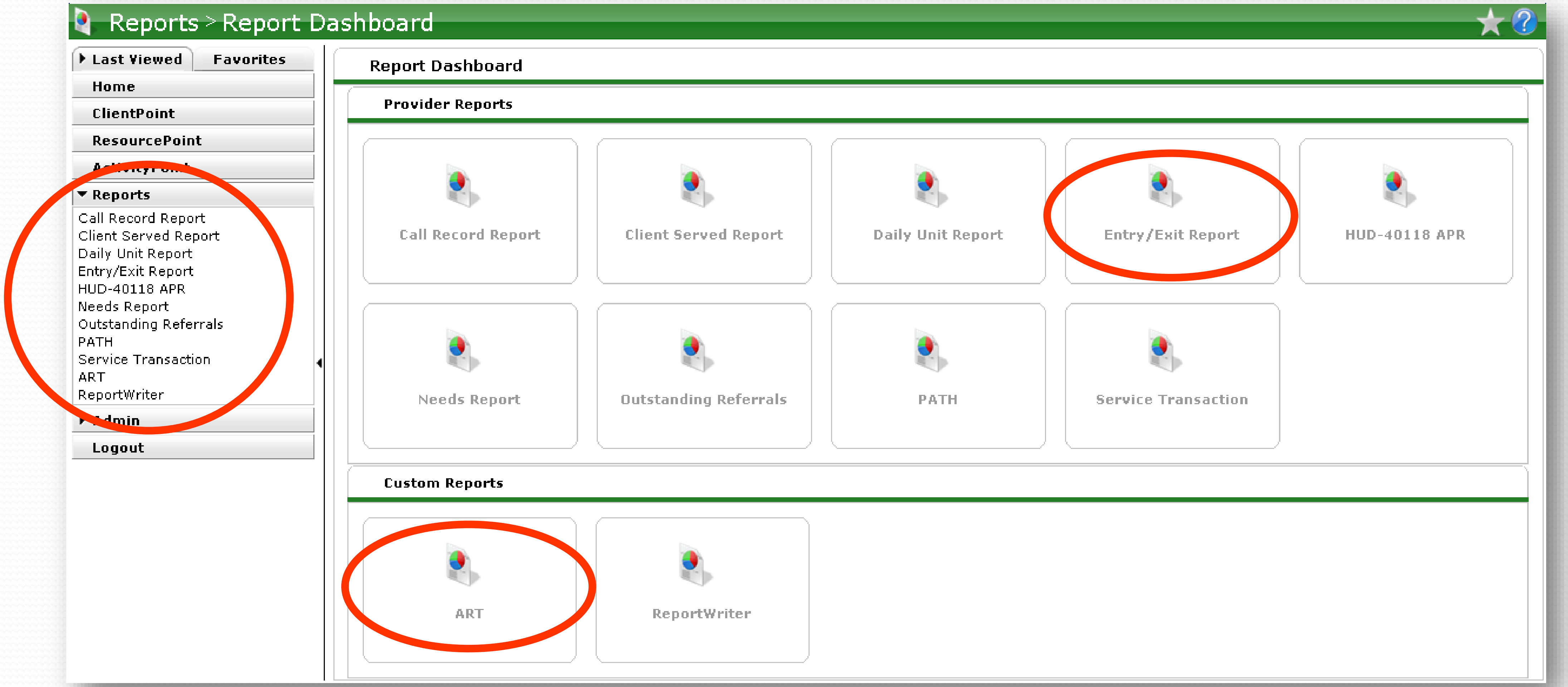
- **System News** are updates from the Portland Housing Bureau.
- **Agency News** are updates from Multnomah County. Click the appropriate tab to view the news items.
- News subjects display as hyperlinks. Click a news item to open and view it.

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.
- **Reports** is where all data reports are located.
- **Arrows** indicate areas of the menu that can be collapsed or expanded.

Reports Dashboard



Reports are located in a dashboard of buttons representing different canned reports, as well as the custom reporting tool, ART (which requires a separate license.)

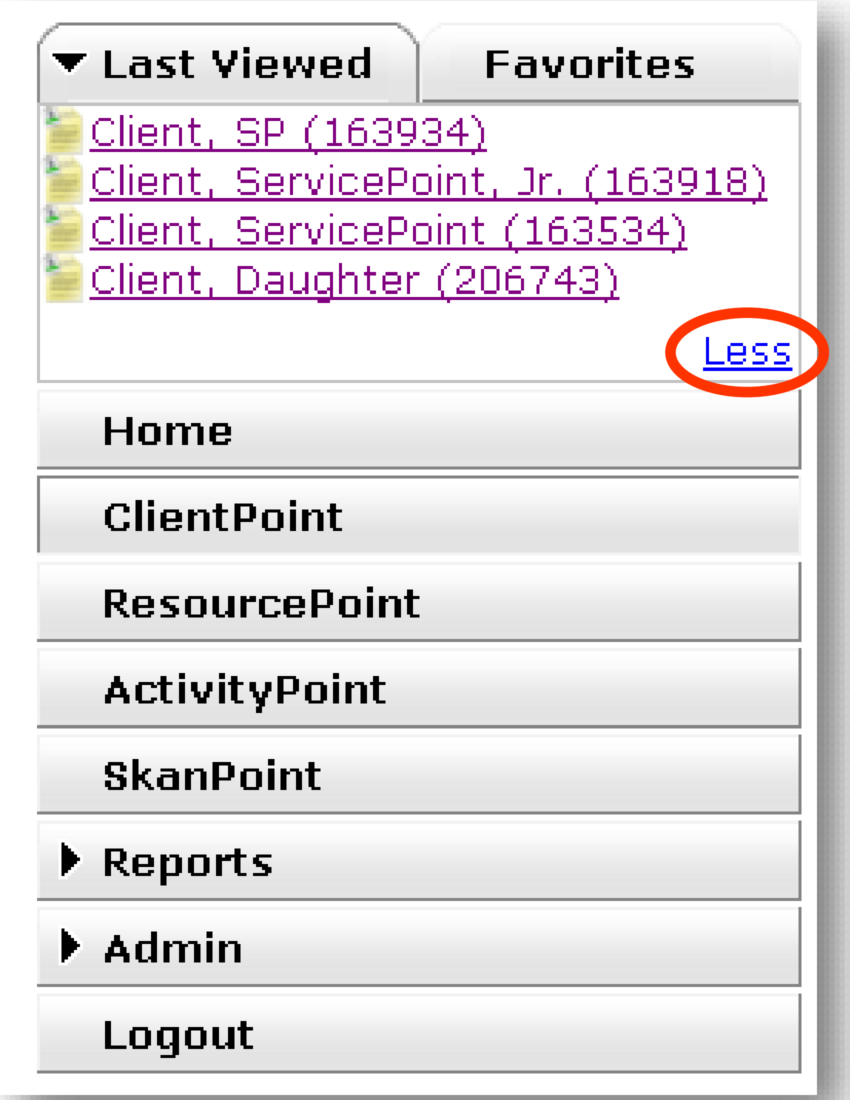
We strongly recommend at least running the Entry/Exit report regularly to track data that you've entered.

Reports can also be accessed in the module menu.

Client Navigation

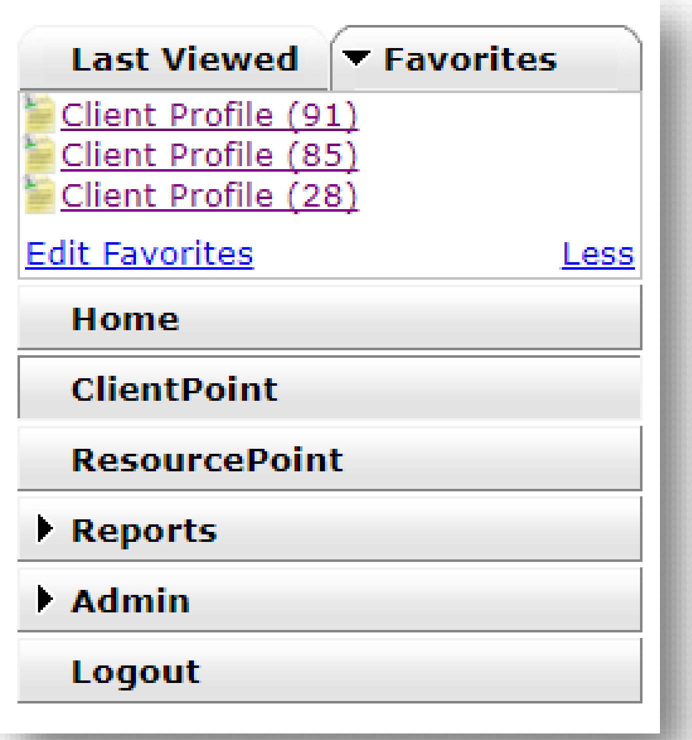
Last Viewed – Hyperlinks allow you to quickly select the last **10** client records accessed in the current session.

- Clients display with Last Name, First Name, and ClientID
- Less and More allow you to collapse to the most recent 5 clients, or expand to see the whole list



Client Navigation

Favorites – You can designate up to 10 clients as 'favorites' by clicking on the star icon while in their client profile.



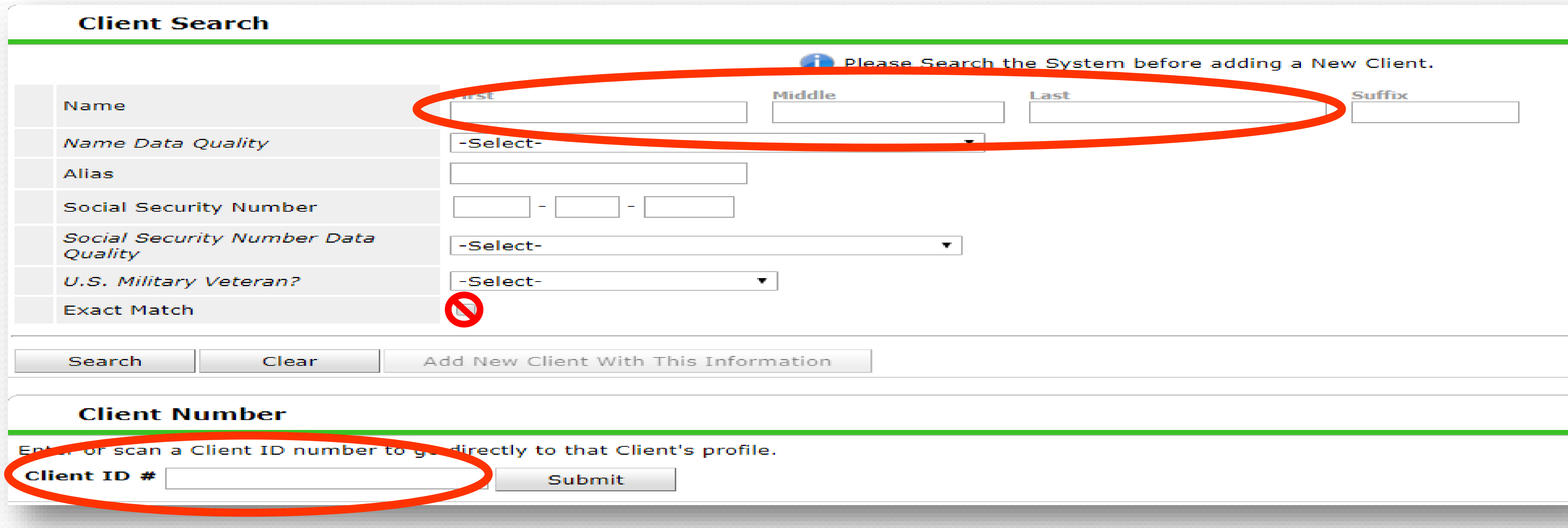
- Clients display with Client ID only

- Less and More allow you to collapse or expand to see the whole list

Let's look at how to search for and create clients in **ClientPoint**…

ClientPoint

Searching for Clients



- 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 (never use **Exact Match**.)
- You'll get the best results by searching for the most unique part of a client's name (**First** or **Last**).
- You can also search by **Alias**, which is an optional field for a client's nickname (or street name for some providers.)

Client Search Results

Client Results

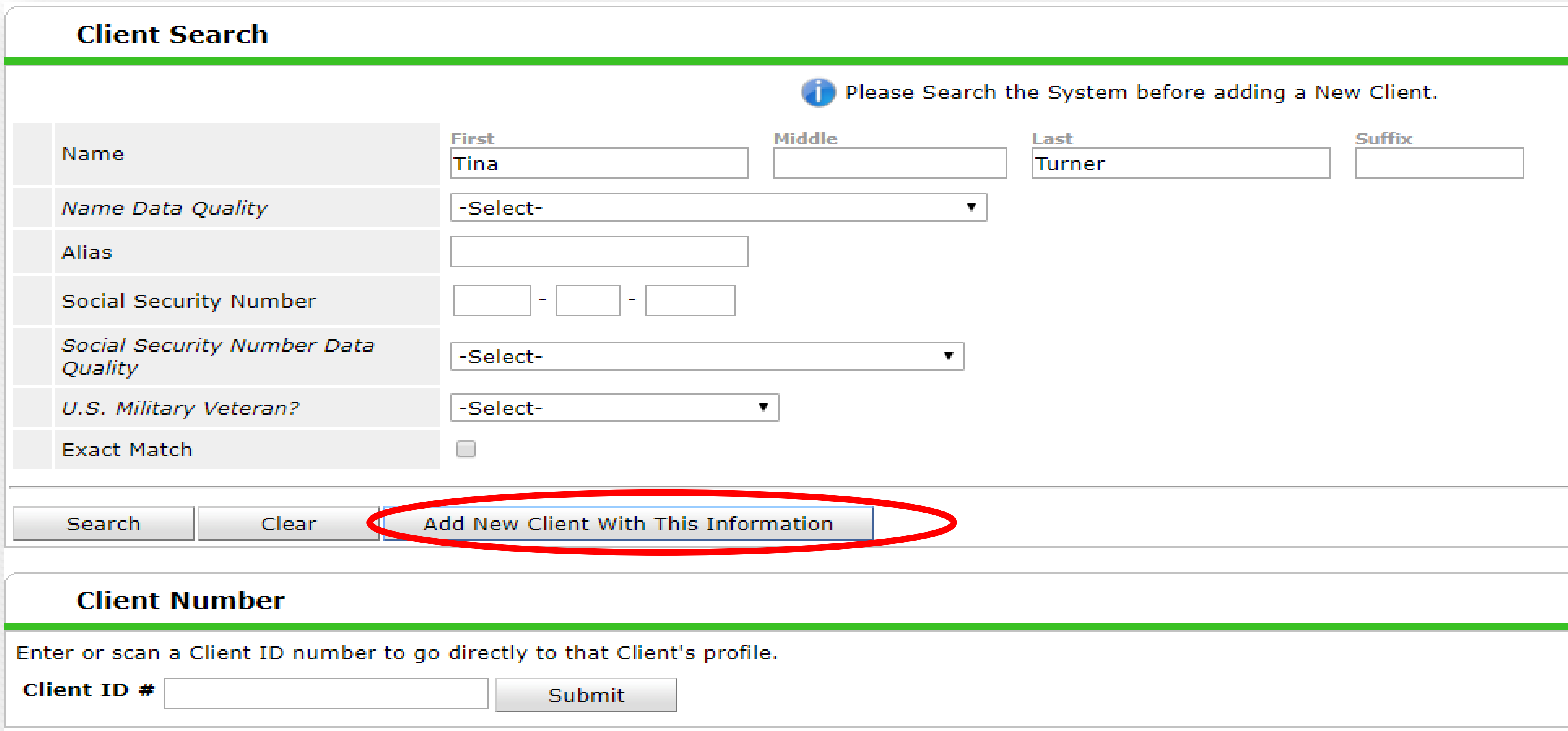
		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		584146	Client, Baby		01/01/2006				2
		359431	Client, Binnsmead						1
		501675	Client, Child 1						2
		501676	Client, Child 2						3
		206743	Client, Daughter		11/01/2014		Male		2
		271672	Client, Friendly		04/01/2015		Male		1
		501672	Client, Mother		06/02/1980		Female		3

- Click the pencil icon on the left or on the client's name to view that 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

ClientPoint

Adding A New Client Record



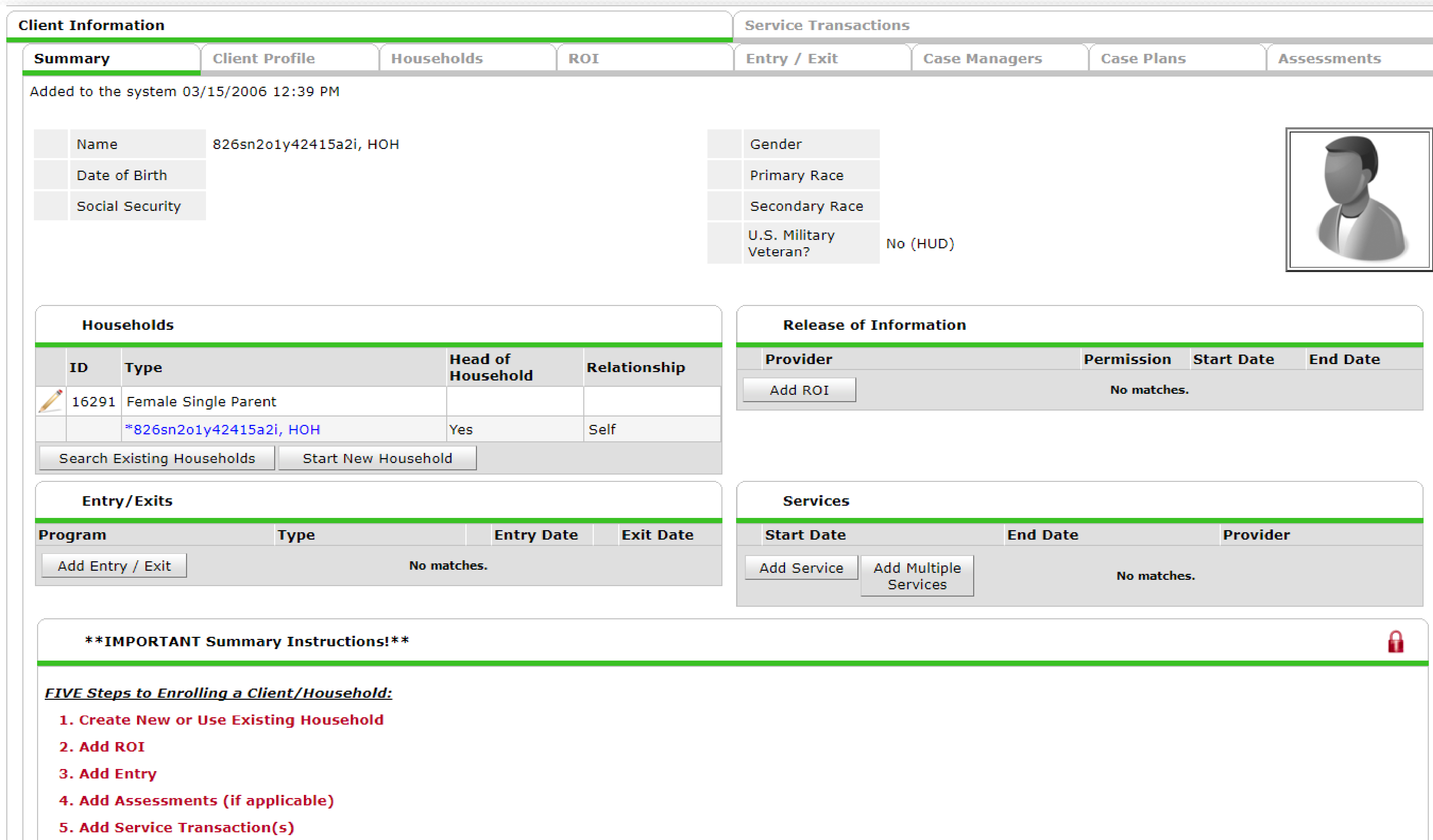
If the client you're looking for doesn't appear in the search results, complete the full **First** and **Last Name** (middle name or initial, too, if you have that information), and click **Add Client With This Information.**

Now that you’ve selected or created a client, you can start entering data…

ClientPoint

Welcome to the Client's Record

The tab you are on will be underlined in **GREEN**



This is the screen you see after creating a new or selecting an existing client. It contains the client's **Household, ROI, Entry/Exit,** and **Service** information…

Data Entry Order

It's VERY important to enter data in the correct order in ClientPoint!

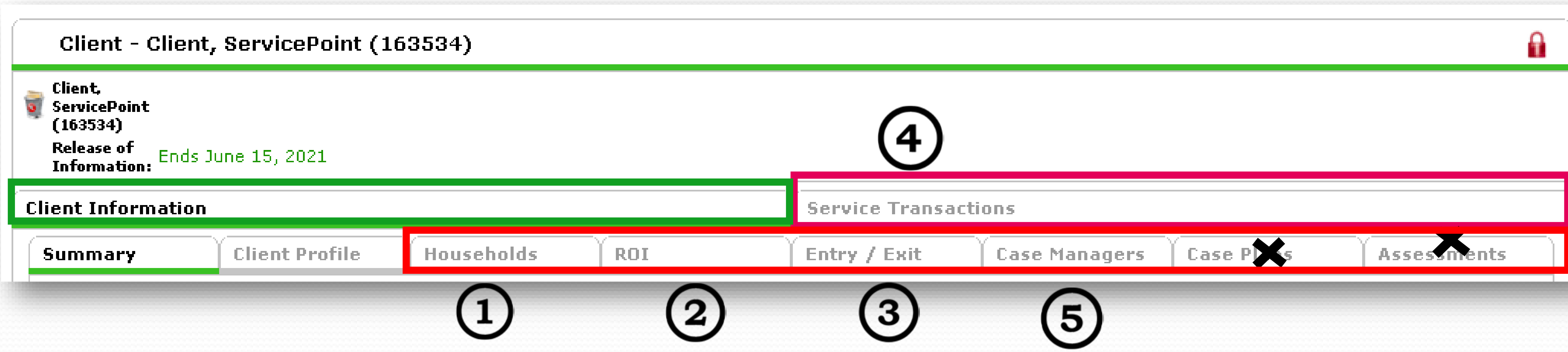
1. Households
2. Release of Information (ROI)
3. Entry/Exit
4. Service Transactions
5. *Optional – Case Manager*

If you enter data out of order, there will be problems viewing that data later.

ClientPoint

Tabs

Once you’re in a client’s record, you will find all essential data entry components under tabs called **Client Information** and **Service Transactions**.



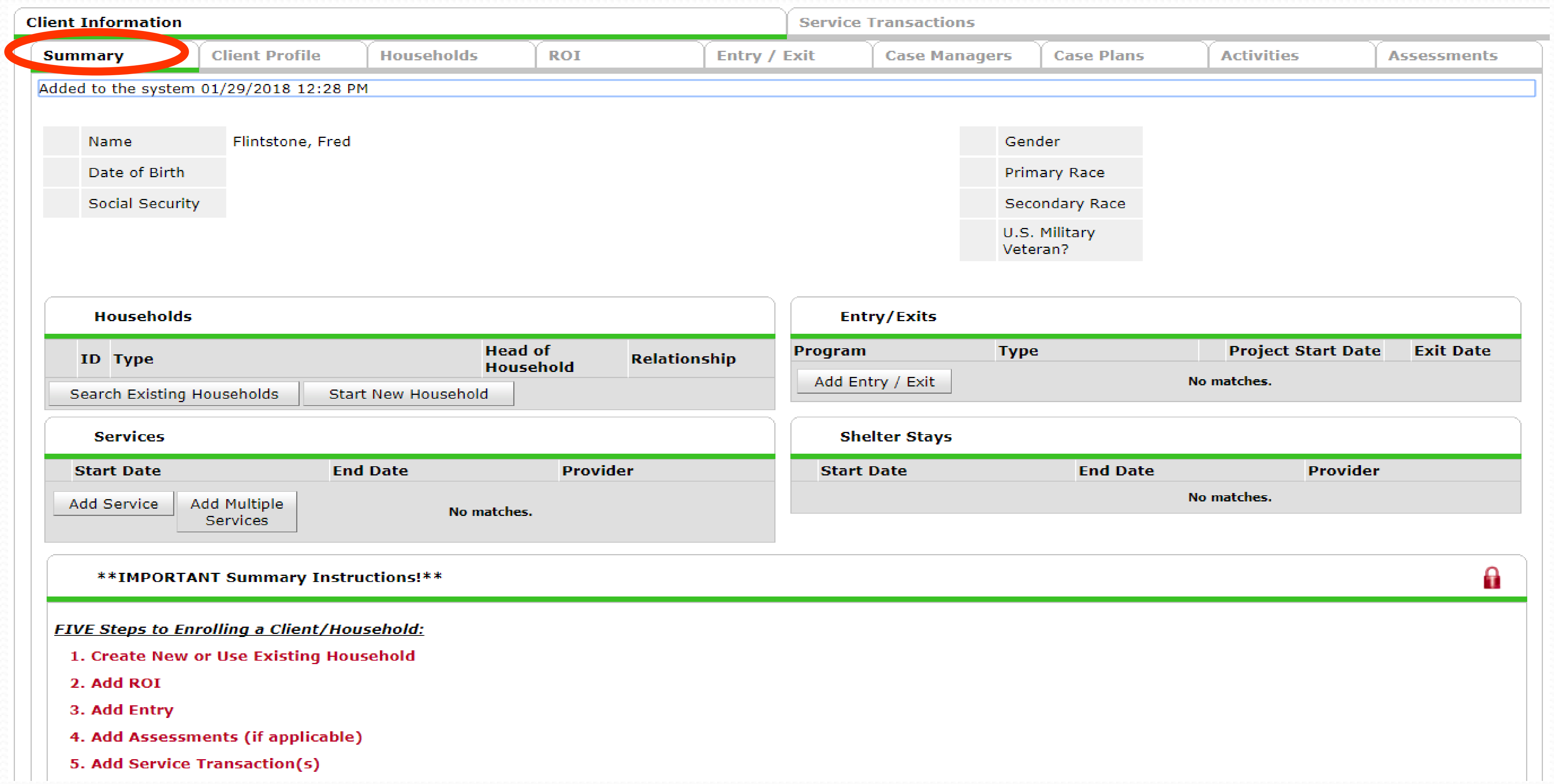
Below these two main tabs, you will find additional tabs for:

1. Households
2. Releases of Information (ROI’s)
3. Entry/Exit
4. Service Transactions (above the other tabs)
5. Case Managers

Now we'll look
at each tab under
Client Information…

ClientPoint

Summary Tab

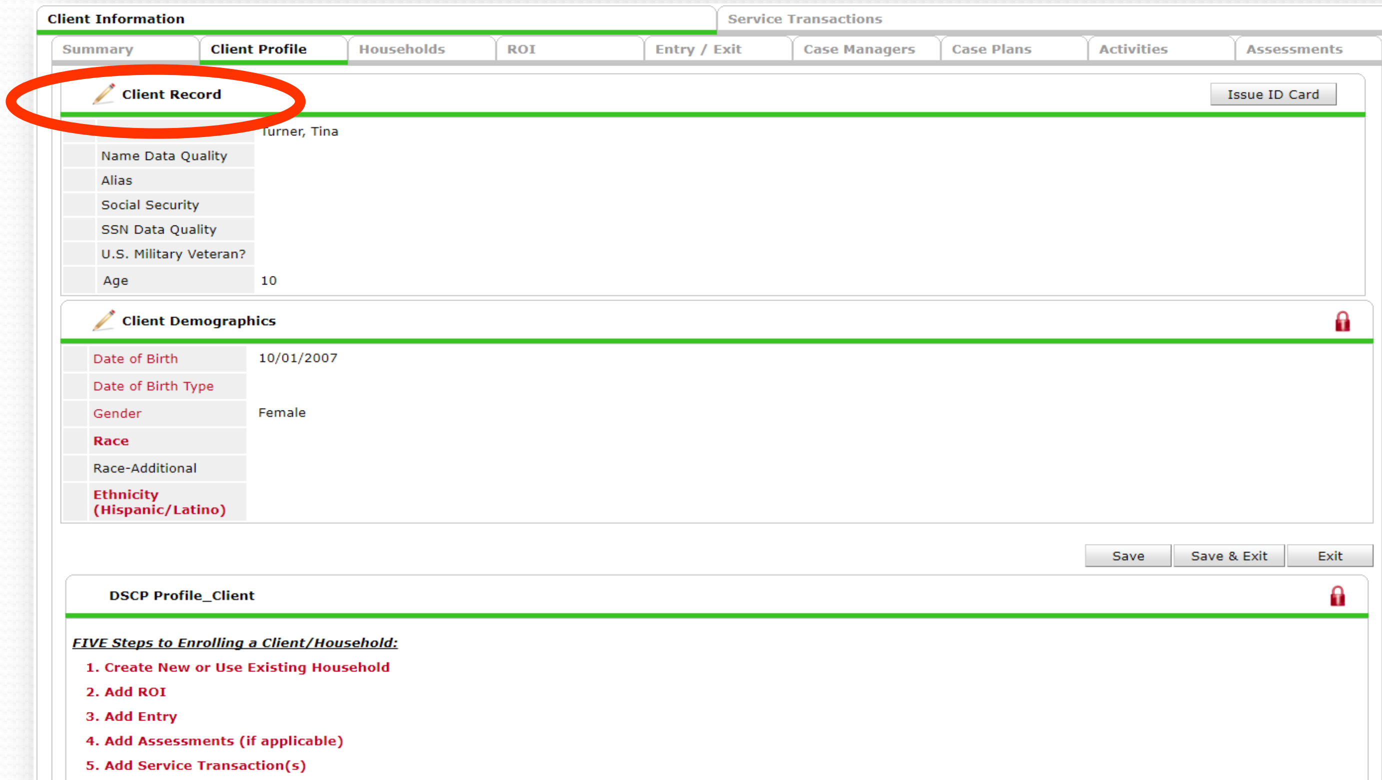


The **Summary** tab allows you to do almost everything you need to do with your client in one place.

The **Summary** tab contains a miniature-view of some of the information on the other tabs.

ClientPoint

Client Profile Tab



The **Client Profile** tab allows you to edit a client's name by clicking on the pencil icon next to **Client Record.**

DO NOT answer these demographic questions in the **Client Profile**! These same questions can be found in your program's **Entry.**
Once these questions are answered in the **Entry,** the information will appear here in **Client Demographics.** However, if you enter information directly into **Client Demographics,** it *will not* appear in the **Entry.**

What is **Step 1** when you're enrolling a new client/household?

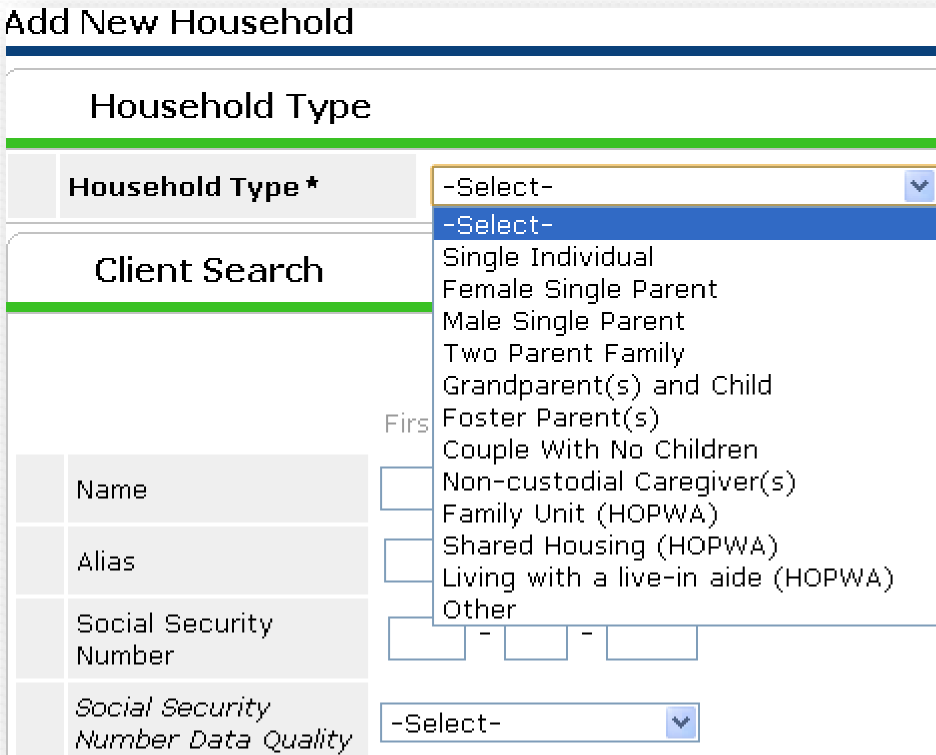
Household!

ClientPoint

Households Tab

- You must create a household for <u>all</u> clients, even if they live alone, or family member information cannot be obtained.
- Search for all family members before creating a new household. If one of your family members is already in **ServicePoint,** you can use their profile to build the rest of the household.
- Is the client new to your agency and/or **ServicePoint**? Click **Start New Household** to begin.*
- *All of this work can be done from the Summary tab, through the Household dashlet.

Start New Household



- **Household Type** should only be 'Single Individual' if your client lives alone.
- If you are unsure of the client's **Household Type,** you may select 'Other'.
- Do not select any options marked (HOPWA), unless your client is residing in a situation designated as a Housing Opportunity for Persons With AIDS.

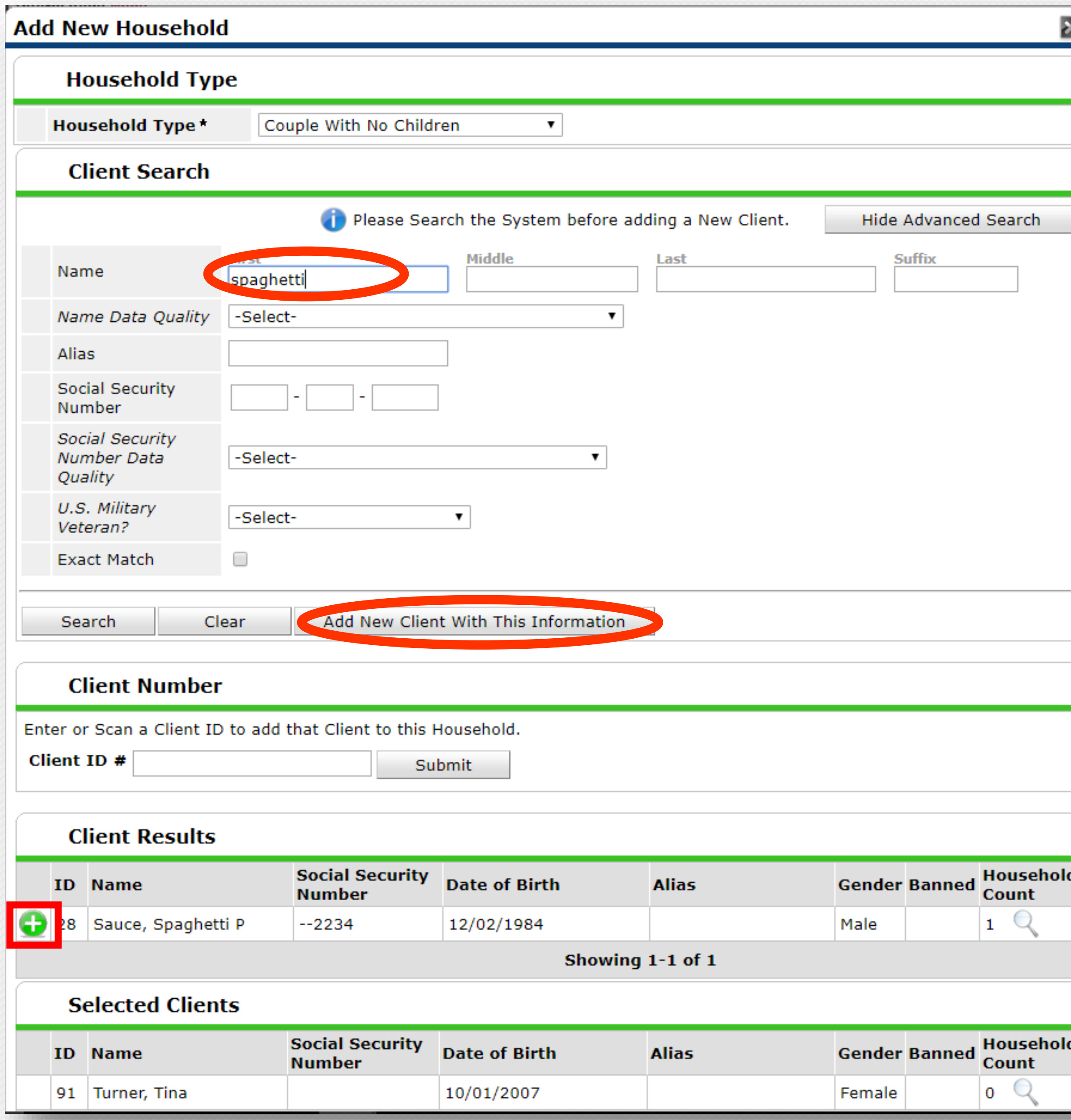
Add Family Members to Household

(Adding family members is optional, but encouraged if you have the information, but remember EVERYONE who participates in services needs to be included).

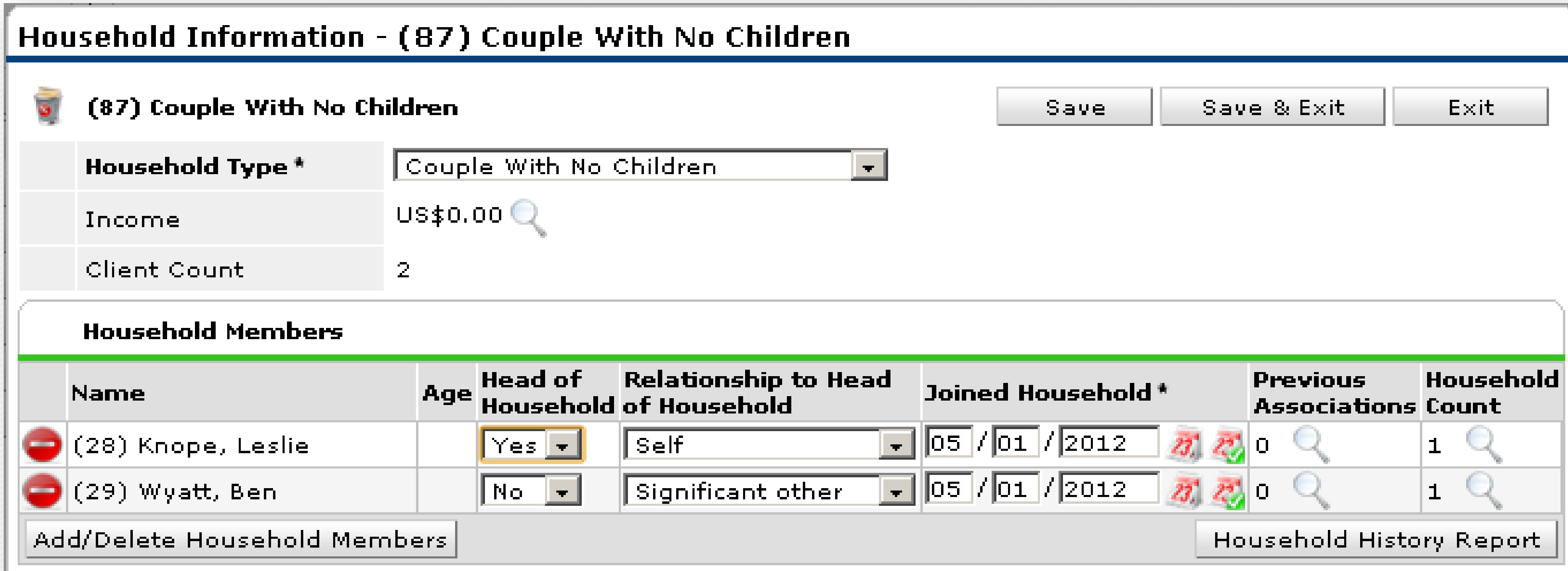
1. Search for the family member's name just as you searched for the first client.

2. If there is a match, click the **green plus sign** next to the name to add them to the household.

3. If there is NO match, complete **First** and **Last Name**, and click **Add New Client With This Information.**



Enter Household Information



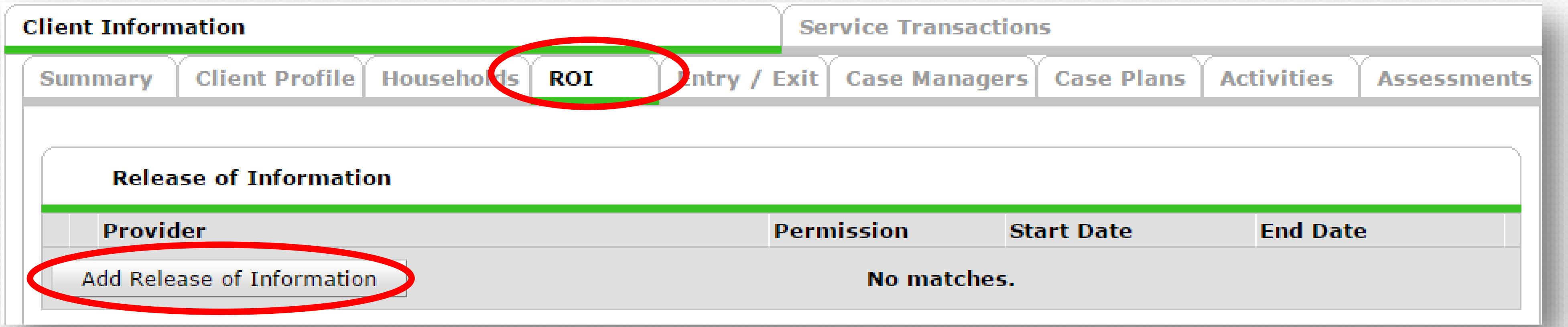
- There should only be 1 Head of Household
- Relationship is to the <u>Head of Household</u>
- Date Entered should be changed to the participant's Entry Date (Intake Date)

	Date Icons
	Select date from calendar
	Clear date fields
	Insert today's date

What is **Step 2** when you're enrolling a new client/household?

Release of Information (ROI)!

ROI Tab



Anyone who will be receiving direct services from a case manager MUST have 2 **ROI's** in **ServicePoint**:

- Their parent agency (Ex: *Hacienda CDC – SP*)
- The provider/program the client is entering (Ex: *Hacienda: SUN Youth Advocacy (SYA)*)

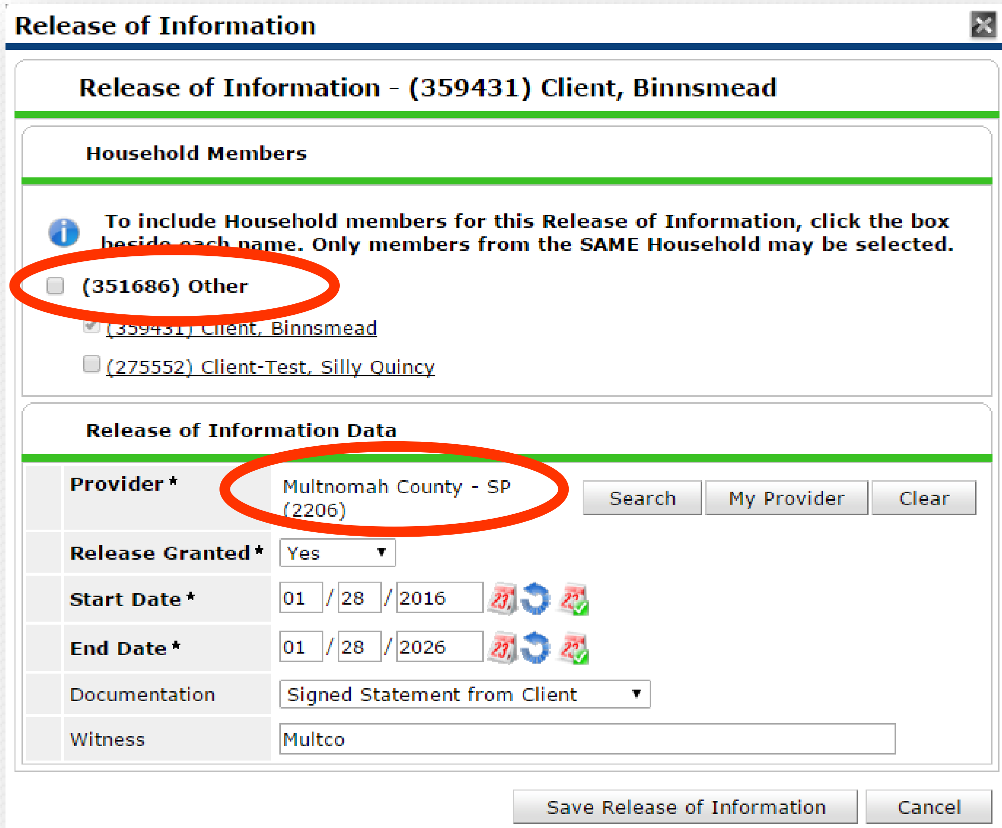
A correctly completed ROI must have answers for **Release Granted?, Start Date**, **End Date**, **Documentation** and **Witness**.*

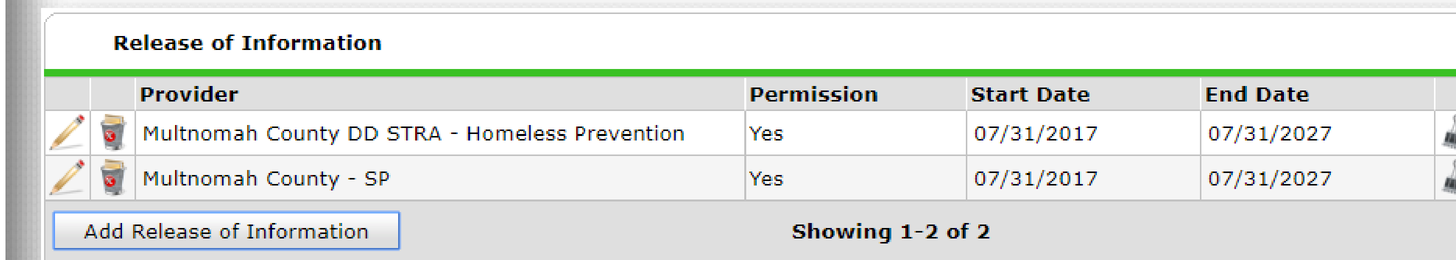
*Witness is always – MULTCO

*All of this work can be done from the Summary tab, through the ROI dashlet.

ClientPoint

ROI Tab – Add Release of Information





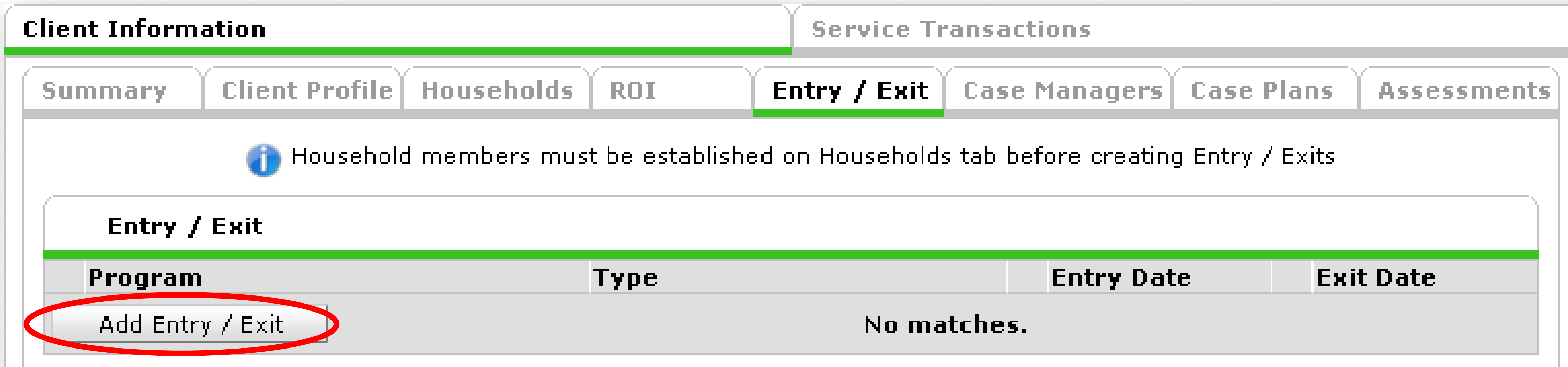
- Click the checkbox next to the household type to quickly include the client’s family in the **ROI**, if appropriate.
- For the first **ROI**, the Provider should be your Agency (e.g. IRCO, Human Solutions, Latino Network, etc).
- For the second **ROI**, the Provider should be your Program (e.g. IRCO: PCDS, Human Solutions: HUD Family Futures, etc).
- End Date should be the Start Date plus 10 years.
- Witness – type in the word “MULTCO”.

What is **Step 3** when you're enrolling a new client/household?

Entry / Exit!

ClientPoint

Entry/Exit Tab



Anyone who will be receiving direct services from a case manager MUST have an **Entry/Exit** in **ServicePoint**.

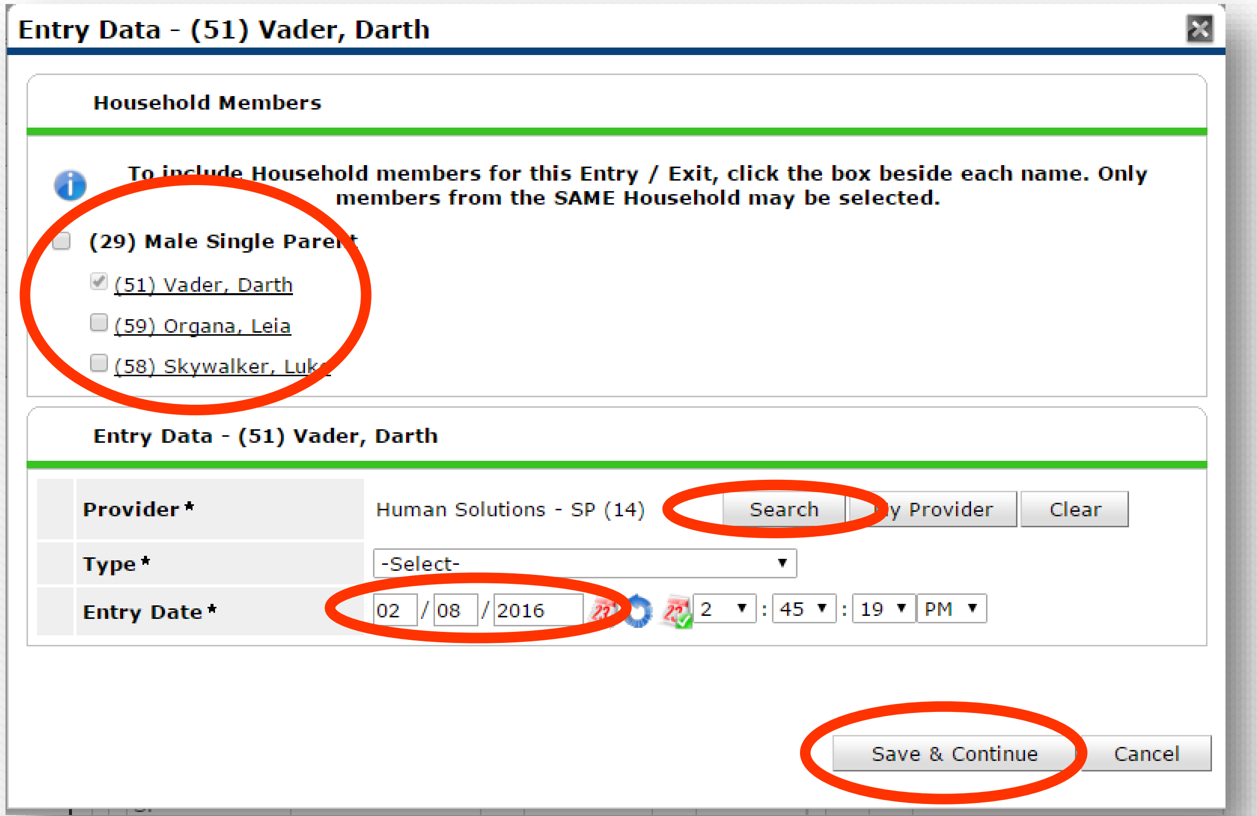
<u>If a client has no **Entry/Exit**, they will not be counted as receiving services</u>!

Clients should also have only ONE active **Entry/Exit** per program at a time, and dates across multiple **Entry/Exits** should not overlap.

*All of this work can be done from the Summary tab, through the Entry/Exit dashlet.

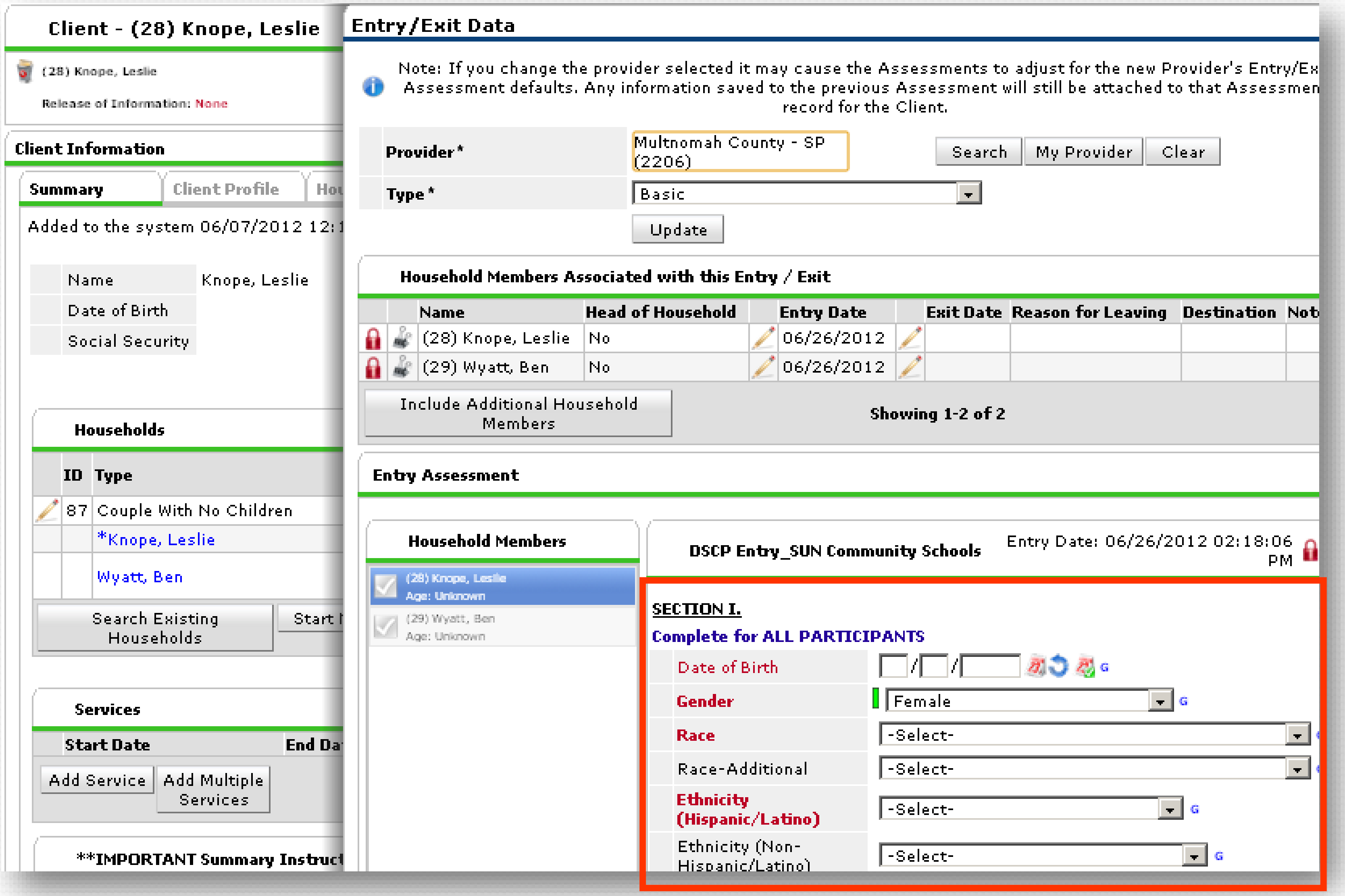
ClientPoint

Entry



- Click the checkbox next to the household type to quickly include the client's family in the **Entry/Exit.** ONLY create program entries for household members who are in services.
- Use the Search button to choose the program you are creating an entry for.
- Entry Type is always **BASIC.**
- The **Entry Date** defaults to today's date – **always change it to the date the client entered the program!**
- Click **Save & Continue**

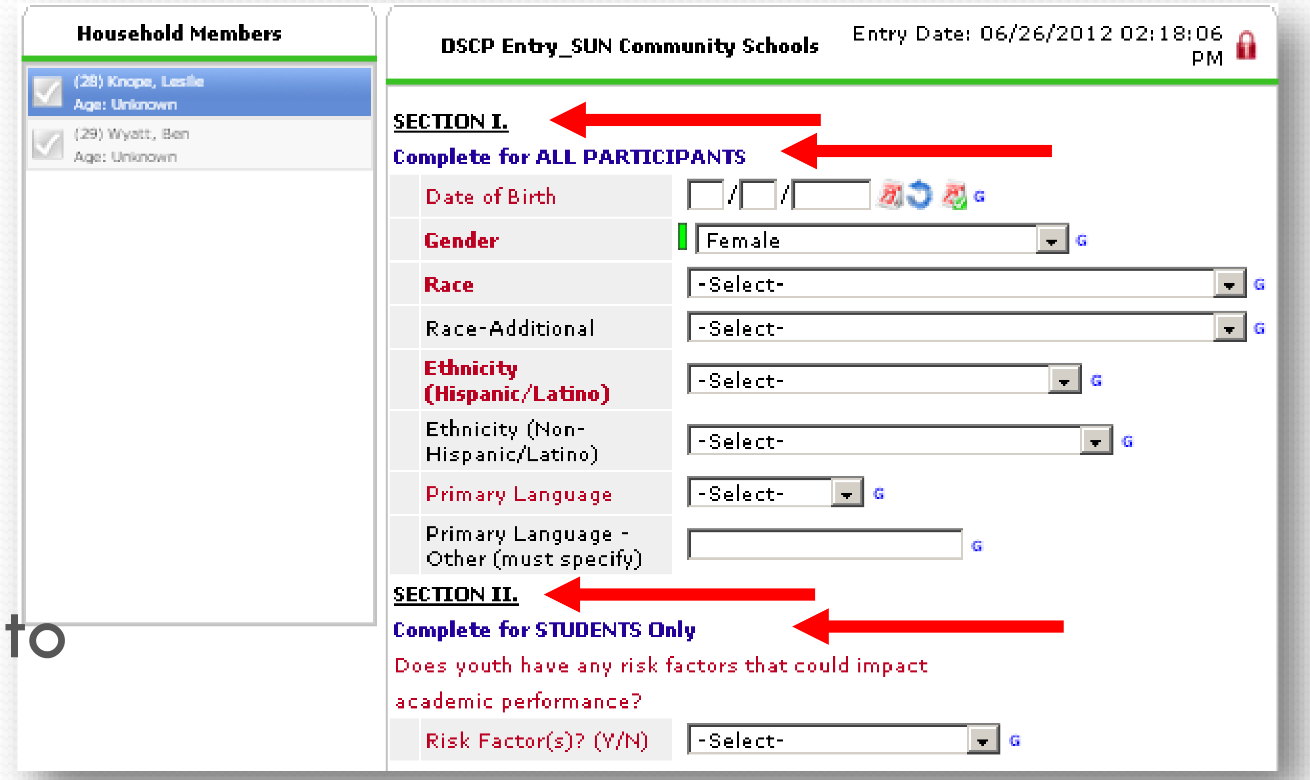
Entry Demographics



After selecting the correct **Type**, and clicking **Save & Continue**, the **Entry Demographics** section is now populated with questions.

Entry Demographics

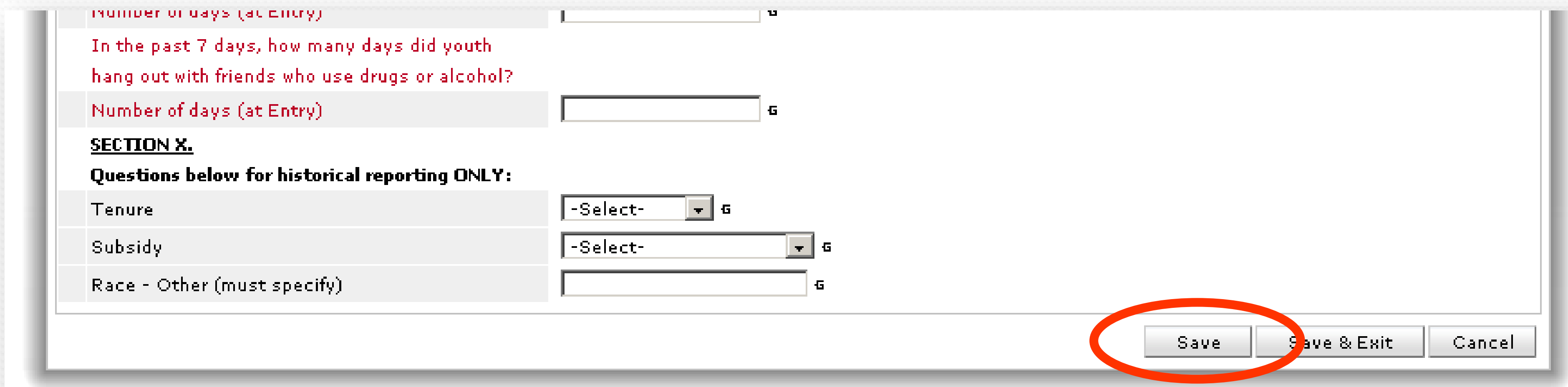
- All Entries are divided into sections identified as **Section I., Section II.,** etc.
- **Blue headers** specify which participants must have answers for each section.
- All participants must have answers to questions in **Section I.**



- All questions in **RED** are required for those participants. **Black** questions are optional.

Entry Demographics for Household Members

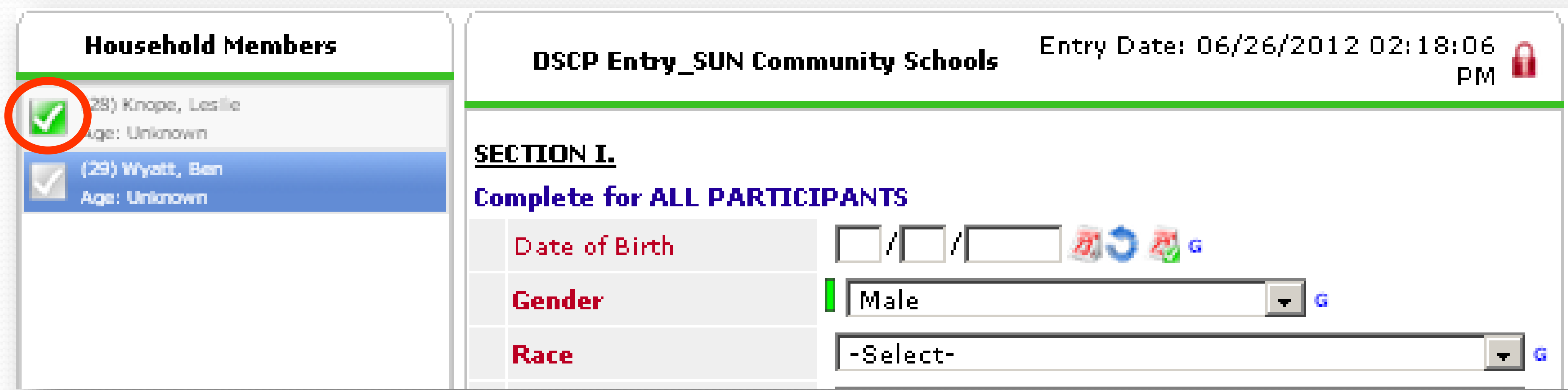
Entry demographics must be completed for all members of households included in the **Entry.**



To complete the Entry demographic questions of a participant's household members, click **Save** in the first client's **Entry/Exit…**

ClientPoint

Entry Demographics for Household Members



…then scroll to the top of the Entry. The checkmark next to the first client's name (under Household Members) will now be green. Click on the next household member's name to enter their Entry demographics.

What is **Step 4** when you're enrolling a client/household?

Service Transactions!

Service Transactions

Service Transactions is where you will record various services provided to an individual client or household at regular intervals.

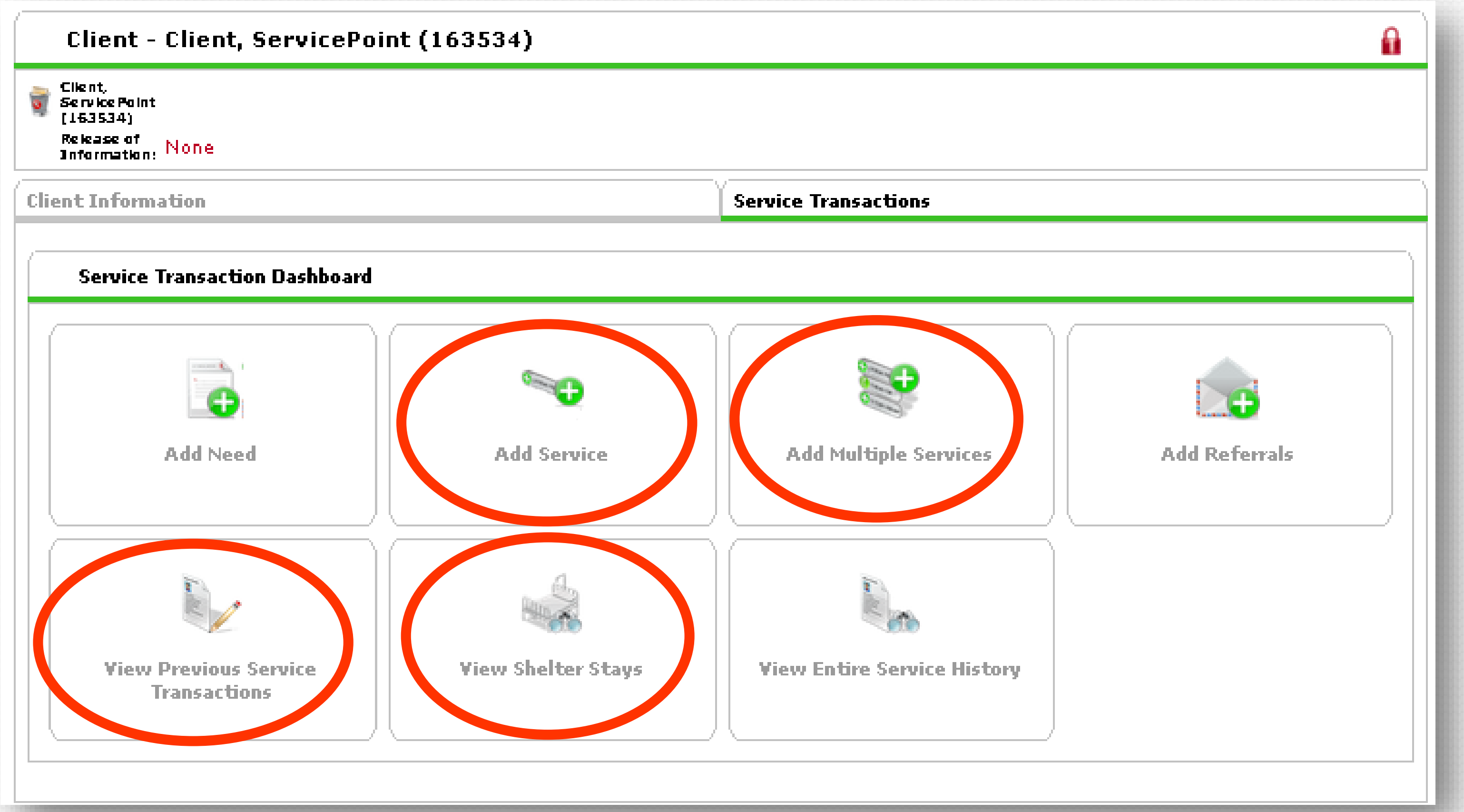
Types of services include Case Management, Skill-Building, Education, Recreation, etc.

For most programs, services of the same type may be entered cumulatively for the month, rather than separately for each date that services were provided. Check with the ServicePoint Helpline to find out how you should do it for your program.

*All of this work can be done from the Summary tab, through the Services dashlet.

ClientPoint

Service Transactions Tab

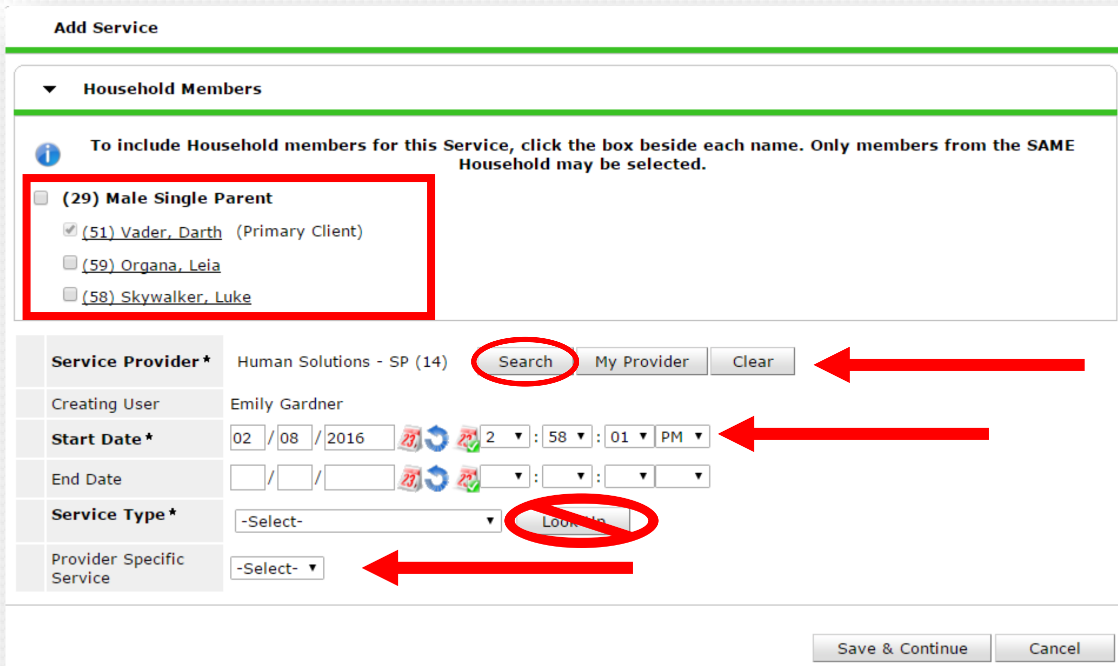


The main buttons in the **Service Transaction Dashboard** that you might use for entering data are **Add Service** and **Add Multiple Services**

You may also want to use **View Previous Service Transactions** for looking at a client's service history.

*All of this work can be done from the Summary tab, through the Entry/Exit dashlet.

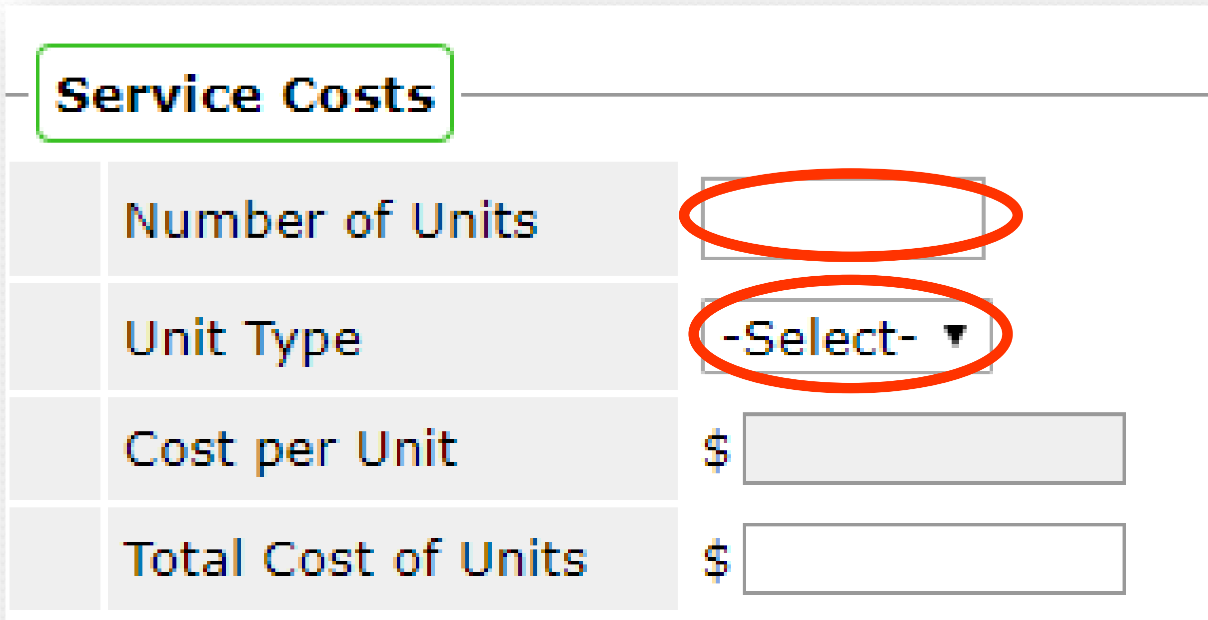
Add Service (Top)



DO NOT USE “Look Up” button

- Select any members of the client’s household who benefited from this service in the **Household Members** section.
- Use the **Search Button** to find the correct program.
- **Start Date** is the date services were provided (or the last day of the month for cumulative services).
- **Provider Specific Service** is the actual service provided (Case Management, etc.)

Add Service (Bottom)

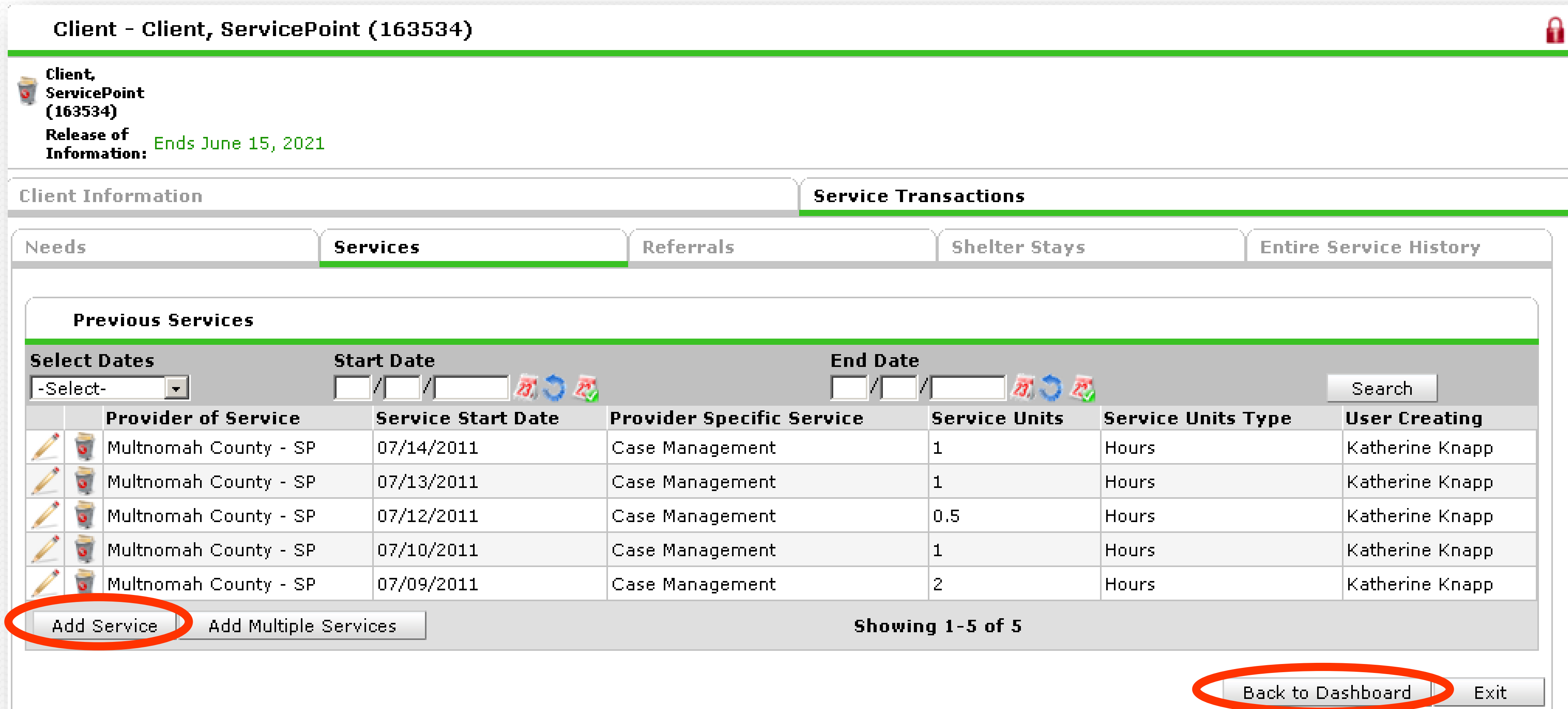


Number of Units = money or time spent. Time is in .25 increments

Unit Type = dollars, hours, count or screenings

- **Number of Units** and **Unit Type** are in a section called Service Cost
- Cost per Unit and Total Cost of Units are NOT used
- Click **Save & Exit** to save the service.

Add Another Service

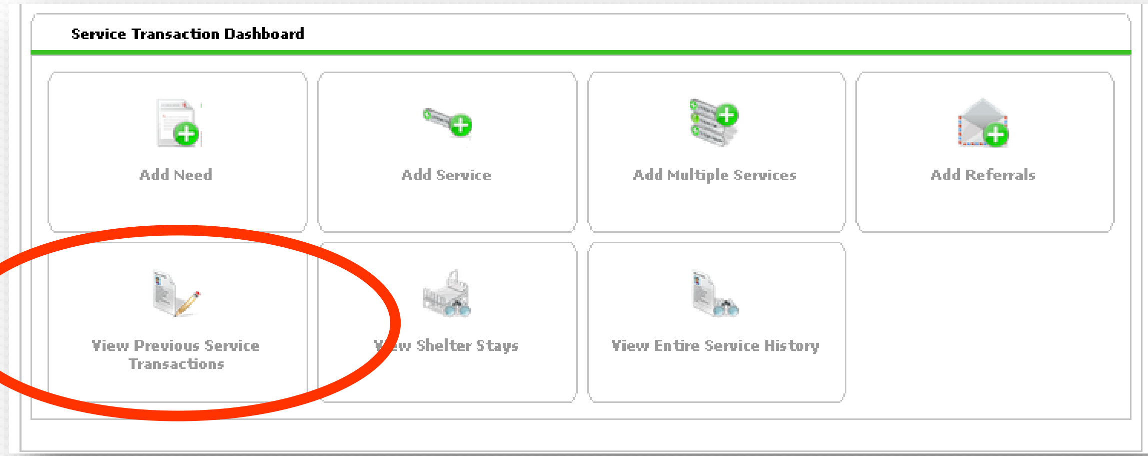


- To add another service, click **Add Service.**
- To return to the **Service Transactions Dashboard**, click **Back to Dashboard.**

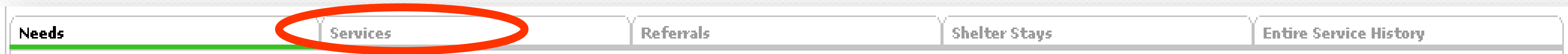
ClientPoint

View Services

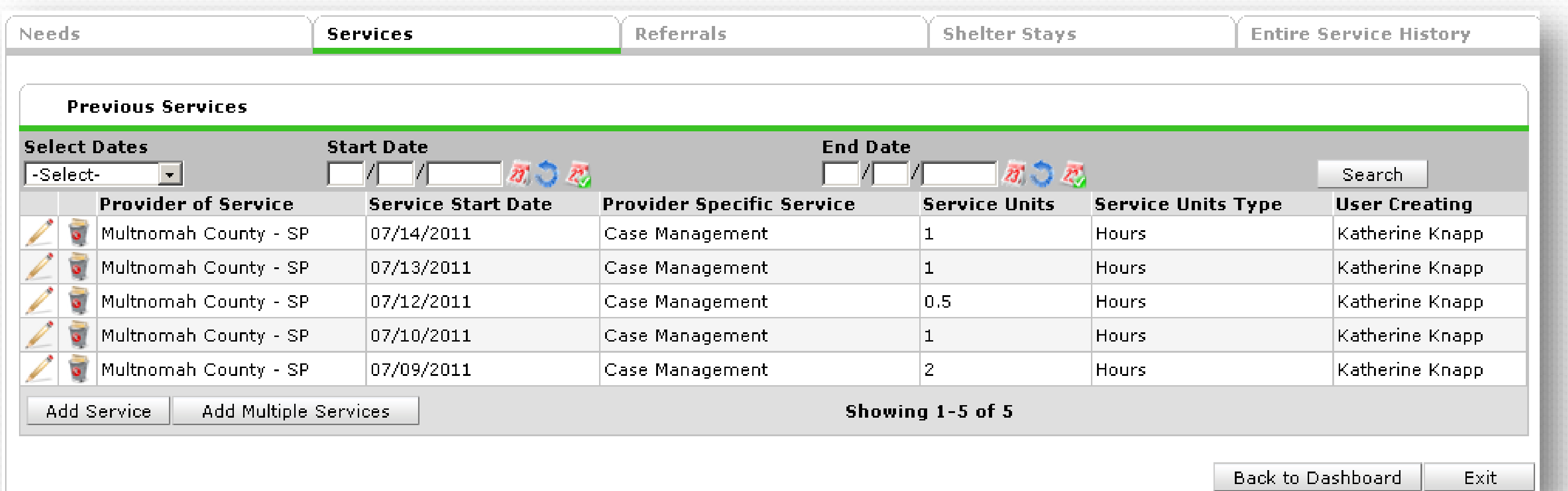
1. In the dashboard, click **View Previous Service Transactions.**



2. Click the **Services** tab in the next screen.



3. The client's service history is displayed.



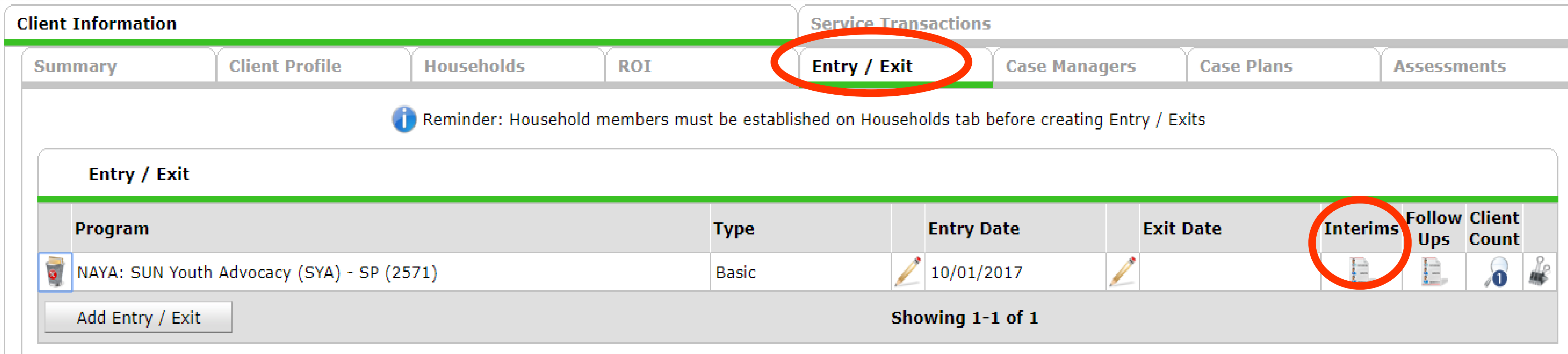
Provider of Service	Service Start Date	Provider Specific Service	Service Units	Service Units Type	User Creating
Multnomah County - SP	07/14/2011	Case Management	1	Hours	Katherine Knapp
Multnomah County - SP	07/13/2011	Case Management	1	Hours	Katherine Knapp
Multnomah County - SP	07/12/2011	Case Management	0.5	Hours	Katherine Knapp
Multnomah County - SP	07/10/2011	Case Management	1	Hours	Katherine Knapp
Multnomah County - SP	07/09/2011	Case Management	2	Hours	Katherine Knapp

What is **Step 5** when you're enrolling a client/household?

Interim Reviews (if applicable)!

ClientPoint

Interim Reviews

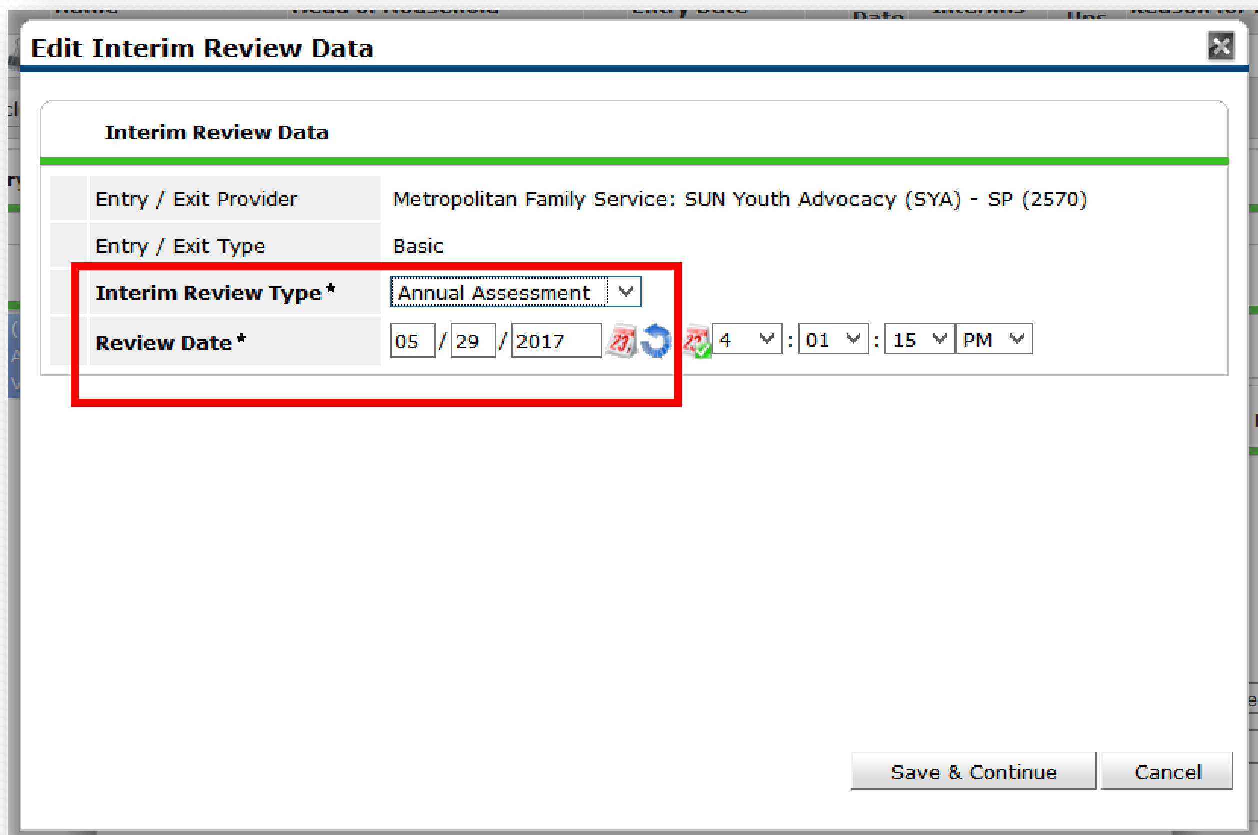


Some programs have one assessment that requires clicking the **Interims** button next to the Entry and Exit Dates to answer additional project-specific questions.*

*This step should be done through the Entry/Exit tab.

ClientPoint

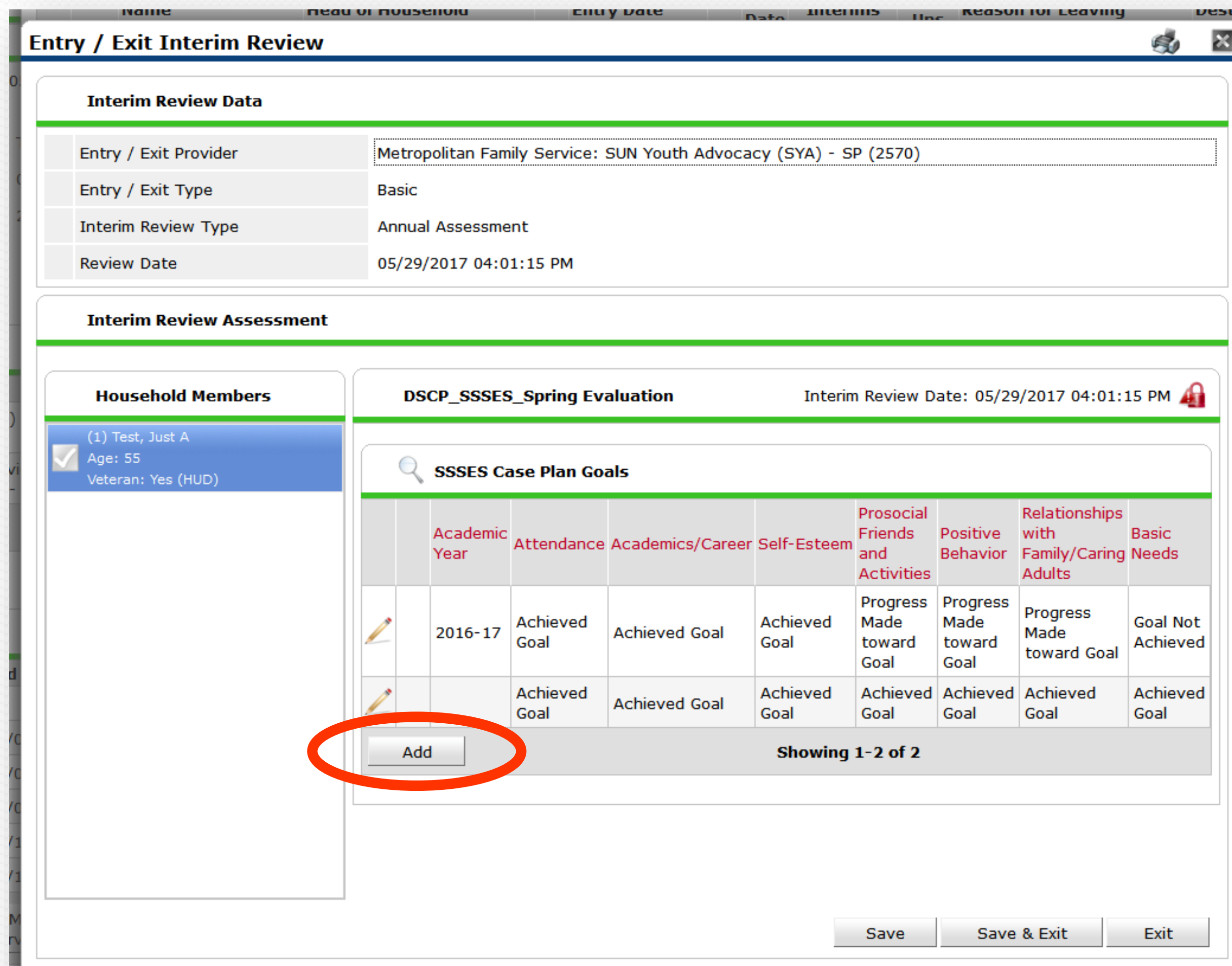
Interim Reviews



1. The **Interim Review Type** should be Annual Assessment.
2. The **Review Date** should be the date the assessment was completed.

ClientPoint

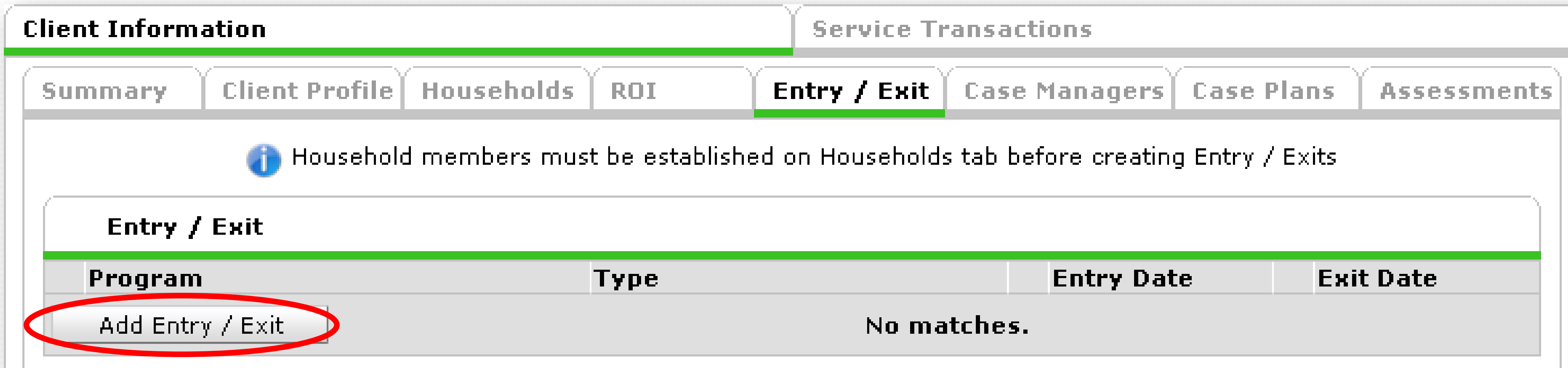
Interim Reviews



1. When the assessment opens, just click Add to enter new assessment information.

2. When all of the questions are answered, click **Save & Exit.**

Entry/Exit Tab



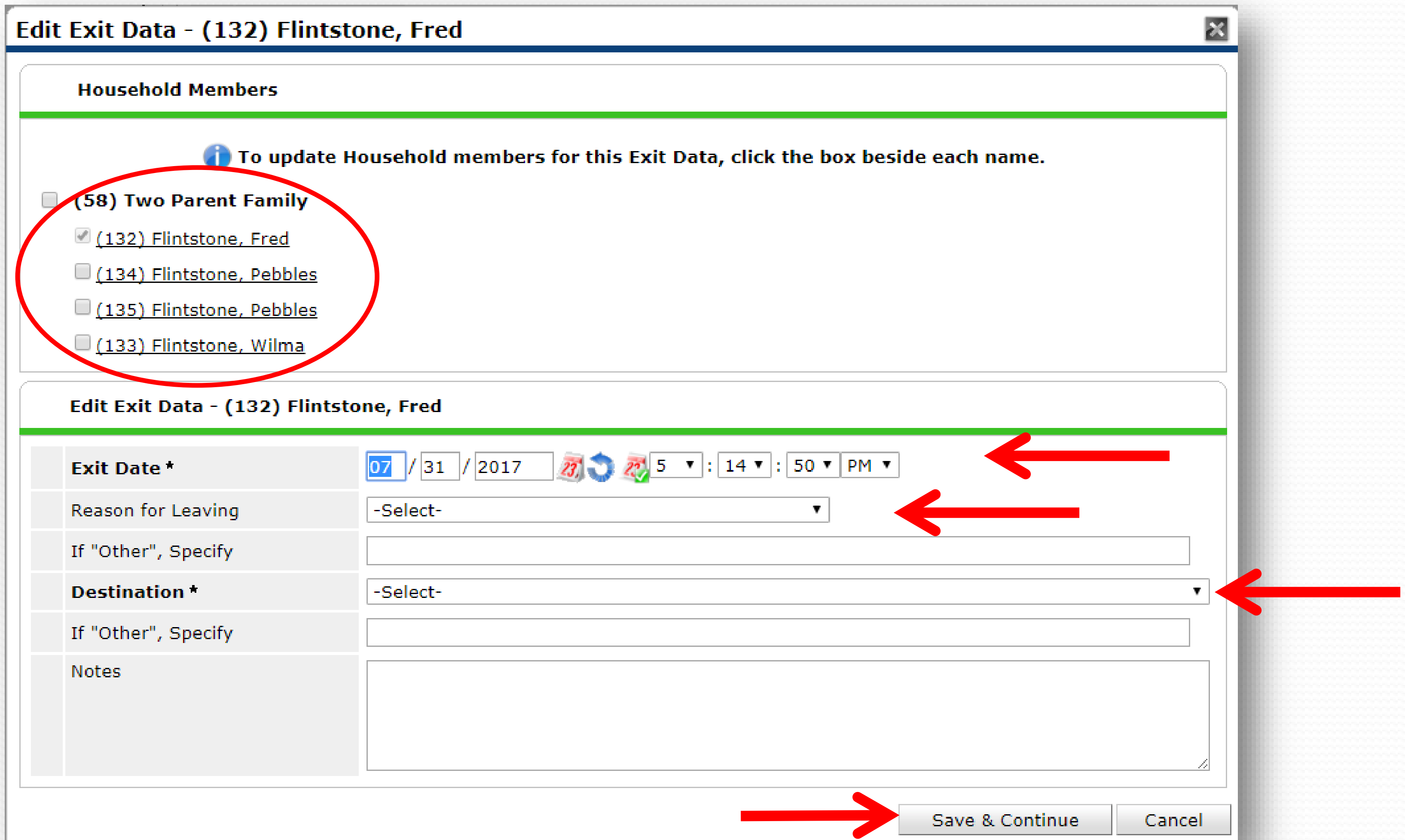
Anyone who will be receiving direct services from a case manager MUST have an **Entry/Exit** in **ServicePoint**.

Clients should also have only ONE active **Entry/Exit** per program at a time, and dates across multiple **Entry/Exits** should not overlap.

Clients should be exited when they are done receiving services, or if they have a 90 day gap in services.

*All of this work can be done from the Summary tab, through the Entry/Exit dashlet.

Exit



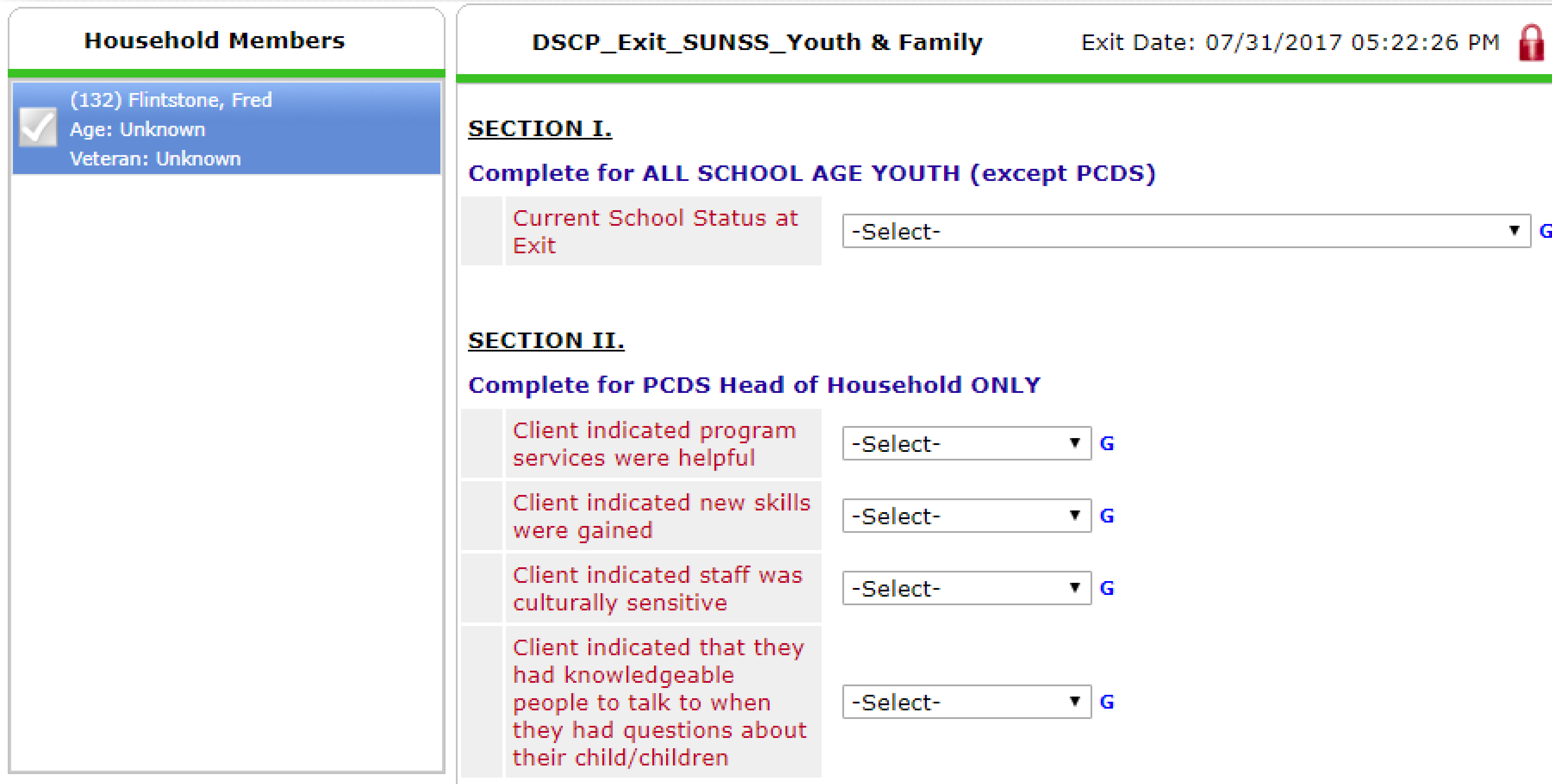
- Click the checkbox next to the household type to quickly include the client's family in the **Exit.**
- Set **Exit Date** to the date they left/completed your program
- Answer the **Reason for Leaving** question
- Answer the **Destination** question
- Click **Save and Continue**

ClientPoint

Exit Outcomes

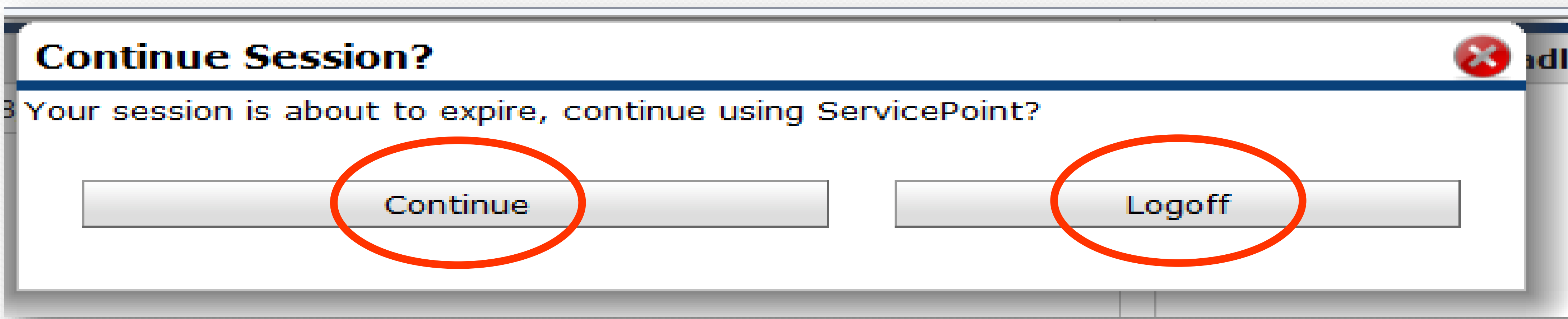
Once you click **Save** & **Continue**, the **Exit** section is now populated with questions.

Complete all the red questions within the exit assessment, and Click **Save & Exit** at the bottom.



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

The End!

ServicePoint Helpline

Hours: Monday – Friday – 7:30am-5pm

503-970-4408

servicepoint@multco.us

ServicePoint Homepage

ServicePoint Training Manuals

ServicePoint User Set-Up/Modify/Delete