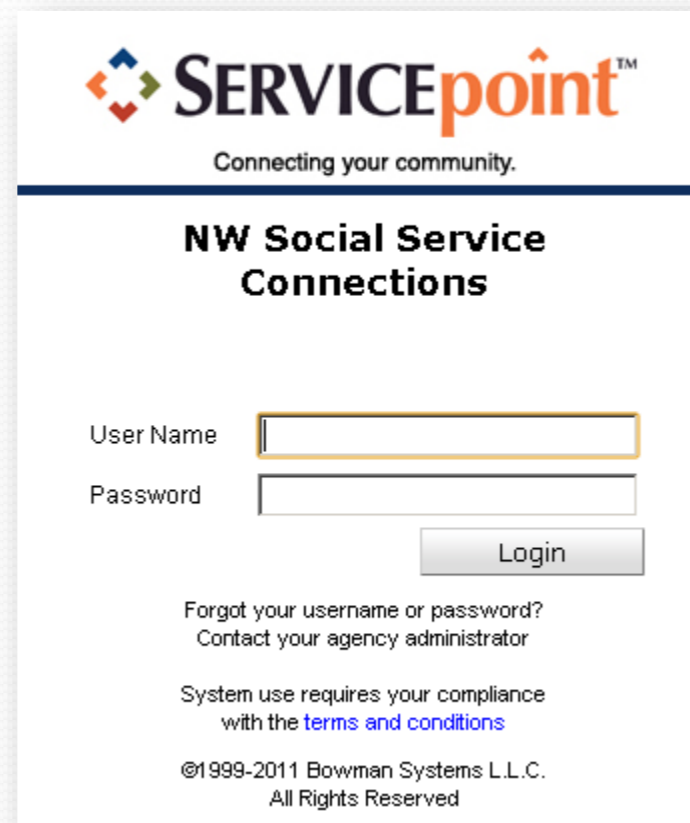





Department of County Human Services
Youth & Family Services Division

ServicePoint New User Training



 **SERVICEpoint™**
Connecting your community.

**NW Social Service
Connections**

User Name

Password

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, service, and program outcome data for Multnomah County Youth and Family Services Division programs.

The **ServicePoint** web address is:

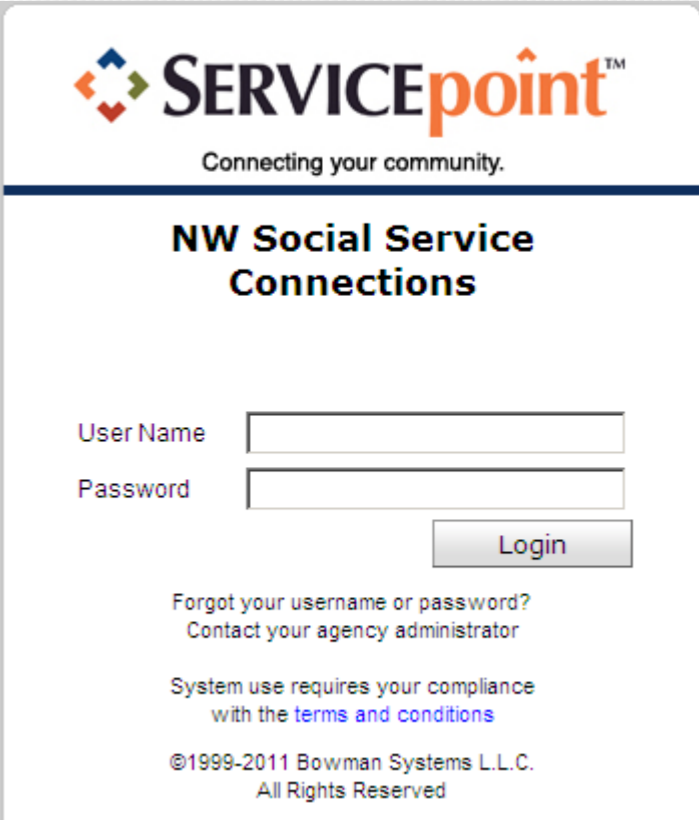
<https://portland.servicept.com>

All data must be entered into **ServicePoint** by the 15th 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.

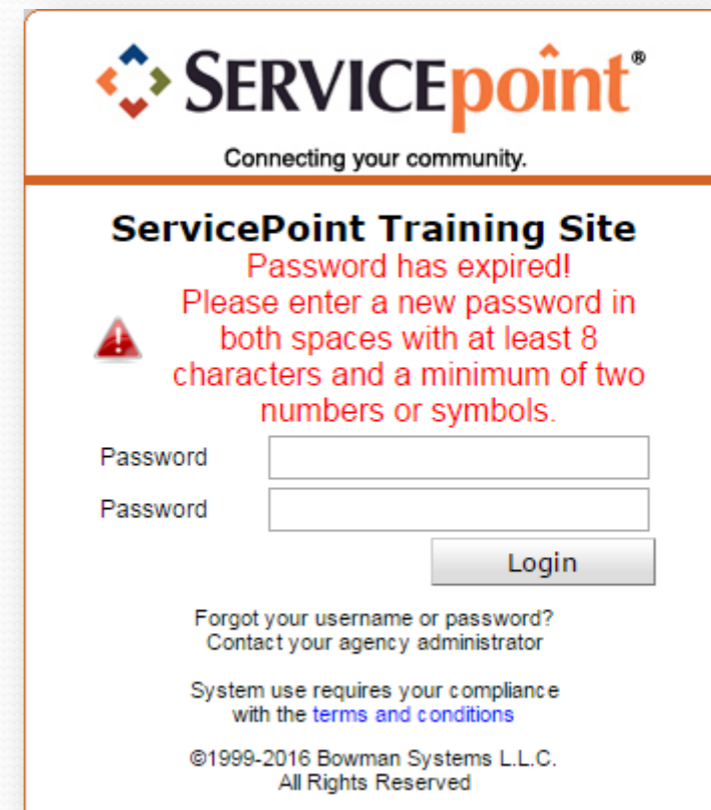
Contact the **ServicePoint** helpline at 503-970-4408 to have your account reactivated.



The screenshot shows the ServicePoint login interface. 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 two input fields: "User Name" and "Password". 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". At the bottom, there is a disclaimer: "System use requires your compliance with the [terms and conditions](#)" and a copyright notice: "©1999-2011 Bowman Systems L.L.C. All Rights Reserved".

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.

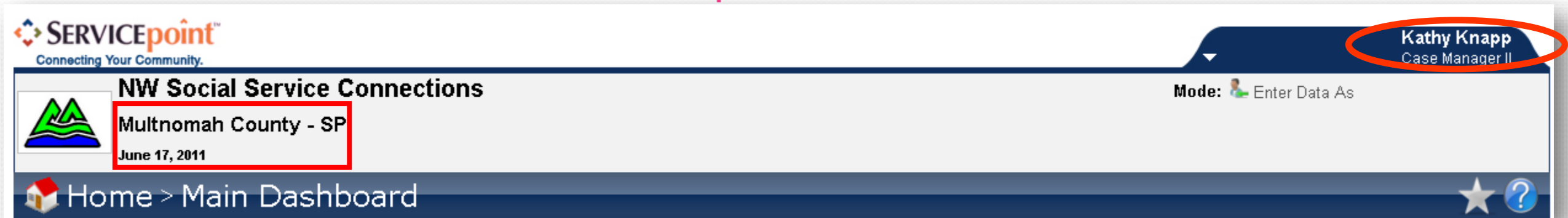


The screenshot shows the ServicePoint logo at the top with the tagline "Connecting your community." Below this, the page is titled "ServicePoint Training Site" and displays a red warning message: "Password has expired! Please enter a new password in both spaces with at least 8 characters and a minimum of two numbers or symbols." There are two password input fields, each labeled "Password", and a "Login" button. At the bottom, there are links for "Forgot your username or password? Contact your agency administrator" and "System use requires your compliance with the terms and conditions". The footer contains the copyright notice: "©1999-2016 Bowman Systems L.L.C. All Rights Reserved".



Let's start looking
at **ServicePoint Dashboard!**

Top Banner



The screenshot shows the top banner of the SERVICEpoint interface. On the left, the SERVICEpoint logo is displayed above the text "Connecting Your Community." Below this, a navigation breadcrumb reads "Home > Main Dashboard". The main content area is titled "NW Social Service Connections" and includes a sub-section for "Multnomah County - SP" with the date "June 17, 2011". On the right side, the user's name "Kathy Knapp" and title "Case Manager II" are shown in a dark blue box, which is circled in red. Below the name, the text "Mode: Enter Data As" is visible. In the bottom right corner, there are icons for a star and a question mark.

- 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

System and Agency News

System News (3)		Agency News (1)
Date	Headline	
10/04/2017	Training Site Refreshed 10/04/2017	
03/02/2017	Cannot find client by their number, REMEMBER to search by Client Name.	
01/01/2011	NWSSC HMIS/CMIS Contacts and Document information	

Add System News View All

View 1: ServicePoint News

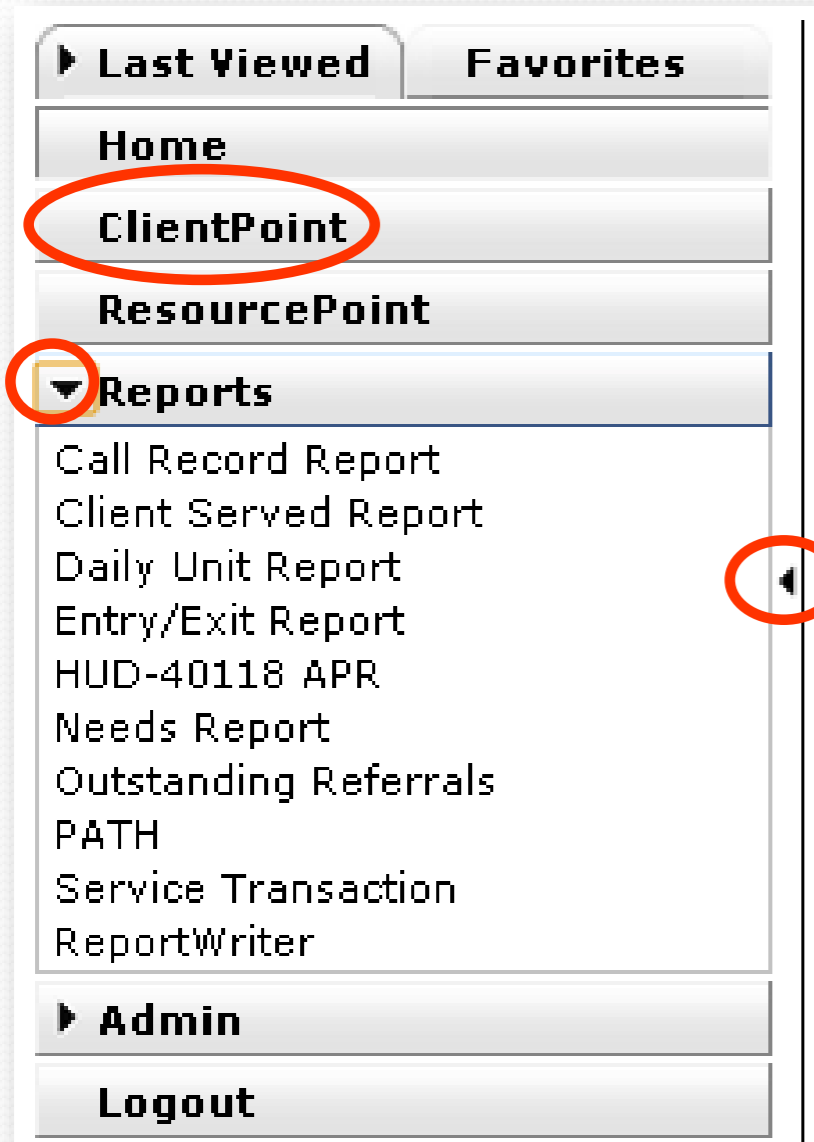
System News (3)		Agency News (1)
Date	Headline	
12/22/2006	ServicePoint Homepage, Multnomah County ServicePoint Helpline & Data Entry Guides	

Add Agency News View All

View 2: Agency News

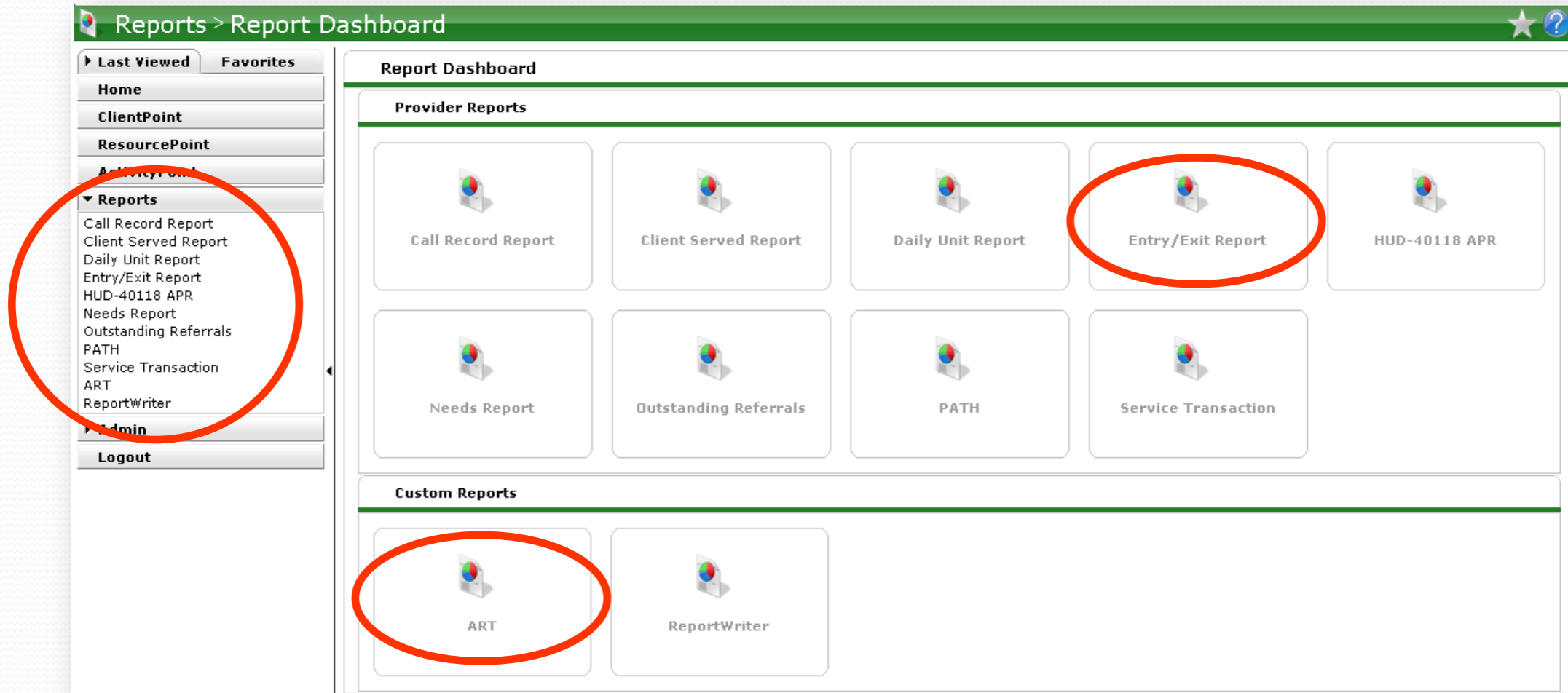
- **System News** are updates from the Portland Housing Bureau.
- **Agency News** are updates from Multnomah County. Click the appropriate tab to view the news items.
- News subjects display as [hyperlinks](#). Click a news item to open and view it.

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.)

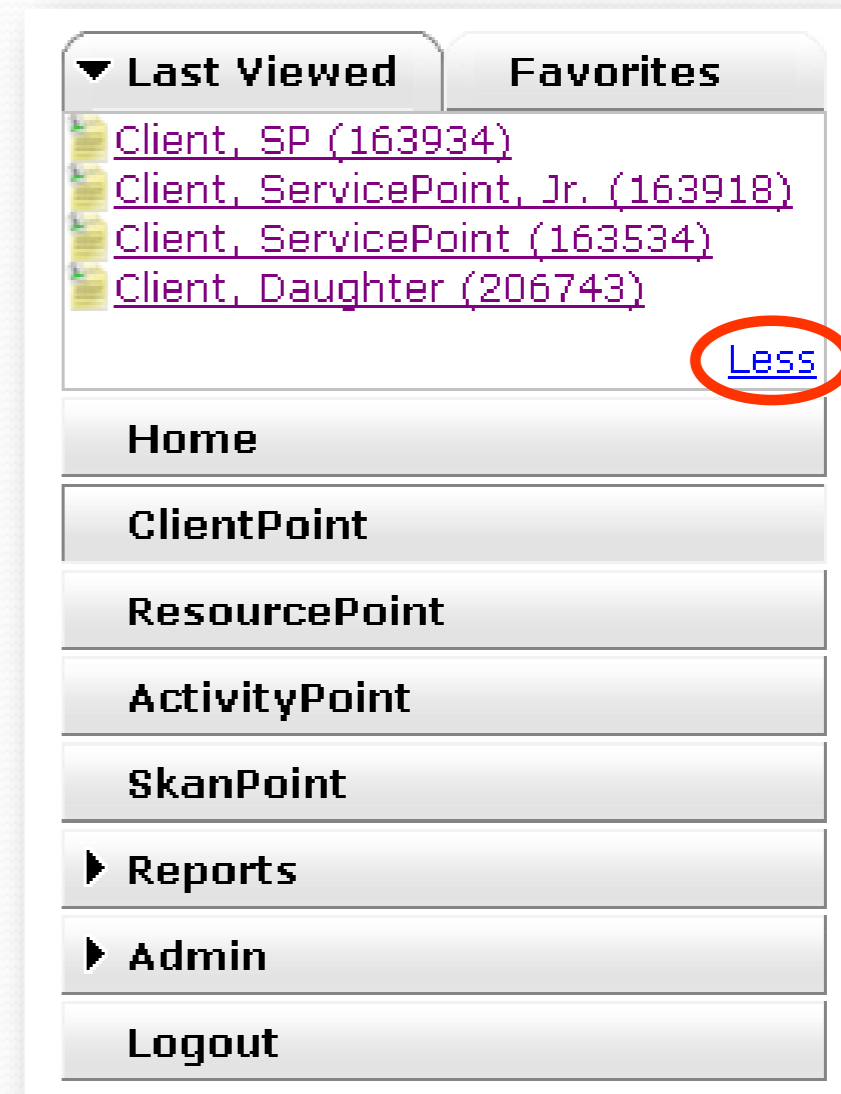
We strongly recommend at least running the Entry/Exit report regularly to track data that you've entered.

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.

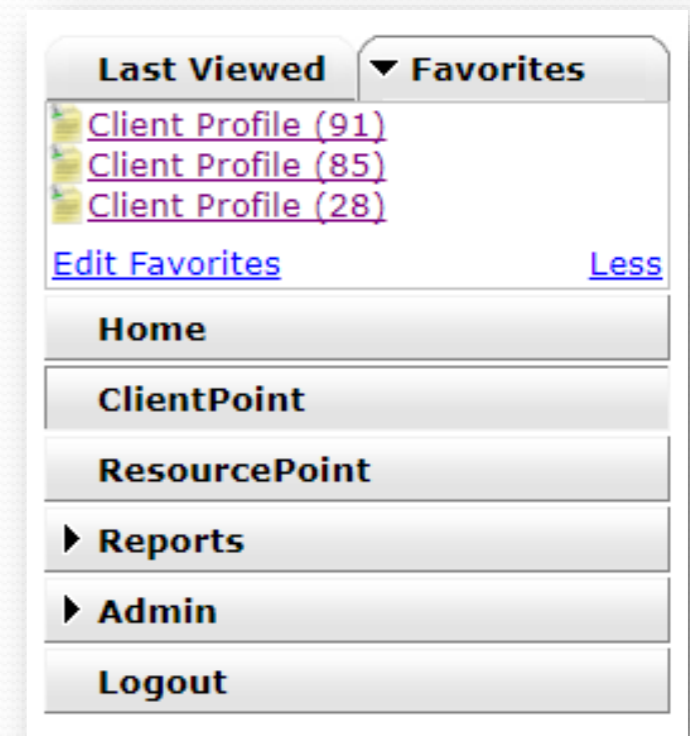
- Clients display with Last Name, First Name, and ClientID
- Less and More allow you to collapse to the most recent 5 clients, or expand to see the whole list



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...**

Searching for Clients

Client Search

Please Search the System before adding a New Client.





















Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	-Select-			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	⊘			

Client Number



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

- 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

Adding A New Client Record

Client Search

Please Search the System before adding a New Client.

Name	First Tina	Middle	Last Turner	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number	- - -			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			


Search Clear **Add New Client With This Information**

Client Number

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

Client ID # Submit

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...

Welcome to the Client's Record

The tab you are
on will be
underlined in
GREEN



Client Information

Summary
Client Profile
Households
ROI

Added to the system 03/15/2006 12:39 PM

Name	826sn2o1y42415a2i, HOH	Gender	
Date of Birth		Primary Race	
Social Security		Secondary Race	
		U.S. Military Veteran?	No (HUD)

Households

ID	Type	Head of Household	Relationship
16291	Female Single Parent		
	*826sn2o1y42415a2i, HOH	Yes	Self

Entry/Exits

Program	Type	Entry Date	Exit Date
No matches.			

Service Transactions

Entry / Exit
Case Managers
Case Plans
Assessments

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Services

Start Date	End Date	Provider
No matches.		

****IMPORTANT Summary Instructions!****

FIVE Steps to Enrolling a Client/Household:

1. Create New or Use Existing Household
2. Add ROI
3. Add Entry
4. Add Assessments (if applicable)
5. Add Service Transaction(s)

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.

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**.

The screenshot shows a client record for 'Client - Client, ServicePoint (163534)'. The interface includes a header with the client name and a lock icon. Below the header, there is a section for 'Client, ServicePoint (163534)' with a 'Release of Information' status that 'Ends June 15, 2021'. The main content area is divided into two main tabs: 'Client Information' (highlighted with a green border) and 'Service Transactions' (highlighted with a red border). Under 'Client Information', there are sub-tabs: 'Summary' (highlighted with a green border), 'Client Profile', 'Households' (marked with a circled 1), 'ROI' (marked with a circled 2), 'Entry / Exit' (marked with a circled 3), 'Case Managers' (marked with a circled 5), 'Case Plans' (marked with an X), and 'Assessments' (marked with an X). Under 'Service Transactions', there is a sub-tab 'Entry / Exit' (marked with a circled 4). The 'Case Managers' and 'Assessments' sub-tabs have 'X' marks over them, indicating they are closed or unavailable.

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...

Summary Tab

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Activities

Assessments

Added to the system 01/29/2018 12:28 PM

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">Name</td><td>Flintstone, Fred</td></tr> <tr><td>Date of Birth</td><td></td></tr> <tr><td>Social Security</td><td></td></tr> </table>	Name	Flintstone, Fred	Date of Birth		Social Security		<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">Gender</td><td></td></tr> <tr><td>Primary Race</td><td></td></tr> <tr><td>Secondary Race</td><td></td></tr> <tr><td>U.S. Military Veteran?</td><td></td></tr> </table>	Gender		Primary Race		Secondary Race		U.S. Military Veteran?	
Name	Flintstone, Fred														
Date of Birth															
Social Security															
Gender															
Primary Race															
Secondary Race															
U.S. Military Veteran?															

Households

ID	Type	Head of Household	Relationship
<input type="button" value="Search Existing Households"/> <input type="button" value="Start New Household"/>			

Entry/Exits

Program	Type	Project Start Date	Exit Date
<input type="button" value="Add Entry / Exit"/>			
No matches.			

Services

Start Date	End Date	Provider
<input type="button" value="Add Service"/> <input type="button" value="Add Multiple Services"/>		
No matches.		

Shelter Stays

Start Date	End Date	Provider
No matches.		

IMPORTANT Summary Instructions!

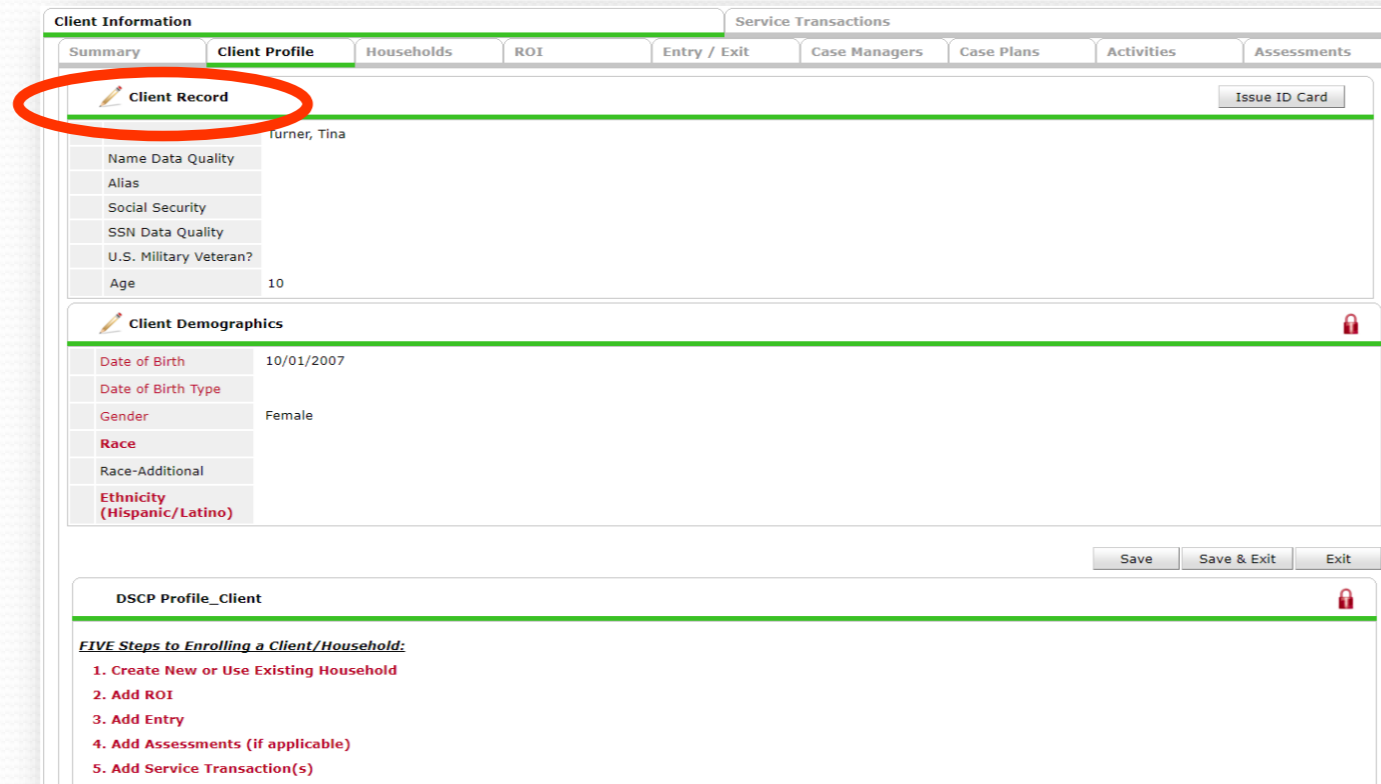
FIVE Steps to Enrolling a Client/Household:

1. Create New or Use Existing Household
2. Add ROI
3. Add Entry
4. Add Assessments (if applicable)
5. Add Service Transaction(s)

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.

Client Profile Tab



The screenshot shows the 'Client Profile' tab in the ClientPoint software. The 'Client Record' section is circled in red, indicating where to click to edit the client's name. The 'Client Demographics' section is also visible, showing fields for Date of Birth, Gender, Race, and Ethnicity. The 'Client Record' section includes a pencil icon and the text 'Client Record' next to the client's name, 'Turner, Tina'. The 'Client Demographics' section includes fields for Date of Birth (10/01/2007), Date of Birth Type, Gender (Female), Race, Race-Additional, and Ethnicity (Hispanic/Latino). The 'Client Record' section also includes a table with the following data:

Field	Value
Name Data Quality	
Alias	
Social Security	
SSN Data Quality	
U.S. Military Veteran?	
Age	10

The 'Client Demographics' section also includes a 'Save' button, a 'Save & Exit' button, and an 'Exit' button. The 'Client Record' section also includes an 'Issue ID Card' button. The 'Client Demographics' section is locked, indicated by a red padlock icon. The 'Client Record' section is also locked, indicated by a red padlock icon. The 'Client Record' section is also locked, indicated by a red padlock icon.

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!

Households Tab

The screenshot shows the ClientPoint interface with the 'Households' tab selected. The 'Start New Household' button is circled in red.

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments
Households Overview							
Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income	
Search to Add this Client to an Existing Household			Start New Household				

- You must create a household for all 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

Add New Household

Household Type	
Household Type *	-Select- <input type="button" value="v"/>
Client Search	
Name	<input type="text"/>
Alias	<input type="text"/>
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>
Social Security Number Data Quality	-Select- <input type="button" value="v"/>

Firs

- Select-
- Select-
- Single Individual
- Female Single Parent
- Male Single Parent
- Two Parent Family
- Grandparent(s) and Child
- Foster Parent(s)
- Couple With No Children
- Non-custodial Caregiver(s)
- Family Unit (HOPWA)
- Shared Housing (HOPWA)
- Living with a live-in aide (HOPWA)
- Other

- **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**.

Add New Household

Household Type

Household Type * Couple With No Children

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name Middle Last Suffix

Name Data Quality -Select-

Alias

Social Security Number - -

Social Security Number Data Quality -Select-

U.S. Military Veteran? -Select-

Exact Match

Search Clear Add New Client With This Information

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
+ 28	Sauce, Spaghetti P	--2234	12/02/1984		Male		1


Showing 1-1 of 1

Selected Clients


ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
91	Turner, Tina		10/01/2007		Female		0

Enter Household Information

Household Information - (87) Couple With No Children











 **(87) Couple With No Children** Save Save & Exit Exit

Household Type *



Income 

Client Count

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
 (28) Knope, Leslie		<input type="text" value="Yes"/>	<input type="text" value="Self"/>	<input type="text" value="05 / 01 / 2012"/>  	<input type="text" value="0"/> 	<input type="text" value="1"/> 
 (29) Wyatt, Ben		<input type="text" value="No"/>	<input type="text" value="Significant other"/>	<input type="text" value="05 / 01 / 2012"/>  	<input type="text" value="0"/> 	<input type="text" value="1"/> 

- There should only be 1 Head of Household
- Relationship is to the Head of Household
- 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



Client Information		Service Transactions						
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Activities	Assessments
Release of Information								
Provider	Permission	Start Date	End Date					
Add Release of Information	No matches.							

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.

ROI Tab – Add Release of Information

Release of Information

Release of Information - (359431) Client, Binnsmead

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

(351686) Other

(359431) Client, Binnsmead

(275552) Client-Test, Silly Quincy

Release of Information Data

Provider * Multnomah County - SP (2206)

Release Granted * Yes

Start Date * 01 / 28 / 2016

End Date * 01 / 28 / 2026

Documentation Signed Statement from Client

Witness Multco

Release of Information

	Provider	Permission	Start Date	End Date	
	Multnomah County DD STRA - Homeless Prevention	Yes	07/31/2017	07/31/2027	
	Multnomah County - SP	Yes	07/31/2017	07/31/2027	

Showing 1-2 of 2

- 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!

Entry/Exit Tab

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

i Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date
No matches.			

Add Entry / Exit

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

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

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.**

Entry

Entry Data - (51) Vader, Darth

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(29) Male Single Parent

(51) Vader, Darth

(59) Organa, Leia

(58) Skywalker, Luk

Entry Data - (51) Vader, Darth

Provider *	Human Solutions - SP (14)	<input type="button" value="Search"/>	<input type="button" value="By Provider"/>	<input type="button" value="Clear"/>
Type *	-Select-			
Entry Date *	02 / 08 / 2016	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	2 : 45 : 19 PM

- 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

Client - (28) Knope, Leslie

(28) Knope, Leslie
Release of Information: None

Client Information

Summary | Client Profile | Hos

Added to the system 06/07/2012 12:1

Name	Knope, Leslie
Date of Birth	
Social Security	

Households

ID	Type
87	Couple With No Children
	*Knope, Leslie
	Wyatt, Ben

Search Existing Households | Start

Services

Start Date	End Da

Add Service | Add Multiple Services

****IMPORTANT Summary Instruct**

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * Multnomah County - SP (2206)

Type * Basic

Household Members Associated with this Entry / Exit

Name	Head of Household	Entry Date	Exit Date	Reason for Leaving	Destination	Not
(28) Knope, Leslie	No	06/26/2012				
(29) Wyatt, Ben	No	06/26/2012				

Include Additional Household Members Showing 1-2 of 2

Entry Assessment

Household Members

<input checked="" type="checkbox"/>	(28) Knope, Leslie Age: Unknown
<input checked="" type="checkbox"/>	(29) Wyatt, Ben Age: Unknown

DSCP Entry_SUN Community Schools Entry Date: 06/26/2012 02:18:06 PM

SECTION I.
Complete for ALL PARTICIPANTS

Date of Birth / /

Gender Female

Race -Select-

Race-Additional -Select-

Ethnicity (Hispanic/Latino) -Select-

Ethnicity (Non-Hispanic/Latino) -Select-

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.

The screenshot displays the 'Household Members' list on the left and the 'DSCP Entry_SUN Community Schools' form on the right. The form is divided into two sections:

- SECTION I. Complete for ALL PARTICIPANTS** (indicated by a red arrow): This section contains questions in black text, including Date of Birth, Gender (Female), Race, Race-Additional, Ethnicity (Hispanic/Latino), Ethnicity (Non-Hispanic/Latino), Primary Language, and Primary Language - Other (must specify).
- SECTION II. Complete for STUDENTS Only** (indicated by a red arrow): This section contains a question in red text: 'Does youth have any risk factors that could impact academic performance?' with a dropdown menu for 'Risk Factor(s)? (Y/N)'.

Entry Demographics for Household Members

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

Number of days (at Entry)

In the past 7 days, how many days did youth hang out with friends who use drugs or alcohol?

Number of days (at Entry)

SECTION X.
Questions below for historical reporting ONLY:

Tenure

Subsidy

Race - Other (must specify)

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

Entry Demographics for Household Members

Household Members	DSCP Entry_SUN Community Schools	Entry Date: 06/26/2012 02:18:06 PM
<input checked="" type="checkbox"/> (28) Knope, Leslie Age: Unknown	SECTION I. Complete for ALL PARTICIPANTS	
<input checked="" type="checkbox"/> (29) Wyatt, Ben Age: Unknown	Date of Birth <input type="text"/> / <input type="text"/> / <input type="text"/>	
	Gender <input type="text" value="Male"/>	
	Race <input type="text" value="-Select-"/>	

...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.**

Service Transactions Tab

Client - Client, ServicePoint (163534)

Client: ServicePoint (163534)
Release of Information: None

Client Information | Service Transactions

Service Transaction Dashboard

- Add Need
- Add Service
- Add Multiple Services
- Add Referrals
- View Previous Service Transactions
- View Shelter Stays
- View Entire Service History

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)

Add Service

▼ Household Members

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(29) Male Single Parent

(51) Vader, Darth (Primary Client)

(59) Organa, Leia

(58) Skywalker, Luke

Service Provider* Human Solutions - SP (14)

Creating User Emily Gardner

Start Date* 02/08/2016 2:58:01 PM

End Date

Service Type* -Select-

Provider Specific Service -Select-

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)

Service Costs	
Number of Units	<input type="text"/>
Unit Type	<input type="text" value="-Select-"/>
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>

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

Client - Client, ServicePoint (163534)

Client, ServicePoint (163534)
Release of Information: Ends June 15, 2021

Client Information | Service Transactions

Needs | **Services** | Referrals | Shelter Stays | Entire Service History

Previous Services

Select Dates: -Select- Start Date: []/[]/[] End Date: []/[]/[] Search

	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

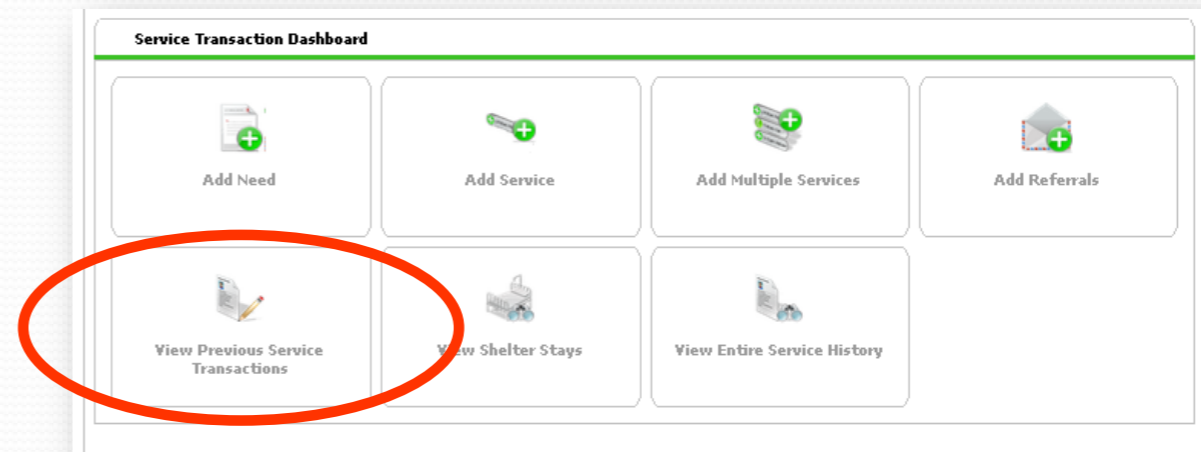
Add Service Add Multiple Services Showing 1-5 of 5

Back to Dashboard Exit

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

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.

Needs	Services	Referrals	Shelter Stays	Entire Service History	
Previous Services					
Select Dates		Start Date	End Date	Search	
-Select-					
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
Add Service		Add Multiple Services		Showing 1-5 of 5	
				Back to Dashboard	Exit

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

Interim Reviews (if applicable)!

Interim Reviews

The screenshot shows the ClientPoint software interface. At the top, there are two main tabs: 'Client Information' and 'Service Transactions'. Under 'Service Transactions', several sub-tabs are visible: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit' (which is circled in red), 'Case Managers', 'Case Plans', and 'Assessments'. Below these tabs, a message reads: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. The main content area is titled 'Entry / Exit' and contains a table with the following columns: 'Program', 'Type', 'Entry Date', 'Exit Date', 'Interims' (circled in red), 'Follow Ups', and 'Client Count'. A single row is displayed with the following data: 'NAYA: SUN Youth Advocacy (SYA) - SP (2571)', 'Basic', '10/01/2017', and an empty 'Exit Date' field. Below the table, there is an 'Add Entry / Exit' button and a status indicator 'Showing 1-1 of 1'.

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
NAYA: SUN Youth Advocacy (SYA) - SP (2571)	Basic	10/01/2017				

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.**

Interim Reviews

Edit Interim Review Data

Interim Review Data

Entry / Exit Provider	Metropolitan Family Service: SUN Youth Advocacy (SYA) - SP (2570)
Entry / Exit Type	Basic
Interim Review Type *	Annual Assessment
Review Date *	05 / 29 / 2017 4 : 01 : 15 PM

Save & Continue Cancel

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

Interim Reviews

Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider	Metropolitan Family Service: SUN Youth Advocacy (SYA) - SP (2570)
Entry / Exit Type	Basic
Interim Review Type	Annual Assessment
Review Date	05/29/2017 04:01:15 PM

Interim Review Assessment

Household Members

(1) Test, Just A
 Age: 55
Veteran: Yes (HUD)

DSCP_SSES_Spring Evaluation Interim Review Date: 05/29/2017 04:01:15 PM

SSES Case Plan Goals

	Academic Year	Attendance	Academics/Career	Self-Esteem	Prosocial Friends and Activities	Positive Behavior	Relationships with Family/Caring Adults	Basic Needs
	2016-17	Achieved Goal	Achieved Goal	Achieved Goal	Progress Made toward Goal	Progress Made toward Goal	Progress Made toward Goal	Goal Not Achieved
		Achieved Goal	Achieved Goal	Achieved Goal	Achieved Goal	Achieved Goal	Achieved Goal	Achieved Goal

Add Showing 1-2 of 2

Save Save & Exit Exit

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

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

i Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date
No matches.			

Add Entry / Exit

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

Edit Exit Data - (132) Flintstone, Fred

Household Members

To update Household members for this Exit Data, click the box beside each name.

- (58) Two Parent Family
- (132) Flintstone, Fred
- (134) Flintstone, Pebbles
- (135) Flintstone, Pebbles
- (133) Flintstone, Wilma

Edit Exit Data - (132) Flintstone, Fred

Exit Date *	<input type="text" value="07"/> / <input type="text" value="31"/> / <input type="text" value="2017"/> <input type="text" value="5"/> : <input type="text" value="14"/> : <input type="text" value="50"/> <input type="text" value="PM"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

- 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**

Exit Outcomes

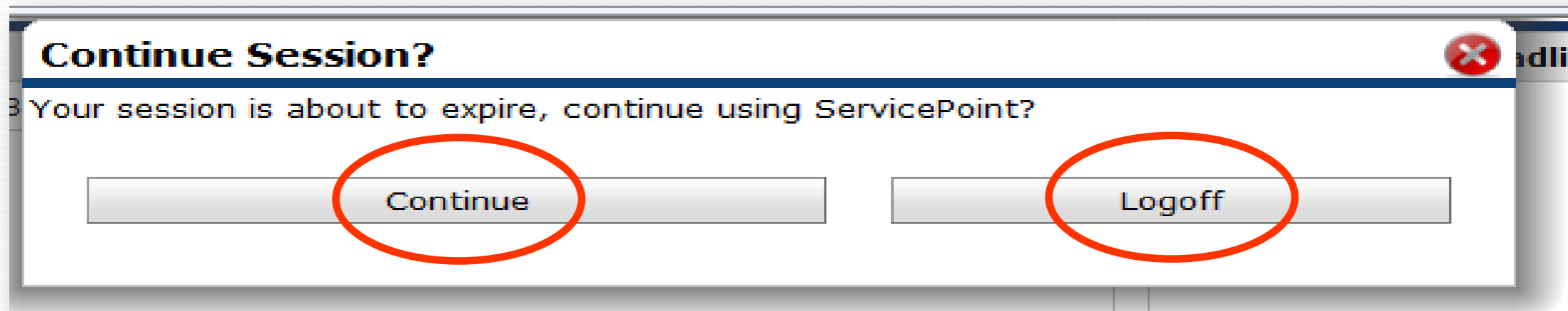
Once you click **Save & Continue**, the **Exit** section is now populated with questions.

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

Household Members	DSCP_Exit_SUNSS_Youth & Family	Exit Date: 07/31/2017 05:22:26 PM
<input checked="" type="checkbox"/> (132) Flintstone, Fred Age: Unknown Veteran: Unknown	SECTION I. Complete for ALL SCHOOL AGE YOUTH (except PCDS) Current School Status at Exit: <input type="text" value="-Select-"/>	
	SECTION II. Complete for PCDS Head of Household ONLY Client indicated program services were helpful: <input type="text" value="-Select-"/> Client indicated new skills were gained: <input type="text" value="-Select-"/> Client indicated staff was culturally sensitive: <input type="text" value="-Select-"/> Client indicated that they had knowledgeable people to talk to when they had questions about their child/children: <input type="text" value="-Select-"/>	

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

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[ServicePoint User Set-Up/Modify/Delete](#)