

Department of County Human Services
SUN Service System & Community Services

ServicePoint New User Training (Housing Programs)

A screenshot of the ServicePoint login interface. At the top left 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". To the right of the "Password" field is a "Login" button. Below the input fields, there are links for "Forgot your username or password?" and "Contact your agency administrator". A compliance notice states: "System use requires your compliance with the [terms and conditions](#)". At the bottom, it 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, service, and program outcome data for SUN Service System and Community Services programs in Multnomah County.

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.

1

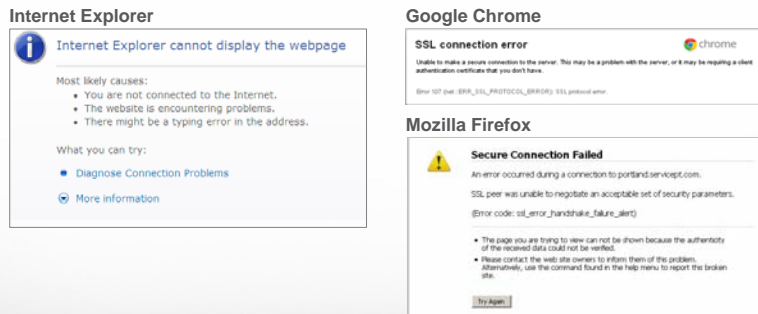
System Requirements

- **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)
- **Internet Browser**
 - Google Chrome (fastest)
 - Firefox 3+ (next fastest)
 - Internet Explorer 8

2

Security Certificate (PKI)

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



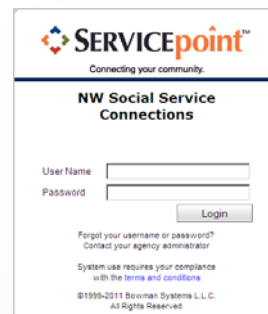
If you see one of these screens instead of **ServicePoint**, contact us, and we will send you a PKI file with instructions for installation.

3

Logging On

- Your User Name and a temporary password will be issued during this training, once you've signed a confidentiality and security agreement.
- **ServicePoint** contains sensitive client data, and all data added, edited, and deleted is 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 503-240-4408 to have your account reactivated.



4

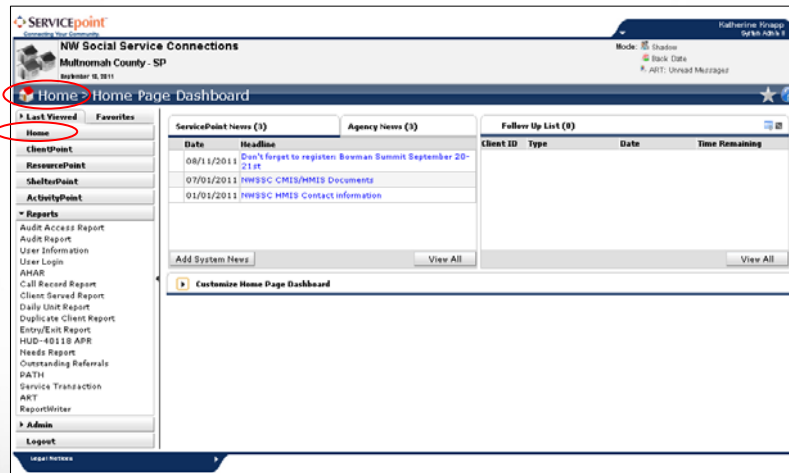
Passwords

- 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.

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

The first thing you'll see when you log in is the **Home** screen.



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

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Top Banner



- Your **Default Provider** and **Today's Date** are on the left side of the screen.
Providers in **ServicePoint** are a combination of Agency and Program (for example, Human Solutions: HUD Family Futures or IRCO: Parent Child Development Services.)
- 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.)
- Remember this grey star and where it's located...

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SERVICEpoint™ Enter Data As

Mode:  Enter Data As

Enter Data As is a feature of **ServicePoint** that allows you to enter data for multiple providers that may have different security settings behind-the-scenes.

Because data and reporting are linked to specific providers, it's important to make sure you're in the correct provider when you're entering data.

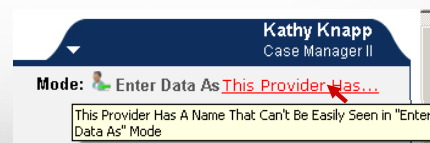
Get into the habit of checking the **Enter Data As** provider before you begin to enter a client's data, because it's very time-consuming to delete and re-enter data that was entered in the wrong provider.

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SERVICEpoint™ Changing Your Provider

1. Clicking **Enter Data As** triggers a search that displays all of the providers for which you can enter data.
2. After selecting a provider, the name is displayed next to **Enter Data As**. But the full name doesn't appear.*
3. To see the full provider, hover over the name with your cursor.

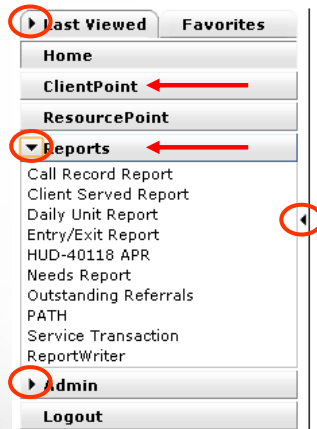
Provider Search Results					
Provider	Level	Phone	Location	Last Updated	
Multnomah County - SP (2206)	Level 2	Unknown	Unknown	07/06/2011	
Provider B (3179)	Level 5	Unknown	Unknown	07/11/2011	
Provider C (3180)	Level 5	Unknown	Unknown	07/11/2011	
This Provider Has A Name That Can't Be Easily Seen in "Enter Data As" Mode	Level 5	Unknown	Unknown	07/11/2011	



*We have requested that this be fixed, but it's not looking good...

10

SERVICEpoint[™] Module Navigation



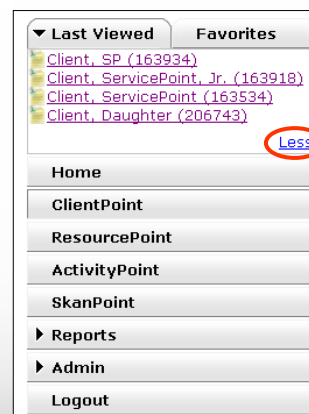
- Modules are the primary components of **ServicePoint**, and are located in a menu on the left side of the screen.
- **ClientPoint** is where all client data is entered.
- **Reports** is where all data reports are located.
- Arrows (◀) indicate areas of the menu that can be collapsed or expanded.

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SERVICEpoint[™] 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

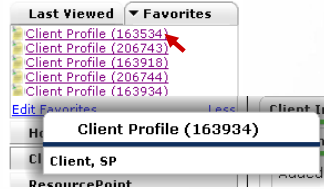


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SERVICEpoint Client Navigation

Favorites – Users can add up to **10** additional client hyperlinks from screens displaying a yellow star. 

- The silver star in the top banner changes to yellow when you're in a client record.
- Click the yellow star to add a client to your **Favorites** list.
- Hover over the hyperlink to see the client's name.
- [Edit Favorites](#) link allows users to change the order or delete **Favorites** from the list.



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Home ServicePoint and Agency News

ServicePoint News (6)

Date	Headline
08/31/2011	Welcome to 5.5 We hope you find many happy improvements
08/17/2011	New User Training for ServicePoint 5.0
08/11/2011	User Group Summit September 20-21st in Portland
07/26/2011	NWSSC P8Ps have been revised; please review
07/01/2011	NWSSC CMIS/HMIS Documents
01/01/2011	NWSSC HMIS Contact Information

Add System News View All

Agency News (3)

Date	Headline
01/13/2010	Multnomah County-SUN Service System & Community Services
06/27/2007	ServicePoint data entry forms
12/22/2006	Contact Us

Add Agency News View All

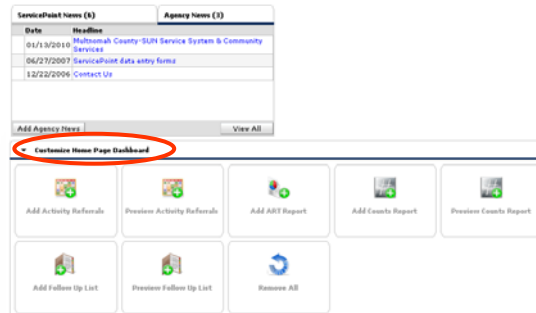
View 1: ServicePoint News

View 2: Agency News

- **ServicePoint** and **Agency News** overlap. Click the appropriate tab to view the news items.
- News subjects display as [hyperlinks](#). Click a news item to open and view it
- Edit/Delete **Agency News** items by clicking **Admin > News Admin**.

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“Customize” Your Home Dashboard



- Click the ‘x’ in **Follow Up List** to remove it from the dashboard (since it doesn’t apply to most users.)
- The other items you see when you click **Customize Home Page Dashboard** are not really functioning at this point, and Activity Referrals do not apply to SUN Schools...






Let’s look at how to
search for and create clients
in **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 (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**).
- You can also search by **Alias**, which is an optional field for a client's nickname (or street name for some providers.)




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Client Search Results

Client Results						
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned
 206743	Client, Daughter					
 163534	Client, ServicePoint		01/01/1970		Male	
 163918	Client, ServicePoint, Jr.		12/25/1995		Female	
 163934	Client, SP		01/01/1996			
 251135	Client, Test					

Showing 1-5 of 5

- Click the pencil icon on the left to view a client's record.
- Check the **ClientID**, **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
	Delete

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Adding A New Client Record

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Alias:

Social Security Number: - -

Social Security Number Data Quality: **Selected**

Exact Match:

Search ACTIVE Clients:

Search INACTIVE / DELETED Clients:

Search ALL Clients:

Search

Client Number

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

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned
No matches.						

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

Now that you've selected or created a client, you need to start entering data...

Welcome to the Client's Record!

Client - Client, ServicePoint (163534)

Client Information

Summary | Client Profile | Household | RDS | Entry / Exit | Case Manager | Case Plan | Assessments

Added to the system 07/06/2009 03:07 PM

Type	Count	Relationship	Head of Household
Female Single Parent	4	Self	Yes
Client, ServicePoint		Self	Yes
Client, ServicePoint, Jr		Daughter	No
Client, Daughter		Daughter	No
Client, Son		Son	No

Program	Type	Entry Date	Exit Date
No matches.			

Start Date	End Date	Provider
No matches.		

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

IMPORTANT Summary Instructions!

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

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

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Data Entry Order

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

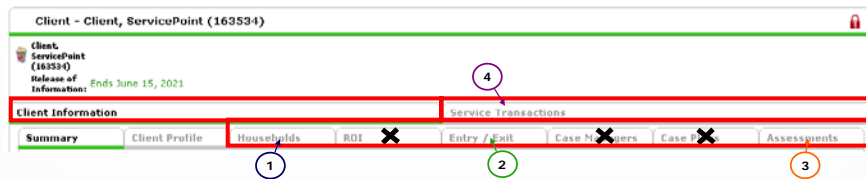
1. Households
2. Entry/Exit
3. Assessments
4. Service Transactions

If you enter data out of order, there will be problems viewing that data later. This is related to (mostly invisible) date and time stamps on each piece of data, and **ServicePoint's** not-always-logical security structure.

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Data Entry 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. Entry/Exit
3. Assessments
4. Service Transactions (above the other tabs)

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

The first tab
is called **Summary**.



Talking about it at this point would
confuse things, so it will be the last
tab we discuss today.

ClientPoint

Client Profile Tab

The image shows a screenshot of the Client Profile tab in the ClientPoint software. The 'Client Record' section is visible, showing fields for Name, Alias, Social Security, SSN Data Quality, and Age. The 'Client Demographics' section is also visible, showing fields for Date of Birth, Date of Birth Type, Gender, Race, Race - Additional, and Ethnicity (Hispanic/Latina). A red circle highlights the 'Client Demographics' section.

Client Profile contains contact information, which is not required for County programs, so using it is optional.

A small **Client Demographics** assessment (i.e. a group of related questions) is also included here. **HOWEVER...**

Client Profile Tab

Client Demographics	
Date of Birth	
Date of Birth Type	
Gender	
Race	
Race - Additional	
Ethnicity (Hispanic/Latino)	

...**DO NOT** answer these demographic questions in the **Client Profile!** Instead, answer them in the **Entry**.

If you answer these questions in the **Client Profile**, the answers will not display in the **Entry***.

*We have requested that this assessment be removed from the **Client Profile**. 27

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

Household!

Households Tab




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.
- Are members of your client's household already in **ServicePoint**? Click **Search to Add this Client to an Existing Household** to begin. (WARNING: This search only looks for Heads of Household (the Primary Client for Youth programs.)
- Is the client new to your agency and/or **ServicePoint**? Click **Start New Household** to begin.

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Start New Household

Household	
Add a New Household - (Client, ServicePoint)	
Household Type*	Female Single Parent
Head of Household	Yes
Relationship to Head of Household	Self
Date Entered*	06/15/2011
Date Removed	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

- Household Type** should only be 'Single Individual' if your client lives alone.
- Head of Household** is your Primary Client.
- Relationship** is to the Head of Household.
- Date Entered** should be changed to your client's Entry Date (Intake Date.)
- Date Removed** is only used when a client permanently leaves a household.

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Add Family Members to Household

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**.

The screenshot shows the 'Edit Household' window with the 'Client Search' section. The 'Add New Client With This Information' button is circled in red. Below the search fields, there is a 'Client Results' table with one entry:

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Married
43918	Client, ServicePoint, Jr.		12/25/1995		Female	

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Add Family Members to Household

4. Answer the questions in **Add New Household Member**, and click **Save**. (Change **Date Entered** to the **Entry Date**.)
5. The second client is then added to the household.
6. The red minus symbol is for removing clients from the household.
7. Repeat until all family members have been added to the household, and then click **Exit** at the bottom of the screen.

The screenshot shows the 'Add New Household Member' dialog box. The 'Save' button is circled in red. The dialog contains the following information:

- Client: Client, ServicePoint, Jr. (163918)
- Head of Household: No
- Relationship to Head of Household: Son
- Date Entered: 08/15/2011
- Date Removed: [Empty]

The screenshot shows the 'Edit Household' window with the 'Household Overview' table. The second client is circled in red:

ID	Name	Relationship	Date Entered	Date Removed	Head of Household
163934	Client, ServicePoint	Self	08/15/2011		Yes
163918	Client, ServicePoint, Jr.	Son	08/15/2011		No

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

Entry/Exit!

ClientPoint

Entry/Exit Tab

Program	Type	Entry Date	Exit Date
Add Entry / Exit			

No matches.

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.

ClientPoint Entry

- Click the **Check All Household Members** button to quickly include the client's family in the **Entry/Exit**, if appropriate.
- The **Entry Date** defaults to today's date – **always change it to the date the client entered the program!**
- **Type** is discussed in the next slide...

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ClientPoint (Entry) Type

- The **Entry Type** for all County youth programs in **ServicePoint** is "Basic".
- If you save the wrong **Type** for your program, no Entry demographics will display (and then you'll be hearing from us about all your missing data...)
- Demographic questions will appear after you click **Save & Continue**.

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Entry Demographics

After selecting the correct **Type**, and clicking **Save & Continue**, the **Entry Demographics** section will populate with the questions for your program.

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Entry Demographics

- Answers to some questions may prefill if your client is not new to **ServicePoint** – be sure to update them as appropriate.
- All Entries and Exits are divided into sections identified as **Section I.**, **Section II.**, etc.
- Blue headers** specify which clients in which programs must have answers in each section.
- All clients must have answers to questions in **Section I.**, regardless of program.
- All questions in **RED** are required for those clients/programs. **Black** questions are optional.

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Entry Demographics for Household Members

Entry demographics (as well as Exit outcomes) must be completed for all members of households included in the **Entry/Exit**.

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

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Entry Demographics for Household Members

2. Select the **Entry/Exit** tab again -- you will still be in the first client's record. Click the pencil next to the appropriate **Entry Date**.

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Entry Demographics for Household Members

Entry / Exit - Client, ServicePoint (163534)

Household Members Associated with this Entry / Exit					
Name	Head of Household	Entry Date	Exit Date	Reason for Leaving	Destination
Client, ServicePoint, Jr.	No	06/15/2011			
Client, SP	No	06/15/2011			
Client, Daughter	No	06/15/2011			

Showing 1-3 of 3

Entry Data

Note: If you change the provider selected it may cause the Entry Assessment to adjust for the new Provider's Entry 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) Search My Provider Clear Submit

Type* Basic Submit

Entry Date* 06/15/2011

- In the first client's **Entry/Exit** screen, click the pencil next to a household member's **Entry Date**. Their **Entry** screen will open, and the demographic questions can be answered.

You can continue selecting the remaining household members from their respective **Entry/Exit** screens.

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Exit and Exit Outcomes

- To exit a client or household, just click the pencil next to **Exit Date** in the Entry, and the Exit screen will display
- If the **Exit Date**, **Reason for Leaving**, and **Destination** apply to everyone in the household, you can check them all and the answers will be applied to them.
- The remaining part of the Exit is divided into sections just like the Entry, but only applies to the client at the top of the screen.
- To answer these questions for other household members, you need to click the pencil next to their **Exit Date**.

Entry / Exit - Client, ServicePoint (163534)

Household Members Associated with this Entry / Exit					
Name	Head of Household	Entry Date	Exit Date	Reason for Leaving	Destination
Client, ServicePoint, Jr.	No	06/15/2011			
Client, SP	No	06/15/2011			
Client, Daughter	No	06/15/2011			

Showing 1-3 of 3

Exit Data

Exit Date* 07/05/2011

Reason for Leaving* Select

Destination* Select

Notes

Household Members

To update Household Members' Exit data, click on the box beside each name.

Household #1 Members: Check All Household Members Clear All

Client, SP

Client, ServicePoint, Jr.

Client, Daughter

DSCP Exit_SPH Service System Exit Assessment

SECTION 1 Complete this section for Adults ONLY

Employment Status at Exit Full-Time Employment

Income received from any source in past 30 days? (No INK)

Remember to click **Save** at the bottom of the screen when you're done!

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

Assessments, if applicable!

ClientPoint

Assessments Tab

The screenshot shows the ClientPoint web interface for a client named 'Client, ServicePoint (163534)'. The 'Assessments' tab is selected in the navigation bar. A 'Select an Assessment' dropdown menu is open, showing several options: 'DSCP 3, 6, 9, and 12-Month Follow-Up', 'DSCP 3, 6, 9, and 12-Month Follow-Up', 'DSCP_Addon for Prosperity Matrix', 'DSCP_HYC Assessment and Assertive Engagement', and 'DSCP Homeless Youth Follow-Up (6- and 12-Month)'. The first option is selected. A red box highlights the dropdown menu and the 'Submit' button next to it.

Some housing programs have assessments that require clicking the **Assessments** tab to answer additional project-specific questions.

1. To see a particular set of questions, select the appropriate assessment from the drop-down menu, and click **Submit**.

Assessments Tab

Client - Client, ServicePoint (165534)

Release of Information: Ends 06/15/2021

Client Information | Service Transactions

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

Select an Assessment

DSCP 3, 6, 9, and 12-Month Follow-Up

Follow-up required 3, 6, 9, and 12 months after Exit

Housing Outcomes (July 2006 forward)

Housing Outcome Intervention Program Type	Reporting Placement/Eviction Prevention Date	Initial Placement/Eviction Prevention Date	End of Subsidy Date	Follow Up Interval	Follow Up Due Date	Actual Follow Up Date	Is Client Still in Housing?	End Date
Permanent Placement	Permanent Housing	02/02/2011	03/31/2011	6-Months	09/30/2011			
Permanent Placement	Permanent Housing	02/02/2011	03/31/2011	3-Months	05/31/2011	05/31/2011	Yes (HUD)	

Add

Showing 1 - 2 of 2

- Clicking **Submit** refreshes the screen to display the questions for the selected assessment.
- Click **Add** to answer the questions, and click **Save** before going somewhere else in **ClientPoint**.

45

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

Service Transactions!

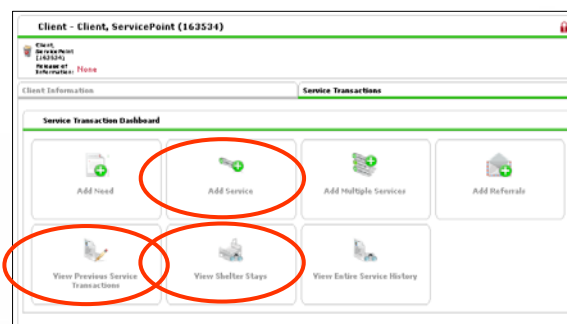
Service Transactions

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 your supervisor to find out how you should do it for your program.

Service Transactions Tab



The only button in the **Service Transaction Dashboard** that you should use for entering data is **Add Service**.

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

Add Service (Top)

- Select any members of the client's household who benefited from this service in the **Household Members** section.
- **Start Date** is the date services were provided (or the last day of the month for cumulative services.).
- **Service Type** is also called the **Need**, and it's always "Basic Needs" for County programs (City programs have a longer list.)
- **Provider Specific Service** is the actual service provided (Case Management, etc.)

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Add Service (Bottom)

- **Number of Units** and **Unit Type** are in a section called Service Cost (we don't know why...)
- **Service Staff** is currently missing altogether, but we hope it's added soon. For now, use **Service Notes** to enter the name of the case manager who provided the service.
- Click **Save & Exit** to save the service.

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Add Another Service

Client - Client, ServicePoint (163534)

Client Information **Service Transactions**

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

Previous Services

Select Dates 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

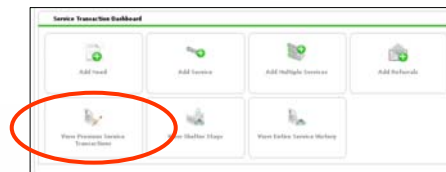
Add Service Add Multiple Services Showing 1-5 of 5 **Back to Dashboard** Exit

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

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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

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

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Summary Tab

The **Summary** tab displays a dashboard of easily-viewed data whenever you visit a client's record.

Client Information

Summary | Client Profile | Household | Exit | Entry / Exit | Case Managers | Case Plans | Activities | Assessments

Added to the system 07/06/2009 03:07 PM

Name: ServicePoint Client | Gender: Male
 Date of Birth: 01/01/1970 | Primary Race: American Indian or Alaska Native (AI/AN)
 Social Security: | Secondary Race:

Household				Entry/Exit			
Type	Count	Relationship	Head of Household	Program	Type	Entry Date	Exit Date
Female Single Parent	1						
Client, ServicePoint		Self	Yes	Add Entry / Exit			No matches.
Client, ServicePoint, Jr.		Daughter	No				
Client, Daughter		Daughter	No				
Client, Son		Son	No				

Add Client to Existing Household | Start New Household

Start Date	End Date	Provider
Add Service		No matches.

****IMPORTANT Summary Instructions****

FOUR Steps to Enrolling a Client/Household:

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

You can also create **Households**, **Entry/Exits**, and **Services** from this dashboard. HOWEVER...

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Summary Tab

When enrolling clients/households using the Summary dashboard, you MUST follow the correct step-by-step order for your program! (The steps are conveniently displayed below the dashboard.)

****IMPORTANT Summary Instructions****

FOUR Steps to Enrolling a Client/Household:

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

The dashboard creates the illusion that it's okay to enter data in any order. If you don't follow the steps, you will have problems later!

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Now let's look at
ShelterPoint,
which is used for tracking
housing nights...

(Shelter stays can also be added
to the **Summary Tab**.)

ShelterPoint

ShelterPoint Module

ShelterPoint is where bednights are collected for individuals and families.

Every County program that provides emergency shelter or transitional housing actually has two providers in **ServicePoint**: a “main provider” where demographics, non-housing services, and exit outcomes are collected, and a **ShelterPoint** provider where ONLY bednights are recorded.

Individuals and families MUST have an Entry entered in the main provider before bednights are entered in the ShelterPoint provider! If a client doesn't appear in the **ShelterPoint** search results, you need to wait until the main provider Entry has been completed before entering the bednights.

ShelterPoint Module

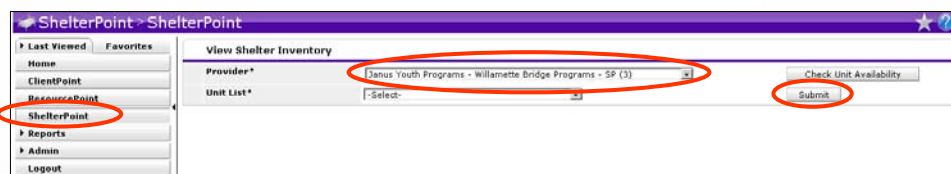


Before clicking the **ShelterPoint** module, remember to change your **Enter Data As** provider to the shelter provider you will be working in.

Not doing this step will enroll the client in the wrong provider, and cause problems later for reporting.

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ShelterPoint Module



When you click **ShelterPoint**, the Provider should default to your parent provider for most users, and you must then change it to your **Enter Data As** provider and click **Submit** to see the appropriate bedlists.*

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ShelterPoint Module

The screenshot shows a web browser window titled 'ShelterPoint > ShelterPoint'. On the left is a navigation menu with items: Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, and Logout. The main content area is titled 'View Shelter Inventory'. It contains a form with the following fields and buttons:

- Provider***: Human Solutions - SP (14)
- Search**: A button circled in red.
- By Provider**: A button.
- Clear**: A button.
- Check Unit Availability**: A button.
- Unit List***: A dropdown menu currently showing '-Select-'.
- Submit**: A button.

However, we suspect that eventually everyone will see [this](#) screen after clicking **ShelterPoint** – here, you will have to click the **Search** button to find your **Enter Data As** provider.*

*It's also possible that there will be a [third](#) version in which the Provider defaults to your EDA provider, but we just don't know yet...

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ShelterPoint Module

The screenshot shows the 'ShelterPoint Dashboard' after the 'Submit' button was clicked. The 'Provider' field is now 'Texas Youth Programs FORCHLONH (Enter Shelter) - SP (2048)' and the 'Unit List' dropdown is set to 'Cruz Shelter'. The 'Submit' button is circled in red. The dashboard consists of eight tiles:

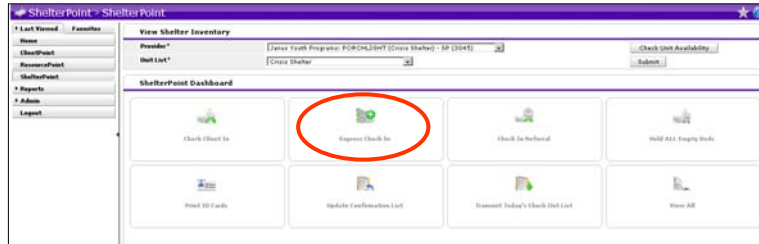
- Check Check In
- Express Check In
- Check In Referral
- Hold All Empty Beds
- Print ID Cards
- Update Confirmation List
- Transmitt Today's Check Out List
- View All

After you select your shelter Provider and click **Submit**, the **Unit List** and **ShelterPoint** dashboard will display.

(If your provider has multiple bedlists, you'll need to also select the correct list from the **Unit List** drop-down before the dashboard displays.)

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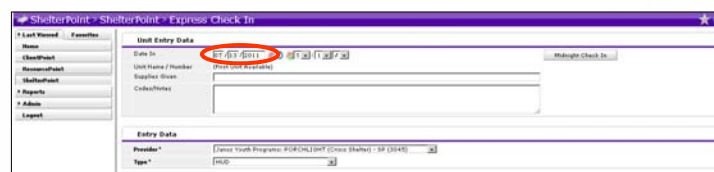
ShelterPoint Dashboard



To quickly check in individuals and families, click **Express Check-In** in the **ShelterPoint** dashboard...

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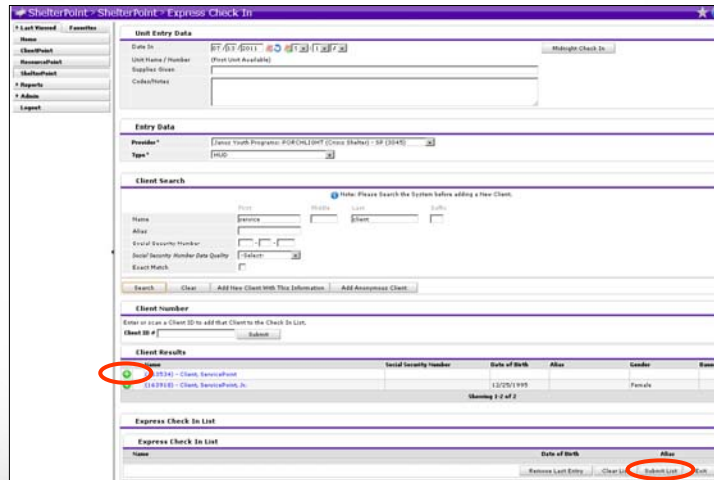
Express Check-In



1. To check in a client, just enter the correct **Date In** for the start of the shelter stay.

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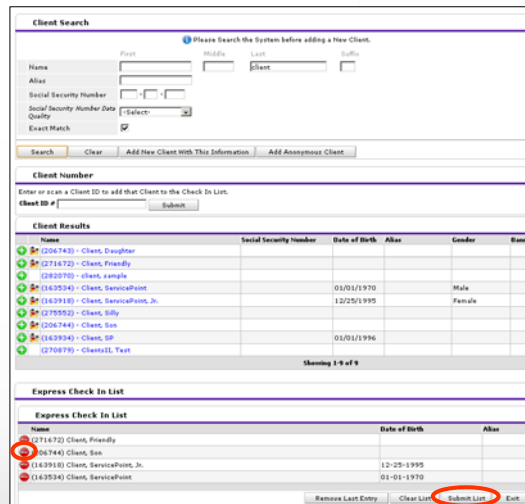
Express Check-In



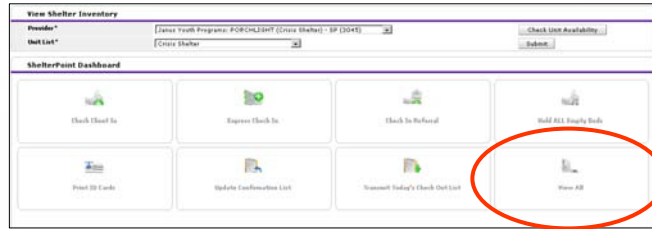
- Then search for the client and click the green plus sign next to their name to add them to the list.

Express Check-In

- If multiple clients have the same shelter **Date In**, you can continue searching for those clients and adding them to the **Express Check In List** at the bottom of the screen.
- When the list is complete, click **Submit** to check all the clients in to the bedlist for that date.
- To remove a client from the **Express Check In List**, click the red minus sign icon.



Express Check-In



3. You are returned to the **ShelterPoint** dashboard. Click **View All** to see the client in the shelter list.

Shelter Inventory Information

Unit List - Crisis Shelter

Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
---	---	Bed 01		(143534) Client, ServicePoint				No	
---	---	Bed 02		(143924) Client, SP				No	
---	---	Bed 03	Hold	EMPTY					
---	---	Bed 04	Hold	EMPTY					
---	---	Bed 05	Hold	EMPTY					

Express Check-Out > Individuals

Shelter Inventory Information

Unit List - Crisis Shelter

Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
---	---	Bed 01		(143534) Client, ServicePoint				No	
---	---	Bed 02		(143924) Client, SP				No	
---	---	Bed 03	Hold	EMPTY					
---	---	Bed 04	Hold	EMPTY					
---	---	Bed 05	Hold	EMPTY					

1. In the shelter list, click the bed icon with the red minus sign:



Express Check-Out > Individuals

ShelterPoint - ShelterPoint - Check Out

Unit Exit Data - (162534) Client, ServicePoint

Date Out* 07/15/2011

Unit Name / Number B22 01

Supplies Returned

Funding Sources

Source No matches.

Reason for Leaving Dropped/Disappeared

Destination Don't Know (H23)

Household Members

No Household Members were originally associated.

Save Save & Exit Exit

2. Enter the correct **Date Out**, make sure you've answered **Reason for Leaving** and **Destination** correctly, and then click **Save & Exit**. The client is checked out!

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Express Check-Out > Groups

View Shelter Inventory

Provider* James Youth Programs: FORDCLIGHT (Crisis Shelter) - SF (044)

Unit List* [Clear State] [Submit]

Check Unit Availability

ShelterPoint Dashboard

Check Check In

Express Check In

Check In Workflow

Hold All Empty Beds

Print ID Cards

Update Confirmation List

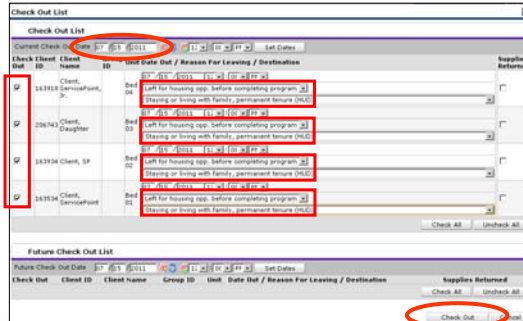
Transmit Today's Check Out List

View All

1. In the **ShelterPoint** dashboard, click **Transmit Today's Check Out List**.

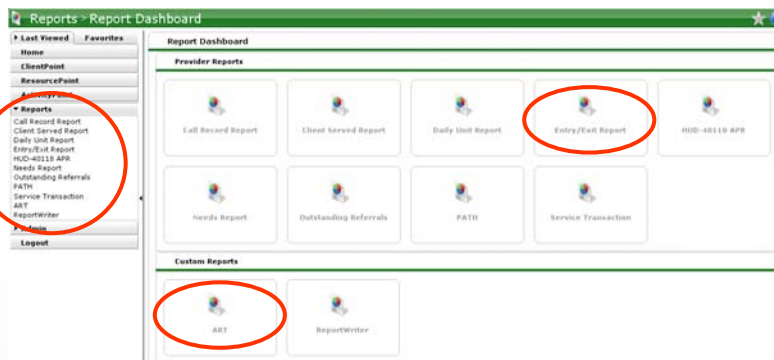
68

Express Check-Out > Groups



2. Change the **Current Check Out Date**, select the clients checking out, make sure you've answered **Reason for Leaving** and **Destination** correctly, and then click **Check Out**.

Reports Dashboard



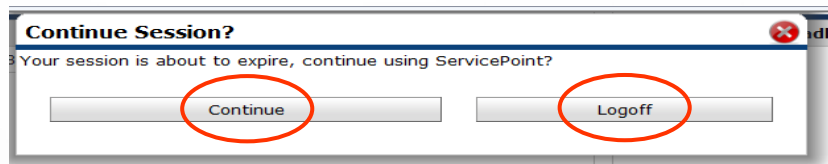
Reports are located in a dashboard of buttons representing different canned reports, as well as the custom reporting tool, ART (which requires a separate training and license.)

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.

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

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The End!