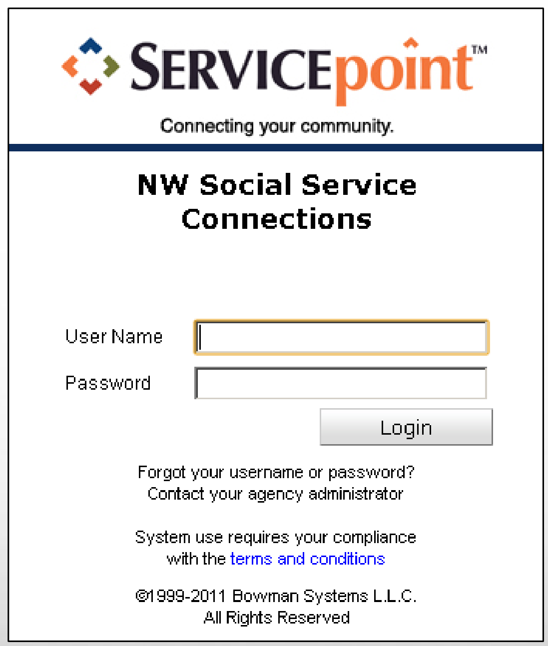
MULTNOMAH COUNTY OREGON

Department of County Human Services
SUN Service System & Community Services

ServicePoint New User Training

(Housing Programs)



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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.

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

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:

Internet Explorer

Google Chrome

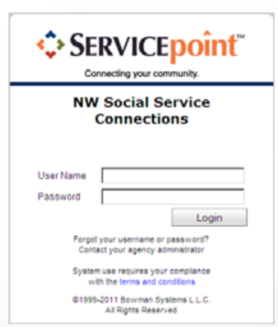
Mozilla Firefox

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

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.

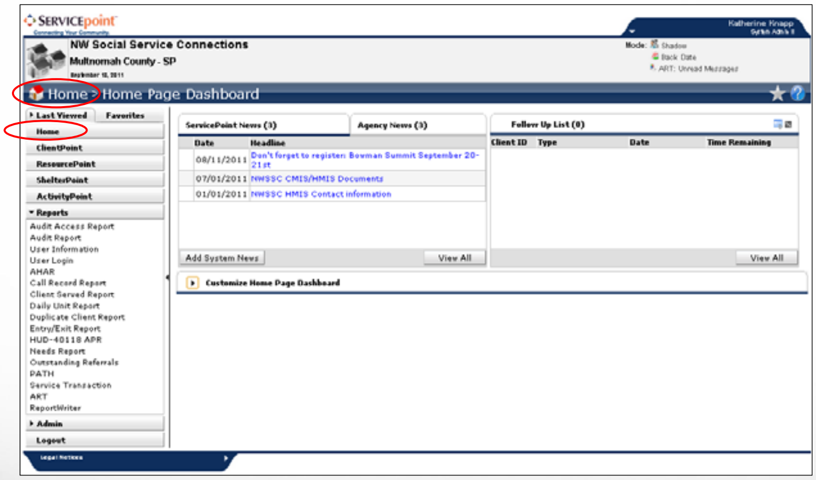


Passwords

- 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.

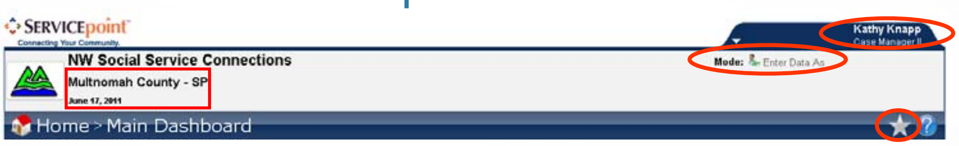
Let’s start looking at **ServicePoint**!

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….

Top Banner



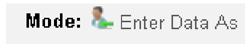
- Your **Default Provider** and **Today's Date** are on the left side of the screen.

  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…

SERVICEpoint

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 <u>it's very time-consuming to delete and re-enter data that was entered in the wrong provider</u>.

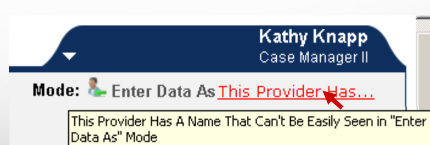
SERVICEpoint

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.*

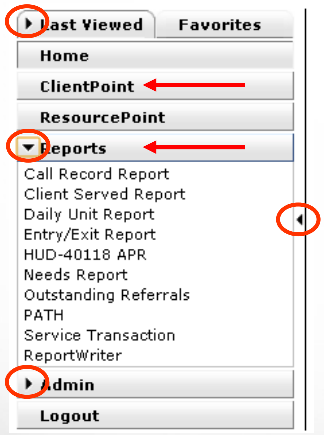
3. To see the full provider, hover over the name with your cursor.



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

SERVICEpoint

Module Navigation



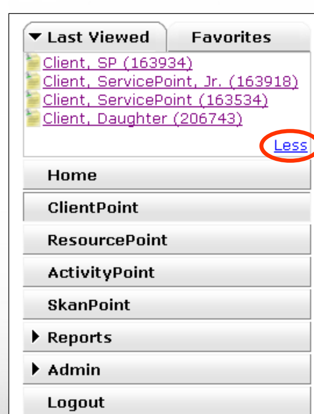
- Modules are the primary components of **ServicePoint**, and are located in a menu on the left side of the screen.
- **ClientPoint** is where all client data is entered.
- **Reports** is where all data reports are located.
- Arrows (◀) indicate areas of the menu that can be collapsed or expanded.

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

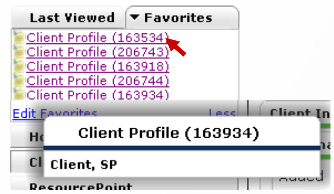


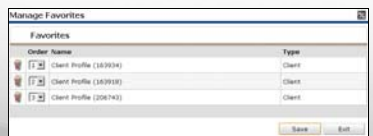
SERVICEpoint

Client Navigation

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

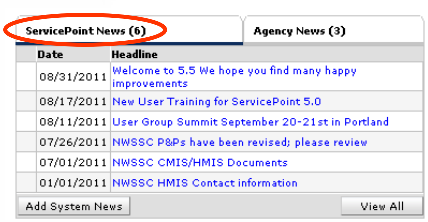
- The silver star in the top banner changes to yellow when you're in a client record.
- Click the yellow star to add a client to your **Favorites** list.
- Hover over the hyperlink to see the client's name.
- Edit Favorites link allows users to change the order or delete **Favorites** from the list.



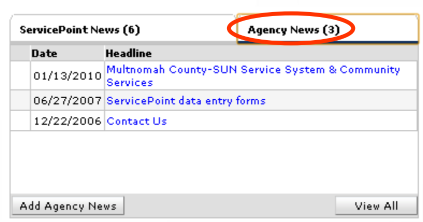


Home

ServicePoint and Agency News



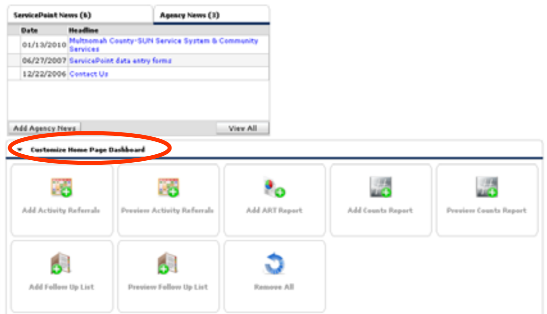
View 1: ServicePoint News



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**.

“Customize” Your Home Dashboard

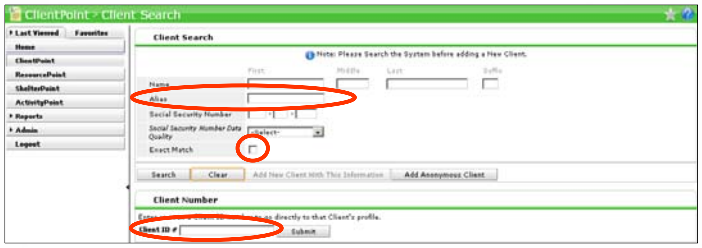


- Click the **‘x’** in **Follow Up List** to remove it from the dashboard (since it doesn’t apply to most users.)
- The other items you see when you click **Customize Home Page Dashboard** are not really functioning at this point, and Activity Referrals do not apply to SUN Schools…

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

ClientPoint

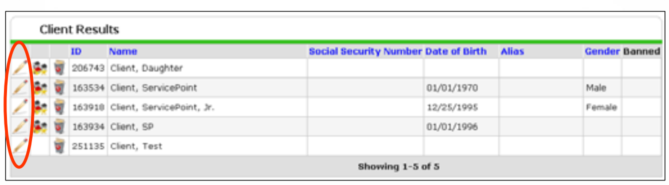
Searching for Clients



- 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.)

ClientPoint

Client Search Results

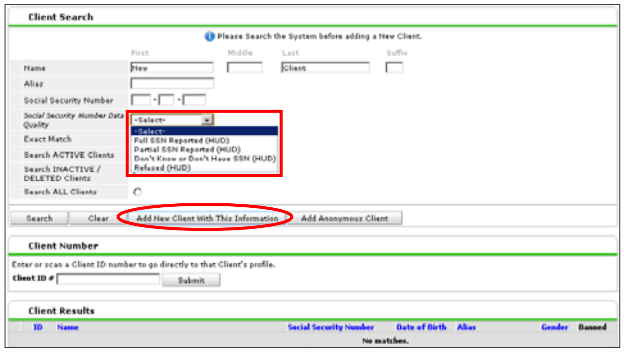


- Click the pencil icon on the left to view a client's record.
- Check the **ClientID**, **Date of Birth**, and **Gender** to be sure you're selecting the correct client!

What the Icons Mean	
	Edit or View
	Client created by current provider
	Delete

ClientPoint

Adding A New Client Record

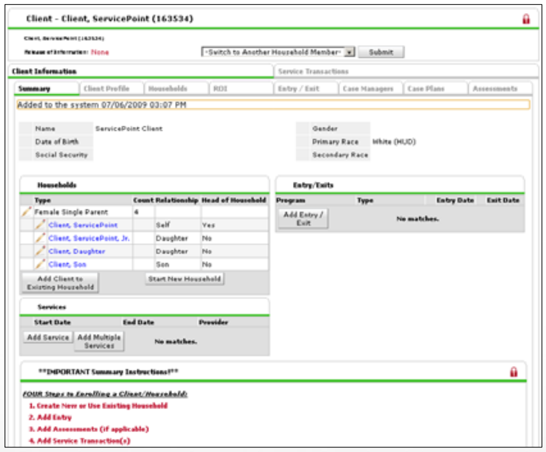


If the client you're looking for doesn't appear in the search results, just complete the full **First** and **Last Name**, answer the **Social Security Number Data Quality** question, and click **Add Client With This Information**.

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

ClientPoint

Welcome to the Client's Record!



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…

ClientPoint

Data Entry Order

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

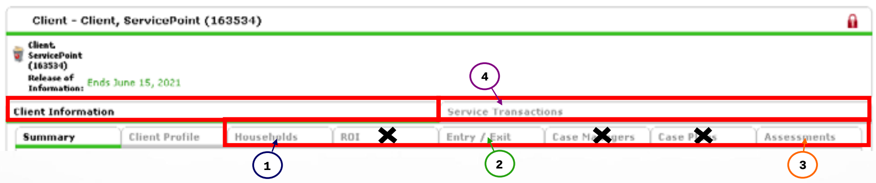
1. Households
2. Entry/Exit
3. Assessments
4. Service Transactions

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.

ClientPoint

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)

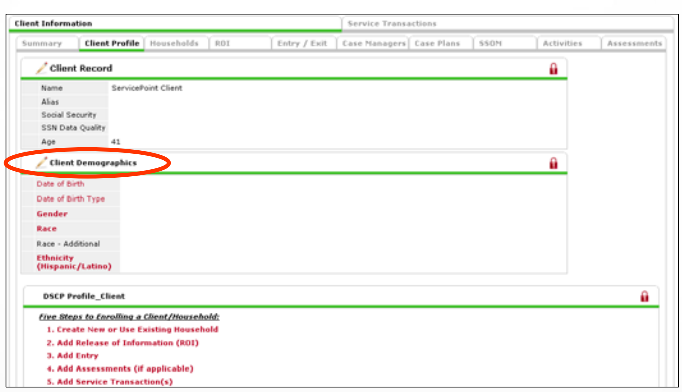
Now we'll look at each tab under **Client Information**…

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

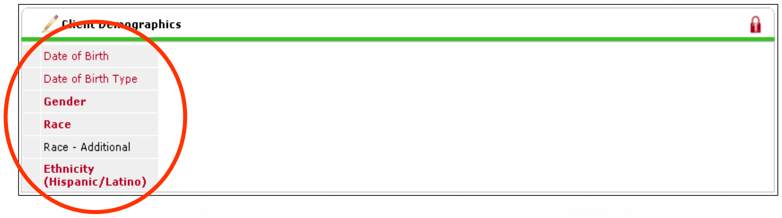


Client Profile contains contact information, which is not required for County programs, so using it is optional.

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

ClientPoint

Client Profile Tab



…**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**, <u>the answers will not display in the **Entry**</u>*.

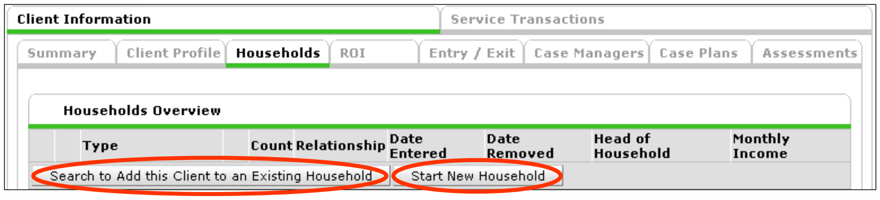
*We have requested that this assessment be removed from the **Client Profile**.

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

Household!

ClientPoint

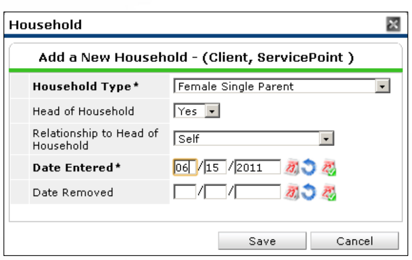
Households Tab



- You must create a household for <u>all</u> clients, even if they live alone, or family member information cannot be obtained.
- 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.

ClientPoint

Start New Household



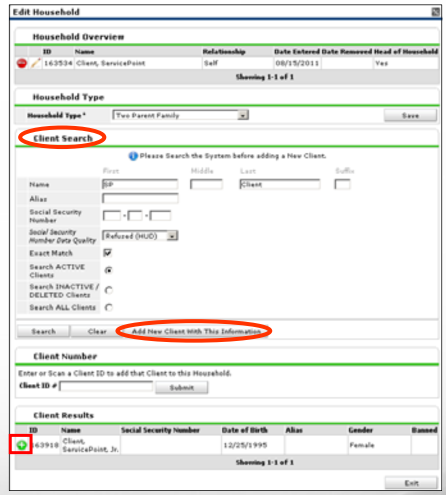
Date Icons	
	Select date from calendar
	Clear date fields
	Insert today's date

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

ClientPoint

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**.

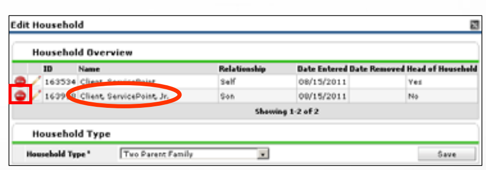


ClientPoint

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.



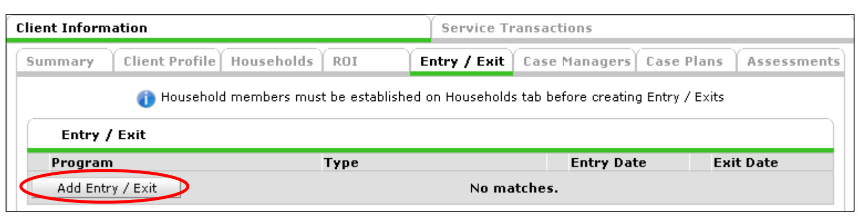
6. The red minus symbol is for removing clients from the household.
7. Repeat until all family members have been added to the household, and then click **Exit** at the bottom of the screen.

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

Entry/Exit!

ClientPoint

Entry/Exit Tab



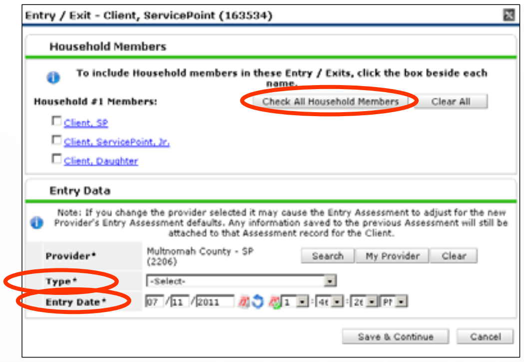
Anyone who will be receiving direct services from a case manager MUST have an **Entry/Exit** in **ServicePoint**.

<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.

ClientPoint

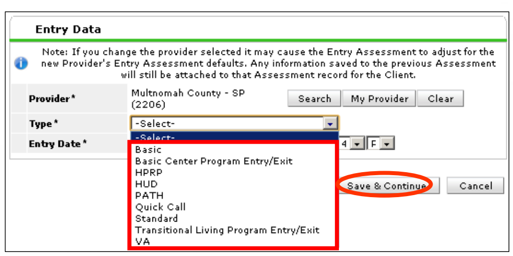
Entry



- 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…

ClientPoint

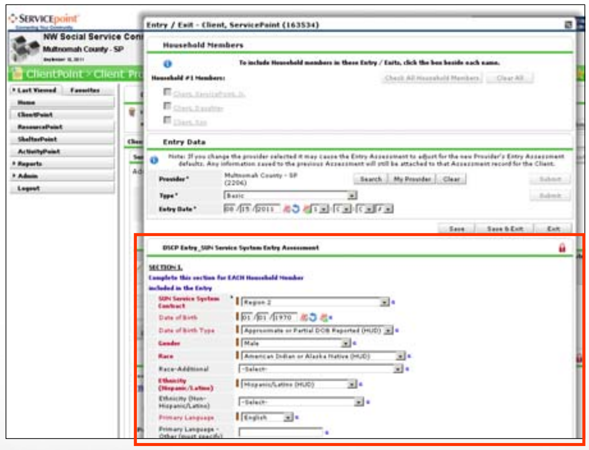
(Entry) Type



- 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**.

ClientPoint

Entry Demographics

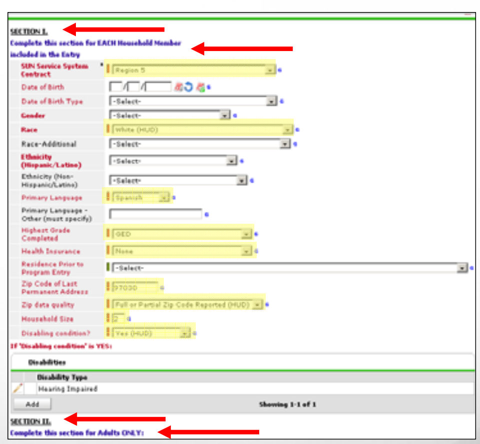


After selecting the correct **Type**, and clicking **Save & Continue**, the **Entry Demographics** section will populate with the questions for your program.

ClientPoint

Entry Demographics

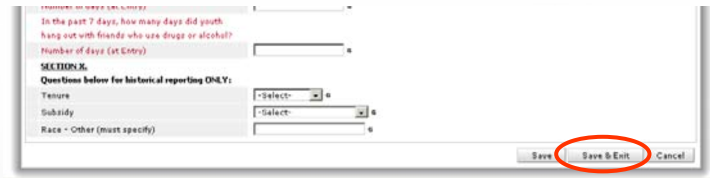
- Answers to some questions may prefill if your client is not new to **ServicePoint** – be sure to update them as appropriate.
- All Entries and Exits are divided into sections identified as **Section I.**, **Section II.**, etc.
- **Blue headers** specify which clients in which programs must have answers 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.



ClientPoint

Entry Demographics for Household Members

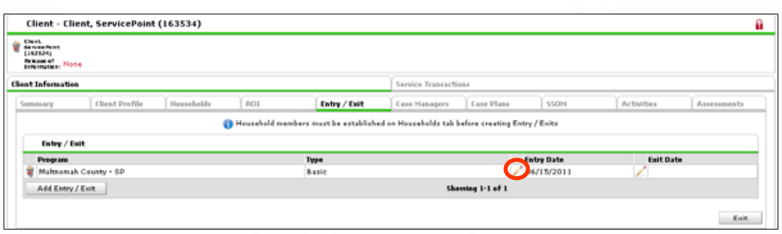
Entry demographics (as well as Exit outcomes) must be completed for all members of households included in the **Entry/Exit**.



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

ClientPoint

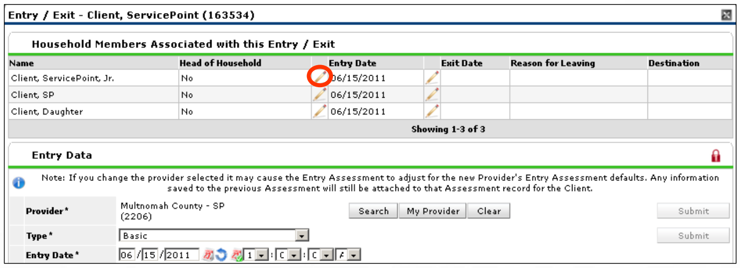
Entry Demographics for Household Members



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**.

ClientPoint

Entry Demographics for Household Members



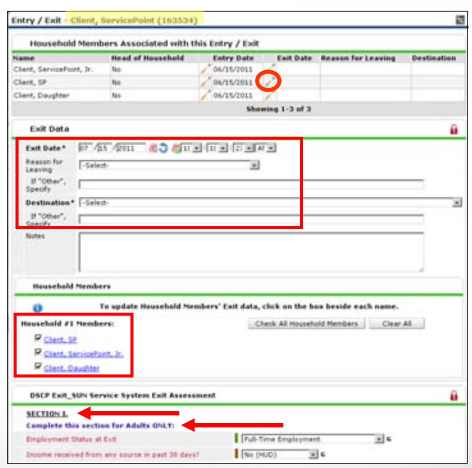
3. In the first client's **Entry/Exit** screen, click the pencil next to a household member's **Entry Date**. Their **Entry** screen will open, and the demographic questions can be answered.

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

ClientPoint

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**.



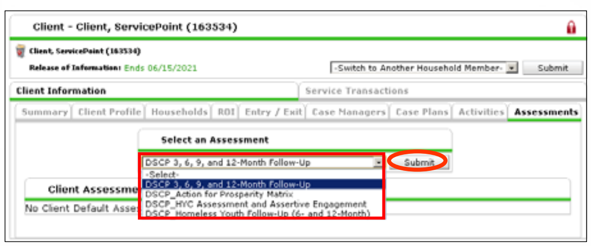
Remember to click **Save** at the bottom of the screen when you're done!

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

Assessments, if applicable!

ClientPoint

Assessments Tab

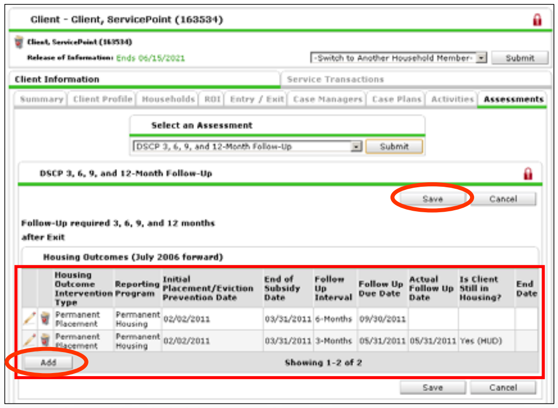


Some housing programs have assessments that require clicking the **Assessments** tab to answer additional project-specific questions.

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

ClientPoint

Assessments Tab



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

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

Service Transactions!

ClientPoint

Service Transactions

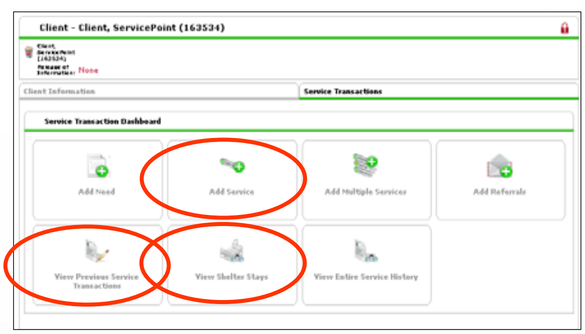
Service Transactions is where you will record various services provided to an individual client or household at regular intervals.

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.

ClientPoint

Service Transactions Tab

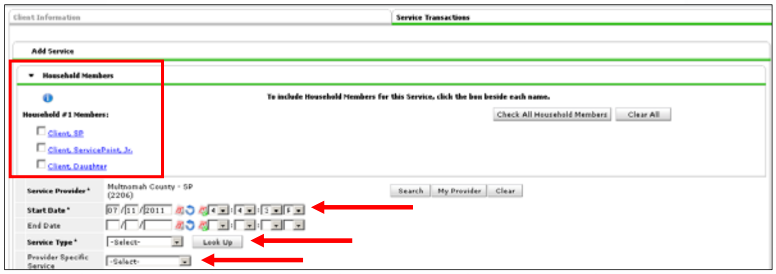


The only button in the **Service Transaction Dashboard** that you should use for entering data is **Add Service**.

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

ClientPoint

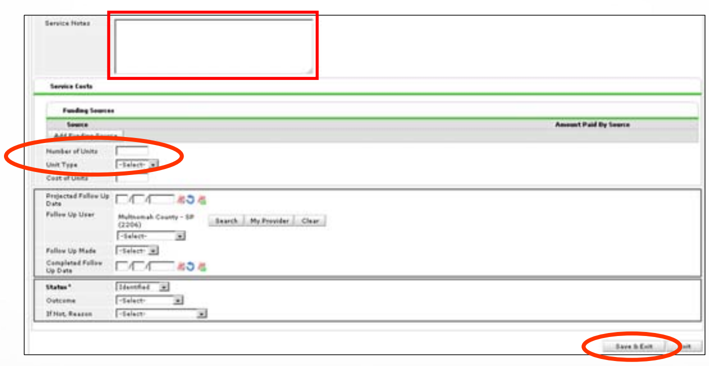
Add Service (Top)



- 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.)

ClientPoint

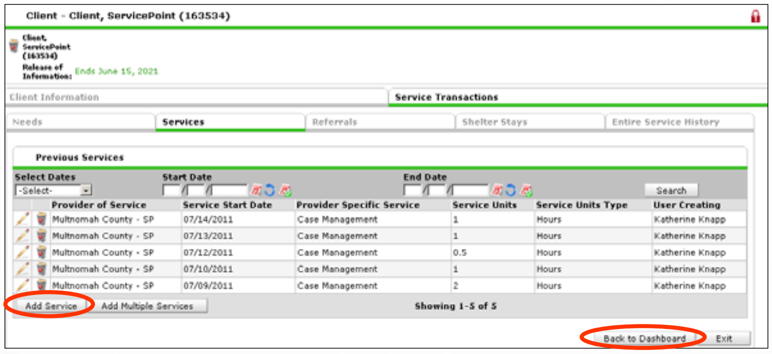
Add Service (Bottom)



- **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.

ClientPoint

Add Another Service

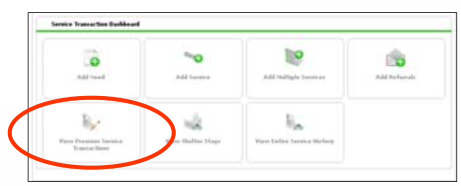


- To add another service, click **Add Service.**
- To return to the **Service Transactions Dashboard**, click **Back to Dashboard**.

ClientPoint

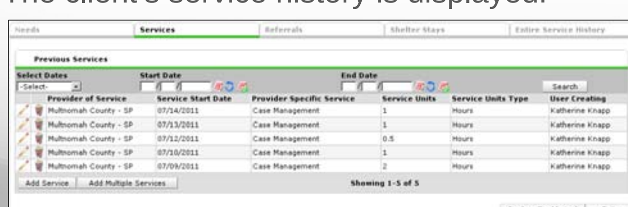
View Services

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



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

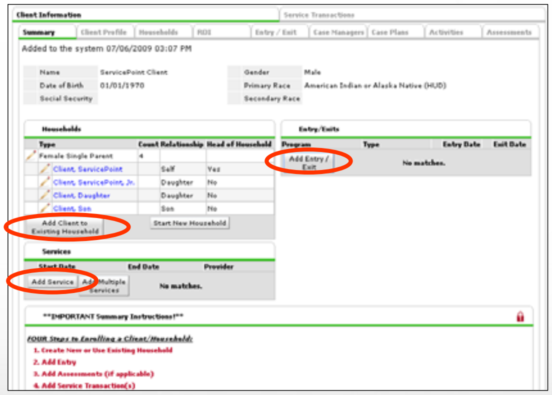
3. The client's service history is displayed.



ClientPoint

Summary Tab

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



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

ClientPoint

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. <u>If you don't follow the steps, you will have problems later</u>!

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 <u>before</u> 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

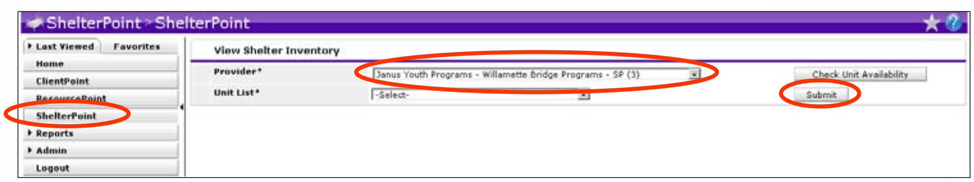
ShelterPoint Module

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.

ShelterPoint

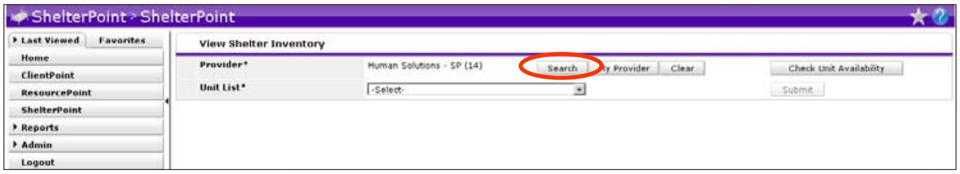
ShelterPoint Module



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.*

ShelterPoint

ShelterPoint Module

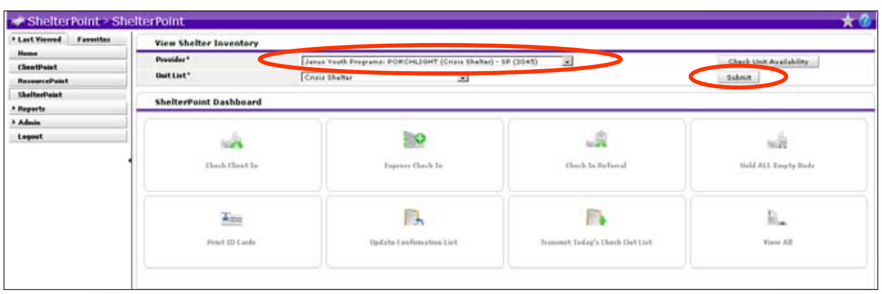


However, we suspect that eventually everyone will see <u>this</u> screen after clicking **ShelterPoint** – here, you will have to click the **Search** button to find your **Enter Data As** provider.*

*It's also possible that there will be a <u>third</u> version in which the Provider defaults to your EDA provider, but we just don't know yet…

ShelterPoint

ShelterPoint Module

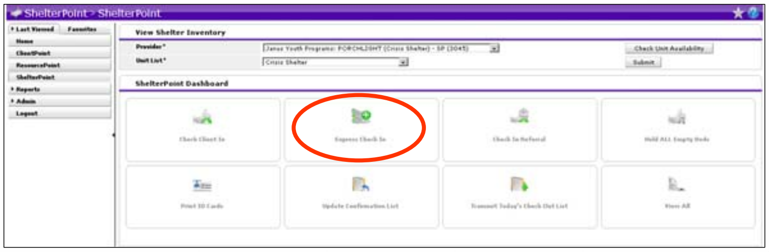


After you select your shelter Provider and click **Submit**, the **Unit List** and **ShelterPoint** dashboard will display.

(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.)

ShelterPoint

ShelterPoint Dashboard



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

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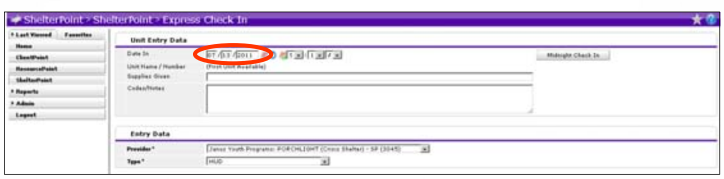
ShelterPoint

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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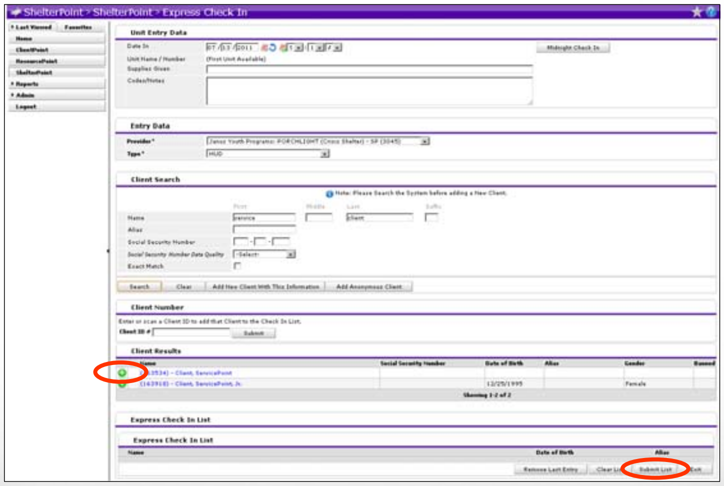
ShelterPoint

Express Check-In

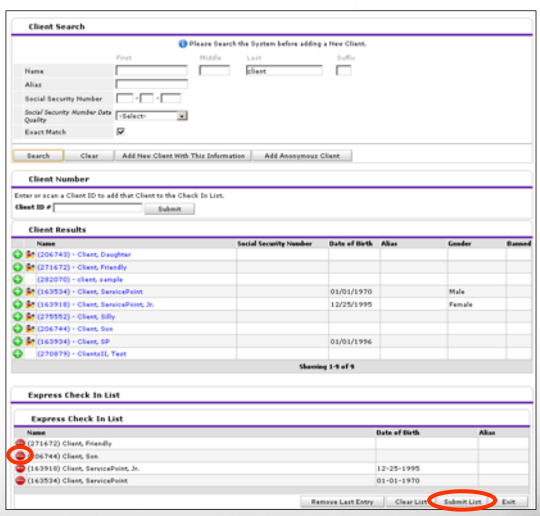


2. Then search for the client and click the green plus sign next to their name to add them to the list.

ShelterPoint

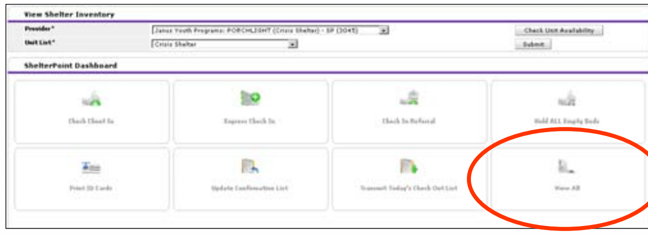
Express Check-In

- 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.

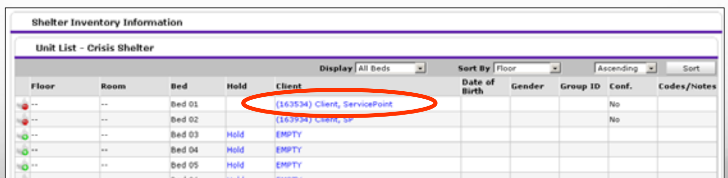


ShelterPoint

Express Check-In

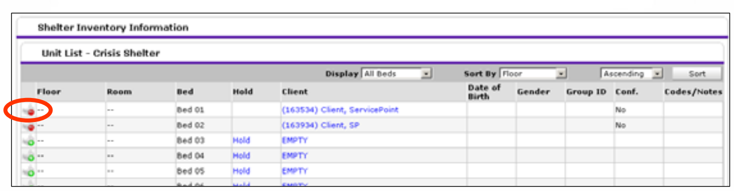


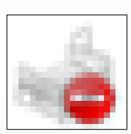
3. You are returned to the **ShelterPoint** dashboard. Click **View All** to see the client in the shelter list.



ShelterPoint

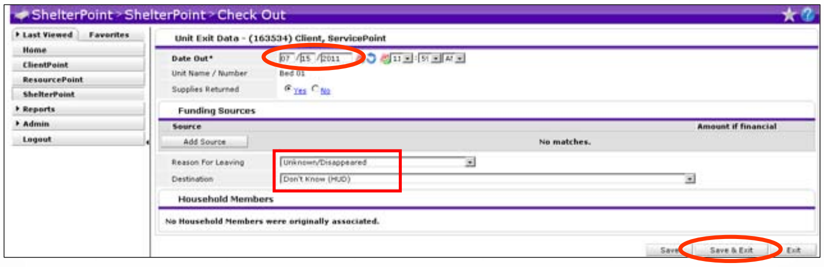
Express Check-Out > Individuals



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

ShelterPoint

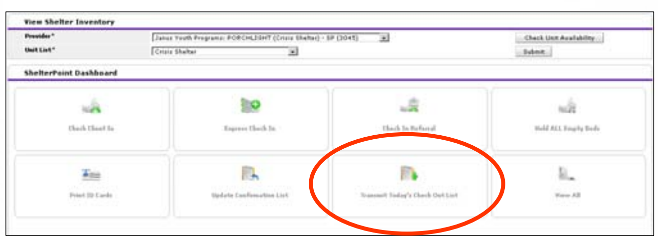
Express Check-Out > Individuals



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!

ShelterPoint

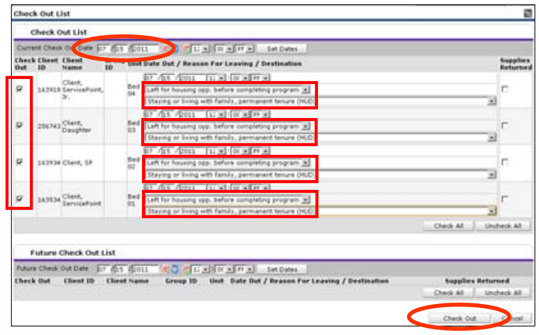
Express Check-Out > Groups



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

ShelterPoint

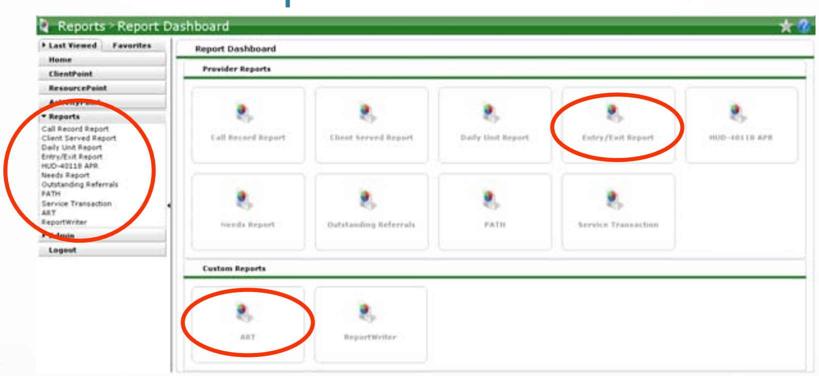
Express Check-Out > Groups



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

Reports Dashboard



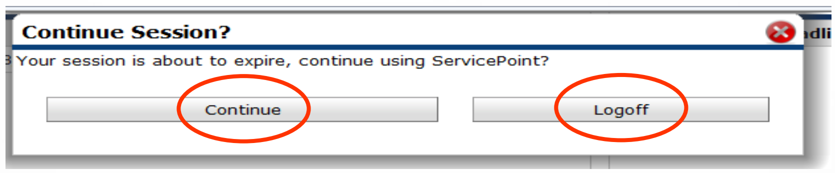
Reports are located in a dashboard of buttons representing different canned reports, as well as the custom reporting tool, ART (which requires a separate training and license.)

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

The End!