



Department of County Human Services
SUN Service System & Community Services

SUN Community Schools New User Training

A screenshot of a web login page. At the top is the SERVICEpoint logo with the tagline "Connecting your community." Below this is the title "NW Social Service Connections". There are two input fields: "User Name" and "Password". A "Login" button is positioned below the password field. At the bottom, there is a link for "Forgot your username or password?" and a copyright notice: "©1999-2011 Bowman Systems L.L.C. All Rights Reserved".


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 and activity information for SUN Community schools, as well as many other programs.

The web address is: portland.servicept.com

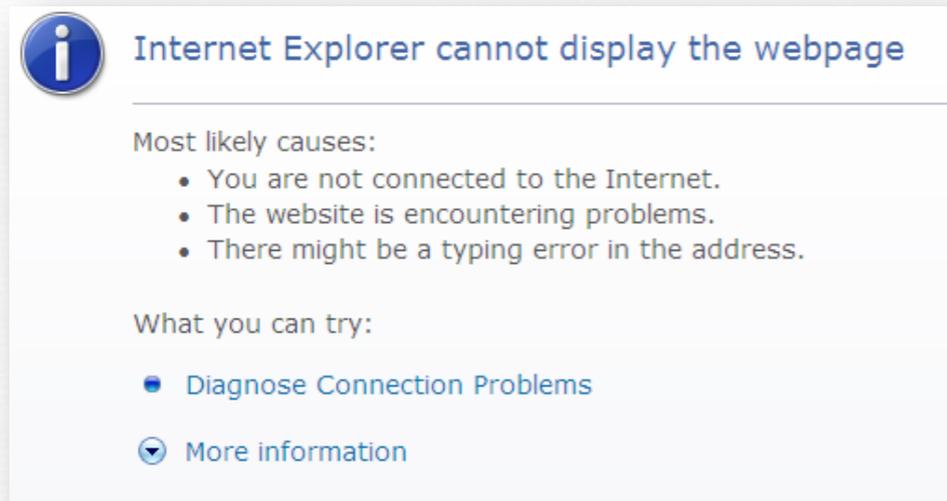
System Requirements

- ◆ **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)
- ◆ **ServicePoint can be used with the following Browsers:**
 - ◆ Google Chrome
 - ◆ Firefox 3+
 - ◆ Internet Explorer 8 (slowest)

Security Certificate (PKI)

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

Internet Explorer



Internet Explorer cannot display the webpage

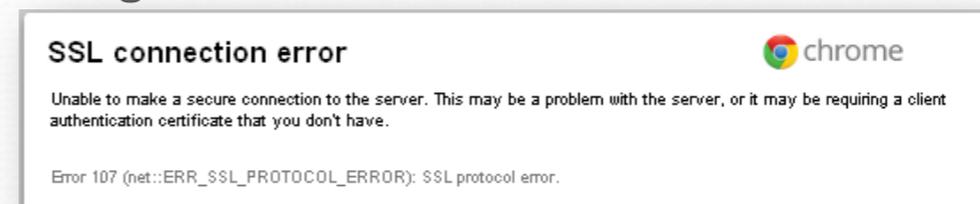
Most likely causes:

- You are not connected to the Internet.
- The website is encountering problems.
- There might be a typing error in the address.

What you can try:

- [Diagnose Connection Problems](#)
- [More information](#)

Google Chrome

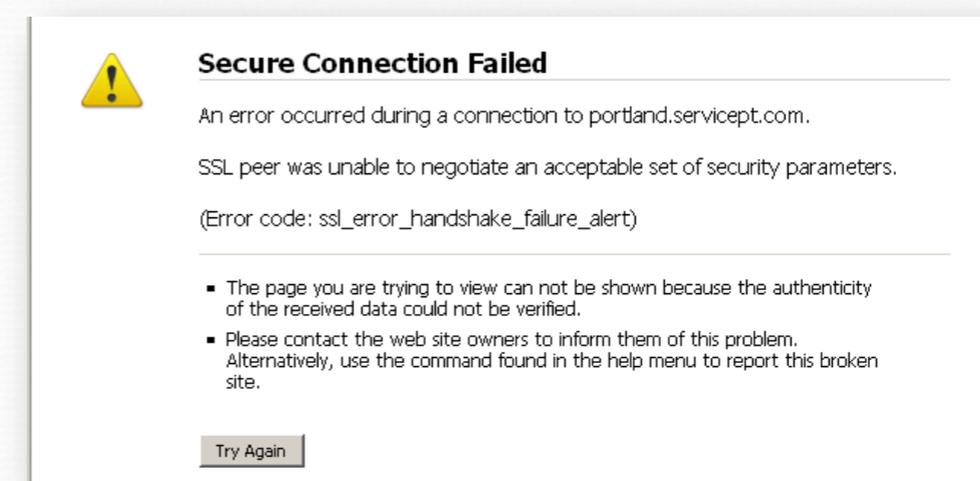


SSL connection error

Unable to make a secure connection to the server. This may be a problem with the server, or it may be requiring a client authentication certificate that you don't have.

Error 107 (net::ERR_SSL_PROTOCOL_ERROR): SSL protocol error.

Mozilla Firefox



Secure Connection Failed

An error occurred during a connection to portland.servicept.com.

SSL peer was unable to negotiate an acceptable set of security parameters.

(Error code: ssl_error_handshake_failure_alert)

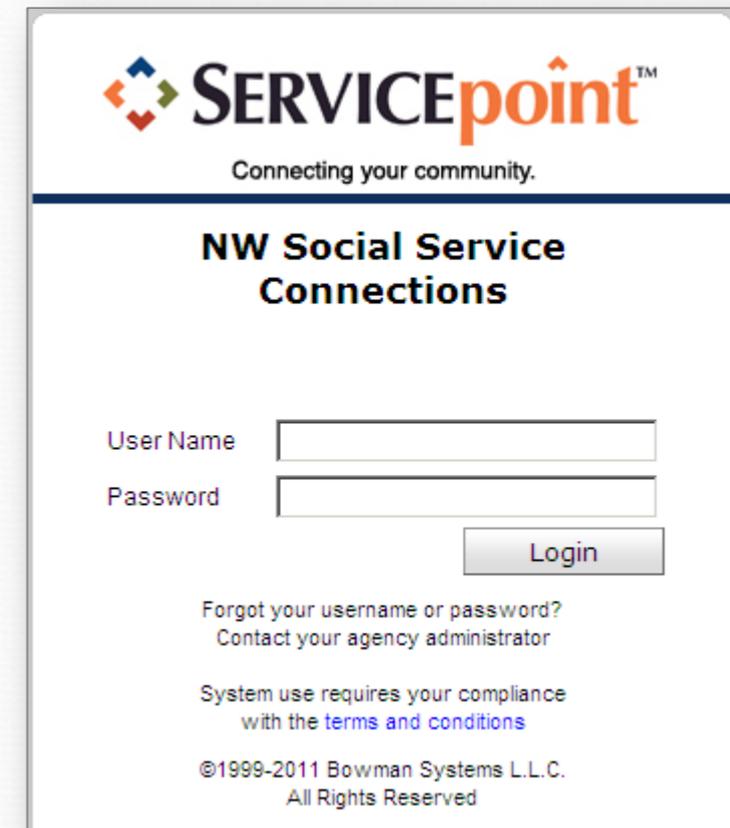
- The page you are trying to view can not be shown because the authenticity of the received data could not be verified.
- Please contact the web site owners to inform them of this problem. Alternatively, use the command found in the help menu to report this broken site.

[Try Again](#)

If you see one of these screens, 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.
- ◆ 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.



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, a disclaimer states "System use requires your compliance with the terms and conditions" and "©1999-2011 Bowman Systems L.L.C. All Rights Reserved".

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

Passwords

- ◆ You will have to change your password the first time you log in.
- ◆ Passwords must be at least 8 characters long, and include two numbers or symbols.
- ◆ Your password will expire every 45 days, and you will be asked to create a new one.
- ◆ If you are locked out at any time, the ServicePoint Team will issue you a temporary password. You will be asked to change it when you attempt to log in again.

Navigating **ServicePoint**

ServicePoint Home Screen

ServicePoint
Connecting Your Community.

NW Social Service Connections
Multnomah County - SP
March 28, 2016

Katie Boldensmith
System Admin

Mode: Shadow
Enter Data As
Back Date
Connect To ART

Home > Home Page Dashboard

Type here for Global Search

Last Viewed Favorites

Home
ClientPoint
ResourcePoint
FundManager
ShelterPoint
ActivityPoint
Reports
Admin
Logout

System News (3)	
Date	Headline
10/06/2011	NWSSC Documents
01/01/2011	NWSSC HMIS Contact information
01/11/2005	Please use the Training Site for testing and training purposes.

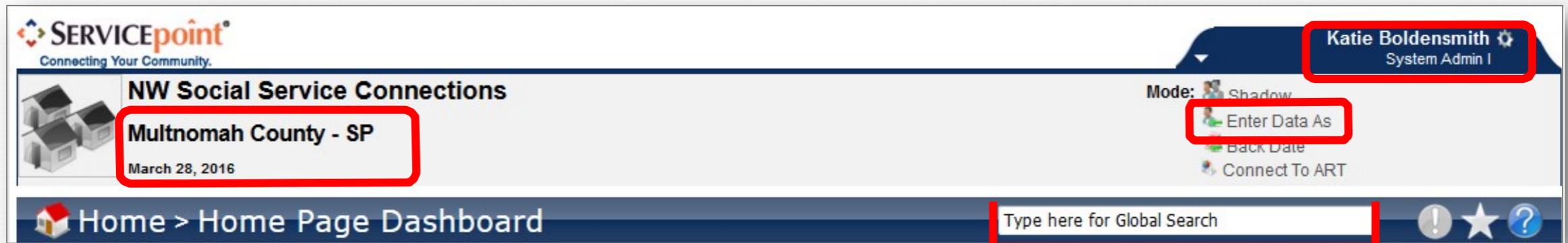
Add System News View All

Customize Home Page Dashboard

Legal Notices

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

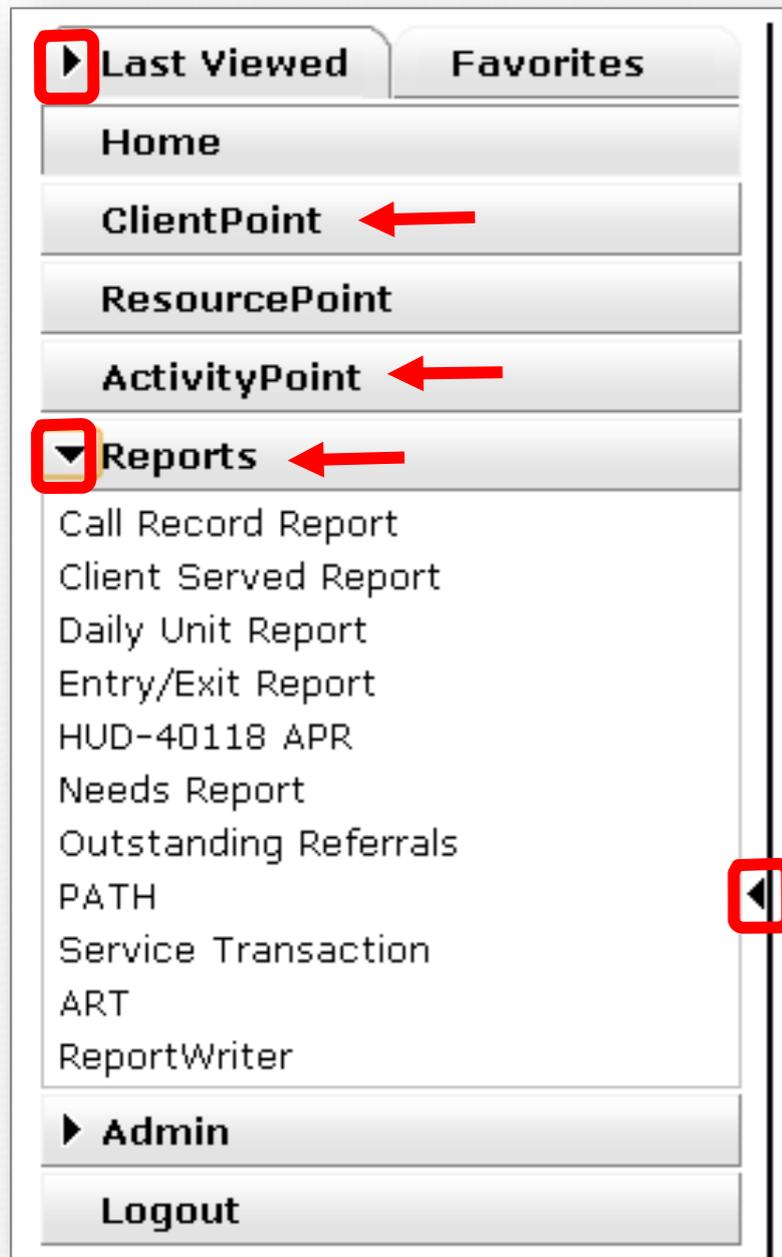
Top Banner



- ◆ Your **Default Provider** and **Today's Date** are on the left side of the screen. "Providers" in ServicePoint are a combination of your agency and project name.
- 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.).
- ◆ **Global Search:** Type in a name to search in various modules of ServicePoint (e.g. ClientPoint or ActivityPoint)

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 (except bed nights.)
- ◆ **ActivityPoint** is where activity and attendance data is collected.
- ◆ **Reports** is where all data reports are located.
- ◆ Arrows (◀) indicate areas that can be collapsed or expanded.

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 Client ID
- ◆ [Less](#) and [More](#) allow you to collapse to the most recent 5 clients, or expand to see the whole list



The screenshot shows a navigation menu with two tabs: 'Last Viewed' and 'Favorites'. The 'Last Viewed' tab is selected and highlighted with a red box. Below the tabs is a list of four client records, each with a small icon to its left and a red box around the text. The records are: 'Client, SP (163934)', 'Client, ServicePoint, Jr. (163918)', 'Client, ServicePoint (163534)', and 'Client, Daughter (206743)'. To the right of the list is a blue 'Less' link, also highlighted with a red box. Below the list are several menu items: 'Home', 'ClientPoint', 'ResourcePoint', 'ActivityPoint', 'SkanPoint', 'Reports', 'Admin', and 'Logout'.

Last Viewed	Favorites
Client, SP (163934)	
Client, ServicePoint, Jr. (163918)	
Client, ServicePoint (163534)	
Client, Daughter (206743)	
Less	
Home	
ClientPoint	
ResourcePoint	
ActivityPoint	
SkanPoint	
▶ Reports	
▶ Admin	
Logout	

System and Agency News

The screenshot shows two overlapping windows. The background window has two tabs: 'System News (3)' and 'Agency News (5)'. The foreground window also has two tabs: 'System News (3)' and 'Agency News (5)'. The 'Agency News (5)' tab in the foreground is highlighted with a red border. Below the tabs is a table with two columns: 'Date' and 'Headline'. The table contains five rows of news items. The last row, dated 12/22/2006, has a headline that is highlighted with a red box: 'ServicePoint Homepage, Multnomah County ServicePoint Helpline & Data Entry Guides'. At the bottom of the foreground window are two buttons: 'Add Agency News' and 'View All'.

Date	Headline
10/06/2011	NWSSC Documents
01/01/2011	NWSSC HMIS Contact information
01/11/2005	Please use the Training Site for testing and t
03/25/2016	SUN Community Schools Data Entry Made Easier!
02/09/2016	ServicePoint Customer Satisfaction Survey Results are In
09/08/2015	END VETERAN HOMELESSNESS Final Push and your help is needed
01/13/2010	Multnomah County-SUN Service System & Community Services
12/22/2006	ServicePoint Homepage, Multnomah County ServicePoint Helpline & Data Entry Guides

- ◆ System and Agency News overlap. Click the **Agency News** tab for alerts most relevant to the SUN Service System.
- ◆ Click a news item [hyperlink](#) to open and view it.
- ◆ The **ServicePoint Helpline** contact info and links to user **training materials** can be found here.

Navigating **ClientPoint**

Searching for Clients

ClientPoint > Client Search

Client Search

Note: Please Search the System before adding a New Client.

Name: (First) (Middle) (Last) (Suffix)

Alias:

Social Security Number: - -

Social Security Number Data Quality:

Exact Match

Search

Client Number

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

Client ID #

- ◆ 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**).

Client Search Results

Client Results									
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count	
		109	client, brother					1	
		107	client, child					1	
		108	client, mom					1	
		310	Client, Sample					0	
		122	client, test a	111-11-1112	05/18/1959		Male	1	

Showing 1-5 of 5

- ◆ Click the pencil icon on the left to view a 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

The screenshot shows the ClientPoint Client Search interface. The left sidebar contains navigation options: Last Viewed, Favorites, Home, ClientPoint, ResourcePoint, ActivityPoint, Reports (Call Record Report, Client Served Report, Daily Unit Report, Entry/Exit Report, HUD-40118 APR, Needs Report, Outstanding Referrals, PATH, Service Transaction, ART, ReportWriter), Admin, and Logout. The main content area is titled 'Client Search' and includes a message: 'Please Search the System before adding a New Client.' Below this is a form with fields for Name (First, Middle, Last, Suffix), Alias, Social Security Number, Social Security Number Data Quality, and Exact Match. The 'Add New Client With This Information' button is highlighted with a red box. Below the form is a 'Client Number' section with a 'Client ID #' field and a 'Submit' button. At the bottom, the 'Client Results' section shows a table with columns: ID, Name, Social Security Number, Date of Birth, Alias, Gender, and Banned. The table currently displays 'No matches.'

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

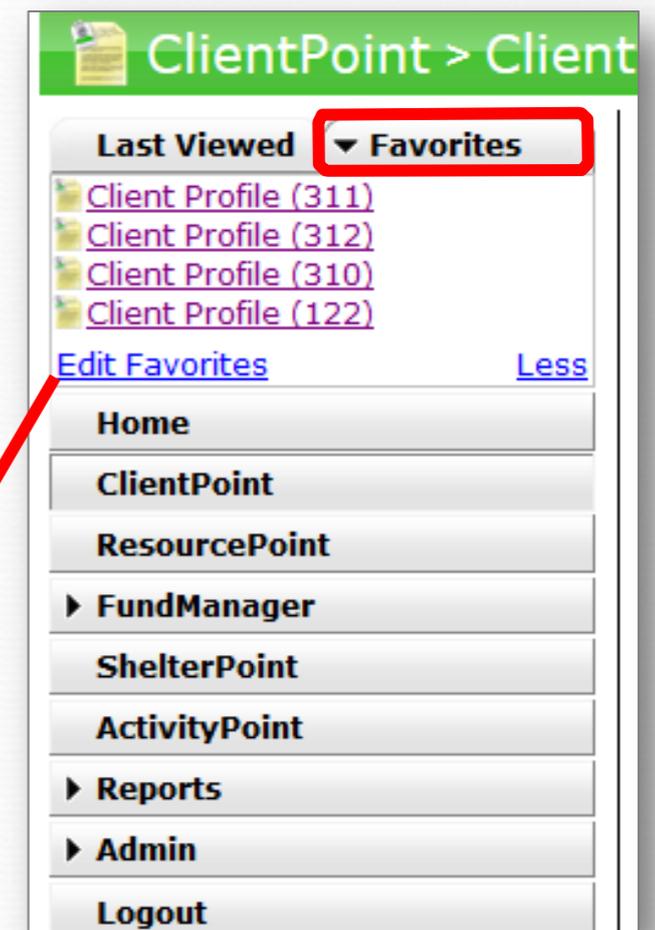
Favorites List

Users can create up to **10** client hyperlinks by adding them to their **Favorites List**

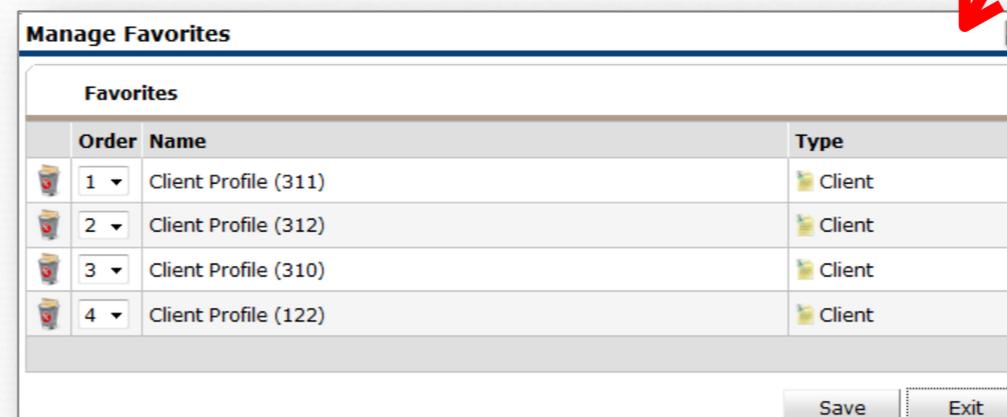
- ◆ Inside of a client's record, click the yellow star in the top right corner to add to your **Favorites** list



- ◆ To view your Favorites List, click the Favorites tab in the main menu and hover over a Client ID to see their name



- ◆ [Edit Favorites](#) link allows users to change the order or delete **Favorites** from the list



Manage Favorites		
Favorites		
Order	Name	Type
1	Client Profile (311)	Client
2	Client Profile (312)	Client
3	Client Profile (310)	Client
4	Client Profile (122)	Client

Save Exit

Client Records

Two main tabs allow you to view, enter, and edit all client data:

Client - (1) Test, Justine A

(1) Test, Justine A
Release of Information: None

-Switch to Another Household Member- Submit

Client Information Service Transactions

Assessments Households Client Profile Entry / Exit Activities

Select an Assessment

-Select- Submit

DSCP Profile_SUN CS

Save Cancel

Answer the questions below for ALL PARTICIPANTS

Date of Birth 01 / 02 / 1965

Gender Other

- ◆ **Assessments** tab: contains all *required* and *optional* client data points (demographics, parental release, teacher/grade, contact info, transportation, etc.)
- ◆ **Activities** tab: allows you to enroll clients in activities and see all *current* and *past* activities

Less Frequently Used Tabs:

- ◆ **Households** tab: allows you to link household members (only required for EKT)
- ◆ **Client Profile** tab: only used for editing a client's name
- ◆ **Entry/Exit** tab: displays enrollment in other projects (if user visibility settings allow)

Navigating **ActivityPoint**

Activity Search

ActivityPoint > Search Type here for Global Search

Activities Volunteers

Activity Search

i Search for Activities by using keywords for the Name.

Search

Provider Please choose a provider. Search **My Provider** Clear

Include Past Activities

Start Date / /   

End Date / /   

Search Clear Add New Activity

Searching for an activity by **keywords** may give you too many/few results. Improve your search by adding the following prompts:

- ◆ Check **Include Past Activities** to find activities that have ended already
- ◆ Add a **Start and End Dates** to filter down to activities in a certain timeframe
- ◆ If you have access to multiple 'Providers' (schools), remember to '*Enter Data As*' and click **My Provider** to find a list of activities at *that* school

Activity Info Sessions Enrollment Attendance Volunteers

Activity ID: 58593
 Provider: Multnomah County - SP (2206)
 Name*: Summer Reading Club
 Activity Type*: Local Public
 Ages*: 10 - 18
 Time Offered*: Summer
 Frequency*: More than twice a week
 Recurring Weekly Schedule: Sunday Monday Tuesday Wednesday Thursday Friday Saturday
 Start Date*: 07 / 05 / 2016
 End Date*: 08 / 26 / 2016
 Start Time*: 10 : 00 AM
 End Time*: 12 : 00 PM
 Teacher: Mr. Books
 Location: Library
 Enrollment Type: Open
 Max Enrollment*: 30
 Enrollment Status: 30 Slots Remaining
 Category*: SUN-Academic Improvement/Remediation

Subject

-Select- Add Subject

Subject Name
SUN-Reading/Literacy

Showing 1-1 of 1

Target Participant Groups

-Select- Add Target Participant Group

Target Participant Group
SUN-Community/Neighborhood Residents
SUN-Families
SUN-Students/Youth

Showing 1-3 of 3

Partners (Activity Sponsors)

Add Partner

Partner/Activity Sponsor
Multnomah County Library Books-2-You

Showing 1-1 of 1

Copy Activity Save Save & Exit Exit

Activity Information

Four main tabs contain all activity data:

- ◆ **Activity Info:** all key activity details (name, dates, times, subjects, target participant groups, etc.),
- ◆ **Sessions:** a list of each particular *date* that an activity takes place on
- ◆ **Enrollment:** a list of all clients enrolled in the activity
- ◆ **Attendance:** tracks attendance of each client (from Enrollment tab) for every day (from Sessions tab)
- ◆ The **Volunteers** tab has the ability to track all volunteers at your site and their involvement in particular activities. However, there are currently NO REPORTS available for this data.



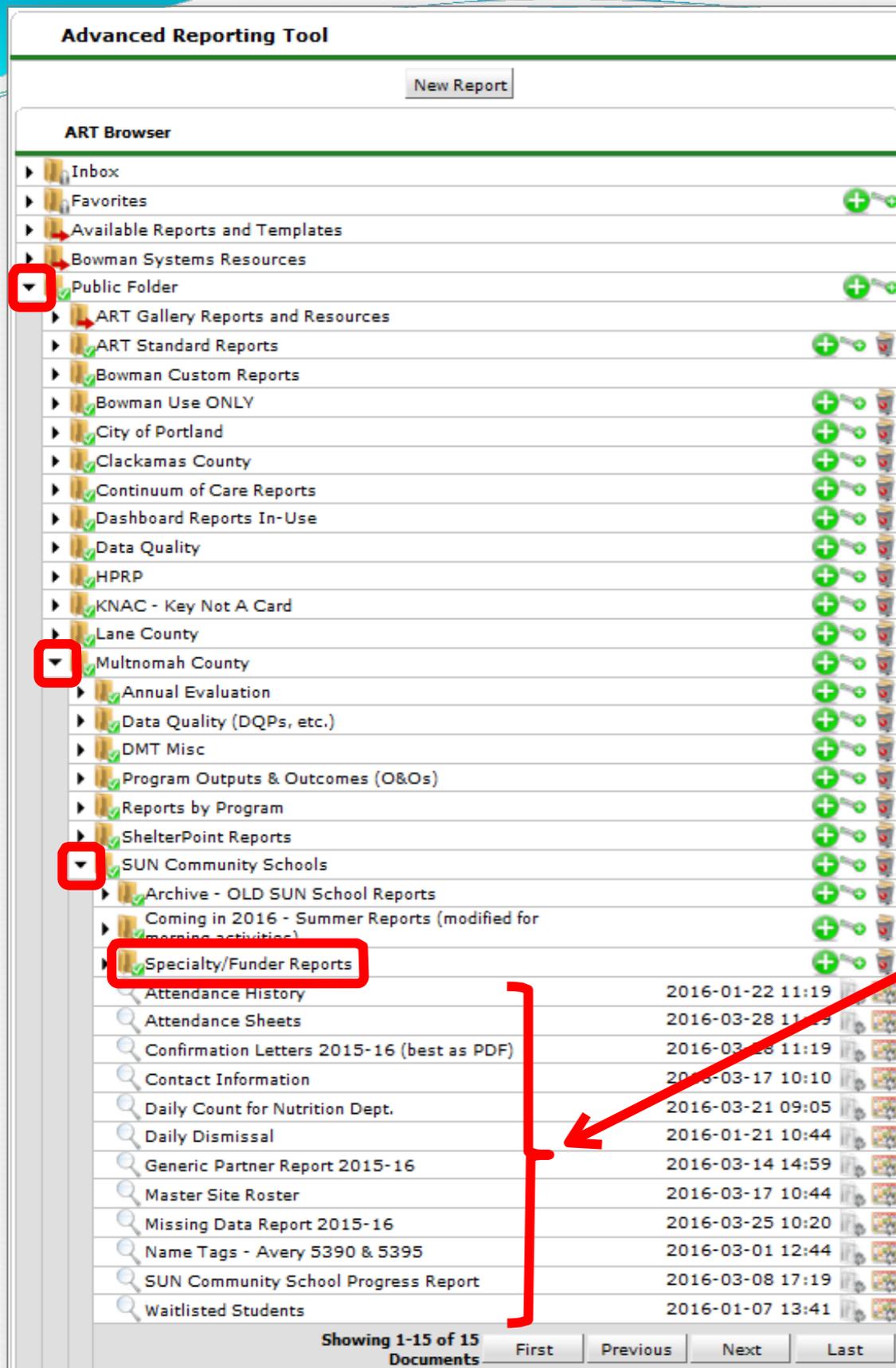
Navigating ART

(Advanced Reporting Tool)

Reports Dashboard

The screenshot displays the 'Reports Dashboard' interface. On the left, a navigation menu is visible with a 'Reports' section highlighted in red. This section lists various report types, with 'ART' and 'ReportWriter' also highlighted in red. The main dashboard area is titled 'Report Dashboard' and is divided into two sections: 'Provider Reports' and 'Custom Reports'. The 'Provider Reports' section contains ten report icons: Call Record Report, Client Served Report, Daily Unit Report, Entry/Exit Report, HUD-40118 APR, Needs Report, Outstanding Referrals, PATH, and Service Transaction. The 'Custom Reports' section contains two report icons: ART and ReportWriter. A red box highlights these two icons and a text box that reads: 'Consult the **SUN Community School ServicePoint Handbook** for instructions on how to use **ReportWriter**'. The text box is also highlighted in red.

ART and ReportWriter reports can be located either in the Reports menu on the left of the screen, or by clicking the icons at the bottom of the Report Dashboard



SUN School ART Reports

All ART reports for SUN Schools can be found by following this folder path:

Public Folder >
 Multnomah County >
SUN Community Schools

The core set of SUN School reports are located here

The **Specialty/ Funder Reports** subfolder contains specialized reports for particular funders, custom agency reports, etc.

System Refresh

NOTE: ART is NOT a live reporting tool. The data entered in ServicePoint syncs up with ART **twice daily** when the system refreshes (typically around 3:00am and 3:00pm).

The time of the last system refresh is displayed at the bottom of the ART screen:

Reports > ART

Type here for Global Search

Last Viewed Favorites

Home

ClientPoint

ResourcePoint

ActivityPoint

Reports

Admin

Logout

Advanced Reporting Tool

New Report

ART Browser

- Inbox
- Available Reports and Templates
- Bowman Systems Resources
- Public Folder

Showing 1-5 of 5 Documents

First Previous Next Last

Scheduled Reports

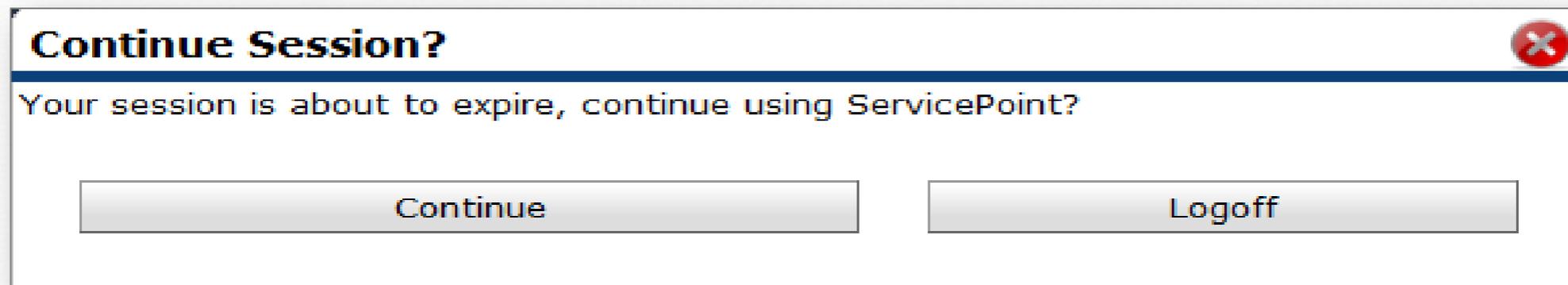
Name	Interval	Start Date	End Date	Type	Status
Last Warehouse Build: March 29, 2016 03:25:15 AM					

Refresh

Legal Notices

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