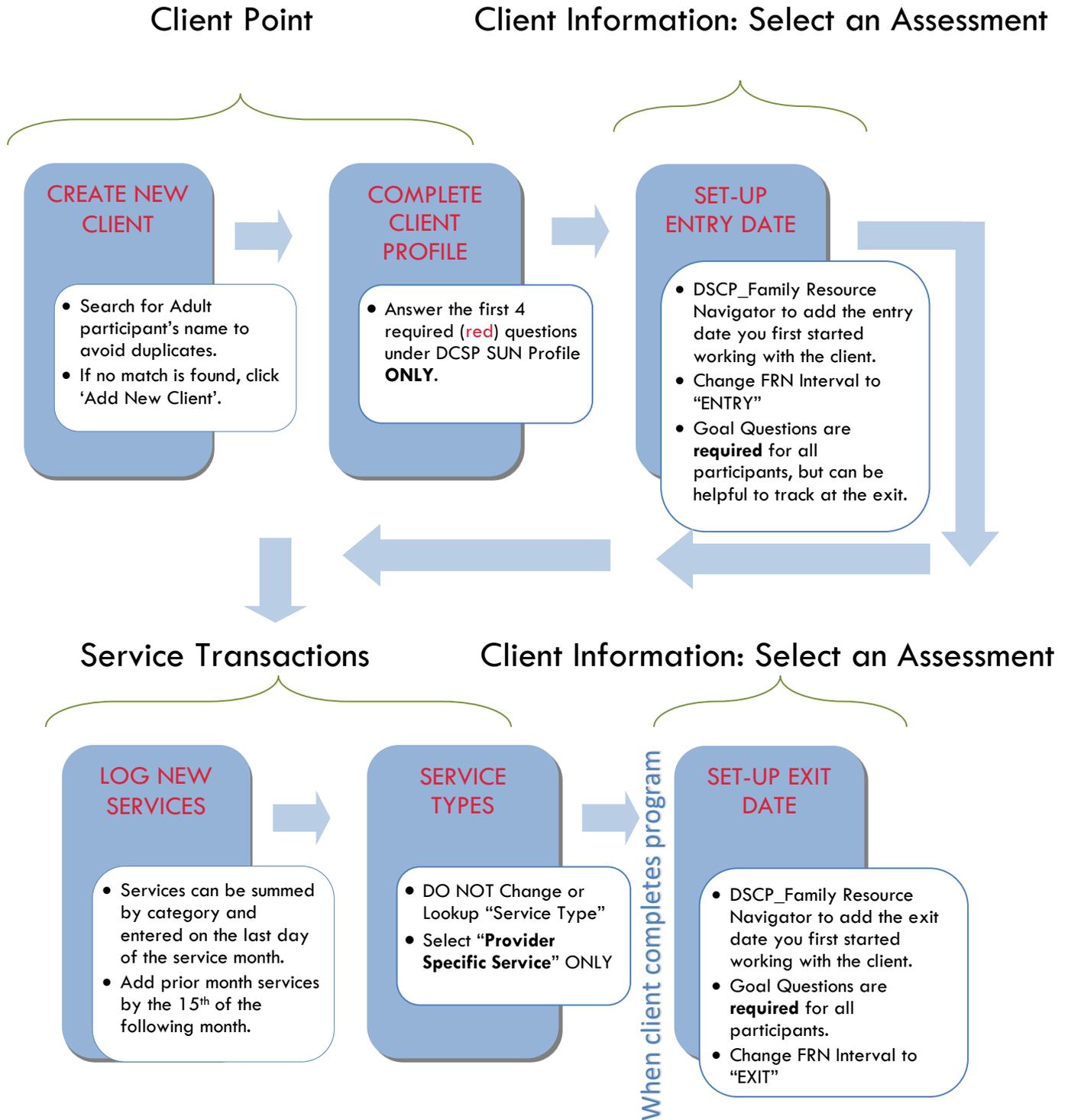


Family Resource Navigator – Service Point Data Entry Work Flow



FAMILY RESOURCE NAVIGATOR PROGRAM

The Family Resource Navigator (FRN) position is responsible for providing trauma-informed, short-term case management, providing information and referral assistance, and supporting families navigate systems of care in the assigned schools.

Family Resource Navigators will provide the following activities:

- Case Management
- Language Supports
- Group Skill building and Workshops
- Outreach

All ServicePoint Data for the previous month must be entered by the 15th of every month.
(Example: September data is due on October 15th)

CLIENT POINT

Find Parent in ServicePoint. If the Parent is not in ServicePoint then **ADD** them to the system.

- If you are working with more than one person in the household, *you do not need to create profiles for every member of the family.*

Client Search

1 Please Search the System before adding a New Client.

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

2 Search Clear Add New Client With This Information

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

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1183822	MCTesteron, Testy		10/01/2015				0

3

If client is not in the system --- "Add new client with this Information"

- You'll automatically land in the Client Information Tab. Add the profile info for the client under "DSCP Profile_SUN CS"— only the red questions 1- 4 are required (DOB, Gender, Language & Inclusive ID).
- As an FRN – you do not need to add more information after "Inclusive Identity".
- Scroll to the bottom of the page and "SAVE" – Do not exit. Return to the top of the page after saving.

Client Information

Assessments

DSCP Profile_SUN CS

Answer the questions below for ALL PARTICIPANTS

1 Date of Birth

2 Gender

If Other Gender, specify

3 Primary Language

If Primary Language is Other, then Specify:

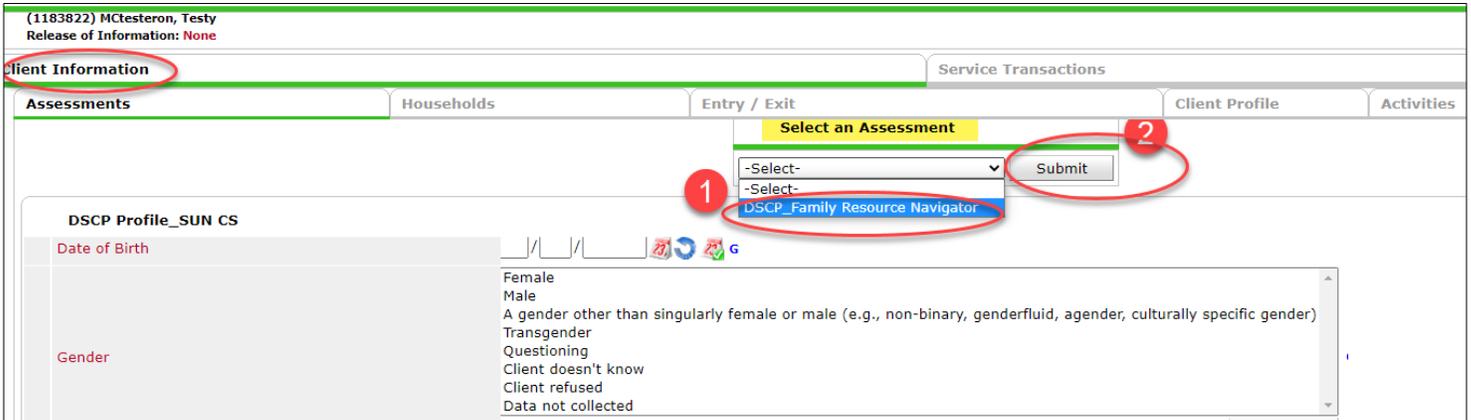
Inclusive Identity (Race/Ethnicity/Origin)

4 Start Date*

Add

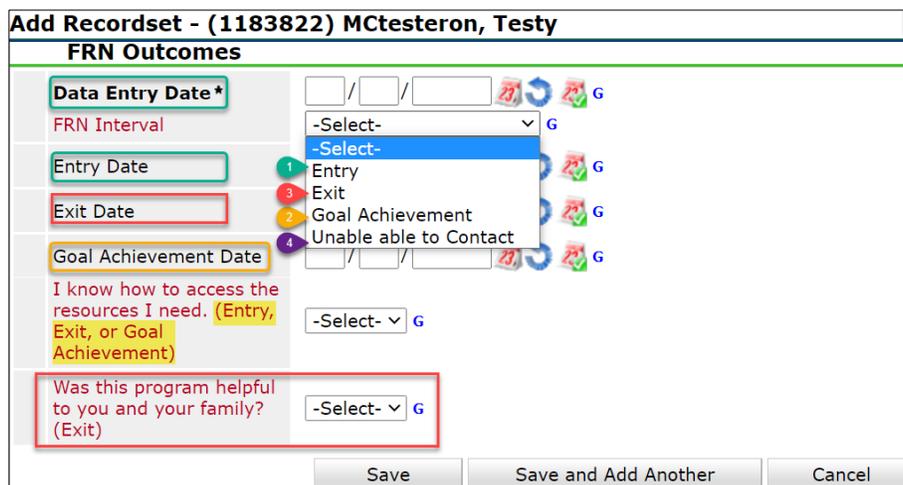
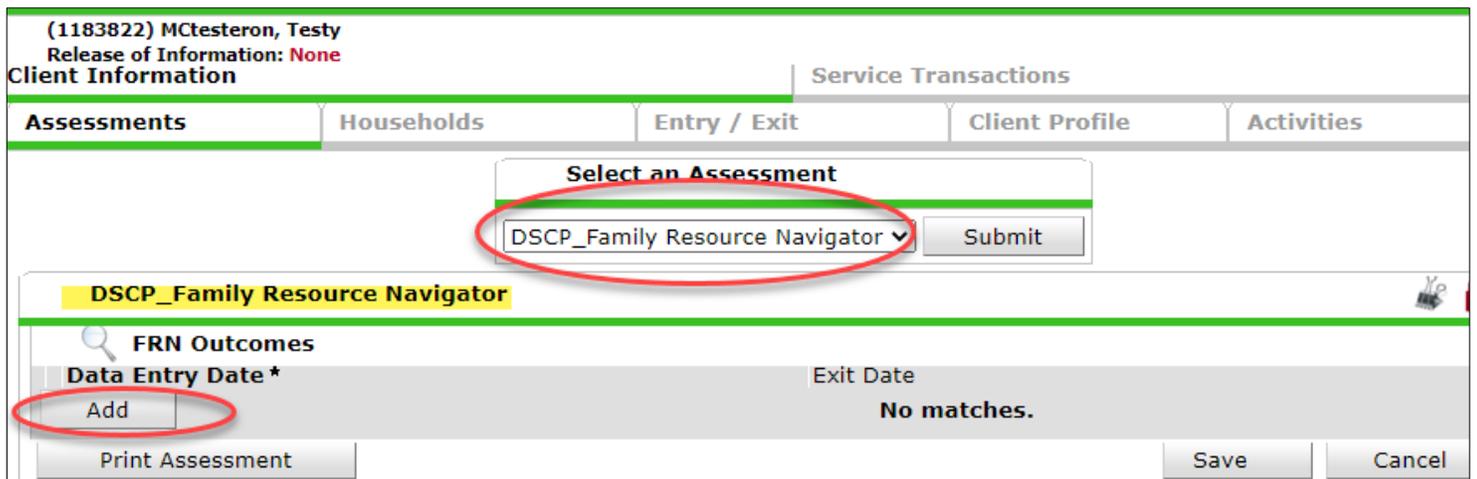
ENTRY AND EXIT ASSESSMENT

Stay within the “Client Information” tab, at the top of the page, in the center, select the drop-down arrow under “Select an Assessment” choose **DSCP Family Resource Navigator**, and hit submit.



The FRN Menu landing page will **auto-populate**. In this section, you will add all Entries, Goal Achievement, and Exit Dates.

Select Add to create an “ENTRY” when you first begin working with a client. When you select “ADD” a small window will open.



ENTRY: When you first meet with a client, create an entry to add the “Start date” of when you started working with the client.

Answer (Y/N) “I know how to access the resources I need.”

OPTIONAL GOAL ACHIEVEMENT: Edit your initial entry to add an **OPTIONAL** “Goal Achievement”, sometime between an Entry and Exit.

Answer (Y/N) “I know how to access the resources I need.”

EXIT: At the end of the program, edit the initial entry once again to add an “Exit Date.”

Answer (Y/N) “Was the program helpful to you and your family?”

The image shows three screenshots of the 'FRN Outcomes' form. The first, labeled 'ENTRY EXAMPLE', shows the 'Data Entry Date' as 01/01/2022 and the 'FRN Interval' as 'Entry'. The second, labeled 'GOAL ACHIEVEMENT EXAMPLE', shows the 'FRN Interval' as 'Goal Achievement' and the 'Goal Achievement Date' as 01/10/2022. The third, labeled 'EXIT EXAMPLE', shows the 'FRN Interval' as 'Exit' and the 'Exit Date' as 04/01/2022. All three examples show the 'Data Entry Date' as 01/01/2022 and the 'Was this program helpful?' question answered 'Yes'.

The method of collecting the answers to the two bottom questions is up to you. If you are unable to reach a client for their response, it’s ok to leave it **blank**. Do not select “No”. You can also select the option **“Unable to contact”**.

After you save your entry, you will return to the FRN landing page. You should see a date in the “Data Entry Date” field.

The screenshot shows the 'Client Information' page with tabs for 'Assessments', 'Households', 'Entry / Exit', and 'Client Profile'. Under 'Assessments', there is a table with one entry: 'DSCP_Family Resource Navigator'. A red arrow points to a pencil icon next to the entry. A red box highlights the 'DSCP_Family Resource Navigator' dropdown menu. Below the table is the 'FRN Outcomes' section with a table containing one row: 'Data Entry Date *' with the value '01/01/2022' and an 'Exit Date' field. A red arrow points to the pencil icon next to the 'Data Entry Date' field.

When you are ready to exit a client, you will need to come back to this page when the client completes the program. Edit the same entry by clicking on the Pencil Icon and adding an **“Exit Date.”**

The screenshot shows the 'FRN Outcomes' table with one entry: 'Data Entry Date *' with the value '01/01/2022' and 'Exit Date' with the value '04/01/2022'. A red box highlights the 'Exit Date' field. A red callout box with an arrow pointing to the 'Exit Date' field contains the text: 'You've successfully exited a client when you see an Exit Date in this field.'

ADDING SERVICES

After you add the initial Entry, select the **Service Transaction** tab at the top of the page.

The screenshot shows the 'Client Information' page with several tabs: 'Assessments', 'Households', 'Entry / Exit', 'Service Transactions', and 'Client Profile'. The 'Service Transactions' tab is circled in red. A red arrow points from the text below to this tab. Below the tabs, there is a section for 'DSCP_Family Resource Navigator' with a dropdown menu and a 'Submit' button. Below that is the 'FRN Outcomes' section with a 'Data Entry Date*' field containing '01/01/2022' and an 'Exit Date' field. An 'Add' button is at the bottom left, and 'Showing 1-1 of 1' is at the bottom right.

Inside the **Service Transactions** tab, click “ADD SERVICE”.

The screenshot shows the 'Service Transaction Dashboard' for client '(1183822) MCTesteron, Testy'. The 'Service Transactions' tab is circled in red. The dashboard contains several buttons: 'Add Need', 'Add Service' (circled in red), 'Add Multiple Services', 'Add Referrals', 'View Previous Service Transactions', 'View Shelter Stays', and 'View Entire Service History'.

In the next window add a start date and select one of the three **Provider Specific Services**: Case Management, Group Skill Building/Workshops, Language Supports, or Outreach.

See the FRN Data Tracking FAQ for **Provider Specific Service** definitions.

Client - (1183822) MCTesteron, Testy
 (1183822) MCTesteron, Testy
 Release of Information: **None**

Client Information | **Service Transactions**

Add Service

▼ Household Members
 This Client is not a member of any Households.

Service Provider 2: SUN- Elementary - SP

Creating User: Nayeli Perez Martinez

Start Date * 3: [] / [] / [] [] : [] : [] []

End Date: [] / [] / [] [] : [] : [] []

Service Type * 4: -Select- [Look Up]

Provider Specific Service: -Select-

1: Start date can be ANY date within the month the service was provided. An End Date is not needed. Leave blank.

Leave "Service Type" as is. The field will change automatically to "Basic Needs".

1. Begin in the Service Transaction Tab
2. Double check that you have the correct provider school
3. Clear the start date and enter a date within the month the service was provided
4. Select Provider Specific Service that was provided – Case Management, Group Skill Building, Language Support, or Outreach.

After you select SAVE AND CONTINUE, the window will expand to show **service staff, service notes, and service costs**. You will need to count all of the **same types** of services provided in the **same month to one person**. We are looking for the cumulative total services provided to a person per month.

Service Provider 1: Impact Northwest: SUN-Markham Elementary - SP (5373)

Creating User: Nayeli Perez Martinez

Start Date * 2: 01 / 01 / 2022 [] : 12 : 00 : 00 PM

End Date: [] / [] / [] [] : [] : [] []

Service Type * 4: Basic Needs (B)

Provider Specific Service 3: Case Management

Service Staff: -Select- [X]

Service Notes: [X]

5: This section can be used but is OPTIONAL. Please do not enter "case"

Service Costs

Number of Units 4: 1

Unit Type 5: -Select-

Cost per Unit: [X]

Total Cost of Units: \$ [X]

All services are FREE. Do not add a "cost". Leave blank.

Do not add information below the **SERVICE COSTS** section. Scroll to the bottom to **“SAVE AND EXIT”**.

Client - (1183822) MCTesteron, Testy

(1183822) MCTesteron, Testy
Release of Information: None

Client Information Service Transactions

Household Members

This Client is not a member of any Households.

Service Provider* : SUN-I Elementary - SP

Creating User: Nayeli Perez Martinez

Start Date*: 01/01/2022 12:00:00 PM

End Date: / /

Service type*: Basic Needs (B)

Provider Specific Service: Case Management

Service Staff: -Select-

Service Notes:

Service Costs

Number of Units: 1

Unit Type: -Select-

Cost per Unit: \$

Total Cost of Units: \$

Apply Funds for Service

Conditional Commitments

Responsible Party Condition Due Date Status

Add Conditional Commitment Print Commitment Letter No matches.

Support Documentation

Date Added Name Type

Add Support Documentation No matches.

Follow Up Information

Projected Follow Up Date: / /

Follow Up User: Impact Northwest: SUN-Markham Elementary - SP (5373)

Follow Up Made: -Select-

Completed Follow Up Date: / /

Need Information

Need Status*: Identified

Outcome of Need: -Select-

If Need is Not Met, Reason: -Select-

Do not enter information below "Apply Funds for Service" section. Disregard all of the fields below and scroll to the bottom to "SAVE and EXIT".

Scroll to the bottom of the screen to SAVE

Save Save & Exit Exit

Here is an example if you are using ServicePoint: For the month of February, this client received 4 services of Case Management, 2 services of Language Support, and 1 service for Outreach.

Previous Services				
Select Dates	Start Date	End Date		
-Select-	/ /	/ /		Search
Service Start Date	Provider Specific Service	Service Units	Service Units Type	
02/10/2022	Case Management	4	Count	
02/10/2022	Language Supports	2	Count	
02/10/2022	Outreach	1	Count	

FRN ServicePoint Handbook - Revision History

- **Revised February 2022:** Added screenshots to illustrate every data entry step.
- **Revised May 2022:** Added Case Manger to workflow