

ClientPointTM

Data Entry Workflow

ClientPoint

“The filing cabinet!”

Connecting Your Community.

ClientPoint > Client Search

▶ Last Viewed Favorites

Home

ClientPoint

ResourcePoint

ShelterPoint

SkamPoint

▶ Reports

▶ Admin

Logout

Client Search

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

	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	<input type="text" value="-Select-"/>				

Search for existing clients, or add clients
DO NOT add a new client unless you have
done both name and SSN search.

“Client Information Tab”

Client Profile Type here for Global Search

Client - (11452) Pitts, De'Jon 🔒

(11452) Pitts, De'Jon
Release of Information: **None** -Switch to Another Household Member- ▾ Submit

Client Information Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit

Added to the system 09/11/2009 04:35 PM

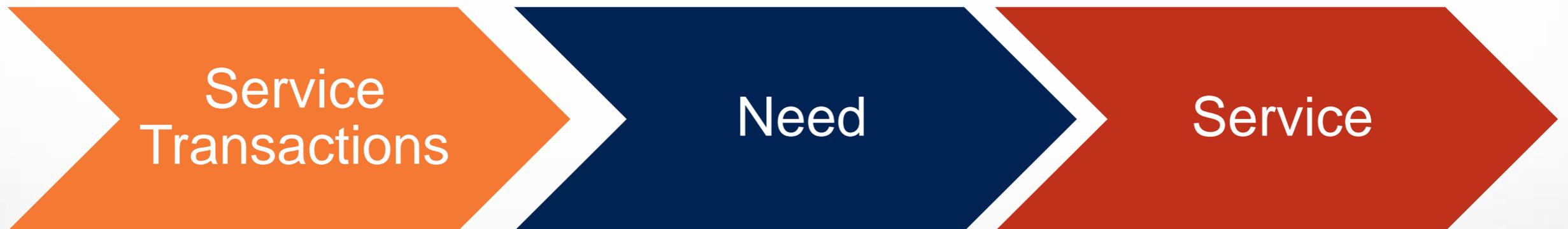
Name	Pitts, De'Jon
Date of Birth	02/21/1992 (Age 24)
Social Security	521-85-7635

Gender	Male
Primary Race	Black or African American (HUD)
Secondary Race	
U.S. Military Veteran?	



- Summary
- Client Profile
- Households
- Release of Information (ROI)
- Entry/Exit

Data Entry Made Easy!
Follow the tabs through the record.





Click the pencil to add, edit or update.
Note: These data elements create the client's unique ID. Altering these data will alter the Unique Identifier for reporting in the database.

All data in Client Record must be filled out with the exception of "Alias"

*Anything with an asterisk or highlighted in **red** must be filled out.*

om/harfordcounty_training/com.bowmansystems.sp5.core.Service

ing Site
rnment

t Profile

Client - (11452) Pitts, De'Jon

(11452) Pitts, De'Jon
Release of Information: **None**

Client Information

Summary Client Profile Household

Client Record

Name	Pitts, De'Jon
Name Data Quality	
Alias	
Social Security	521-85-7635
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	
Age	24

Client Demographics

Date of Birth *	
Date of Birth Type *	
Gender *	
Primary Race *	
Secondary Race	
Ethnicity *	

Household

Create Relationships between records before entering clients into programs or providing services!

systems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:

- Add Client ONLY
- Add Client and Add NEW Household
- Add Client and SEARCH Households

Cancel

First
Monty

Full Name

111 - 4

Full SSN Reported (HUD)
No (HUD)

For NEW Households with multiple members, choose **“Add Client and Add NEW Household”**

Household

- When adding Single Adults, a Household does not need to be created.
- Choose “Add Client ONLY”

systems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:

Add Client ONLY

Add Client and Add NEW Household

Add Client and SEARCH Households

Cancel

First
Monty

Full Name

111 - 4

Full SSN Reported (HUD)
No (HUD)



➤ Choose Household Type

➤ Continue entering family members

➤ You will see that household members are being added at the bottom

➤ When finished entering all family members, Click “Continue”

nsystems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Household Type

Household Type *

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last
	<input type="text" value="Andrew"/>	<input type="text"/>	<input type="text" value="Python"/>
Name Data Quality	<input type="text" value="Full Name Reported"/>		
Alias	<input type="text"/>		
Social Security Number	<input type="text" value="112"/>	- <input type="text" value="45"/>	- <input type="text" value="7896"/>
Social Security Number Data Quality	<input type="text" value="Full SSN Reported (HUD)"/>		
U.S. Military Veteran?	<input type="text" value="No (HUD)"/>		
Exact Match	<input type="checkbox"/>		

Client Number

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

Client ID #

Client Results

Name	Social Security Number	Date of Birth	Alias
No matches.			

Selected Clients

	Name	Social Security Number	Date of Birth	Alias
3284	Python, Andrew	112-45-7896		
3283	Python, Monty	111-45-2368		

Showing 1-2 of 2

Household

- Designate 1 person as **Yes**, Head of Household
 - Relationship to Head of Household = **Self**
- NOTE: Only one member of the household grouping should be listed as the Head of Household. All other member relationships should be based on who was designated the Head of Household.*

bowmansystems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Household Information - (6626) Male Single Parent

(6626) Male Single Parent Save Save & Exit Exit

Household Type *	Male Single Parent
Income	US\$0.00 monthly (US\$0.00 annual)
Client Count	2

Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count	
(23284) Python, Andrew		Yes	Self	09 / 27 / 2016	0	1	
(23283) Python, Monty		No	Son	09 / 27 / 2016	0	1	

Add/Delete Household Members Household History Report

▶ Previous Household Members

Joined Household* = Date of Intake or Arrival into the program.

ROI

Check off all household members that apply!

ordcounty_training/com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=23283;subview=clientInforma

Client - (23283) Python, Monty

(23283) Python, Monty

Release of Information: **None**

Summary Client Profile

Release of Information

Provider

Add Release of Information

Release of Information

Release of Information - (23283) Python, Monty

Household Members

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

- (6626) Male Single Parent
 - (23284) Python, Andrew
 - (23283) Python, Monty

Release of Information Data

Provider *	Harford County Government (1)	Search	My Provider
Release Granted *	Yes		
Start Date *	09 / 27 / 2016		
End Date *	/ /		
Documentation	Signed Statement from Client		
Witness			

Save Release of Information

- Release Granted = **Yes!**
- Start Date = **Entry to Program**
- End Date = **1 year from start date**
- Documentation = **Signed Statement from Client**

• **Always SAVE!**



Entry Exit
1-2-3

Enter a client into a program.
Often referred to as intake, enrollment,
participation, etc...

- 2.** **A window will pop up:** Follow the page from top to bottom!
Include all household members when appropriate
*Answer all required fields****
Set Entry Time to 12:00:00 PM always

Harfordcounty_training/com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=23283;subview=clientInformation;subviewClientInfo=f

Edit Entry Data - (23283) Python, Monty

Household Members

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

- (6626) Male Single Parent
- (23284) Python, Andrew (Entry Date: 09/27/2016 11:18 AM)
- (23283) Python, Monty (Entry Date: 09/27/2016 11:18 AM)

Edit Entry Data - (23283) Python, Monty

Provider	Harford County Government (1)
Type	HUD
Entry Date *	09 / 27 / 2016 12 : 00 : 00 PM

1.

3.

Type = HUD

Entry Exit

4 - Assessment Questions

Answer all questions on the **HUD COC & ESG Entry Assessment**. These fields are important for reporting status at Entry.

4.

Follow the screen from top to bottom.

- Answers may trigger other fields to pop up.
- Answer the additional questions

Select an Assessment

HUD UDEs for All other Projects (2016) Annual Assessment (2016) HUD CoC & ESG Entry All Other Projects (2016) HUD

HUD CoC & ESG Update (2016)

Household Members

(23284) Python, Andrew
Age: Unknown
Veteran: No (HUD)

(23283) Python, Monty
Age: 48
Veteran: No (HUD)

Household Data Sharing

Client: (23283) Python, Monty

HUD CoC & ESG Entry All Other Projects (2016)

Entry Date

Date of Birth *	06 / 20 / 1968    G
Date of Birth Type *	Full DOB Reported (HUD)  G
Primary Race *	White (HUD)  G
Secondary Race	-Select-  G
Ethnicity *	Non-Hispanic/Non-Latino (HUD)  G
Gender *	Male  G
Relationship to Head of Household *	-Select-
Client Location *	-Select-  G
Residence Prior to Project Entry *	-Select-

Entry Exit

4 - Assessment Questions

There are additional Data Elements with pop up boxes that must be answered completely. The **red** triangle means something was missed.

- Answers in the pop up boxes should coincide with information related to this section i.e. If you answered “No” to income and put “0” amount in the field, then all boxes should be marked “No” in the additional pop up.

SH in the past three years	
Total Monthly Income *	0 G
Income from Any Source *	No (HUD) G

Monthly Income

Monthly Amount	Source of Income	Start Date *	End Date
	VA Non-Service Connected Disability Pension (HUD)	04/03/2017	

HUD Verification 

HUD Verification: Monthly Income for 04/03/2017

Per Source of Income, the current records for Monthly Income as of 04/03/2017 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 04/03/2017, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
 Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Entry Exit

4 - Assessment Questions

- You know you have answered all of the questions when the **Red** triangle turns to a **Green** checkmark

Income from Any Source * No (HUD)

Monthly Income HUD Verification

	Monthly Amount	Source of Income	Start Date *	End Date
 		VA Non-Service Connected Disability Pension (HUD)	04/03/2017	
 		Worker's Compensation (HUD)	04/03/2017	
 		VA Service Connected Disability Compensation (HUD)	04/03/2017	
 		Unemployment Insurance (HUD)	04/03/2017	
 		TANF (HUD)	04/03/2017	

Showing 1-5 of 15

Non-cash benefit from any source * No (HUD)

Non-Cash Benefits HUD Verification

	Amount of Non-Cash Benefit	Source of Non-Cash Benefit	Start Date *	End Date
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Entry Exit

4 - Assessment Questions

- If the household is in their RRH unit at the time of the project entry, you must complete the “Residential Move-in Date.” It should equal the project date.
- If the household has not moved into their unit at the time of project entry, you must create an Interim Update to update the “Residential Move-in Date.”

The screenshot shows a web application interface with the following elements:

- Navigation:** 'Add' button, 'Showing 1-5 of 8', and navigation buttons 'First', 'Previous', 'Next', 'Last'.
- Domestic violence victim/survivor section:**
 - Field: 'Domestic violence victim/survivor' with a dropdown menu set to 'No (HUD)'.
 - Field: 'If yes for Domestic violence victim/survivor, when experience occurred' with a dropdown menu set to '-Select-'.
 - Field: 'If yes for Domestic Violence Victim/Survivor, are you currently fleeing?' with a dropdown menu set to '-Select-'.
- Outreach section:** A search icon and the title 'Outreach'.
- Table:** A table with columns 'Date of Contact', 'Location', 'Start Date *', and 'End Date'. Below the table is an 'Add' button.
- Date of Engagement and Residential Move-in Date:** Two rows of date pickers. The 'Residential Move-in Date' field is highlighted with a red arrow pointing from the text on the left.
- Bottom navigation:** 'Delete This Shelter Stay', 'Jump to Profile', and a red-bordered box containing 'Save', 'Save & Exit', and 'Exit' buttons.

Save and Exit if there are no other household members. Save if there are additional household member assessments.

Entry Exit

5 - Assessment
Questions for ALL
HOUSEHOLD
MEMEBERS

Click on the Grey box with checkmark for *EACH* Household Member. Complete the **Entry Assessment**. Repeat for all. The box will turn green when completed.

5.

*Follow the screen
from top to bottom
for each
household
member.*

The screenshot displays the ServicePoint interface for client information and assessment. The top section shows a list of household members with columns for Name, Head of Household, Entry Date, Date, Interims, and Ups. Below this is the 'Entry Assessment' section, which includes a 'Select an Assessment' area with several checked options: HUD UDEs (2015), Annual Assessment (2015), VI-SPDAT, HUD CoC and ESG Exit (2015), and HUD CoC and ESG Update (2015). The 'Household Members' section lists five members, each with a checkmark in a grey box. A red box highlights the checkmark for the first member, (12973) Salud, Mariano. A blue arrow points from the text box above to this checkmark. The 'Household Data Sharing' section shows the client name (12973) Salud, Mariano. The 'HUD CoC and ESG Entry (2015)' section contains various fields for data entry, including Date of Birth, Date of Birth Type, Primary Race, Secondary Race, Ethnicity, and Gender.

Name	Head of Household	Entry Date	Date	Interims	Ups
(12973) Salud, Mariano	Yes	09/26/2016			
(12972) Olvera, Alma	No	09/26/2016			
(12974) Olvera, Max	No	09/26/2016			
(12975) Olvera, Yenglee	No	09/26/2016			
(12976) Salud, Dereck	No	09/26/2016			

Include Additional Household Members Showing 1-5 of 5

Entry Assessment

Select an Assessment

HUD UDEs (2015) Annual Assessment (2015) VI-SPDAT

HUD CoC and ESG Exit (2015) HUD CoC and ESG Update (2015)

Household Members

<input checked="" type="checkbox"/> (12973) Salud, Mariano Age: 29 Veteran: No (HUD)
<input checked="" type="checkbox"/> (12972) Olvera, Alma Age: 34 Veteran: No (HUD)
<input checked="" type="checkbox"/> (12974) Olvera, Max Age: 15 Veteran: No (HUD)
<input checked="" type="checkbox"/> (12975) Olvera, Yenglee Age: 12 Veteran: No (HUD)
<input checked="" type="checkbox"/> (12976) Salud, Dereck Age: 7 Veteran: No (HUD)

Household Data Sharing

Client: (12973) Salud, Mariano

HUD CoC and ESG Entry (2015)

Date of Birth* 12 / 18 / 1986

Date of Birth Type* Full DOB Reported (HUD)

Primary Race* Other

Secondary Race: -Select-

Ethnicity* Hispanic/Latino (HUD)

Gender* Male

If Other Gender, specify

“Service Transactions Tab”

Release of Information: March 4, 2011

Client Information

Service Transactions

Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services



Add Referrals



View Previous Service Transactions



View Entire Service History

Use the **Dashboard** to quickly add needs, services or referrals or to view the client's historical records.



In ServicePoint, Clients must have **Needs**’ diagnosed in order for the end user to add services to the record.

View Entire Service History

Client - (12973) Salud, Mariano



(12973) Salud, Mariano

Release of Information: None

-Switch to Another Household Member-

Submit

Client Information

Service Transactions

Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services



Add Referrals



View Previous Service Transactions



View Shelter Stays



View Entire Service History

Service Transactions Tab Layout

Review Historical Transactions!
Navigate **Back to Dashboard**

Client, Training (+)
Release of Information: March 4, 2011

Client Information | **Service Transactions**

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

Previous Needs

Select Dates: Start Date: / / End Date: / /

Provider Creating	Need Status	Amount of Need
Professional Services Training Provider	Identified	
Professional Services Training Provider	In Progress	

Showing 1-2 of 2

Add Service Transactions Using “Add Multiple Services”

Client - (12973) Salud, Mariano 

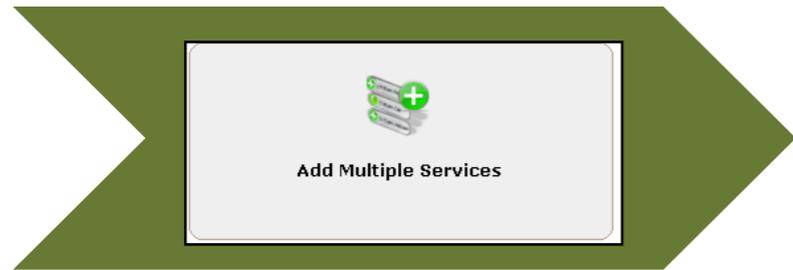
 (12973) Salud, Mariano
Release of Information: **None**

-Switch to Another Household Member-

Client Information **Service Transactions**

Service Transaction Dashboard

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



Add multiple services quickly by automatically diagnosing the **Need** to be the same as the service.

▼ Household Members

Note: To include Household members in these Services, click the box beside each name. Only members from the SAME Household may be selected.

Household #1 Members: Check All Household Members Clear All

Partner, Training

Multiple Services

Note: Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Provider* (1) Professional Services Training

Service Start Date* 03 / 06 / 2010

Service End Date 03 / 06 / 2010

Service List

Number of Services Status -Select- Set All

Number of Services*	<input type="text" value="1"/>
Service	(TP-3350.8000-130) Database Creation/Management Software Selection
Status*	-Select-

Remove Clear

Add Another Remove All Clear All



- Go To Entry/Exit Tab
- Click on Pencil to add Exit Date
- Exit=Date they stop receiving services (discharge)

Client - (23283) Python, Monty

(23283) Python, Monty

Release of Information: None

[-Switch to Another Household](#)

Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

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

Entry / Exit

Program	Type	Entry Date	Exit Date	In
Tabernacle of Faith (283)	HUD	09/27/2016	<input type="text"/>	

[Add Entry / Exit](#)

Showing 1-1 of 1

Exit

- Exit the entire Household
- Complete all Fields
 - Reason for Leaving
 - Destination
- **SAVE & Continue**

Edit Exit Data - (23283) Python, Monty

Household Members

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

- (6626) Male Single Parent**
 - (23284) Python, Andrew
 - (23283) Python, Monty

Edit Exit Data - (23283) Python, Monty

Exit Date *	09 / 27 / 2016    10 : 01 : 03 PM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client, with other ongoing housing subsidy (HUD)
If "Other", Specify	
Notes	
Subsidy	Section 8

Save & Continue Cancel

Exit

/com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=23283

	household	ops	Leaving	
	(23284) Python, Andrew Yes	09/27/2016 09/27/2016	Completed program	Rental by client, with other ongoing housing subsidy (HUD)
	(23283) Python, Monty No	09/27/2016 09/27/2016	Completed program	Rental by client, with other ongoing housing subsidy (HUD)

Include Additional Household Members Showing 1-2 of 2

Entry Assessment Exit Assessment

Select an Assessment

HUD UDEs for All other Projects (2016) Annual Assessment (2016) HUD CoC & ESG Entry All Other Projects (2016) HUD CoC & ESG Exit (2016)

HUD CoC & ESG Update (2016)

Household Members

(23284) Python, Andrew
Age: Unknown
Veteran: No (HUD)

(23283) Python, Monty
Age: 48
Veteran: No (HUD)

Household Data Sharing

Client: (23283) Python, Monty Add Household Data

HUD CoC & ESG Exit (2016) Exit Date: 09/27/2016 10:01:03 PM

Total Monthly Income * G

Income from Any Source * G

Monthly Income HUD Verification

	Monthly Amount	Source of Income	Start Date *	End Date
		Worker's Compensation (HUD)	09/27/2016	
		VA Service Connected Disability Compensation (HUD)	09/27/2016	
		Unemployment Insurance (HUD)	09/27/2016	
		VA Non-Service Connected Disability Pension (HUD)	09/27/2016	
		TANF (HUD)	09/27/2016	

Add Showing 1-5 of 15

Non-cash benefit from any source * G

Non-Cash Benefits HUD Verification

- Make any changes to the HUD COC & ESG Exit
- Based on information at the time of exit.



- Complete “Housing Assessment at Exit and subsequent questions

Both Alcohol and Drug Abuse (HUD) 09/27/2016

Add Showing 1-5 of 8 First Previous Next Last

Outreach

Date of Contact	Location	Start Date *	End Date
Add			

Assessment Disposition -Select- G

If Other Assessment Disposition, specify _____ G

Housing Assessment at Exit -Select- G

If Able to maintain housing at entry, Subsidy Information -Select- G

If Moved to new housing unit, Subsidy information -Select- G

Save Save & Exit Exit

- Save & Exit