
Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 1

Client Search ~ Common Intake ~ Households ~ ROI

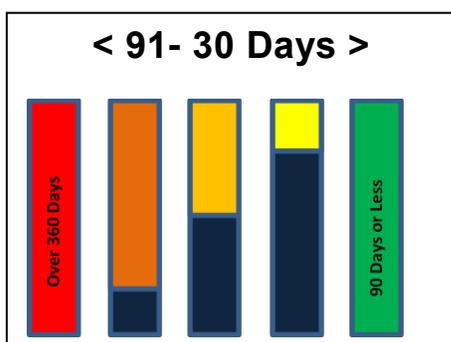


Icon Overview

Icon Overview refers to specific icons that are throughout SENC System.

	ServicePoint Icon	SENC Partner Agency
	Lock Icon	Agency Shared Information
	UnLock Icon	Globally Shared Information
	Edit Icon	Update / Change Current Information
	Delete Icon	Remove entries made in error- ONLY
	View Detail Icon	View Attachements
	Select Icon	Add Selected Information
	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
	Date Selection, Reverse, Current Date Stamp Icon	Enter, clear a date or current date stamp {Date format: mm/dd/yyyy}
	Bed Icon	Shelter Bed Check In

Data Measurement Tool



Client Search- New & Existing Clients

First step is to search if the client has a profile. This process easily access through the ClientPoint search tool. You must always search for a client before entering a new one or add to an existing client profile.

Here are some helpful hints to remember when searching for a client:

- > If you search for both **First** and **Last Name** you will be doing an 'and' search—the client must have both a first name and last name to be found.
- > When searching for a **SS#**, you are searching for the digits that make up that social security number.
- > When you search for a name AND n SS#, the system performs an 'or' search between the Names 'or' the SS#.
- > **In addition to searching for the names you enter, ClientPoint also searches using a "soundex." This means results will be displayed that "sound" like the name you entered. If you want to turn this feature off, select the checkbox to the right of Exact Match. (2)**

1. Click the ClientPoint tab on the navigation toolbar. The screen will display the Client Search screen.

Note: If a client has a [Client ID](#) card, you can simply scan the card using the scanner that is connected to your system. The screen will refresh and the **Client ID** will be entered automatically. (See Figure 1-1) The click Submit to enter client profile. (See Figure 1-4)

The screenshot shows the 'Client Search' form with the following fields and options:

- Name:** First, Middle, Last (containing 'Ban'), Suffix
- Name Data Quality:** -Select-
- Alias:** [Text Field]
- Social Security Number:** [Text Field]
- Social Security Number Data Quality:** -Select-
- U.S. Military Veteran?:** -Select-
- Exact Match:**
- Search ACTIVE Clients:**
- Search INACTIVE / DELETED Clients:**
- Search ALL Clients:**
- Date of Birth:** [Date Picker]
- DOB Data Quality:** -Select-
- Gender:** -Select-
- If Other Gender, specify:** [Text Field]
- Primary Race:** -Select-
- Secondary Race:** -Select- (highlighted with a red line)
- Ethnicity:** -Select-

Buttons: Search, Clear, Add New Client With This Information, Add Anonymous Client

Client Number section:

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

Client ID #: [Text Field] **Submit**

Figure 1-1

2. Simply enter a person's name or any other key data — **Alias, Date of Birth, or SS#** —into the **Search** fields. **(1) & (2)**

Note: When searching for a client- less is more. For example, if you type in last name "Ban". This will avoid duplication if the name(s) were spelled differently during initial intake.

Note: *Secondary Race* is not collected. **Leave blank.**

3. Click **Search** to return a list of possible matches. **(3)** The screen will refresh to show a possible list of matches. (See Figure 1-2)
4. If there is a match, you can type the **Client ID #** directly into the text field, **(4)** —and click **Submit. (5)** To open **Client Profile** screen or click on the **Pencil** icon  next to the name to open prefix. Go **Common Intake** on page 5. (See Figure 1-7)

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
12	Monster, Cookie	***-**-1113	03/03/1987		Male		0
13	Rabbit, Roger	***-**-1114	04/04/1986		Male		0
3	test, Baby		01/02/2010		Male		1
2	test, Just A	***-**-8888	01/01/1976		Transgender		1
10	Trainer, Sioux	***-**-1111	01/01/1988		Female		0
11	Tree, Peach	***-**-1112	02/02/1988		Female	Indefinite	1
16	Tree, Plum		01/01/2001		Male		1

Showing 1 - 7 of 7

Figure 1-2

5. If client's names **DOES NOT** appear in the list, follow 'Adding New Client' process on page 4

Existing Client

Click on the client **Name** or **Edit** icon  next to client name. (See Figure 1-2) The screen will refresh and display the Client Profile screen. Follow *Completing Common Intake* process on page 6.

Adding New Client

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

1. If the search results do not include your client's name, a new client record will need to be created. **(1) & (2)** Enter as much additional information as you have available. **First Name, Middle Name, Last Name, SSN, Alias, and Veteran status** are important because these are the elements that comprise the client's unique ID.

Note: A unique id is assigned to each client to help prevent client duplication in the ServicePoint database.

Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First Bruce	Middle Henry	Last Banner	Suffix	
Name Data Quality	Full Name Reported				
Alias	Green Man; Hulk				
Social Security Number	123	- 85	- 6789		
Social Security Number Data Quality	Full SSN Reported (HUD)				
U.S. Military Veteran?	No (HUD)				
Exact Match	<input type="checkbox"/>				
Search ACTIVE Clients	<input checked="" type="radio"/>				
Search INACTIVE / DELETED Clients	<input type="radio"/>				
Search ALL Clients	<input type="radio"/>				

Date of Birth	06 / 15 / 1970
DOB Data Quality	Full DOB Reported (HUD)
Gender	Male
If Other Gender, specify	
Primary Race	White (HUD)
Secondary Race	-Select-
Ethnicity	Non-Hispanic/Non-Latino (HUD)

Buttons: Search, Clear, Add New Client With This Information, Add Anonymous Client

Client Number

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

Client ID # Submit

Figure 1-3

2. Once you have completed this information, click **Search**. Click **Add Client With This Information**. **(3)** An alert will appear. (See Figure 1-4)

Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First Bruce	Middle Henry	Last Banner	Suffix	
Name Data Quality	Full Name Reported				
Alias	Green Man; Hulk				
Social Security Number	123	- 85	- 6789		
Social Security Number Data Quality	Full SSN Reported (HUD)				
U.S. Military Veteran?	No (HUD)				
Exact Match	<input type="checkbox"/>				
Search ACTIVE Clients	<input checked="" type="radio"/>				
Search INACTIVE / DELETED Clients	<input type="radio"/>				
Search ALL Clients	<input type="radio"/>				

Date of Birth	06 / 15 / 1970
DOB Data Quality	Full DOB Reported (HUD)
Gender	Male
If Other Gender, specify	
Primary Race	White (HUD)
Secondary Race	-Select-
Ethnicity	Non-Hispanic/Non-Latino (HUD)

Buttons: Search, Clear, Add New Client With This Information, Add Anonymous Client

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). Continue with Add New Client?

Ok Cancel

Annotations: 3 points to 'Add New Client With This Information' button, 4 points to 'Ok' button.

Client Number

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

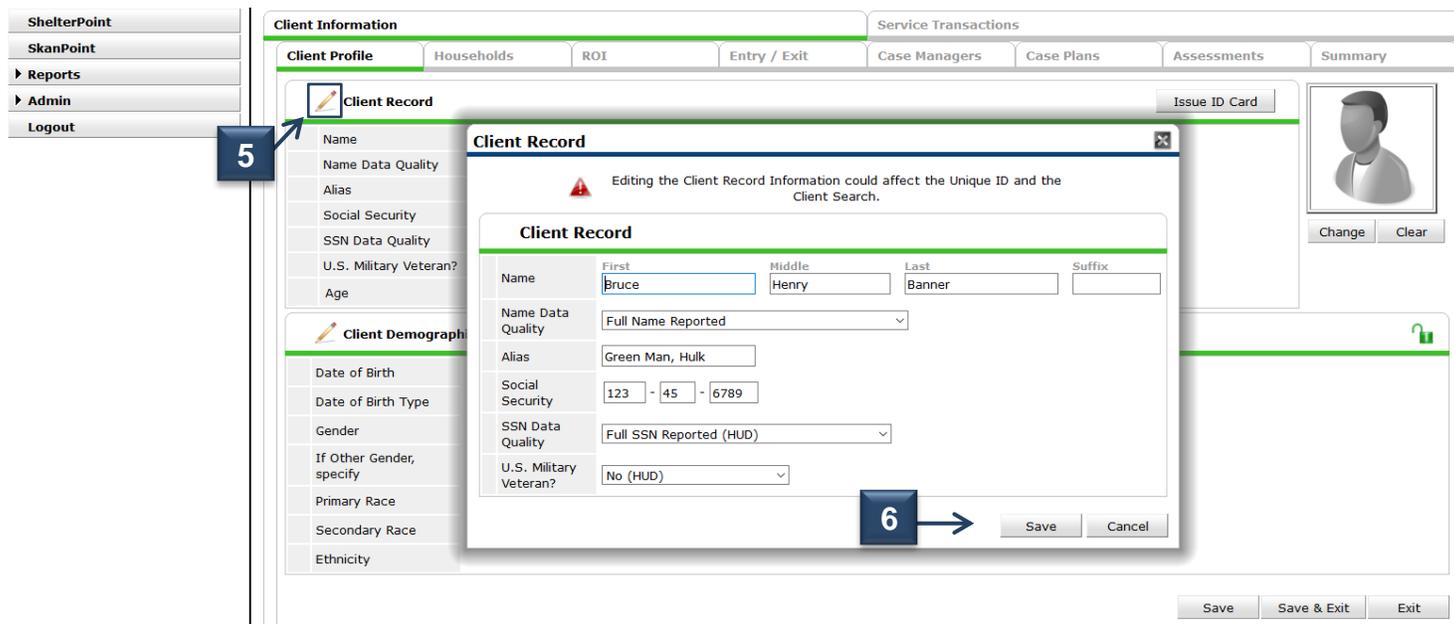
Client ID # Submit

Figure 1-4

3. Click **OK** to continue. **(4)** The screen will refresh and display a new client profile.

The client is now part of SENC

4. Click the **Edit** icon  next to the Client Record. **(5)** A popup box will appear on the screen. (See Figure 1-5) Complete any unanswered questions. Click **Save** to return to the Client Profile screen. **(6)**



Client Information | Service Transactions

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

Client Record

Editing the Client Record Information could affect the Unique ID and the Client Search.

Client Record

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security: - -

SSN Data Quality:

U.S. Military Veteran?:

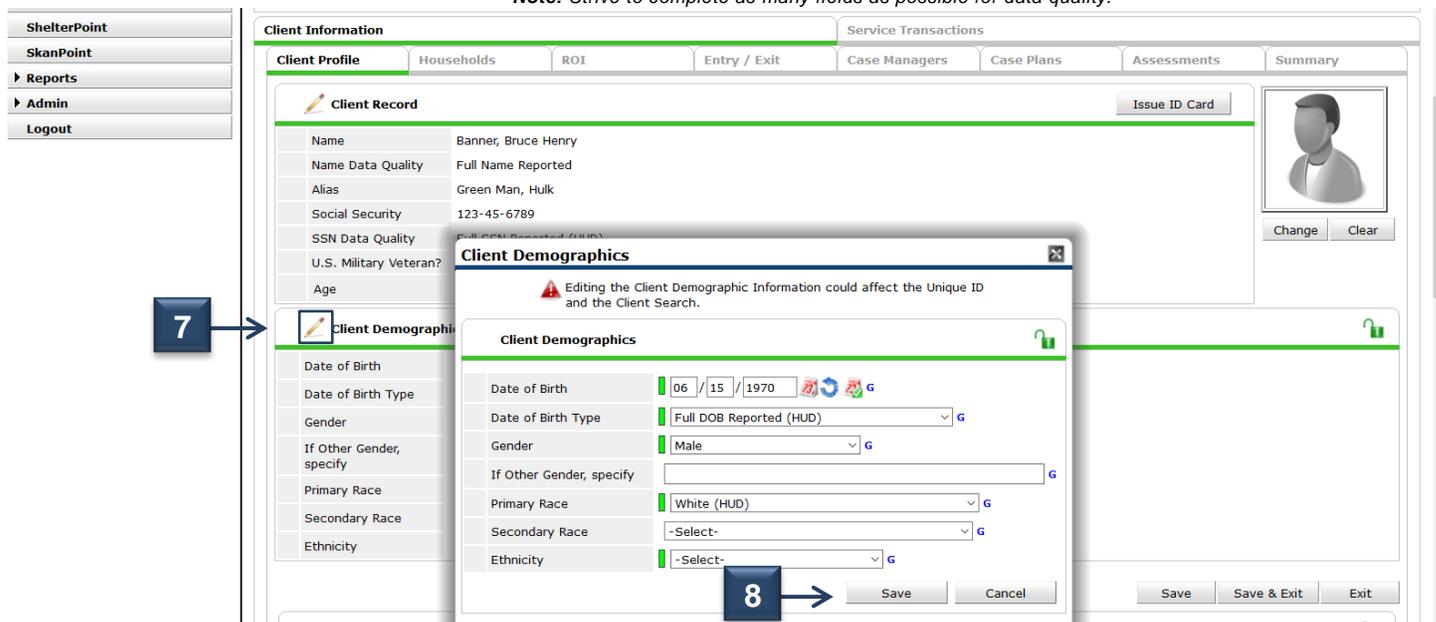
6 → Save Cancel

Save Save & Exit Exit

Figure 1-5

5. Click the **Edit** icon  next to the Client Demographics. **(7)** A popup box will appear on the screen. (See Figure 1-6) Complete any unanswered questions. Click **Save** to return to the Client Profile screen. **(8)**

Note: Strive to complete as many fields as possible for data quality.



Client Information | Service Transactions

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

Client Record

Name: Banner, Bruce Henry

Name Data Quality: Full Name Reported

Alias: Green Man, Hulk

Social Security: 123-45-6789

SSN Data Quality: Full SSN Reported (HUD)

U.S. Military Veteran?

Age

Client Demographics

Editing the Client Demographic Information could affect the Unique ID and the Client Search.

Client Demographics

Date of Birth: / /

Date of Birth Type:

Gender:

If Other Gender, specify:

Primary Race:

Secondary Race:

Ethnicity:

8 → Save Cancel

Save Save & Exit Exit

Figure 1-6

Note: Secondary Race is not required

6. Move to Completing Common Intake on page 6.

Completing Common Intake

The Common Intake is a questionnaire that must be completed **ONLY** for adult clients (18+). This will ensure common and accurate data is shared throughout the SENC. This information is shared among Partner Agencies.

- Once you have completed the Client Record and Client Demographics - scroll down to the *Common Intake (SENC)*. (1) Information previously collected will auto populate. Use drop down arrows – complete questions. (2) (See Figure 1-7)

The screenshot shows the 'Common Intake Form (SENC)' interface. A red box labeled '1' highlights the form title. A blue box labeled '2' points to several dropdown menus: Date of Birth (01/01/1990), Gender (Female), Primary Race (American Indian or Alaska Native (HUD)), Ethnicity (Hispanic/Latino (HUD)), Marital Status (Separated), and Highest Level of Education Attained (11th grade (HUD)). Below these are sections for Address Information, Contact Method, Disabilities, and Employment Information, each with an 'Add' button and a 'No matches' message.

Figure 1-7

Address Information

- Click **Add** in the Client Address Information. (1) A popup box will appear on the screen. (See Figure 1-8) Complete all questions in **bold**. (2) If client is *homeless* – **ONLY** complete Address Type.

* Complete landlord information if available.

The screenshot shows a popup window titled 'Address Information' over a background of the main form. A blue box labeled '1' points to the 'Add' button in the 'Address Information' section of the main form. A blue box labeled '2' points to the 'Address Type' dropdown in the popup. A red dashed box contains the text: 'ALWAYS CLICK - Apply ZIP Code Information This will auto fill information.' The popup form includes fields for Current Status (Yes), Address Type (Both - Physical / Mailing), Street Address (200 N Paul Lane), Apartment / Unit Number (A124), Zip Code (57106), City (Sioux Falls), County of Residence (Minnehaha), State (South Dakota), and Reason for Leaving this Residence (-Select-). It also has fields for Landlord's Name, Address, City, State, Zip Code, and Phone, and a section for Address Date Quality (-Select-), Reported Date (01/18/2017), and Move-Out Date. Buttons for Save, Save and Add Another, and Cancel are at the bottom.

Figure 1-8

Note: **Bold** sections are required. **Non-Bold** sections *if information is available*.

Entering Client Zip Code

1. Enter client zip code in the **Search** field. **(4)** A list of possible matches will appear. **(5)** Select correct match. Click **Apply ZIP Code Information**. **(6)** (See Figure 1-9)

Note: *Apply ZIP Code Information* populates the **City**, **State**, and **County/Parish** fields after a ZIP code is entered.

The screenshot shows the 'Address Information' form. The 'Zip Code' field contains '57106'. A dropdown menu is open below it, showing two options: 'Sioux Falls, SD 57106' and 'Sioux Falls (Shindler), SD 57106'. A blue box highlights the 'Apply ZIP Code Information' button to the right of the dropdown. Numbered callouts are present: '4' points to the 'Zip Code' field, '5' points to the dropdown menu, and '6' points to the 'Apply ZIP Code Information' button.

Figure 1-9

2. Zip Code Confirmation popup box will appear. Use the drop down arrow to change City or County/Parish- if necessary. **(7)** Click **Yes** to confirm information. **(8)** (See Figure 1-10)

The screenshot shows the 'Address Information' form with a 'ZIP Code Confirmation' popup box overlaid. The popup contains the following information: 'Is the following ZIP Code information correct?', 'ZIP Code: 57106', 'City: Sioux Falls', 'State: South Dakota', and 'County/Parish: Minnehaha, SD'. At the bottom of the popup are 'Yes' and 'No' buttons. A blue box highlights the 'Yes' button. Numbered callouts are present: '7' points to the 'Yes' button, and '8' points to the 'Yes' button.

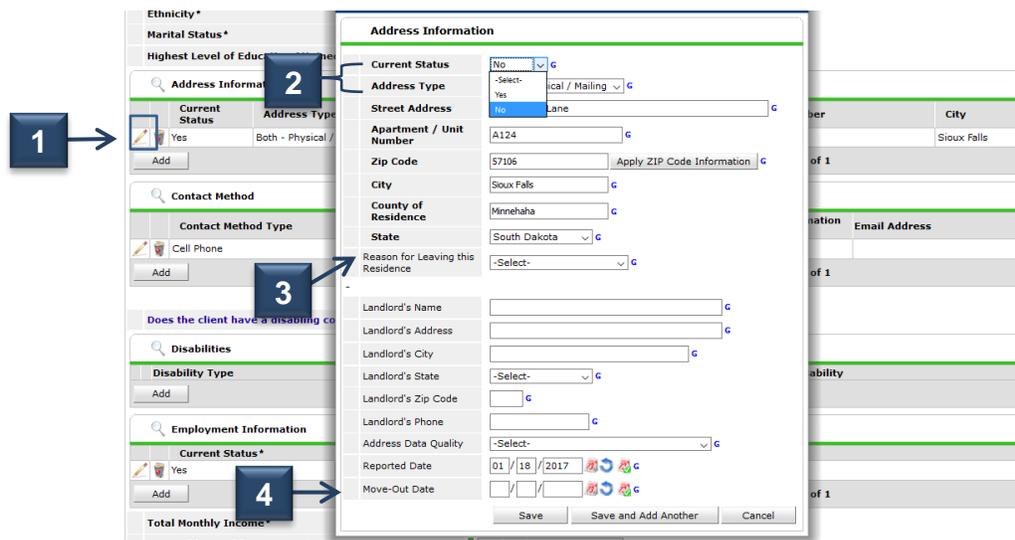
Figure 1-10

3. Once the address information is complete- Click **Save** to exit screen or **Save and Add Another** to add an additional address. Click **Cancel** to return without saving changes.

Changing Address Information

REQUIRED -- CHANGE CURRENT STATUS TO NOT ON OLD ADDRESS – WHEN ADDING NEW.*

1. Click the **Edit** icon  next to the address that is no longer current. **(1)** Select Current Status & Address Type **(2)**
If Current Status is: **NO** – Update -- Reason for Leaving this Residence- select from one of the options. **(3)**
Enter Move-Out date. **(4)** (See Figure 1-11)



The screenshot shows the 'Address Information' form with the following fields and values:

- Current Status:** No
- Address Type:** No
- Street Address:** A124
- Apartment / Unit Number:** A124
- Zip Code:** 57106
- City:** Sioux Falls
- County of Residence:** Minnehaha
- State:** South Dakota
- Reason for Leaving this Residence:** -Select-
- Landlord's Name:** (empty)
- Landlord's Address:** (empty)
- Landlord's City:** (empty)
- Landlord's State:** -Select-
- Landlord's Zip Code:** (empty)
- Landlord's Phone:** (empty)
- Address Data Quality:** -Select-
- Reported Date:** 01 / 18 / 2017
- Move-Out Date:** (empty)

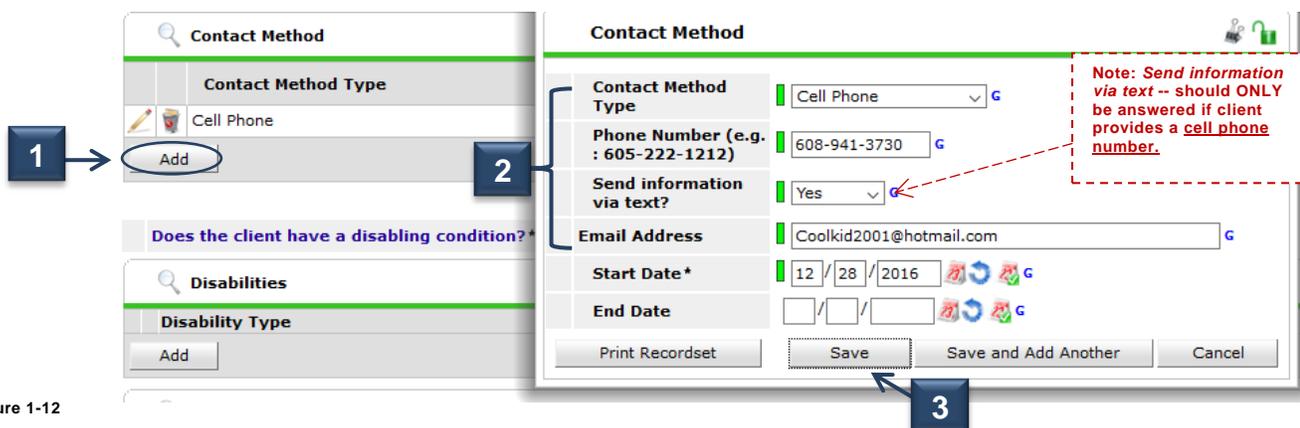
Figure 1-11

2. Click **Save** or **Save and Add Another** to add the new address.

Adding Contact Method **** REQUIRED – PHONE NUMBERS MUST INCLUDED DASH(S) ****

1. Click **Add** in the Contact Method section. **(1)** A popup box will appear on the screen. (See Figure 1-12) Use drop down arrow to complete information. **(2)** Click **Save** to return to the Client Profile screen. **(3)**

Note: If client does not have a phone – Select **No Phone**



The screenshot shows the 'Contact Method' form with the following fields and values:

- Contact Method Type:** Cell Phone
- Phone Number (e.g. : 605-222-1212):** 608-941-3730
- Send information via text?:** Yes
- Email Address:** Coolkid2001@hotmail.com
- Start Date*:** 12 / 28 / 2016
- End Date:** (empty)

Note: Send information via text -- should ONLY be answered if client provides a cell phone number.

Figure 1-12

3. Click **Save** or **Save and Add Another** to add a new Contact Method.

Changing Client Contact Method

****REQUIRED – ENTER END DATE WHEN CONTACT METHOD IS NO LONGER ACTIVE****

1. Click the **Edit** icon  next to the Contact Method Type to change or update information. **(1)** A popup box will appear on the screen. (See Figure 1-13) If contact information is no longer current - Enter End Date. **(2)**

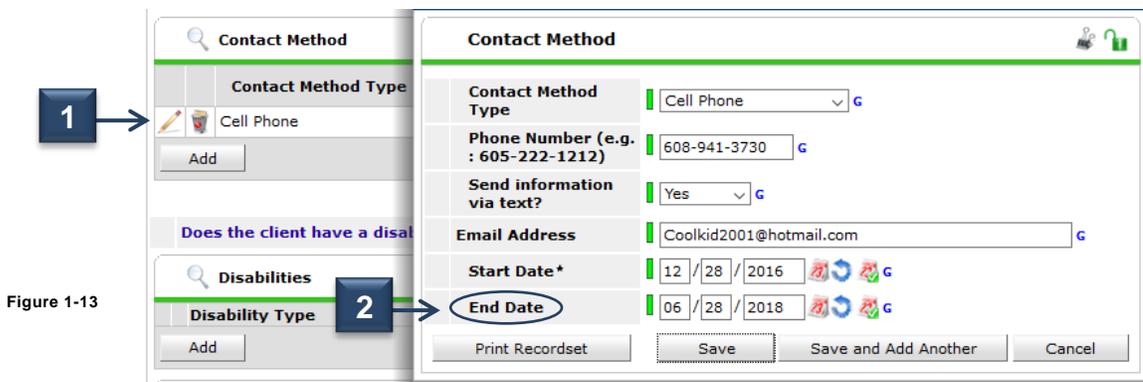


Figure 1-13

2. Click **Save** or **Save and Add Another** to add new contact information.

Disabilities

1. Use the drop down arrow to complete Disabling Condition question. (See Figure 1-14) **(1)** Select the appropriate response. If **yes** - Click **Add** in the Disabilities Type section. **(2)** Go to step 2. **For all other responses, follow Employment Information process on page 9.**

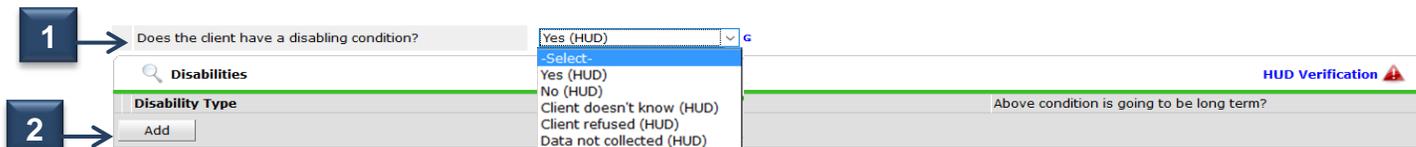


Figure 1-14

2. Once you have clicked **Add**. A popup box will appear on the screen. (See Figure 1-15) Select the **Disability Type** that best fits the client. **(3)** Complete all questions in **bold** and Non-Bold sections *if information is available*. **(4)**

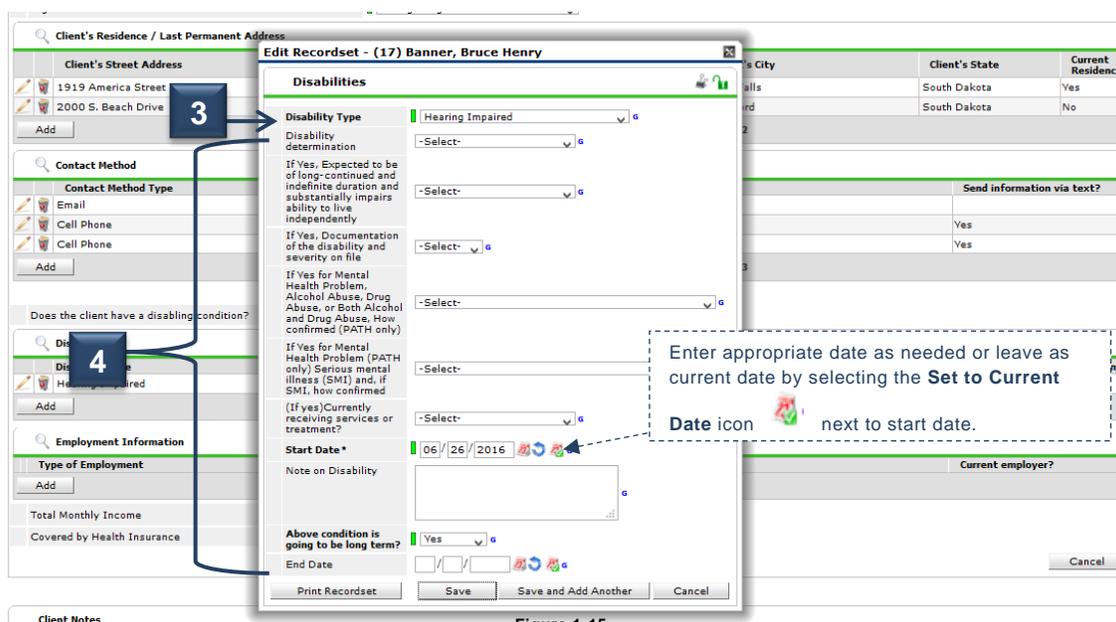


Figure 1-15

3. Click **Save** or **Save and Add Another** to add new Disability.

Employment Information

1. Click **Add** in the **Employment / Income Information (Retired, SSDI, all income sources)** section. (1) A popup box will appear on the screen. (See Figure 1-16) Complete all questions. (2)

Employment / Income Information (Retired, SSDI, all income sources)

Reported Date	Current Status	Type of Employment	Employer Name	Employment End Date	Overall Total Monthly Income
04/20/2017	Yes	Full Time	Mernards		US\$2,200.00
03/29/2017	No	Full Time	Sioux Falls Ford		US\$1,500.00

Showing 1-2 of 2

1 → Add

Health Insurance

Covered by Health Insurance* Yes (HUD) G

Cancel

Figure 1-16

2 →

Employment / Income Information (Retired, SSDI, all income sources)

Reported Date 05 / 24 / 2017 G

Employment

Current Status -Select- G

Type of Employment -Select- G

Employer Name G

Employment End Date G

Income (Retired, SSDI, all income sources)

Overall Total Monthly Income G

Save Save and Add Another Cancel

Figure 1 - 16A

Note: "Income" does not

3. Click **Save** or **Save and Add Another** to add new Employment information.

Changing Employment Information

REQUIRED -- CHANGE CURRENT STATUS ONLY to NO

DO NOT change past information- ALWAYS add new

1. Click the **Edit** icon  next to the employment that is no longer current. **(1)** Change *Current Status*– **No** **(2)** Enter End date. **(3)** (See Figure 1-11)



Figure 1-17

2. Click **Save and Add Another** to add new Employment information or Income amount. **(4)** **If only updating income amount – add new entry.** (See Figure 1-17)

(e.g. If a client is on SSDI in June – making **\$700.00** THEN he comes back in July still receiving SSDI but now making **\$450.00**. We will want to add a new entry for the new recorded income. Even though his source of income did not change- the dollar amount did)

Health Insurance

1. Select from the drop down box to reflect the clients Health Insurance status.



Figure 1 – 18

Note: "Covered by Health Insurance" includes: Medicaid, Medicare, Affordable Care Act, Private Insurance, and Military

Client Notes ****Do not delete Client Notes always enter NEW Client Note****

1. Click the **Add New Client Note** in the Client Notes section. (1) A popup box will appear on the screen. Enter client information that is valuable to process of serving the client. (2) Click **Save**. **Client Notes are shared Globally.**

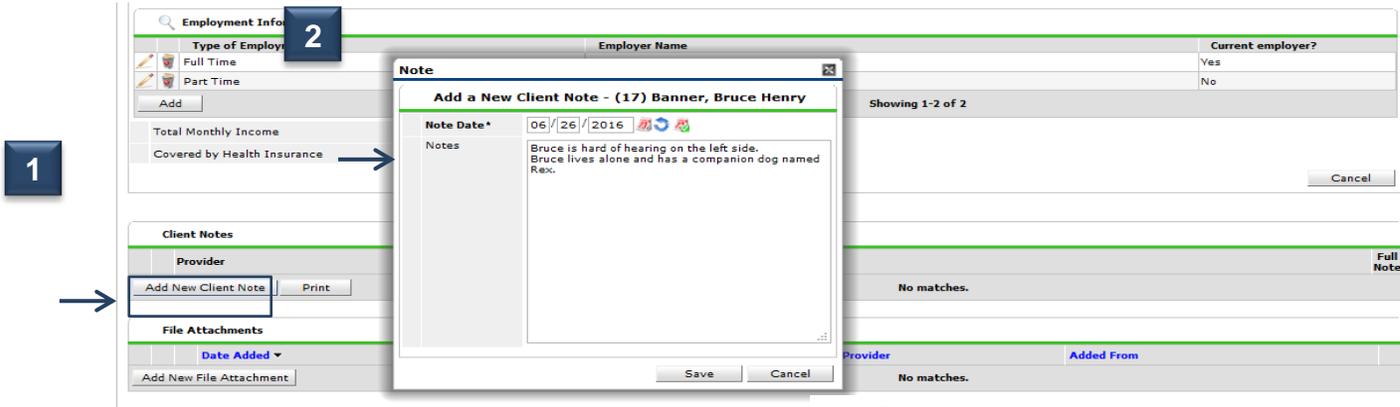
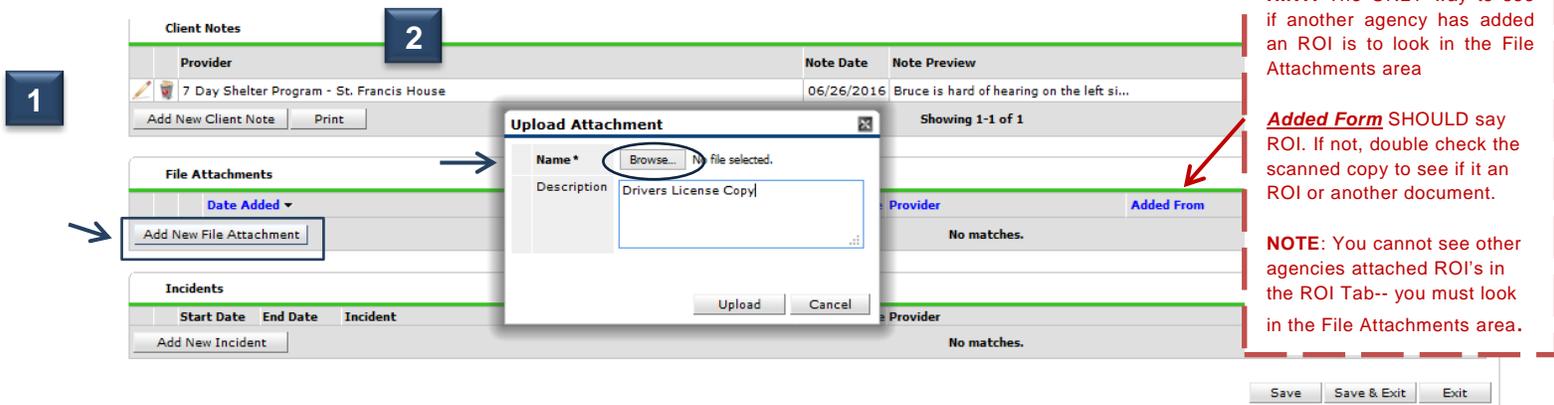


Figure 1-19

2. Click the **Edit** icon  to edit a Client Note. Click **Save** to exit. *If necessary* - Click **Print** to print copy of the Client Note.

File Attachments **** DO NOT ADD ROI IN THIS AREA --- ALWAYS USE ROI TAB****

1. Click the **Add New File Attachment** in the File Attachment section. (1) A popup box will appear on the screen. Enter Description of file. Click **Browse**. (2) Attached the file from your computer. Click **Upload**. **File Attachments are shared Globally.**



2. Click **Upload** to add file. Click **Cancel** to return to the previous screen without retaining the changes.

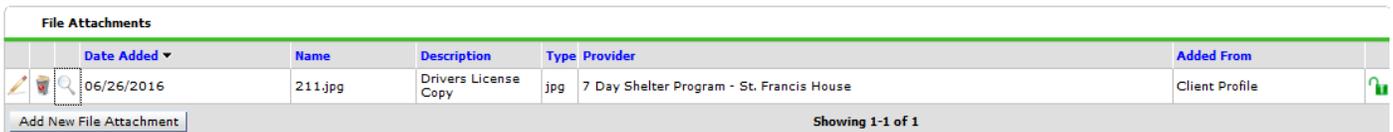


Figure 1-20

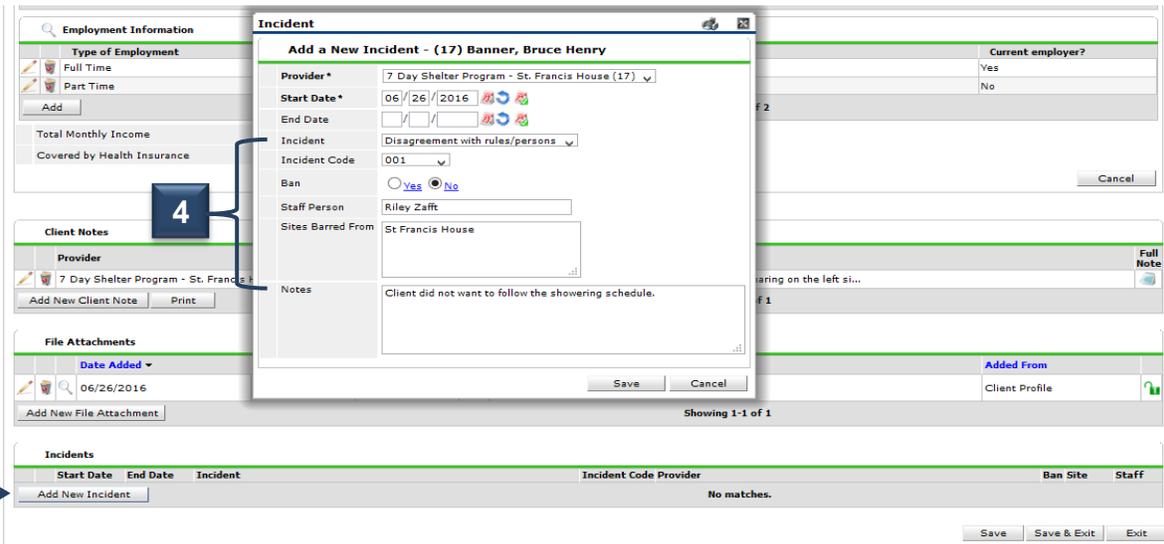
3. Once the file has been uploaded to the File Attachments section you can see the attachment by clicking the **View** icon .

- Click the **Edit** icon  to edit the description if necessary.

Incidents ****ONLY USED IF SAFETY IS A CONCERN****

- Click the **Add New Incident** in the Incidents section. **(3)** A popup box will appear on the screen.
- The **Provider** will default to the user's current provider. The **Start Date** default to the current date.
- Select the type of **incident** and **Incident Code** (if necessary) from the drop down box. Enter **Staff name**, **Site Barred From** and add **Notes** to include further information regarding the Incident. **(4) Incidents are shared Globally.**

Figure 1-21



The screenshot shows a software interface with a central popup window titled "Add a New Incident - (17) Banner, Bruce Henry". The popup contains the following fields:

- Provider***: 7 Day Shelter Program - St. Francis House (17)
- Start Date***: 06/26/2016
- End Date**: [Empty]
- Incident**: Disagreement with rules/persons
- Incident Code**: 001
- Ban**: Yes No
- Staff Person**: Riley Zafft
- Sites Barred From**: St. Francis House
- Notes**: Client did not want to follow the showering schedule.

Below the popup, the main interface shows the "Incidents" section with a table:

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
Add New Incident						
No matches.						

Annotations: A blue box with the number "3" points to the "Add New Incident" button in the Incidents section. A blue box with the number "4" points to the "Notes" field in the popup.

- Click **Save** to exit screen

Client Households

Creating a household is an easy way to assign services to a group of people. Households are typically configured in family units with one person as the head of the household. When other members are added to the household, they are identified by their relationship to the Head of Household. Creating a household makes it faster and easier to record data in *ServicePoint*. By grouping client records together the user may update or provide services, enter a Release of Information (ROI), or create an entry for all household members in one action, thereby eliminating the need to individually create entries for each member receiving services.

First step is to search if the client is part of an existing household. This process can be easily accessed through the Household tab. You must always search for an existing household before entering a new one or adding to an existing household.

1. Click the Households tab. **(1)** the screen will display two options – Search Existing Households or Start New Household.
2. Click **Search Existing Household**. **(2)** Use keywords for Client Names, Client ID #, or Full Social Security Numbers of Clients already in a Household —into the **Search** field. **(3)**

Note: When searching for a client- less is more. For example, if you type in last name "Ban". This will avoid duplication if the name(s) were spelled differently during initial intake.

The screenshot shows the ClientPoint interface with the following elements:

- Client Profile:** Client - (17) Banner, Bruce Henry. Release of Information: None.
- Household Search Dialog:** Search for a Household by using keywords for Client Names, Client ID, or Social Security Numbers of Clients already in a Household. Search field contains "Ban". Results table shows one match: Household ID (with a green plus icon), Type: Female Single Parent, Head of Household: test, Just A, Client Count: 2 (with a magnifying glass icon).
- Current Clients Dialog:** Household Members table:

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(2) test, Just A	40	Yes	Self	04/18/2016	0	1
(3) test, Baby	6	No	Son	04/18/2016	0	1

Figure 1-22

3. Click **Search** to return a list of possible household matches. **(4)** The screen will refresh to show a possible list of household matches. (See Figure 1-22)
4. If there is a match, you can click **View** icon to view the clients in that specific household **(5)** Click **Exit** to return to Household Search screen.
5. To open **Client Profile** screen click **Select** icon next to the name to open prefix.

Creating a New Household

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

1. If the search results do not include your client's name or household, a new client household will need to be created. (1) Click **Add NEW Household**. The *Add New Household* popup box will appear. Go to step 2.

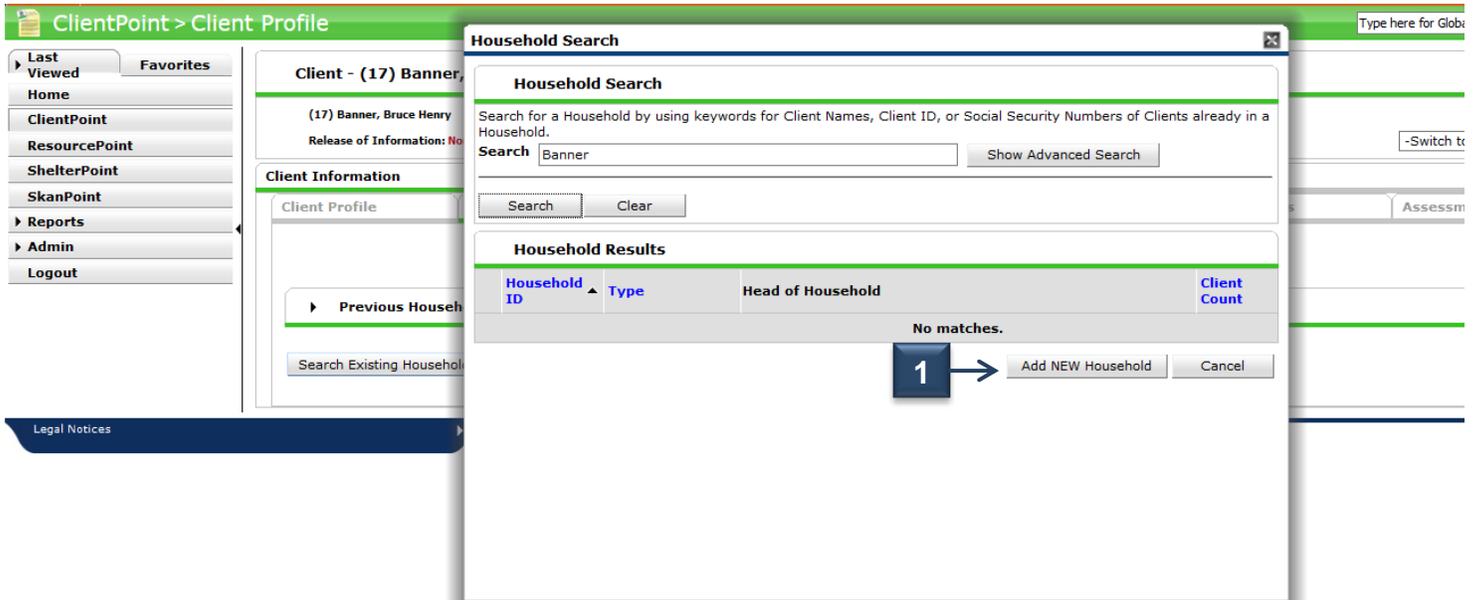


Figure 1-23

2. Select a **Household Type** from the pick list. (2) Your Client's name should appear at the bottom of the screen. (3) Click **Continue**. The Household Information popup box will appear. (See Figure 1-24)

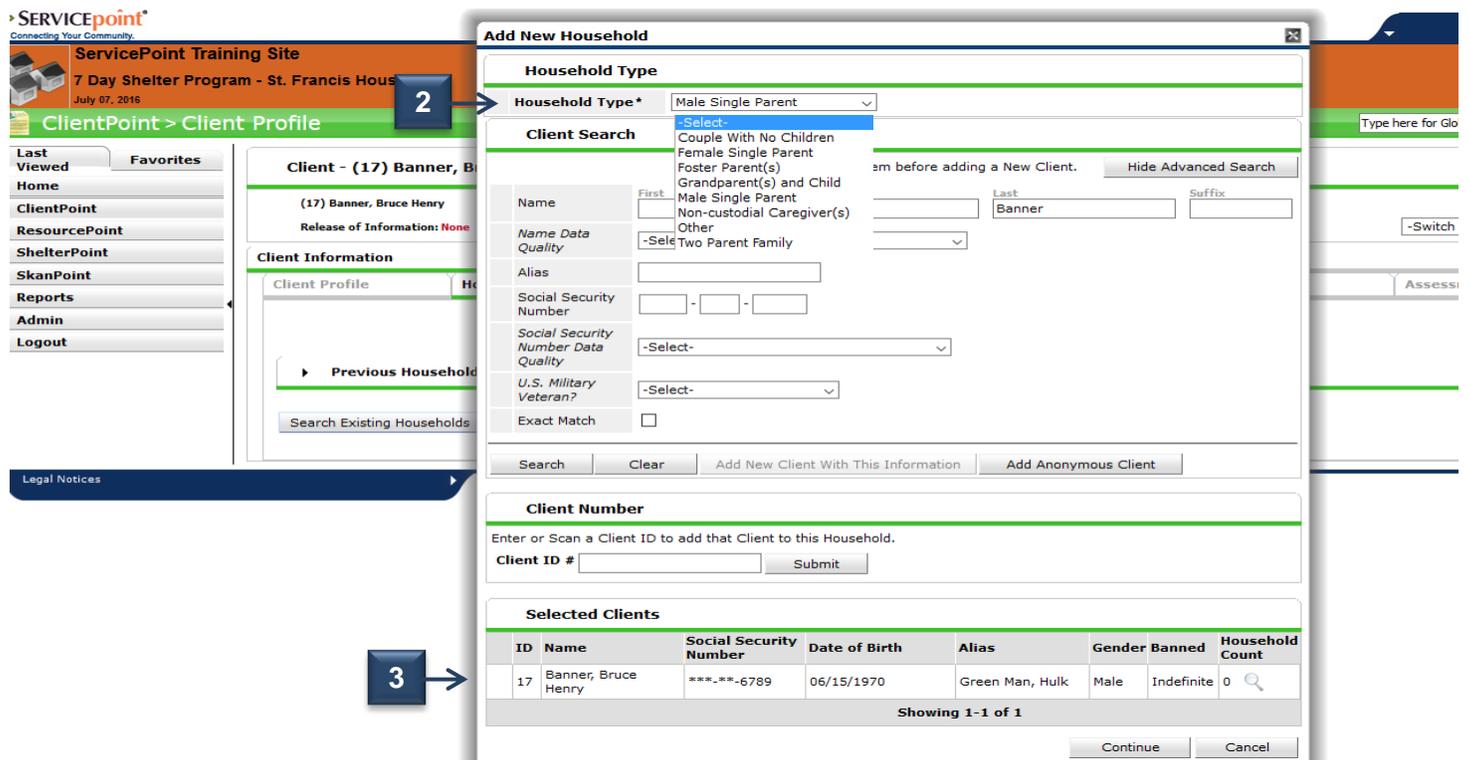


Figure 1-24

- Set the **Head of Household** indicator. **(4)** If this client is Head of Household, select **Yes**, otherwise select **No**.
- Select **Relationship to Head of Household** from the pick list. **(5)** Complete **Date of Birth, Gender, and Relationship to Head of Household** in the *Household Information* area. **(6)** (See Figure 1-25)
- The **Joined Household** defaults to the current date. **(7)** This is the date the client will be entered into the household. *It is a required field.*
- Click **Save** and Click **Exit**. The user will be returned to the **Household Overview** screen. The newly added Household will display. (See Figure 1-25)

Note: The Head of Household field defaults to "No." The field need only be altered for the Head of Household.

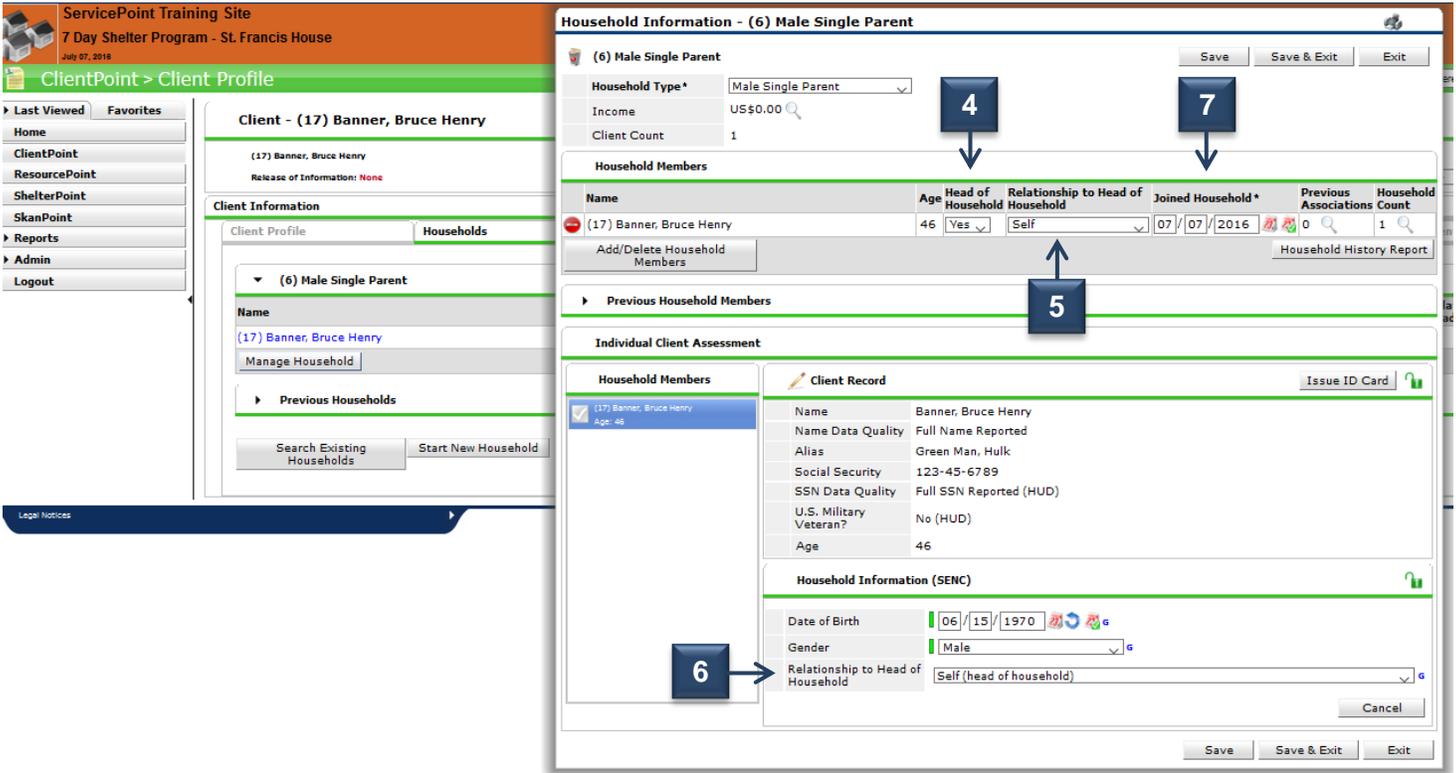
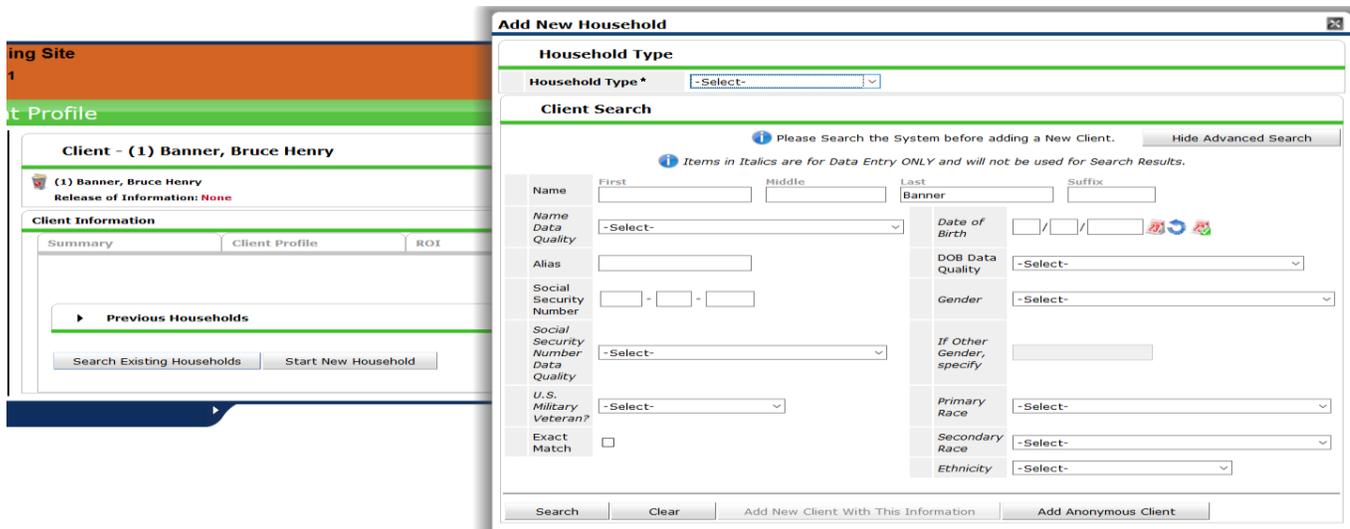


Figure 1-25

Adding Minor (Child) to Existing Household

Adding a minor into SENC – **ONLY** collect: full legal name, date of birth, gender

- Click Households > Click *Search Existing Households* > Enter minors name > Click Search > Enter *Household Type*.
If Minor is not in the system – Click Add Client With This Information > Confirmation textbox will appear > Click Okay.



Add Adult Client to Existing Household

Always remember to check for duplication before adding new client. If no matches are found, then you can enter a new client. Complete the following steps to add a client:

1. Click **Manage Household** on the Household Overview screen. (1) The Household Information popup box will appear. Click **Add/Delete Household Members**. (2) The **Add/ Delete Household Members** screen will appear. (See Figure 1-26)

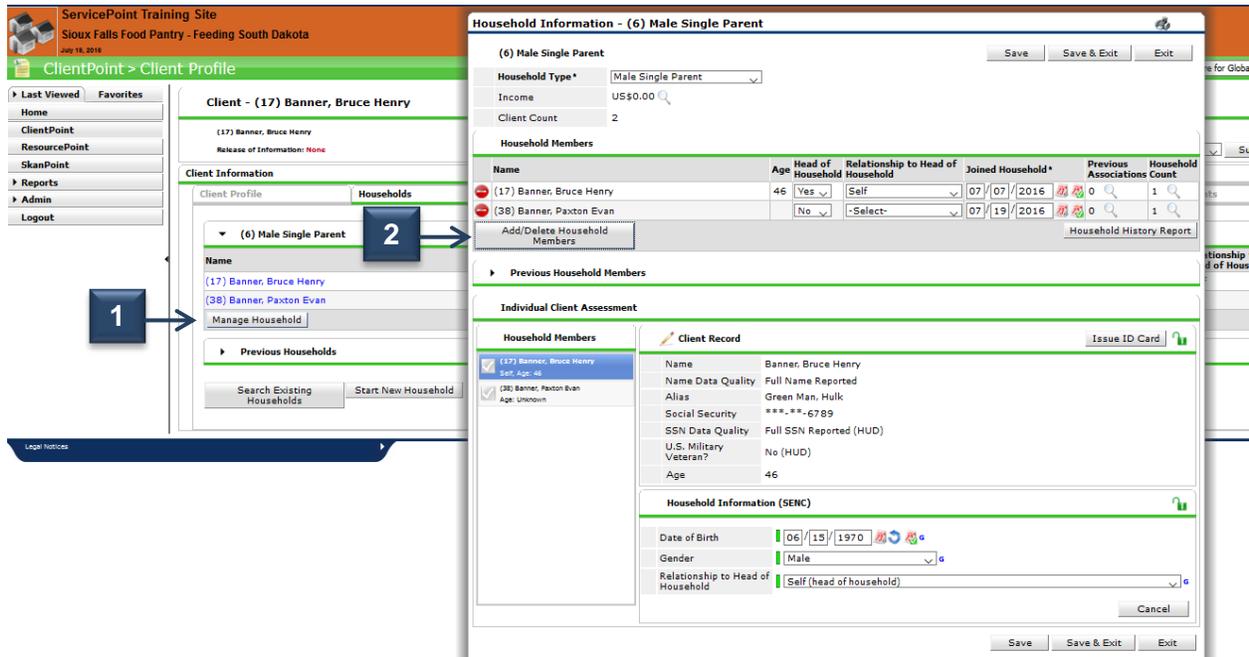


Figure 1-26

2. Click the drop down arrow next to **Add Clients to the Household**. (3) Search for an existing client. Follow **Client Search-New & Existing Clients** process on page 3. Click **Search**.
3. To select the client click the **Add** icon (+). (4) This will move the client to the **Selected Clients** area. (5) Click **Continue** to return to the Household Information screen. (See Figure 1-27)
 - a. If the client you are searching for does not appear in the **Client Results** – follow **Adding New Client** process on page

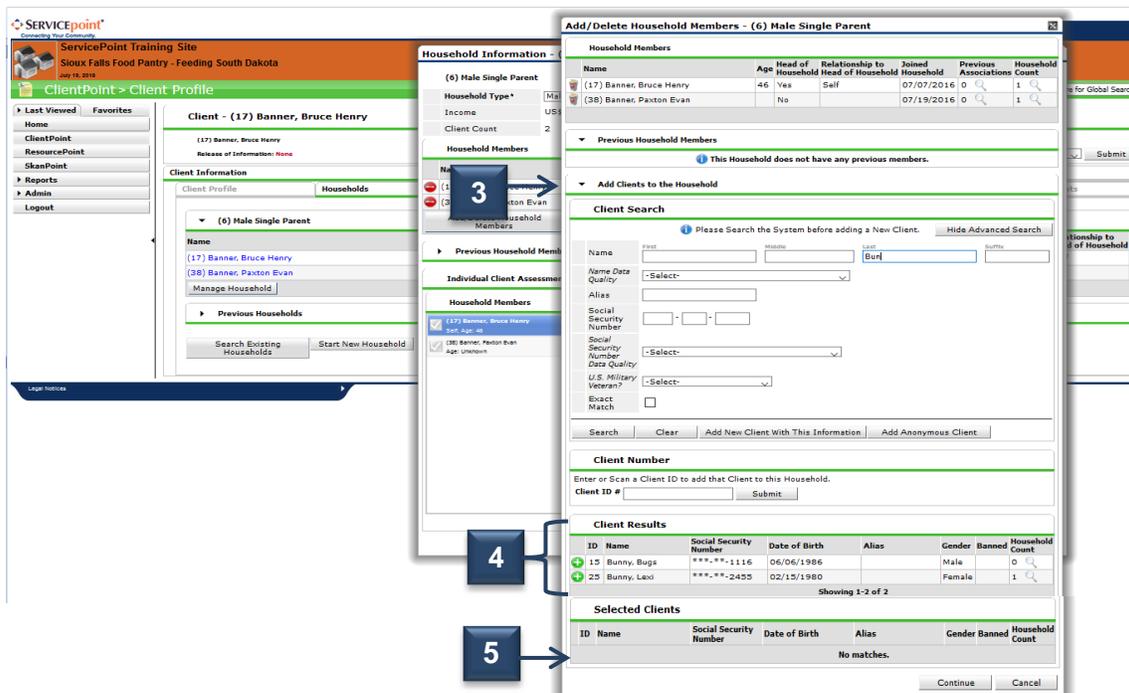


Figure 1-27

4. The *Household Information* screen will appear. Set the **Head of Household** indicator. If this client is Head of Household, select **Yes**, otherwise select **No**. Select **Relationship to Head of Household** from the pick lists. If the client is the Head of Household, select **Self**. **(6)** Complete **Date of Birth**, **Gender**, and **Relationship to Head of Household** in the Household Information area. **(7)** Click **Save & Exit** to return to the Client Information screen.
5. The **Joined Household** defaults to the current date. **(8)** This is the date the client will be entered into the household. *It is a required field.*
6. Click **Save** and Click **Exit**. The user will be returned to the **Household Overview** screen. The newly added household will display. (See Figure 1-25)

ServicePoint
Connecting Your Community

ServicePoint Training Site
Sioux Falls Food Pantry - Feeding South Dakota
July 18, 2016

ClientPoint > Client Profile

Last Viewed Favorites

Home
ClientPoint
ResourcePoint
ScanPoint
Reports
Admin
Logout

Client - (17) Banner, Bruce Henry
Release of Information: None

Client Information

Client Profile Households

(6) Male Single Parent

Name
(17) Banner, Bruce Henry
(38) Banner, Paxton Evan
Manage Household

Previous Households

Search Existing Households Start New Household

Legal Notices

Note: Click the Remove icon to remove existing clients from household.

Household Information - (6) Male Single Parent

(6) Male Single Parent

Household Type* Male Single Parent

Income US\$0.00

Client Count 3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household*	Previous Associations	Household Count
(17) Banner, Bruce Henry	46	Yes	Self	07/07/2016	0	1
(38) Banner, Paxton Evan	4	No	Son	07/19/2016	0	1
(25) Bunny, Lexi	36	No	Wife	07/19/2016	0	2

Add/Delete Household Members Household History Report

Previous Household Members

Individual Client Assessment

Household Members

<input checked="" type="checkbox"/>	(17) Banner, Bruce Henry Sex: Age: 46
<input checked="" type="checkbox"/>	(38) Banner, Paxton Evan Son, Age: 4
<input checked="" type="checkbox"/>	(25) Bunny, Lexi Wife, Age: 36

Client Record

Name Bunny, Lexi
Name Data Quality Full Name Reported
Alias
Social Security ***-**-2455
SSN Data Quality Full SSN Reported (HUD)
U.S. Military Veteran? Yes (HUD)
Age 36

Household Information (SENC)

Date of Birth 02/15/1980
Gender Female
Relationship to Head of Household Self (head of household)

Save Save & Exit Exit

Figure 1-25

An existing client is now part of an existing household

Removing Existing Client From Household

****These steps below will remove a Client from the Household you will no longer be able to associate them with Household information including Goals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date. ****

1. To remove client from an existing household. Click **Manage Household** on the Household Overview screen. (1) The Household Information popup box will appear. Click the **Remove icon** next to the client you would remove. (2)
2. Client Left Household popup box will appear. (See Figure 1-26) *Date Client Left Household* will default to the current date. Click **Save**. (3)
3. The removed client will now appear in the Previous Household Members area in the **Add/Delete Household Members** section.

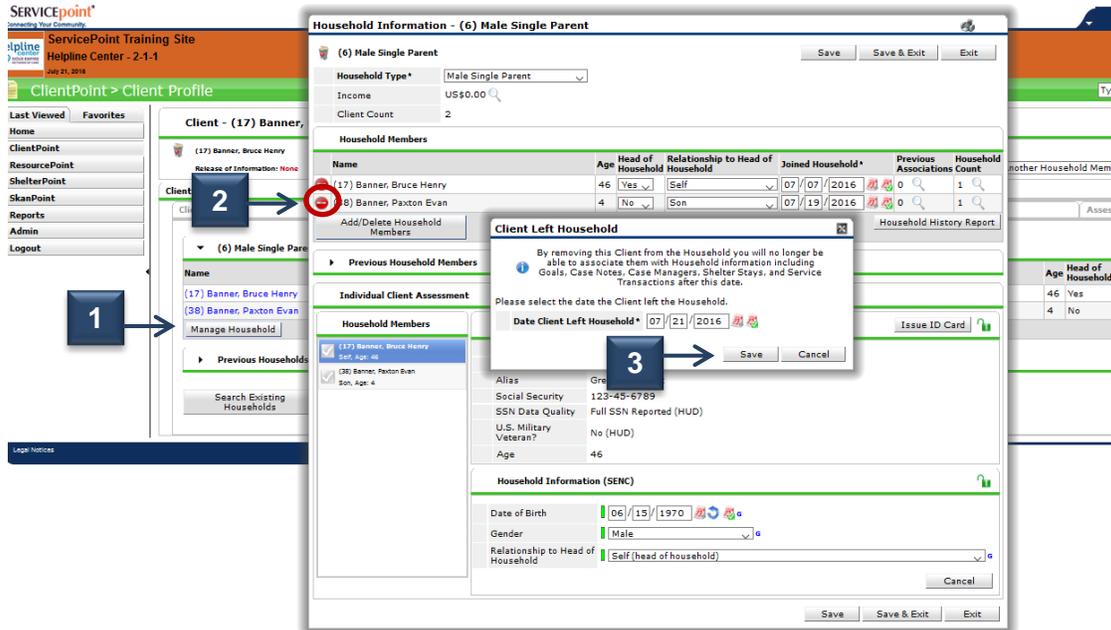


Figure 1-26

**** These steps below will delete this Client's Association with the Household COMPLETELY.**

4. If client was added to household in error. Click **Add/Delete Household Members**. In the **Previous Household Members** area - **click** the trash icon next to the client's name. (4) This will delete the client's relationship to that household. Delete Household Relationship popup box will appear. (See Figure 1-27) Click **Delete**.(5)

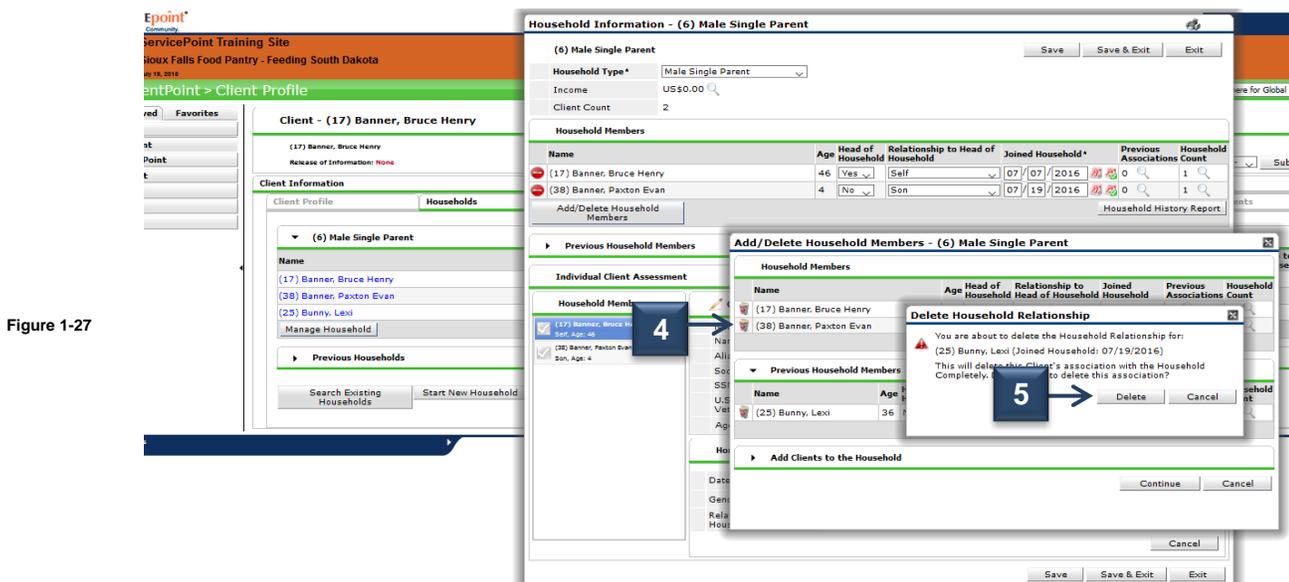


Figure 1-27

Adding a Release of Information (ROI)

****Each Adult Client MUST sign an ROI****

- Search for and select a client in *ClientPoint*. (See page 3) or click [Client Search- New & Existing Clients](#). Click the **ROI** tab to display the **Release of Information** area. (1) Click the **Add Release of Information**. (2) The Release of Information popup box will appear.
- Household Member Section:** Each adult (18+) household member must sign a separate ROI. Each ROI must be attached to an individual household member; this will require you to scan and attach the signed ROI in each Client Profile.
 - For minor household members (17 years of age and younger) **DO NOT check the box(s)**.
- In the **Release of Information Data** area – **Provider*** will default to the current provider. Complete **Release Granted**. The **Start Date** will default to current date. Complete **End Date** – always enter: **01/01/2099**. (4) Select from the **Documentation** picklist. (5) Click **Save Release of Information** to return to Client Information screen. (See Figure 1-28)

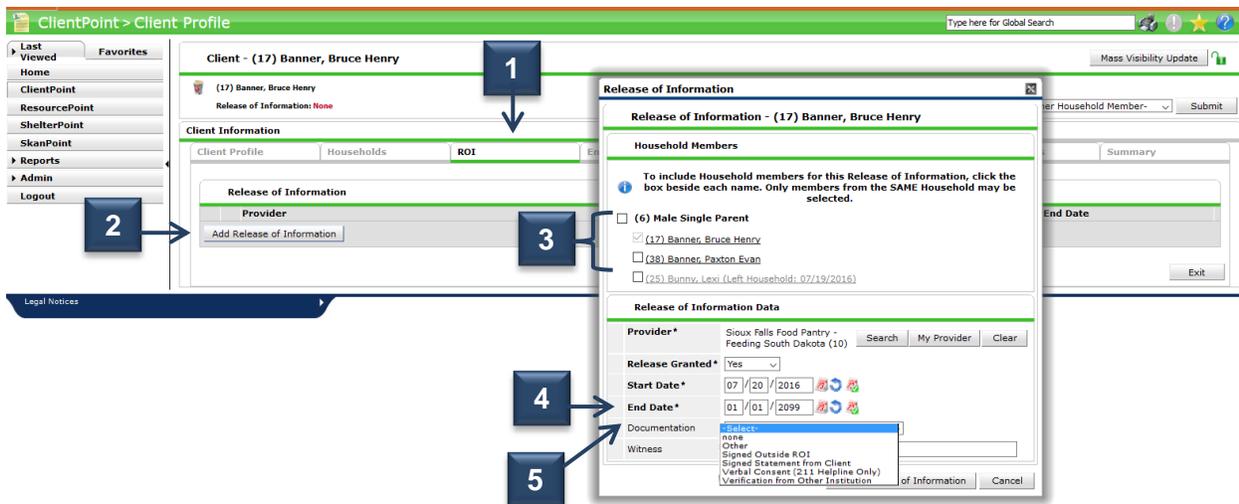


Figure 1-28

- Click the **Trash** icon  to remove the **Release of Information** from the client. Click the **Edit** icon  to alter the **Release of Information**. (6) Click **Add Release of Information** to add a new **Release of Information**. (7) Click the file attachment icon  to add an attachment to the ROI. (8) This will open the File Attachment window. (See Figure 1-29)

Notice: The file attachment icon updates to show how many attachments are associated with each ROI.

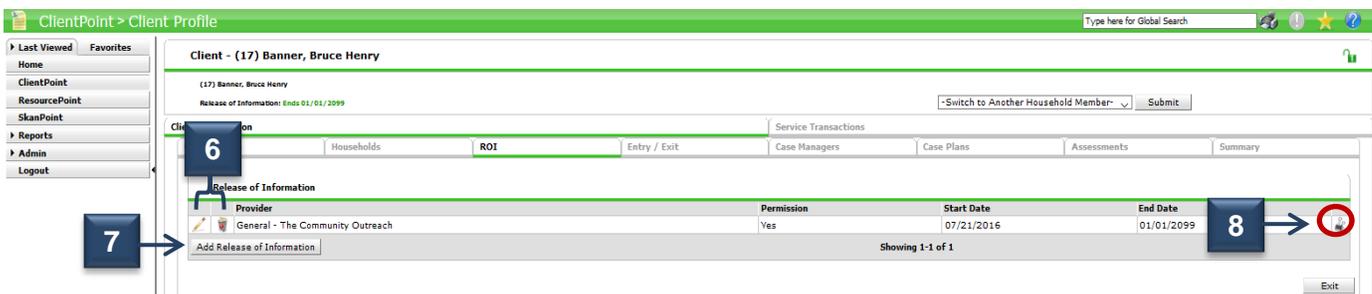


Figure 1-29