# 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.

٢	SerivcePoint Icon	SENC Partner Agency
49	Lock Icon	Agency Shared Information
ſu	UnLock Icon	Globally Shared Information
1	Edit Icon	Update / Change Current Information
1	Delete Icon	Remove enteries made in error- ONLY
0,	View Detail Icon	View Attachements
•	Select Icon	Add Selected Information
٩	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
<u>A</u> S A	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 <u>Client ID</u> 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)

Last Viewed Favorites	Client Search			
Home		Dece Course the System before addin	a a New Client	
ClientPoint		U Please Search the System before adding	g a New Clienc.	
Resourceroine		🕕 Items in Italics are for Data Entry ONLY and will not	be used for Search Results.	
▶ FundManager	Name	First Middle Last Suffix		
ShelterPoint				
ActivityPoint	Name Data Quality	-Select-	Date of Birth	//
SkanPoint	Alias		DOB Data Quality	-Select-
Reports	Social Security Number		Gender	-Select-
Admin	Social Security Number Data Quality	-Select- 2	If Other Gender, specify	
Logout	U.S. Military Veteran?	-Select-	Primary Race	-Select- ~
	Exact Match		Secondary Race	-Salact-
	Search ACTIVE Clients	•	Ethnicity	-Select-
	Search INACTIVE / DELETED Clients	0		
	Search ALL Clients	0		
3 →	Search Clear Add Ner	w Client With This Information Add Anonymous Client		
	Client Number			
4	Enter or scan a Client ID number to go direct	y to that Client's profile. Submit 5		



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-
- 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 *L* next to the name to open prefix. Go <u>Common Intake</u> on page 5. (See Figure 1-7)

	ID	Name 📥	Social Security Number	Date of Birth	Alias	Gender	Banned
/	5 12	Monster, Cookie	****-**-1113	03/03/1987		Male	
/	5 13	Rabbit, Roger	***-**-1114	04/04/1986		Male	
/	🍂 з	test, Baby		01/02/2010		Male	
/	2	test, Just A	***-**-8888	01/01/1976		Transgender	
/	5 10	Trainer, Sioux	***-**-1111	01/01/1988		Female	
/	5 11	Tree, Peach	***-**-1112	02/02/1988		Female	Indefinite
-	16	Tree, Plum		01/01/2001		Male	

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

#### **Existing Client**

Fig

Click on the client **Name** or **Edit** icon Anter the 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	
		i) 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     Middle     Last     Suffix       Bruce     Henry     Banner     Image: Compared to the second t
	Name Data Quality	Full Name Reported         □         □         □         □         06         1         15         // 1970         03         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         >         33         33         33         33
	Alias	Green Man; Hulk DOB Data Quality Full DOB Reported (HUD) ~
	Social Security Number	123 - 85 - 6789 Gender Male ~
	Social Security Number Data Quality	Full SSN Reported (HUD)         V
-	U.S. Military Veteran?	No (HUD)         Y         Primary Race         White (HUD)         Y
	Exact Match	Secondary Race -Select-
	Search ACTIVE Clients	Ethnicity     Non-Hispanic/Non-Latino (HUD) >
	Search INACTIVE / DELETED Clients	0
	Search ALL Clients	0
	Search Clear Add New	Client With This Information     Add Anonymous Client
	Client Number	
Er C	iter or scan a Client ID number to go directly	r to that Client's profile. Submit

Figure 1-3

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						
			0	Please Search the Syste	m before adding	a New Client.	
			🚺 Items in Ital	lics are for Data Entry Ol	ILY and will not	be used for Search Results.	
	Name	First Bruce	Middle Henry	Last Banner	Suffix		
	Name Data Quality	Full Name Reported		$\sim$		Date of Birth	06 / 15 / 1970 🧖 🔿 🦉
	Alias	Green Man; Hulk	I			DOB Data Quality	Full DOB Reported (HUD)
	Social Security Number	123 - 85 - 6789	]			Gender	Male ~
	Social Security Number Data Quality	Full SSN Reported (HUD)	) <u>~</u>			If Other Gender, specify	
	U.S. Military Veteran?	No (HUD)	~		_	Originary Dage	White (HUD)
	Exact Match		Add New Cl	ient Information	. /=		-Select-
	Search ACTIVE Clients	۲	You are about all the possib	to add a New Client to th le matches before contin	e system (Be su ing this process	re to look through ;). Continue with	Non-Hispanic/Non-Latino (HUD) ~
	Search INACTIVE / DELETED Clients	0		Add New C	ient?		
	Search ALL Clients	0			Ok	Cancel	
Figure 4.4	Search Clear Add N	ew Client With This Informat	ion Add Ano	nymous Client			
Figure 1-4						4	
	Client Number		3		_		
	Enter or scan a Client ID number to go direc	tly to that Client's profile.	_				
	Client ID #	Submit					

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)

ShelterPoint	Client	Information				Service Transaction	15		
SkanPoint	Clie	nt Profile Hou	seholds	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary
Admin		Client Record						Issue ID Card	
Logout		Name Name Name Data Quality Alias Social Security SSN Data Quality U.S. Military Veteran? Age Client Demograph Date of Birth Date of Birth Date of Birth Type Gender If Other Gender, specify Primary Race Ethnicity	Client Record	d Editing the Client Record First Bruce Full Name Reported Green Man, Hulk 123 - 45 - 6 Full SSN Reported No (HUD)	Record Information Co Client Sear Hiddle Henry 789	Last Banner	and the Suffix	Save Sav	Change Clear
				1	igure 1-5				

5. Click the **Edit** icon Anext 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)

ShelterPoint	Client Information				Service Transaction	15		
canPoint	Client Profile H	ouseholds	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary
eports dmin	Client Record						Issue ID Card	
gout	Name	Banner, Bruce Hen	iry					
	Name Data Quality	Full Name Reporte	d					P
	Alias	Green Man, Hulk						
	Social Security	123-45-6789						
	SSN Data Quality	Full CCN Basartad	(1105)					Change Clear
	U.S. Military Vetera	n? Client Demo	graphics			<u>×</u>		
	Age	A	Editing the Client and the Client Se	Demographic Information c arch.	ould affect the Unique 1	D		
7 -	Client Demogra	Client Der	nographics			<u></u>		ſ
_	Date of Birth							
	Date of Birth Type	Date of Birth	n –	06 / 15 / 1970 🧖 💐	🥂 🖉 G			
	Gender	Date of Birth	п Туре	Full DOB Reported (HUD)	~ G			
	If Other Gender,	Gender		Male	~ G			
	Specity Drimons ( Dage	If Other Gen	der, specify			G		
	Primary Race	Primary Race	e I	White (HUD)	Ý	G		
	Secondary Race	Secondary F	lace	-Select-	~	G		
	Ethnicity	Ethnicity		-Select-	~ G			
				8 →	Save	Cancel	Save Sa	ve & Exit Exit
	• • • •			Ein	uro 1 6			<u> </u>

Note: Secondary Race is not required

6. Move to Completing Common Intake on page 6.

## **Completing Common Intake**

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

1. 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)

common fintake Form (3	enc,			
COMPLETE FOR ALL ADULTS				
*Note: If needed, please ente	r Household Inform	nation in Household tab.		
Date of Birth*		01 / 01 / 1990 🕂 🖏 G		
Gender*		Female	~ °	
Primary Race*		American Indian or Alaska Native	(HUD) , G , 2	
Ethnicity*		Hispanic/Latino (HUD) V	G C C C C C C C C C C C C C C C C C C C	
Marital Status*		Separated V G		
Highest Level of Educatio	n Attained *	11th grade (HUD) 🗸 🗸		
Address Information				
Current Address	Туре	Street Address	Apartment / Unit Number	City
Add			No matches.	
Contact Method Type		Phone Number (e.g. : 605-222-1212)	Send information via text?	Idress
Add				
Does the client have a dis	abling condition?*	-Select- V G		
Q Disabilities				
		Start Date*	Note on Disability	
Disability Type			No matches.	
Disability Type Add				
Add C Employment Informa	tion			
Disability Type Add Current Status*	tion Type of Emp	loyment*	Employer Name	

Figure 1-7

#### **Address Information**

- 1. 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.

	Ethnicity*			1
	Marital Status*	Address Informatio	on	
	Highest Level of Education Attained	Current Status	Yes V G	L
	Address Information	Address Type	Both - Physical / Mailing 🗸 G	
	Current Address Type	Street Address	200 N Paul Lane G	ber
	Status	Apartment / Unit Number	A124 G	
	Add Add	Zip Code	57106 Apply ZIP Code Information G	of :
		City	Sioux Falls G	······
	Contact Method Type	County of Residence	Minnehaha G ALWAYS CLICK - Information This w	<u>Apply ZIP Code</u> will auto fill information.
		State	South Dakota 🗸 G	
	Add	Reason for Leaving this Residence	-Select- V G	of :
		Landlord's Name	G	
	Does the client have a disabling co	Landlord's Address	G	
	Q Disabilities	Landlord's City	G	
Figure 1-8	Disability Type	Landlord's State	-Select- VG	abi
	Add	Landlord's Zip Code	G	
	Employment Information	Landlord's Phone	G	
	Comment Staturet	Address Data Quality	-Select- V	-
	Ves	Reported Date	01 / 18 / 2017 🕂 🏹 🥸 G	
	Add	Move-Out Date	/// 🧖 🥸 c	of :
	Total Monthly Income*		Save Save and Add Another Cancel	

Note: <u>Bold</u> sections are <u>required</u>. <u>Non-Bold</u> 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.

	Ĺ	Address Informatio	'n	
		Current Status	Yes 🗸 G	1.
		Address Type	Both - Physical / Mailing 🧹 G	
		Street Address	200 N Paul Lane G	be
		Apartment / Unit Number	A124 G	
4	->	> Zip Code	57106 Apply ZIP Code Information G	6
		City 5	Sioux Falls, SD 57106 Sioux Falls (Shindler), SD 57106	
		County of Residence	G	na
		State	-Select- V G	
		Reason for Leaving this Residence	-Select- V	0
	-			



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)

Current Stat	us	Yes	✓ G	
Address Typ	e	Both	- Physical / Mailing 🧹 G	L
Street Addre	255	200 N	Paul Lane G	be
Apartment / Number	Unit	A124	G	Ľ
Zip Code		57106	Apply ZIP Code Information G	of
City 7	IP Code	e Confi	rmation	E
County of Residence	0	Is the fo	llowing ZIP Code information correct?	na
State	ZIP C	ode	57106	÷
Reason for L Residence	City		Sioux Falls	
	State		South Dakota – 7	01
Landlord's Na	Count	y/Parish	Minnehaha, SD 🗸	L
Landlord's Ac			8 Yes No	H
Landlord's City	-		G	
Landlord's State	•	-Sele	ct- v G	ab
Landlord's Zip C	Code		G	
Landlord's Phon	e		G	
Address Data Q	uality	-Sele	ct- 🗸 G	
Reported Date		01 /	18 / 2017 🛛 🔊 🦉 G	
Move-Out Date		_/	/ 🥂 🦉 G	of
			Save Save and Add Another Cancel	

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 ker 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)

	Ethnicity*			
	Marital Status*	Address Information	on	
	Highest Level of Education in the Address Informat	Current Status Address Type	No G -Select- Ves ical / Mailing V G	
	Current Address Type	Street Address	No Lane G	ber City
$1 \rightarrow$	Ves Both - Physical /	Apartment / Unit Number	A124 G	Sioux Falls
	Add	Zip Code	57106 Apply ZIP Code Information G	of 1
	Contact Mathed	City	Sioux Falls G	
		County of Residence	Minnehaha G	nation
		State	South Dakota 🗸 G	Email Address
	Cell Phone	Reason for Leaving this Residence	-Select- V G	
	3	Landlord's Name	C	07 1
	Does the client have a disabling co	Landlord's Address	G	L
	Q Disabilities	Landlord's City	G	
	Disability Type	Landlord's State	-Select- V G	ability
	Add	Landlord's Zip Code	G	
	C Employment Information	Landlord's Phone	G	
	Current Status*	Address Data Quality	-Select- V G	
	🖉 🗑 Yes	Reported Date	01 / 18 / 2017 🛛 🔊 🦓 G	
	4 ->	Move-Out Date	_/_/	of 1
	Total Monthly Income*		Save Save and Add Another Cancel	
	Covered by Health Insurance*	<b>I</b> F	(ALID)	

Figure 1-11

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

#### Adding Contact Method \*\* <u>REQUIRED</u> – 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)

ſ	🔍 Contact Method		Contact Method		<i>i</i> 🕯 🔒
	Contact Method Type	٢	Contact Method Type	Cell Phone 🗸 G	Note: Send information via text should ONLY be answered if client
$1 \rightarrow 0$	Add Cell Phone		Phone Number (e.g. : 605-222-1212)	608-941-3730 G	provides a <u>cell phone</u> <u>number.</u>
			Send information via text?	Yes v K	
	Does the client have a disabling condition?*	L	Email Address	Coolkid2001@hotmail.com	G
	Q Disabilities		Start Date*	12 / 28 / 2016 🛛 🔊 💐 G	
	Disability Type		End Date	// / 👸 🖏 G	
	Add		Print Recordset	Save Save and Add Ar	nother Cancel
ure 1-12	^			3	

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

Fig

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 Appendix 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)

	🔍 Contact Method	Contact Method	<i>&amp;</i> 🔒
	Contact Method Type	Contact Method Type G	i a
	Add	Phone Number (e.g. : 605-222-1212) 608-941-3730 G	
		Send information via text?	
	Does the client have a disal	Email Address Coolkid2001@hotmail.com	G
	🔍 Disabilities 📩 📩	Start Date* 12 / 28 / 2016 🔊 💸	G
Figure 1-13	Disability Type 2	End Date	G
	Add	Print Recordset Save Save and	Add Another Cancel

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

#### Disabilities

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

1 Does the client have a disabling of	ondition? Yes (HUD) V	
Q Disabilities	-Select- Yes (HUD)	HUD Verification 🔔
Disability Type	Client doesn't know (HUD)	Above condition is going to be long term?
	Client refused (HUD) Data not collected (HUD)	

#### Figure 1-14

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 <u>Non-Bold</u> sections *if information is available.* (4)

Usend is stated Address         Image: State Address </th <th>Client's Residence / Last Permanent Add</th> <th>ress Edit Recordset - (17)</th> <th>Banner, Bruce Henry</th> <th>X</th> <th>3</th> <th>ctN</th> <th>la Chata</th> <th>Current</th>	Client's Residence / Last Permanent Add	ress Edit Recordset - (17)	Banner, Bruce Henry	X	3	ctN	la Chata	Current
Is 19 3 Marrice Street     Is 19 3 Marrice Street <th>Client's Street Address</th> <th>Disabilities</th> <th></th> <th>£ 0.</th> <th>is City</th> <th>Client</th> <th>'s State</th> <th>Residence</th>	Client's Street Address	Disabilities		£ 0.	is City	Client	's State	Residence
Add   Add   Octact Nethod   Select   Generation via tex   Generation via	/ 🗑 1919 America Street	Disabilities		U	alls	South D	Dakota	Yes
Add Disability   Gentact Method If vas. Espected to de independentiation via beau	2000 S. Beach Drive 3	Disability Type	Hearing Impaired	G	ird	South D	Dakota	No
Contact Hethod   If Ves: Expected to be flog:-contact Hethod   If Ves: Contact Hethod </td <td>Add</td> <td>Disability determination</td> <td>-Select-</td> <td></td> <td>2</td> <td></td> <td></td> <td></td>	Add	Disability determination	-Select-		2			
Ves     Ves     If Ves. Decimentation        If Ves. Gournatation        If Ves. Decimentation        Add        If Ves. for Matal   Health Problem,   Add.	Contact Method Contact Method Type Temail	If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live	-Select- V 6				Send informat	ion via text?
Add   Does the client have a disabling condition?     Add     I'Yes for Mental   Health Problem?   Add <b>Obset Des Obset Des Obset Des Obset Des Obset Des Obset Des Obset Des</b> <t< td=""><td>Cell Phone</td><td>If Yes, Documentation of the disability and</td><td>-Select- 🗸 G</td><td></td><td></td><td>Y. Y</td><td>′es ∕es</td><td></td></t<>	Cell Phone	If Yes, Documentation of the disability and	-Select- 🗸 G			Y. Y	′es ∕es	
If Yes for Mental   Hadt   Note on Disability     Add     Type of Employment   Add     Total Monthly Income   Covered by Health Insurance     If Yes for Mental        If Yes for Mental	Add	If Yes for Mental Health Problem, Alcohol Abuse, Drug Abuse, or Both Alcohol and Drug Abuse, How confirmed (PATH only)	-Select-	c	3			
Add     (If yes)Currently receiving services or treatment?     Select-     0       Type of Employment Add     Start Date*     Io6/26/2016 20 20 4     Date icon     next to start date.       Total Monthly Income Covered by Health Insurance     Above condition is going to be long term?     Ives v a Ives v a     Ives v a	Dis 4	If Yes for Mental Health Problem (PATH only) Serious mental illness (SMI) and, if SMI, how confirmed	-Select-	Enter a current	ppropriate o date by sel	date as needed ecting the <b>Set</b>	d or leave to Curre	e as ent
Start Date*     I 06//26//2016 20 3 2 4       Type of Employment     Note on Disability       Add     Add       Total Monthly Income     Above condition is going to be long term?       End Date     I Ves v 6       End Date     I Ves v 6	Add	(If yes)Currently receiving services or treatment?	-Select-	Date ic	on 👋 n	ext to start dat	e.	
Type of Employment     Current employer?       Add     Current employer?       Total Monthly Income     Above condition is going to be long term?       End Date     /// @@> @@	C Employment Information	Start Date *	06/26/2016 2000					
Covered by Health Insurance Above condition is going to be long term? End Date Ind Date Can	Type of Employment Add Type Units and Units an	Note on Disability		G			Current employ	er?
	Covered by Health Insurance	Above condition is going to be long term? End Date						Cancel
Print Recordset Save and Add Another Cancel		Print Recordset	Save Save and Add Anoth	er Cancel				

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

#### **Employment Information**

1

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

Reported Date	Current Status	Type of Empl	oyment	Employer Name		Employment End Date	Overall Total Monthly Inco
2 🗋 04/20/2017	Yes	Full Time		Mernards			US\$2,200.00
03/29/2017	No	Full Time		Sioux Falls Ford			US\$1,500.00
Add				Showing 1-2 of	f 2		
alth Insurance							
Covered by Health Insurance*		Yes (HUD)	) ~ G				
							Cance
			Fig	ure 1-16			
			Fig	ure 1-16			
	Employment ,	/ Income	Fig • Information 05 / 24 / 2017	n (Retired, SSDI, all inc	come source	25)	
	Employment , Reported Date	/ Income	Fig E Information 05 / 24 / 2017	n (Retired, SSDI, all inc	come source	es)	
	Employment Reported Date Employment Current Status	/ Income	Fig <b>1 Information</b> 05 / 24 / 2017 -Select- > G	n (Retired, SSDI, all inc	come source	25)	
	Employment , Reported Date Employment Current Status Type of Employm	/ Income	Fig E Information 05 / 24 / 2017 -Select- ~ G -Select-	ure 1-16 n (Retired, SSDI, all inc 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	come source	25)	
	Employment , Reported Date Employment Current Status Type of Employment Employer Name	/ Income	Fig E Information 05 / 24 / 2017 -Select- ~ G -Select-	ure 1-16 n (Retired, SSDI, all inc 7 & & & & & & & & & & & & & & &	come source	25)	
2	Employment / Reported Date Employment Current Status Type of Employer Employer Name Employment End I	/ Income [ nent [ Date [	Fig E Information 05 / 24 / 2017 -Select- ~ G -Select- / _ / _	ure 1-16 n (Retired, SSDI, all inc 7 2 3 3 2 2 6 G G G 3 3 3 8 6	come source	25)	
2	Employment / Reported Date Employment Current Status Type of Employr Employer Name Employment End I	/ Income [ nent [ Date [ I, all incom	Fig 2 Information 05 / 24 / 2017 -Select- ~ G -Select- / / / [ e sources]	ure 1-16 n (Retired, SSDI, all inc 7 3 3 3 3 6 6 6 3 3 3 8 6	come source	25)	
2	Employment Reported Date Employment Current Status Type of Employm Employer Name Employment End I Coverall Total Mont Income	/ Income [ nent [ Date [ I, all incom	Fig 2 Information 05 / 24 / 2017 -Select- ~ G -Select- _ / _ / _ e sources)	ure 1-16 n (Retired, SSDI, all inc 7 3 3 3 3 6 6 6 3 3 3 3 6 6	come source	25)	

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)

	, .,,-			···,		
	🧪 🧋 Hearing Impaired	03/2	9/2017	Unable to hear out of the	eft ear	
	Add	Edit Recordset - (324) Test	, Helpline Center	×		
1	Employment / Income Info	Employment / Income	Information (Retired, SSDI, all income so	urces) <i>i</i> 🔒		
	Reported Date 2	Reported Date	04 / 20 / 2017 🧖 🔿 🧟 G		Employment End Date	Overall Total Monthly Income
$\rightarrow$	2 🛛 🖉 04/20/2017	Employment				US\$2,200.00
-	7 🗑 03/29/2017	Current Status	Yes V G			US\$1,500.00
	Add 3	Type of Employment	Full Time V G			
	Health Insurance	Employer Name	Mernards G			
	Covered by Health Insurance*	Employment End Date	// 🧖 🞝 🤯 G			
		Income (Retired, SSDI, all incom	e sources)			Cancel
		Overall Total Monthly Income	e 2200 G			
		Print Recordset	Save Save and Add Another	4 Cancel		
		- 1	K			



 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.

Health Insurance	
Covered by Health Insurance *	Yes (HUD) VG
	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. <u>Client Notes are shared Globally.</u>

Type of Employr		Employer Name		Current employer?
🦯 🧋 Full Time	Note		1	Ves
🥖 🗑 Part Time	/			No
Add	Add a New	v Client Note - (17) Banner, Bruce Henry	Showing 1-2 of 2	
Total Monthly Income	Note Date*	06/26/2016 🕂 🖏 🔿 🦉		
	Notes	Bruce is hard of hearing on the left side.		
Covered by Health Insurance	•	Bruce lives alone and has a companion dog named		
				Cance
Client Notes	4			
Provider				
Add New Client Note Print			No matches.	
File Attachments				
		ii.		
			Provider A	dded From
Date Added -				
Add New File Attachment		Save Cancel	No matches.	

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.

	Client Notes 2			HINT: The ONLY way to see if another agency has added an POL is to look in the File
	Provider           V         V           Image: State of the		Note Date         Note Preview           06/26/2016         Bruce is hard of hearing on the left si	Attachments area
	Add New Client Note Print	Upload Attachment Name* BrowseNy file selected.	Showing 1-1 of 1	Added Form SHOULD say ROI. If not, double check the scanned copy to see if it an
≫[	Date Added - Add New File Attachment	Drivers License Copy	Provider A	ROI or another document. NOTE: You cannot see other
	Incidents Start Date End Date Incident Add New Incident	Upload	Cancel a Provider No matches.	the ROI Tab you must look in the File Attachments area.
				Save Save & Exit Exit

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

File A	ttachments						
	Date Added 💌	Name	Description	Туре	Provider	Added From	
/ 🧋 🔍	06/26/2016	211.jpg	Drivers License Copy	jpg	7 Day Shelter Program - St. Francis House	Client Profile	ſ
Add New	File Attachment	ent Showing 1-1 of 1					

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 🔘

4. Click the **Edit** icon *i* 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.
- 3. 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.

	C Employment Information	Incident 🧔 🗷	
	Type of Employment	Add a New Incident - (17) Banner, Bruce Henry	Current employer?
	Z 💐 Full Time	Provider* 7 Day Shelter Program - St. Francis House (17)	Ves
	🧷 🧃 Part Time	Start Data 1 06//26//2016 8 3 8	No
	Add	Fad Data	
	Total Monthly Income		
	Covered by Health Insurance	Incident Code 001	
		Ban O <u>Yes</u> O <u>No</u>	Cancel
		Staff Person Riley Zafft	
Figure 1-21	Client Notes	Sites Barred From St Francis House	
-	Provider		Full Note
	🖉 🦉 7 Day Shelter Program - St. Franc	Notes Client did extremeter follow the elements acted up	eft si 🧃
	Add New Client Note Print	Client did not want to follow the snowering schedule. f1	
	File Attachments		
	Date Added 🛩		Added From
	2 🗑 🔍 06/26/2016	Save Cancel	Client Profile
	Add New File Attachment	Showing 1-1 of 1	
	Incidents		
	Start Date End Date Inciden	Incident Code Provider	Ban Site Staff
3	Add New Incident	No matches.	
			Save Save & Exit Exit

4. 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 <u>Search Existing Households</u> or <u>Start New</u> <u>Household</u>.
- 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.



- 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 4. 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:

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.

ClientPoint > Clien	nt Profile	Unusehold Conveh	Type here for Globa
Last Viewed Home	Client - (17) Banner,	Household Search	
ClientPoint ResourcePoint	(17) Banner, Bruce Henry Release of Information: No	Search for a Household by using keywords for Client Names, Client ID, or Social Security Numbers of Clients already in a Household. Search Banner Show Advanced Search	-Switch to
SkanPoint  Reports	Client Information	Search Clear	s Assessm
> Admin Logout	A Previous Househ	Household Results Household Type Head of Household Client Count	
	Search Existing Househol	No matches.	
Legal Notices	•		
		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)

SERVICEpoint* Connecting Your Community.		Add New Hous	ehold							R	
ServicePoint Train 7 Day Shelter Progra	ning Site am - St. Francis Hous	Househol	d Type								
ClientPoint > Clien	t Profile	Household	ype*	Male Single Parent -Select- Couple With No Chi	√						Type here for Glo
Last Viewed Homo	Client - (17) Banner, B	31		*Female Single Parent Foster Parent(s)		n before addin	g a New Client.	Hic	le Advance	d Search	
ClientPoint	(17) Banner, Bruce Henry Release of Information: None	Name	First	Male Single Parent Non-custodial Careg Other	giver(s)		Last Banner		Suffi	ix	-Switch
ShelterPoint	Client Information	Quality	-Sele	Two Parent Family		~					
SkanPoint Reports	Client Profile	Alias Social Securi	ty	7-[]-[							Assess
Admin Logout		Number     Image: Constraint of the second sec									
	Search Existing Households	U.S. Military Veteran? Exact Match	-Sele	ect-	~						
Legal Notices	· · · · · · · · · · · · · · · · · · ·	Search	Clear	Add New Clie	nt With This I	Information	Add Anonyn	mous Clie	nt		-
		Client Nu Enter or Scan a Client ID #	mber Client ID to	add that Client to tl	his Household ubmit	ł.					
		Selected	Clients								
		ID Name		Social Security Number	Date of Bir	th Ali	as	Gender	Banned	Household Count	
	3 →	17 Banner, Henry	Bruce	***-**-6789	06/15/1970	Gre	een Man, Hulk	Male	Indefinite	0 🔍	
	_	Showing 1-1 of 1									
								Contin	ue	Cancel	
				Figure	1-24						

- 4. Set the Head of Household indicator. (4) If this client is Head of Household, select Yes, otherwise select No.
- 5. 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)
- 6. 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.
- 7. 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.

#### Adding Minor (Child) to Existing Household

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

1. Click Households > Click Search Exiting Households > Enter minors name > Click Search > Enter Household Type. <u>If Minor is not in the system</u> – Click Add Client With This Information > Confirmation textbox will appear > Click Okay.

	Add New Household	×
ing Site	Household Type	
1	Household Type* -Select-	
t Profile	Client Search	
Client - (1) Banner, Bruce Henry	Please Search the System before adding a New Client.     Hide Advanced Search     Tems in Italics are for Data Entry ONLY and will not be used for Search Results.	
🗑 (1) Banner, Bruce Henry Release of Information: None	Name         First         Middle         Last         Suffix           Banner	
Client Information	Name Data -Select- Quality Date of J/ J 2010	
	Alias DOB Data Quality -Select-	
Provious Households	Social Security	~
Search Existing Households Start New Household	Social If Other Security -Select- Gender, Data Quality Specify	
	U.S. Military -Select- V Veteran? -SelectSelect-	~
	Exact Match Secondary Race -Select-	~
	Ethnicity -Select-	
	Search Clear Add New Client With This Information Add Anonymous Client	

#### Add Adult Client to Existing Household

Figure 1-27

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)

ServicePoint Train	ning Site ntry - Feeding South Dakota	Household Information - (6) Male Single Parent 🧔	
ClientPoint > Clie	ent Profile	(6) Male Single Parent Save & Exit Exit	re for Globa
Last Viewed Favorites     Home	Client - (17) Banner, Bruce Henry	Household Type* (Male Single Parent US\$0.00	
ClientPoint ResourcePoint	(17) Banner, Bruce Henry Release of Information: None	Client Count 2 Household Members	J Su
SkanPoint	Client Information	Name Age Head of Relationship to Head of Joined Household * Previous Household * Associations Count	old
Reports	Client Profile Households	☐	its
Logout		□ (38) Banner, Paxton Evan         No ↓         -Select・ ↓         07 / 19 / 2016 10 20 0 ↓         1 ♀	
Logour	★ (6) Male Single Parent     2	Add/Delete Household Household Household History Repo	ort
	Name     (12) Basses Bruce Mean	Previous Household Members	d of Hous
	(17) Banner, Bruce Henry (38) Banner, Paxton Evan	Individual Client Assessment	
	Manage Household	Household Members / Client Record Issue ID Card	
	Previous Households	Ci27 Bannar, Bruce Henry Name Banner, Bruce Henry	-
	Search Existing Start New Household	Age Uncom     Age Uncom     Age Uncom     Age Uncom	
		Social Security *****-6789	
Legal Notices		U.S. Military Veteran? No (HUD)	
		Age 46	
		Household Information (SENC)	<u>.</u>
		Date of Birth 06]/15]/1970 20 30 4	
		Relationship to Head of Self (head of household)	G
		Cancel	
		Save Save & Exit Exit	

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

ServicePoint Iraini	ing Site		Household Information -	( Household I	Members						
Sioux Falls Food Pant	ry - Feeding South Dakota		(6) Hala Girala D	Name			Age Head of Househol	Relationship to Head of Household	Joined Household	Previous Association	Household Count
ClientPoint > Client	nt Profile		(o) Male Single Parent	🧃 (17) Banner,	Bruce Henry		46 Yes	Self	07/07/2016	0 🔍	1 🔍
Last Viewed Favorites	Client - (17) Banne	er. Bruce Henry	Household Type* M Income US	al 🧋 (38) Banner, 55	Paxton Evan		No		07/19/2016	0 9	1 Q
Home		,,	Client Count 2								
ClientPoint	(17) Banner, Bruce Henry		Household Members	<ul> <li>Previous</li> </ul>	Household Me	mbers					
SkapPoint	Release of Information: Nor	ne		1		This House	hold does not l	ave any previous m	embers.		
▶ Reports	Client Information			(							1
▶ Admin	Client Profile	Households	- 3	Add Clien	ts to the not	senoid					
Logout			C3 kton Evan	Client Se	earch						
	▼ (6) Male Single F	Parent	Members		6	Please Search	the System h	fore adding a New (	Client. H	ide Advanced	Search
	Name		6		Elert .		Middle	Inst		Sume	
	(17) Banner, Bruce Henr	Ŷ	Previous Household Men	1b Name				Bun			
	(38) Banner, Paxton Eva	an -	Individual Client Accord	Name Data	-Select-			~			
	Manage Household			Quancy							
			Household Members	Social	-						
	Previous Househ	olds	(17) Banner, Bruce Henry	Security	· · · ·	-					
			Seft, Age: 46	Social							
	Households	Start New Household	Age: Unknown	Security	-Select-			~			
				Data Quality							
Legel Notices			-	U.S. Military Veteran?	-Select-		×				
				Exact							
				Search	Clear	Add New Cli	ent With This	Information Ad	d Anonymous	Client	
				Client N	umber						
				Enter or Scan a	Client ID to	add that Client	to this Househ	old.			
				Client ID #		5	Submit				
				Client Re	esults						
				ID Name		Social Security Number	Date of Bir	th Alias	Ge	nder Banned	Household Count
			4 1	15 Bunny,	Bugs	***-**-1116	06/06/198	16	Ma	le	o 🔍
				25 Bunny,	Lexi	***-**-2455	02/15/198	0	Fe	male	1 Q
				-				Showing 1-2 of 2			
				Selecter	d Clients						
				ID Name		Social Security Number	Date of Birt	h Alias	G	ender Banned	Household
			5					No matches.			

- 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)



## 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 to 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.

SERVICEPOINT Interneting Your Community	Household Information - (6) Male Single Parent	
ServicePoint Training Site Helpline Center - 2-1-1 May 21, 2014 ClientPoint > Client Profile	Income         US\$0.00 Q	Тур
ClientPoint > Client Profile Last Viewed Favorites Gine Point Skan Point Client - (17) Banner (17) Banner, Bruce ard Information: free Skan Point Client - (17) Banner, Bruce ard Information: free Client - (17) Banner, Bruce Henry (18) Banner, Bruce Henry (19) Banner, Bru	Income       US\$0.00         Client Count       2         Household Members       Age Head of Relationship to Head of Josined Household Associations Count         (17) Baner, Pruce Henry       46 Veas Self         (2)       8) Baner, Pauce Henry         (2)       8) Baner, Pauce Henry         (3)       9) Baner, Pauce Henry         (4)       No         (5)       8) Baner, Pauce Henry         (4)       No         (5)       8) Baner, Pauce Henry         (4)       No         (5)       8) Baner, Pauce Henry         (4)       No         (5)       9) Coll         (6)       (7)         (7)       (7)         (8)       Baner, Pauce Henry         (7)       Paucehold Hembers         (8)       Baner, Pauce Henry         (7)       Paucehold Hembers         (8)       Paucehold Hembers         (7)       Paucehold	nother Household Memb Assess Age Head of 46 Ves 4 No
	Gender Relationship to Head of Household Gelf (head of household) o Cancel Save Save & Exit Exit	

Figure 1-26

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

If client was added to household in <u>error</u>. Click Add/Delete Household Members. In the Previous Household Members area - click the trash icon in 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)

	Epoint			Но	ousehold Informatio	n - (6) Male	Single Pare	nt					đ	
		(6) Male Single Parent Save 8. E Household Type* Male Single Parent							Save & Exit	Exit				
	entPoint > Clie	ent Profile			Income	US\$0.00 🔍								ere for Global Se
	red Favorites	Client - (17) Banner, Bruce Henry			Client Count	2								
	nt Point	(17) Banner, Bruce Henry Release of Information: None		Name Age Head of Relationship to Head of Joined Household Household						id of Joined Household*	Previous Associati	Household	- 🗸 Subm	
	t	Client Information			(17) Banner, Bruce Henr	Y		46	Ves 🗸	Self	07/07/2016		1 0	
		Client Profile	Households	•	Add/Delete Household Members			4		1500	0/0//19/2016	Household Hi	istory Report	ents
		▼ (6) Male Single Paren	t	17	<ul> <li>Previous Household I</li> </ul>	tembers	Add/Delete	Hous	sehold M	1embers - (6) Ma	le Single Parent			
		Name     (17) Banner, Bruce Henry		Ē	Individual Client Asses	Household			Nold Members					Household
		(38) Banner, Paxton Evan (25) Bunny, Lexi	xton Evan		Household Memb		(17) Banı	ier, Bru	ce Henry	Delete Hou	usehold Head of Househol sehold Relationship	d Household	Associations	Count
Figure 1-27		Manage Household			(17) Banner, Bruce Hi Seit, Age: 46 (38) Banner, Paxton Bvan	4	🏲 👿 (38) Banı I	ier, Pax	ton Evan	A You are a	bout to delete the Househ	old Relationship	p for:	
		<ul> <li>Previous Households</li> </ul>		ŧĽ	Son, Age: 4	- Al 50	e 👻 Previo	us Hou	sehold Mei	mbers This will Complet	delete this Client's associ	ation with the H this association	tousehold 1?	
		Search Existing Households	Start New Household	1		U. Ve	Name t 🥡 (25) Buni	ıy, Lexi		Age    36	$5 \rightarrow$	Delete	Cancel	nt Q
				н.		Ag	21				_			E
				н.		He	Add C	ients to	o the Hous	sehold				
				L.		Dat	e					Conti	inue C	ancel
						Reli	8							
													Cancel	
											Save	Save & Exit	Exit	

## 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 <u>Client Search- New & Existing Clients</u>. 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.
- 2. 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.
  - a. 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 <u>always enter</u>: 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)





Click the Trash icon storemove 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.

📔 ClientPoint > Clier	nt Prof	ile							Type here for Global Search	🤹 🕕 📩 🙆	
Last Viewed Favorites     Home	CI	ient - (1	7) Banner, Bri	uce Henry						ſu	
ClientPoint		(17) Banner, I	Bruce Henry								
ResourcePoint	Relase of Information: Ends 01/01/2099 -Switch to Another Household Member-										
SkanPoint	Clie	•	n								
Admin		6		Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments	Summary	
Logout										<u></u>	
		Release	of Information								
	1	Pro	ovider				Permission	Start Date	End Date		
		🤇 🧃 Ge	eneral - The Comm	nunity Outreach			Yes	07/21/2016	01/01/2099	$8 \rightarrow \bigcirc$	
	┣ ♪	Add Releas	e of Information			Showing					
										Exit	
1											