Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 3

Service Transactions
(Need, Service, Referral)

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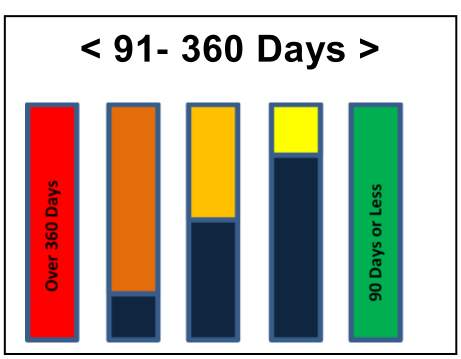
Icon Overview

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

	SerivcePoint Icon	SENC Partner Agency
	Lock Icon	Agency Shared Information
	UnLock Icon	Globally Shared Information
	Edit Icon	Update / Change Current Information
	Delete Icon	Remove enteries 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



Adding a Service

When to add a Service: Services are added when a *need* is identified and the *service* can be provided at that time by your agency.

1. Search for and select a client in *ClientPoint*. **(1)** (*Reference Section 1- Page 3*)

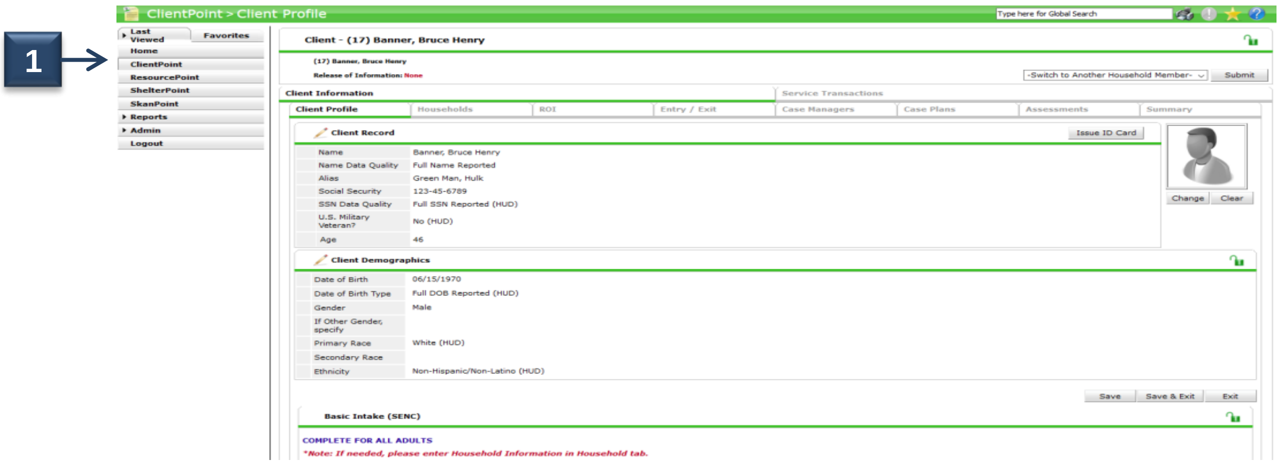


Figure 1-33

2. After a client is located or added, click the **Service Transaction** tab to display the **Service Transaction Dashboard**. (See Figure 1-34) Click the **Add Service** button to display the **Add Service** screen.

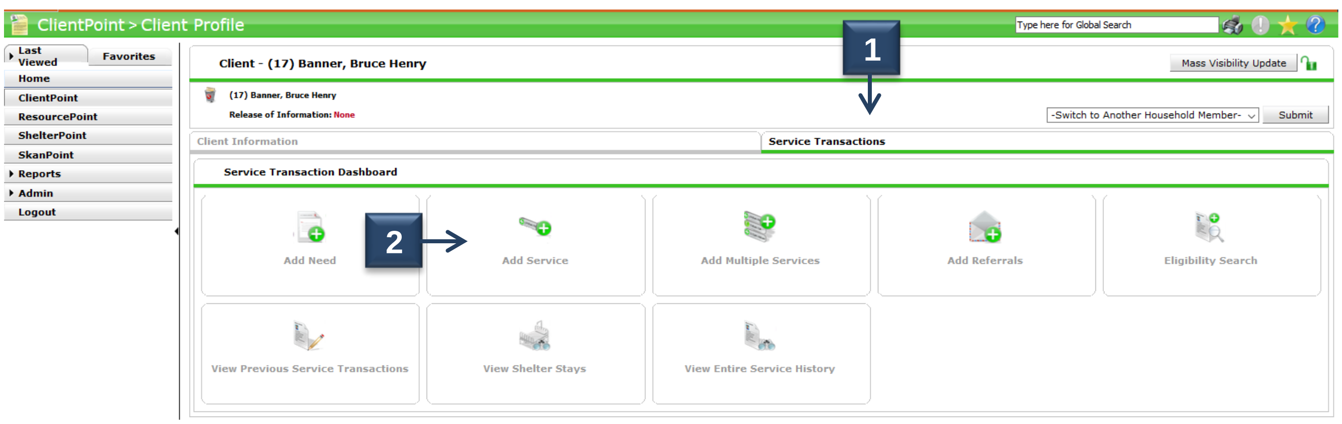


Figure 1-34

3. In the Household Members section if the client is not part of a household - **No Household Members were originally associated** will appear. Proceed to number 4. If client **is** a member of a household click the **checkbox(s)** next to the household member's names you wish to provide service to. (See Figure 1-35) In most cases, you will <u>ONLY</u> provide services to the primary client or the client 'pre-selected'. **(3)**

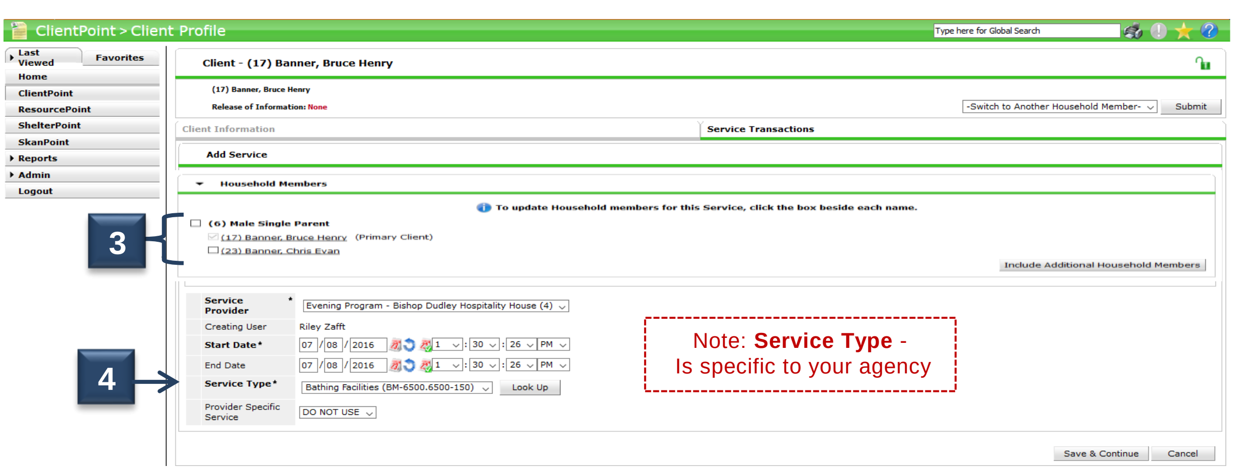
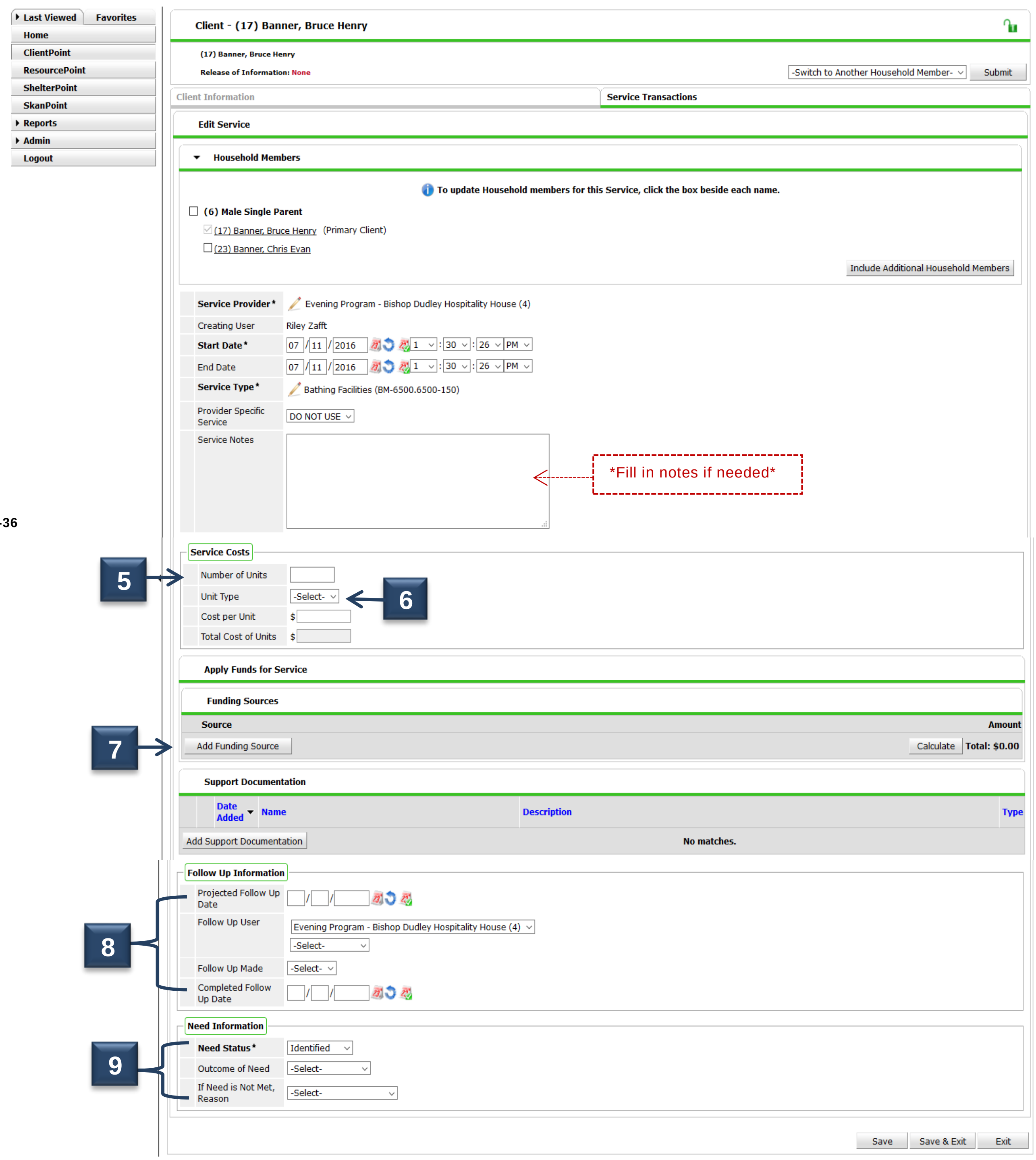


Figure 1-35

4. Service Provider will default to current provider. Select a **Service Type** from the pick list. **(4) Start Date** and **End Date** for the Service will default to the current date. (See Figure 1-35) *If applicable* - Select a **Provider Specific Service** from the picklist. If not- select **DO NOT USE**. Click **Save & Continue**.
5. *If applicable* ~ Service Cost: Enter **Number of Units**. **(5)** Select **Unit Type** from the picklist. **(6)** *If applicable* - enter **Cost per unit**.
6. *If applicable* ~ Click **Add Funding Source** to add a funding source. **(7)** Multiple funding sources may be added for each Service. (See Figure 1-36)
7. *If applicable* ~ In the **Follow Up Information** area, if a follow up is needed, choose the **Projected Follow Up Date** and a **Follow Up User.** The Actual Follow Up Date and Follow Up Made fields are completed when the follow up occurs.
8. In the Need Information area, select a **Need Status, Outcome of Need, and If Not Met, Reason** from the pick list. <u>This is a required for Need documentation</u>.
9. Click **Save & Exit** to return to Service Transaction Dashboard. (See Figure 1-36)

Figure 1-36



Multiple Services

***Note:** We encourage services to be added separately*

1. Click the **Add Multiple Services (1)** button to display the Add Multiple Service screen. (See Figure 1-37)

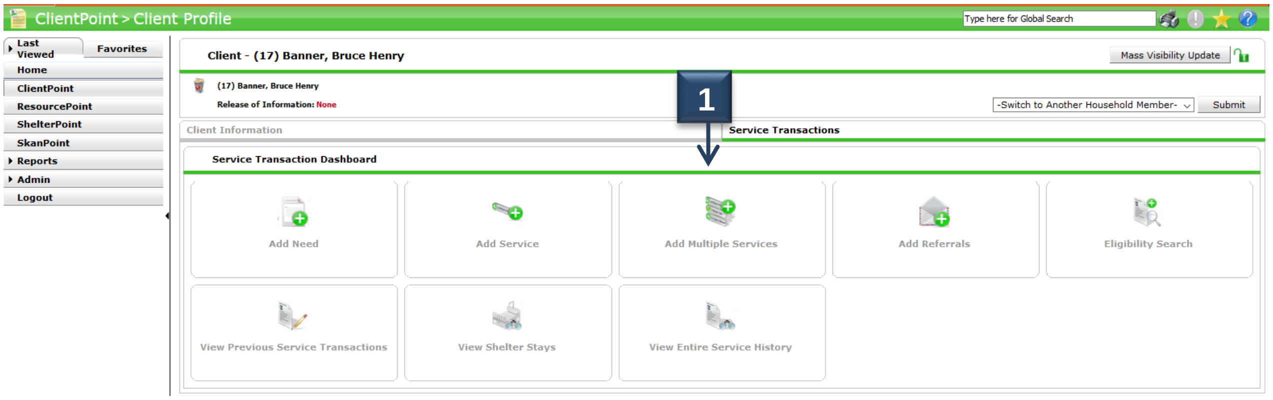


Figure 1-37

2. In the Household Members section if the client is not part of a household - **No Household Members were originally associated** will appear. Proceed to number 4. If client **is** a member of a household click the **checkbox(s)** next to the household member's names you wish to provide service to. **(2)** (See Figure 1-38) In most cases, you will <u>ONLY</u> provide services to the primary client or the client 'pre-selected'.
3. Service Provider will default to current provider. Select **Service Provider** if not defaulted. **(3)** The **Start Date** and **End Date** for the Service will defaulted to the current date.
4. *If applicable* ~ Enter **Number of Services**. **(4)** Select **Service Type** from the pick list. **(5)** Select **Need Status** from picklist. **(6)**
5. *If applicable* ~ Click **Add Another (7)** and repeat steps **3-5**. Click **Save & Exit.** (See Figure 1-38)

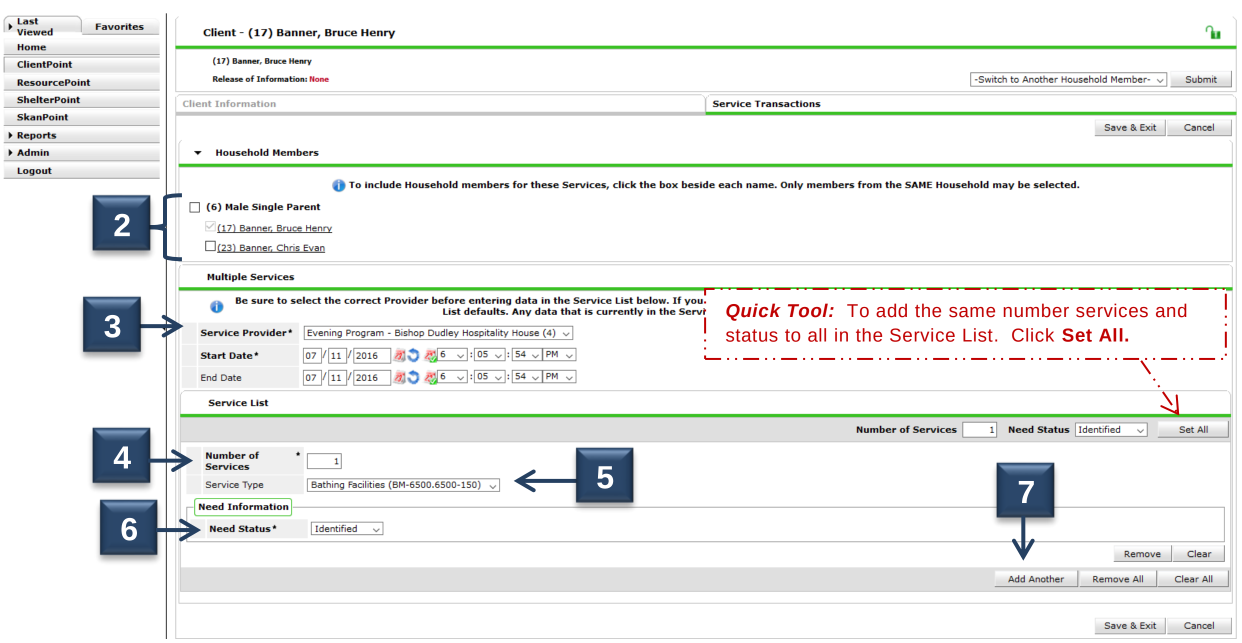


Figure 1-38

Adding a Need

When to add a Need: Needs are added when a *need* is identified and the *service* cannot be provided at that time or a referral to another agency is needed.

1. Search for and select a client in *ClientPoint*. (*Reference Section 1- Page 3*)
2. After a client is located, click the **Service Transaction** tab to display the **Service Transaction Dashboard. (1)**
3. Click **Add Need (2).** (**See Figure 1-40** See **Add Need** screen.) (See Figure 1- 39)

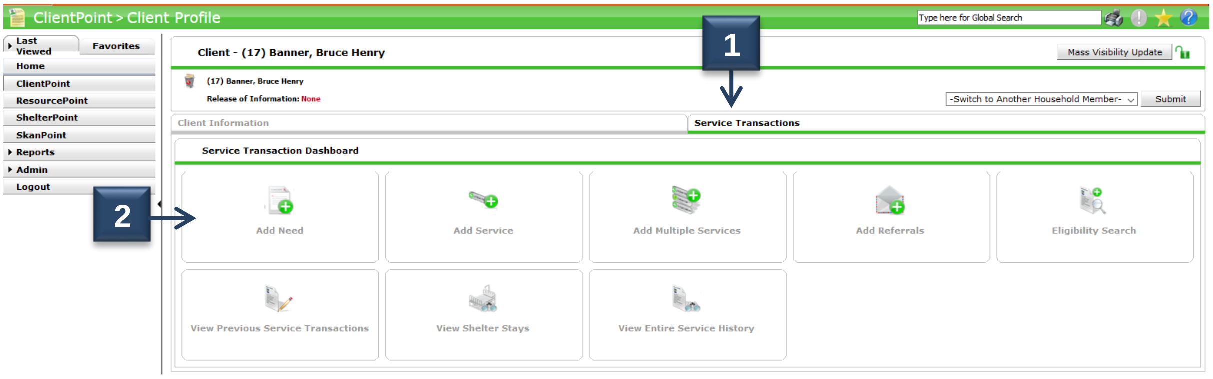
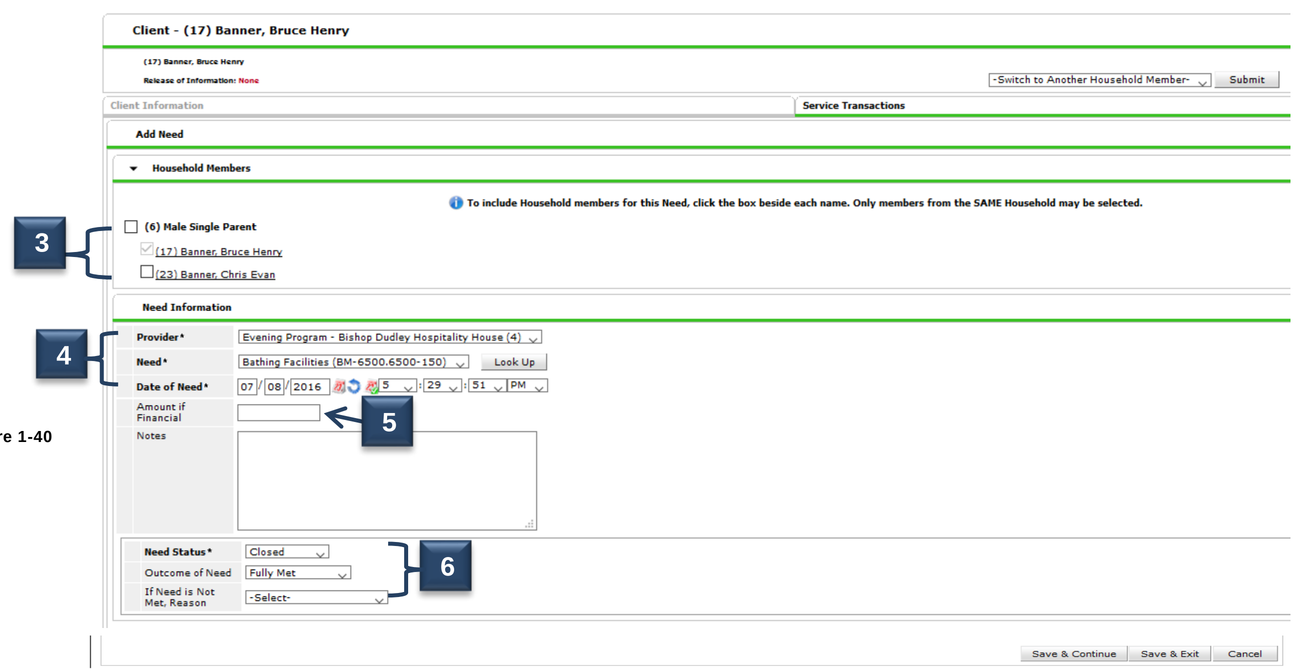


Figure 1-39

4. Once on the Add Service screen. In the Household Members section if the client is not part of a household - **No Household Members were originally associated** will appear. (See Figure 1-40)
   a. If client **is** a member of a household click the **checkbox(s)** next to the household member's names you wish to provide service to. **(3)** In most cases, you will <u>ONLY</u> provide services to the primary client or the client 'pre-selected'.

5. Select the **Provider** issuing the Need. The field defaults to the user's current provider. Select a **Need** from the pick list. **Date of Need** will default to the current date. **(4)**
6. *If applicable* - Enter **Amount if Financial** if there is a dollar amount associated with the Need**. (5)**
7. *If applicable* - Add **Notes** to include further information regarding the Need.
8. Complete **Need Status**, **Outcome of Need** and **If not Met, Reason**. **(6)** Click **Save and Exit** to display a list of the client's Need on the **Previous Needs** screen.
9. Click **Save and Exit** to display a list of the client's Need on the **Previous Needs** screen.

Figure 1-40



Note: If you enter data in multiple programs within an agency you will have choose the correct one.

Adding a Referral

When to add a Referral: Needs are added when a *need* is identified, but your agency **does not** provide the service.

1. Search for and select a client in *ClientPoint.* **(1)** (*Reference Section 1- Page 3*)

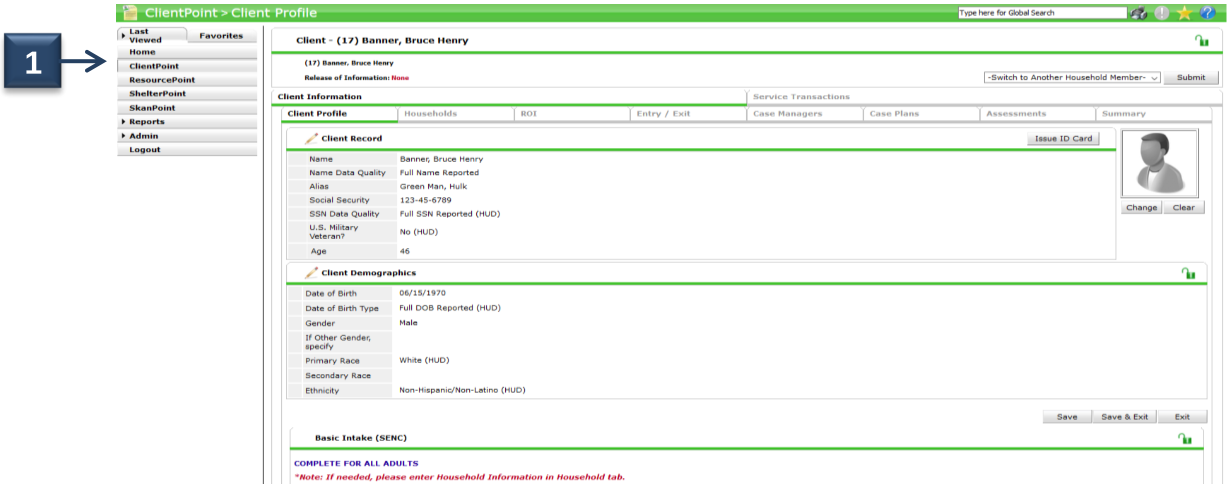


Figure 1-41

2. Click the **Add Referral** button to display the **Add Referral** screen. **(2)**

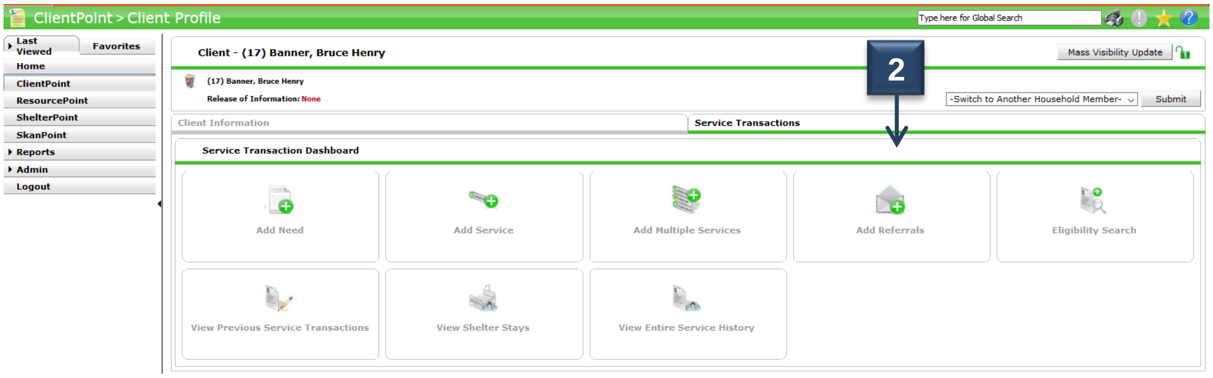


Figure 1-42

When adding Referrals the first area of the screen is Add Needs; because, Referrals are associated with Needs. This area contains multiple sections including Household Members, Needs Assignment and Need Data sections. Scroll to the bottom of the page.

Note: In the Add Needs area click the **Arrow** icon to close and/or open the Add Needs area of the screen. Closing the area reduces the number of sections visible on the screen.

3. Once on the Add Referral screen. In the Household Members section if the client is not part of a household - **No Household Members were originally associated** will appear. Proceed to number 4. If client **is** a member of a household click the **checkbox(s)** next to the household member's names you wish to provide service to. <u>In most cases, you will **ONLY** provide services to the primary client or the client ‘pre-selected’.</u>
4. Scroll down to **Referral Provider Quicklist** to select a provider that is part of the SENC. (See Figure 1-47; Page 10)
    a. If you know which SENC provider offers the Need(s), select the provider from the **Referral Provider Quicklist**. *> Go to step 1 on page 10.*

    If the provider or Need(s) is **<u>not</u> found in the **Referral Provider Quicklist** > *go to step 6 on page 8***

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5. Simply enter a keyword in the **Search** field **(5)** and click **Search** to refine (or limit) the provider search results.
6. Click the **Provider Name** in the *Search Results*. **(6)** (See Figure 1-44) If an agency you need does not appear call SENC System Administrator or 211 for additional resources.

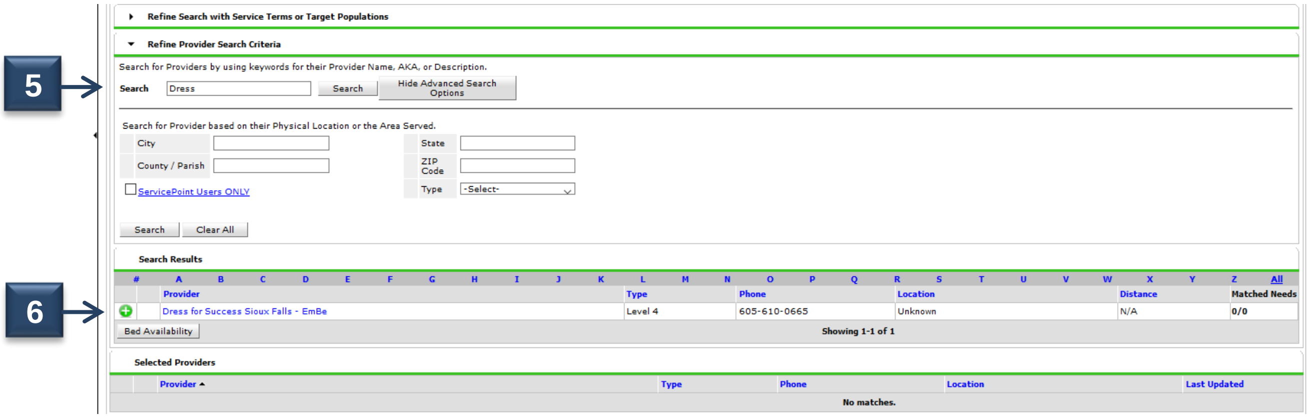


Figure 1-44

7. Once you have clicked the **Provider Name** the *Provider Profile* will appear. (See Figure 1-45) Locate the correct **Need(s)** - Click **Add Referral. (7)** Click **Exit** to return to the Search Results.
8. Select from the list of referral options for that agency.
   a. If Add Referral is **red** – that agency is currently not receiving referrals for that service. *Go to step 9.*

Optional: Click **Send Summary** to send a email copy of the summary description or Click **Print**.

Note: The ***ServicePoint*** icon indicates that the provider uses *ServicePoint.* None *ServicePoint* providers will display a blank area

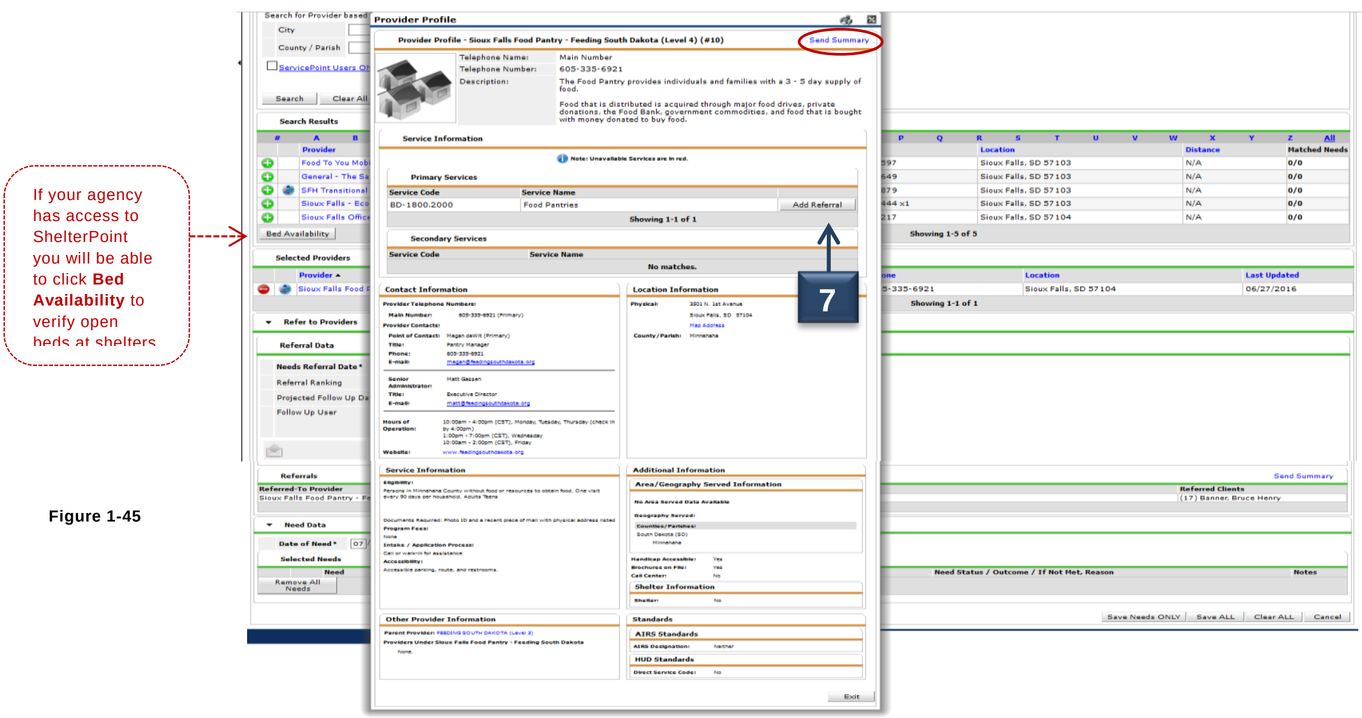
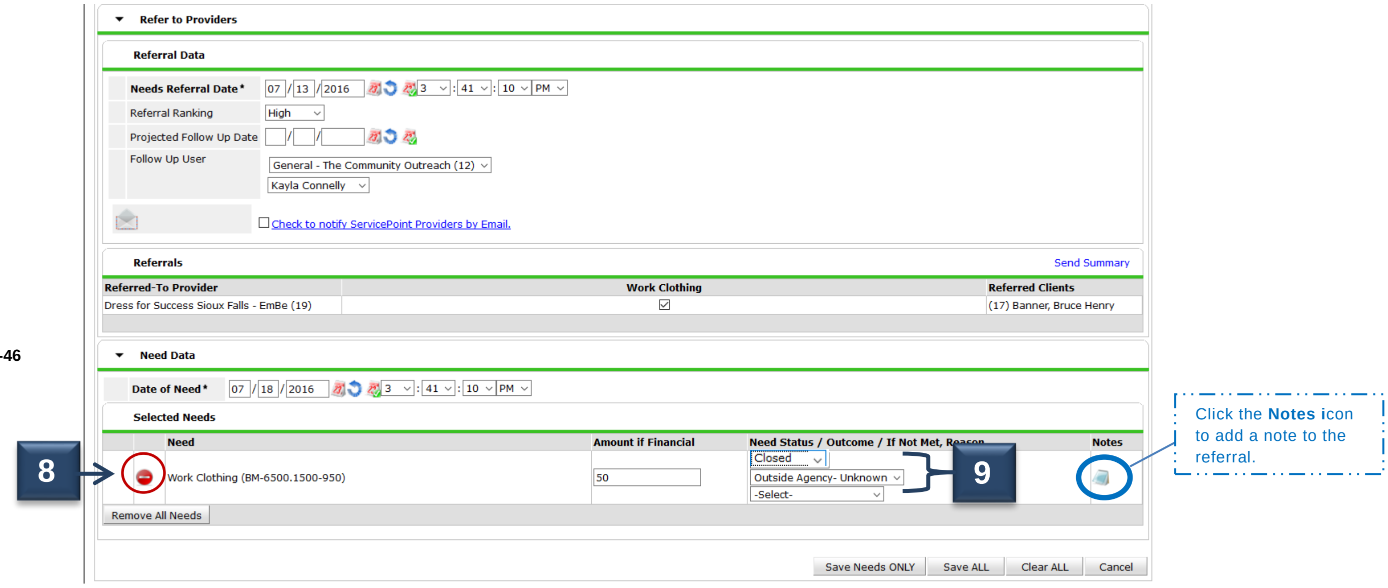


Figure 1-45

9. In the **Referral Data** area, the **Needs Referral Date** will default to the current date. Select a date from the calendar to issue the referral(s) with a different date (*if necessary*).
   a. *If applicable* - complete the additional information: **Referral Ranking**, **Projected Follow Up Date** and **Follow Up User.** (See Figure 1-46)
   b. *If applicable*- The "**Check to notify ServicePoint Providers by E-mail**" check box, when checked, will send an email notification concerning the referral to the referred-to-provider.
10. In the **Referred-To Provider** area the selected provider will be listed, along with the need(s) associated. **(8)**

11. In the Need Data area, **Date of Need** will default to the current date. Select a date from the calendar to issue the referral(s) with a different date *(if necessary).*
12. In the **Selected Needs** area, you can remove a selected need (if necessary) by clicking the remove icon . **(8)**
13. Enter the **Amount if Financial** *(if applicable).* Select the **Need Status / Outcome / If Not Met, Reason**.
    a. **Need Status** and **Outcome** are required. **(9)** (See Figure 1-46)

Figure 1-46



14. Click **Save Needs ONLY** to associate only the needs with the client.
15. Click **Save ALL** to associate the needs and the referrals with the client.
16. Click **Clear ALL** to clear the needs and referrals and remain on the screen to begin again.
17. Click **Cancel** to exit **Add Needs** without retaining needs or referrals

Referral Process

Steps to adding a Referral

1. Use the drop down quicklist to select a Partner Agency. Click **Add Provider**.
    a. **Do not use** Service Code Look-Up or Add Terms & Go To Search Results

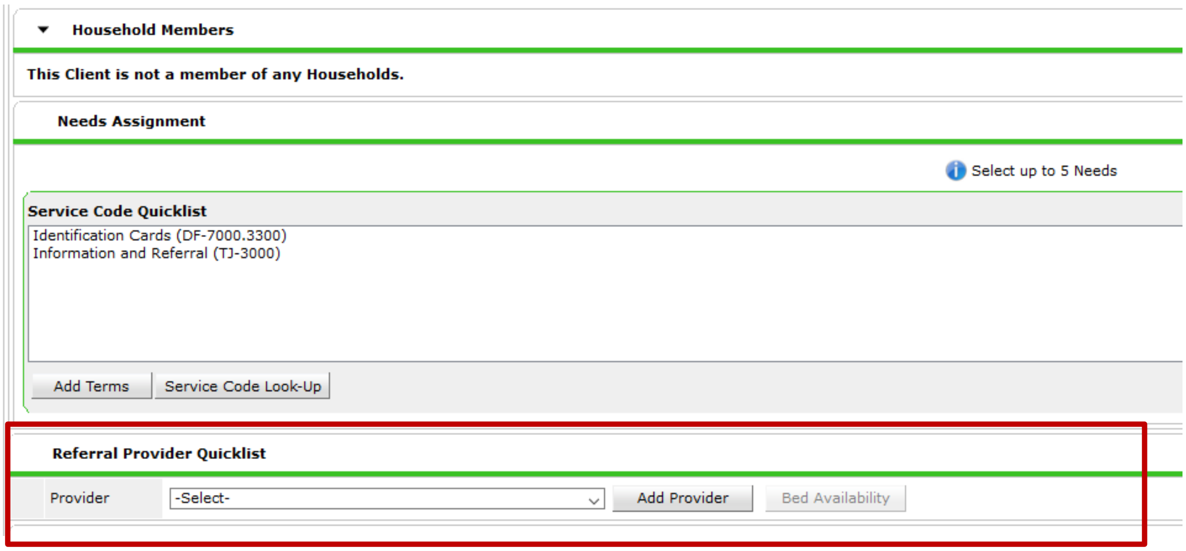
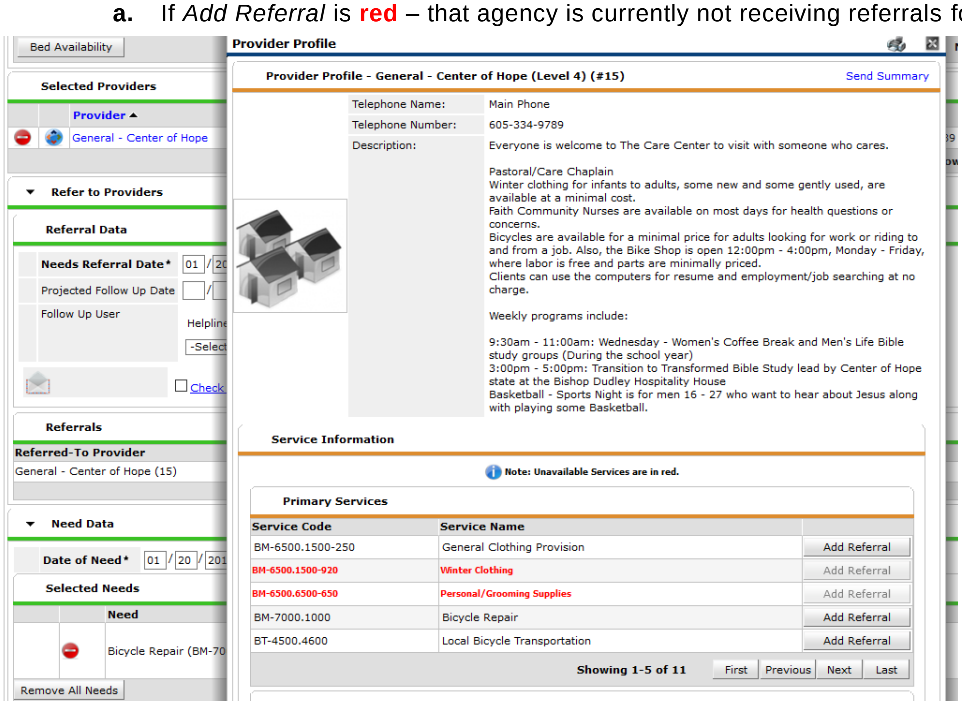


Figure 1-47

2. Click the *hyperlinked* agency name in the **Selected Providers** area
3. Select from the list of referral options for that agency
    a. If *Add Referral* is **red** – that agency is currently not receiving referrals for that service. Cannot select.



4. List Need Status as OPEN.
    a. If applicable – Add Notes to the referral for the receiving agency

Need Status to OPEN – DO NOT complete Outcome