
Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 2

Entry / Exit ~ Case Manager ~ Case Plans ~ Assessments

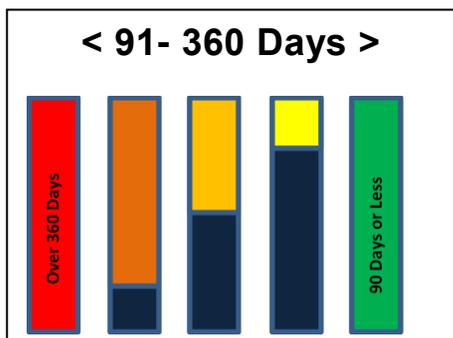


Icon Overview

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 Attachments
	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 Entry / Exit

On the **Entry/Exit** screen the user may alter the information pertaining to the client and their shelter stay.

1. Click the Entry / Exit tab. **(1)** Click **Add Entry / Exit**. **(2)** The **Entry Data** screen will appear.
2. In the Household Members section if the client is not part of a household - **Client is not a member of any Households** will appear. **(3)** Proceed to box number 4. (See Figure 1-30)
 - 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. In most cases, you will ONLY provide services to the primary client or the client 'pre-selected'. Proceed to box number 4.
3. **Provider*** will default to user's current provider. **Type*** should always be listed as **BASIC**. **Entry date*** will default to the current date. **(4)**
4. Click **Save & Continue**. The **Entry / Exit Data** screen will appear. (See Figure 1-31)

Figure 1-30

5. Click the **Edit** icon  to alter the entry or the Basic Intake (SENC) **(5)** - (if necessary).
6. Click **Save & Exit** to return to the Entry / Exit dashboard. To **Edit** the Entry / Exit from dashboard - **Go to step 8.** (If necessary)
7. *If / When* a Client ends their Services - enter an **Exit date.** **(6)**

Figure 1-31

Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination Notes
(17) Banner, Bruce Henry	<input checked="" type="checkbox"/>	07/23/2016					

Client's Street Address	Client's Apartment Number	Client's ZIP	Client's City	Client's State	Current Residence
1000 Umbrella St.	22	57104	Sioux Falls	South Dakota	No
1919 America Street	13	57106	Sioux Falls	South Dakota	Yes
2000 S. Beach Drive		57004	Beresford	South Dakota	No

Contact Method Type	Phone Number/ Email	Send Information via Text?
Email	Gree80@yahoo.com	
Cell Phone	605-444-1234	Yes
Cell Phone	605-822-1245	Yes

Disability Type	Start Date*	Note on Disability
Hearing Impaired	06/26/2016	

Type of Employment	Employer Name	Current employer?
Full Time	Target	Yes
Part Time	Taco Bell	No

8. To edit an Entry / Exit from the dashboard screen. Click the **Edit** icon  next to the **Entry Date**. (6) Click **Save & Continue** to open Entry / Exit to edit. (See Figure 1-32)

Client Information
Service Transactions

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

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

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
 General - The Community Outreach (12)	Basic	 08/08/2016				
 General - The Community Outreach (12)	Basic	 07/26/2016	08/26/2016			
 General - The Community Outreach (12)	Basic	 07/26/2016				
 General - The Community Outreach (12)	Basic	 07/26/2016				
 General - The Community Outreach (12)	Basic	 07/21/2016				
 General - The Community Outreach (12)	Basic	 07/21/2016				

Showing 1-6 of 6

Figure 1-32

Adding a Case Manager

The dashboard counts reports that start with the word "My," such as "My Clients," are designed to return only those clients who have the current user listed as a case manager.

1. Open a client record in **ClientPoint** to link a user to a case manager. Click the **Case Manager** tab. Click **Add Case Manager**.

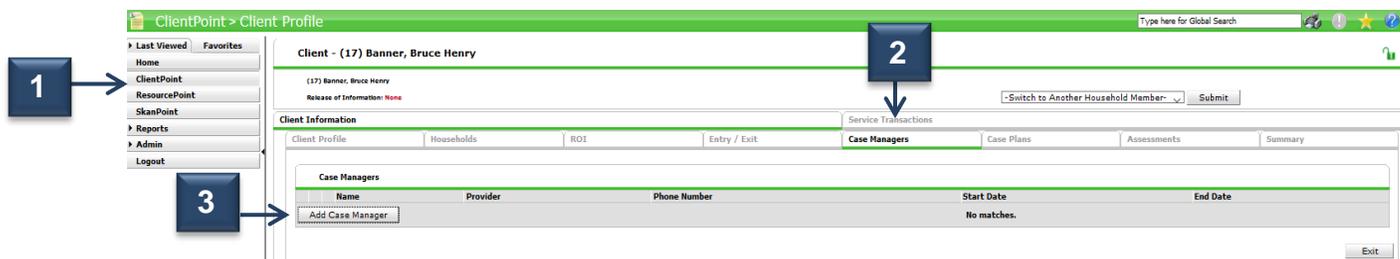


Figure 1-47

2. To include Household members for this Case Manager, if the client is a member of a household click the checkbox(s) next to each client name in the Household Members section. **(3)** If the client is **not** part of a household - **This Client is not a member of any Households** will appear. Only members from the SAME Household may be selected. In most cases, you will ONLY assign a Case Manager to the primary client or the client 'pre-selected'.
3. The default selection is **ServicePoint User**. This setting allows searches of any user in *ServicePoint*. By selecting **Me** this will automatically choose the current user as the Case Manager. Alternatively, **Other** can be selected to enter a name for a case manager who isn't in the system. **(4)** **Select User** from the picklist **(5)** Once a selection is made, click **Add Case Manager**. (See Figure 1-48)

Note: If **ServicePoint User** or **Me** were selected as the **Case Manager Type**, the case manager will be linked to the user.

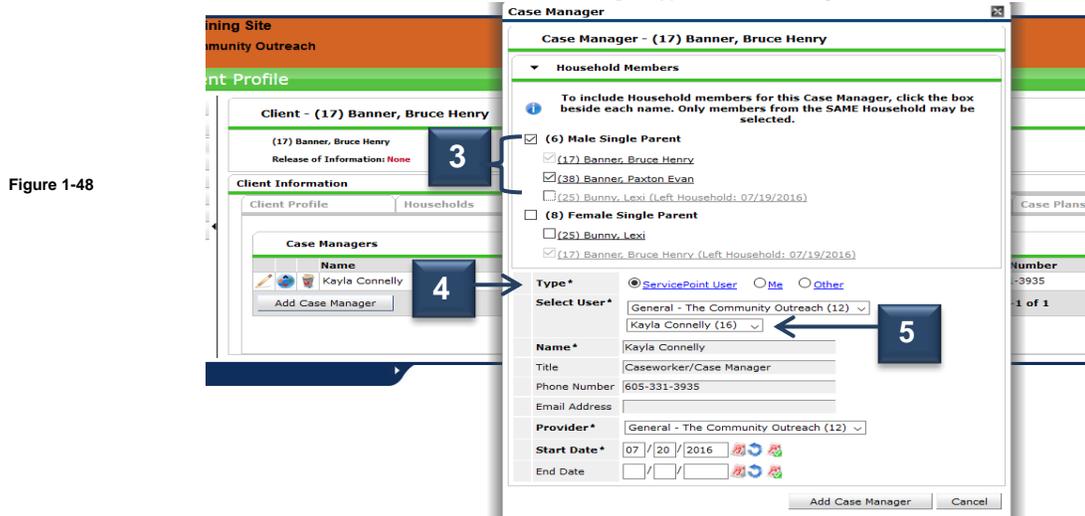


Figure 1-48

4. Click **Exit** to return to the ClientPoint search screen. (See Figure 1-49)

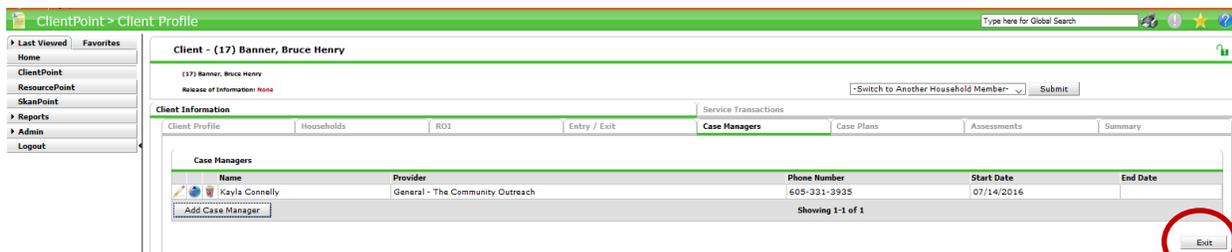


Figure 1-49

Adding a Case Plan (GOALS) - *Case Manager(s) must be selected before adding a Case Plan*

If Case Managers assignment to a client ends – add an end date and select a new Case Manager. Never change the previous Case Manager(s) in a Client Record always add new.

- Once you are working with a client profile, click the gray **Case Plans** tab. (1) The screen will refresh and display the Case Plans screen. (See Figure 1-50) To create a Case Plan, you must have a goal. Click **Add Goal** to open the next screen. (2)

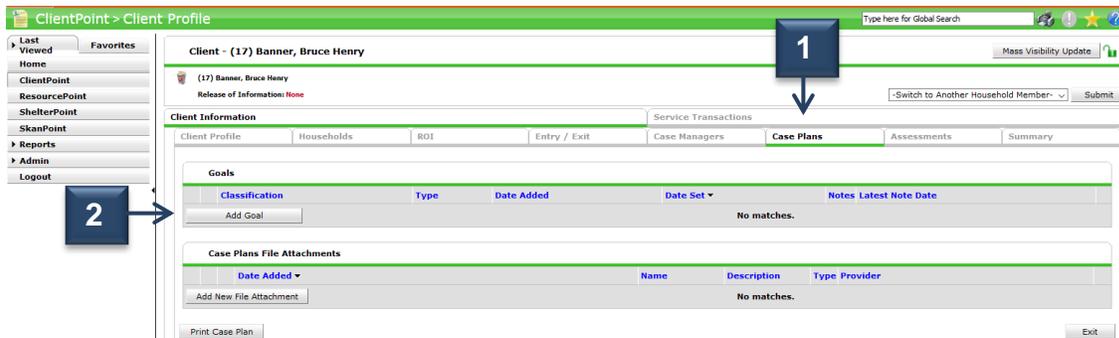


Figure 1-50

- The screen will display the Case Notes, Action Steps Planned and Service Items for this Goal section. Scroll down to see each see area. (See Figure 1-51)

Complete as necessary for your agency Case Plan requirements

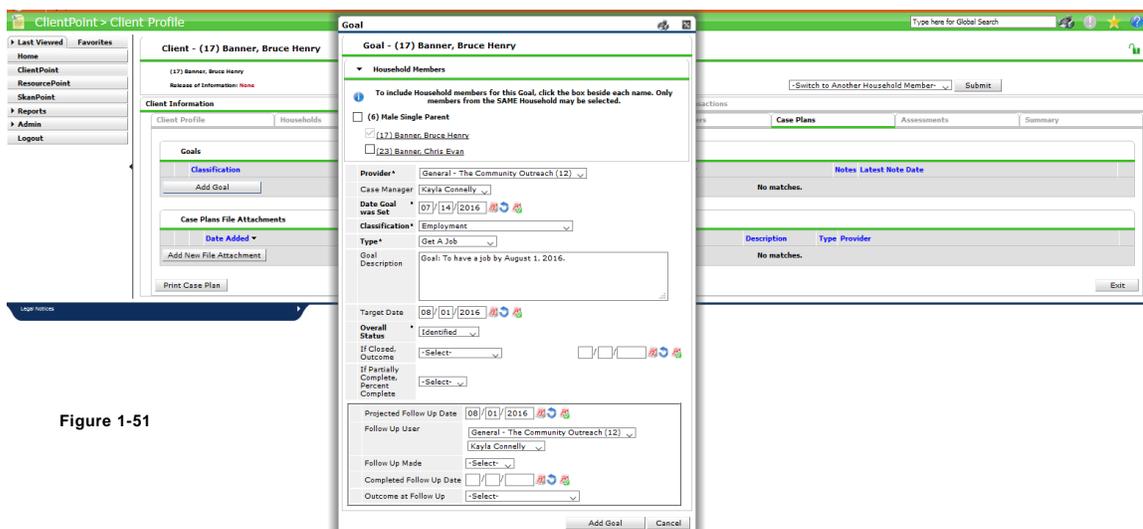


Figure 1-51

Adding Action Steps Planned *A goal must be created to add an Action Plan*

1. Locate the Goal to which you would like to add an action step. Click the **Edit** icon next to the Goal. **(1)** The Goal will open. Scroll down to see the Action Steps. You can add Case Note, Action Steps Planned and Service Items for goal overtime. (See Figure 1-52)

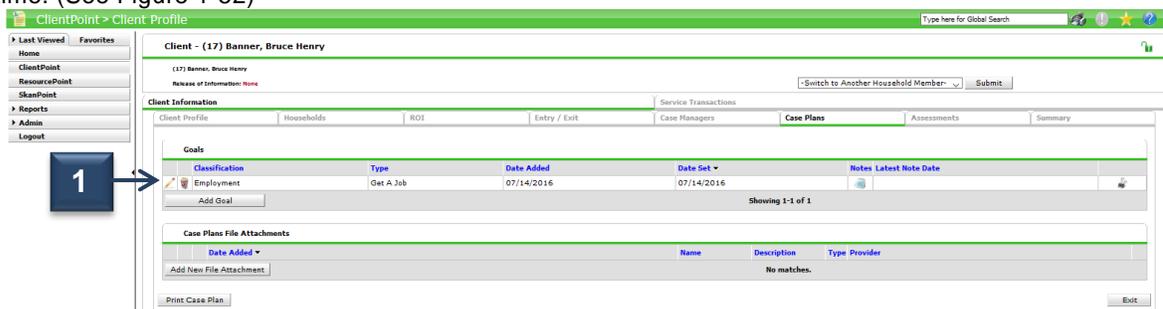


Figure 1-52

2. Click **Add Case Notes**. **(2)** The Case Notes window will display. **Provider** will default to user's current provider. Select **Case Manager**. **Note Date** will default to current date. Add **Notes** to include further information regarding the Goal. **(3)** Click **Save Case Note**. Click **Cancel** to exit without saving Case Note. (See Figure 1-53)

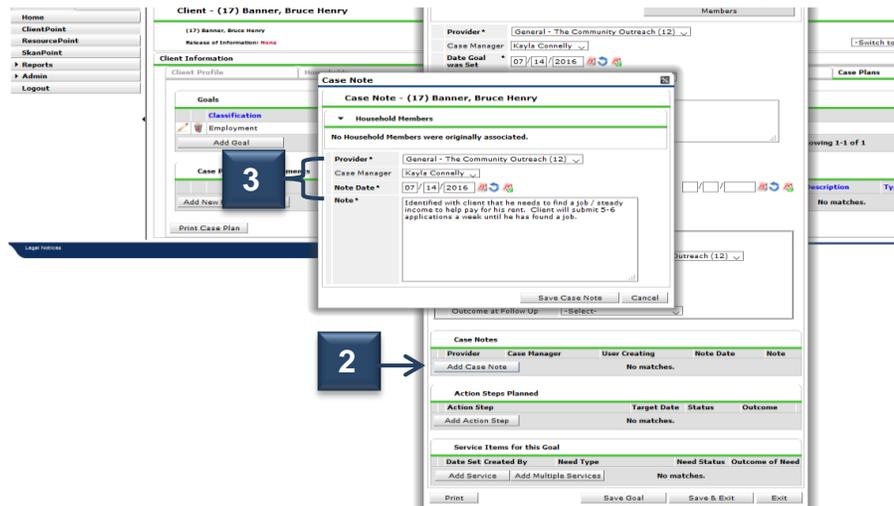


Figure 1-53

3. Click **Add Action Step**. **(4)** The Action Steps Planned window will display. (See Figure 1-54)

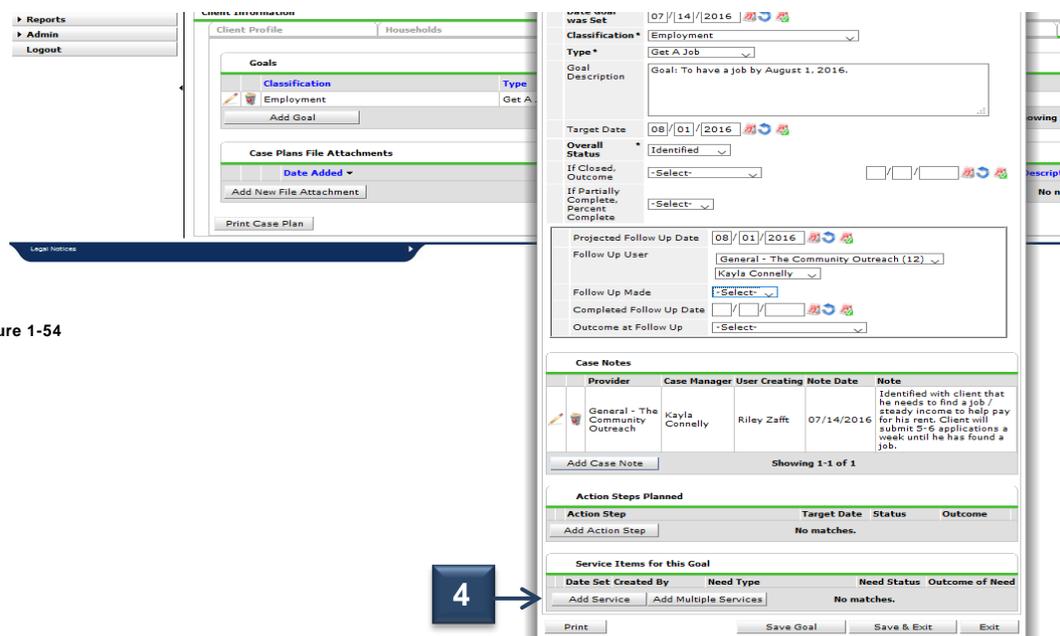


Figure 1-54

4. **Complete each field in the Action Step section:**
 - a. By default, the **Provider** associated with the action step will display.
 - b. The **Date Action Step was Set** in mm/dd/yyyy format or use one of the date auto-fill icons. By default it will be set to the current date. **(5)** (See Figure 1-55)
 - c. Describe the step in the **Action Step** text box. **(6)**
 - d. Enter the date by which the action step should be completed in the **Target Date** field **(7)** or use one of the auto-fill icons.
 - e. Select the **Overall Status** of the action step from the picklist provided. **(8)**
 - f. **If Closed, Outcome:** there may be a possibility that the case plan is entered and the goal may be met on the same day and it is being entered in one step. If so, select the outcome and date of outcome. **(9)**
5. **Complete each field in the follow up section:**
 - g. **Projected Followup Date:** If there will be a follow-up on this action step, enter the date you anticipate the follow-up will take place or select from one of the auto-fill icons. **(10)** (See Figure 1-55)
 - h. **Follow Up User:** This is the user who is assigned to follow up with the client. A picklist of available users appears based on the provider. Click **My Provider** to select your default provider for which the user list will be associated. Select the user from the pick list. **(10)**
6. **Once the follow up has been complete follow up made section:**
 - i. **Follow Up Made:** Select the status from the picklist. **(10)** (See Figure 1-55)
 - j. **Completed Follow Up Date:** Enter the date the follow-up was completed or select from one of the auto-fill icons. **(10)**
 - k. **Outcome at Follow Up:** Select from the options in the picklist. **(10)**
7. Click **Save Action Step**. The Action Step Data window will close. The Action Step screen will refresh and display the action step details in the Action Steps Planned section. (See Figure 1-56)

The screenshot shows the 'Action Step' form for '(17) Banner, Bruce Henry'. The form is divided into several sections. Callout 5 points to the 'Date Action Step was set' field, which is currently '07/26/2016'. Callout 6 points to the 'Action Step' text box containing 'Bruce Banner needs to show proof of insurance.'. Callout 7 points to the 'Target Date' field, which is '08/01/2016'. Callout 8 points to the 'Overall Status' dropdown menu, which is set to 'Identified'. Callout 9 points to the 'If Closed, Outcome' dropdown menu, which is set to '-Select-'. Callout 10 points to the 'Projected Follow Up Date' field, which is '08/01/2016'. Other fields include 'Provider' (General - The Community Outreach (12)), 'Follow Up User' (Kayla Connelly), and 'Follow Up Made' (-Select-). The form has 'Save Action Step' and 'Cancel' buttons at the bottom.

Figure 1-55

8. Click **Add Service** in the Service Items for this Goal area. (See Figure 1-56) Since you will be taken to another screen, a warning window will appear to make sure you want to proceed. Click **Ok**. **(11)**

The screenshot shows the 'Action Steps Planned' section with a table containing one row: 'Bruce Banner needs to show proof of insurance.' with a target date of '08/01/2016' and a status of 'Identified'. Below this is the 'Service Items for this Goal' section, which has a table with columns 'Date Set Created By', 'Need Type', 'Need Status', and 'Outcome of Need'. The table is empty, and the text 'No matches.' is displayed. Callout 11 points to the 'Add Service' button in the 'Service Items for this Goal' section. Other buttons include 'Add Multiple Services', 'Print', 'Save Goal', 'Save & Exit', and 'Exit'.

Figure 1-56

- The Service Transactions window will appear. Complete **Add Service** section. See **Adding a Service** process in Section 2. The Service will now be attached to the Case Plan.

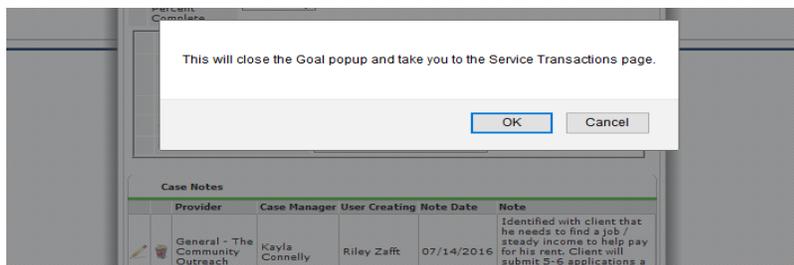


Figure 1-57

Assessments

Assessment can be created for each agency to fit their necessary need. Assessments are not globally shared.

- If your agency has an assessment created in SENC – click the **Assessments** tab. **(1)**
- Click the drop down arrow under Select an Assessment. Click **Submit. (2)** (See Figure 1-57)
- The assessment will appear. Complete assessment and click **Save** or **Save & Exit**.

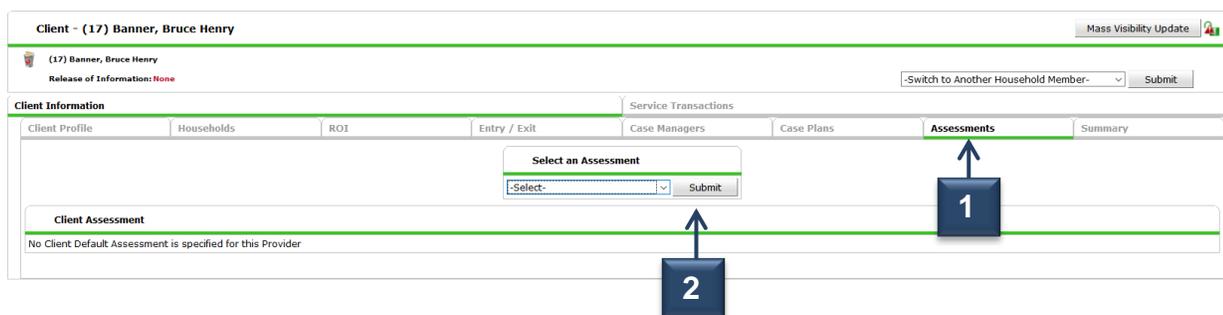


Figure 1-57