Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 2

Entry / Exit ~ Case Manager ~ Case Plans ~ Assessments

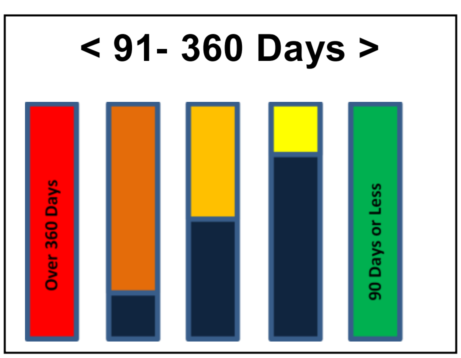
If you have any questions contact Riley Amundson at 605-274-1446 or senc@helplinecenter.org

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 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 <u>ONLY</u> 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 <u>*BASIC*</u>. **Entry date*** will default to the current date. **(4)**
4. Click **Save & Continue.** The **Entry / Exit Data** screen will appear. (See Figure 1-31)

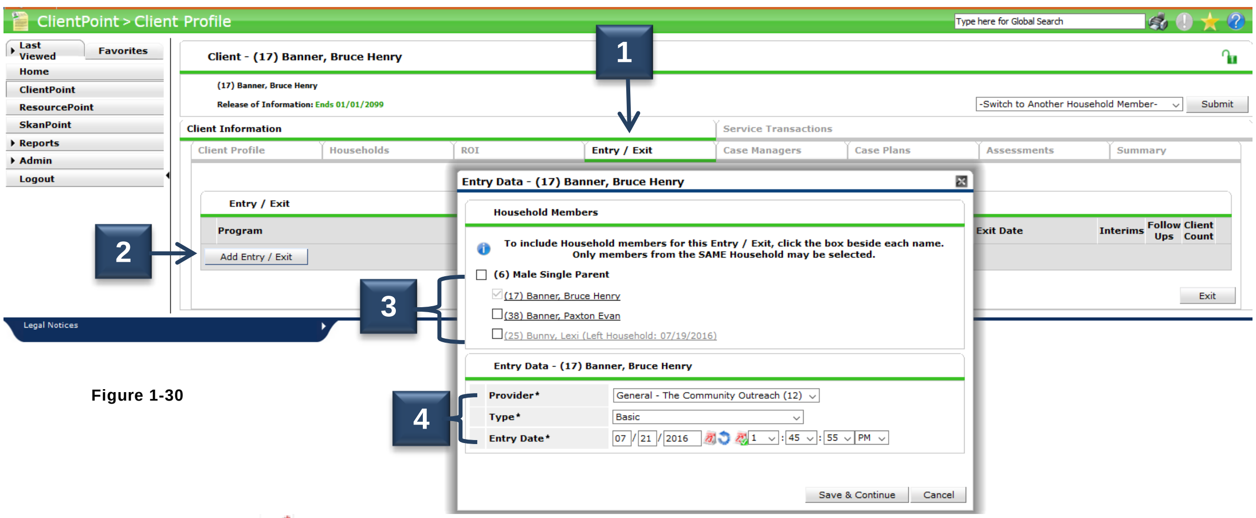


Figure 1-30

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)**

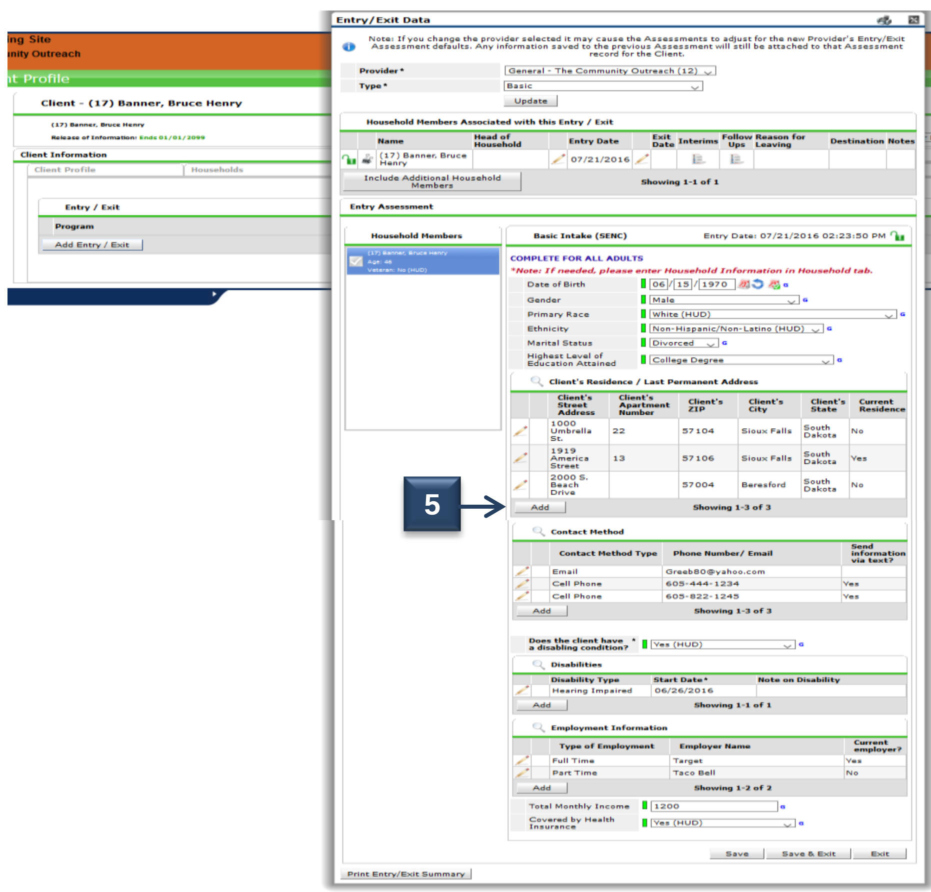


Figure 1-31

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)

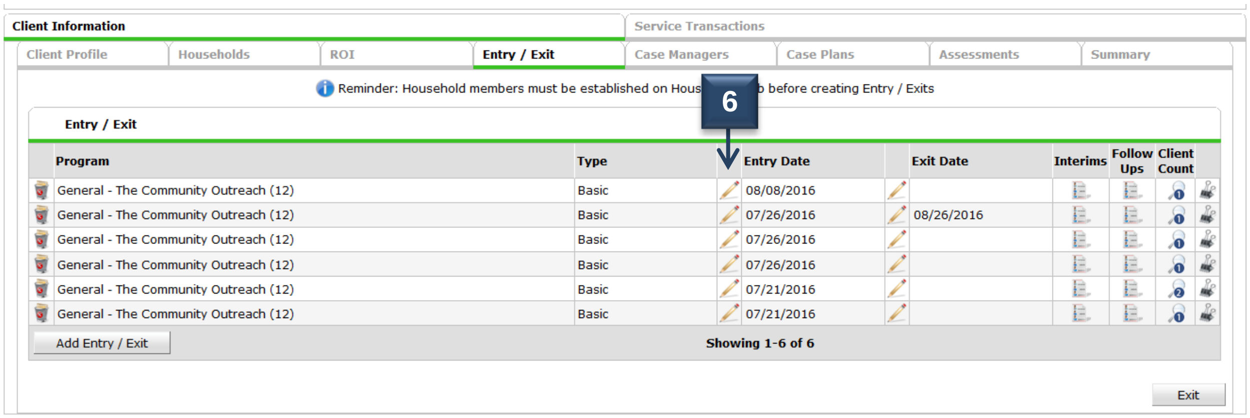


Figure 1-32

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**.

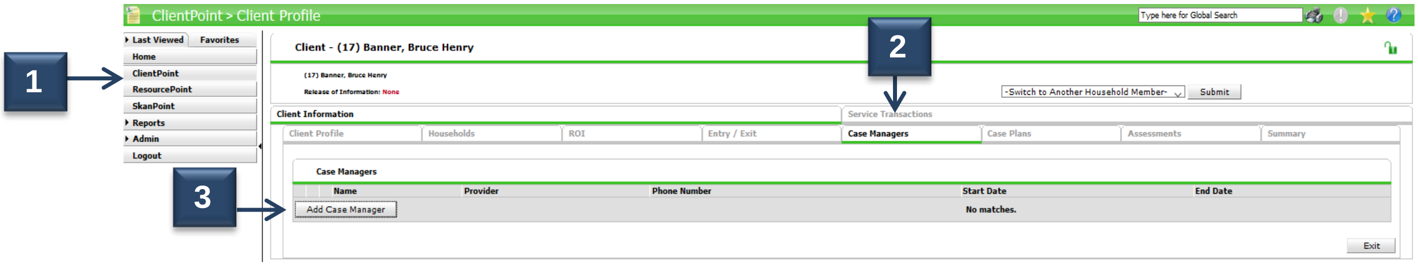


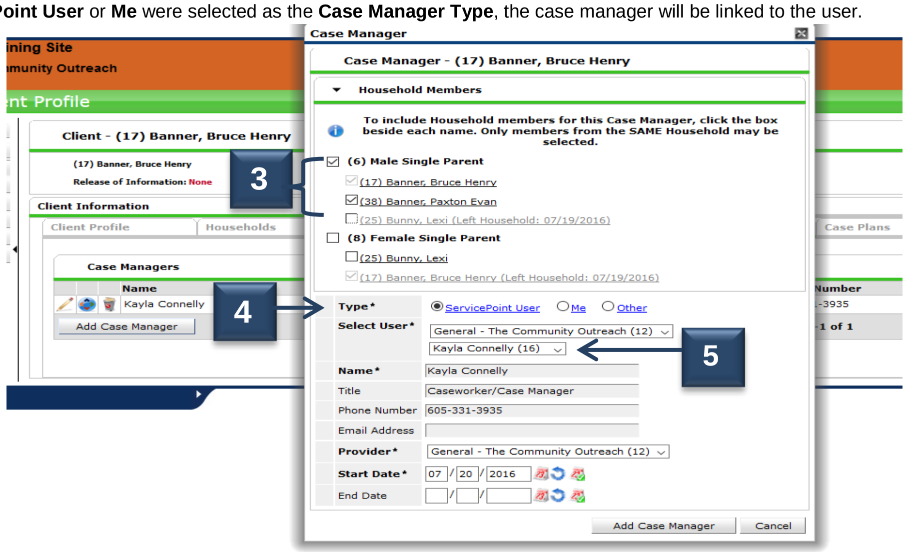
Figure 1-47

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. <u>In most cases, you will ONLY assign a Case Manager to the primary client or the client 'pre-selected'.</u>

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)

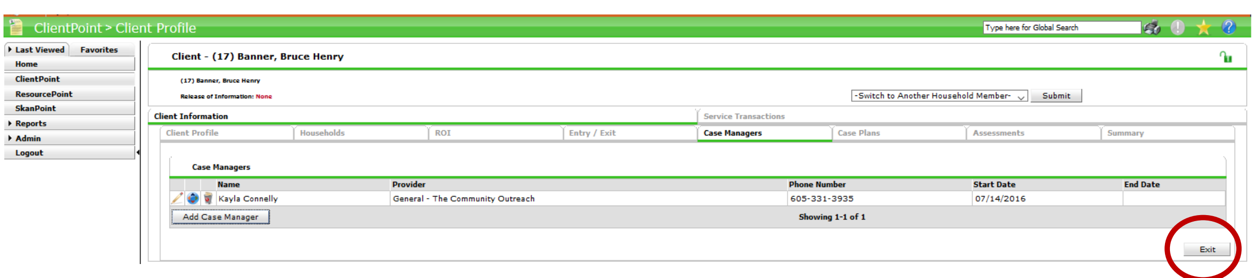


Figure 1-49

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.

1. 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)**

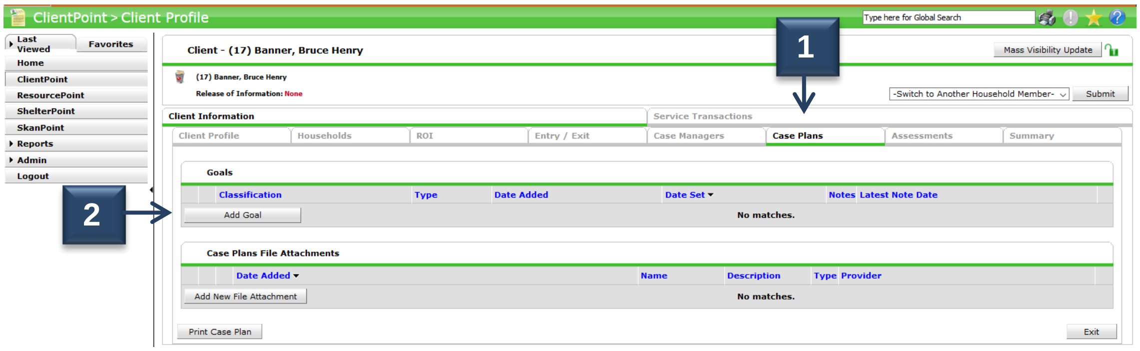


Figure 1-50

2. 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

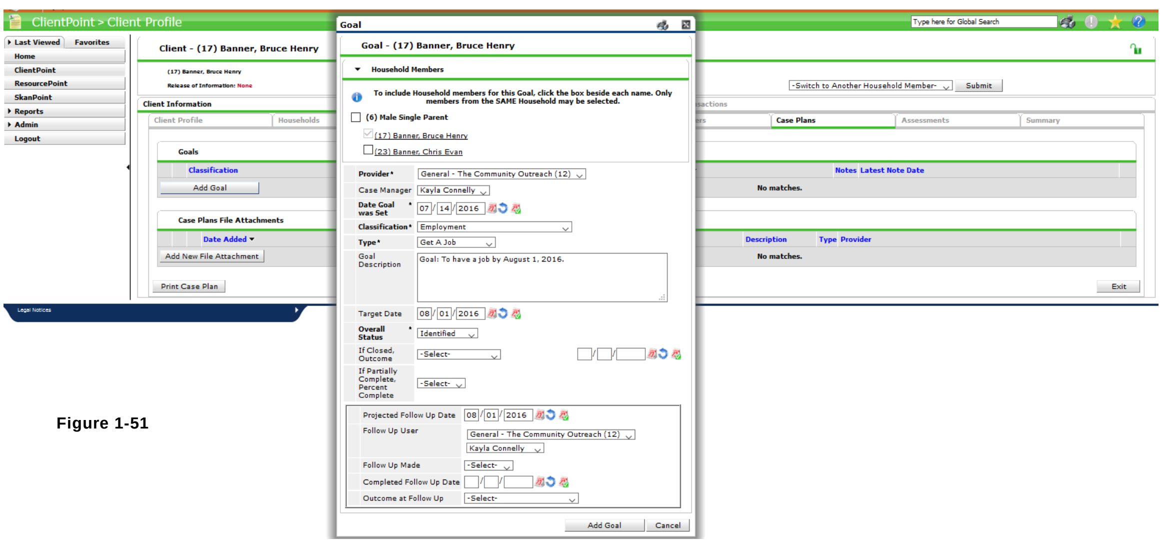


Figure 1-51

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)

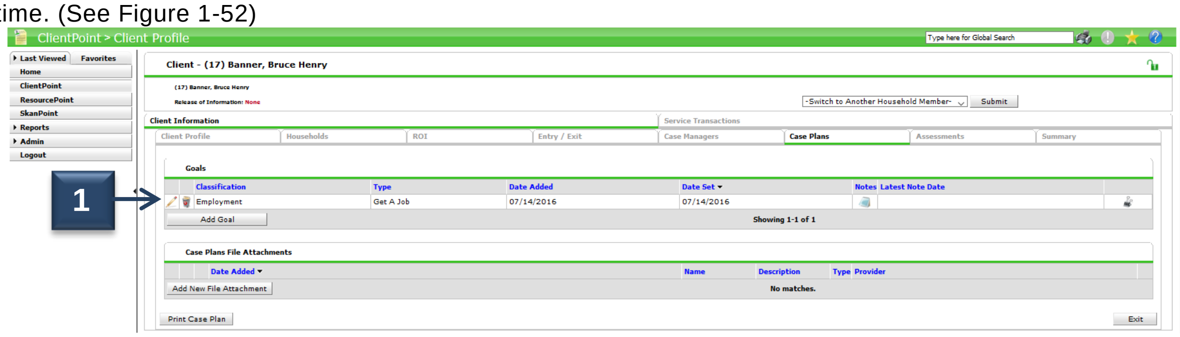
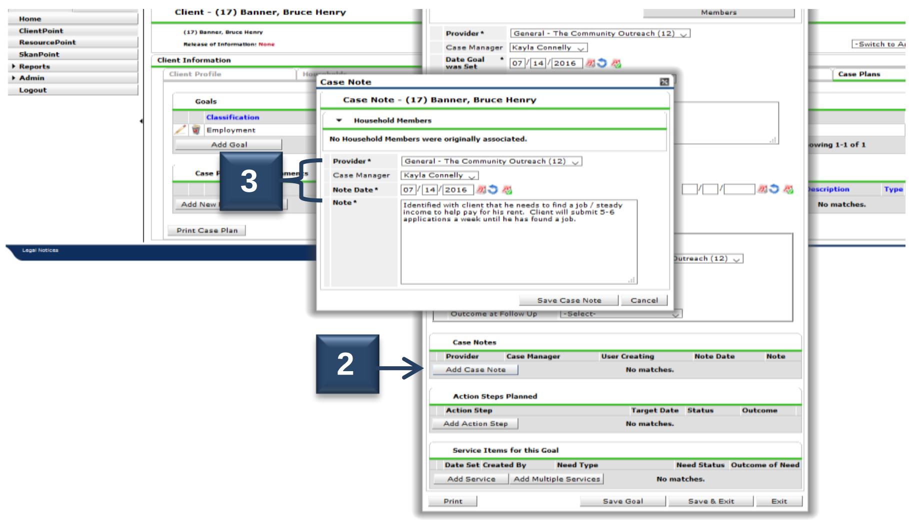


Figure 1-52

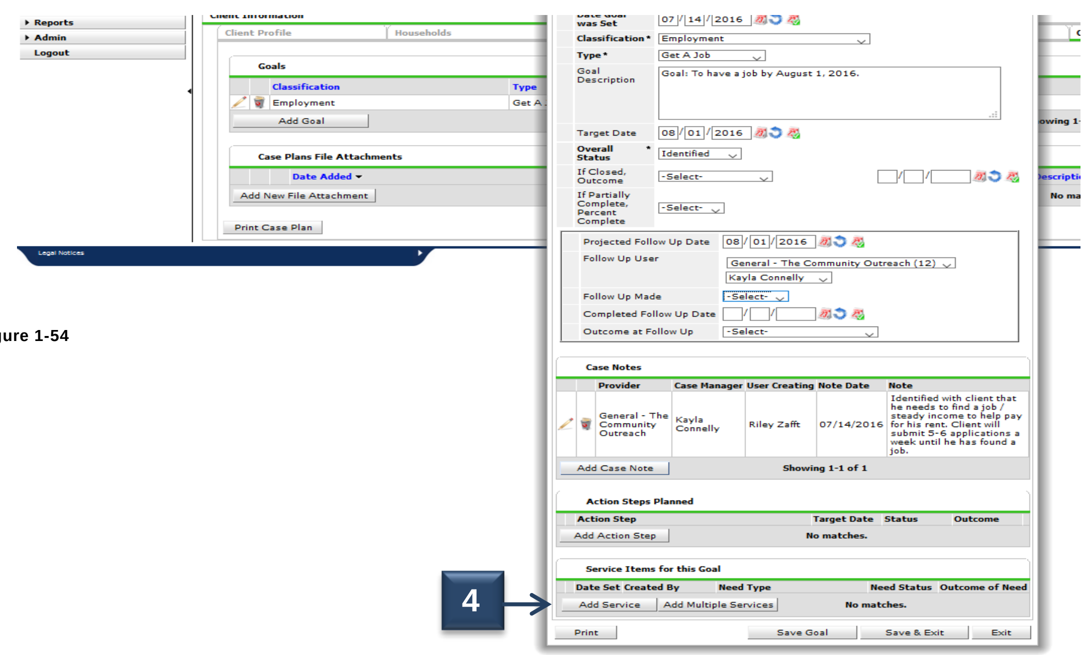
2. Click **Add Case Notes**. **(2)** The Case Notes window will display. **Provider** will default to user's current provider. Select **Case Manager. Note Date** will default to current date. Add **Notes** to include further information regarding the Goal. **(3)** Click **Save Case Note.** Click **Cancel** 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)

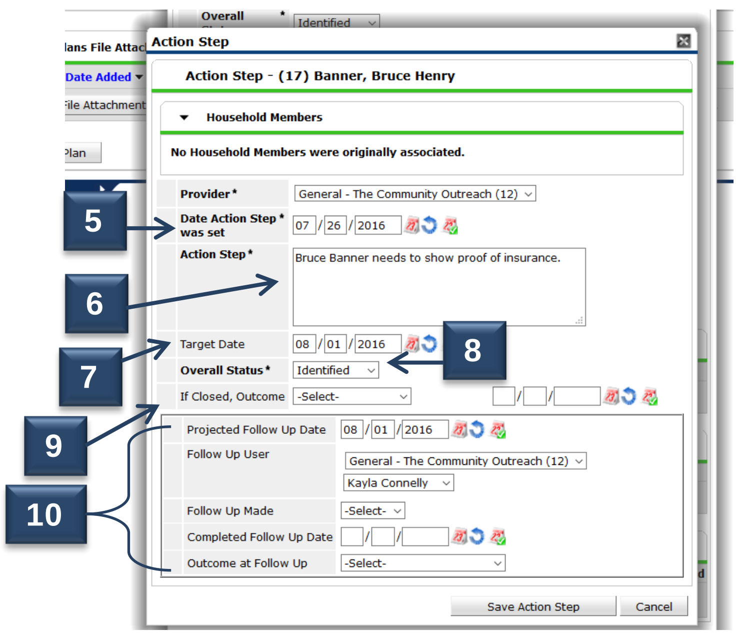


Figure 1-55

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)**

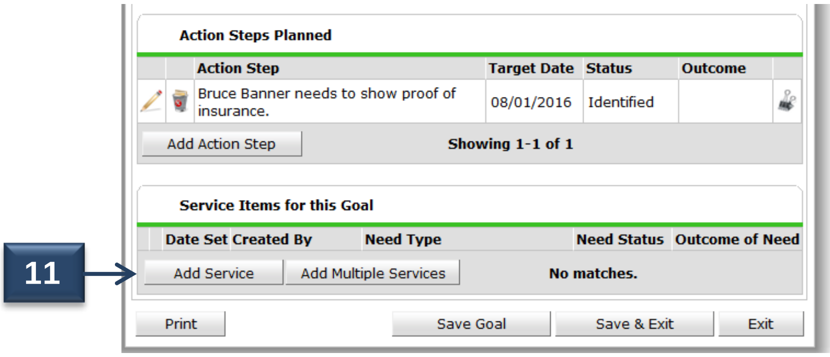


Figure 1-56

9. 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.

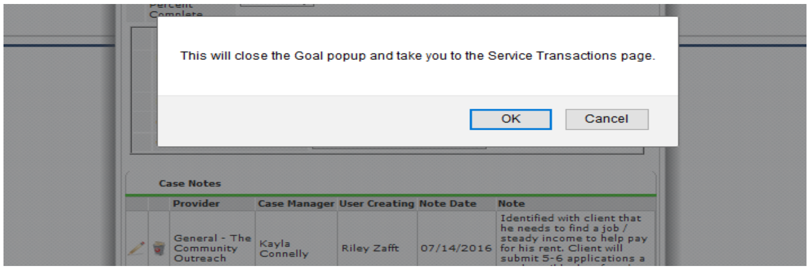


Figure 1-57

Assessments

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

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

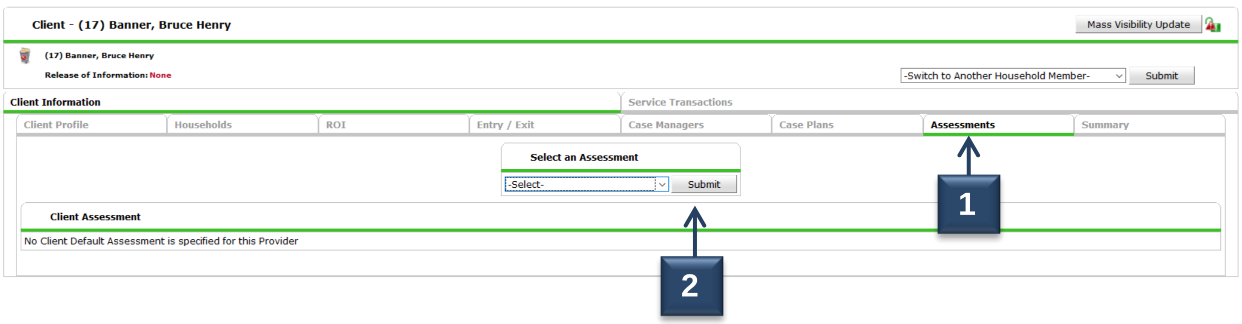


Figure 1-57