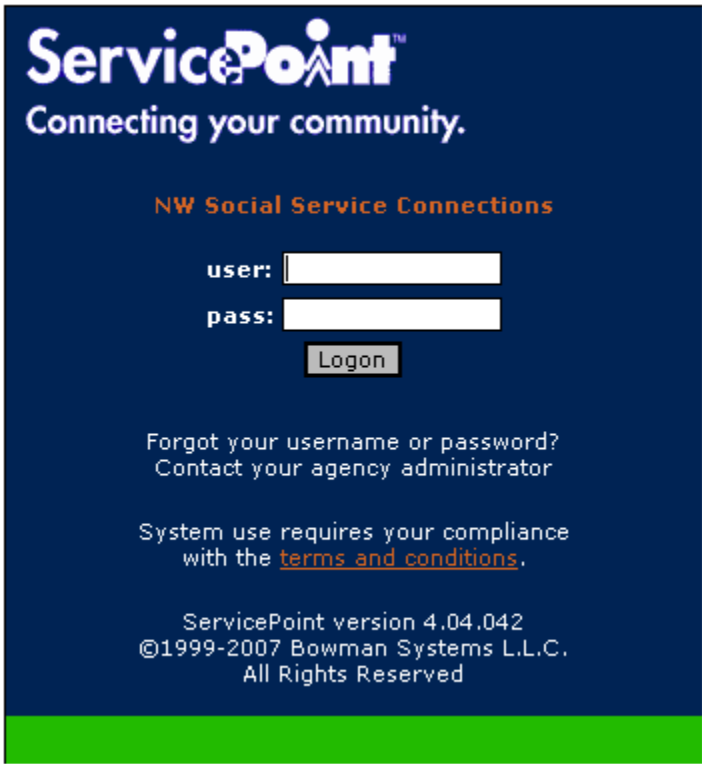
Last updated 2/10/2010

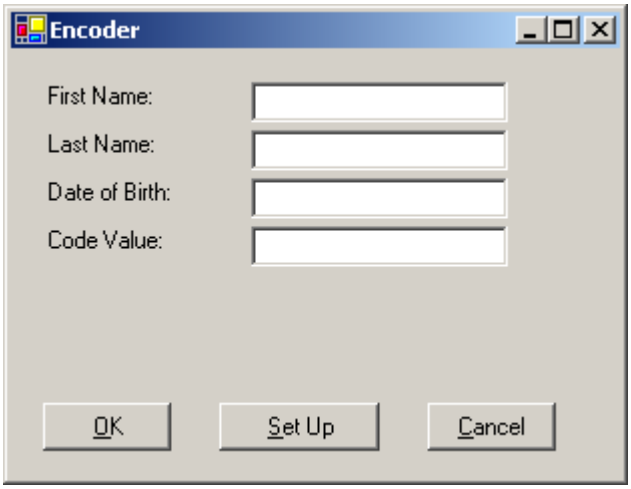
Service Point User Guide for Multnomah County Domestic Violence Agencies



Contact us at dvservicepoint@co.multnomah.or.us

ServicePoint Data Entry Steps:

1. Using the Encoder program, create a client ID code for the head of household/main client. **Important: you must use all "real" information when creating this code!** This code will be used for all family members in ServicePoint in lieu of the last name field. Copy this code from Encoder to use in ServicePoint in the last-name field.



2. Make sure that you have the latest version of the PKI (Public Key Infrastructure) certificate installed. You will not be able to log on without the PKI. Contact your Agency Administrator if you do not have the PKI.

3. **Log-in** to ServicePoint https://portland.servicept.com/comp using your user name and login. With the current ServicePoint structure, you should enter data at the "top" level of your agency tree. Your log in defaults to the top level. Do NOT use the "enter data as" function to add information.

4. **Create or find client:** Search for/select the correct client (you can find existing clients using the 5-digit Client ID for OR enter the first and last name codes from Encoder). To create a new client, enter the code generated from the Encoder program in the last name field and use the guidelines below for first name. Make sure you select "Exact Match" or you will see all your agency's client records in ServicePoint!

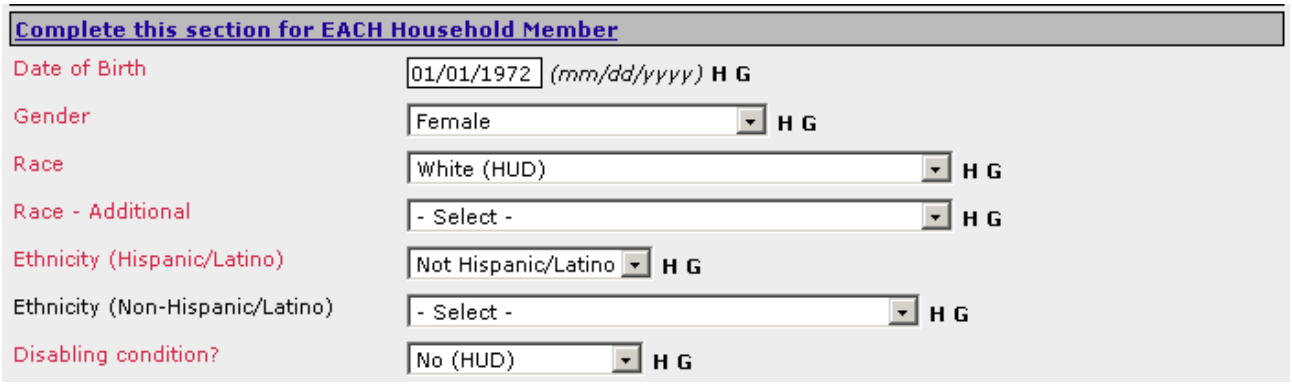
Data Entry Guidelines (substitutes for client-identifying information in ServicePoint)	
Last Name	Use the same code generated by Encoder for all family members. **Note: If you have an open client record with the "long" last name code from the old version Encoder, please update it with the new Encoder so we can get a better estimate of "unduplicated" households.**
First Name	Use HOH for head of household/main client. Use 1Child for oldest child; 2Child for next-oldest child; etc. Use 1Adult for other relatives in the household who are *served by your*

	program but who are not your primary client. (For example, a grandmother accompanying your client and her children to shelter). **Note: We are asking you to make this change from the previous naming pattern so we can try to get a better unduplicated count from ServicePoint. Please update existing client records as you use them.**
Date of Birth	Use 01 for month, 01 for day, and ACTUAL YEAR OF BIRTH.
Social Security #	Skip/leave blank the actual number field. However, you must answer "Refused" in the social security data quality question.
Race	Provide the client's self-identified race in the first race field. Only use the "Race-Additional" field if the client self-identifies as more than one race.
Ethnicity	You must indicate whether the client is Hispanic or non-Hispanic.

Note: No match should be found. If match is found, then this client may have already been entered in ServicePoint (for example, she received services from another program within your agency or she is a previous client returning for service). If you are unsure, click on the record to review the "Profile" page. If the demographic information is the same as your client, then they are probably the same person. If so, you may skip ahead to the Entry/Exit step.

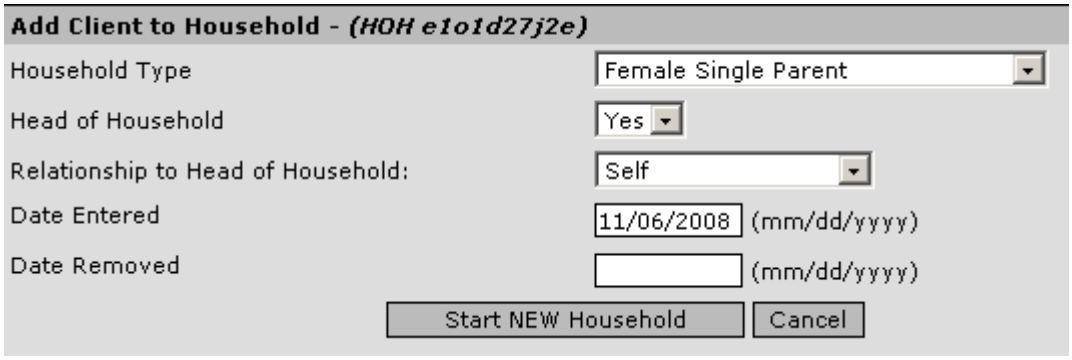
5. **Client profile:** In the Client Profile Page, you will find instructions on creating new clients. You must create a household and add basic demographic information here. Use the "Backdate" mode if you're creating a new client, or review and verify the information's accuracy if you are adding to an existing client record.

    a. **Client Profile Information:** If you are creating a new client record in ServicePoint, you may add basic demographic information here. Either use the assessment "Backdate" feature (using the date the client actually entered your program) to complete the demographic information here, or for head of household, you can wait until you get to the Entry/Exit Step.



    b. **Create Household:** All clients must be part of a household (even single individuals). Please indicate each person's relationship to the "HOH"(your main client), and whether or not this is the head of household. Your main client is always considered the head of household while in your services, even if they still live with a

partner or husband. In other words, for your main client, the Head of Household question should always be answered "Yes" and the Relationship to Head of Household should always be answered "Self". You will add children or other household members here. Click on Household Information at the top of the Profile screen. Click on Start New Household button. Fill in the appropriate information for the household type using the drop down menus (see example below). Make sure date entered matches the date your client entered the program. Click Start NEW Household.



Add other household members: There are two ways to add a new household member.
First way to add a new household member (see screen shot on next page)

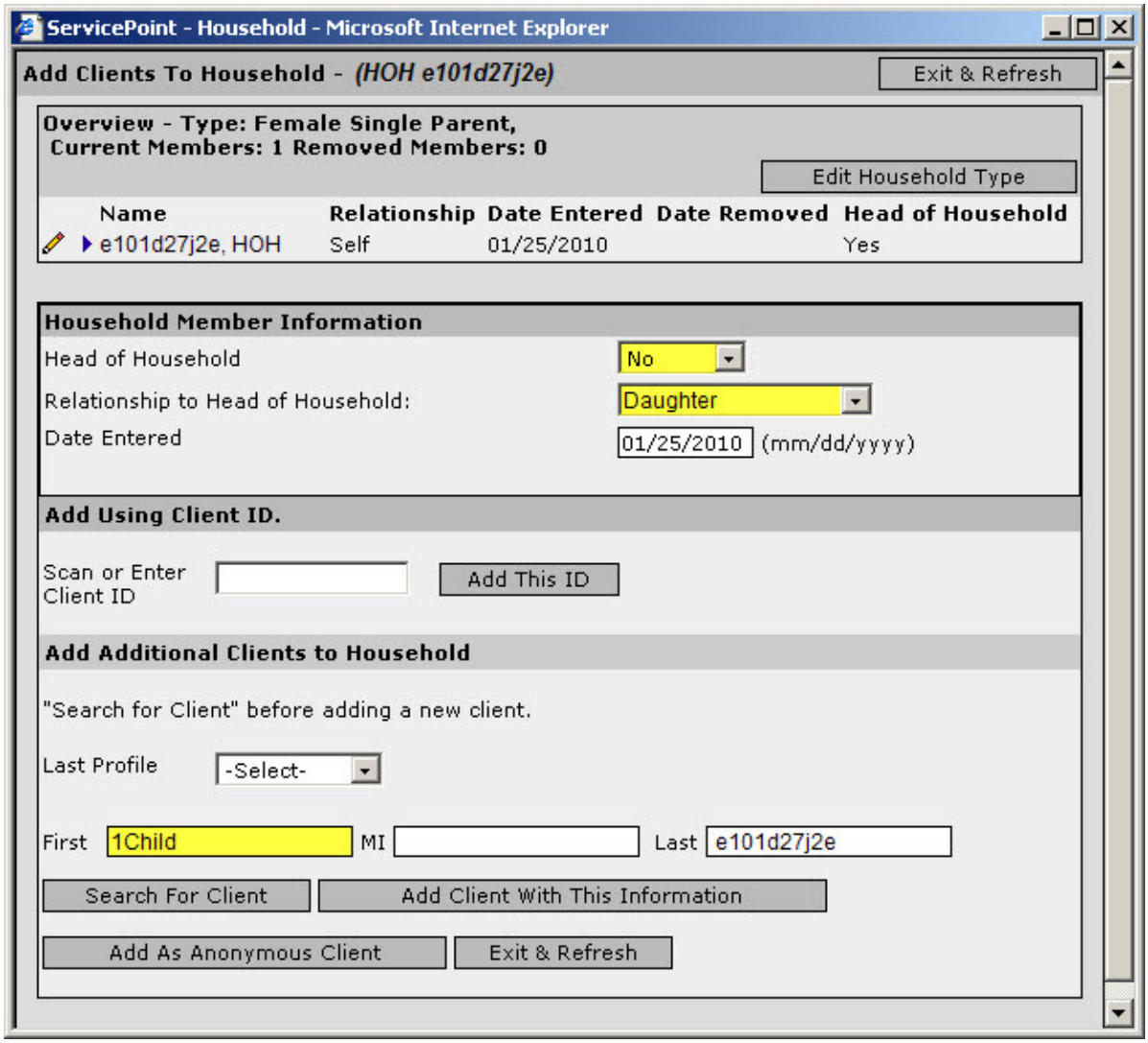
1. After completing the Head of Household information, start answering the the questions in Household Member Information as they pertain to the member you are now **adding.**

2. Enter the first name of the new household member (1Child, 2Child, etc.

3. Click on **Search For Client** (be sure to also click on "exact match").

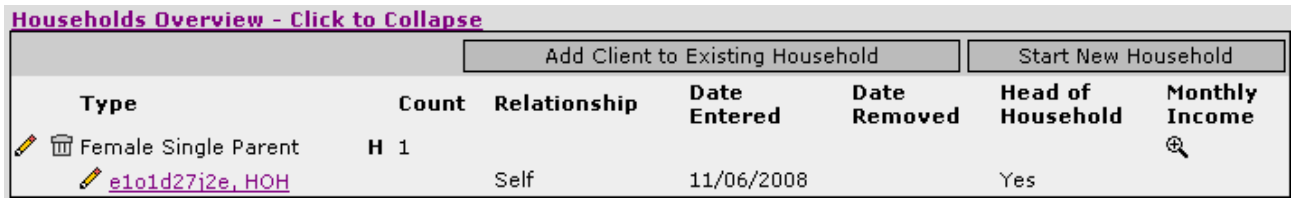
4. If the client is shown in "possible matches," click the client's name to add her to the household.

5. If the client is not shown in the "possible matches," click on Add Client With This Information.

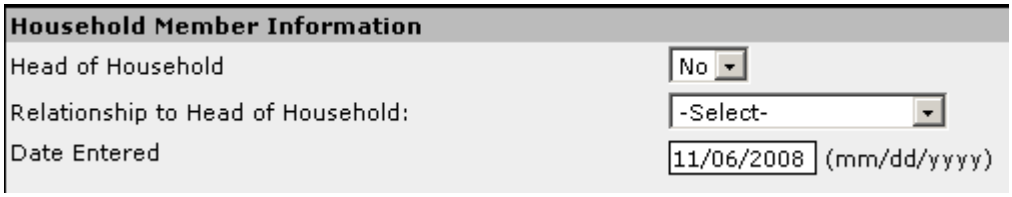


<u>Second Way to Create a New Household Member:</u>

1. Click on the pencil next to the Household type.

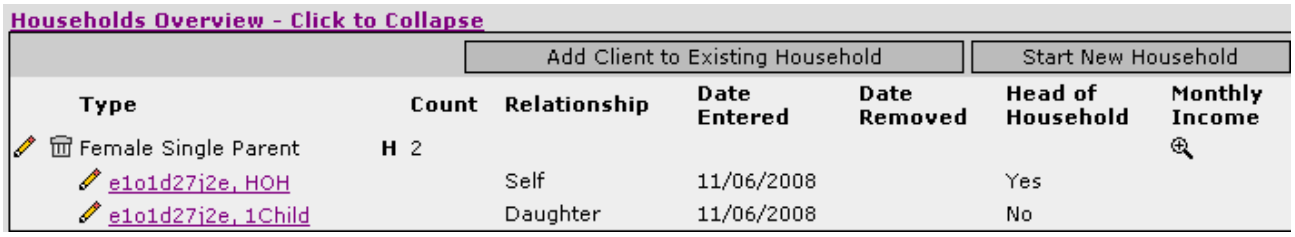


2. Fill in Household Member Information (head of household =no, Relationship to head of household=daughter, son, etc)



3. Click on Add Client With This Information button at the bottom of the screen.

When you are finished creating your household, the Household Overview should look something like this:

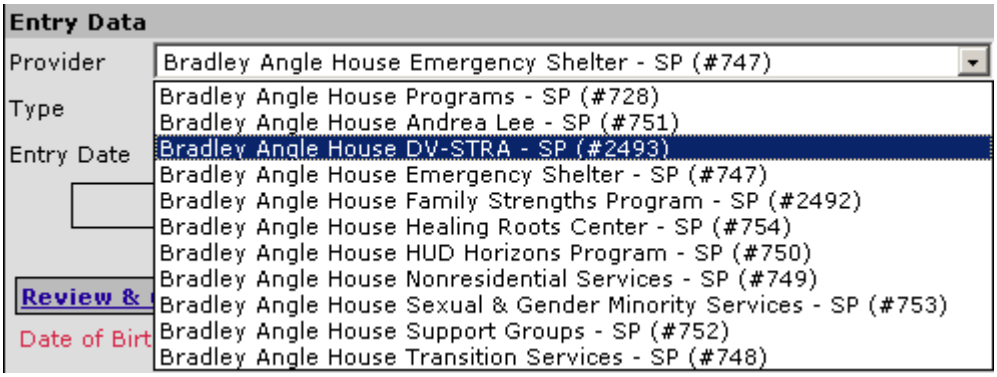


c. **Complete the required demographics in the Client Profile section for all household members.** At this point, you will have only completed the required demographic information for the head of household. You should update the demographics (birthdate, race, ethnicity, etc) for all other household members before moving on to entries/exits. The "Household Information"/"Household Overview" section is the easiest place to move between household members. To get to the other household records, go to the "Household Overview (If you don't see the list of names like the picture above, you will instead see "Household Information – 1 Household -Click to expand" – click on that). Next, click on the household member whose record you want to view or update. Wait for the screen to refresh then verify that you have the correct record before making changes or additions. For most programs (except HUD), demographic information in the Client Profile screen is the only required information for these additional household members.

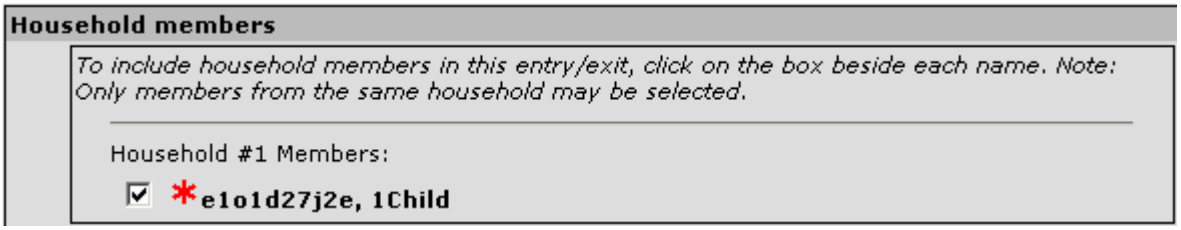
6. **Add an ENTRY** under the your correct provider in ServicePoint

- Click on orange Entry/Exit icon in upper right corner

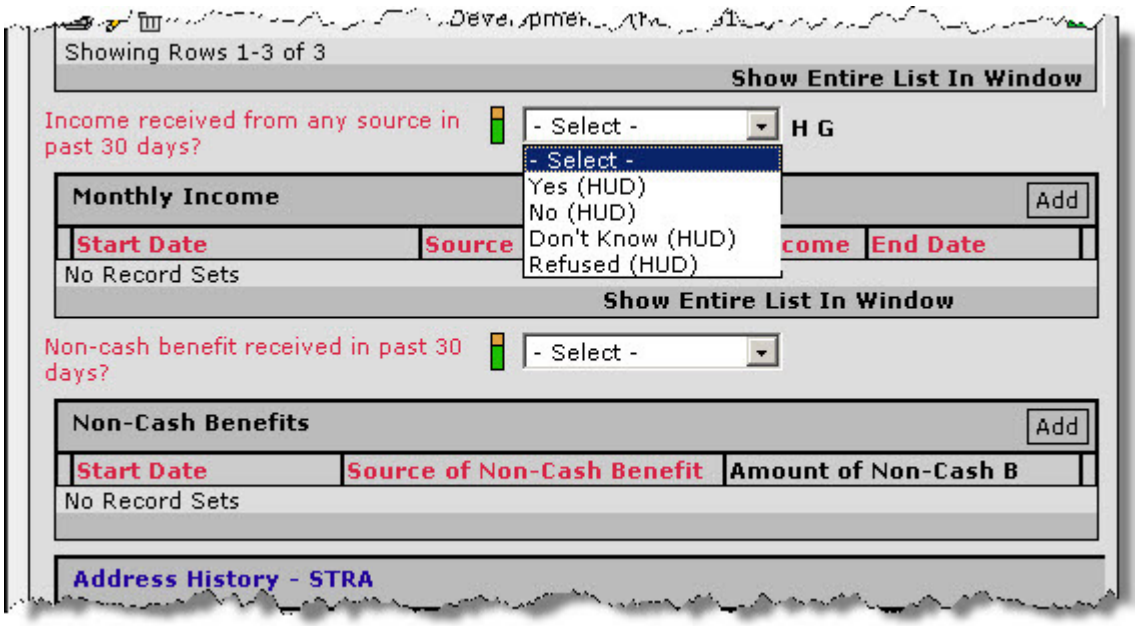
- Select the correct Program/Provider (visible in drop-down list). Note that clients can be entered in multiple programs within your agency at the same time (by creating a separate entry).



- Entry Type: Select "Basic" entry/exit for all program *except* HPRP and HUD and Family Strengths.
    - Family Strengths and HUD programs must use the "HUD-40118" entry/exit type.
    - HPRP programs must use the HPRP entry/exit type.
- Entry Date: the first day of service or the day the client entered THIS program. Note that the STRA program has more detailed requirements for determining the "entry date." Consult your STRA guide.
- Click the boxes next to children to include in the entry/exit record.



- Complete all assessment questions for the Head of Household, including **Monthly Income & Non-Cash Benefits.** If the client has no income, you may answer the question "Income received from any source in the past 30 days?" and skip to the Non-Cash Benefits questions. If either Income or Non-Cash benefits were received, click "Add" to enter the Income or Benefits in the subassessment.

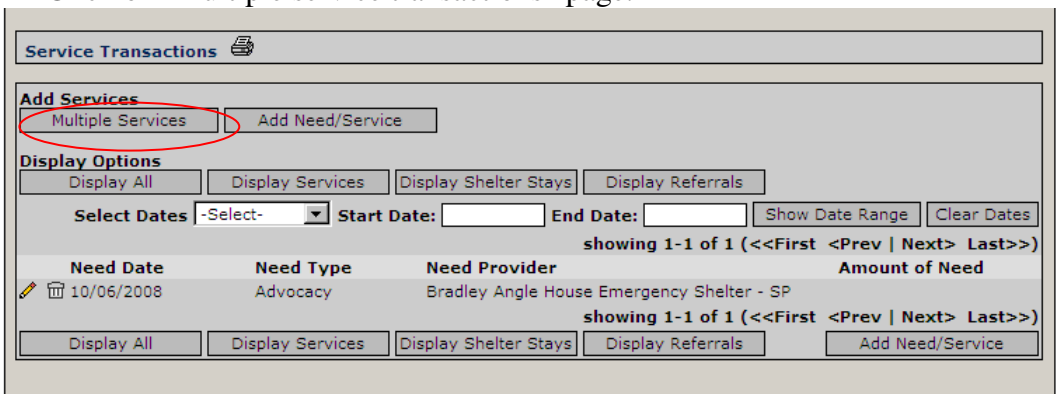


- Enter income information and click Save and Exit or Save and Add Another. If income ends or changes, update income information accordingly.

7. Add Services

- Click on Service Transactions at the top of the page

- Click on "multiple service transactions" page.

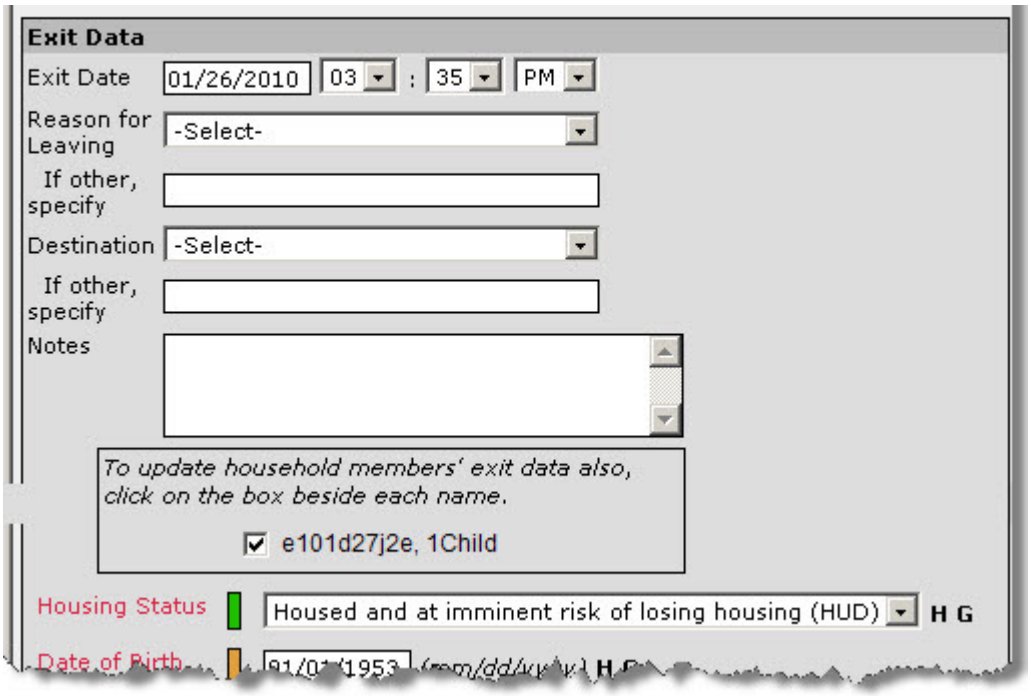


- You can scroll down to click on a small box to select the service type from your drop-down list.
    - Select the provider providing the service (visible in drop-down list)
    - Set the Service Start and End dates
    - If required, list the cost of service AND the fund source.
- To see the list of past services provided, click on "Display Services." To see the list of needs, click on "view past needs."
- *Note:* once the need has been entered, you can add services using the process above, or you can additional services can be added to the previously identified need. To add additional services to the same need, click on "view past needs," select the need, and then add the new service with new service provider/dates/costs/etc.

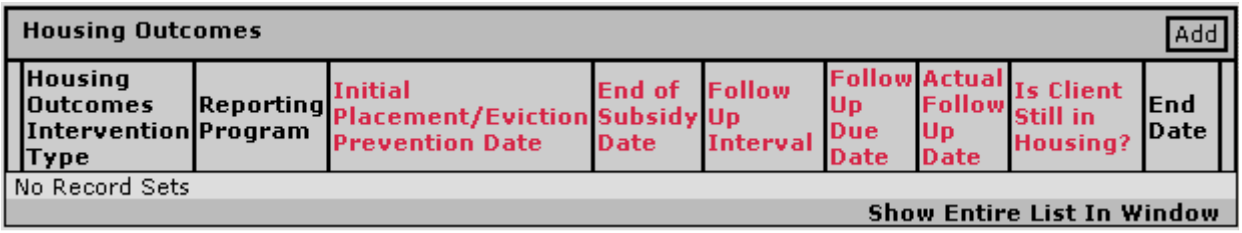
8. **Add Exit using the correct provider from your dropdown list** & set follow-up due dates, if required, when the client exits this program.

- Click on Entry/Exit icon

- *Select the pencil icon under the Exit column that corresponds with the correct entry!*
- Click next to children to include in this exit.
- Add exit date (generally the last day in your program, or 90 days following the last contact with this client).
    - Note: the STRA program services have specific guidelines. See your STRA manual.
- Complete the exit questions:
    - Reason Leaving: "completed program" and "left for housing opportunity before completing program are positive outcomes." Select from other reasons when appropriate.
    - Destination: Do not use destinations that include unfamiliar acronyms or codes (such as VASH and HOPWA), as those generally refer to outcomes for specific program types. Also, do not use "don't know" unless no other option is suitable!
    - Continue down the assessment, reviewing and updating information for each question. If you need to update Income or Non-Cash Benefits subassessments, remember to end the "old" amount (do not delete!) and add the "new" amounts.



9. **Follow-ups**: The follow-up due dates should be set on the exit assessment when you are exiting your client. However you should make all updates to the follow-ups due in the "Assessments" page. Click on Add and fill in follow-up information according to the chart below.



Follow-up Guidelines		
Program Type	**Follow-up Type**	**Intervals**
Emergency Shelter	Housing Outcomes	3 and 6 months
Transitional Housing	Housing Outcomes	3, 6 and 12 months
STRA (Short-term rent assistance)	Housing Outcomes	Not required for short-term vouchers (less than 28 days). 3, 6 and 12 months for other STRA assistance.
Family Strengths	Housing Outcomes	3, 6 and 12 months
HUD Horizons	Housing Outcomes	3, 6 and 12 months
Short-term culturally specific (less than X days)		Not required
Long-term culturally specific		3, 6 and 12 months

Troubleshooting Security Issues: what to do if your client information is not visible:
If you have an existing client record with information blocked or with limited access for you or other ServicePoint users within your agency, you may have problems with either the Release of Information or security settings. DO NOT USE either the Security Settings or Release of Information/ROI buttons. Call Annie (503-988-4113) or Michelle (503-988-3691 ext. 22105) for help with this. This is probably only an issue with old clients (created before July 2008).

Troubleshooting family members that show up in reports as singles:

1. If child record does not have demographics entered, then the household members will show as singles. To correct this, go to the child record and add demographic data on the "Client profile" and "Entry/exit". Be sure this information is either updated in the entry/exit screen or backdated to the entry date, otherwise it will not fix the report problem.
2. Check to make sure child box is checked on Entry/exit.
3. If no one in the household is under 18, then all will show as singles.
4. Check security settings. If client was entered under a different level and no ROI was done, then the child demographics may not be visible or were not entered. The security and demographics must be correct at the level the client was entered at.