



ClientPoint Data Entry Workflow

ServicePoint v5.x



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ClientPoint

“The filing cabinet!”

ClientPoint > Client Search ! ★ ?

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Client Search

i Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	-Select-			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	-Select-			
Exact Match	<input type="checkbox"/>			

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

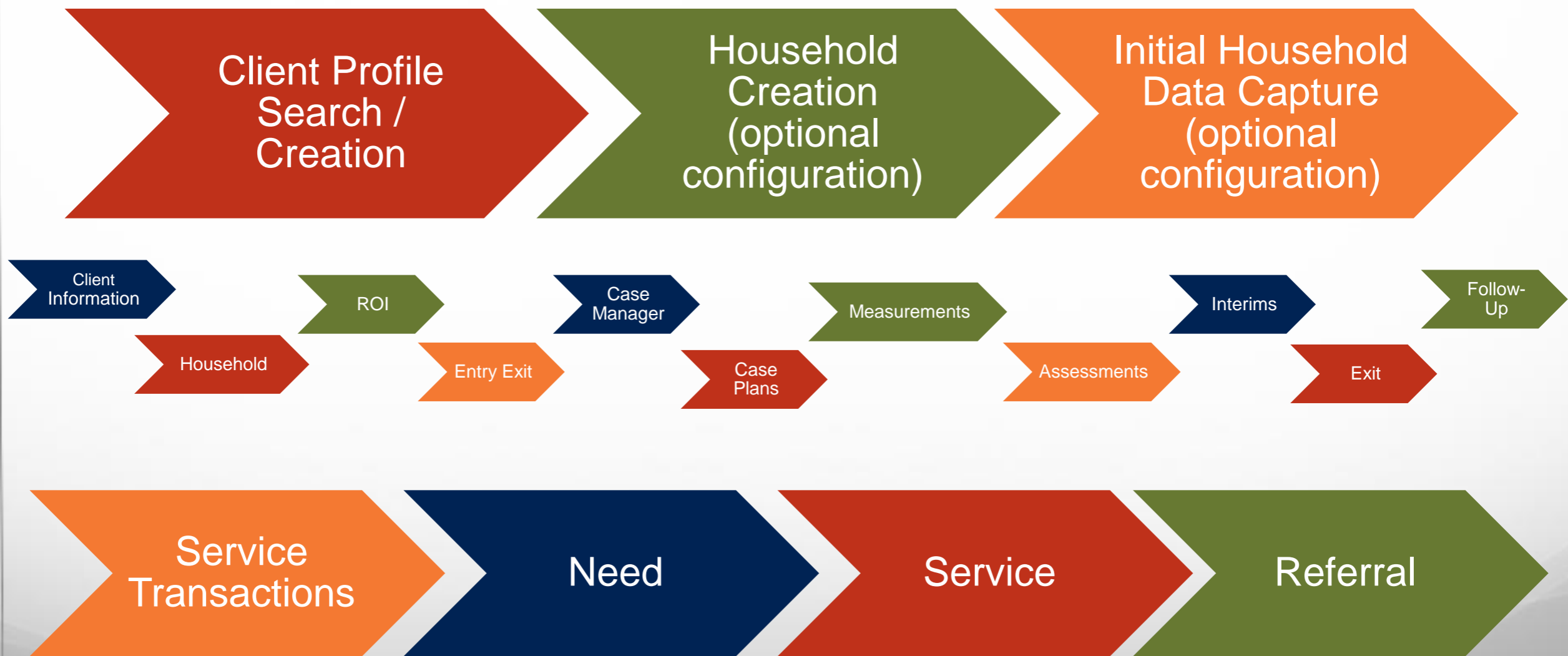
Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit



Data Entry Made Easy!

Follow the prompt/pop-up window, then follow the tabs through the record (from left to right).





Client Profile Search / Creation

ClientPoint > Client Search

Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Name Data Quality	-Select-				
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	-Select-				
Exact Match	<input type="checkbox"/>				

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

➤ Search for your Client Record via the Name(s), Alias, SSN, or Client ID Number field(s).

Note: The system will not allow adding a new client until you click "Search" first.





Client Profile Search / Creation

Matching Client Records will be listed under the “Client Results” section (at the bottom of the page).

➤ If a matching record exists, click the pencil/edit icon to the left of the Client’s Name (and skip the next slide).

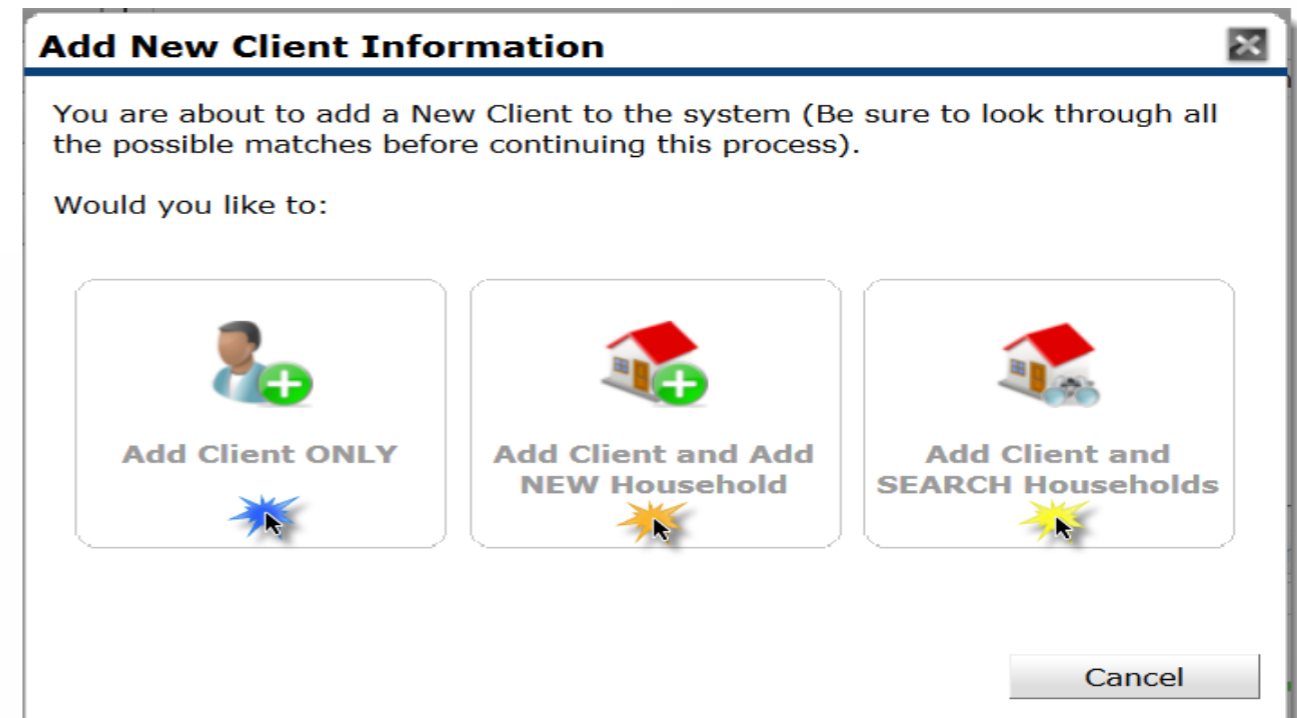
➤ If no match exists, create a new file folder for the client by clicking on the “Add New Client With This Information” button to create a new Client Profile.

 The screenshot shows a web interface for client management. At the top, there are four buttons: "Search", "Clear", "Add New Client With This Information" (highlighted with a blue starburst), and "Add Anonymous Client". Below these is a section titled "Client Number" with the instruction "Enter or scan a Client ID number to go directly to that Client's profile." and a form with a "Client ID #" input field and a "Submit" button. The "Client Results" section below features a table with columns: "ID", "Name", "Social Security Number", "Date of Birth", "Alias", "Gender", "Banned", and "Household Count". The table is currently empty, and the text "No matches." is circled in red at the bottom of the table area.


Client Profile Search / Creation

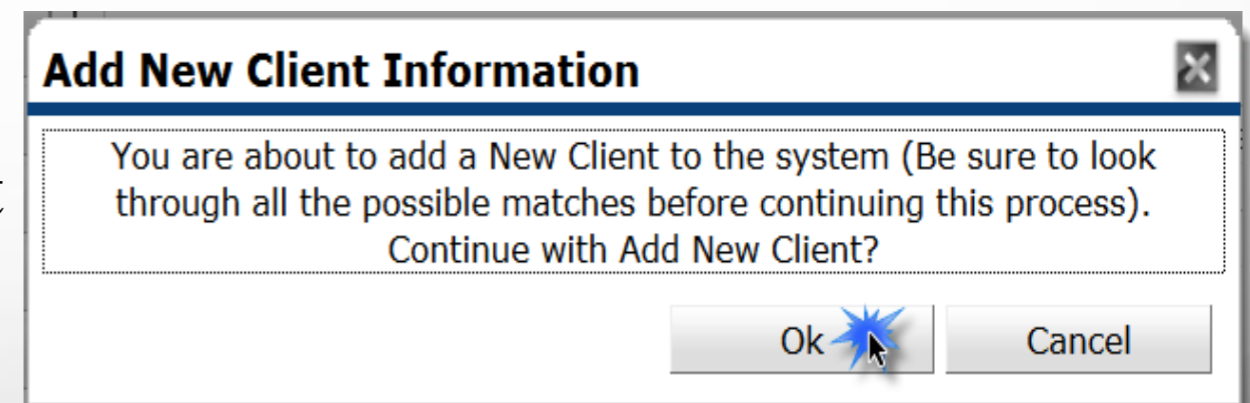
You may see this pop-up display:

- Click on the appropriate button depending on if you are entering a single or household.
- Skip to Slide 11, the Household Section, if selecting the middle “Add NEW Household” button



If Add Household Option is not set-up:

- Click Okay in the “Add New Client Information” pop-up.



*Note: The Household Option can be set in
the Provider Admin->Module Settings
->ServicePoint Settings*





Client Profile Search / Creation

Back Date allows the user to enter client and assessment information for a date prior to the current date.

➤ If the back date prompt is turned on in your system, the “Back Date Mode” pop-up will display before you can enter into the client record.

- If back-dating, change the date and then click Set New Back Date. If not back-dating, just click the Use Current System Date button.

Note: To turn the pop-up on or off, go into provider admin->Module Settings-> ClientPoint





Client Information

“Client Information Tab”

Depending on the implementation settings, once in a client record there are various options on which tab is the default so if the Client Profile is not active, click on it to start there.

Client - (7) Taylor, Amee 🔒

(7) Taylor, Amee
 Release of Information: None -Switch to Another Household Member- ▾ Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Client Record
Issue ID Card

Name	Taylor, Amee
Name Data Quality	Full Name Reported
Alias	
Social Security	222-22-2222
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	
Age	

Change
Clear

Client Demographics 🔒





Client Information

➤ Click the pencils (edit button) to add, edit or update.

Note: These data elements create the client's unique ID. Altering this data could alter the Unique Identifier for reporting in the database.

➤ Custom Assessment fields may need to be completed.

Summary	Client Profile	Households
 Client Record		
Name	Taylor, Amee	
Name Data Quality	Full Name Reported	
Alias		
Social Security	222-22-2222	
SSN Data Quality	Full SSN Reported (HUD)	
U.S. Military Veteran?		
Age	35	
 Client Demographics		
Date of Birth	08/01/1979	
Date of Birth Type	Full DOB Reported (HUD)	
Gender	Female	
If Other Gender, specify		
Primary Race	Asian (HUD)	
Secondary Race		
Ethnicity	Non-Hispanic/Non-Latino (HUD)	
<div style="border: 1px solid red; padding: 2px; display: inline-block;">Additional Profile Information</div>		

