Collaborate. Coordinate. Evaluate.

ClientPoint Data Entry Workflow

ServicePoint v5.x

SERVICEpoint™

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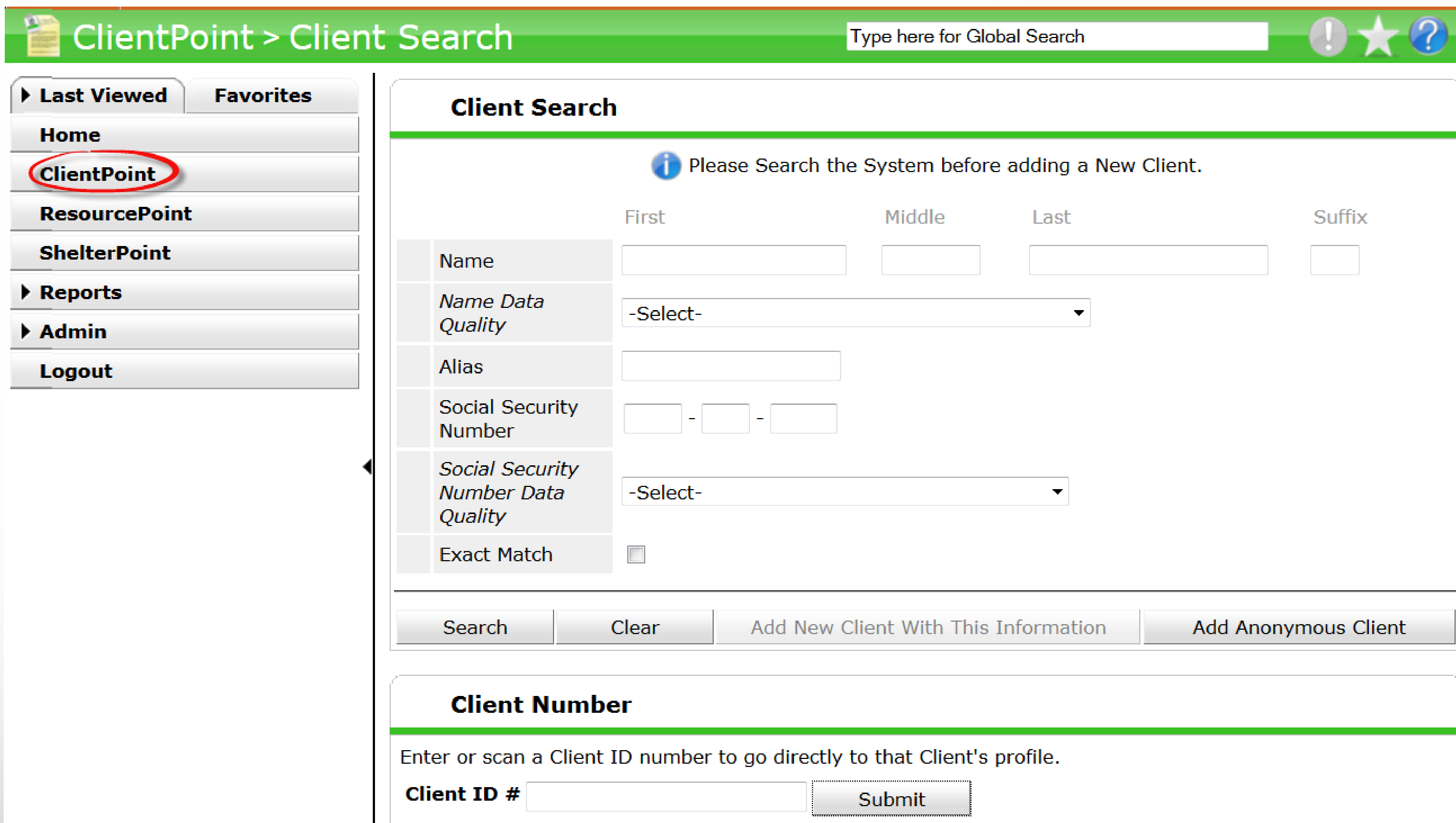
ServicePoint Training Site

ClientPoint

"The filing cabinet!"



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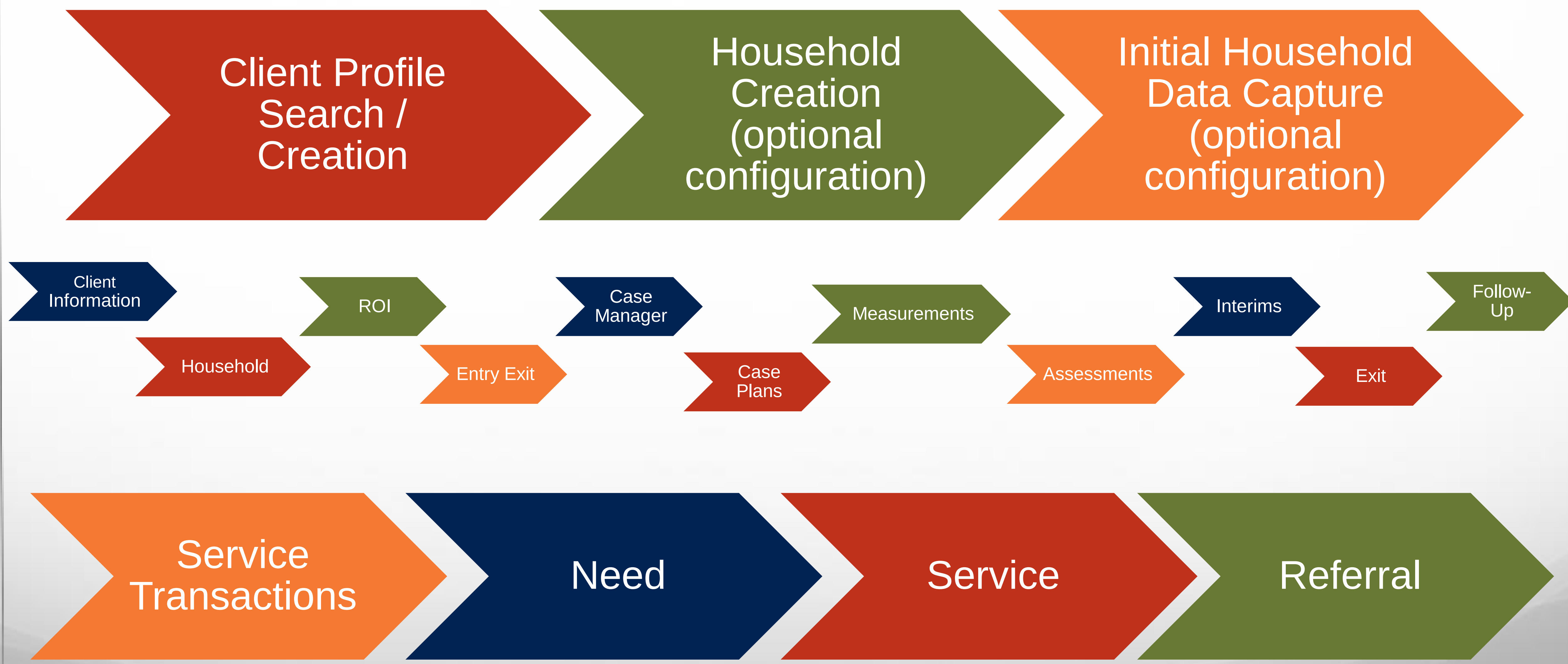
Data Entry Made Easy!

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



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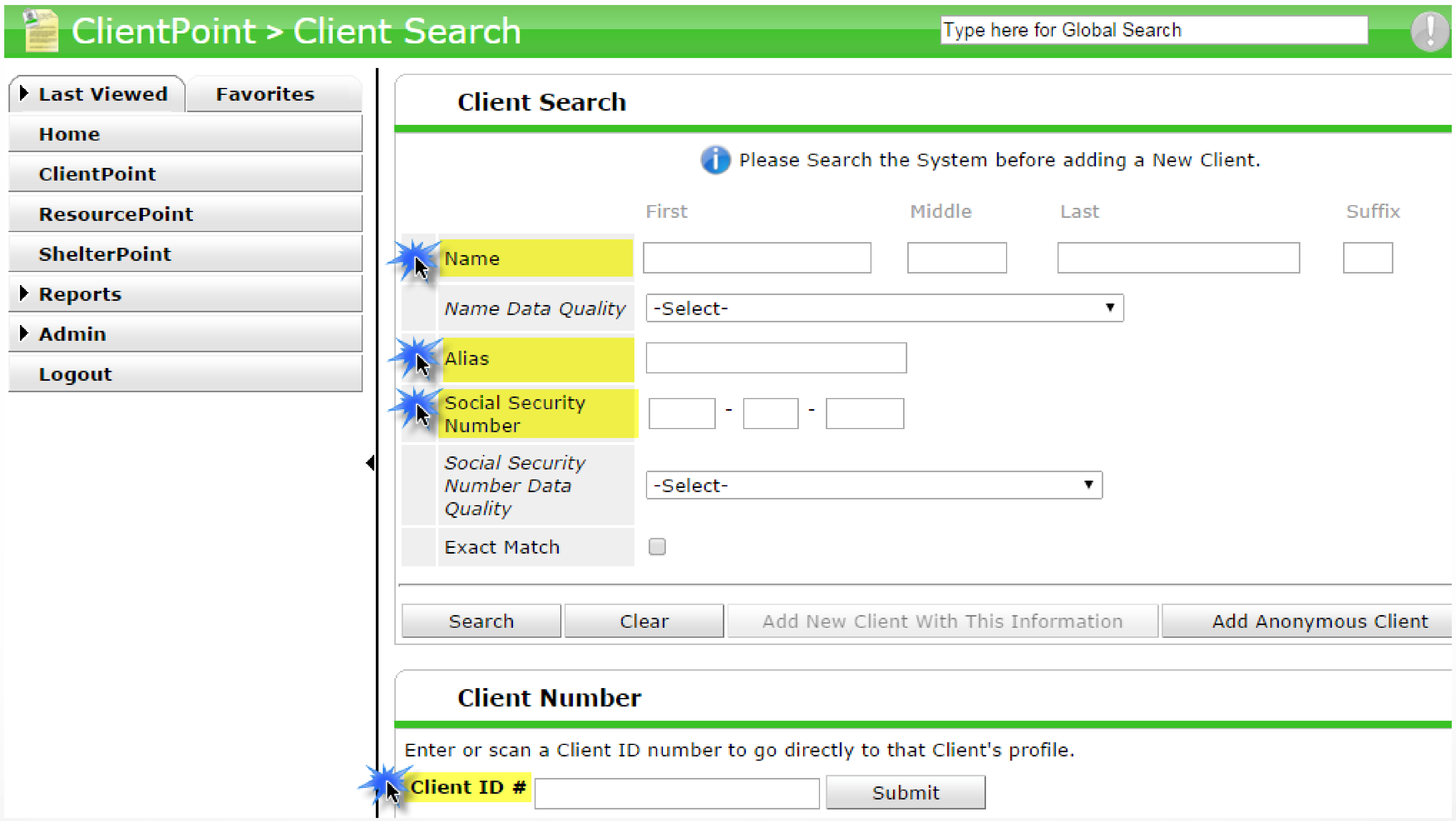
Client Profile Search / Creation



- 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.

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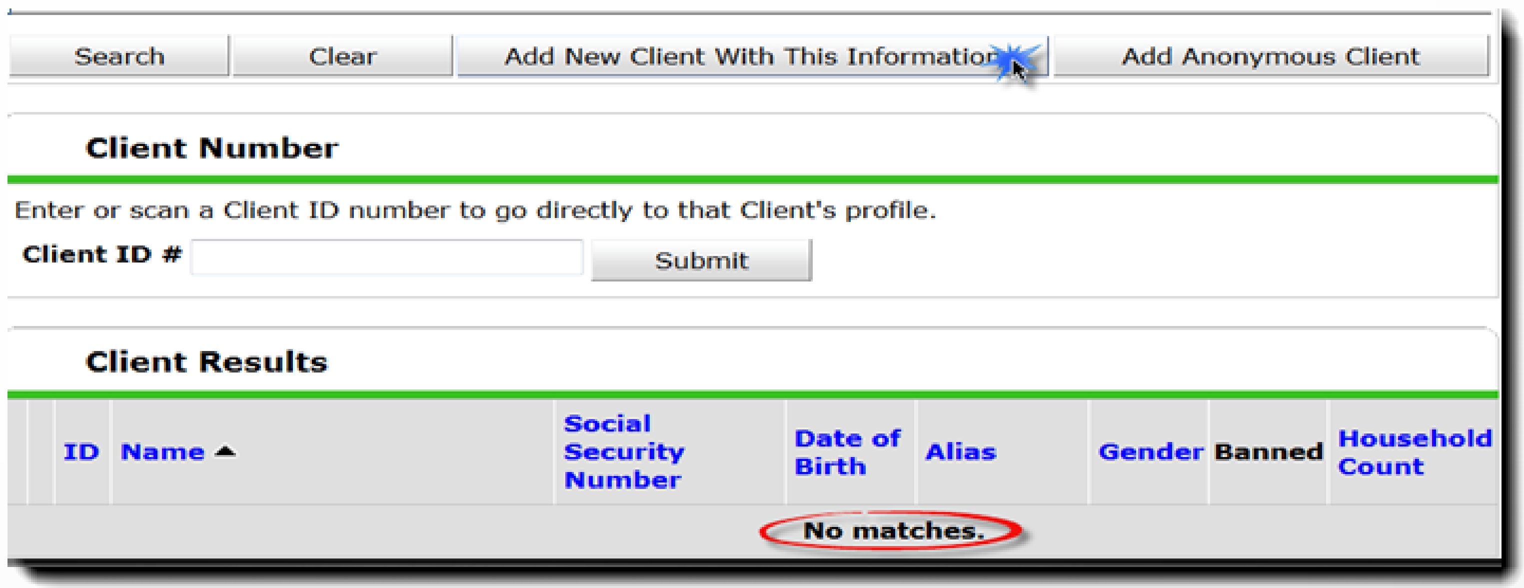
Client Profile Search / Creation

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.

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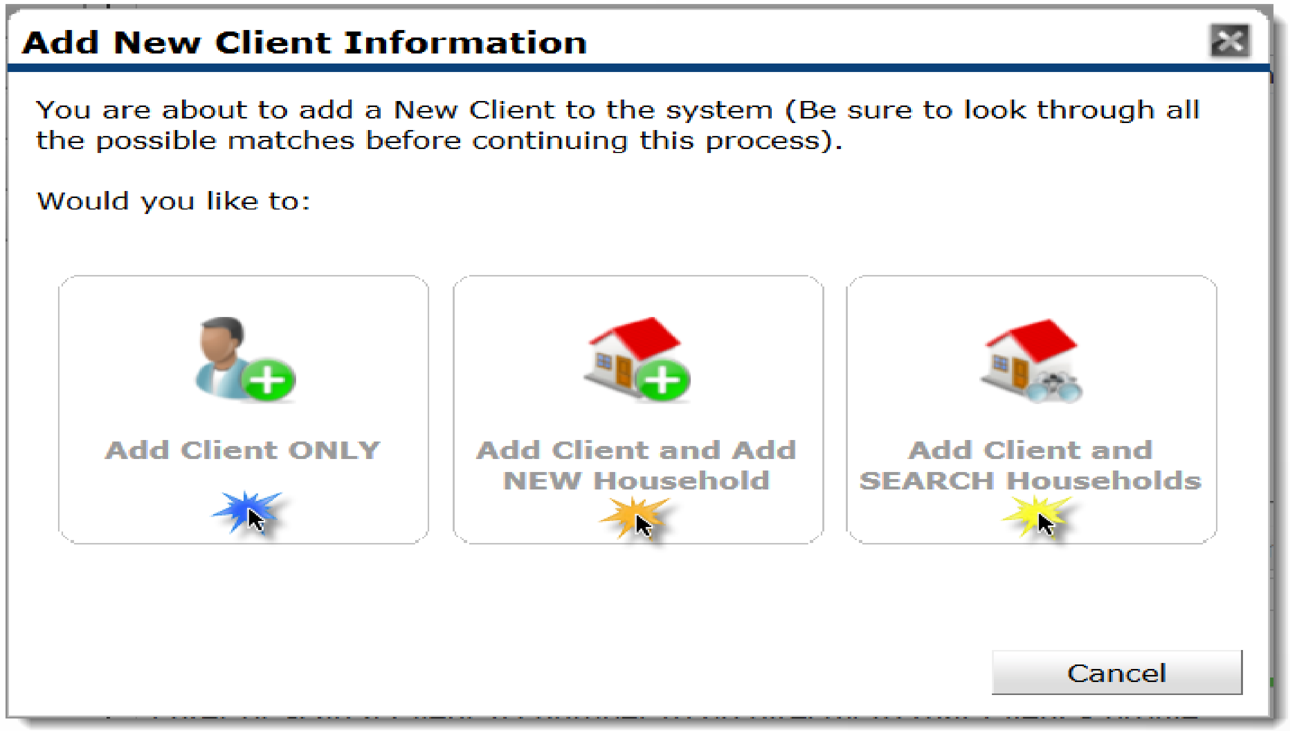
Client Profile Search / Creation

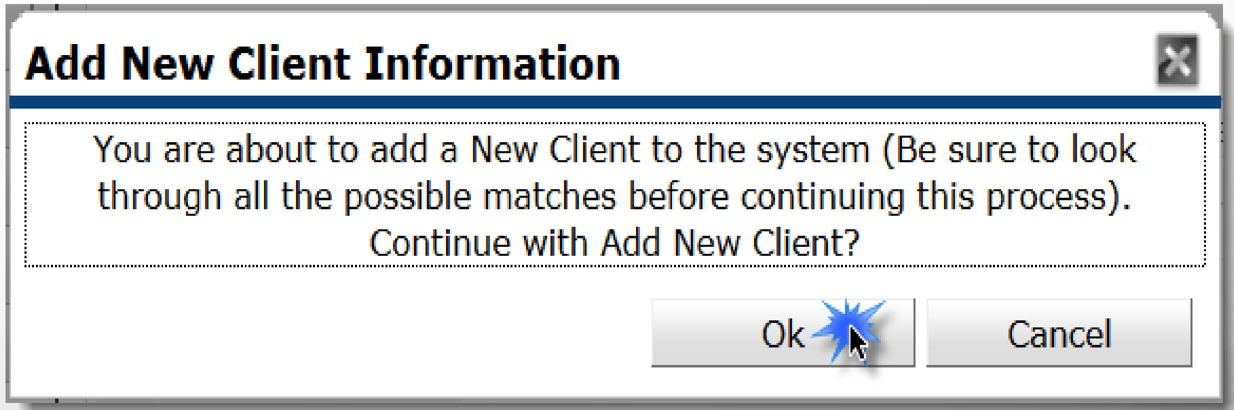
You may see this pop-up display:

- 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

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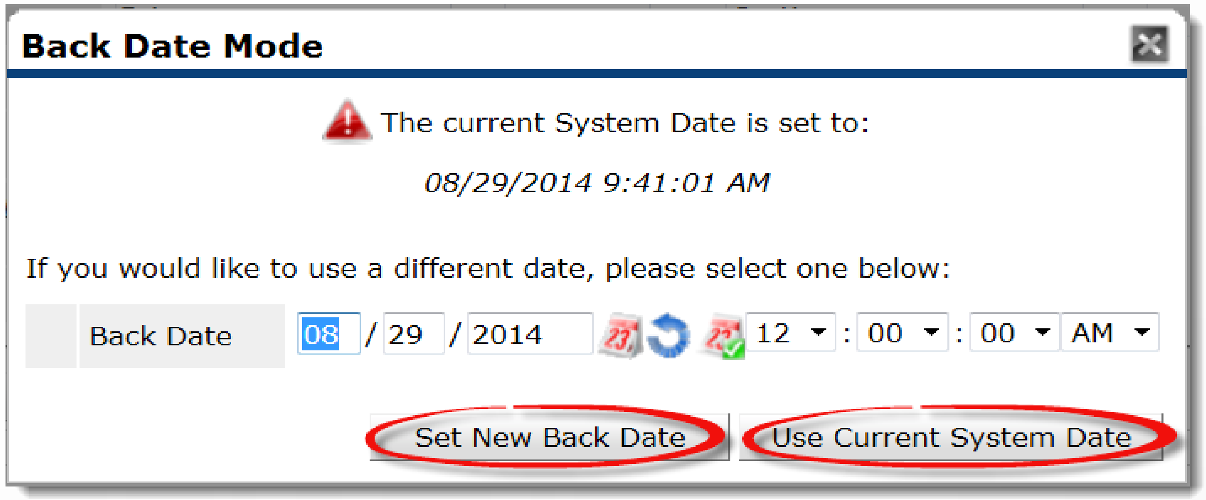
Client Profile Search / Creation

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.

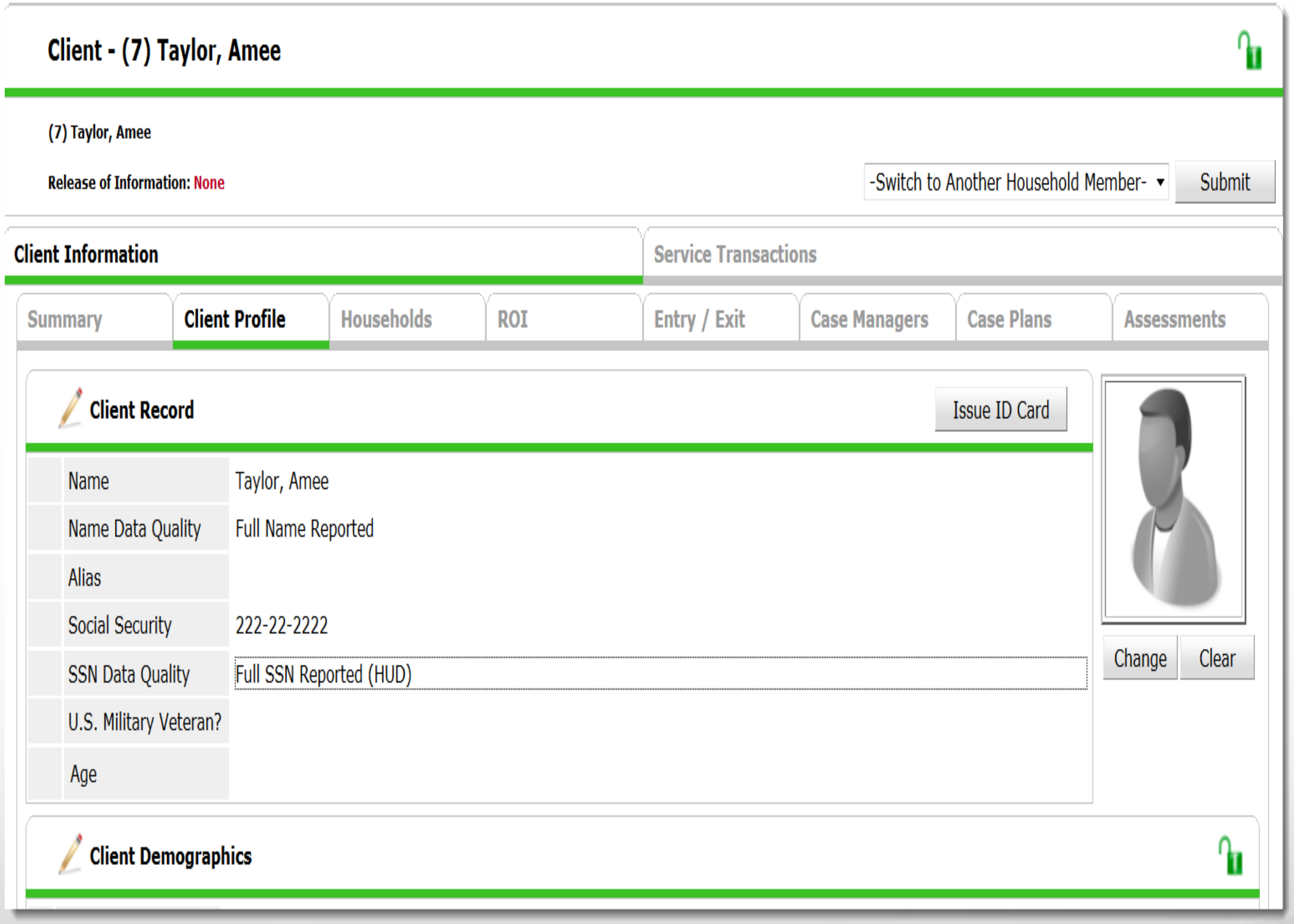


Note: To turn the pop-up on or off, go into provider admin->Module Settings-> ClientPoint

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.



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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.