



SERVICEPOINT WORKFLOW

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SERVICEPOINT WORKFLOW

Bowman Systems recommends the following workflow for complete data entry into our database. Completing data entry with this workflow maximizes reporting capability for both canned and custom reports in the data base. The workflow is divided into 3 sections: client arrival/intake, providing services and updating assessment information during a client's stay in your program, and exit /outcome information.

CLIENT ARRIVAL

Many programs refer to this step as the client's point of entry or intake. This can also be referenced as capturing the client's story at the time they entered your program. This information is generally static and fixed. Please note: information may already exist for this client in a shared database. We recommended that information be reviewed and updated each time a client arrives or completes an intake in your program.

- Click ClientPoint – Search the data base for possible matches. Click on the existing record or add the client as new with the completed information.
- The Profile of the new record will load and the client id will be generated (#).
 - For clients accompanied by family – complete household information
- Click on ROI and Add Release of Information
- Click on Entry/ Exit Worksheet and Add a New Entry 
 - Enter the date of the client's entry into your program (intake, point of arrival). Complete the entire worksheet (check of family members when applicable). Noting that the "TYPE" of Entry/ Exit you select here will determine the type of reports you are able to generate!
 - The most recent assessment information will auto populate this worksheet. Be sure to check the data for accuracy as of the client's entry into your program. Save.
 - For each household member, click the pencil and complete the worksheet! Save. Save and Close when all household members have had all of their data completed.

SERVICES AND ASSESSMENTS

Service Transactions and additional information can be added or captured at anytime during a client's stay. When a client is assigned a bed, their information can be managed in ShelterPoint. When a client begins receiving additional services such as case management or financial assistance, Service Transactions should be created. Additionally, when a client receives new income sources or has provided you with updated circumstances you may add the new information to their Assessment.

- Click ShelterPoint – click on an empty bed and select the client's name from last profile, type in the client # or search for the correct record. Fill in the bed stay data for the client. (Assign beds to family members where applicable). Save.

AND/ OR


- Click Service Transactions, then click enter multiple services – (check of family members when applicable) Select your program from the provider list and then select the service you will be providing from the quick list. Enter a quantity and a status. In general, your service start dates will be on or after the entry date above. If the service will be ongoing, be sure to leave the end date blank and the status “in progress”. If the service ends on the same date it begins, enter the end date and set the status to “closed”. Save.
- Click on Assessments – be sure to set the date. In general you will use the date that your agency learned the information about the client. Note: If the information was true at entry, use the entry date! Back date when necessary. Answer any questions that apply. Save. (Enter data for all family members when applicable)

CLIENT EXIT

In order to evaluate a program, you need to show any changes that may have occurred with your client’s during their stay in your program. Use the exit dates to determine length of stay and changes over time. You may then use the information to accurately count the number of people active in a program at a point in time. If no exit date is provided, this is not possible.

- Click on ShelterPoint – Update the Confirmation list, leaving the client’s box unchecked. They will then appear on the Transmit Today’s Check out List. Enter the date they left the shelter and click Check Out. Be sure to include family members where applicable.

AND/OR

- Click on Service Transactions – click on the pencil of the service you would like to end. Enter the end date and change the status to “closed”. You may also edit the outcome of the need related to the service at this time.
- Click on Entry/ Exit Worksheet and click on the Exit pencil for the current stay.  Fill in the client’s exit destination and reason for leaving. Update the exit data on the worksheet. Remember, the most recent assessment values will auto populate, so if you have been updating the client’s assessment during their stay, this information will be more accurate. Make sure to end date any sub assessment information that is no longer true and create new sub assessments to track information that is true as of the client’s exit in your program.

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