Data Entry steps – Family

Enter Data As – Only if you have more than 1 program

**1. Backdate mode**

Search for client in ClientPoint

YES – The client is already in the database

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| 1. Click on Client (name or pencil) - Are you in Backdate mode? |
| 2. Click Household Tab |
| 3. Click Manage Household button –Only if you need to add or remove someone |
| Remember that a client should really only have 1 Household, use the Manage button to make changes |
| 4. Click ROI Tab– Include ALL Household members – remember that you can now use the **Search** button and apply this ROI to all programs that you may have |
| 5. Click Entry/Exit Tab– Include ALL Household members Type is HUD – (unless you are a different program like VA or Path) |
| 6. Click Add Household Data button – this will allow you to apply the same answer to all Household members for specific questions that would be the same for each person |
| 7. Click all Household members to include in this step – check boxes |
| 8. Answer all the questions |
| 9. Click Save and Exit |
| 10. Verify all the questions on the assessment – make sure there are no Red exclamation points for the 4 sub assessments – Make sure to get Green Check mark for each HH member |
| If you need to make any changes to the data refer to the directions for to do an Update on page 2 |
| 11. Click Save after each HH member |
| 12. Answer all questions for each HH member – Click Save after each HH |
| 13. Click Save and Exit |
| 1. Exit Backdate Mode –are now done with this past date? |
| 1. 14. Case Plans (Optional) – see direction below |
| 1. This is where you can create Goals and Case Notes |
| 1. 15. Click Service Transaction Tab, click the Add Multiple Service button |
| Remember to add Funds for any service that you wrote a check for |
| Services need to be Closed and Fully Met |
| 16. Click Entry/Exit Tab - Exit Client – Include ALL Household members |
| 17. Click the Pencil for Exit Date |
| Do you have the correct Exit date |
| 18. Answer all Questions for EVERY Household member that have changed - Must get a Green check for every household member – Follow the Update Sub-Assessment directions on page 3 |
| 19. Click Save and Exit |
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Data Entry steps – Family

Enter Data As – Only if you have more than 1 program

**1. Backdate mode**

Search for client in ClientPoint

NO – The client is not in the database

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| 1. Complete All questions on the Search screen |
| 2. Click Add client - Are you in Backdate mode? |
| 3. Click Add Client and Household |
| 4. Search for additional Household members |
| 5. Add each Additional member (scroll back to the top, do these 2 steps until all names appear at bottom) |
| 6. Click Continue, only after you have all clients names at the bottom |
| 7. Answer Household member information questions Head of Household and Relationship |
| 8. Click Save and Exit |
| 9. Click ROI Tab – Include ALL Household members - remember that you can now use the **Search** button and apply this ROI to all programs that you may have |
| 10. Click Entry/Exit Tab– Include ALL Household members Type is HUD – (unless you are a different program like VA or Path) |
| 11. Click Add Household Data button – this will allow you to apply the same answer to all Household members for specific questions that would be the same for each person |
| 12. Click all Household members to include in this step – check boxes |
| 13. Answer all the questions |
| 14. Click Save and Exit |
| 15. Answer all the questions on the assessment – make sure to address ALL Red exclamation points for the 4 sub assessments - Make sure to get Green Check mark for each HH member |
| 16. Click Save After each Household member |
| 17. Answer all questions for each HH member – Click Save after each HH |
| 18. Click Save and Exit |
| Exit Backdate Mode |
| 19. Case Plans (Optional) – see direction below |
| This is where you can create Goals and Case Notes |
| 20. Click Service Transaction Tab, click Add Multiple Services button |
| Remember to add Funds for any service that you wrote a check for |
| Services need to be Closed and Fully Met |
| 21. Click Entry/Exit Tab - Exit Client Include ALL Household members |
| 22. Click the Pencil for Exit Date– Include ALL Household members |
| Do you have the correct Exit date |
| 23. Answer all Questions that have changed for EVERY Household member - Must get a Green check for every household member – Follow the Update Sub-Assessment directions on page 3 |
| 24. Click Save and Exit |
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Steps for completing and Update/Annual or For Fixing Data

Enter Data As – Only if you have more than 1 program

Completing an Update or Annual Fixing data entry errors

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| 1. Search for Client or Enter client ID | **Fixing data is only for Entry data that was not correctly done at time of Entry** |
| 2. Click on client Name or Pencil | 1. Search for client or enter client ID |
| 3. Click on Entry/Exit Tab | 2. Click on client Name or Pencil |
| 4. Click on Interim icon button on right side | 3. Click on Entry/Exit Tab |
| 5. Click Add Interim button | 4. Click On the Pencil for Entry date |
| 6. Select Update or Annual – CHECK the date | 5. Click Save and Continue |
| 7. Click Save and Continue | 6. Re-answer any question that has the wrong answer |
| 8. Answer all appropriate questions | **To Fix data for the 4 sub-assessments:** |
| Answer all appropriate questions for each Household member – making sure to get Green checks if necessary | 7. Click the Pencil for the item that is not correct |
| 9. IF you have to answer for each household member then click SAVE and do the same for all members | 8. Fix the Amount - if necessary |
| For the 4 sub-assessments: Income, Non-cash benefits, Health Insurance and Disabilities you must pencil and **End date** any item that in no longer active, this is the past answer if it is not correct. Remember the Next and Previous button to scroll through all the sources for each one | 9. Change the “Receiving Income Source?” From either Yes or No, whichever is the correct answer. Click Save. |
| Then you click the Red exclamation point and make the necessary corrections, if you are making the item back to Yes because of an increase then you will fill out the Pop up with the correct information | 7. Click Save – after you have fixed all necessary questions |
| Remember the End date is one day prior to the Update date | 8. Remember do you need to this for each Household member go back to the top click their name |
| 10. Click Save and Exit | 9. Click Save and Exit |
| 11. Click Exit |  |
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Steps for completing other data entry items that are optional

Enter Data As – Only if you have more than 1 program

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| **VI-SPDAT** | **Creating Case Plans and Goals, case notes** |
| 1. Click on the pencil for Entry date | 1. Click on Case Plans Tab |
| IF you are in the middle of completing an Entry scroll to the top | 2. Click Add Goal |
| You will see a list of available assessments | Do you have the Right data? |
| Select the VI-SPDAT or F-SPDAT | 3. Choose Classification |
| 2. Click Add button | 4. Choose Type |
| 3. Complete all the questions | 5. Choose Target Date |
| 4. Click Calculate | 6. Choose the Overall Status |
| 5. Click Save | 7. Click Add Goal |
| 6. Click Save and Exit | 8. Scroll down Click Add Case Note |
|  | Do you have the correct date |
|  | 9. Type Case Note |
| **Case Manager Tab** | 10. Click Save Case Note |
| 1. Click on Case Manager Tab | 11. Click Save and Exit |
| 2. Click Add Case Manager Button |  |
| 3. Click Me at the top |  |
| 4. Click Add Case Manager |  |
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|  | **To Add Case Notes later** |
|  | 1. Click on Case Plans Tab |
|  | 2. Click on the little blue Note pad |
|  | 3. Click Add Case Note |
|  | Do you have the correct Date |
|  | Type Case Note |
|  | 5. Click Save Case Note |
|  | 6. Close the small window |