Data Entry steps – Single

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

**1. Backdate mode**

Search for client in ClientPoint

YES – found in the database NO – not in the database

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| 1. Click on Client (name or pencil) - Are you in Backdate mode?
 | 1. Complete All questions on the client Search screen |
| 2. Click ROI Tab - remember if you have more than 1 program you can add them all right on this step, use the Search button | 2. Click Add client - Are you in Backdate mode? |
| 3. Click Entry/Exit Tab – Type is HUD (unless you are VA or Path program) | 3. Click Add Client Only |
| 4. Verify all the questions on the assessment – make sure not to leave any Red exclamation points for the 4 sub assessments | 4. Click ROI Tab – remember if you have more than 1 program you can add them all right on this step, use the Search button |
| If you need to make any changes to the data refer to the directions for how to do an Update on page 2 | 5. Click Entry/Exit Tab –Type is HUD (unless you are VA or Path program) |
| Do you need to Update any of the 4 sub-assessments with current data? Remember to End Date any old data | 6. Answer all the questions on the assessment – make sure to address ALL Red exclamation points for the 4 sub assessments |
| 5. Click Save and Exit | 7. Click Save and Exit |
|  Exit Backdate Mode –are done with this past date? |  Exit Backdate Mode –are done with this past date? |
| 6. Case Plans (Optional) – see directions below | 8. Case Plans (Optional) – see directions below |
| This is where you can create Goals and Case Notes | This is where you can create Goals and Case Notes |
| 7. Click Service Transaction Tab, Click Add Multiple Service button | 9. Click Service Transaction Tab, Click Add Multiple Service button |
| – Remember to add Funds for any service that you wrote a check for | – Remember to add Funds for any service that you wrote a check for |
| - Services need to be Closed and Fully Met | - Services need to be Closed and Fully Met |
| 8. Click Exit Client Tab, click the pencil for Exit date | 10. Click Entry/Exit Tab, click the pencil for Exit date |
| Do you have the correct Exit date? | Do you have the correct Exit date? |
| 9. Answer all Questions – that have changed follow the Update direction on page 2 | 11. Answer all Questions – that have changed follow the Update directions on page 2 |
| 10. Click Save and Exit | 12. 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 and Update or Annual Fixing data entry errors

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| 1. Search for client or Enter client ID | **These steps Do not work for the sub-assessment**  |
| 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 on the 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 – that need to be Updated | See below for 4 sub-assessments |
| **To Update data for the 4 sub-assessments:** | 7. Click Save and Exit |
| 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 | **To Fix data for the 4 sub-assessments:** |
| Remember the End date is one day prior to the Update date | 1. If you mistakenly put in the wrong answer for one of the sub-assessments, Click the pencil for the one that is wrong.  |
| 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 | 2. Change or add the amount if necessary. |
| 10. Click Save and Exit | 3. MUST CHANGE “Receiving Income Source?” Question if it No then make Yes, if it was Yes then make NO |
| 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 |  |
|  |  |
|  | **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 |
|  | 4. Click Save Case Note |
|  | 5. Close the small window |