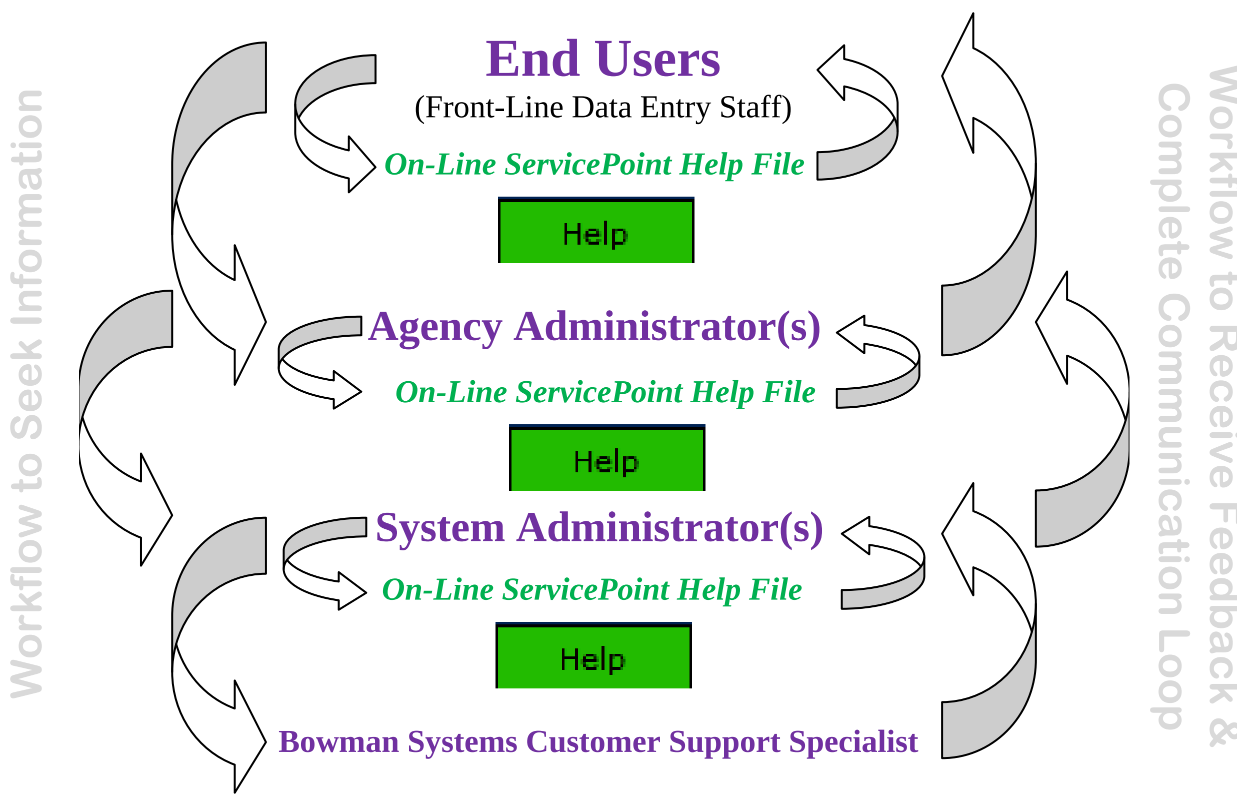
ServicePoint Learning Objectives for Agency Administrators

I. ServicePoint Overview

A. **Purpose of ServicePoint** – Web-based case management application to manage client, service, and resource data in a real-time environment, and to create comprehensive reporting.

B. **Help and Support** – A ServicePoint Help file is located within the online application.



C. **General ServicePoint Information**

1. System times out after 30 minutes of inactivity – 30 minutes of not clicking on a button or link within the application. If you get interrupted, click Save before you leave your computer. To save your work and protect confidential information, log out of ServicePoint any time you leave the computer.
2. Use buttons and links in the ServicePoint application to the maximum extent possible when navigating through the system. If you use the browser's back button you may encounter difficulties getting to the previous page and refreshing entered ServicePoint information.

Note: ***Tabs and Navigation Bar*** *– You can navigate in ServicePoint by clicking on a Tab (listed from left to right across the top of the ServicePoint screen) or by clicking on an Underlined Hyperlink (listed down the left side of the ServicePoint screen). Both options link into modules. Once logged in to ServicePoint, you do not need to use the internet browser's* ***Back*** *and* ***Forward*** *buttons!*

To return to the main page of a module, click on the gray tab on the navigation bar along the top of the screen. You have the ability to navigate some of the green tabs through the use of drop down menus. The ClientPoint, ShelterPoint, Reports, and Admin tabs have triangles in the lower right hand corner. When you hover your cursor over these triangles, drop down menus appear. You can quickly navigate these menus by selecting the area you wish to access. The ClientPoint and ShelterPoint drop down menus appear only after those modules have been accessed. Once you open a client record in ClientPoint, a similar dropdown menu will be available for the current client along with the profiles for the 4 most recent records. In ShelterPoint, a dropdown menu will be available that allows you to navigate through any of the last five bedlists you have accessed in your login instance.

D. **Password Hints:**

Passwords are case sensitive

All passwords must contain between 8-16 characters, with at least 2 numbers

Secure temporary passwords must be reset after initial login by the User.

Security features in ServicePoint auto-prompt password resets after 45 days

Whoops! – A 3rd failed login attempt inactivates a User, requiring reactivation by your Agency Administrator or System Administrator

Only ONE User should use any given Username and Password – DO NOT SHARE LOGINS

Responsibility for ALL of your actions is directly linked to your User ID

Don't Share Your Password

E. **Logoff –** *You should log off of ServicePoint every time you walk away from your computer.* Follow guiding federal regulations to keep information secure, and respect confidential information as if it included your own personal information.

II. ServicePoint – Home

A. **Site Banners** – Training site banners across the top and bottom of the page appear bright orange on customer training sites while the banners on customer live sites are blue. Do not enter live/real/confidential client data on the training site.

B. **Site/Provider/Location/Date** – Once logged in, you will see your Implementation's Name (Management Information System, City of People, etc.), the name of the Provider / Location in which your user name was created, and **today's date**.

Note: *ServicePoint is a live/real-time database. Information entered in will timestamp with today's date unless you manually change the date. Dates are located throughout ServicePoint and should be accurate for the time of assessment, entry, service, etc.*

C. **Click here to "*enter data as* another provider"** – This allows Agency Administrators and other End Users to enter data as another provider in the same agency tree. This function is utilized most frequently when an end user enters data for providers with different security settings or can be utilized to easily ensure that all information is entered on behalf of the correct provider.

Note: *Agency Administrators automatically have permission to enter data for their own provider and providers on the sub-branches of their provider tree. End Users must be specifically assigned the "enter data as" permission(s) on their user profile to be able to enter data for other providers.*

D. **Follow-up List** – The follow-up list is a personal task management list (unique to each user) displaying target dates for recorded goals, action steps, or services that you have created or that have been referred to you. The list will display up to 10 follow-up dates in each of three categories (goals, action steps, services), for a maximum of 30 items at any one time. A completed item drops off the list and is replaced by another follow-up item in that category when an "Actual Follow-Up Date" is entered into the corresponding follow-up record.

E. **Newsflash – System and Agency** – The System and Agency Newsflash areas are places for System and Agency Administrators to post news items of general interest.

Note: *System Administrators can enter information (in **System Newsflash**) that everyone in all branches of the provider tree can see. Items that an Agency Administrator posts (in **Agency Newsflash**) will only be viewable by the providers and child providers in their provider's tree structure (specifically those tree sub-branches originating from the Agency).*

F. **Version, Company and Copyright information** – At the bottom of the ServicePoint home page you see the ServicePoint version and build numbers, copyright information for Bowman Systems, and copyright information on the lookup taxonomies included in ServicePoint.

III. ResourcePoint

ResourcePoint is a searchable information directory to view Provider Info Pages in your ServicePoint implementation. Once you create and configure an Admin Provider Page in the ADMIN module, sections of the information is viewable in ResourcePoint. ResourcePoint is commonly referred to as “The White and Yellow Pages”.

> **Note:** Use the “less is more” rule when searching in ServicePoint to return the most possible matches, and then continue to narrow your search by using the following options:

A. **Alphabetical Search** – Click on “All” link to see an alphabetic list of all providers. Or, click on a letter to see the Provider Name beginning with A, B, C, etc.

B. **Search Terms** – Use the search terms area to search the database for information on a specific provider. The search will look for possible matches in the name of the providers and also within the provider description.

C. **City, County, State, ZIP, Area** – These options allow you to search by filling in one or more location fields. Each location option searches not only the provider’s physical location but also the locations that the provider serves.

D. **Type (Level), Service Code, and ServicePoint Users Only -** Search your provider hierarchy by viewing one provider level at a time, or limit your search to only providers that have been marked as ServicePoint providers. A ServicePoint provider is indicated with an icon to the left of the Provider’s name.

E. **Service Codes** – The service codes allow you to search for all providers that provide a specific service. Type in a word or phrase, or use the lookup feature to find information in one of the taxonomies. The AIRS Taxonomy is the most common taxonomy used by HMIS, 211, and Information and Referral agencies. There are other taxonomies that can be searched if your implementation has purchased them. The additional taxonomies are ICD-9, CPT and DSM-IV-TR.

   1. **AIRS Taxonomy** – The AIRS (Alliance of Information and Referral Systems) Taxonomy is a classification system for indexing community resource databases. It is a collection of thousands of terms that allow providers to use the same term for the same service. Using the AIRS taxonomy reduces errors in reporting on services. The AIRS Taxonomy is divided into categories that can serve as containers for other categories and/or services.

      a) **Searching the AIRS Taxonomy** – In the upper right corner of the AIRS taxonomy window is a search box. Type in a term or code to find services and categories of services that match your search term or code. Or, drill down (by clicking any of the services that appear as a blue link) from the top-level categories in AIRS to find a service.

b) **Categories of Services vs. Services** – All the terms that are listed in the AIRS Taxonomy are services. Some are also categories of other services. If a service appears as a blue link, this indicates it is a category with other terms below it, as well as being a service. Click on the link to “drill down” in the category to see lists of other services or categories of services. Click on the “Select” link to insert it into the search area. You can click on view to see descriptive information about the term.

Note: *ServicePoint has a user role/level, “Resource Specialist” in the application, specifically designed to manage these providers in the system.*

IV. ClientPoint

ClientPoint contains recorded client information. It can be referred to as your electronic “Filing Cabinet”.

A. **Searchable Information vs. Non-Searchable Information** – You can search for existing client records by entering a client’s first name, client’s last name, or the client’s Social Security number. You may also search for portions of these fields to maximize your search results. “Less is More!”

B. **Select a client** by using the Last Profile dropdown list (shows the last 5 clients, sorted by Client ID for that session only) **or** type in a client last name and/or first name and click search to find a record in the database.

Search a client name carefully before adding a new client to the system!

1. Creating a Named Client: A Unique ID is created based on the client name, gender, birth date and sound of a name (soundex). Unique ID is [first initial][first and third initials of last name][full date of birth][gender: M,F, T, U][soundex]. For example Bob Smith born on Jan. 1, 1980 will have the following UniqueID: bsim01011980b100s530

2. Creating an Anonymous Client: Adding a client as an Anonymous Client gives the client a Unique ID of ZZAnonymousxxxxxx. Unless you create an ID card or otherwise record the client number, no one will be able to search for or retrieve that client’s record.

3. Once SkanPoint has been enabled for an End User, the Client Number can be used to access a record in the database.

C. **Client Record Navigation Bar (Profile, Assessments, Case Plans, Service Transactions)** – When you choose a client, a new navigation bar appears that includes sub-tabs for the specific client’s Profile (summary front page), Assessments, Case Plans, and Service Transactions. All sub-tabs on the new navigation bar pertain to just this client. Navigating through the tabs shows only information for the client’s file which you've selected.

D. **Profile page** – The profile page is the first tab viewed after you select a client. The Client ID displays next to the client name at the top of page. The information displayed on the client's Profile tab includes the Client's Profile, and an assessment – as determined by your System Administrator.

1. **Client Name and ID Number** – In the upper left hand corner you will see the client's name and a system-generated ID number for the client you are working with. The ID numbers are generated sequentially for each new client that has been created. *You will also see information about whether or not the client has been given an ROI by your provider under the name and ID Number.*

2. **Client** – The first area on the client's Profile includes ONLY the client's first and last name and Social Security Number. Where this information has been closed or locked, the record will not viewable by other providers outside of your provider tree hierarchy, this is noted by a security icon next to the Client Name & ID Number.

3. **Households** – In order to create relationships between clients in the database, a household must be defined. The information for the client's household(s) and members will be located on each tab of the client record.

   a. **Creating a Household** – To create a household, click on the "Start a New Household" button within the client's profile page. A new window will appear and ask for information pertaining to the client's household. Then follow the page to network the household relationships by Type, Head of Household Status, and Relationships. Add new members one at a time, following the worksheet.
   b. **Adding a Member to a Pre-Existing Household** – You can add a client to a household that already exists by searching the system for existing households and editing to add new members.

4. **Collect Information on the Client Profile** – An assessment may be displayed on the Client Profile page. The assessment displayed here is configurable by your ServicePoint System Administrator. Additional Assessments to collect detailed client information can be found under the Assessments Tab of the client's record.

   a. Each assessment has its own security applied to it. This indicates whether or not the information on the assessment is being made available for sharing. The lock icon in the upper left hand corner of the assessment indicates the default security. You may or may not be given permission to change the status of the assessment security.
   b. The assessment displayed on the profile page is generally placed for ease of data collection. Be sure to complete all required fields in the client records to ensure good data quality.

c. Each question is a hyperlink that when clicked will call up a pop-up window that describes the question in more detail. You will also notice other icons next to a question such as vertical bar, a bold **H,** and a bold **G.** Each of these items can be clicked to display additional information about the question. The vertical bar contains information about the age of an answer. The bold **H** contains information about the history of an answer. The bold **G** can be used to create a goal for a client that is associated with a particular question.
d. Sub-assessments are sets of questions embedded within an assessment. Sub-assessments are used to collect responses for multiple instances of a grouping of questions. Examples would include emergency contacts, telephone numbers, sources of income, and disabilities.

5. **Release of Information (ROI) –** An ROI can be used with the following considerations and is dependent on System Wide security settings. See your ServicePoint System Administrator to determine the considerations that affect your use of ROI.

   a. If ROI is ON:
      i. Designed to prevent sharing of client information based on default security.
      ii. ROI is a dated trigger that will expire.
      iii. It is possible to enter information after the ROI expires; however this data can be seen only by Provider entering information where the settings apply.
      iv. Data entered during time range of client's ROI remains visible after ROI has expired.

   b. If ROI is OFF:
      i. This is simply a data placeholder for information regarding the collection of a Release of Information on a client.
      ii. The default security settings and exceptions for the provider will apply to all data entered on this record.

6. **Attachments** – File attachments in ServicePoint work similar to file attachments in an e-mail Program. Anyone who has the proper access can view the shared file. Examples are:, photo ID or resume. A .jpg picture can be saved here as a "Client Photo" and is used to create a ServicePoint client ID card. File size is limited to 2 MB.

7. **Infractions** – Infractions can be considered "Flags" on a record. Infractions are only entered by users to appear on a record to show (with the proper security) on the ClientPoint search screen, bedlist check-in, and on the client's profile page.

8. **Print Friendly and Issue ID card buttons**: A print friendly button is available if you wish to print out all of the information shown on a client's profile page. An "Issue ID Card" is available for printing out and issuing an ID card to a client

that contains the client's picture and a bar code that represents the client's ID number. This functionality is available to a User after enabling SkanPoint.

9. **Back Date button** – This button can only be used to backdate assessment information. Changing the assessment date and clicking on backdate allows you to add historical information to a client record. This can be critical to reporting change over time for your client's information.

10. **Orange buttons**: In the upper right hand corner of the Profile page there are a series of orange buttons that are used for adding additional information to a client's record.

    a. **Entry/Exit –** The Entry/Exit records a snapshot of a client when they enter or exit a program/agency's care. The Entry/Exit establishes when a client officially entered a program, and when they officially exited.

        i. **Entry** – The Entry consists of an Entry type (Basic Entry, HUD-40118, Standard Entry, Quick Call, and PATH), the date and time of the Entry, the provider for which the Entry is being recorded, and the associated assessment. The HUD-40118 Entry type is required for the client to be reported on the HUD-40118 APR. A Basic Entry and a Standard Entry differ only in name. If you are collecting information outside of the HUD-40118 requirements, these entry types can be used for different purposes.

        ii. **Related Entry** – Once a client has had an Entry worksheet created, the option to add additional to family members who are not already connected to the Entry record will appear.

        iii. **Exit** – The Exit consists of the date and time of the Entry, the reason for leaving, the destination of the client, the tenure and subsidy assigned to the client (if necessary), and the assessment associated with the exit.

    b. **ROI –** This button can be used to create a Release of Information (ROI) for a client or view information pertaining to other ROI's that are already in place. An ROI represents permission from a client to share their personal data with other agencies in the *ServicePoint* system. Only data collected during the date range of the ROI will be shared.

    c. **ResourcePoint**: - This button will bring up the ResourcePoint module in a separate pop-up window.

    d. **Case Workers –** This is a place to record information about case workers who are assigned to a particular client.

    e. **Security –** This button will show you the security currently assigned to the client profile information (First Name, Last Name, and SSN). This is important because if the client profile is closed then other providers cannot search for this client record.

E. **Assessments** – Assessments are the main part of collecting the client's information. Assessments are groups of questions, sorted by topic.

1. **Many different assessments** – Several assessments are pre-installed with ServicePoint, and can be used based on the needs of your installations needs.

    a. **Stock Assessments** - There are 15-20 default assessments available to ServicePoint users, including those with federal program universal data elements**.**
    b. **Configurable Assessments** – All the assessments in ServicePoint are completely customizable by a System Administrator II. The System Administrator II can select the assessments for your system, modify questions in the existing assessments, or create new assessments with new questions.

2. **Properties of the Assessments:**

    a. **History** – Located beside each question in an assessment is the letter "H." This "H" is for the assessment question's historical information. Click on the "H" to see answers that have been entered previously for this question.

    b. **Goals** – Located beside each question in an assessment is the letter "G." This "G" is to create a goal associated with this question. The goal type and classification are stated with the date the goal is created. The goal automatically gets a case note of: *"This goal was created while editing XXXX assessment, YYYY question. Where X is the name of the assessment and Y is the name of the question."*

    c. **Sub-Assessments** – Sub-Assessments are miniature assessments in that they are a collection of questions. The main difference in assessments and sub assessments is that regular assessment questions have one and only one answer. With an assessment question, more information can be found by accessing that question's history, but only one answer is current. With a sub assessment, multiple answers can be current. Examples of sub-assessments include: Disabilities, Emergency Contacts, and Income.

F. **Case Plans** – Case Plans is the area within the client's information where the Goals are identified or goals that have already been identified by means of entering the goals using the "**G**" by the assessment questions can be viewed. In order to view all information about goals that are already identified, click on the pencil icon to edit/view more information about that particular goal.

1. **Goals** – Goals for the client can be identified and later related to services to give a more complete case management view.

    a. **Follow-Up** – The Follow-Up utility can be used within a Goal, an Action Step, and any service being provided. The Follow-up adds a reminder to each user's home screen allowing them to click directly to that client or that client's item to be followed-up. The Follow-Up can be incredibly useful in that it automatically creates the reminder based upon the date that you give it, and since it is shown on the Home screen, it is one of the first items that a user will see upon logging into ServicePoint.

        i. **How follow-up works** – At the bottom of the Goal, Action Step, and Service provided screens there is an option to enter a Follow-Up. The four questions are: Projected Follow-Up Date, Actual Follow-Up Date, Follow-Up Made, and Outcome at Follow-Up. Of those items, only the projected follow-up date is required to flag the home page. The other questions are to be answered on or after the actual follow-up have occurred or have been determined to not occur.

    b. **Case Notes** – Case Notes can be entered for each goal to add additional information.

    c. **Action Steps** – Action Steps are actions that are planned upon to help the client fulfill their goal. Action Steps are free-form and can be whatever is necessary.

    d. **Needs/Service Items for Identified Goals** – Once a goal is defined, a need can be identified from that goal. Multiple needs (from the AIRS taxonomy) can be added to each goal.

G. **Service Transactions** – The Service Transactions section of the client's record allows you to add, edit, and view all needs associated with the client and all services and referrals associated with those needs. You must identify a need in order to provide a service or referral. ServicePoint has the capability to provide one service at a time or provide multiple services at a time and the transactions all appear in this display.

1. **Add Need/ Service –** Create a record by adding the need then the service or referral with any additional detail.

2. **Referrals** – Once a need has been identified, the user may record a referral for a client and choose to electronically send notification to other ServicePoint providers.

3. **Add Multiple Services** – Use the quicklist to add groups of services to records.

4. **View Past Needs/Services** – In order to see any needs that have already been identified once you first reach at the Service Transactions page, click on the

button labeled “View Past Needs/Services” and manage the display according to the record set you need to view.

5. **Identifying Needs as completed** –Once outcomes have been determined, you can edit the Need Status to track outcomes.

6. **Add Transactions** – Add additional service or shelter transactions from ShelterPoint or SkanPoint.

V. ShelterPoint

ShelterPoint is the part of ServicePoint where you can manage shelter activity, including client check-ins, check-outs, reservations, entry/ exits and service delivery. It can be referred to as the “Client Roster”.

A. **Bedlists** – The Bedlists are created in the Provider Administration page, located under the Admin tab. All bedlists follow the same structure of number of beds, beds per room, rooms per floor, and multiple floors (if necessary). Default sort is by floor. Create bedlists with numbering like a hotel – 101.1 or 101a, 101.2 or 101b.

B. **Client Reservations** – In order to place a reservation for a client to a shelter simply click on the Add Reservation button located in the Reservations section of ShelterPoint. After selecting the client give the client a reserve date and save. Clients must later be assigned a bed in the bedlist to have a complete shelter transaction.

C. **Checking in a Client** – Click on an Empty Bed to check a client into shelter.

1. From the main ShelterPoint screen you can edit or convert shelter referrals to check-ins. Click the checkbox Show Outstanding Referrals and click on the check-in hyperlink next to the person’s name.

2. You cannot enter a client into a single bedlist more than once for the same time period.

D. **Client Bed Stay Data** – This can be seen when you check a client into a bed and later, by clicking on the client’s name from the bedlist. The bed stay data contains all the information pertinent to the client’s shelter visit, including the client’s name, bed name, household members bed assignments, the bed ID, and several optional areas for locker number, supplies given, and any codes/notes that may be necessary.

1. You can enter a date in and a date out from this screen for the client.

2. You can quickly navigate into other tabs of a client’s record from the bed stay data.

E. **Checking out a Client** – In order to check a client out of ShelterPoint, simply click on the client’s name and in the client’s bed stay data, enter a checkout date. When the client is checked out, the status of the need that was created when the client checked in will now be listed as Closed, and the outcome for that service transaction will be Fully Met.

1. **Update Confirmation List** – The Update Confirmation List function is used to list all client's currently in the bedlist and their confirmations for the night.

2. **Transmit Today's Checkout** – The Transmit Today's Checkout is intended to checkout all clients who are not confirmed for the night's stay all on one worksheet.

3. **Future Checkouts** – If you create a checkout date for the future, the client will be removed from the bedlist on that date. The shelter services will accurately reflect the dates of the check-in and the check-out.

VI. SkanPoint

In SkanPoint, use Client IDs to quickly add service transactions to groups of clients. Or provide, "Bulk Service Delivery".

1. **Choose Need Service** – Can provide same service to multiple clients at same time instead of individually. Choose Need Service screen is same as requested on Service Transaction screen in ClientPoint.

2. **Manage Clients in Client List** – In this area you can add a new client list, or manager (make changes) to an existing client list.

3. **Generate Bulk ID Card –** In this section, you can choose to generate ID cards for everyone in your ServicePoint site or select a list of names to generate ID cards.

VII. Reports

There are 3 reporting options in ServicePoint: 1) Canned Reports ("Provider" Reports), 2) Custom Queries (through Report Writer), and 3) Custom Reports (via ART – the Advanced Reporting Tool).

A. Canned Reports:

1. **Audit Reports –** ServicePoint maintains the integrity of a client's electronic record by recording the Users that access client records down to the key stroke.
    a. **Client/Service Information**
    b. **User Information**
    c. **User Login Information**

2. **Provider Reports** – The Provider Reports are also called "Canned Reports" because they are pre-formatted and pre-established reports based on date ranges and other information provided by the user. You can print any report by clicking on File (in your web browser) and then clicking on Print. Each of the Canned Reports has documentation for your review.

   a. **Client Served Report**
   b. **Daily Bed Report**
   c. **Entry/Exit Report & HUD-40118 APR**
   d. **PATH**
   e. **Outstanding Referrals**
   f. **Service Transactions Report**
   g. **Needs Report**

B. **Custom Reports**

1. **ReportWriter –** ReportWriter is a data extract tool (not a data query tool) to build and save your own reports from the system tables in ServicePoint. Select the tables, fields, filters and options to query the ServicePoint database.

2. **Advanced Reporting Tool -Advanced Reporting Tool (ART) –** Use ART to create and view reports on information in ServicePoint. For more information, contact your System Administrator.

VIII. Admin

The Administrative sections of ServicePoint allow you to create Provider Groups (for reporting purposes), to create & update User Profiles, to create & maintain Provider Profiles, and to administer the news items published under Agency Newsflash on the ServicePoint Home tab. See the User Levels section of the online Help File for further information and to assist in determining which users have access to sections of the Admin area in ServicePoint.

A. **Provider Groups –** Provider Groups allow System Administrators to create provider groups consisting of varied providers across trees, to be able to report on them collectively (e.g., all food banks, or all domestic violence shelters). Likewise, Agency Administrators can create provider groups consisting of providers within their respective trees (or tree sub-branches).

1. **Creating a new Provider Group** – To create a new provider group, choose to "Add New Group" then select the level one provider that you would like to add providers from. Select the providers that you do NOT wish to include from the right hand area, and then remove them.

Continue to add providers that you would like to include in your provider group in the same fashion.

2. **Modifying a Provider Group** – To modify a provider group once it is created, select the provider group from the created lists, and click "Manage Providers."

B. **Users** – In the Users section of the Admin tab new users can be created, or existing users can be modified or deleted. Select the user to modify, then check or uncheck options as appropriate. *Providers must have Licenses allocated in order to attach the user to the appropriate provider.

1. **Access Level** – The Access Level of the user is very important. For a full description of the permissions for each ServicePoint user, please see the help file. You may want to fill in the Expiration Date for a temporary employee, for example.

2. **Special Permissions** – There are special permissions that can be given to each user.

   a. **Allow User to Back-date Releases of Information** – This permission will allow the user to modify the ROI Start date. This is a special permission because back-dating the ROI should only be done when the actual date of the ROI is different from the current date.

   b. **Allow User to Change the Security of their Client's Assessments** – This permission will allow the user to change the security, on a per-client basis, for a client's assessment by clicking on the security icon (open/closed lock).

   c. **Allow User to Create/Edit Client Infractions** – This feature gives the user permission to create or edit the Infractions section in ClientPoint or Client screen in ShelterPoint.

   d. **Allow User to use the SkanPoint module** – This permission will simply give this user the ability to access the SkanPoint module. This permission is dependent on the System Administrator II's enabling SkanPoint for the site. If SkanPoint is not enabled for the site (in the System Configuration) then users will not be able to access SkanPoint regardless of this particular special permission. This function also enables a user to search for a client record by ID Number in ClientPoint, and create or print ID Cards.

   e. **Allow User to Use Quick Call feature** – This permission will allow the user to use the Quick Call feature of ClientPoint. For more information on the Quick Call please see the Help file.

f. **Allow User to Use the CallPoint module** – Checking this box gives the user access to CallPoint features within ServicePoint if the provider is identified as a Call Center and the CallPoint module has been purchased and is turned on for that provider.

g. **Allow User to Use the ShelterPoint Module** – Check this box to give a user permission to use the ShelterPoint module in ServicePoint.

h. **Allow User to Manage Only Unnamed Clients** – To give the user permission to manage unnamed clients click here. User will not be able to managed named clients when this permission is in effect.

i. Additional Special Permissions may be available for your site, depending on the modules purchased for your ServicePoint Implementation.

3. **ART Reporting Licenses** – Users can be assigned either an ART-Viewer or an ART-Adhoc reporting license if:

a. The ServicePoint Implementation has an ART Installation, and if
b. ART Licenses have been purchased, and if
c. ART Licenses have been allocated to the User's Provider (or Parent Provider), and if
d. The ART Licenses are available (i.e. not otherwise assigned to another user).

4. **Enter Data As Privileges** – Users can be assigned "enter data as" responsibilities to be able to record data on behalf of other Agencies/Programs without having to tie-up more than one purchased ServicePoint User License. When entering data as another provider, the User's access level is automatically changed to that of a Case Manager II.

C. **Admin Providers** – This section of the Admin tab contains setup in ServicePoint. For more information for each of the providers listed in the system. This page is very important as it also contains security information for each provider, which in turn, entails the security for each client in the system. Each Provider Profile contains the following sections:

1. **Provider Details** – contact and location information for the provider to be displayed in ResourcePoint.

2. **Child Providers/ Sibling Providers** – Providers considered subordinate, or an agencies programs or sites.

3. **Search Terms Information** – Additional information to limit the searching of a provider in ResourcePoint.

4. **Services Provided** – Coding the provider for ResourcePoint based on taxonomy.

5. **AIRS Standards Information** – Specific to 211 or Information and Referral Providers.

6. **Shelter Information** – Generate Bedlists for ShelterPoint.

7. **Shelter Service Code** – Specify the taxonomy code for the list, i.e. Emergency Shelter or Permanent Housing**.**

8. **HUD Standards**- Specific to HUD Funded Programs, contains Continuum of Care Data.

9. **System Configurations**:

   a. **Provider Settings**- Configure based on needs of each provider.
   b. **Client Search Configuration** – Ability to add/ remove client demographic display.
   c. **Service Settings** – Create quicklists to assist users for easy data entry.
   d. **Multiple Service Configuration** – Configure end user settings for easy data entry.
   e. **ShelterPoint Configuration –** Create a one page data entry worksheet to meet a programs needs, including ROI, Entry / Exit and Multiple Services.
   f. **Restrictions and Exceptions Settings** –
      i. **Potential Exceptions** – Make exceptions to a provider's default security.
      ii. **Provider Default Restrictions and Exceptions** – Set static and dynamic information to have open or closed security settings when entering client information.
   g. **Assessment Administration Settings** – Place assessment throughout the client record navigation to facilitate data entry.
   h. **Household Data Sharing Assessment Administration Settings** – Place assessment questions that will populate to all members of a household.

IX. **Agency News Administration –** Agency Administrator can add news items that will be visible to everyone in that agency tree.

X. **Help –** Links to most recent version of Help for ServicePoint.

XI. **Logoff –** Click logoff when you leave your workstation for security!