ServicePoint - ClientPoint Check List

1/23/2015

Entry

- **Enter Data As (EDA)**
- **Backdate to entry date (8:00am)**
- Add client
- Add additional members

From Summary Tab:

- Complete **ROI,** include all members
- Click Add **Entry**
- Complete **Household Data Sharing** (HoH include all members)
- Complete **Entry Assessment** for each member
- Complete **Initial Measurement** for HoH only
- Add **Case Manager -** include all members
- **Add Service**: Case Management include all members
- **Add Goals**: Housing (min) include all members

Interim

- **Enter Data As (EDA)**
- **Backdate to interim date (8:00am)**
- Find Client (HoH)
- Check to make sure **ROI is up to date**
- **Select Entry/Exit Tab** - click on interim or (Click pencil next to entry date on summary page)
- Add **Interim** (Update or Annual) for all members
- Complete **Interim Measurement** (Point of Measurement) for HoH only

Exit

- **Enter Data As** (EDA)
- **Backdate to exit date (10:00pm)**
- Locate HoH Client
- Complete **Exit Assessment** for each member
- Complete **Exit Final Measurement** (Point of Measurement) for HoH only (Measurement Tab)
- End **ROI** include all members
- End **Goals** include all members
- End **Case Manager-** include all members
- End **Service**: Case Management include all members