ServicePoint 5 – The Order of Data Entry

This is a quick overview of the basics needed to properly complete a client record in ServicePoint 5.0. **Note that required data elements may change with updated HUD standards.** For detailed instructions, please click "Help" in ServicePoint to load the software manual.

1) **ClientPoint -** enter the Head of Household's name and click Search. If found, click on name. If not, enter SSN and select SSN data quality and click "Add New Client with This Information".

2) **Household tab -** Click "Start New Household". Add all household members. Note when setting the relationship, it is the relationship of the person to the HoHH. "Date Entered" should be the same as the date client entered your program, or before (best practice: use the 1st of the month the client entered your program – i.e. if the enrollment date was Jan 15, use Jan 1 as the "date entered"). When done adding household members, click "Exit".

3) **Entry/Exit tab –** Check off all household members. Record the date, program, and entry type. Click Save.

4) **Complete profile for the Head of the Household -** Fill in the information on the Entry screen for the HoHH. Questions/items in **red text** are required for proper reporting. Where applicable, try and only select answers that are followed by "(HUD)" or "(HUD-40118)". If the household is a single person, click Save & Exit. If not, go to step 5.

5) **Add Household Data –** If the household has more than one person, click the "Add Household Data" button. This will copy pertinent information from the Head of Household to other family members. When the Household Data Sharing window pops up, check all household members. Click "Save and Close".

6) **Family Members' Profiles –** After the data has been completed for the Head of the Household, click through the members of the household (they will be listed on the left side of the entry screen). Complete the entry assessment for each household member. Answer all questions. When done with the entire household, click "Save & Exit".

You are now done with the entry!

There are some more things you'll need to do as time goes on…

ANNUAL UPDATES - At a minimum, do the following annually if clients are in your program for 1 year or longer:

- ☐ Update income and non-cash benefits for the household – use "Interims" from the Entry/Exit tab to easily complete an annual update.
- ☐ If required by your program's funding, Record Service Transactions provided by your agency to the client/household. For Annual Progress Report (APR) reporting, you only need to record the services once (because the report counts the number of people who received the service during the year, not the number of times you provided the service). If your program needs to report on services provided more often, and you do not have another software system to record the data, you will need to actually record services as they are provided.
- ☐ **If clients are in your program for less than 1 year, but your program has any HUD-funding, it is a good idea to update the client income for any clients who have not exited your program approximately 1 month prior to any HUD reporting period to show income progress.**

At EXIT:

- ☐ Click on the pencil next to the Exit Date from either the Summary or Entry/Exit tab.
- ☐ Check off all family members and record exit date, destination, etc. Click "Save".
- ☐ From the exit screen, update income/non-cash benefits to reflect any changes that occurred while the person/household was on your program. **Update Housing Status to reflect status at program exit.**
- ☐ Click "Add Household Data", check off all family members, and then click "Save & Exit" to update the housing status at exit for the entire household.
- ☐ Complete the Exit Assessment for each household member – update everyone's income information! When done, click "Save & Exit".
- ☐ Record Service Transactions that were provided between the last update to the client record and the exit date (if required by your program's funding).