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ABSTRACT

This document is a short tutorial for HHS PATH programs using ServicePoint. All HHS PATH programs utilize an Entry/Exit workflow.

What is Entry/Exit?

An Entry/Exit is a workflow sequence in ServicePoint used for programs that have a specific client entry date, a period during which a client is in the program, and a specific client exit date. The goals for PATH are getting the client comfortable to engage and agree to services, and referring the client to other agencies that can also help the client.

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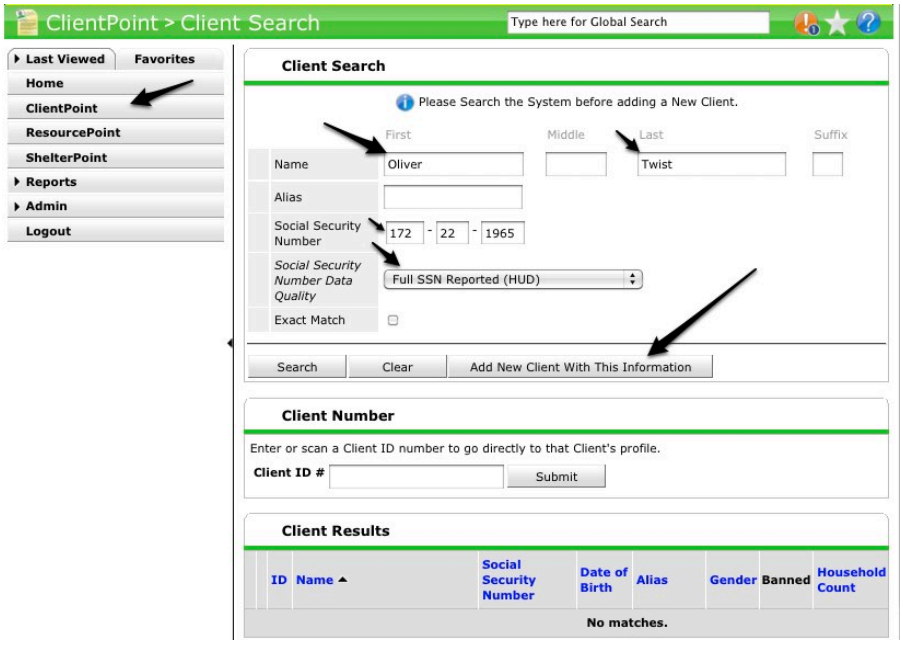
Client Entry

Create an entry for every client you come in contact with.

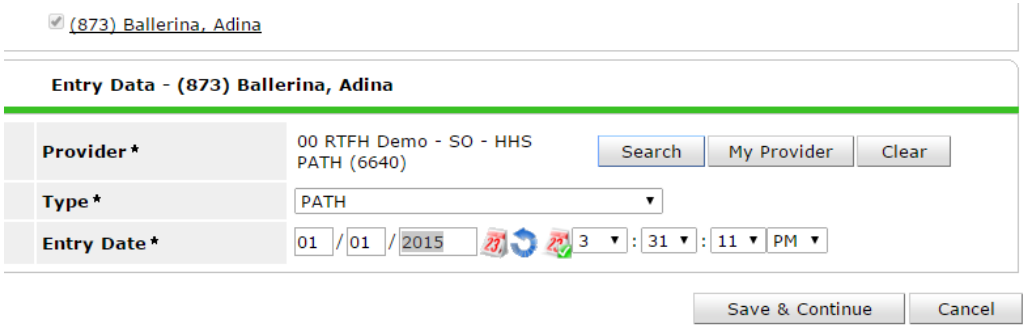
Note: Use the Entry page only for data that is true for the client on the entry date.

1) Get started.
   a) Logon with your username and password.
   b) Check the default program located on the top left of your screen. If it's the correct HHS PATH program, continue. There are two available HHS PATH program types: "Street Outreach" and "Services Only."
      i) – OR – Click the EDA link to change to the correct program.
   c) Set the Back Date to be the same as the client entry date.
   d) 

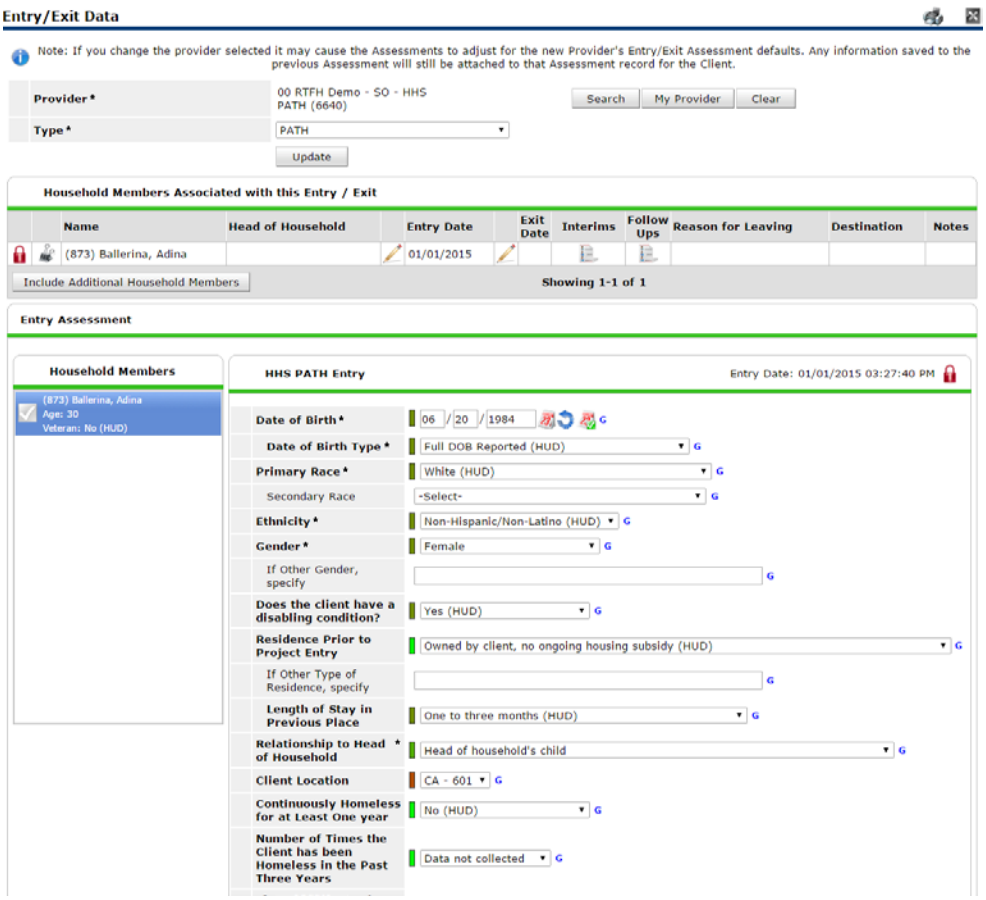
2) Search for your client
   a) Click on *ClientPoint*
   b) Enter the client's First and Last Name and SSN to search for him/her.
      i) – OR – Search by client ID#.
   c) Review the list of possible matches ServicePoint displays.
   d) If you see your client, select him/her by clicking on the **+** sign
      i) – OR – Click *Add New Client With This Information*.



3) Create a Release of Information (optional but recommended)
   a) Click the *ROI tab*
   b) Click *Add Release of Information*.
   c) Complete the fields
   d) The End Date is agency-defined, but should be *<u>at least one year</u>*
   e) Click *Save*.
   f) If you have the signed ROI ready for upload, click the *binder clip* on the right to upload a file.
4) Create a Household (if applicable)
   a) If the client is in a Family, create a Household that includes all members of the household living together. See the "Adding and Updating Households in ServicePoint" workflow documentation for instructions or contact the RTFH.
5) Enter the client and household into your program
   a) Click the *Entry/Exit tab*
   b) Click *Add Entry/Exit*
   c) For a household, click the checkbox of each household member entering.
   d) Select the Type: PATH and click *Save & Continue*.



   e) Complete all questions/fields for the "HHS PATH Entry" assessment.
   f) Click *Save*. Make sure all of the bolded items have rectangles next to them when done.



g) Click *Save & Exit*.

Interim Review

If something in the client's situation changes while enrolled in the program, you must do an Interim Review; do not update information on the Entry. If the client chooses to engage in PATH, you must do an Interim Review to change "PATH Status."

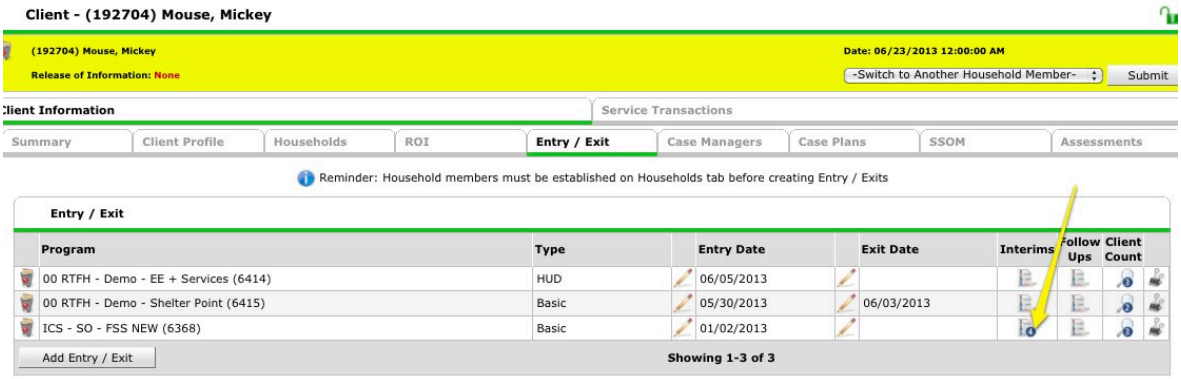
Note: the Date of Engagement must be on or before the date the client is enrolled in PATH (PATH Status = Yes).

Note: Use the Interims icon only for data that is effective during the program stay (after the entry date and before the exit date.)

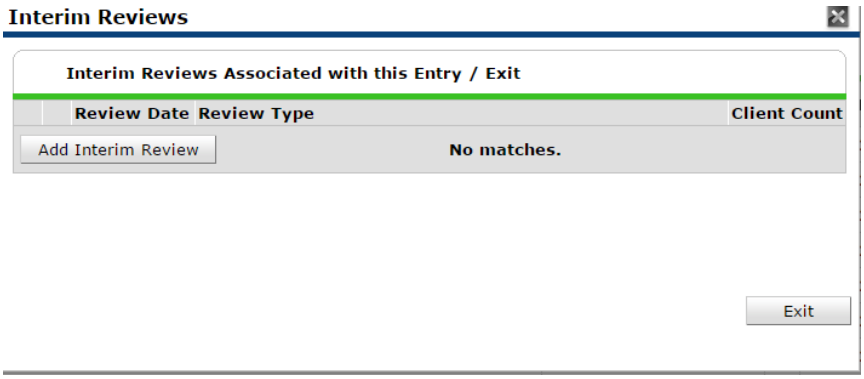
1) Get started.
   a) Logon with your username and password.
   b) Check the program you are logged on to. If it's correct, continue.
      i) – OR – Click the *EDA* link to change to the correct program.
   c) Set the <u>Back Date</u> to be the same as the client <u>Interim Review</u> date.
2) To find the client
   a) Click on *ClientPoint*

b) Enter the client's First and Last Name and SSN to search for him/her.
   i) – OR – Search by client ID#.
c) Review the list of possible matches ServicePoint displays.
d) When you see your client, select him/her by clicking on the name or the edit pencil

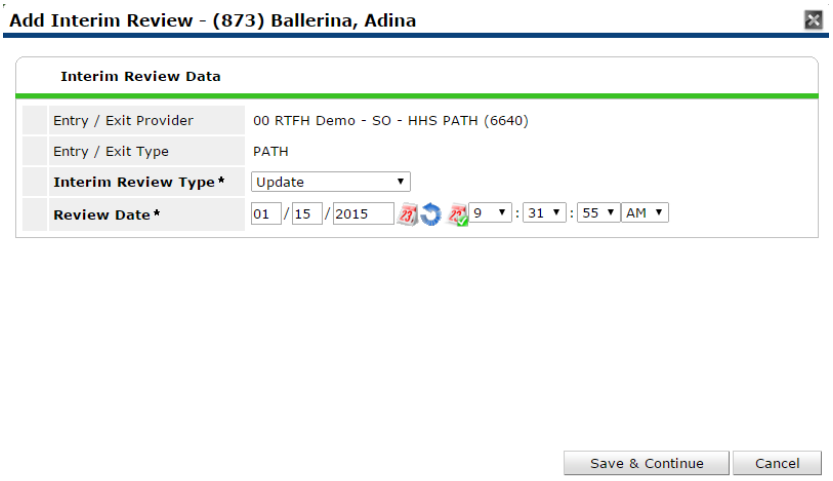
3) To add an Interim Review,
   a) Click the *Entry/Exit tab*
   b) Click on the '*Interim Review' icon* next to the correct program.



   c) Select *Add Interim Review*.



   d) Choose "Update" and input the accurate review date (or the date that the change took effect.)
   e) Click *Save & Continue*



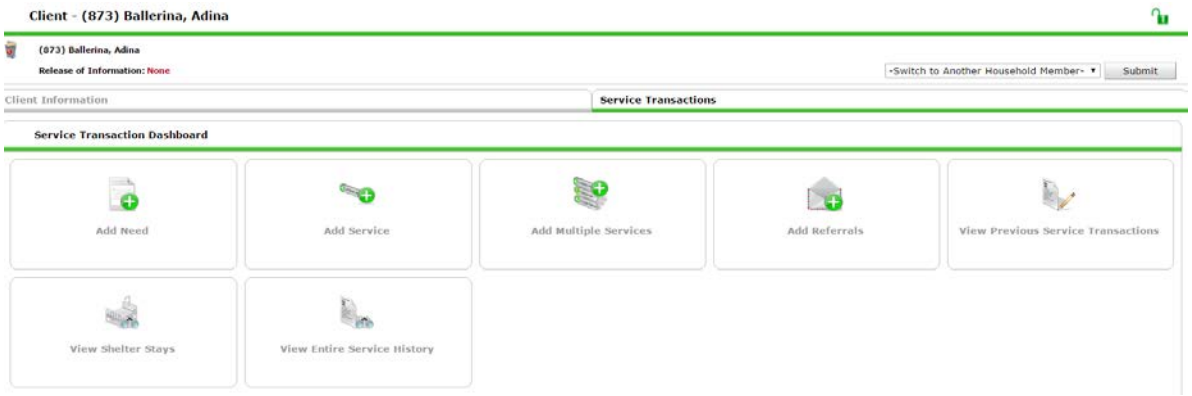
f) Complete all applicable questions/fields for the “HHS PATH Update” assessment. Click the *Save*.
g) If any data from the “HHS PATH Entry” assessment has changed and needs to be updated, update it via the Interim Review by clicking on that element and updating that information, as well; do not update information via the Entry. If nothing changed from the “HHS PATH Entry” assessment, click *Save & Exit*.
h) If the client enrolls in a PATH project, you must record Services and Referrals for client (see “Services” and “Referrals” below). If the client does not enroll in a PATH project, exit the client. (see “Client Exit” below.)

Services

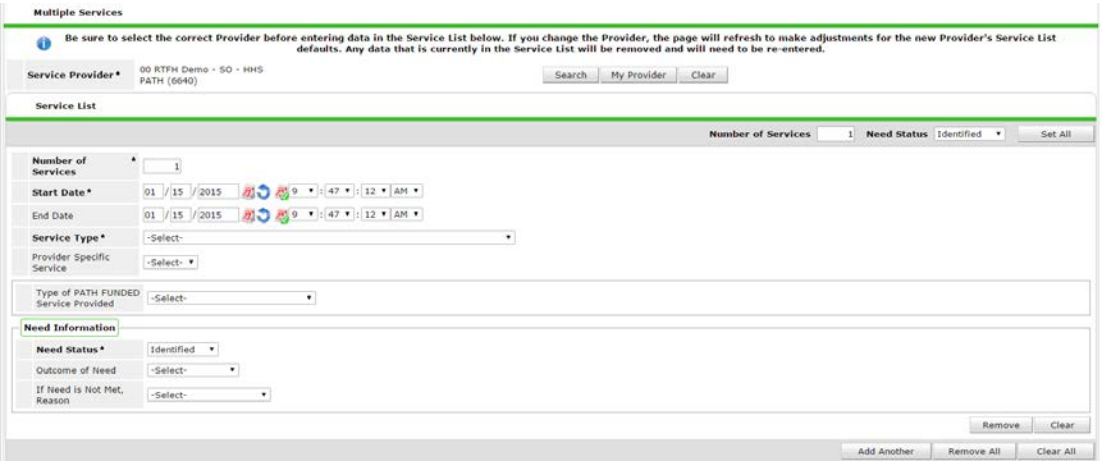
PATH-funded services that you provide to the client should be recorded. Entering services that are not PATH-funded is not required, but is encouraged. These can be entered any time after the Entry date for the client, but before the Exit date; they may be entered before or after PATH enrollment.

How to Add Services
You’ll always add a service for a client who is already entered in your program. (The Entry must be before or on the same day as the service.)

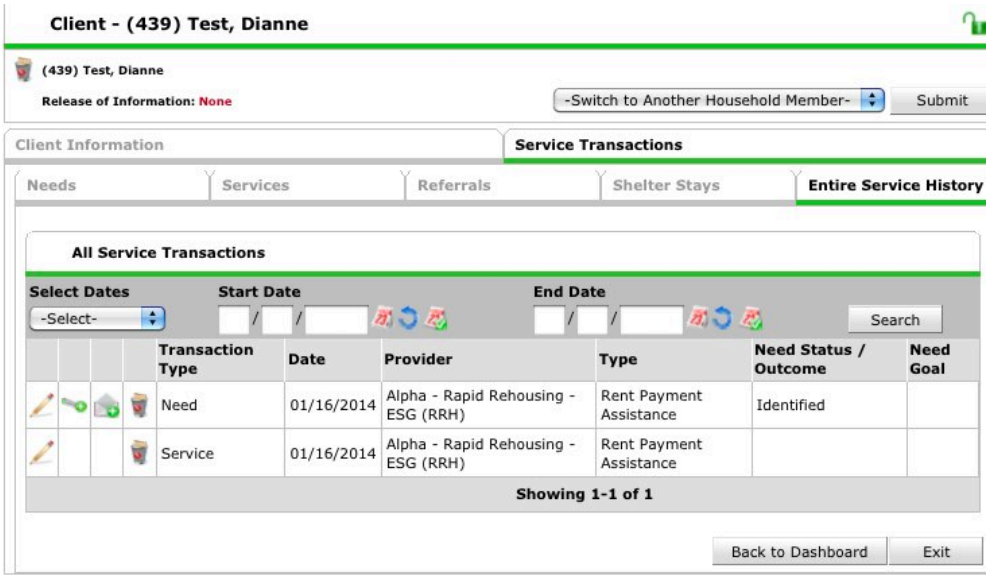
1) Get started.
    a. Logon with your username and password.
    b. Check the program you are logged on to. If it’s correct, continue.
        i. – OR – Click the Enter Data As link to change to the correct program.
    c. Set the Back Date to be the same as the service date.
2) To find the head of the household
    a. Click on *ClientPoint* at the left
    b. Enter the client’s First and Last Name and SSN to search for him/her.
        i. – OR – Search by client ID#.
3) When you see your client, select him/her by clicking on the client name (or the pencil). This will take you to the client profile page.
4) Click on the *Service Transactions* tab
5) Click on “Add Multiple Services”.



6) Update the Start Date and End Date for the service if necessary. The Start Date and End Date should be the same, which is the date the service was provided.
7) Select the correct Service Type.
8) Select the correct “Type of PATH-FUNDED service.”
9) Change “Need Status” to “Closed.”
10) For “Outcome of Need”, select “Fully Met”.
11) If you have no more services to ad for the client, click “Save and Exit”.
12) If you have one or more services to add, select “Add Another”. Repeat steps 5-10 as necessary.



13) Notice that the page expands.
14) Optionally upload Supporting Documentation.
15) Optionally add a projected follow-up date that will then make this follow-up appear on your home page.
16) Click *Save & Exit*
17) You’ll be returned to a page that lists the entire Service History for this client.

18) 

Referrals

What is a referral in ServicePoint?
Your program distributes services to your eligible clients. Sometimes your program doesn't have the means to distribute the service needed at that time, but you know another program at or outside of your agency that does, so you send your client over there to receive the service instead. You would only add a *Service* in ServicePoint if your program *directly* delivered the service to the client. You would create a *Referral* when you notify the client of another agency or program that can help them.

Note: Referrals are created per need type. You can select up to five needs and the system will show you which programs provide those services. A referral is made when you send service requests to specific providers. You must record the first five referrals of the same type. (For example, if you create a referral for Substance Use Treatment and Security Deposits, you only need to specify five providers in Service Point. You may contact other providers who can provide the service, but only five need to be recorded in the system.)

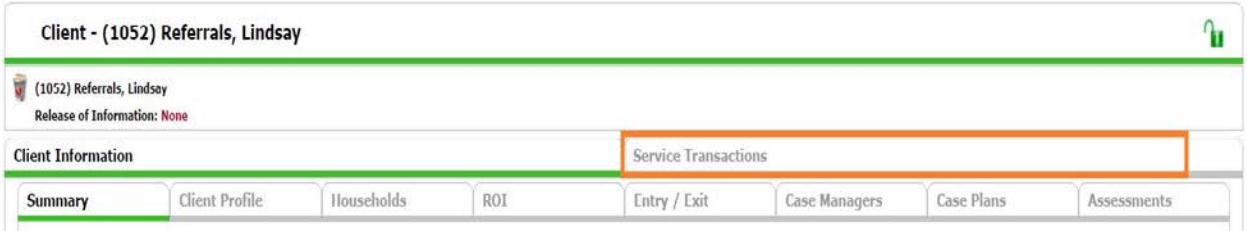
How to Create a Referral

1) Get started.
   a) Logon with your username and password.
   b) Check the program you are logged on to. If it's correct, continue.
      i) – OR – Click the *EDA* link to change to the correct program.
   c) Set the <u>Back Date</u> to be the same as the client <u>Referral</u> date.
2) To find the client
   a) Click on *ClientPoint*
   b) Enter the client's First and Last Name and SSN to search for him/her.
      i) – OR – Search by client ID#.
   c) Review the list of possible matches ServicePoint displays.

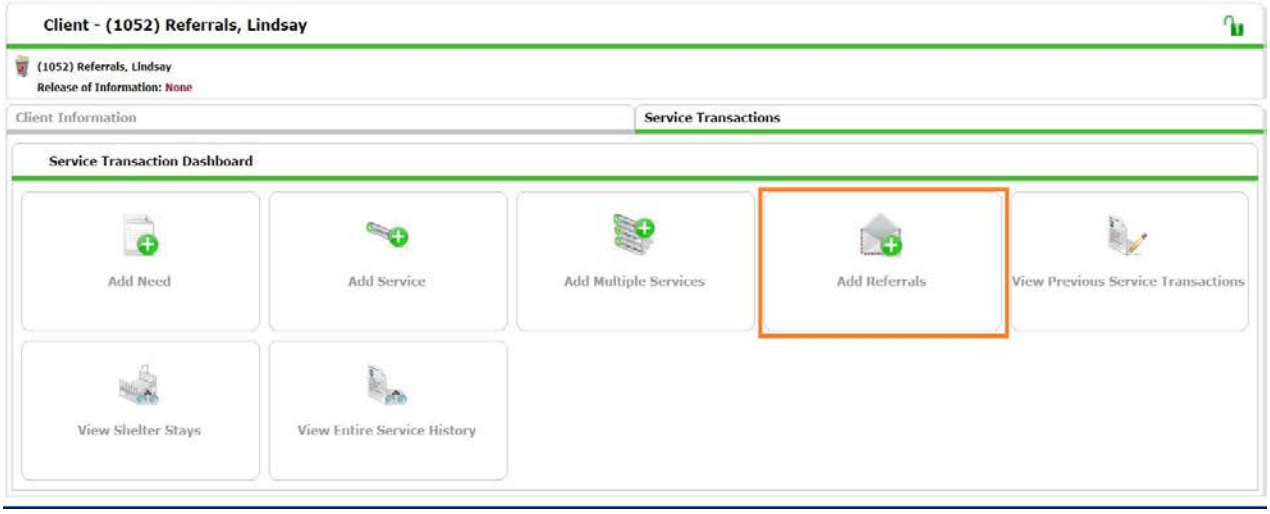
d) When you see your client, select him/her by clicking on the name or the edit pencil

3) Create the Referral

a) From the client's profile, click on the *Service Transactions* tab



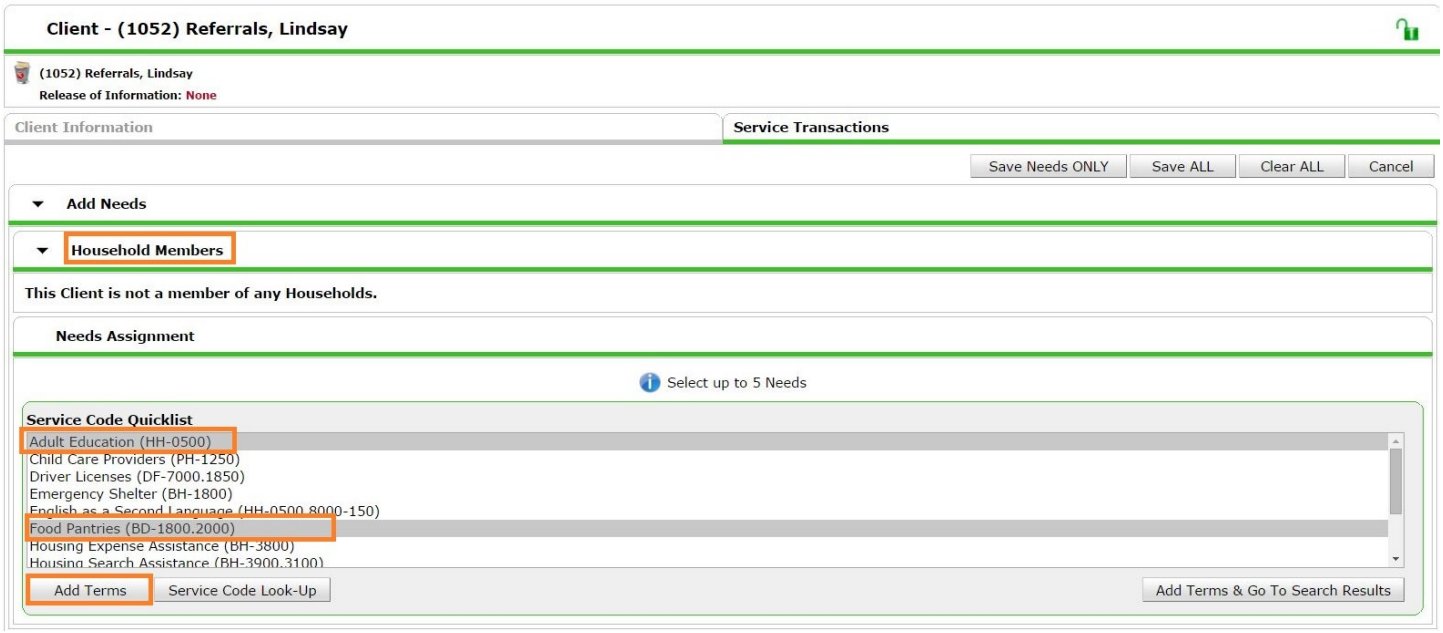
b) Click *Add Referrals*



i) Select type of Referral

(1) Select the service from your *Service Code Quicklist*

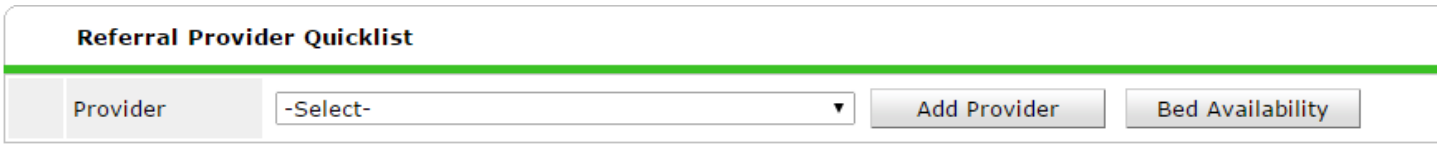
(2) Click *Add Terms* to add the services to this referral



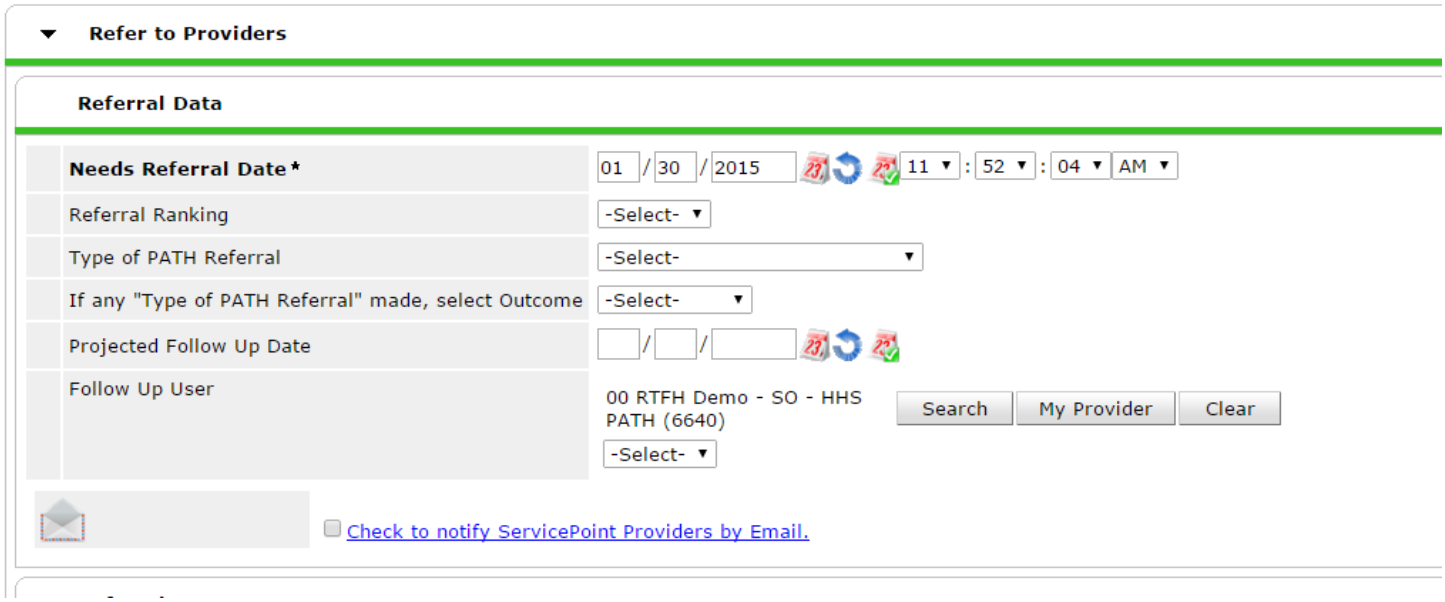
(3) From the Referral Provider Quicklist, select the provider from the dropdown menu and click *Add Provider.*

(4) Click *Add Provider.*

c) The providers you selected from either your *Referral Provider Quicklist* or the *Provider Search* feature now appear below. If you made a mistake or wish to remove the referral from the provider, you can delete the provider from this referral by clicking the red minus sign next to the provider name.



Important: Select the amount of providers the referral was made to. If you referred the client to one agency, select "Referral Made to Provider A". If you referred the client two agencies, select "Referral Made to Provider A" and "Referral Made to Provider B", and so on. If you referred the client to more than five agencies, select all 5. Only five referrals are necessary to record.



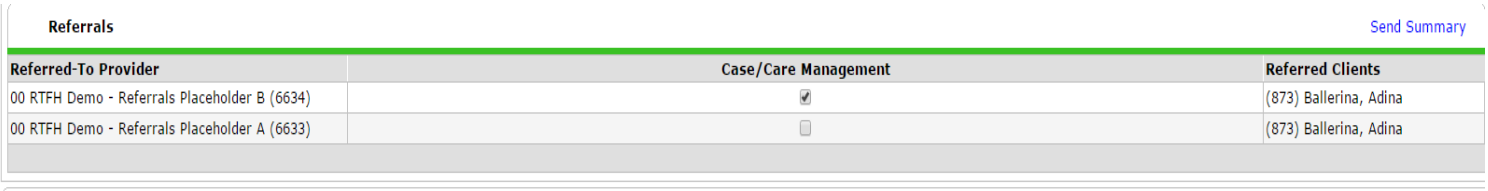
ii) Enter "Referral Data".

(1) Select the date that you made the referral.

(2) Select the correct "Type of PATH Referral".

(3) Select correct Outcome for Referral. If the client was connected and received the service, select Attained. If the client was never connected or did not receive the service, select Not Attained. If you are not sure whether the client connected with the provider or whether the client received the service, select Unknown.

(4) Optional: You may add a Follow-Up date that will display on your home page dashboard and notify you when you need to follow-up with the client.



iii) In “Referrals box”, Check all box(es) under referral type. Skip *Need Data*.
iv) Click *Save ALL*.

You will be taken to a page that lists all referrals that were made on behalf of the client. If any need to be edited, click the pencil next to the referral. Otherwise click *Exit* to return to ClientPoint or *Back to Dashboard* to return to the *Service Transactions* dashboard.

Client Exit

Use Client Exit when your client is discharged from the program.

Note: You must do an Exit for a client if they leave or complete the PATH program. You must do an Exit for a client if they are determined to be ineligible for PATH. All data recorded at exit date should be true as of exit date.

1) Get started.
   a) Logon with your username and password.
   b) Check the program you are logged on to. If it’s correct, continue.
      i) – OR – Click the EDA link to change to the correct program.
   c) Set the Back Date to be the same as the client exit date.
2) To find the client
   a) Click on *ClientPoint*
   b) Enter the client’s First and Last Name and SSN to search for him/her.
      i) – OR – Search by client ID#.
   c) Review the list of possible matches ServicePoint displays.
   d) When you see your client, select him/her by clicking on the name or pencil
3) Complete all questions/fields for PATH Exit Assessment.
   a) Make sure you verify and/or update all fields
4) You are done with Client Exit.