ClientPoint Module
Entry/Exit Workflow SP5.11 (Household)

Note: If your default provider log-in is not the program where data is to be entered, then:

- Click the **"Enter Data As"** function (upper right hand corner) to switch to the correct program.

Note: Click **"Back Date"** function (upper right hand corner) if entering data from a previous date that is not the current date

- Change the date to the information date.

ClientPoint Tab (Left Side Column)

1. Locate an Existing Client
    a. Enter the client's First and/or Last Name and/or partial SS#
        i. Click the icon from the results list
            1. Skip to 3.
    b. Enter the client's ID# if known
        i. Click the icon from the results list
            1. Skip to 3.
2. Add a New Client and Household
    a. Enter client's First Name, Last Name, and Social Security #
        i. Click "Search"
            1. Click "Add New Client"
                a. Click "Add Client and Add New Household" (Add New Household Screen will Pop-Up)
3. Add New Household Screen
    a. Select Household Type
    b. Enter First Name, Last Name, and Social Security # of Household Members.
        i. Click "Search"
            1. If already in the system, Click
            2. If NOT in the system, Click "Add New Client"
                a. Once all Household Members are added, Click "Continue"
                    i. Select appropriate "HoH Status", "Relationship to HoH", and "Joined Household Date" (Only one person can be the Head of a Household in a family)
                        1. Scroll down and complete the assessment
                            a. Click "Save"
                                i. Continue to complete for all Household Members, after last member, Click "Save and Exit"

NOTE: A popup display titled "Review Household Data" will be displayed once you hit Save & Exit. This box asks you to review the data or accept it as is.

5. Click the "ROI" Tab (located under the Client Information Tab)
    a. Click "Add ROI"
        i. Select All Members of the Household
            1. Ensure that the Provider is correct. (If need be, select correct Provider.)
            2. **Release Granted:** Enter "Yes" if Client has sign Release form.
            3. **Start Date:** Enter date the ROI was signed.

4. **End Date:** Enter date the ROI expires. (Client specified date or 1 year, whichever is shorter.)
5. **Documentation:** Select the type of documentation.
6. **Witness:** Enter witness name if applicable.
   a. Click "Save ROI"

6. Create an Entry
   a. Click the "Entry/Exit" Tab (Located under the Client Information Tab)
      i. Click "Add Entry/Exit"
         1. Select all Household Members that the Entry will apply to.
         2. Ensure that the Provider is correct. (If need be, select correct Provider.)
         3. **Type:** Select type of Entry/Exit. (All CoC and ESG projects will use the HUD Entry/Exit, ***ONLY*** PATH projects will select the PATH Entry/Exit)
         4. **Entry Date:** Enter the date the individual entered the program. (Should be the same date used for Back Date Mode)
         5. Click "Save & Continue"
      ii. Entry Assessment
         1. Ensure that Provider and Entry/Exit Type are correct.
         2. Complete the Assessment. (Some questions will be required before you can save or exit.)
            a. Be sure to complete the Income, Non-Cash Benefits, Health Care, and Disability Sub-Assessments.
         3. Click "Save"
            a. Repeat for each Household Member
               i. After the last member's Entry is complete, Click "Save and Exit"
7. Enter a Service
   a. Click "Service Transactions" Tab (Located NEXT to the Client Information Tab)
      i. Click "Add Multiple Services"
         1. Select Household Members that the service applies to.
         2. Ensure that the Provider is correct. (If need be, select correct Provider.)
         3. **Number of Services:** Enter number of services received.
         4. **Start Date:** Enter the start date of the service.
         5. **End Date:** Enter the end date of the service.
         6. **Service:** Select the service the client received.
         7. **Status of Need**: Select Closed
         8. **Outcome of Need:** Select Fully Met
            a. Click "Save"
               i. If there is another service, Click "Save and Add Another"
                  1. Repeat Steps ii-vii
8. Create an Update/Annual Assessment
   a. Click the "Entry/Exit" Tab (Located under the Client Information Tab)
      i. Click on the "Interim Review Icon" next to the appropriate Entry.
      ii. In the popup click the "Add Interim Review" button.
         1. Select all Household Members that the Entry will apply to.

            2. **Type:** Select either Update or Annual Assessment.
            3. **Review Date:** Enter the date the assessment was completed.
            4. Click “Save & Continue”
        iii. Assessment
            1. Complete the assessment.
                a. Click “Save”
                    i. Complete the assessment for the rest of the Household Members.
                        1. Click “Save & Exit”
                            a. Exit the Interim Review popup screen.

9. Create an Exit
    a. Click “Entry/Exit” Tab (Located under the Client Information Tab)
        i. Click the  next to the Exit Date. **(DO NOT CLICK ADD ENTRY/EXIT)**
        ii. Select all Household Members that were included in the Entry
        iii. Enter the Exit Data
            1. Click “Save & Continue”
                a. The “Entry/Exit Data” screen will appear with the completed Exit Date, Reason for Leaving, and Destination for all members that were selected. Ensure that the data is correct.
                    i. Click “Save”
                        1. Complete the assessment for the rest of the Household Members.
                            a. Click “Save & Exit”
                b. Update any information on the Exit Assessment.
                    i. Click “Save”
                        1. Complete the assessment for the rest of the Household Members.
                            a. Click “Save and Exit”