

## ClientPoint Module

### Entry/Exit Workflow SP5.11 (Individual)

**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, then:

- 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 “Search”

1. Click the  icon from the results list

a. Skip to 3.

###### b. Enter the client’s ID# if known

###### i. Click “Submit”

1. Click the  icon from the results list

a. Skip to 3.

##### 2. Add a New Client

###### a. Enter the client’s First Name, Last Name, and Social Security #

###### i. Click “Search”

1. Click “Add New Client” if not already in the system

a. Select “Add Client Only” (picture of man with green plus sign)

i. Confirm the date/time from the pop-up window. Keep as is, or change if needed.

##### 3. Enter a Release of Information

###### a. Click the “ROI” Tab (located under the Client Information Tab)

###### i. Click “Add ROI”

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.

7. Click “Save ROI”

##### 4. Create an Entry

###### a. Click the “Entry/Exit” Tab (Located under the Client Information Tab)

###### i. Click “Add Entry/Exit”

1. Ensure that the Provider is correct. (If need be, select correct Provider.)

2. **Type:** Select type of Entry/Exit. (All CoC and ESG project will use the HUD Entry/Exit, **ONLY** PATH projects will select the PATH Entry/Exit)


3. **Entry Date:** Enter the date the individual entered the project. (Should be the same date used for Back Date Mode)

4. Click “Save & Continue”

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- 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 and Exit”

**NOTE:** If you need to update or enter a client Name, SSN, DOB, or Veteran Status go to the “Client Profile” tab and click on the pencil to add/edit in this information, you can also add in Client Notes, File Attachments and Incidents.

5. Enter a Service
    - a. Click “Service Transactions” Tab (Located NEXT to the Client Information Tab)
      - i. Click “Add Multiple Services”
        1. Ensure that the Provider is correct. (If need be, select correct Provider.)
        2. **Number of Services:** Enter number of services received.
        3. **Start Date:** Enter the start date of the service.
        4. **End Date:** Enter the end date of the service.
        5. **Service:** Select the service the client received.
        6. **Status of Need:** Select Closed
        7. **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
6. 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. **Type:** Select either Update or Annual Assessment.
      2. **Review Date:** Enter the date the assessment was completed.
        - a. Click “Save & Continue”
    - iii. Assessment
      1. Complete the assessment.
        - a. Click “Save & Exit”
    - iv. Exit the Interim Review popup screen.
2. 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. 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 that were entered. Ensure that the data is correct.
          - i. If the data is correct, Click “Save and Exit”
            1. If the data needs updated, update and “Save and Exit”