



CSIS Creating A Service

Creating a Service

After logging onto the ServicePoint®, select **Enter Data As**, and then choose the program you will serving the client's needs under (if applicable).

Enter Data As Provider Search

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All					
	Provider																											Level	Phone	Location	Last Updated	
		Harvest House - Family Haven Intake (3588)																											Level 2	941-567-6156	Bradenton, FL 34205	10/06/2014
		Family Haven Alliance – Master Case Management																											Level 2	941-492-6384	Venice, FL 34293	10/06/2014

Creating a Service

Click on **ClientPoint** to continue.

The screenshot shows the ServicePoint Training Site dashboard. The left sidebar contains a menu with the following items: Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, and Logout. A red arrow points to the 'ClientPoint' link. The main content area is divided into three sections: System News (27), Agency News (0), and Follow Up List (2). The System News section lists several news items with dates and titles. The Follow Up List section contains a table with columns for Client ID, Type, Date, and Time Remaining. The bottom section of the dashboard shows a Counts Report with Outstanding Incoming Referrals and My Clients.

System News (27)

Date	Headline
03/04/2015	Question regarding the AMI in new Client Profile
01/16/2015	ART 3.1 Has Been Updated as of Friday, January 16th
01/15/2015	Up to Date Training Schedule
12/22/2014	Does the new "Destination" question have you puzzled?
11/24/2014	Video training on REFERRALS now available
10/01/2014	New HUD HMIS Data Standards

Follow Up List (2)

Client ID	Type	Date	Time Remaining
9	Referral	02/04/2015	Past
9	Referral	02/04/2015	Past

Counts Report

Outstanding Incoming Referrals:	My Clients:

CLIENT SEARCH

Type the first few letters of the first and last name of your client. The CSIS will search all of the client records for names that closely match your client. You may need to search more than one way to make certain there is no match. For example, the first name may be Joseph, but it was entered previously as Joe. If you know the Client's Id, you can enter the information in the section below the search fields and then click submit

QUICK HINT:



For many clients the SS# may be a good place to make sure you are looking at the correct client.

Age, race and ethnicity may also be helpful.

ClientPoint > Client Search

Client Search

Please Search the System before adding a New Client.

First Middle Last Suffix

Name: edw [] test []

Name Data Quality: -Select-

Alias: []

Social Security Number: [] - [] - []

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match: ☐

Search ACTIVE Clients: ☒

Search INACTIVE / DELETED Clients: ☐

Search ALL Clients: ☐

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # [] Submit

Client Results

	ID	Name ▲	Social Security Number	Date of Birth
	111111	Edward Tester	000-00-0000	5/21/1961
	119999	Edward Testonell	000-99-9999	8/1/1948



Here's a tip!



If there is a valid “
Universal Release of
Information” recorded.
This ROI covers all
agencies and projects in
our Continuum of Care

Release of Information

An important first step is to verify that the Client has a valid Release of Information on file in the CSIS system.

If they do not have a ROI, you will need to get one signed and add to CSIS system before continuing on.



For most clients you will update or add specific client information as part of the project Entry/Exit, or through ShelterPoint, even if they already have a data file in CSIS.

There are a few projects that provide services only. These project use the Client Profile to add or update

Creating a Service

Select **Service Transactions** tab.

Client - (88469) test, archibald Mass Visibility Update


(88469) test, archibald
Release of Information: **None**

Client Information **Service Transactions**

Summary Client Profile Households ROI Entry / Exit Case Managers Case Plans Measurements Activities Assessments

Added to the system 06/05/2006 12:57 PM

Name	test, archibald	Gender	Male
Date of Birth	01/23/2000 (Age 18)	Primary Race	White (HUD)
Social Security	234-44-2233	Secondary Race	
		U.S. Military Veteran?	No (HUD)




Click **Add Service**.


Client - (120889) Test, Brandon -Switch to Another Household Member- Submit


(120889) Test, Brandon
Release of Information: **None**


Client Information **Service Transactions**


Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services


Add Referrals


Eligibility Search


View Previous Service Transactions


View Shelter Stays


View Entire Service History

Creating a Service

Add Service

▼ **Household Members**

This Client is not a member of any Households.

Service Provider* SVDP Cares -Suncoast Rapid Rehousing (6743) ▼

Creating User Lauren Davis

Start Date* 03 / 28 / 2018 10 : 49 : 46 AM ▼

End Date 03 / 28 / 2018 10 : 49 : 46 AM ▼

Service Type* Case/Care Management (PH-1000) ▼ **Look Up**

Provider Specific Service -Select- ▼

CSIS defaults the Service Provider to the project you entered under. It will also default the Start and End Date to the current day.

Save & Continue Cancel


Select the **Service Type** from the drop down menu. If the Service Type is not listed in the drop down menu, select the **Look Up** button to view all system available Service Types. *Note: You should check with your manager before using this option as, all services may not be available through your agency.* Certain projects may also require a **Provider Specific Service** be selected.

Once Service Type is selected, click to **Save & Continue**



Creating a Service



▼ **Household Members**


This Client is not a member of any Households.

Service Provider *  SVDP Cares -Suncoast Rapid Rehousing (6743)

Creating User Lauren Davis

Start Date * 03 / 29 / 2018   11 : 49 : 12 AM

End Date 03 / 29 / 2018   11 : 49 : 12 AM

Service Type *  Rent Payment Assistance (BH-3800.7000)


Provider Specific Service

Service Notes

Service Costs

Number of Units	<input type="text" value="1"/>
Unit Type	<input type="text" value="Months"/>
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text" value="750.00"/>

► **Apply Funds for Service**

 **Conditional Commitments**

Some projects/agencies require you to track Service Cost and/or Funding.

- Enter the **Number of Units**
- Add **Unit Types**, (i.e. 1 Month's Rent)
- Add the **Total Cost of Units**

Click on the arrow next to **Apply Funds for Service** for Service.

Creating a Service

▼ **Apply Funds for Service**

Distribute as Voucher ☐ Yes ☒ No

Vendor's Client Account Number

Name on Bill

Vendor

Code for Accounting Department

Funding Sources

Source
Client Co-Pay
<input type="button" value="Add Funding Source"/> <input type="button" value="Add Other Contributing Sources"/>

Add Funding Source

Fund Search

Search for Funds by using keywords for Fund Name, Category, or Description.

Search

Show Matching Funds ONLY ☒

Fund Search Results

Fund	Submission Deadline	Remaining Balance
<input checked="" type="checkbox"/> <input type="button" value="Add"/> St Vincent De Paul	N/A	N/A

Showing 1-1 of 1

Funding Sources

Source	Amount
Client Co-Pay	\$ 0.00
▼ <input checked="" type="checkbox"/> St Vincent De Paul	750.00

☒ Save ☒ Submission ☒ Completed








Total: \$750.00

- Select a Vendor from drop down.
- Click **Add Funding Source**.
- Select Funding Source from available options.
- Enter Amount to be provided for service.
- Click **Calculate**.

Creating a Service

Follow-Ups can be scheduled for a Services by, indicate the Date the Follow-Up is to be scheduled and who will be managing that Follow-Up.

Follow Up Information

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  	
Follow Up User	Family Haven Alliance - Master Case Management (3585)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>	
Follow Up Made	<input type="text" value="-Select-"/> ▼		
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  	

Follow Up List (4)			
Client ID	Type	Date	Time Remaining
120889	Referral	07/11/2018	Past
120889	Action Step	07/12/2018	Today
120889	Goal	07/18/2018	6 Days
120889	Service	07/31/2018	19 Days

Scheduled Follow-Ups for Goals, Referrals, Action Steps and Services display on the Home Page Dashboard under the Follow-Up List.


Creating a Service


Adding Support Documentation for the Funds is very useful. The Client's lease, or any other document supporting where the funds are being spent, can be scanned in and attached here!

Support Documentation

Date Added	Name	Description	Type
Add Support Documentation		No matches.	

Follow Up Information

Projected Follow Up Date: / /   

Follow Up User: 

Follow Up Made: 

Completed Follow Up Date: / /   

Need Information

Need Status*: 

Outcome of Need: 

If Need is Not Met, Reason: 

For every Service completed, the Need Information Section must be completed. Indicate the **Need Status** and **Outcome of Need**. After entering or editing this information, **Save & Exit**.

Creating a Service

Services can be viewed on both the Client Summary Page and Service Transaction Tab. Services and Entry/Exits should be reviewed prior to providing any services.

Client Information

Summary | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Activities | Assessments

Added to the system 12/18/2008 09:10 AM

Name	Test, Brandon	Gender	Client doesn't know
Date of Birth	01/01/1998 (Age 20)	Primary Race	White (HUD)
Social Security	123-54-0062	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)

Release of Information

Provider	Permission	Start Date	End Date
Challenge Grant - HP - Turning Points	Yes	02/20/2018	02/20/2023
Mens Inge Program - Salvation Army - Manassas	Yes	01/22/2018	01/22/2019
Access Point - Coordinated Entry - North	Yes	12/22/2017	12/22/2018

Add RC Showing 1-3 of 3

Entry/Exits

Program	Type	Project Start Date	Exit Date
Access Point -			

Client Information | **Service Transactions**

Needs | **Services** | Errals | Shelter Stays | Entire Service History

Previous Services

Select Dates	Start Date	End Date						
-Select-	MM/DD/YYYY	MM/DD/YYYY						
	Service Start Date	Provider of Service	Service Type	User Creating	Funding Sources	Cost of Service	Date Added	
	07/13/2018	Suncoast Partnership to End Homelessness	Emergency Shelter	Brandon Bellows			07/13/2018	
	07/12/2018	Suncoast Partnership to End Homelessness	Case/Care Management	Amiee Barth			07/12/2018	
	07/10/2018	Suncoast Partnership to End Homelessness	Rental Deposit Assistance	Amiee Barth			07/10/2018	
	07/06/2018	TANF - Homeless Prevention - Turning Points	Case/Care Management	Lauren Davis			07/06/2018	
	07/02/2018	QLife - Salvation Army - Sarasota	Rent Payment Assistance	Brandon Bellows			07/02/2018	
	06/28/2018	Suncoast Partnership to End Homelessness	Case/Care Management	Lauren Davis			06/28/2018	
	06/12/2018	Prospect House - Mental Health Community Centers	Meals	Amiee Barth			06/12/2018	
	06/12/2018	Prospect House - Mental Health Community Centers	Mental Health Support Services	Amiee Barth			06/12/2018	
	06/11/2018	Suncoast Partnership to End Homelessness	Rent Payment Assistance	Lauren Davis			06/11/2018	
	05/09/2018	Suncoast Partnership to End Homelessness	Case/Care Management	Amiee Barth			05/09/2018	

Add Service Add Multiple Services Showing 1-10 of 166 First Previous Next Last