

# Create a Provider (Reporting) Group in ServicePoint

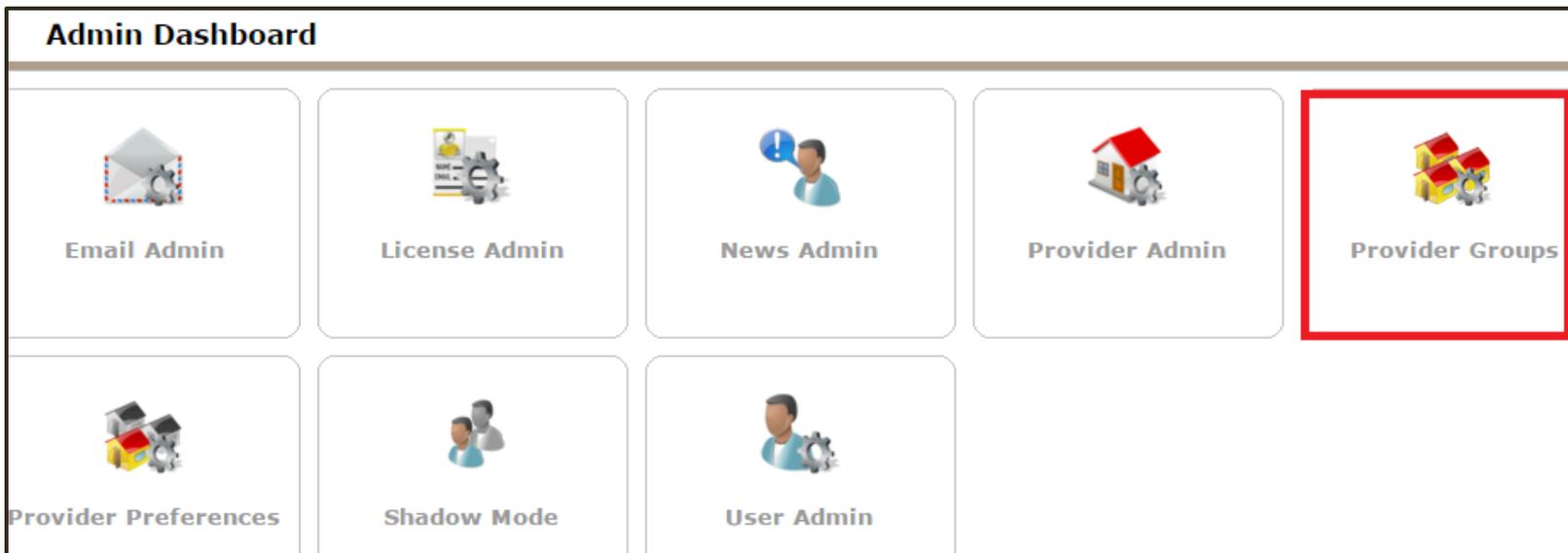
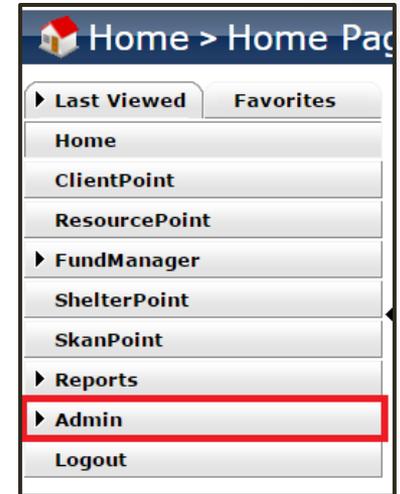


# Overview

- A Provider (Reporting) Group allows users the ability to run a query on multiple providers at once.

# Step 1

- To create a Reporting Group, click on the Admin Module on your Home Page.
- On the Admin Dashboard, click on Provider Groups.



# Step 2

- The Provider Group Admin screen defaults to visibility group so make sure you click on the next tab over – Reporting Groups.

The screenshot displays the SERVICEpoint web application interface. At the top left, the logo reads "SERVICEpoint Connecting Your Community". The main header area shows "NW Social Service Connections" and "ROCC - Rural Oregon Continuum of Care (OR-505)" with a date of "November 01, 2013". On the right, the user "Rena Croucher Agency Admin" is logged in, with a "Mode" dropdown set to "Shadow" and other options like "Enter Data As", "Back Date", and "ART: Connected".

The navigation bar includes "Admin > Provider Group Admin" and a "Type here for Global Search" field. Below this, there are three tabs: "Visibility Groups", "Reporting Groups" (highlighted with a red box), and "Enter Data As Groups".

The "Reporting Groups" tab contains a "Visibility Groups Search" section with the instruction "Search for Visibility Groups by using keywords from their Group name or description." It features a search input field, a "Search" button, a "Clear" button, and a "Create New Group" button.

A left sidebar menu lists "Last Viewed" and "Favorites" sections, with items like Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, and Logout. A "Legal Notices" link is at the bottom left.

# Step 3

- In the Search box, type in what you are going to call the reporting group and then click Search.
- If no results are returned, click on Create New Group.

The screenshot displays the SERVICEpoint web application interface. At the top left, the SERVICEpoint logo is visible with the tagline "Connecting Your Community". The user is logged in as Rena Croucher, Agency Admin. The main header shows "NW Social Service Connections" and "ROCC - Rural Oregon Continuum of Care (OR-505)" with a date of January 09, 2014. The user's mode is set to "Shadow".

The navigation menu on the left includes "Last Viewed" and "Favorites" sections. Under "Last Viewed", there are links for Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, and Logout. Under "Favorites", there are no items listed.

The main content area is titled "Admin > Provider Group Admin" and features a "Type here for Global Search" input field. Below this, there are three tabs: "Visibility Groups", "Reporting Groups" (which is selected), and "Enter Data As Groups".

The "Reporting Groups" tab contains a "Reporting Groups Search" section. It includes a search instruction: "Search for Reporting Groups by using keywords from their Group name or description." Below this is a search input field containing the text "MCCAC ESG2013". To the right of the input field are three buttons: "Search", "Clear", and "Create New Group".

At the bottom of the page, there is a "Legal Notices" link.

# Step 4

- Fill in the Group Name – please include your agency name along with the type of report.
- Once the information is input, click on Save (not Save and Exit).
- **Please note:** To ensure that the Provider Group is visible to all users in your agency, make sure that you have affiliated the Provider Group with the correct Provider Access. For example, if a user creates a Provider Group that lists ROCC as the Provider Access, a user in an agency under the ROCC data tree would not be able to see it.

The screenshot displays the SERVICEpoint web application interface. The top navigation bar shows the user is logged in as Rena Croucher, Agency Admin. The main content area is titled 'NW Social Service Connections' and shows the current page is 'ROCC - Rural Oregon Continuum of Care (OR-505)' with a date of January 09, 2014. The breadcrumb trail indicates the user is in 'Admin > Provider Group Admin > Add/Edit Reporting Group'. The 'Reporting Group Profile' form is the central focus, with the following fields and values:

Field	Value
Group Name *	MCCAC ESGP2013
Description *	
Provider Access	ROCC - Rural Oregon Continuum of Care (OR-505) (3339)

Buttons for 'Search', 'My Provider', 'Clear', 'Save', 'Save & Exit', and 'Exit' are visible at the bottom of the form. The 'Save' button is highlighted with a red box.

# Step 5

- Click on Manage Providers in the Reporting Group Profile to add Providers to your reporting group.

The screenshot shows the SERVICEpoint web application interface. The top navigation bar includes the SERVICEpoint logo and the user name 'Rena Croucher, Agency Admin'. The main content area is titled 'NW Social Service Connections' and 'ROCC - Rural Oregon Continuum of Care (OR-505)'. The breadcrumb trail is 'Admin > Provider Group Admin > Add/Edit Reporting Group'. The left sidebar contains a navigation menu with options like Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, and Logout. The main content area is divided into two sections: 'Reporting Group Profile' and 'Reporting Group Providers'. The 'Reporting Group Profile' section shows the 'Group Name' as 'MCCAC ESGP2013' and 'Description' as an empty text area. The 'Provider Access' is listed as 'ROCC - Rural Oregon Continuum of Care (OR-505) (3339)'. The 'Reporting Group Providers' section features a table with columns for 'Provider ID', 'Name', and 'Last Updated'. The table is currently empty, displaying 'No matches.' A red box highlights the 'Manage Providers' button in the table. Below the table is a 'Copy From Existing Group' button and a section for 'ZIP Codes in this Reporting Group's Jurisdiction'.





# Final Note

- Once a Reporting Group has been created, it can be edited at any time.
- Simply repeat Steps 1 and 2 and do a search to find your Reporting Group. You can then follow the instructions in Step 5 to add or remove any Providers that you need to.