



# SERVICEPOINT NEW USER BASIC WORK FLOW

1. Client Search – use existing record if found, or Add New Client with This Information (Don't forget to add data elements, like US Veteran). Always start with the Head of Household
2. Add New Household – include all household members, adjust Joined Household date as needed.
3. Add Release of Information – ensure data sharing too participating agencies. At least one ROI with your “agency” is needed. Start and End Dates must be accurate.
4. Add Entry – **Provider, Type and Project Start Date are essential to your reports.** Ensure ALL household members are checked, if needed.  
*\*This is your baseline measurement*
5. Service Transaction for Rent Assistance money spent – New step showing OHCS Fund Allocations by “Add Fund Source”. Use Add Service
6. Interim Review/Annual Assessment – *if needed*, update information as it changes through time. (Ex. Housing Move-in Date, Health Insurance, Income, Address, etc.)  
*\*Did the baseline measurement change?*
7. Exit – **Exit Date and Destination are essential to your reports.** Ensure all household members are checked, if needed.  
*\*This is your final measurement. Any additional change in information?*
8. Retention/Follow-up for households exiting into a Permanent Destination – Complete a follow-up 6-months from the exit date. Run the ART report to get your list of who is due. Use the Follow-up Icon on the Entry/Exit tab.

## QUESTIONS??