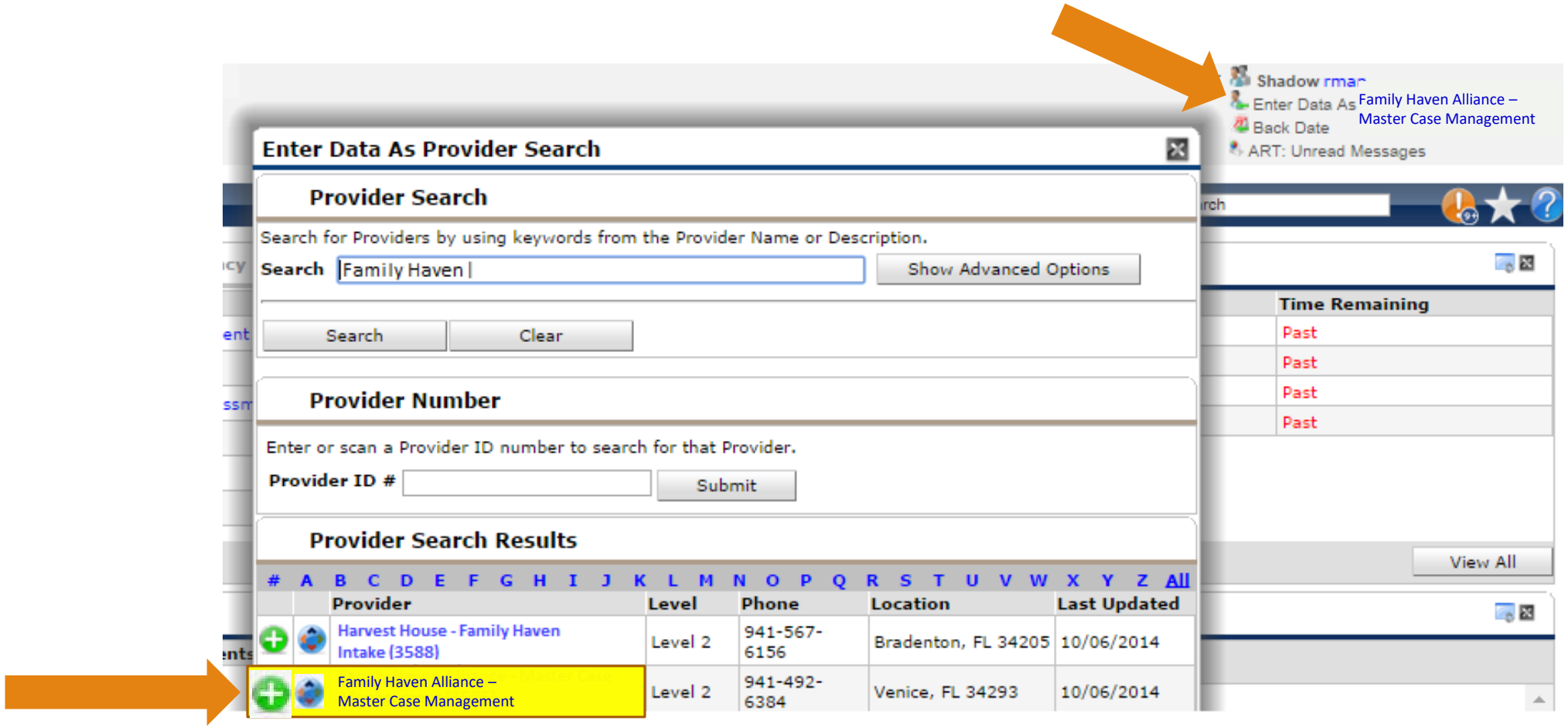
CSIS Creating A Service

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).



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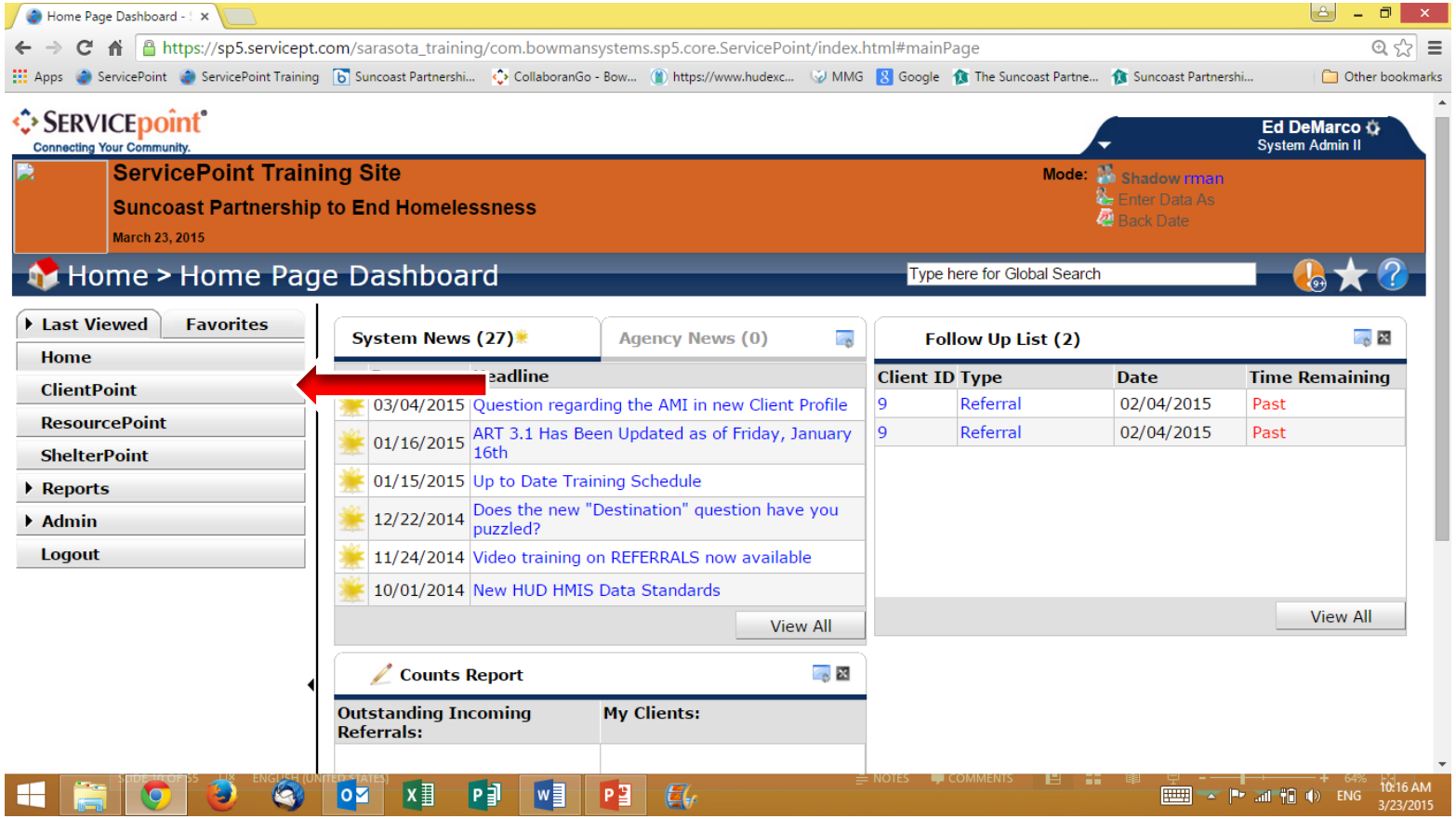
Click on **ClientPoint** to continue.



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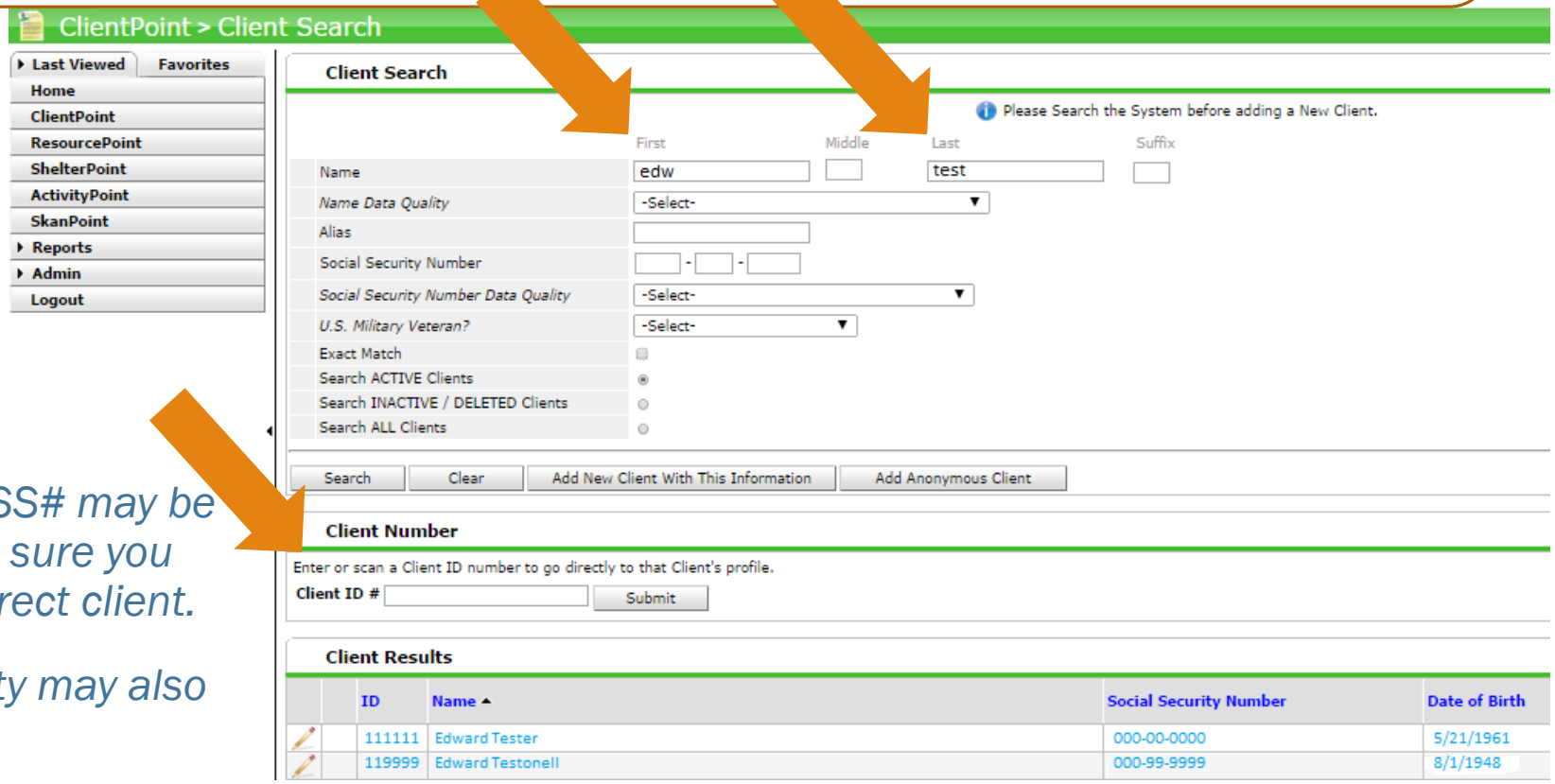
CLIENT SEARCH

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.

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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.

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

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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

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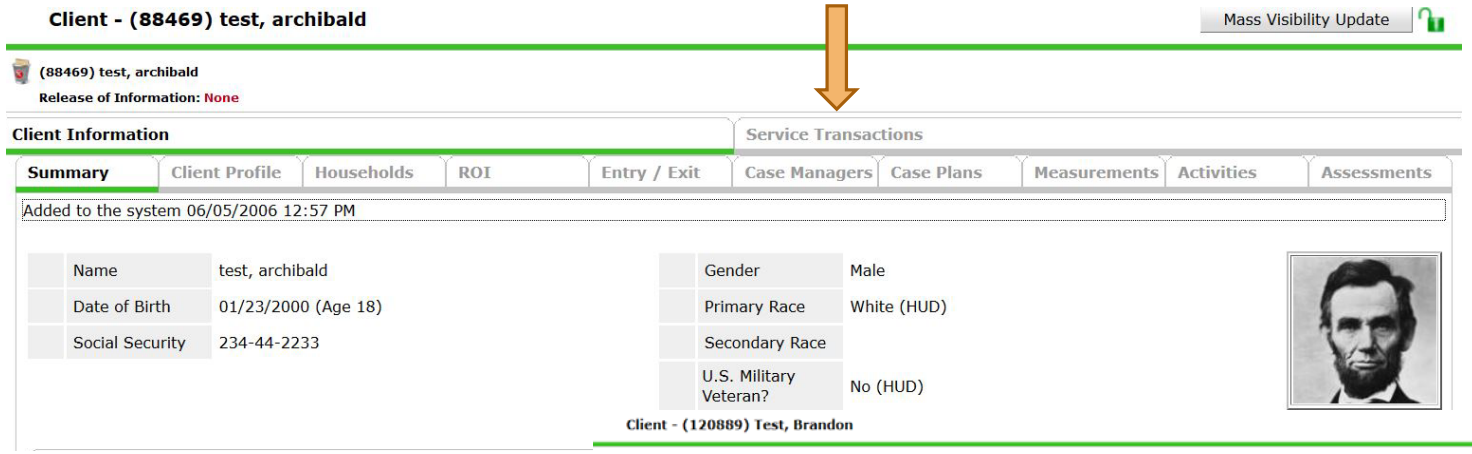
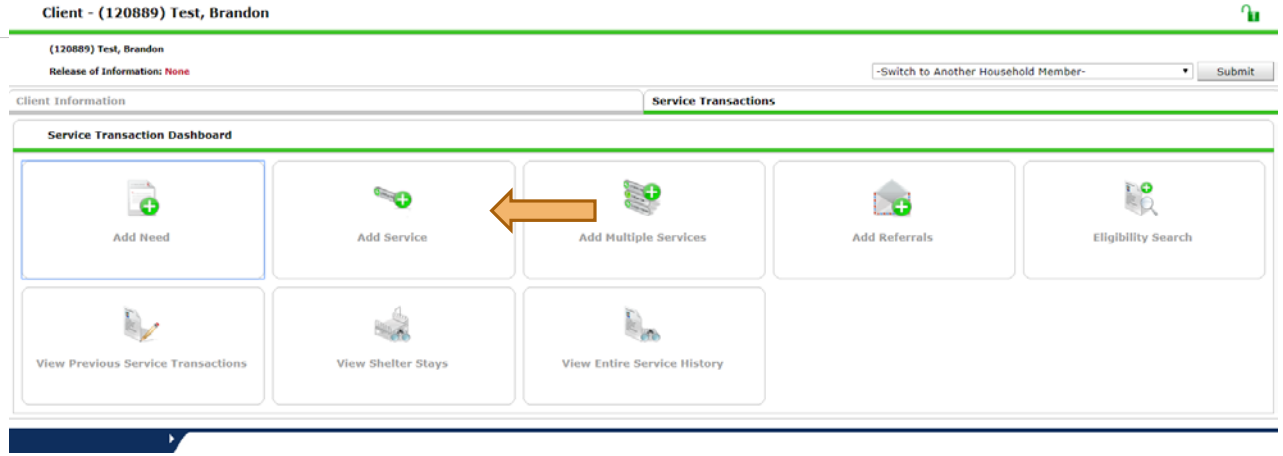
Select **Service Transactions** tab.



Click **Add Service.**



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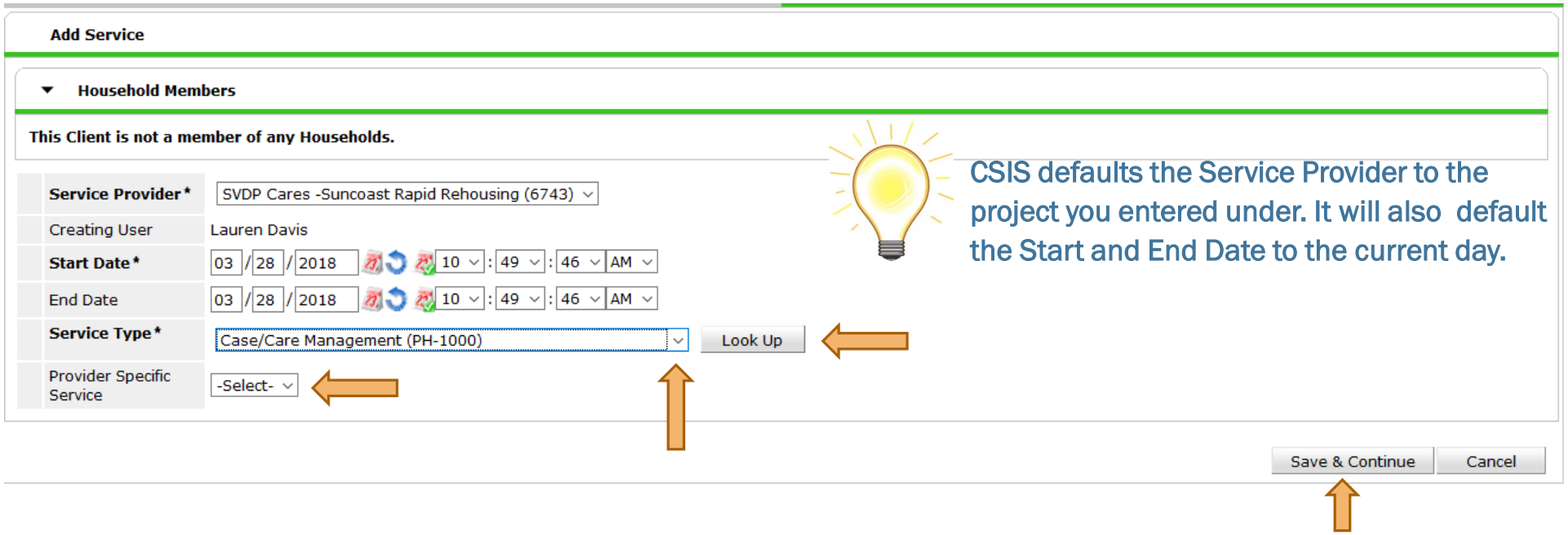

Select the **Service Type** from the drop down menu. If the Service Type is not listed in the drop down menu, select the **Look Up** button to view all system available Service Types. *Note: You should check with your manager before using this option as, all services may not be available through your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

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

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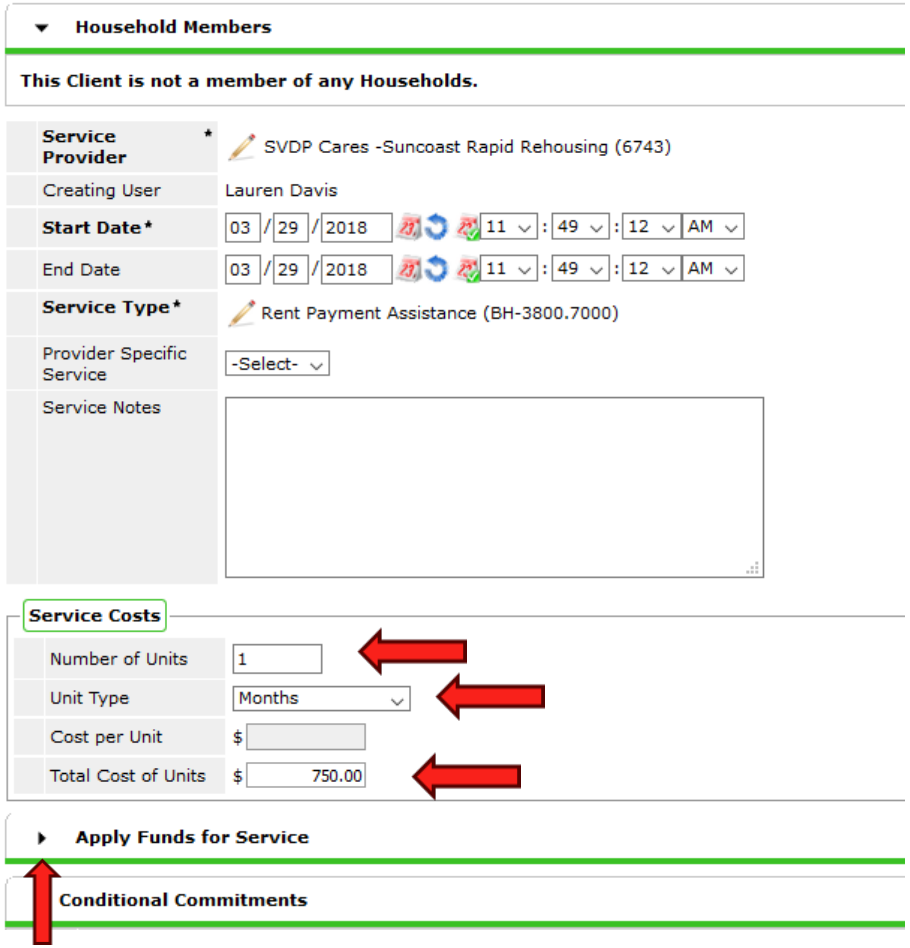

Some projects/agencies require you to track Service Cost and/or Funding.

- 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.

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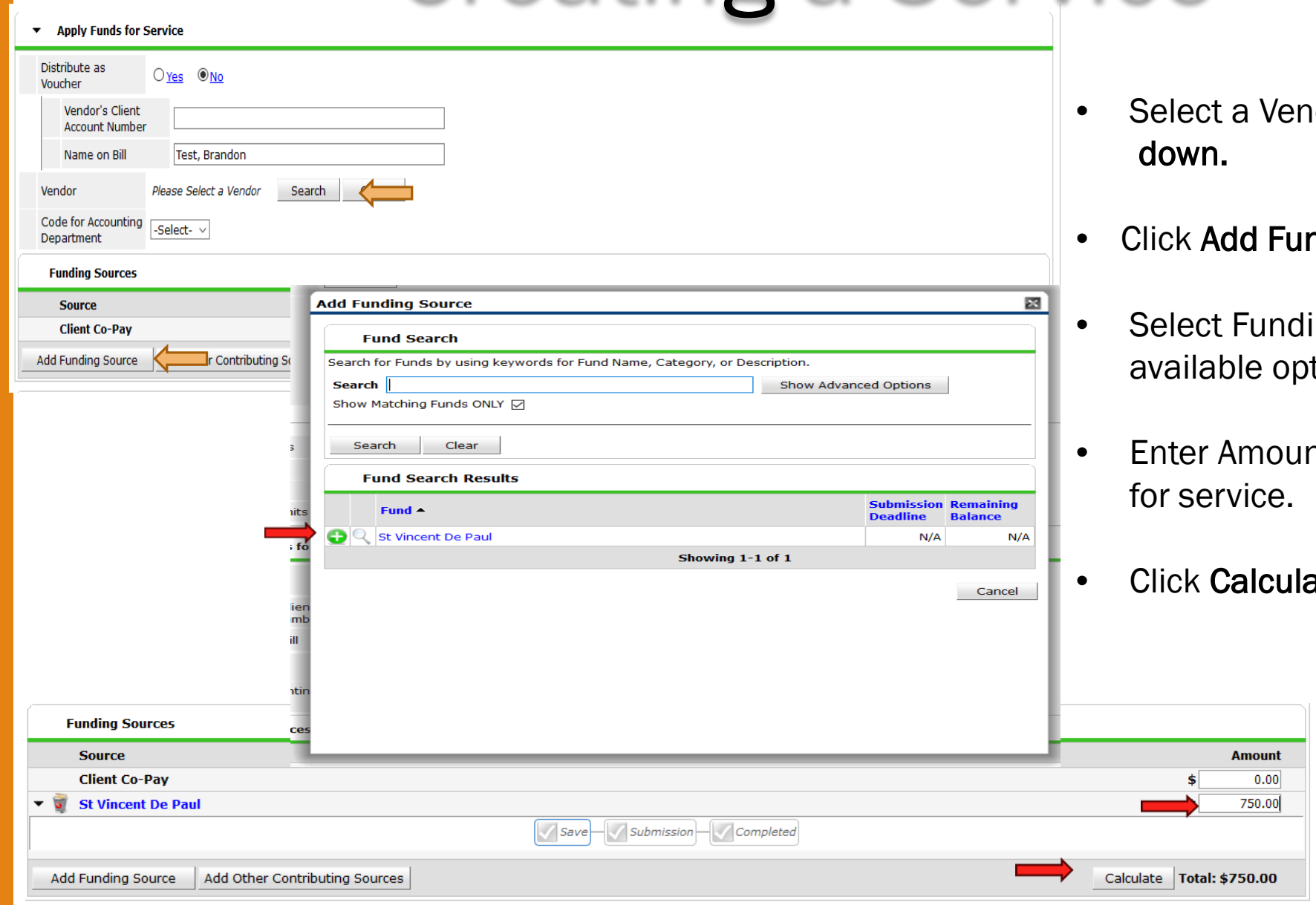

- Select a Vendor from drop **down.**
- Click **Add Funding Source.**
- Select Funding Source from available options.
- Enter Amount to be provided for service.
- Click **Calculate.**

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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	/ /
Follow Up User	Family Haven Alliance - Master Case Management (3585) Search My Provider Clear
Follow Up Made	-Select-
Completed Follow Up Date	/ /

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.

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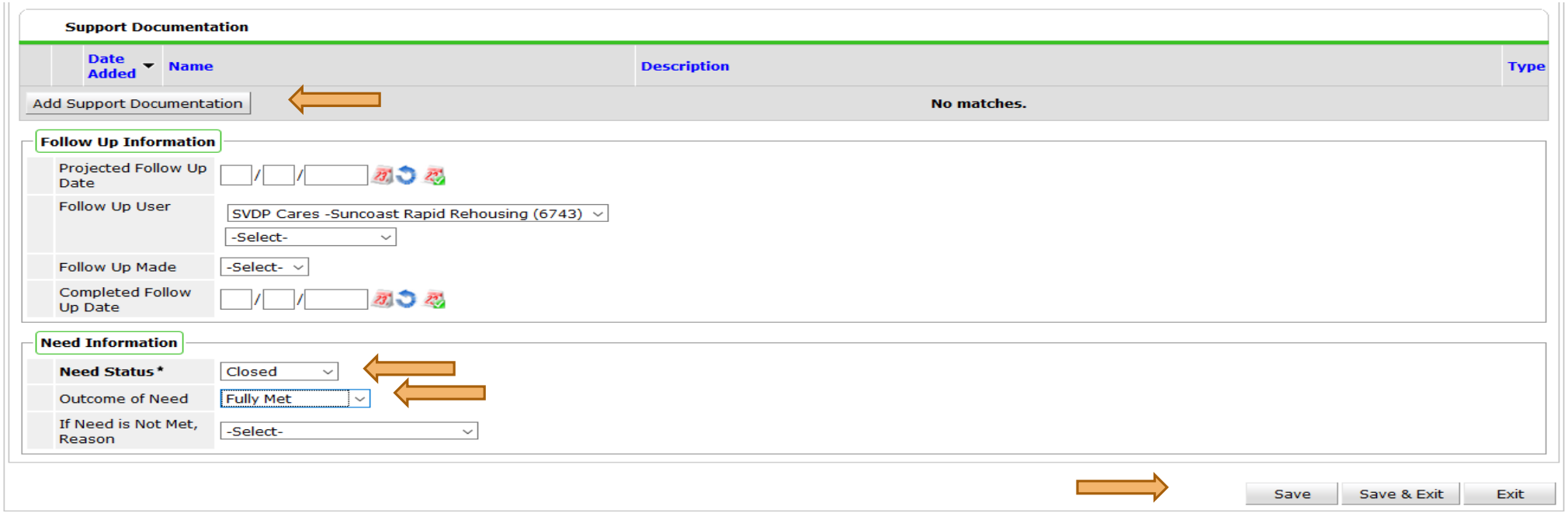
Adding Support Documentation for the Funds is very useful. The Client's lease, or any other document supporting where the funds are being spent, can be scanned in and attached here!



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**.

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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 | Service Transactions

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 Lodge Program - Salvation Army - Mana	Yes	01/22/2018	01/22/2019
Access Point - Coordinated Entry - North	Yes	12/22/2017	12/22/2018

Add RO | Showing 1-3 of 3

Entry/Exits

Program	Type	Project Start Date	Exit Date
Access Point -			

Services

Start Date	End Date	Provider
07/13/2018	07/13/2018	Suncoast Partnership to End Homelessness
07/12/2018	07/12/2018	Suncoast Partnership to End Homelessness
07/10/2018	07/10/2018	Suncoast Partnership to End Homelessness
07/06/2018	07/06/2018	TANF - Homeless Prevention - Turning Points
07/02/2018		QLife - Salvation Army - Sarasota

Client Information | Service Transactions

Needs | Services | Referrals | Shelter Stays | Entire Service History

Previous Services

Select Dates: -Select- | Start Date: / / | End Date: / / | Search

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

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