

TalkingPoint

VOLUME 3

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DEPARTMENT OF COUNTY HUMAN SERVICES
SUN SERVICE SYSTEM & COMMUNITY SERVICES

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**MULTNOMAH
COUNTY**

Service Transactions

by Sherry Yan



Please remember that Multnomah County programs may have a different data entry method than others, such as the City of Portland. Please ensure that you are entering service transactions for each program correctly.

Multnomah County will be looking more closely at service transactions and how they are entered into ServicePoint as a part of this year's data quality. Please ensure that you are entering your service transactions correctly.

MONTHLY ENTRY

When entering service transactions into ServicePoint, you can enter all services for each month together for most programs once a month (or if desired, enter data each time a service is delivered). For example, if you saw a client twice in November for case management (once for three hours and once for one and a half hours) then you could put that client's November services as 4.5 hours. Just put down the start date for services as the last day of the month, so 11/30/10. Remember, the end date for services is always blank when entering data in this manner.

DATES

Everything in ServicePoint is time and date stamped. Therefore it is important that your dates in ServicePoint are correct if you want your data

to be reported properly and ensure that we are counting all the clients that you serve. The service date needs to be after the entry date.

If you forget to create an entry and enter services for a client, this client will not be counted as a client you are serving. If you realize you have forgotten to create an entry for a client, please remember to change the entry date for the date the client entered the program, not the prefilled date—the day you create the entry. This can also cause a client to not be counted properly.

No programs at Multnomah County require services to be provided after exit from a program. Some programs do require a periodic follow up. A follow-up itself is not considered a service. However, in the course of a follow up, if you provide a service, then that can be recorded in ServicePoint if desired. One time services do not need a new entry. If you are going to provide more ongoing services after exit, the client will need another entry into your program, otherwise, they will not be counted in your outcomes report as having been served.

SERVICE DATA

Service data includes the case manager who provided the service, what type of service was provided and the number of units. Multnomah County does not track funding sources entered in ServicePoint service transactions. If you would like a screen shot of data to enter, email the [helpline](#).

SERVICE STAFF

When entering services, please select the name of the person who is providing the

service in the service staff drop-down list. Names are added to the list when supervisors request licenses for new staff. If you do not see your name on the list (or the name you need to enter if you are doing data entry), please have your supervisor email the helpline and we will gladly make the necessary change.

If the service staff list is outdated and there are many people listed who no longer work in your program or at your agency, please have your supervisor email the helpline and we will gladly remove the names of anyone no longer providing services to your project's clients.

The list of service staff is not a list of those who have ServicePoint licenses, but rather it is the list supplied by the agency of who is providing services to clients.

PROVIDER SPECIFIC SERVICE

Answering this question is essential for your client to count as a client who is being served in your outcomes report. Even if you indicate the amount of time you spend in a service transaction, it will not be counted as a service unless you specify what kind of service. Examples of options in the pull down list include case management, skill building, and client assistance. Each program has its own list of provider specific services. Please make sure you select a type of service from the pull down list.

UNITS

It's a little hidden, but don't forget to enter the units of service and the unit type—basically how much time (or money) did you spend with (or on) this client. Don't forget to enter it!

Helpful Reminders

By Sherry Yan

HOUSEHOLDS



The first step to creating a new client is to create their household—family members or others that live with the client.

First, you must indicate whether the client is the head of household. There should only be one head of household designated for each household.

You must then identify what the client's relationship is to the head of household. Please remember that this is not the relationship to one another within the household (i.e. the father or mother of the children and the sons and daughters). Rather it is the relationship of each household member to the head of household. When you select 'Mother', you are not putting down that it is the mother of the children in the family, but rather that this person is the mother to the head of the household.

CREATE AN ENTRY

The entry in the entry/exit screen is not only how you record your client's demographic information, but how we know that this client is enrolled in your program.

Every client needs to have an entry. Clients who do not have an entry will not show up on Outcomes reports.

DOUBLE CHECK YOUR DATA WHEN EXITING A CLIENT



When you are entering client exit data from ServicePoint, it's a great time to double check all the data for that client. Simply click on the pencil next to the entry date to view the entry data and verify that you have answered all the questions for each client at entry. It is a lot easier to call a client at this point if you forgot to ask a question than 6 months later.

Also click on the service transaction tab to make sure that you have entered all the services this client participated in. Make sure all your client interactions are recorded.

Upcoming office closures

By Sherry Yan



There are several upcoming office closures in the next month.

We will be closed on the following days:

- Friday December 31st 2010
- Monday January 17th 2011
- Monday February 21st 2011

Please also note that there may be some delays with the upcoming seasonal office closures. If you have any reporting needs, please allow ample time for processing when you submit your request.

Please feel free to email the helpline and we will respond promptly once our offices open: ServicePoint@multco.us.

Dear Dorothy

Dear Dorothy,

My program now has two different providers in ServicePoint. One just includes my program's name, and the other is my program's name plus ShelterPoint (or Transitional Housing, HSG Nights, etc.) Can I just exit my client from one of the two providers, or do I need to exit my client from both providers—the main program as well as the ShelterPoint provider?

Do I Stay or Do I Go Now

Data Helpline

503-970-4408

Fax

503-988-3332

Email:

ServicePoint@multco.us

Dear Stay or Go,

Nothing has changed in terms of doing an Entry and an Exit in the main provider—that is still where entry demographics, non-housing services, and program outcomes are entered. However, instead of recording housing services in the main providers' Service Transactions, you are now expected to record them in the new ShelterPoint provider. But instead of entering an Entry and Exit Date, you enter the Date In and Date Out of housing. The ShelterPoint Date Out should be on or before the Exit Date in the main provider.

When your client leaves housing, and you assign them a Date Out in ShelterPoint, they are exited only from the housing portion of the program. If they continue to participate in other services (like case management), they should not be exited from the main provider until they have completed services. Remember to exit any family members who are in the client's household.



Work Sessions



In order to assist you with meeting your data entry deadlines, Multnomah County introduced Work Sessions. These Work Sessions are an opportunity to review best practices, receive an ART refresher, or just have a member of the data team enter your data alongside you!

Remember, Work Sessions are all morning on the second Monday of the month, and

are on a first come first serve basis. Time spent with you may be limited due to demand.

The next Work Session is on **Monday January 10th** from 9AM-12PM in our computer lab at 421 SW Oak St. Just check in at the reception desk in the Department of County Human Services on the first floor. See you then!

ServicePoint Training and Assistance

New User Training

You will always find the ServicePoint Training Calendar on our website:

<http://web.multco.us/sun/servicepoint>.

Our next scheduled ServicePoint New User Classes are **Friday Jan. 14th and Friday Jan. 28th**. Be sure to sign up before the classes fill.

Please contact us to sign-up or schedule alternative times.

Data Entry Refresher and Help

If you have already had ServicePoint training, but are still having trouble getting data entry done, call us. A Data Management Team member can often come to work with you at your location, assisting with data entry, as well as helping you to become more comfortable with ServicePoint.

Custom Classes

If several staff from your agency would like to be trained together, call us. We can often schedule a customized class at your convenience.



ServicePoint Mind Tickler

Email the correct answers (both the Pop Quiz and the Fill In the Blank) by Monday January 10th to be entered in a lottery to win a **\$5 gift card to Starbucks**. Email ServicePoint@multco.us for your chance to win. Give it a try and get your coffee (or tea or hot chocolate) buzz on!!! All the answers can be found in each of the articles in this newsletter.

Pop Quiz

1. What is the start date for service transactions when entering cumulative services for the month?
2. ShelterPoint enters and exits a client into what type of service and records this same type of service?
3. What are three fields that need to be answered when entering service transactions?

Fill In the Blank (You will find these sentences in articles contained in this newsletter)

There should only be one head of household designated for each household.

1. There should only be ____ head of household designated for each household.
2. Clients who do not have an ____ will not show up on Outcomes reports.
3. The list of service staff is not a list of those who _____, but rather it is the list supplied by the agency of who is providing _____.



Visit us on the Web for **Forms, Training Calendar, Manuals, Updates** and more!

<http://www.co.multnomah.or.us/servicepoint>