VOLUME 3

ISSUE 2

TalkingPoint

DEPARTMENT OF COUNTY HUMAN SERVICES
SUN SERVICE SYSTEM & COMMUNITY SERVICES

Cleanest Data Ever!

by Sherry Yan

The deadline has passed for end of year data entry. Now it's off to a fresh start for Fiscal Year 2011! The deadline to enter data for any given month is the 15th of the following month, therefore July 2010 data should have been entered by August 15th, 2010.

Now onto the good stuff—

Your end of year data has NEVER looked better! FY10 has the most complete data of any previous year. Great Job Everyone!!! You're AMAZING!

We ***thank you*** for all of your hard work last year. Please give yourselves a pat on the back.

Keep up the great work!
Let's all strive to say the same thing at the end of FY11!

New Year, New Data

by Sherry Yan

It's a new annual year and we will have new data—so it's a clean slate for us all.

Let's all make sure that FY11 is the best year for data ever! We'll review some essentials and best practices to help you make FY11 an astounding success.

CLIENT LISTS

One of the most important pieces of tracking data entry and possible errors or irregularities in reporting is keeping your own client list.

Most of us have had the experience where if we didn't enter a client in just the right way, he or she didn't show up on the ART report or sometimes even in ServicePoint.

If you want each and every client to be counted, be sure to keep a client list separate from ServicePoint. It can be a simple Excel spreadsheet or Word document that has the client name, ServicePoint ID and

perhaps their entry/exit dates or other pertinent information (i.e. whether they are a group client or a case management client or whether they need a follow-up). ART reports can be run at your agency quarterly (or as often as you would like) to ensure that all your clients are being counted both on your caseload and in your outcomes report.

Don't wait until the end of the year to run your reports. If you don't know which clients aren't showing up on reports, then we won't know either! However, if you have kept a client list, you can compare the names on the report to your own client list to figure out what is going on and fix it. If you think you've served more but don't know how many and don't know who they are, we won't know either.

INTAKE AND DATA ENTRY FORMS

Many agencies have intake forms that they prefer to use. Individual agencies have individual needs and thus we encourage the use of whatever forms that are most useful to collect both data that meets your agency requirements and ServicePoint data entry. However, we have noticed that many agency forms do not have all of the ServicePoint questions listed. In these cases when staff enter their ServicePoint data they may not know the answer and thus will have incomplete data. If your agency is moving towards centralized data entry, and you have a dedicated data entry person who enters data for all the case managers and service staff, make sure your own intake forms are up to date!

If you would like assistance creating forms, call or email the ServicePoint staff and we will be happy to help you create individual forms for your agency.

Inside This Issue

DCHS SP Data Team
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Kathy Knapp
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Sherry Yan
Peggy Samolinski

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MULTNOMAH COUNTY

ServicePoint Superstar

We have selected the all of the PCDS (Parent Child Development Services) program staff as the ServicePoint Superstar for August. You can find a PCDS provider at Albina Head Start, Catholic Charities, IRCO, Mt Hood Community College, NARA, Neighborhood House and Impact Northwest.

The PCDS staff have worked diligently to improve their data quality. For Fiscal Year 2010, they were only missing 172 out of a total of 27592 data elements (less than 0.5% of their data). They have worked with their program development specialist to shape their outcomes to best reflect their program's work.

We would like to give a special shout-out to **Hui-Ling Wu** at IRCO for working with her department to ensure ServicePoint excellence!

If you know of someone who should be the next ServicePoint Superstar, please tell us!

What Makes a ServicePoint Superstar?

- Meeting deadlines for data entry and clean up.
- Using resources wisely: reading the manual and emailing or calling the ServicePoint Helpline when questions arise.
- Asking questions, offering suggestions, providing constructive comments.
- Having a positive attitude about ServicePoint, and encouraging the same in others!

ServicePoint Training and Assistance

New User Training

You will always find the ServicePoint Training Calendar on our website: www.co.multnomah.or.us/servicepoint

Our next scheduled ServicePoint New User Classes are **Friday Sept. 10th and Friday Sept. 24th.** 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, getting data entry done, 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

Be the first one to email all the correct answers to ServicePoint@co.multnomah.or.us and win a **$5 gift card to Starbucks**. Give it a try and get your coffee (or tea) buzz on!!! All the answers can be found in each of the articles in this newsletter.

Pop Quiz

1. If a client has not received services since April 2010 and they are still open now in August, what should the exit date be?
2. Who needs a ServicePoint ROI?
3. Name three things mentioned that you might include on your client list that you keep outside of ServicePoint.

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

1. If you searched for him under the first name "Har", then you will pick up both _____ and ______—however you will also pick up names like _____, which have "har" in them.
2. Everyone only needs ____ entry at a time for each program they are enrolled in.
3. Remember to keep in mind that entry information ____ ____ ____. It is a snapshot of what that person looks like on ____ ____ ____.

Visit us on the Web for **Forms, Training Calendar, Manuals, Updates** and more!
http://www.co.multnomah.or.us/servicepoint

How To . . .

by Sherry Yan

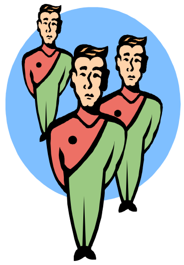
SEARCH FOR CLIENTS (AND AVOID DUPLICATES)

How is it that you have two Harold Lees or enrolled the wrong Harold Lee? What often happens is that Harold is enrolled in another program at your agency and you did not search properly to see if he was already enrolled into ServicePoint. ServicePoint searches for names phonetically. That means if you type in Harold Lee, it will search for names that sound like Harold Lee.

You do not have to enter the entire name to do a search, ServicePoint will search the combination of letters you enter anywhere in that field. This often helps you search more thoroughly. For example, perhaps Harold goes by Harry sometimes and his previous case manager entered him as Harry. If you searched for him under the first name “Har”, then you will pick up both Harry and Harold—however you will also pick up names like Shari, which have “har” in them. I like to search for Harold Lee as Har L.

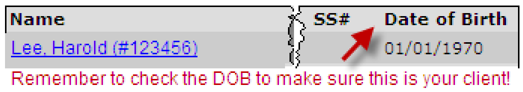
Another common mistake is that someone entered Harold as his last name and Lee as his first name. A search for Harold Lee will not find Lee Harold.

Also, remember that there just MAY be TWO Harold Lees (and even a guy named “Harold Lees”). Remember to



Remember:

- Harold≠Harry
- Harold Lee≠Lee Harold

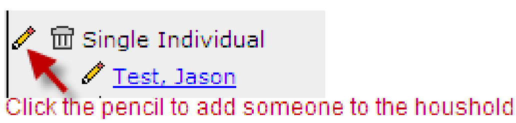


check his Date of Birth before enrolling him into your program. Maybe Harold Lee is a popular name in the community, or maybe Harold has a son named Harold Lee. Check the date of birth next to the name in the search results to confirm that this is the client you work with.

ADD SOMEONE TO AN ENTRY

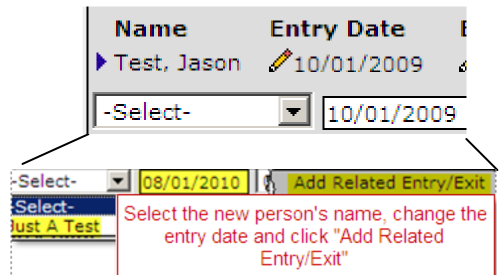
Have you had someone join a household that you are serving or had someone in the household that wanted to participate in services after you enrolled them?

Just add them to the household if they are not already in ServicePoint. Click on the pencil next to the household type to add someone to Jason Test’s household:



A window will pop up allowing you to add a new client into ServicePoint. Don’t forget to search to make sure they’re not already in ServicePoint before adding them.

Now go into Jason’s entry in the entry exit screen. Below his name at the top of the page, you will see a pull down menu. Select the name of the new member of the household, in this case Just A Test. Let’s say Just started participating in programming on August 1st, so we change the date (which defaults to the day Jason entered programming) to 08/01/10 and click the “Add Related Entry/Exit” Button.



Now simply click on the pencil after Just’s name and start entering his demographic information!

Remember—Clients should only have ONE entry at a time for each program they are enrolled in. If someone has an entry and no exit date for your program this means they have an active entry—they DO NOT need another one. On any given day, a person has only ONE open entry per program.

To Enter Or Not To Enter. . . And When to Exit *By Sherry Yan*

The question often arises: Should I enter my client into ServicePoint? If you are providing services or the client is attending activities, then he or she should be entered into ServicePoint. If a client walks in and you meet with her/him and don’t return for other services, then you may not want to enter them into ServicePoint. For example, you meet with Cindy Kim and sit down and conduct an intake with her on 8/1/10. However when you call Cindy to work on her case plan the next day or next week, she never returns your call—then you may not want to enter her into ServicePoint as you have not provided her with any services beyond that first intake.

Let’s say that Cindy does call you back and you work with her on her case plan or maybe she attends activities at your SUN school and you create an entry for her. Remember that she will need an entry **before** you start entering services for her. Also remember that the default entry date is the date that you enter data, so you need to change it to her actual entry date. If you do not change the entry date and realize that Cindy’s entry date is after her service start, she may not show up on ART reports properly and you will need to change it and all her demographic info will be gone.

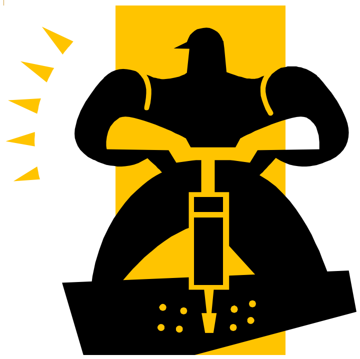
All data entered into ServicePoint is time and date stamped. If you enter Cindy into ServicePoint on 9/10/10 and forget to change her entry date to 8/1/10 and leave it on the default of 9/10, then ServicePoint knows that Cindy was born on 12/7/1947 on 09/10/10; however if you realize later that you left her entry date as 09/10/10 and you simply change the date to 08/01/10 and hit save, ServicePoint will show you a blank entry—because on August 1st ServicePoint had no idea what Cindy’s date of birth is, it only knows what it is from Sept 10th onwards. You don’t want to get stuck re-entering her data!

Remember to keep in mind that entry information **does not change**. It is a snapshot of what that person looks like on that particular day. Any changes should be reflected in the exit questions.

Finally, if your client has not received services in a couple of months, s/he should be exited and they should be exited at the end of the last month they received services. If it’s December and you haven’t heard from Cindy in three months, it’s time to exit her with an exit date of September 30th.

*Remember clients from Fiscal Year 10 (ending June 30, 2010) who do not receive services in FY11 should have an exit date 06/30/10

Work Sessions

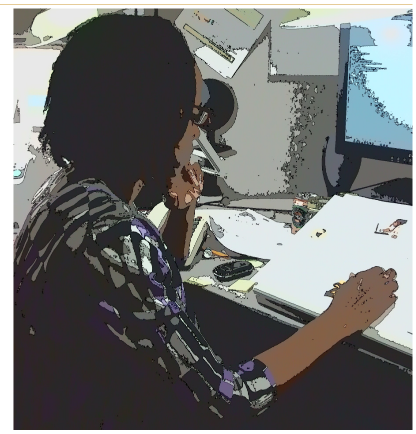


In order to assist you with meeting your data entry deadlines Multnomah County introduced Work Sessions. These Work Sessions are an opportunity to review best practices, receive an ART refresher or simply to have a member of the data team enter your data alongside you!

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 September 13th 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!

Dear Dorothy



Dear Dorothy,

I'm a SUN Site Manager and because it's the end of the year I thought I could delete my activities from this past year. But now I need to run reports that include those activities and they are not showing up. How can I get those activities that I deleted to show up again?

Sincerely,
Danny Deleter

Dear Danny,
Well, I'm sorry to tell you that once an activity has been deleted, we have no way of retrieving it. In order to report on that activity, you will have to re-create it in ServicePoint, including the enrollment and attendance. This is a good reminder for all ServicePoint users: if you are not sure about what you are doing (especially deleting anything!), please email or call the HelpLine (503-970-4408 or servicpoint@co.multnomah.or.us) for assistance. We are here to help! Please do not delete any activities unless they are a duplicate or incorrect date! You never know when you might need it.

Dear Dorothy,

Why, when I run the SUN Quarterly Progress Summary report, does the report show "Adults Served in Enrolled Extended-Day Activities"? Why does this happen when I'm not serving adults?
Not Yet An Adult

Dear Not Yet,
This is usually caused by entering the wrong date of birth, or you may have students who are 19 years of age. If so these students will show up in our ART reports as an adult. The SUN Quarterly report counts anyone 19 or older as an adult. Remember if an ART report is showing any discrepancy between what you believe the report shows and what you believe it should show, look at the activity or client in ServicePoint as well as what the ART report shows.

Dear Dorothy,

My client has refused to sign a release of information.
Does this mean that I should not add an ROI in ServicePoint or write 'no'?
Dataless in Portland

Dear Dataless,
A ServicePoint ROI is a little bit of a misnomer. It is not a release to share information with other agencies or individuals. Rather, the ServicePoint ROI simply allows other users in your provider group (your supervisor and co-workers) to view that client's data and so that the data pulls correctly for reports. Everyone needs a ServicePoint release of information, so the answer should be yes. Again, it is not a release to share the client's data with anyone, but simply allows others in your program access to it.

Data Helpline	Fax
503-970-4408	503-988-3332

Email:
ServicePoint@co.multnomah.or.us

Got a question for Dorothy? Send it to ServicePoint@co.multnomah.or.us.