

TalkingPoint

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DEPARTMENT OF COUNTY HUMAN SERVICES
SUN SERVICE SYSTEM & COMMUNITY SERVICES

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MULTNOMAH
COUNTY

End of Year Reporting by Sherry Yan

It's that time of year. . . The end of the fiscal year—and there is a lot on your mind.

Don't get caught unaware of end of year data requirements!

DATA QUALITY REPORTS

Did you forget to ask your client how long they lived at their previous address and left that question blank? Or maybe you didn't have a student's eSIS number when you enrolled them. Or your client didn't know the highest grade completed by his girlfriend. It's now the end of the year and you don't remember what information you entered and what you didn't. How do you find out what data you are missing? Run the **Data Quality** report in ART. It can be found in the Multnomah County folder in Data Quality in DQP_FY10. This report will list clients with missing demographic information.

NO SERVICE IN 90 DAYS

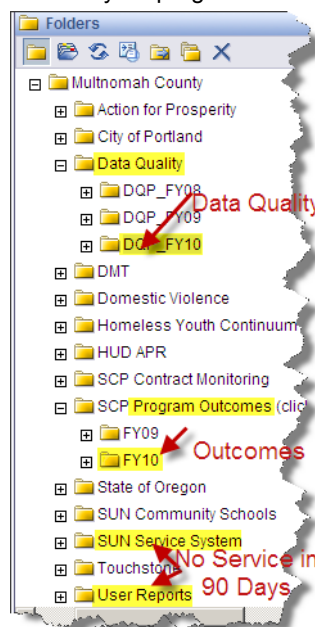
You've got a lot of clients on your caseload. You know that the ones who call you are getting help—but you have this nagging feeling that someone is slipping through the cracks? Or maybe you closed out a ton of clients earlier this year and think you



missed one. What can you do? Run the **No Service in 90 Days** report in the User Reports folder (or SUN Service System folder). This report will list everyone who hasn't had service in 90 days and tell you their entry date and the last time they had service.

OUTCOMES

It's the end of the fiscal year and you want to make sure that your program has met its contract requirements. How do you know? You can run the **Program Outcomes** report for your program found in the FY10 folder under SCP Program Outcomes. This report is available all year round for you to track your progress!



New or Departing staff



What are you going to do about the ServicePoint account of new or departing staff? Complete a User Setup/Disable Form when anyone needs a new account or when they leave. This form can be found on our website.

If staff are departing make sure to run a client caseload report and data quality report **before** they leave to ensure that everything is in order so the staff and ServicePoint transition is smooth! Remember the agency is still responsible for the departing person's data!!! **Don't** get stuck with the departing person's data problems.

If you are unable to run reports, or need help figuring out reports, send a message to

servicepoint@co.multnomah.or.us

And don't forget to have the departing person answer those pesky but **vital** exit questions (such as school enrollment status or case goals) for any clients that need to be exited before the staff departs.

HAVE A GREAT FISCAL
YEAR 2011.

ServicePoint Superstar



We have selected **Adriana Martinez**, of Catholic Charities, as the ServicePoint Superstar for June.

Adriana is the case manager for the CSBG ARRA program, also known as Action For Prosperity. This year, Adriana learned how to correctly enter data for this new program which began at the County in July 2009.

Adriana has kept up to date with her data entry, which is required weekly by this program.

If there are questions, Adriana does not hesitate to call the Data Management Team for assistance.

Great job Adriana!

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

What Makes a ServicePoint Superstar?

- ⇒ Meeting deadlines for data entry and clean up.
- ⇒ Asking questions, offering suggestions, providing constructive comments.
- ⇒ Using resources wisely: reading the manual and emailing or calling the ServicePoint Help Line when questions arise.
- ⇒ 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 June 25, 2010 and Friday July 9th**. 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.



Fabulous Four Now Complete—Introducing Sherry Yan

Please join the Multnomah County Data Management Team in welcoming our new Data Technician, Sherry Yan.

Sherry joins Multnomah County from IRCO Asian Family Center, where she was Program Coordinator for Anti-Poverty Services.

Sherry is our newest data whiz kid who has a fine eye for detail . . . So make sure your data is correct because there is no sneaking past her. Be on the lookout for emails from Sherry regarding reports, data quality and other Ser-

vicePoint related info. If you have any questions or would simply like to welcome her please feel free to email or call her.

Email: sherry.yan@co.multnomah.or.us

Data Helpline

503-970-4408

Fax

503-988-3332

Email:

ServicePoint@co.multnomah.or.us

Duplicate Data

by Sherry Yan

DUPLICATE ENTRIES

You see that your client already has an entry in the program and no exit date

Entry Date	Exit Date
10/29/2009	

You feel compelled to add a new entry date. You must resist! There should only be **one** open entry for each program.

Maybe there has been a change of employment status or income since the client enrolled. Maybe you are a SUN school and the entry was from two years ago. *It's ok.* The entry reflects demographic information on that date. We are capturing a picture of what is happening at entry. Any changes can be reflected when you exit a client. SUN schools do not need to worry about exiting students but exiting them when they no longer attend the school helps remove unnecessary names from enrollment lists.



DUPLICATE CLIENTS

You entered a client and didn't see that Kumar Patel was already in ServicePoint and participated in service four years ago. Now you see two Kumar Patels. What do you do? After making certain that these are the same person, go into the ServicePoint account that was created four years ago. Make sure you add all Kumar's information into that account, i.e. his ServicePoint ROI, his entry and all his activities or service transactions.

Then go into the ServicePoint account that you just created for Kumar in 2010. Follow these steps:

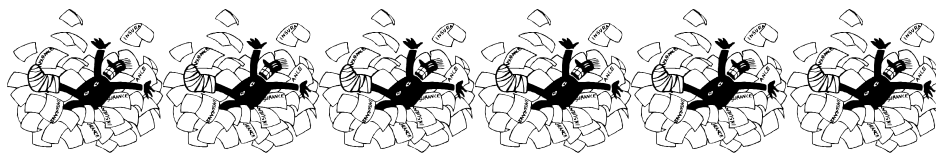
- Delete his household in the profile page by clicking on the trash can next to household type.

Type	Count
Two Parent Family	H 1

- Delete his ROI by clicking on the trash can next to the provider name.
- Delete the entry by clicking on the trash can next to the program name.
- Delete any needs and service transactions or activities the client has by clicking on the trash can next to the individual service/activity.

Finally email the ServicePoint team with the Client ID that needs to be deleted. If no one else has used this account, we will delete it.

Questions? Confused? Call or email the ServicePoint team for more detailed directions or help!



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.

Pop Quiz

1. How many open entries in entry/exits should a client have in each program or SUN school?
2. What report can I run to see what client demographic information is missing?
3. What folder can I find the No Service in 90 Days report?
4. True or False: If I don't know the answer to a demographic question, I should just put in a filler answer and go back and put in the real answer if I can remember to do it later.
5. What are the 4 things that need to be deleted from a client's duplicate ServicePoint record?

CRYPTOGRAMS

sBMB
BscemjsLgmdp
ztpt rhtvmpw
ghpignsb
sdpcw/samp



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

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

Dear Dorothy

Dear Dorothy,

I'm a SUN Site Coordinator. I know how essential it is to have my eSIS numbers entered for students—however some of my kids are enrolled at another school and I don't know the number. What should I do? I don't want it to say that the number is missing in the ART report. Should I just put in their date of birth or just some other number like 123456?

Signed,
Numberless in Portland



Hi Numberless,

You are right that eSIS numbers are essential!

However, if you have a student who is **not enrolled** at your school, then you do not need to enter in their eSIS number. You are right that the data quality report in ART might show that the eSIS is missing, but there is an easy fix!

On the profile page (the first page of the student's record) there is a school enrollment question. If you choose an option other than 'Enrolled at this school' then the data quality report will not show this as missing.

School Information	
Enrollment Status	<div><div></div><div>- Select -</div></div>
Current Grade Level	<div><div></div><div>- Select -</div></div>
Teacher/Counselor	<div><div></div><div>Enrolled at this school</div></div>
Other	<div><div></div><div>Enrolled at another school</div></div>
	<div><div></div><div>Home school</div></div>
	<div><div></div><div>Expelled</div></div>
	<div><div></div><div>Dropped out</div></div>

You should **never** enter text or filler numbers in the eSIS field—this can have a negative effect on ART reports. If you are enrolling an adult or someone under the age of 5, you may leave this field blank and the report will not show them as missing. If they are school-age (5-19 years old) and you do not have an eSIS number because they are not enrolled at your school, then simply answer the Enrollment status question as described above.

Dear Dorothy,

I have a client who hasn't had service in three months and I did not exit him. He came back into my program. Does this mean that I should create another entry for him?

Chasing My Clients

Dear Chasing,

Depending on your program requirements, you may not need to do anything except welcome your client back into the fold and begin entering services.

You should **never** create another entry for your client if he already has an entry into your program with no exit date!

If your client has been gone longer than a few months, you should exit him. Your manager will be sent periodic reports showing the clients that have not had a service for 90 days. This will give you a reminder if you have forgotten to enter the clients' services or if you forgot to exit him. You can also take this opportunity to try and contact the client and decide if the client should be exited.



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