ClientPoint Entry/Exit Workflow
MHDC Households/Families

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Entry

Home Page Dashboard	
Home Page	Select appropriate **Enter Data As** provider
ClientPoint	1. Enter Head of Household's **Name**, **Name data quality**, **SSN**, **SSN data quality** and **U.S. Military Veteran**? Optional: Enter nickname in Alias. 2. **Search**. a. If a correct match is found, click on **green plus** to the left of client name b. If no matches are found, verify name & SSN, click **Add New Client With This Info** 3. Back Date Prompt: change the date to the entry date and click **Set New Back Date**
Client Information	
Client Profile tab	1. Enter or verify accuracy of **Client Record** information. 2. Enter or verify accuracy of **Client Demographic** information. *3. Optional: Add or update **Residence History, Contact Information, Emergency Contacts, Client Notes, File Attachments** or **Incidents.***
Household tab	1. If a household exists, verify/update household makeup by clicking **Manage Household** 2. If no household exists, click Start **New Household** a. Answer **Household Type** question b. **Search** and **add** all family members to household c. Click **Continue** d. Complete the head of household status and relationships e. Complete the demographic information f. After last family member, click **Save & Exit**
ROI tab	1. Add **Release of Information.** a. Select all household members b. **Provider:** Verify this is correct c. **Release Granted:** Yes (If "No", contact your System Administrator) d. **Start Date:** Date signed by client e. **End Date:** 1 year from Start Date f. **Documentation:** Signed Statement from Client g. **Witness:** Enter your name 2. Click **Save Release of Information**
Entry/Exit tab	1. Click **Add Entry/Exit** 2. Complete **Entry Data** a. Select all members of household b. **Provider:** Verify this is correct c. **Type:** Standard d. **Entry Date:** Confirm date 3. Click **Save & Continue** 4. Complete **ICA Missouri – MHDC MHTF/HF Entry (2016)** Assessment for all household members 5. After last family member, click **Save & Exit**
Service Transactions	
Add Service	Follow instructions on page 3

Interim Review

Home Page Dashboard	
Home Page	Select appropriate **Enter Data As** provider
ClientPoint	1. **Search** for client's name or enter ID Number 2. Back Date Prompt: change the date to the update date and click **Set New Back Date**.
Client Information	
ROI tab *(if completing an Annual Assessment)*	1. Add **Release of Information.** a. Follow instructions for ROI on Entry 2. Click **Save Release of Information**

Entry/Exit tab	1. Click on **Interims** for the appropriate program
	2. Click **Add Interim Review**
	3. Complete **Interim Review Data**
	    a. **Interim Review Type:** Update or Annual Assessment
	    b. **Review Date**: Confirm date
	4. Click **Save and Continue**
	5. Complete **ICA Missouri – MHDC MHTF/HF Update (2016)** Assessment for all household members
	6. After last family member, click **Save and Exit**

Service Transactions	
Add Service	Follow instructions on page 3

Exit

Home Page Dashboard	
Home Page	Select appropriate **Enter Data As** provider
ClientPoint	1. **Search** for client's name or enter ID Number 2. Back Date Prompt: change the date to the exit date and click **Set New Back Date**
Client Information	

Entry/Exit tab	1. Click pencil icon next to **Exit Date**
	2. Complete **Edit Exit Data**
	    a. Select all household members
	    b. Exit Date: Confirm date
	    c. Select Reason for Leaving (optional)
	    d. Select **Destination**
	3. Click **Save and Continue**
	4. Complete **ICA Missouri – MHDC MHTF/HF Exit (2016)** Assessment
	5. Click **Save and Exit**

Service Transactions (Record Prior to Exiting Client)	
Add Service	Follow instructions on page 3

Record Service Transactions

Home Page Dashboard	
Home Page	Select appropriate **Enter Data As** provider
ClientPoint	1. **Search** for client's name or enter ID Number 2. Back Date Prompt: change the date to the update date and click **Set New Back Date**
Service Transactions	
Add Service	1. Click on **Add Service**: a. Select all applicable members of household b. **Service Provider:** Verify this is correct c. **Start Date:** Date service was provided d. **End Date:** Same as Start Date e. **Service Type:** Select from drop down menu f. **Provider Specific Services:** Select if client needs assistance with Rental Arrears or Last Month's Rent 2. Click **Save & Continue** 3. Complete **Edit Service** a. **MHDC Payee:** Enter the person receiving the payment b. **Monthly Rent Amount:** Enter monthly rent amount c. **Add Funding Source:** Refer to Fund Source tip sheet d. **Amount:** Enter amount paid 4. Need Information a. **Need Status:** Closed b. **Outcome of Need:** Fully Met 5. Click **Save & Exit**