Data Entry Exercise

Directions:

- You’ll be practicing the core workflow that you learned in ClientPoint Module – Entry/Exit (Data Entry 121). Make sure to watch this entire training before starting this exercise.
- **You need a ServicePoint Training Site login to complete this exercise.** You’ll receive your username and password to the ServicePoint Training Site within 2 business days of your New User Online Training registration. If you do not receive your ServicePoint Training Site login within 2 business days, please contact us. (Step 2.2 on the To Do List.)
- For this exercise, you will enter a new client into the ServicePoint Training Site using a training provider (not your agency’s providers). Use any of your training materials to complete this exercise.
- You need to check your own work using the Data Entry Exercise - Answer Video. Try not to look ahead!

Optional Challenge! Step 1: If you work with families, try adding additional household members to this exercise! If you choose to complete this exercise for a household (more than 1 client), pay attention to boxes with an orange outline throughout this exercise for instructions to support you along the way!

1. Login to the training site (https://minnesota.servicept.com/training).

2. Click on Enter Data As in the top right-hand corner and enter EDA mode to provider 1413. *If you forget to enter EDA mode, you’ll have to re-create the client and start all over! Don’t forget!*

![Image of Provider Search]

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3. Click on ClientPoint on the left-hand menu.

4. Search for a client using combinations of the following prompts. We want you to practice getting in the habit of searching 3 different combinations of search prompts to confirm a client record doesn’t already exist for the client.
   a. First Name: Enter your first name*
   b. Last Name: Enter your last name*
   c. Name Data Quality: Full Name Reported
   d. Alias: Leave blank
   e. Social Security Number: Leave blank
   f. Social Security Number Data Quality: Client Refused
   g. U.S. Military Veteran: Yes

5. Complete all search fields using the information below.
   a. First Name: Enter your first name*
   b. Last Name: Enter your last name*
   c. Name Data Quality: Full Name Reported
   d. Alias: Enter “SHARED” (For the purpose of the exercise, we are going to enter “SHARED” as the client did consent to share their data.)
   e. Social Security Number: Leave blank
   f. Social Security Number Data Quality: Client Refused
   g. U.S. Military Veteran: Yes

   *You will be using YOUR first name and YOUR last name so we can easily determine which client you created. All other information is fabricated.

6. Click on Add New Client with this Information. If this button is grayed out, you missed Step 4! You’ll first need to search for the client at least once in the system before it allows you to add a new client with the information.
7. Backdate to the first day of the current month in the pop-up that appears. If you missed the pop-up, you can still backdate by clicking on Back Date in the top right-hand corner. Please note, 5/1/2017 was used in the Answer Video.

8. Click on the star in the top right corner to add this client as a favorite. Use “favorites” to quickly access clients whose records you commonly use and would like to access from session to session.

9. In the Client Profile tab, complete the Universal Profile Assessment using the following information.
   a. Relationship to Head of Household: Self
   b. Date of Birth: 2/18/1970
   c. Date of Birth Type: Full DOB Reported
   d. Gender: Male
   e. Race 1: Asian
   f. Race 2 – 5: Leave blank
   g. Ethnicity: Non-Hispanic/Non-Latino
   h. Agency’s Client ID #: Leave blank
   i. Date of ROI Consent: For this exercise, the date should be the first day of the current month.
      i. A note about ROI Consent: It is the responsibility of the agency with the first signed ROI (the agency creating the shared client record) to complete this field. ROIs do not expire. If the date field is completed and a new ROI is signed, the new date should not be entered into this field. In fact, if there is a date here you do not need to ask the client to sign a new ROI!

10. Click on Save.

11. Skip the Households tab as we are adding a single client for this exercise. You do have the option of following our Optional Challenge (see box below).
12. Skip ROI tab for this exercise. You do have the option of using the ROI tab, but it is for agency use only and is considered additional documentation that the client signed the ROI consenting to share their data with the Minnesota statewide data sharing group.

13. In the Entry/Exit tab, click on Add Entry/Exit.

14. In the first Entry Data pop-up, complete the following information.
   a. Provider: Should be filled in as the provider you are in Enter Data As mode to. You entered EDA mode in Step 2 to provider 1413.
   b. Entry Type: HUD (For this exercise, we want you to select HUD. This may not be the Entry Type you select when you enter data on the live site. Follow your program-specific workflow when doing live data entry.)
   c. Start Date: Should be filled in as your system date, which is in backdate mode to the first day of the current month.

15. Click on Save & Continue.

16. In the next pop-up, you will see the Program Specific All-Inclusive Assessment below the household table as your assigned Entry Assessment. This is an abbreviated version of an All-Inclusive Assessment that you will need to complete as part of the Funder Specific Exercise (Step 4.3 of New User Online Training).

17. Complete this assessment following the prompts provided in bright green throughout the assessment in ServicePoint. Complete all data elements that appear on the assessment.
Optional Challenge! Step 4: If enrolling a household, be sure to respond to all required data elements on each household member’s Entry Assessment by clicking on the household member’s names that appear on the left hand side of the Entry/Exit Data pop-up.

18. Confirm you responded to all required questions and have green checkmarks for all of your HUD Verification sub-assessments before clicking on Save & Exit.

19. Write down the client ID on a piece of paper so you do not forget it!

20. Log off of ServicePoint by clicking on Logout at the bottom of the left-hand menu.

21. Pretend time has gone by and it is now time to exit the client.

22. Login to the training site (https://minnesota.servicept.com/training).

23. Click on Enter Data As in the top right-hand corner and enter EDA mode to provider 1413.
24. There are a few ways to access the client record. Try to figure out how to get back into your client's record! If you get stuck, read the tip that is upside down below.

Tip: There's more than one way to access the client's record. As you starred this client as your favorite, click on the Favorites tab on the left-hand menu. Click on the Client Profile with your client's ID.

25. For the purpose of the training exercise, leave the backdate as TODAY’S DATE (the date you are completing this exercise) in the pop-up that appears. If you missed the pop-up, you can still backdate by clicking on Back Date in the top right-hand corner. (If you are not doing live data entry for Exits, set the backdate to the date of the client’s Exit.)

26. In the Entry/Exit tab, click on the pencil to the left of the blank exit date.

27. In the first Edit Exit Data pop-up, complete the following information.
   a. Exit Date: Should be filled in as your system date, which is in backdate mode to today’s date.
   b. Reason for Leaving: Leave blank, this is not required as part of the Core Workflow.
   c. Destination: Select “ Owned by client, with ongoing housing subsidy.”

Optional Challenge! Step 5: If exiting a household, be sure to include all household members by checking the boxes that appear at the top of this pop-up.

28. Click on Save & Continue.

29. In the next pop-up, you will see the Program Specific Exit Assessment below the household table as your assigned Exit Assessment. This is an abbreviated version of an Exit Assessment that you will need to complete as part of the Funder Specific Exercise (Step 4.3 of New User Online Training).

30. Complete this assessment following the prompts provided in bright green throughout the assessment. Complete all data elements that appear on the assessment.
31. Confirm you responded to all required questions and have green checkmarks for all of your HUD Verification sub-assessments before clicking on Save & Exit.

**Congrats!** You are done with the Data Entry Exercise. Watch the [Data Entry Exercise – Answer Video](#) to check your work! If you missed something, make the correction before starting your Funder Specific Exercise (Step 4.3 in the New User Online Training).

**Want more practice?** Create a client record using the same steps (following the step-by-step instruction or try from memory!). The ServicePoint [Training](#) Site is your playground. Create as many client records as you’d like until you feel comfortable!