Using "Enter Data As" in ServicePoint

What is Enter Data As (EDA)?

- EDA is a tool in ServicePoint that allows you "jump" to another part of your agency or another agency's tree for data entry and reporting purposes.
- All data is currently created by a "Parent Provider." With EDA, we will "jump" to the provider in which the client is being entered.

Why Use EDA

- EDA is the recommended workflow from Bowman Systems to optimize the use of ServicePoint.
- Proper use of EDA:
  - Eliminates the need to use drop down menus to select the client's program when doing data entry.
  - Reduces data entry errors.
- EDA is important to control the visibility of data.
- For agencies that cover multiple CoCs, EDA limits visibility only to those in the CoC.
- Will become vital in controlling client privacy when data sharing is implemented.
  - Only users with visibility to the 'provider creating' (the provider you select as EDA) will be able to see the data you enter.

When to Use EDA

- Users will go into EDA mode to do client entry BEFORE searching for or entering a client into the system.
- All data entry or updates should be done in EDA mode to the specific program provider.

EDA after Logging In

1. Click on the *Enter Data As* link on the top right corner of ServicePoint.
2. Type in the Provider ID number or search the name of the Entry/Exit or Service Provider in which the client is enrolled. (See diagram on last page for more details.)
   - Do not select a provider that says: (no data entry).
   - If you do not select the correct provider or forget to do EDA, your data will not be entered or shared correctly.
3. Search for an existing client or add a new client/household.
4. Continue through data entry workflow as usual.
   - NOTE: With the addition of using EDA, it is no longer necessary to search for and select the Provider when creating entry/exits and service transactions for clients. The Provider will be already selected as the default.

When to Exit EDA

1. When you are done doing data entry for that client or that provider, exit EDA mode.
2. To exit, click on the selected provider next to the Enter Data As icon in the top right corner of the screen.
3. You will now "jump" back to your original provider level.

If Your Client is in More Than One Program

1. Complete data entry for one provider program, then exit EDA mode.
2. Switch to EDA for second provider program.
   - Enter client into second provider.
   - Complete any additional assessment questions.
   - Click "Verify and Save" at the end of the assessment.
   - Add any additional services or other information required for that provider's funding source.
   - Exit EDA mode.
3. Repeat as necessary for any additional programs the client is in.

If Your Client Changes Programs

1. EDA to the provider from which the client is exiting.
2. Complete the exit and any required assessment, case plan, or matrix assessments.
3. EDA to the provider for which the client is now entering.
4. Create a new entry for the client/household.
5. "Verify and Save" the assessment info for each household member as you complete it.
6. Create any services, matrix assessments, etc.

EDA – Key Reminders

- Check often to make sure you are in the correct EDA provider.
- You will see all providers you have EDA access to when using drop down or search menus. These will be available to you even if you are not in EDA.
- If you have to use a drop down or search menu to select the provider you want when creating an entry/exit, service, ROI, or Matrix, this is an indicator that you are NOT properly using EDA. IF this happens:
  - Stop, go into EDA mode, and select the correct provider.
  - If you have already entered information while not properly in EDA you will need to delete and re-enter it.
- If you cannot find the correct EDA provider in ServicePoint, contact the HMIS Helpdesk for assistance.

ART Reporting

- If you enter data for clients while in EDA to a provider outside of your agency tree, you will need to use the EDA prompt when running a report for that provider.
- Your user role will also determine whether or not you need to use the EDA prompts in ART. You can check your user role in ServicePoint in the top right of the screen, under your name.
  - Agency Admin and Case Manager III (most users) should leave the EDA prompts blank (-Default Provider-) when running ART reports.
  - Case Manager II (few users, mostly Salvation Army) **do** need to select a provider in the first EDA prompt when running ART reports.

EDA Data Check Report

- If you fail to EDA to the correct provider when entering or updating data, you will need to fix it.
- Run the EDA Data Check report often to check your data and make sure it is being entered correctly.
- This report is located Public Folder → MN SSA Report Gallery (Secure) → Data Quality Tools→ EDA DQ→ *EDA DQ EE* (for providers using entry/exit records to track client participation) or *EDA DQ Svc* (for providers using service records to track client participation).
- Compare the Provider Creating to the Entry/Exit or Service Provider ID.
  - These should be the same for all clients.
  - If they are not the same, you will need to EDA to the correct provider (provider creating) and re-enter the data.
- Red = Error
- Yellow = Possible Error
- This report has 5 tabs. Focus on the following for your EDA data quality check:
  - Counts: Shows total mismatched records.
    - EE Provider Detail: Entry records that were created by a different Entry Provider.
    - These Entry Records were not created by the Entry Provider. To fix the problem, delete the Entry-Exit Record, EDA to the entry provider and record the entry again. (Remember to include household members.)
  - Client Provider Detail: Client records that were created by a different Entry provider.
    - The Client Records on this page were not created by the Entry Provider.
    - If this is the client's first entry or service, delete the client record, go into EDA mode to the correct provider, and re-enter the client.
    - If this is NOT the client's first entry or service, this is not an error. DO check the Entry Provider to be sure the entry and data were created by the correct provider.

EDA to these providers

No data entry here. Do not EDA to these providers

Level I
Wilder Research
(no data entry)

Level 2
CoC and LSA
(no data entry)

Level 2
Funder Reporting Lead
(no data entry)

Level 3
Agency #1
(no data entry)

Level 3
Agency #2
(no data entry)

Level 4
Agency Project
(no data entry)

Level 4
Agency Project
(data entered here)

Level 4
Agency Project
(data entered here)

Level 4
Agency Project
(data entered here)

Level 5
Project Breakout
(data entered here)

Level 5
Project Breakout
(data entered here)