

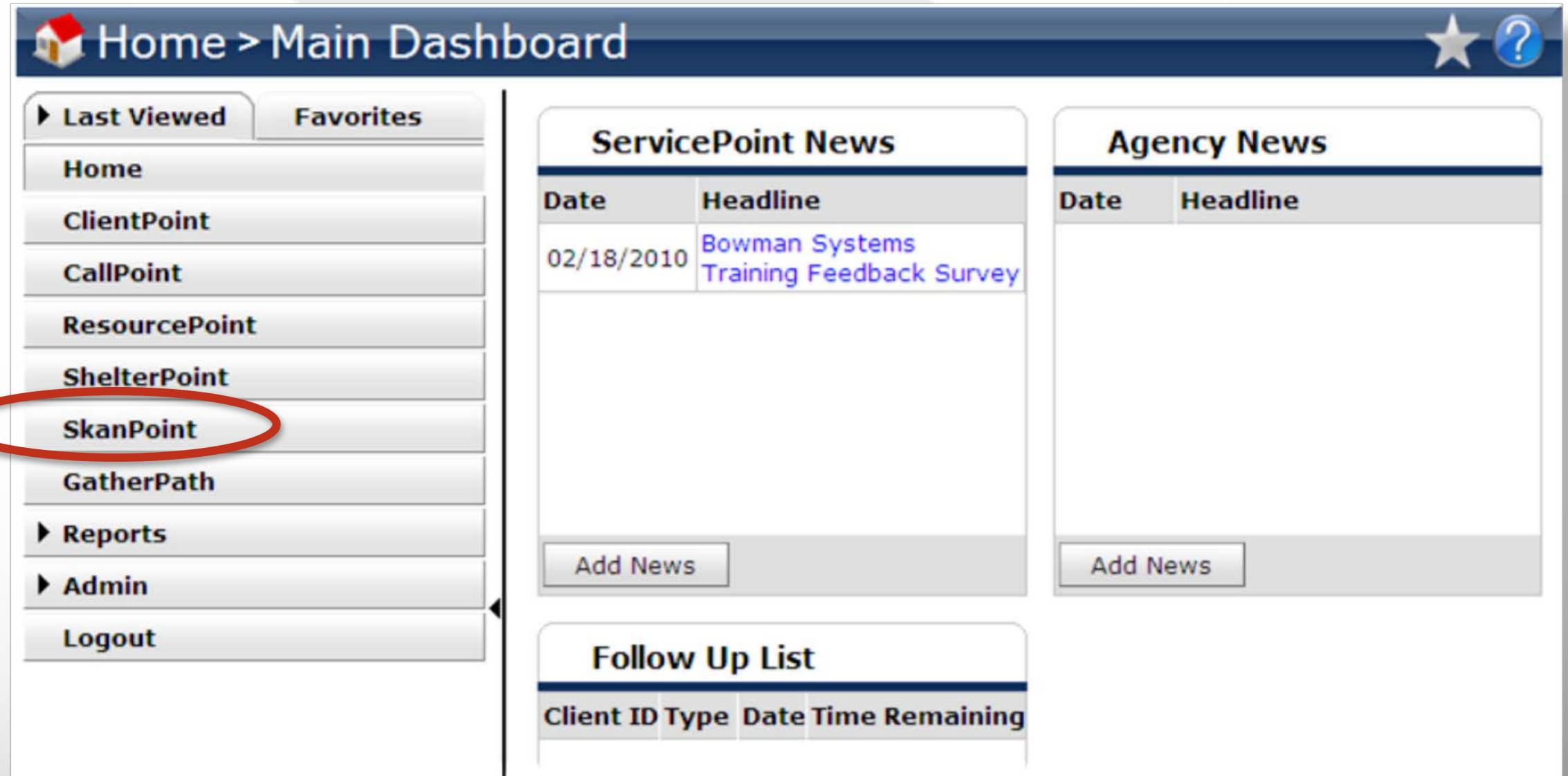
*SkanPoint*TM

ServicePoint version 5.5.1

Data-Entry Workflows



SkaniPoint v5.5.1



The screenshot shows the 'Home > Main Dashboard' interface. On the left is a navigation menu with 'SkaniPoint' highlighted in a red oval. The main content area features two news sections: 'ServicePoint News' and 'Agency News'. The 'ServicePoint News' section contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. Below these sections is a 'Follow Up List' table with columns for Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



What is *SkanPoint*?

SkanPoint is a *ServicePoint* utility to quickly create Service Transaction Records for larger groups of Clients & Consumers, which extend beyond Clients/Consumers within a single *ServicePoint* household. This module is intended to streamline the data-entry process for staff working on behalf of high volume service Providers, allowing *ServicePoint* Users to easily create Client/Consumer lists, issue ID cards, and record one service (or multiple services) for groups of Clients/Consumers in a short period of time.

***** PLEASE NOTE:** *This module is visible/accessible ONLY if turned on by the Administrator in both the Provider and User Profile levels. ****



Learning Objectives

After reviewing this presentation, you will understand how to:

- **Login to ServicePoint®**
- **Navigate to *SkanPoint***
- **Create new Client/Consumer Lists**
- **Manage Existing Client/Consumer Lists**
- **Generate Photo & Non-Photo Client ID Cards**
- **Create Bulk Single-Service Transaction Records**
- **Create Bulk Multiple-Service Transaction Records**
- **Create Bulk Shelter Stay (Unit Assignment) Records**



SkanPoint Workflows

Workflow #1 – Creating New Client/Consumer Lists

(Refer to Slides #6 - #13)

Workflow #2 – Managing Existing Client/Consumer Lists

(Refer to Slides #14 - #21)

Workflow #3 – Generating Photo/Non-Photo ID Cards

(Refer to Slides #22 - #28)

Workflow #4 – Creating Bulk Single-Service Transactions

(Refer to Slides #29 - #49)

Workflow #5 – Creating Bulk Multiple-Service Transactions

(Refer to Slides #50 - #70)

Workflow #6 – Creating Bulk Shelter Stays (Refer to Slides #71 - #79)

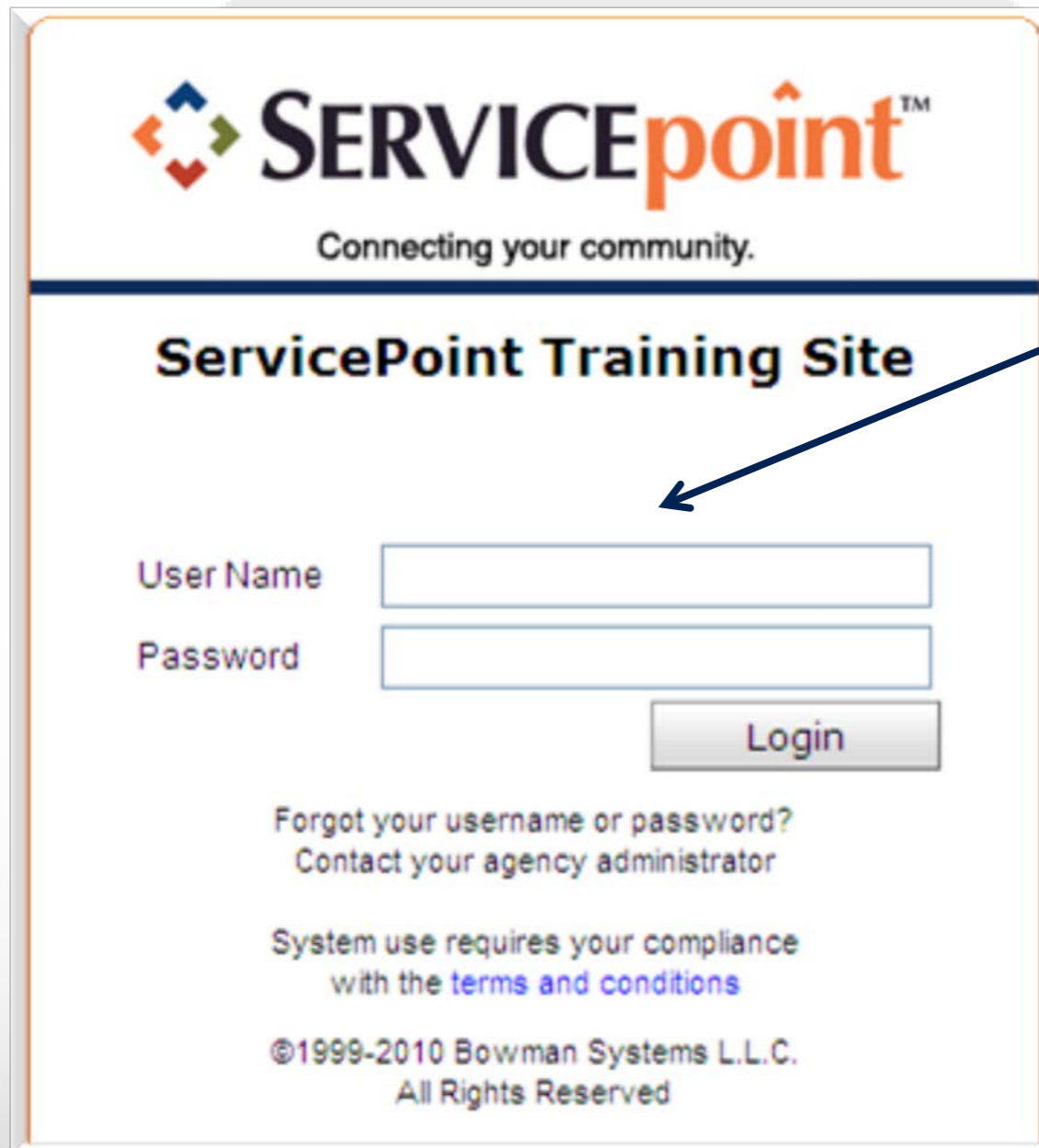


SkanPoint Workflow #1

Creating New Client/Consumer Lists



SkanPoint v5.5.1



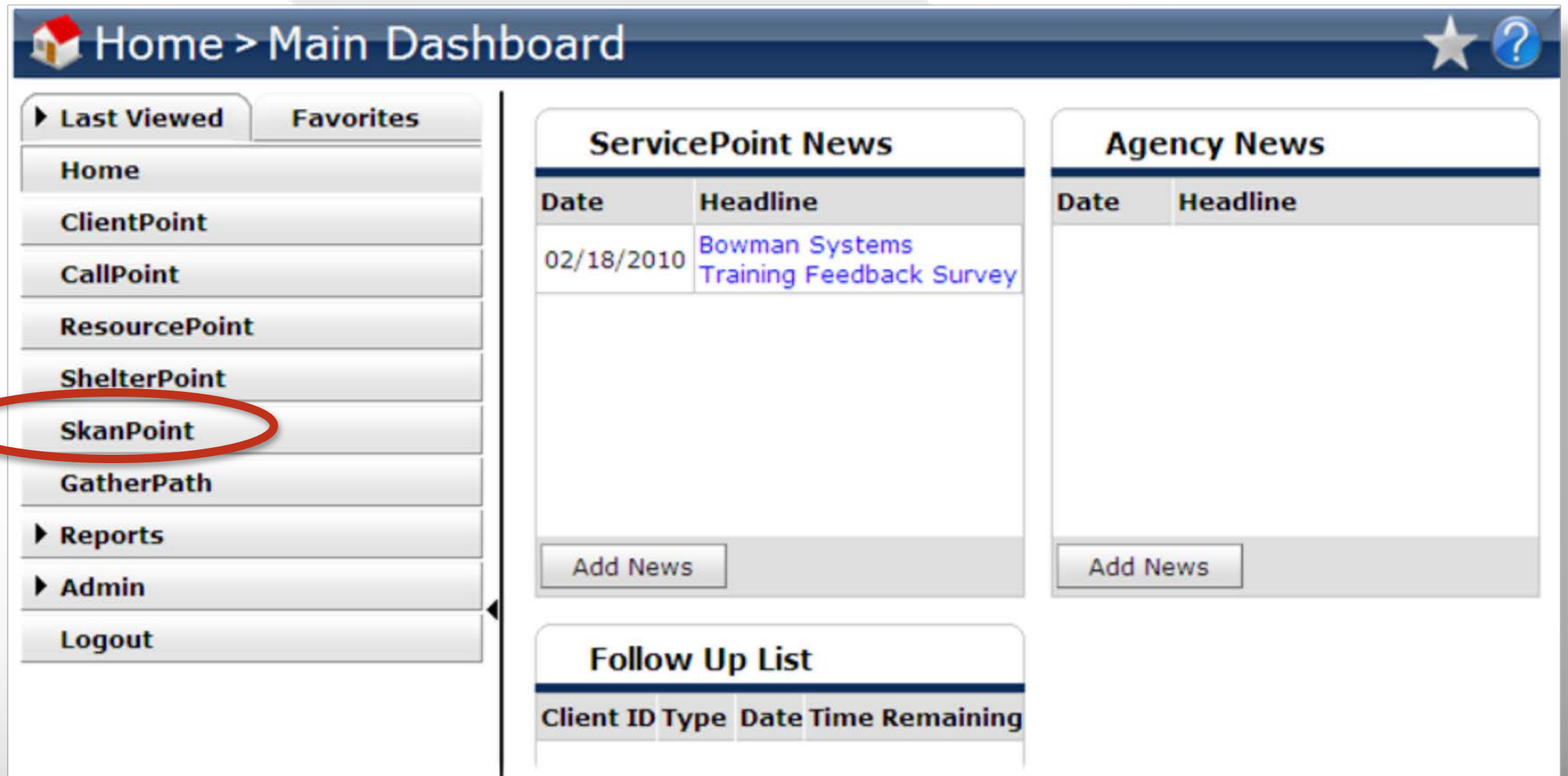
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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SkaniPoint v5.5.1



Home > Main Dashboard

Last Viewed **Favorites**

- Home
- ClientPoint
- CallPoint
- ResourcePoint
- ShelterPoint
- SkaniPoint**
- GatherPath
- ▶ Reports
- ▶ Admin
- Logout

ServicePoint News

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Add News

Agency News

Date	Headline
------	----------

Add News

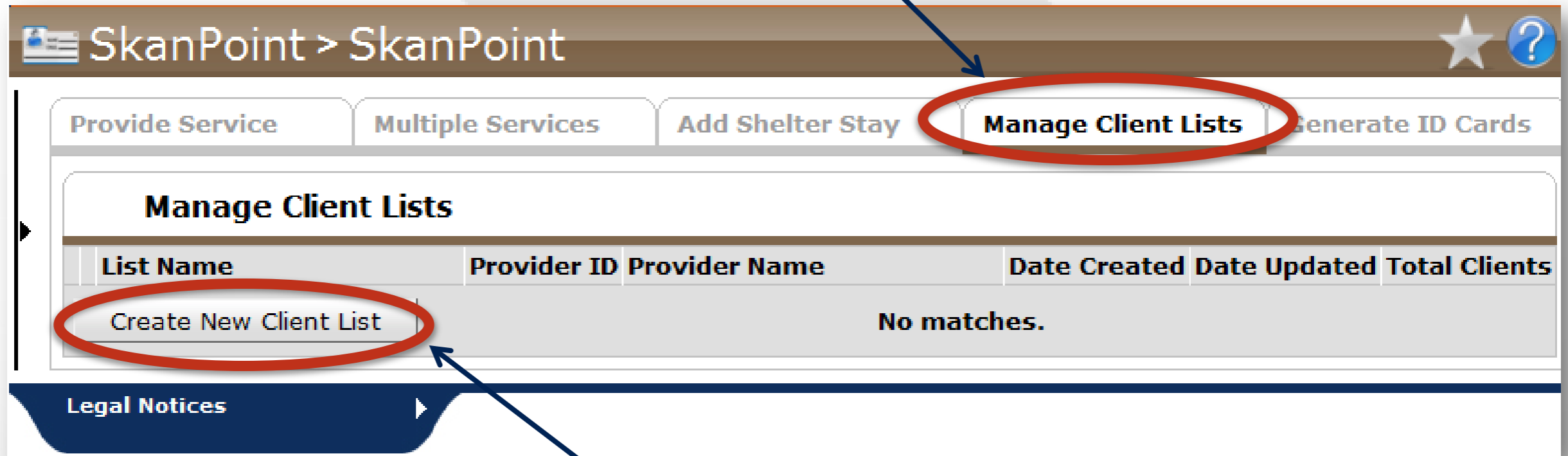
Follow Up List

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------





STEP 1: Single left-click on the **Manage Client Lists** tab.



SkanPoint > SkanPoint

Provide Service Multiple Services Add Shelter Stay **Manage Client Lists** Generate ID Cards

Manage Client Lists

List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
Create New Client List					No matches.

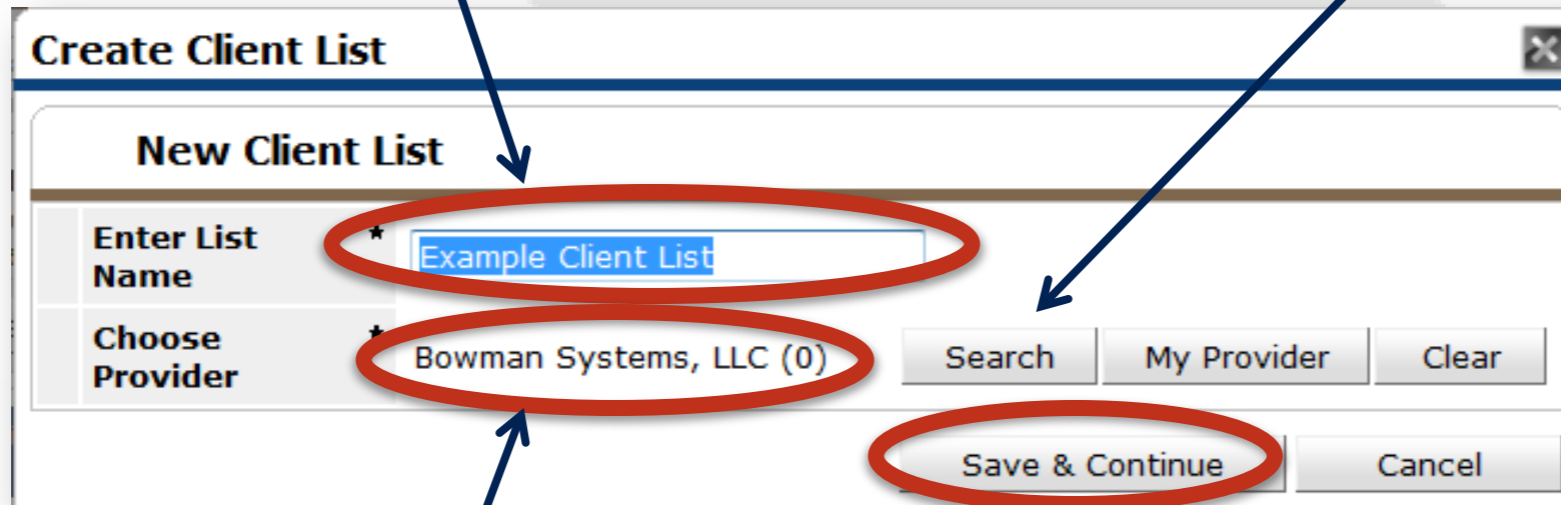
Legal Notices

STEP 2: Single left-click on the **Create New Client List** button.





STEP 3: Type the title of your new list in the **Enter List Name** field.



Create Client List

New Client List

Enter List Name *	<input type="text" value="Example Client List"/>
Choose Provider *	<input type="text" value="Bowman Systems, LLC (0)"/>

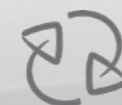
Search My Provider Clear

Save & Continue Cancel

STEP 4 Note: By default, the Provider that will be associated with accessing & maintaining this new Client List will be the ServicePoint® User's default Provider. If a different Provider should be selected, single left-click the **Search** button, then search for and select the desired Provider by single left-clicking on the **Green Plus Symbol** located to the left of the Provider's name.

STEP 4: Double-check & confirm the Provider that will be associated with maintaining & accessing this new Client List.

STEP 5: Single left-click the **Save & Continue** button.



Workflow #1:
Creating New Client List(s)

STEP 6: Type the Client Profile ID Number of the Client you wish to add to your new list, OR single left-click the **Search** button to locate the Client by name or SSN.

Client List - Example Client List

Client Search

Last ID Skanned
Client Name
Type or Skan Client ID to Add OR

Client List

ID	Client Name	Alias	Social Security Number
<input type="button" value="−"/> 3	Example, Outreach		
<input type="button" value="−"/> 2	test, Just A		888-88-8888
<input type="button" value="−"/> 1	ZZ000000001, Anonymous		

Showing 1-3 of 3

STEP 7: Single left-click the **Add New Client to List** button.

STEP 8: Single left-click the **Exit** button when done.

STEP 7 Note: Clients that have been added to the list will appear under the “Client List” section. If a Client was added in error, the Client can easily be removed from the list by single left-clicking the **Red Minus Symbol** located to the left of the Client ID Number & Name.





If you single left-clicked the **Search** button to locate the Client by name or SSN in **STEP 6**, follow these steps to locate the Client you wish to add to your new list:

Client Search

Please fill in one or more fields

First Name	<input type="text"/>
Last Name	<input type="text" value="Test"/>
Alias	<input type="text"/>
Client ID	<input type="text"/>
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>
Exact Match	<input type="checkbox"/>

Search Results

ID	Client Name	Alias	Social Security Number	Banned
2	test, Just A		888-88-8888	

Showing 1-1 of 1

STEP 6a: Type the Client Name, Alias, Profile ID Number, or SSN of the Client you wish to add to your new list, then single left-click the **Search** button.


STEP 6 Note: Clients that are possible matches to your search will appear under the "Search Results" section.

STEP 6b: Single left-click the **Green Plus Icon** button to add a desired Client to your Client List.

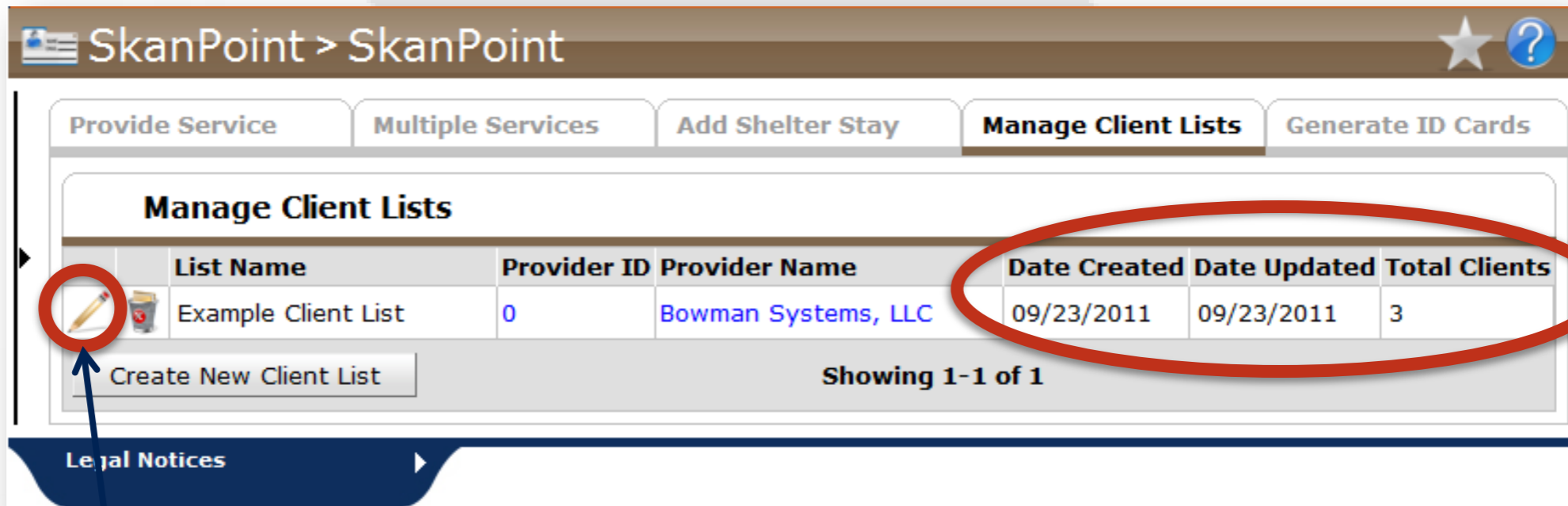
STEP 6c: Single left-click the **Exit** button when done.



Workflow #1:


 Creating
New Client
List(s)

Your new Client List will appear under the “Manage Client Lists” section of the Manage Client Lists tab. Summary information will appear to the right of the List Name. If you need to make any changes to the list, utilize the icons located to the left of the List Name.



List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
Example Client List	0	Bowman Systems, LLC	09/23/2011	09/23/2011	3

STEP 9: Single left-click the **Pencil/Edit Icon** button to revise your Client List, by either adding or removing individual Clients.

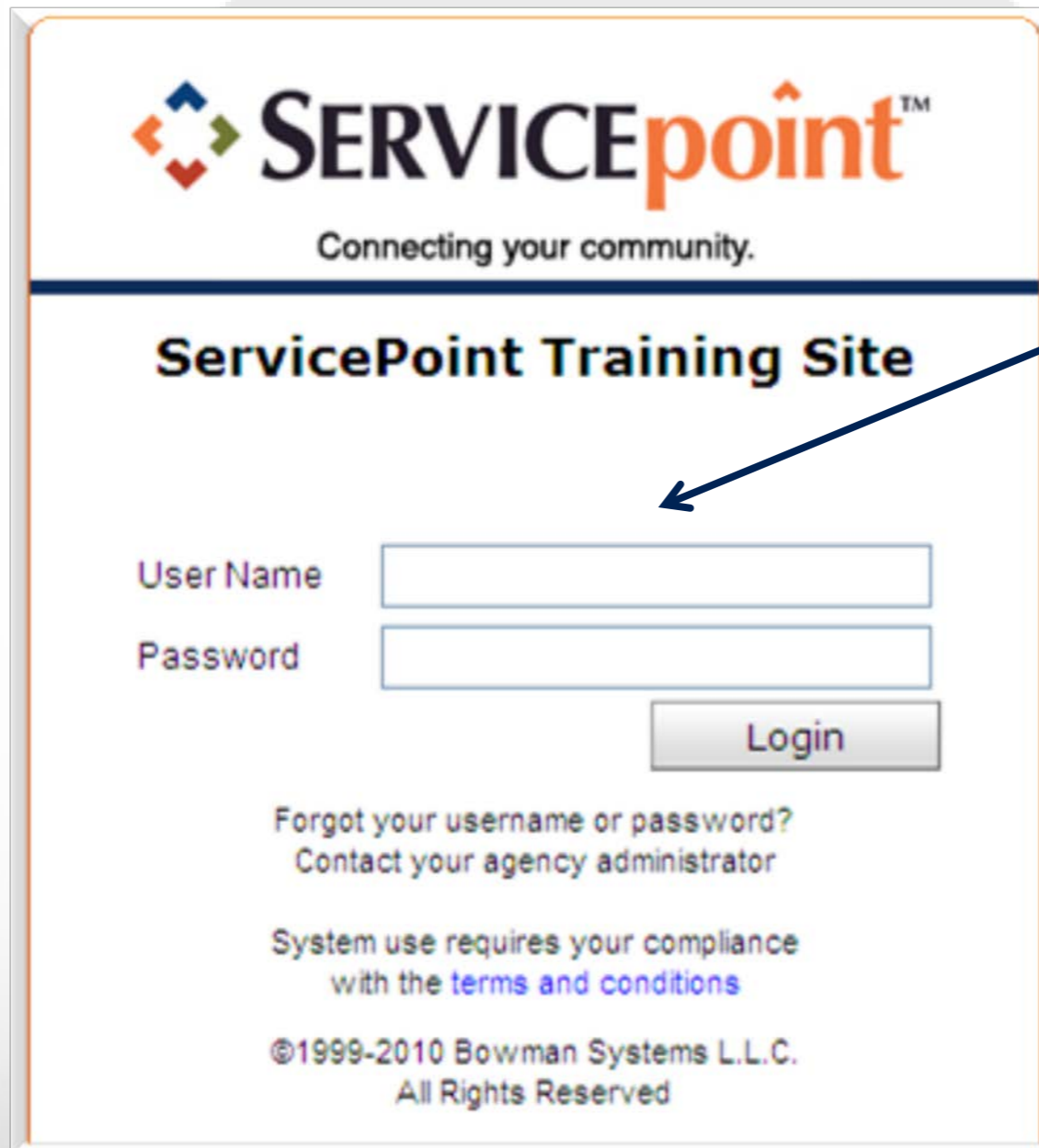


SkanPoint Workflow #2

Managing Existing Client/Consumer Lists



SkanPoint v5.5.1



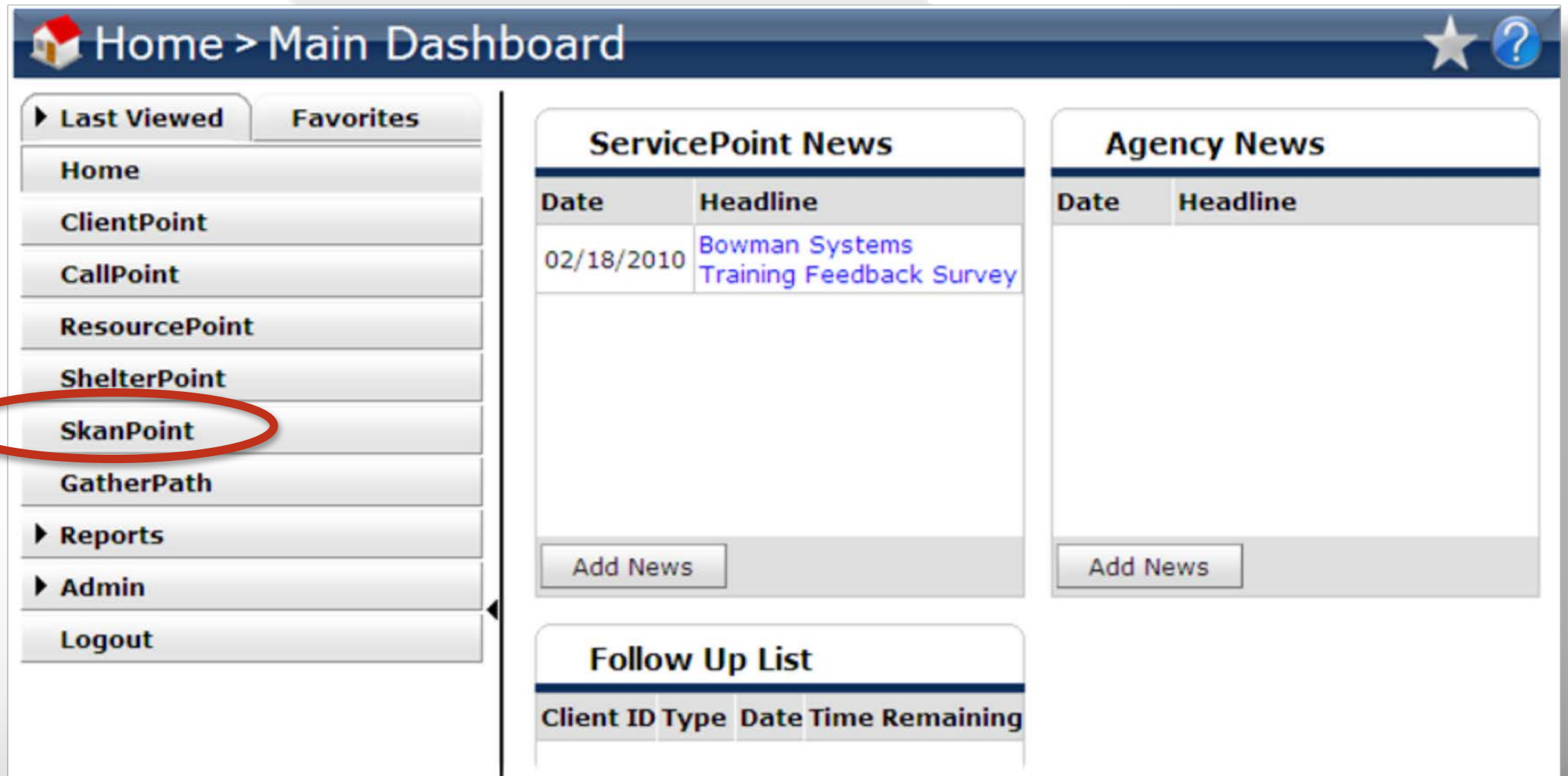
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation menu with 'SkaniPoint' circled in red. The main content area features 'ServicePoint News' and 'Agency News' sections, each with a table and an 'Add News' button. A 'Follow Up List' section is partially visible at the bottom.

Home > Main Dashboard

Last Viewed **Favorites**

- Home
- ClientPoint
- CallPoint
- ResourcePoint
- ShelterPoint
- SkaniPoint**
- GatherPath
- ▶ Reports
- ▶ Admin
- Logout

ServicePoint News

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Add News

Agency News

Date	Headline
------	----------

Add News

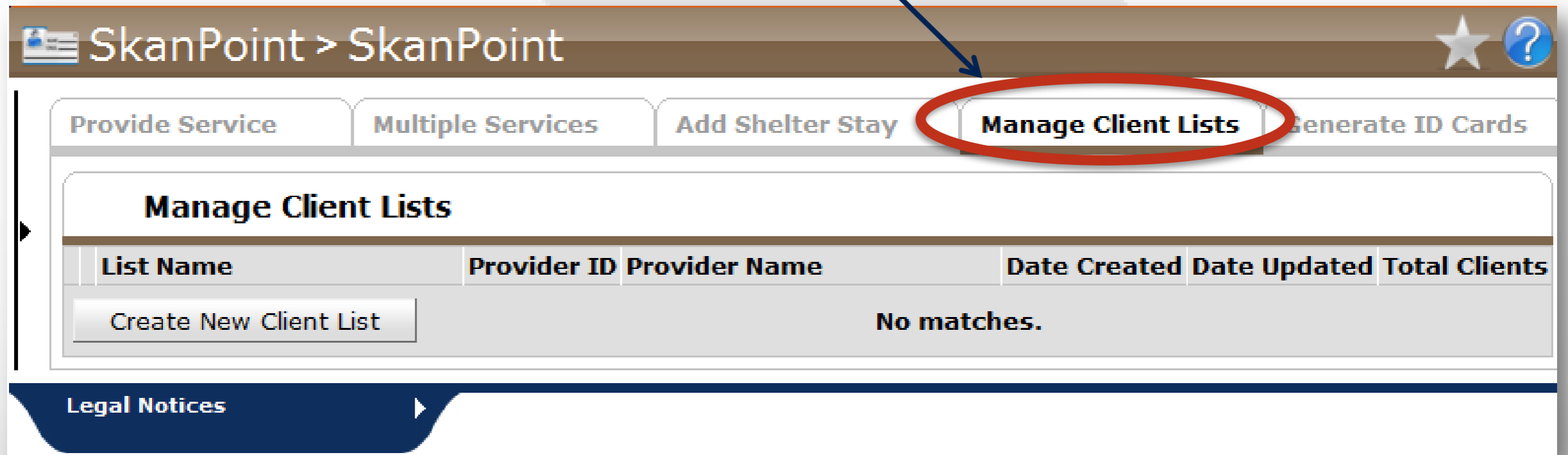
Follow Up List

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------





STEP 1: Single left-click on the **Manage Client Lists** tab.



SkanPoint > SkanPoint

Provide Service Multiple Services Add Shelter Stay **Manage Client Lists** Generate ID Cards

Manage Client Lists

List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
<input type="button" value="Create New Client List"/> No matches.					

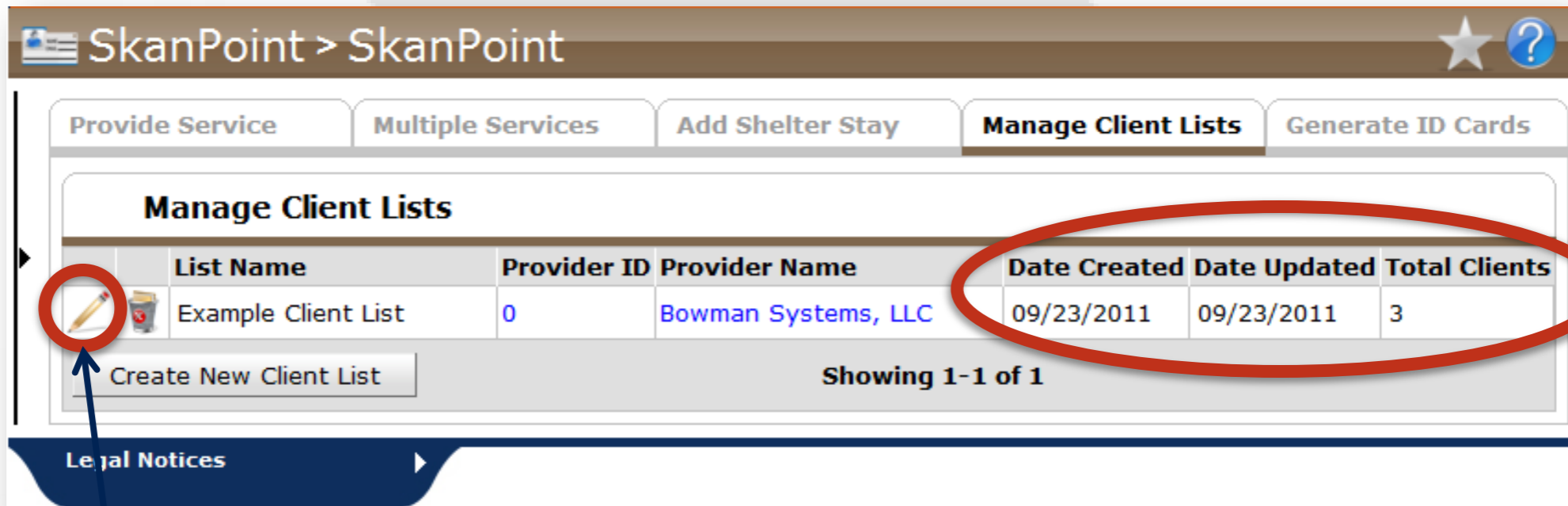
Legal Notices



Workflow #2:

Managing
Client List(s)

*Your existing Client List(s) will appear under the “Manage Client Lists” section of the **Manage Client Lists** tab. Summary information will appear to the right of the List Name. If you need to make any changes to a list, utilize the icons located to the left of the List Name.*



List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
Example Client List	0	Bowman Systems, LLC	09/23/2011	09/23/2011	3

STEP 2: Single left-click the **Pencil/Edit Icon** button to revise your existing Client List, by either adding or removing individual Clients.



Workflow #2:
Managing Client List(s)




STEP 3: Type the Client Profile ID Number of the Client you wish to add to your new list, OR single left-click the **Search** button to locate the Client by name or SSN.

Client List - Example Client List

Client Search

Last ID Skanned
Client Name
Type or Skan Client ID to Add OR

Client List

ID	Client Name	Alias	Social Security Number
 3	Example, Outreach		
 2	test, Just A		888-88-8888
 1	ZZ000000001, Anonymous		

Showing 1-3 of 3

STEP 4: Single left-click the **Add New Client to List** button.

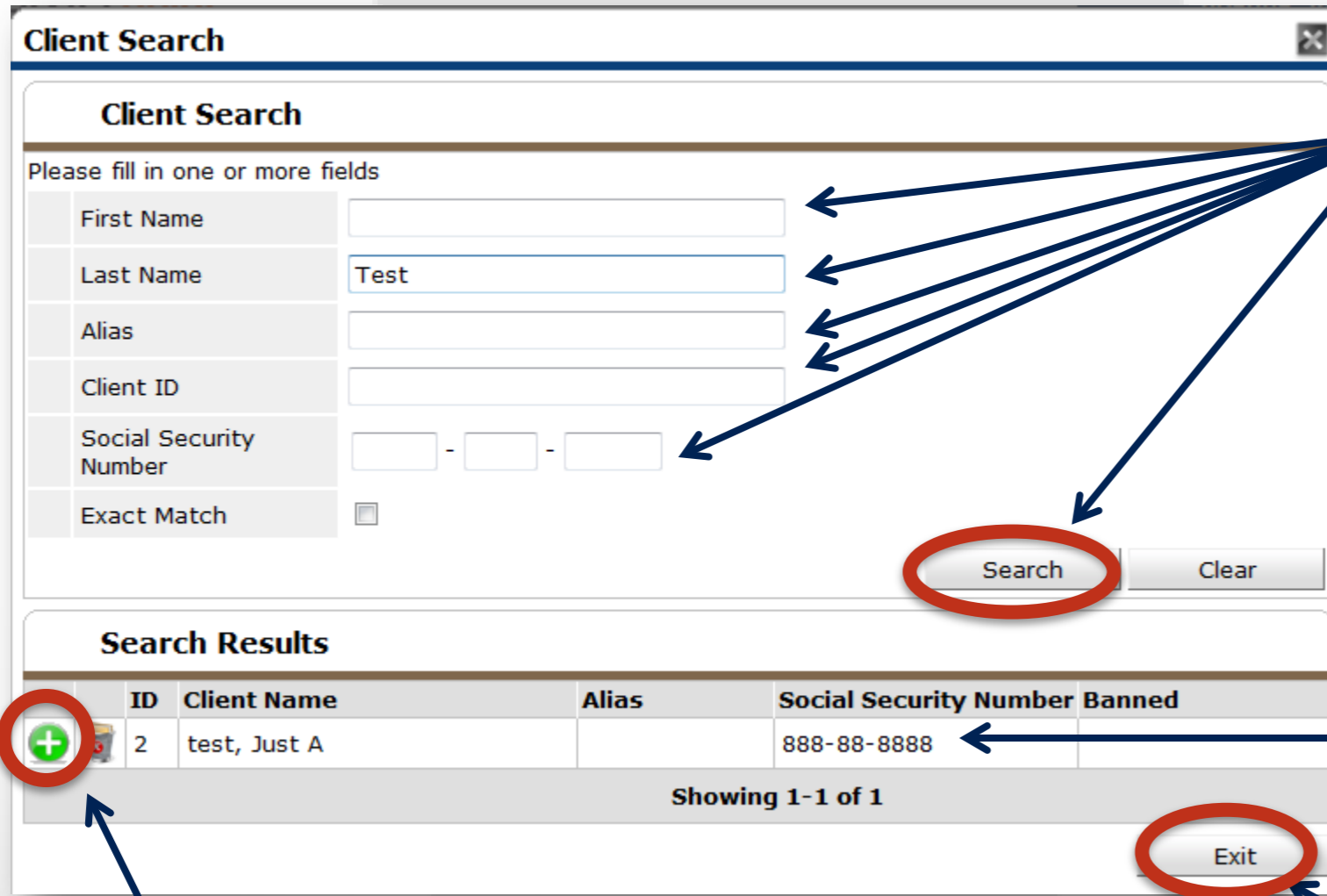
STEP 5: Single left-click the **Exit** button when done.

STEP 4 Note: Clients that have been added to the list will appear under the "Client List" section. If a Client needs to be removed from the list, the Client can easily be dropped from the list by single left-clicking the **Red Minus Symbol** located to the left of the Client ID Number & Name.



Workflow #2:
Managing Client List(s)

If you single left-clicked the **Search** button to locate the Client by name or SSN in **STEP 3**, follow these steps to locate the Client you wish to add to your new list:



Client Search

Please fill in one or more fields

First Name	<input type="text"/>
Last Name	<input type="text" value="Test"/>
Alias	<input type="text"/>
Client ID	<input type="text"/>
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>
Exact Match	<input type="checkbox"/>

Search Results

ID	Client Name	Alias	Social Security Number	Banned
2	test, Just A		888-88-8888	

Showing 1-1 of 1

STEP 3a: Type the Client Name, Alias, Profile ID Number, or SSN of the Client you wish to add to your list, then single left-click the **Search** button.

STEP 3 Note: Clients that are possible matches to your search will appear under the "Search Results" section.

STEP 3b: Single left-click the **Green Plus Icon** button to add a desired Client to your Client List.

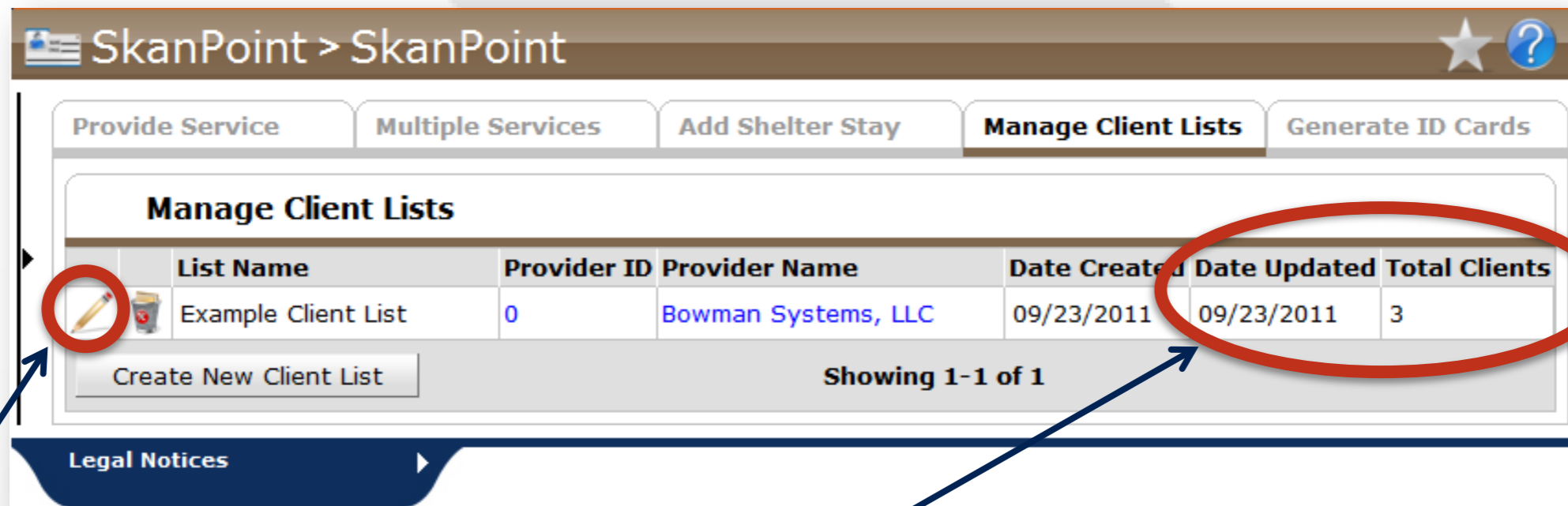
STEP 3c: Single left-click the **Exit** button when done.



Workflow #2:

Managing
Client List(s)

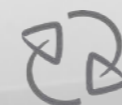
Your revised Client List will still appear under the “Manage Client Lists” section of the Manage Client Lists tab. Summary information will appear to the right of the List Name. If you need to make any additional changes to the list, continue to utilize the icons located to the left of the List Name.



List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
Example Client List	0	Bowman Systems, LLC	09/23/2011	09/23/2011	3

STEP 7: Single left-click the **Pencil/Edit Icon** button to further revise your Client List.

STEP 6: Double-check to confirm that your Client List edits were successfully completed.

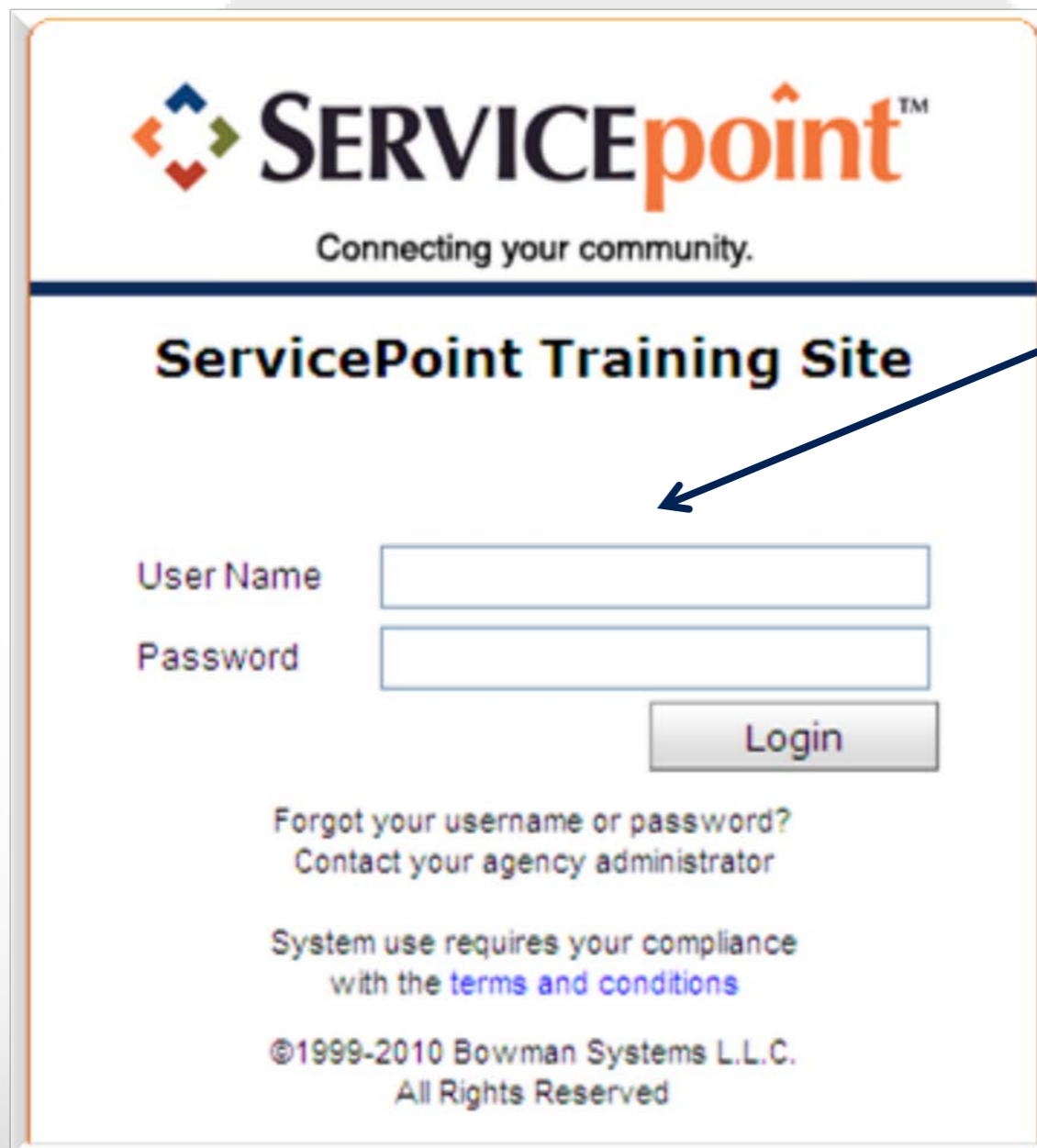


SkanPoint Workflow #3

Generating Photo/Non-Photo ID Cards



SkanPoint v5.5.1



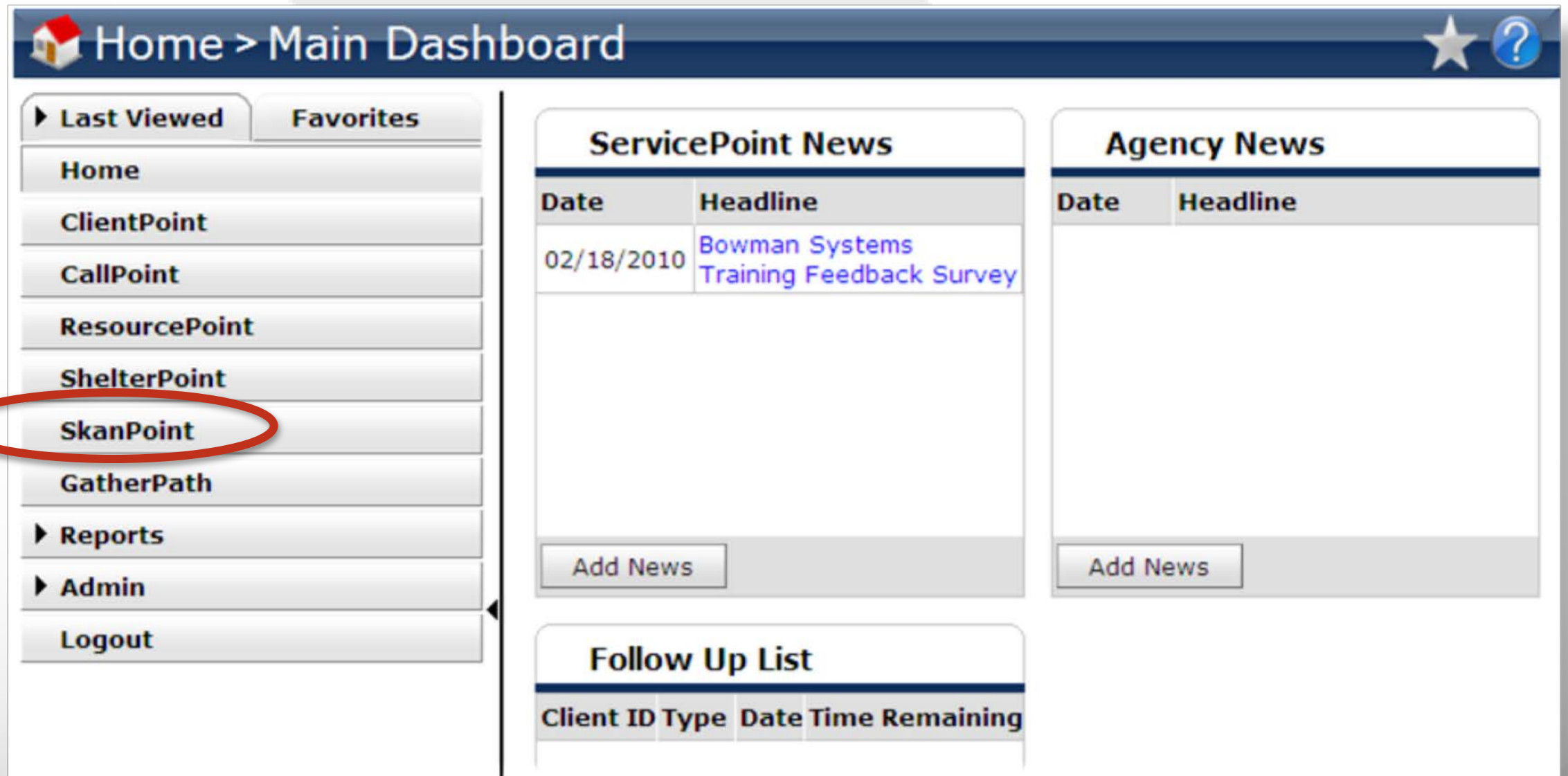
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SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation sidebar with a 'Last Viewed' tab and a 'Favorites' tab. The 'Last Viewed' list includes: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, **SkaniPoint** (circled in red), GatherPath, Reports, Admin, and Logout. The main content area is divided into three sections: 'ServicePoint News', 'Agency News', and 'Follow Up List'. 'ServicePoint News' contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. 'Agency News' is currently empty. 'Follow Up List' has a header with columns: Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Date	Headline
------	----------

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #3:
Generating Client ID Card(s)

STEP 1: Single left-click on the **Generate ID Cards** tab.

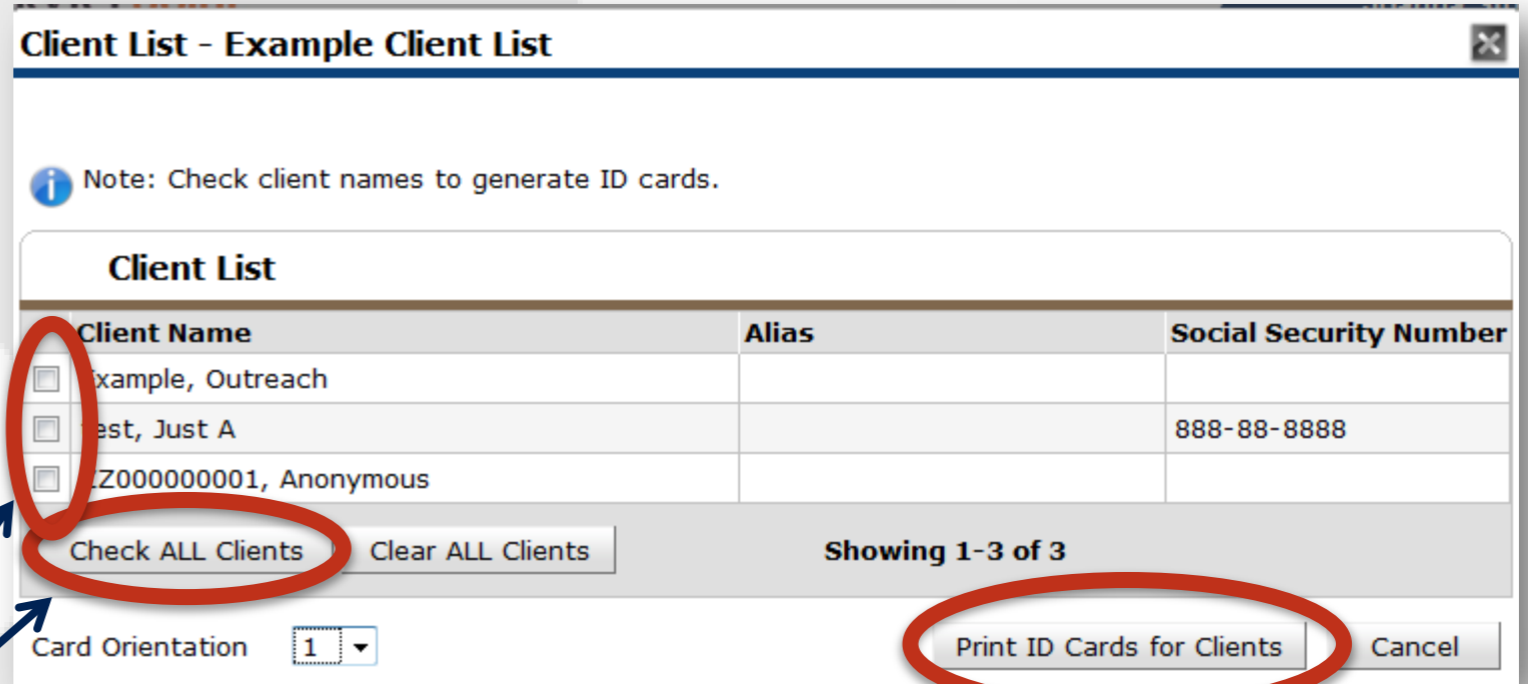
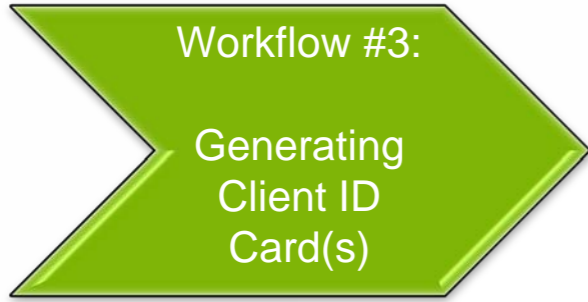


The screenshot shows the SkanPoint software interface. The breadcrumb navigation at the top reads "SkanPoint > SkanPoint". Below this is a horizontal menu with several tabs: "Provide Service", "Multiple Services", "Add Shelter Stay", "Manage Client Lists", and "Generate ID Cards". The "Generate ID Cards" tab is highlighted with a red oval and a blue arrow pointing to it from the instruction box above. Below the menu is a section titled "Generate ID Cards" containing a table with the following data:

List Name	Provider ID	Provider Name	Date Created	Date Updated	Total Clients
 Example Client List	0	Bowman Systems, LLC	09/23/2011	09/23/2011	3

Below the table, it says "Showing 1-1 of 1". At the bottom left of the interface, there is a "Legal Notices" link.



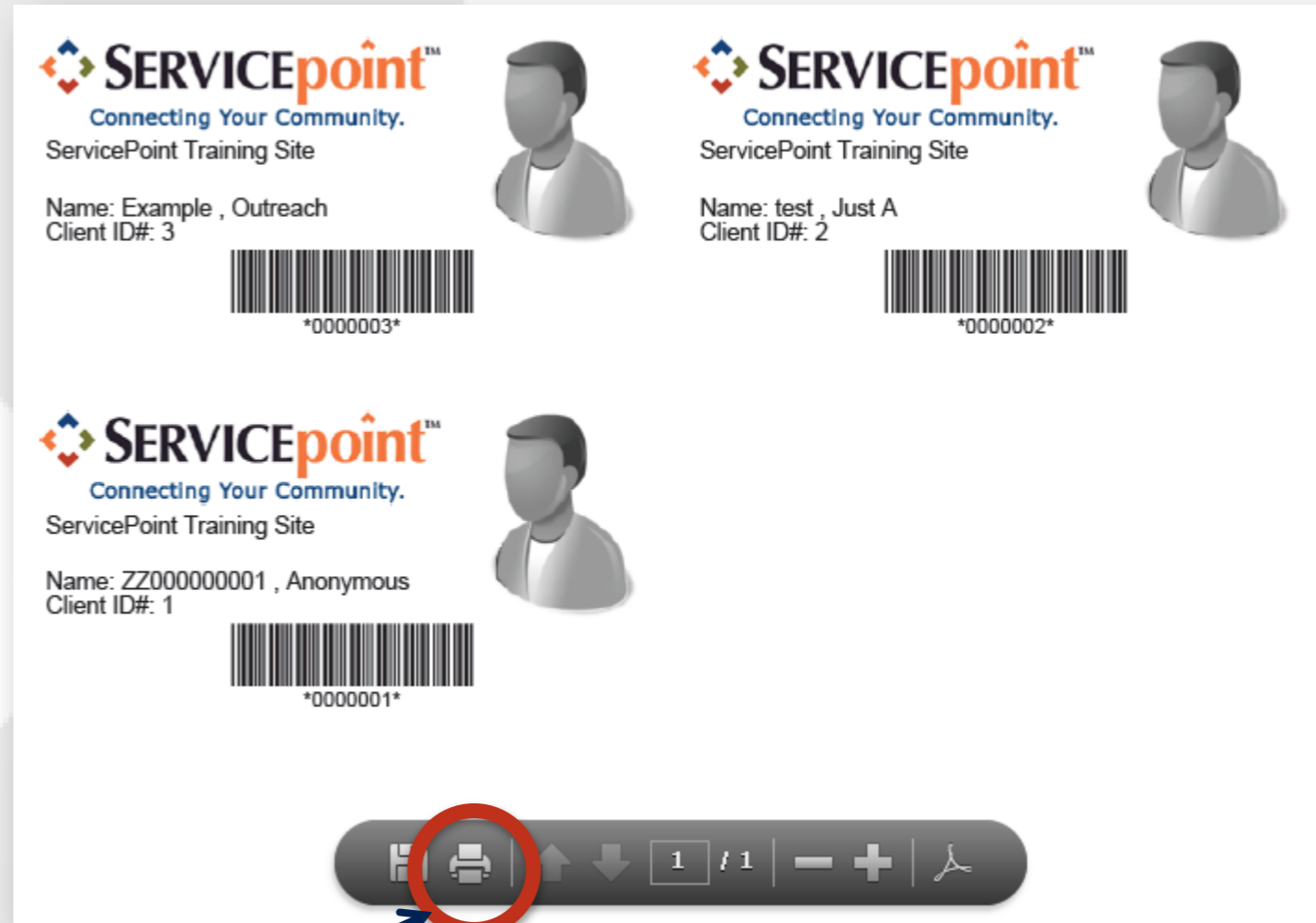


STEP 2: Either select Clients individually (by check-marking the boxes next to their names) OR single left-click on the **Check ALL Clients** button.

STEP 3: Single left-click on the **Print ID Cards for Clients** button.



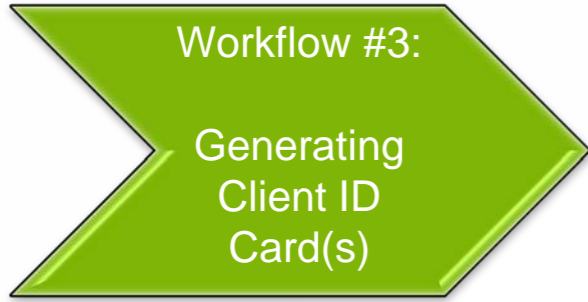
Workflow #3:
Generating Client ID Card(s)



The screenshot displays three Servicepoint client ID cards. Each card features the Servicepoint logo, the tagline 'Connecting Your Community.', and the text 'ServicePoint Training Site'. The first card is for 'Example, Outreach' with Client ID# 3 and a barcode labeled '*000003*'. The second card is for 'test, Just A' with Client ID# 2 and a barcode labeled '*000002*'. The third card is for 'ZZ000000001, Anonymous' with Client ID# 1 and a barcode labeled '*000001*'. At the bottom of the screenshot, a toolbar contains several icons, with the print icon (a printer) circled in red. A blue arrow points from the print icon to a text box below.

STEP 4: Single left-click on the **Print** icon.



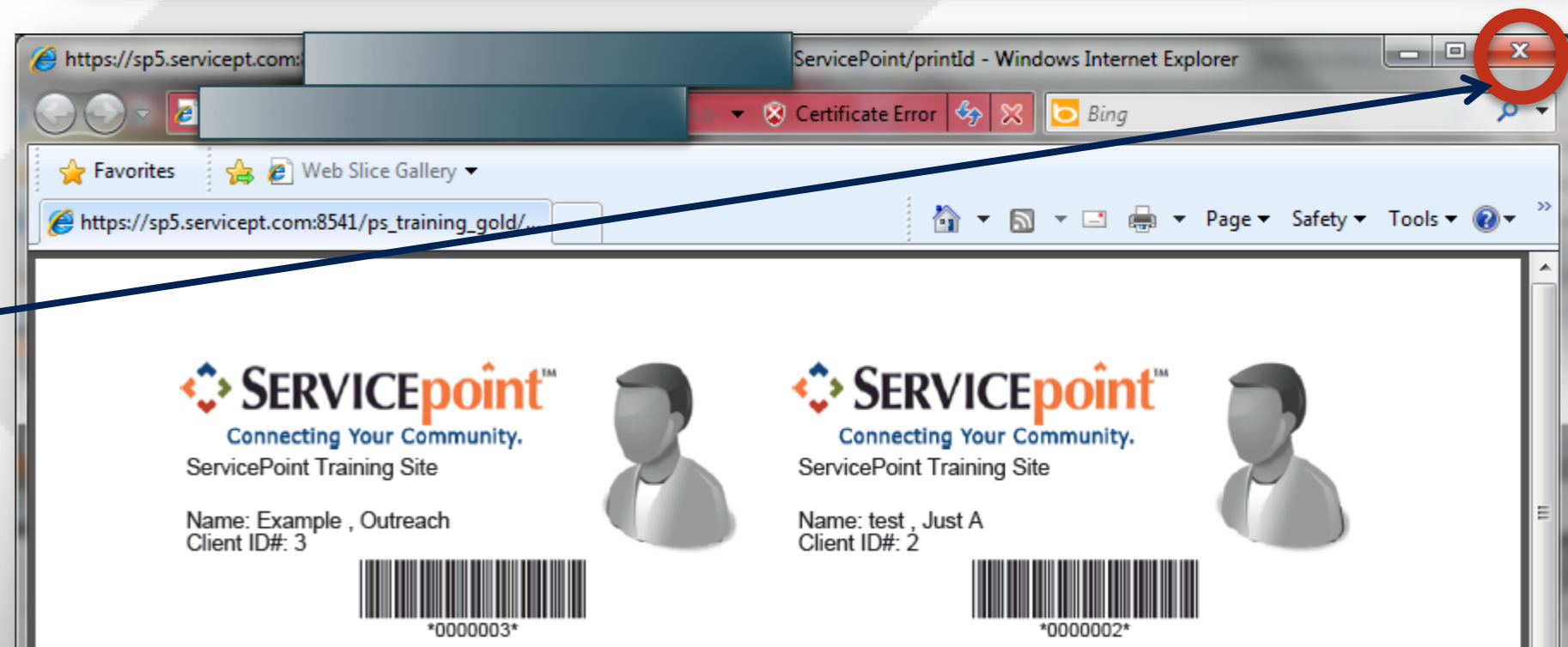


STEP 5: Close the PDF browser window & return to ServicePoint.

NOTE on STEP 5: If using Mozilla Firefox or Google Chrome, single left-click on the **Black X** icon located in the upper-right-hand corner of the browser tab title.



NOTE on STEP 5: If using Internet Explorer, single left-click on the **Red X** icon located in the upper-right-hand corner of the parent browser window, to close the PDF pop-up printing window.

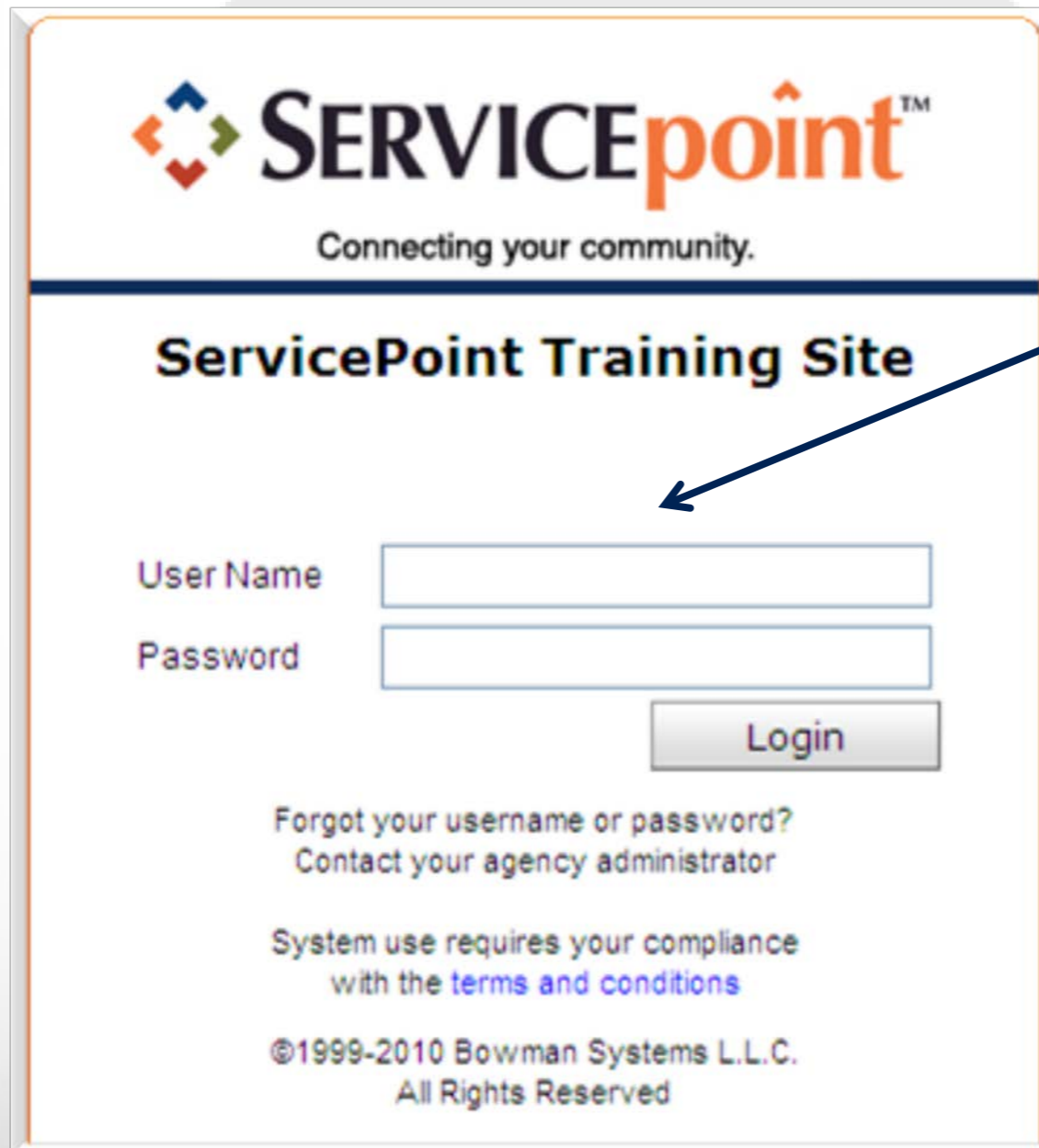


SkanPoint Workflow #4a

Creating Bulk Single-Service Transactions



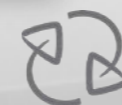
SkanPoint v5.5.1



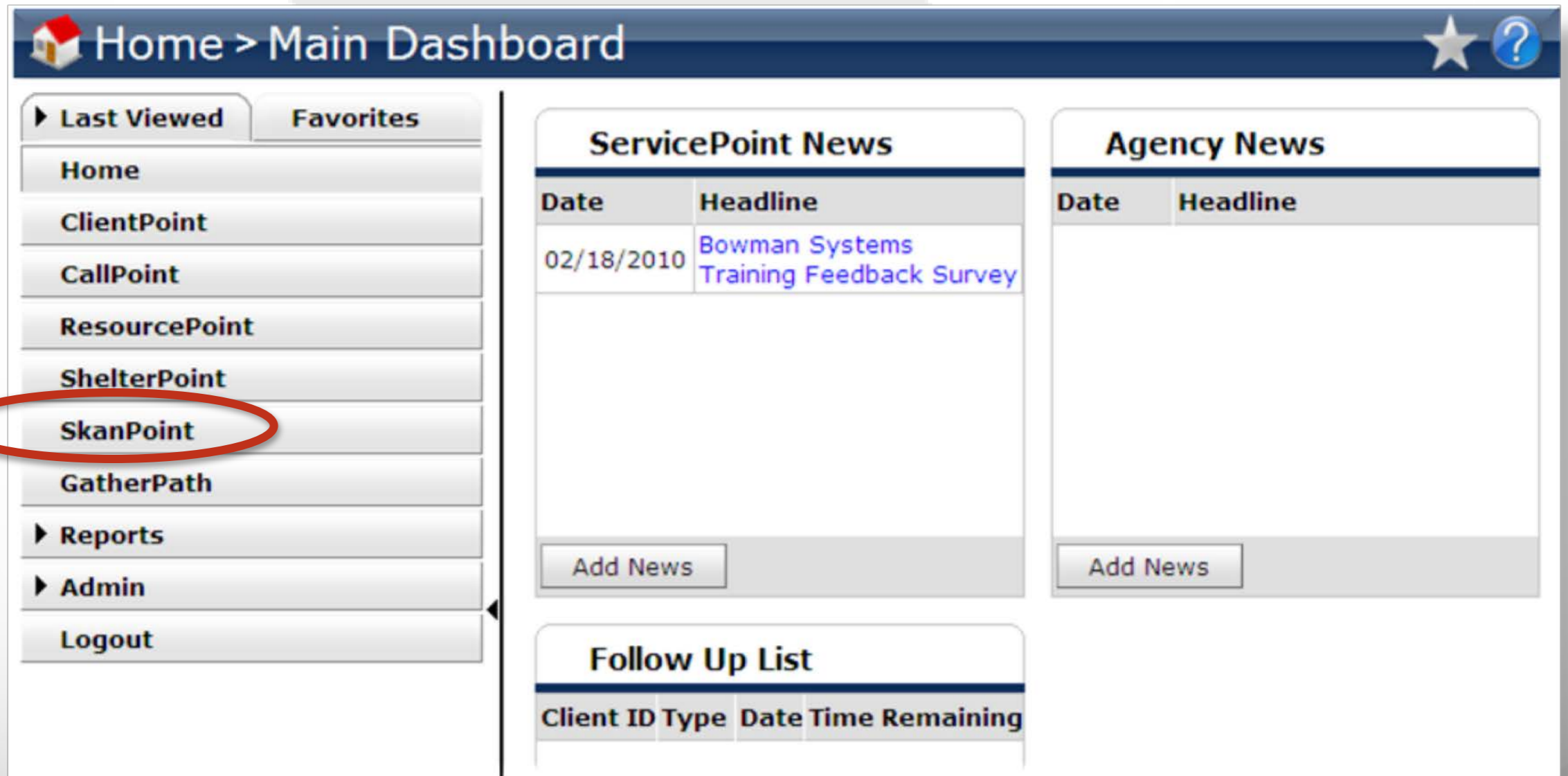
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SkaniPoint v5.5.1



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Home > Main Dashboard

Last Viewed **Favorites**

- Home
- ClientPoint
- CallPoint
- ResourcePoint
- ShelterPoint
- SkaniPoint**
- GatherPath
- ▶ Reports
- ▶ Admin
- Logout

ServicePoint News

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Add News

Agency News

Date	Headline
------	----------

Add News

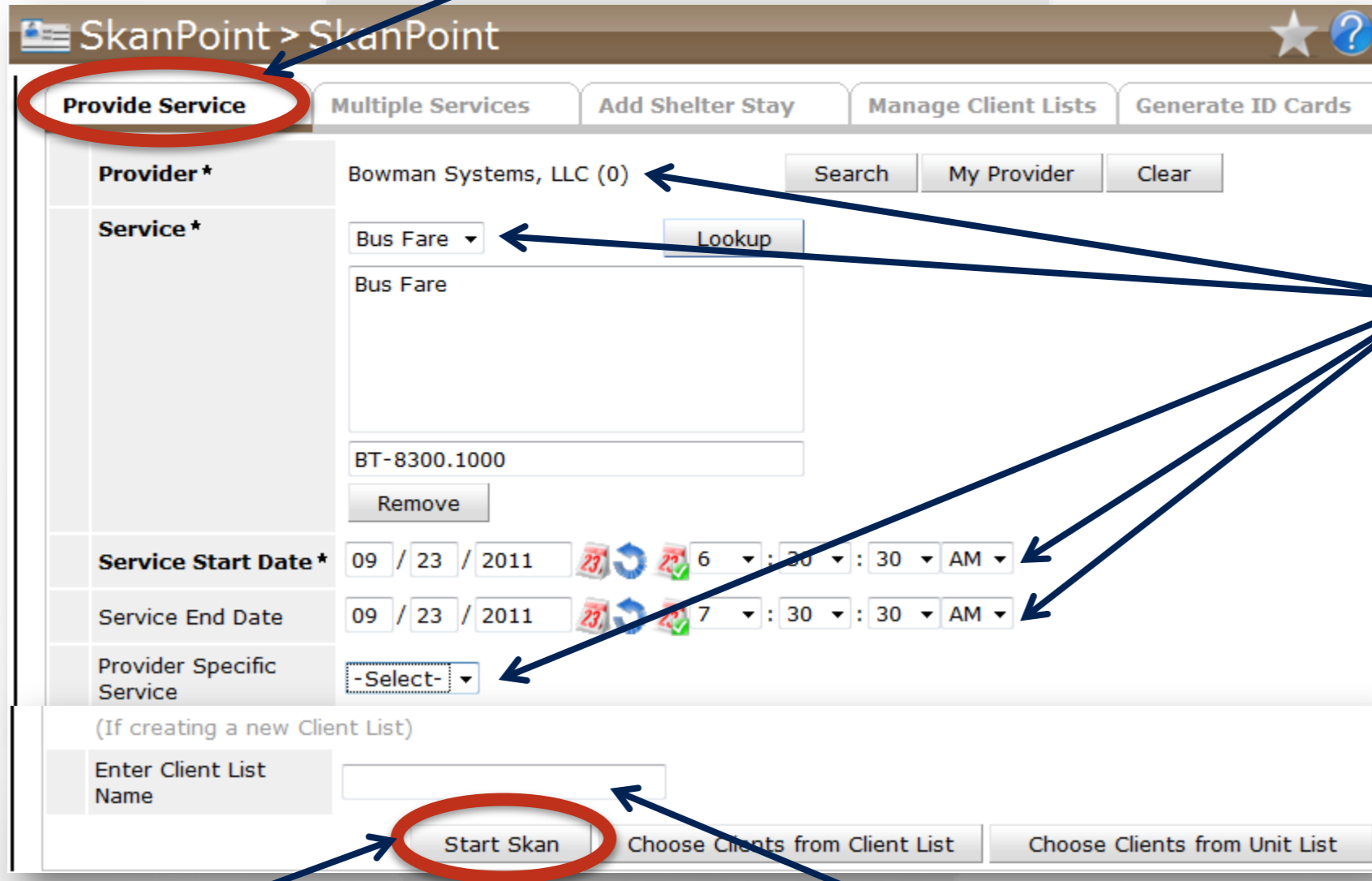
Follow Up List

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #4a:
Creating Bulk
Single-Service
Transactions
(via the "Start
Skan" button)

STEP 1: Start on the **Provide Service** tab.



STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

NOTE on STEP 2: *The service-related fields may differ, based on your Provider's settings & service configurations.*

STEP 3: To work from a new (possibly one-time-use) Client List, click the **Start Skan** button.

NOTE on STEP 3: *Input a Client List Name, before clicking the Start Skan button, if you plan to use the new list again soon.*



Workflow #4a:
Creating Bulk
Single-Service
Transactions
(via the "Start
Skan" button)

Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name: First, Middle, Last, Suffix
Alias
Social Security Number
Social Security Number Data Quality
Exact Match
Search ACTIVE Clients
Search INACTIVE / DELETED Clients
Search ALL Clients

Date of Birth
DOB Data Quality
Gender
Primary Race
Secondary Race
Ethnicity

Search Clear

Skan Client Bar Code

Skan Code **Skan Bar Code**

Clients Entered

Clients Entered

ID	Client	Alias	Social Security Number
Remove Last Entry			

Enter Service for Clients | Enter Service & Create New Session | Cancel

STEP 4: Locate the Client(s) you wish to give a Service Record, by using either a First & Last Name, Alias, or SSN. Then click the **Search** button. When a list of possible matches appears, click the **Green Plus** icon next to the desired Client's name to add the Client to the list of Service Recipients.

~ OR ~




Locate the Client(s) you wish to give a Service Record by typing each respective Client's ID Number into the **Skan Code** field, and then click the **Skan Bar Code** button. *Using a barcode scanner will automatically complete this function.*

NOTE on STEP 4: Selected Clients will appear at the bottom of the screen under the **Clients Entered** section.



Workflow #4a:
 Creating Bulk
 Single-Service
 Transactions
 (via the "Start
 Skan" button)

Additional NOTE on STEP 4: Clients that were incorrectly added to the list can easily be removed by single-left-clicking the **Red Minus Icon** to delete individual names, one-at-a-time.

Clients Entered			
ID	Client	Alias	Social Security Number
 3	Example, Outreach		
 2	test, Just A		888-88-8888
 1	ZZ000000001, Anonymous		

Remove Last Entry Showing 1-3 of 3

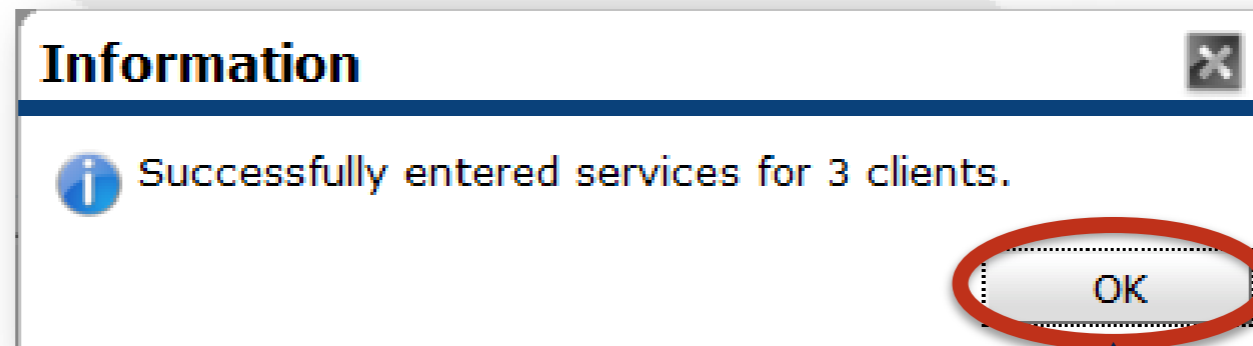
Enter Service for Clients Enter Service & Create New Session Cancel

STEP 5: After all necessary Clients have been added to the list, click the **Enter Service for Clients** or the **Enter Service & Create New Session** button.

NOTE on STEP 5: Use the **Enter Service for Clients** button if you intend to input additional similar Service Records for a different group of Clients. (Your existing Service Transaction data will be retained.) Otherwise, use the **Enter Service & Create New Session** button if you intend to input additional Service Records which are in no-way similar to your current Service Transaction data. (The **Provide Service** screen will essentially be "wiped clean" for future use.)



Workflow #4a:
Creating Bulk
Single-Service
Transactions
(via the "Start
Skan" button)

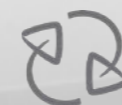
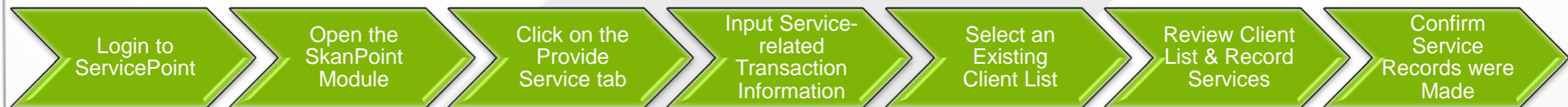


STEP 6: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

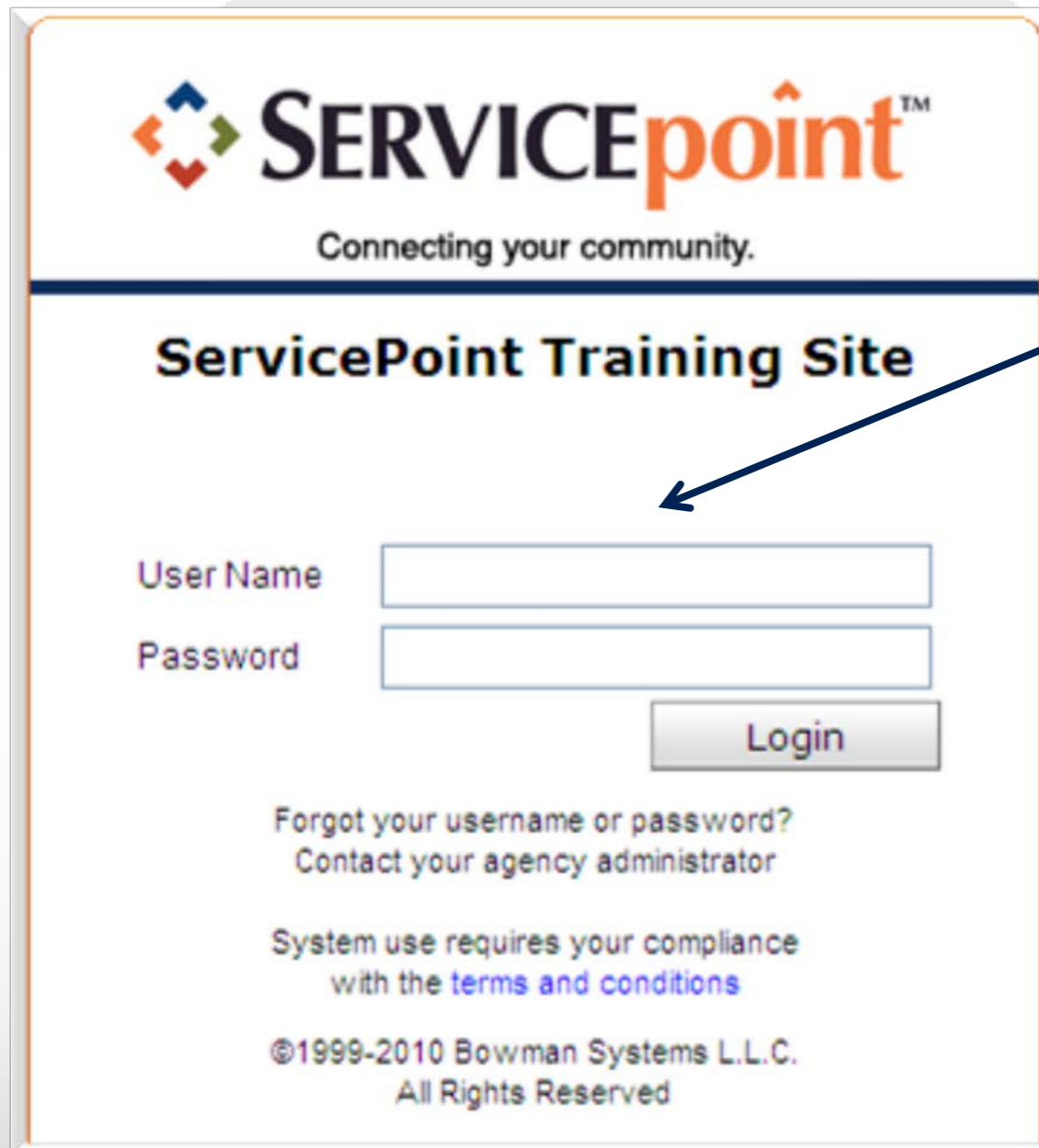


SkanPoint Workflow #4b

Creating Bulk Single-Service Transactions



SkanPoint v5.5.1



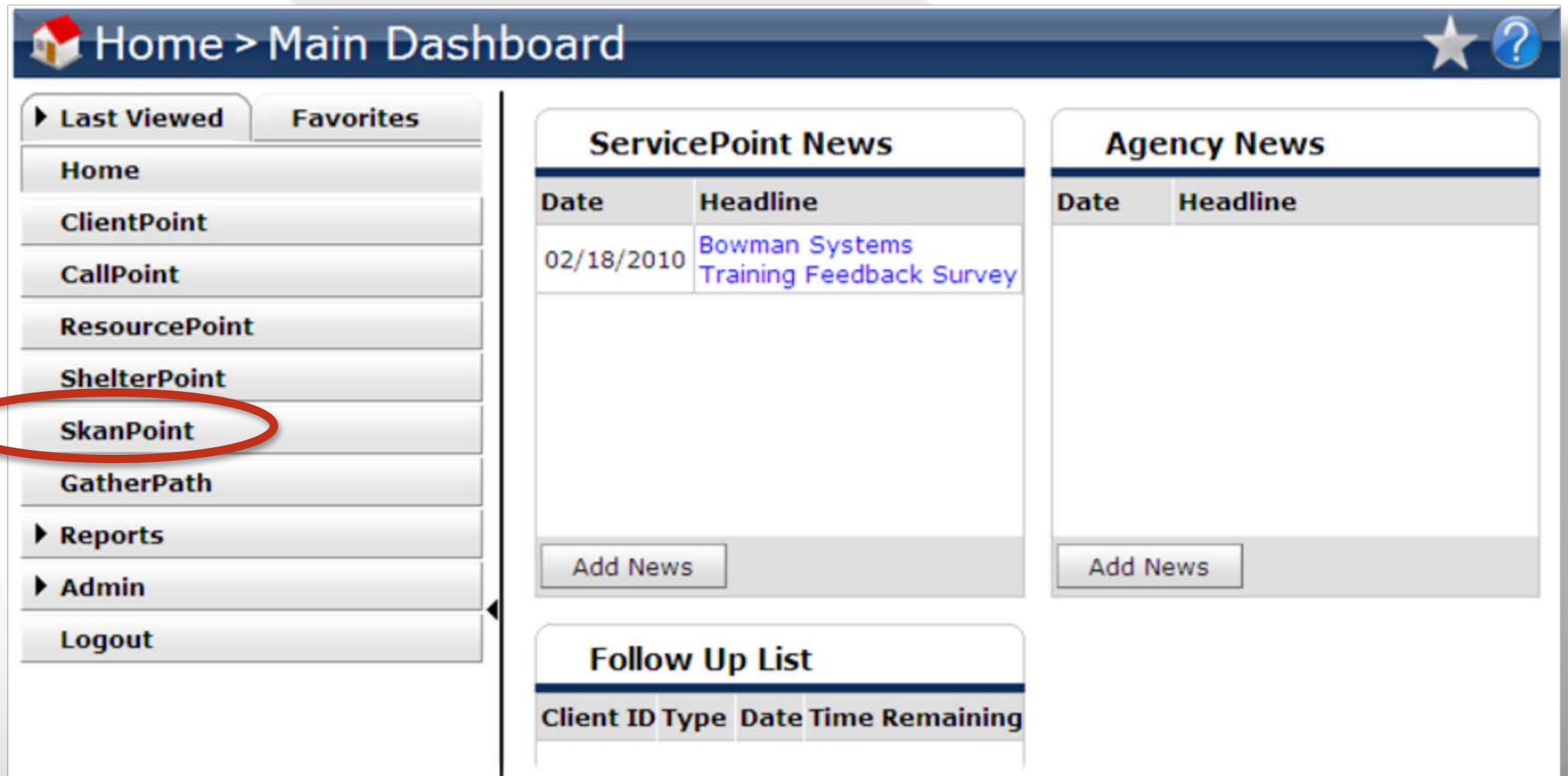
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

Begin by logging into *ServicePoint*® using your assigned Username & Password.

Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint*®.



SkaniPoint v5.5.1

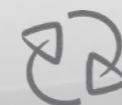


The screenshot shows the 'Main Dashboard' interface. On the left is a navigation sidebar with a 'Last Viewed' tab and a 'Favorites' tab. The 'Last Viewed' list includes: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, SkaniPoint (circled in red), GatherPath, Reports, Admin, and Logout. The main content area is divided into three sections: 'ServicePoint News', 'Agency News', and 'Follow Up List'. 'ServicePoint News' contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. 'Agency News' is currently empty. 'Follow Up List' has a header with columns: Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

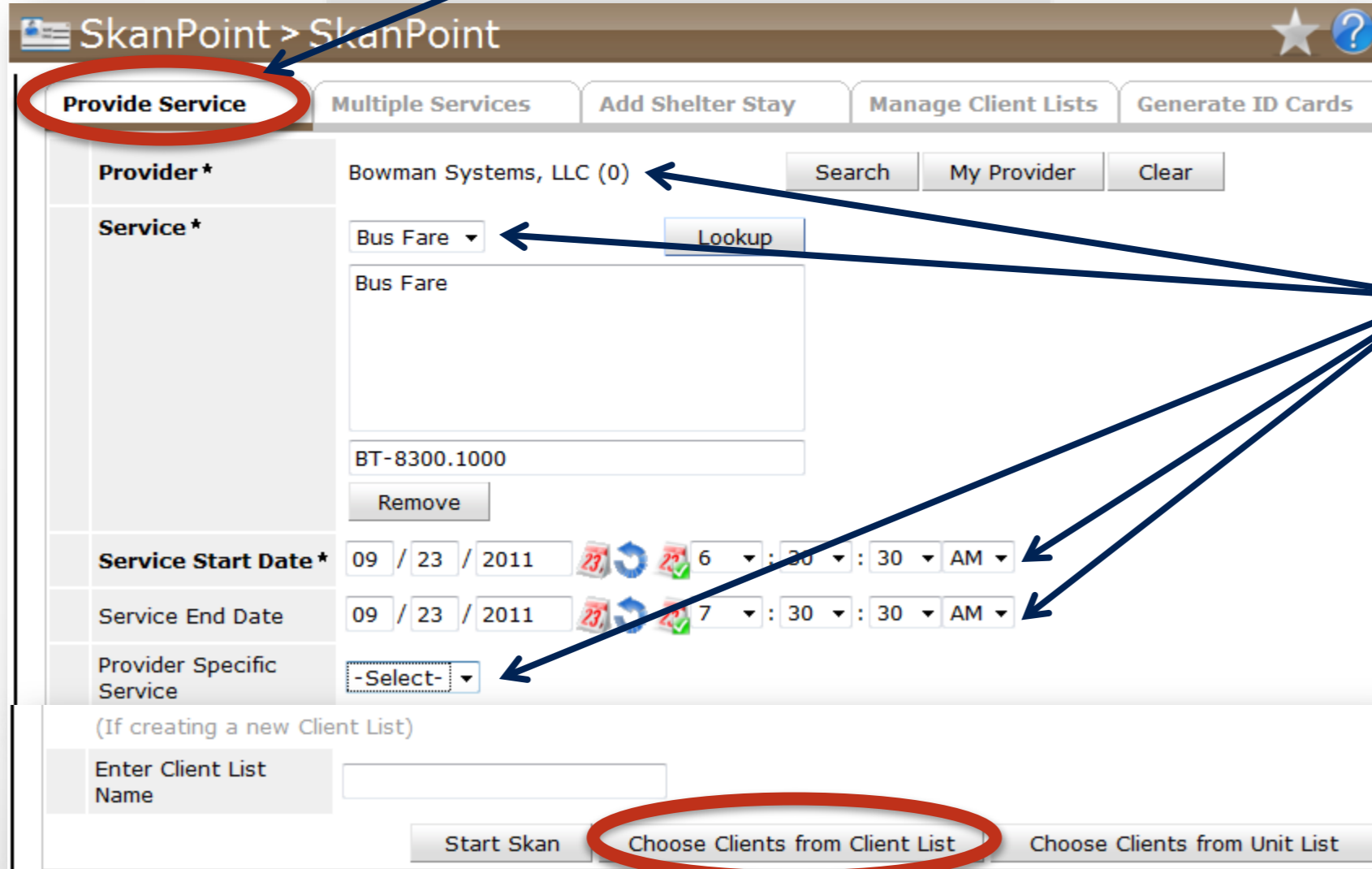
Date	Headline
------	----------

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #4b:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Client
List" button)

STEP 1: Start on the **Provide Service** tab.



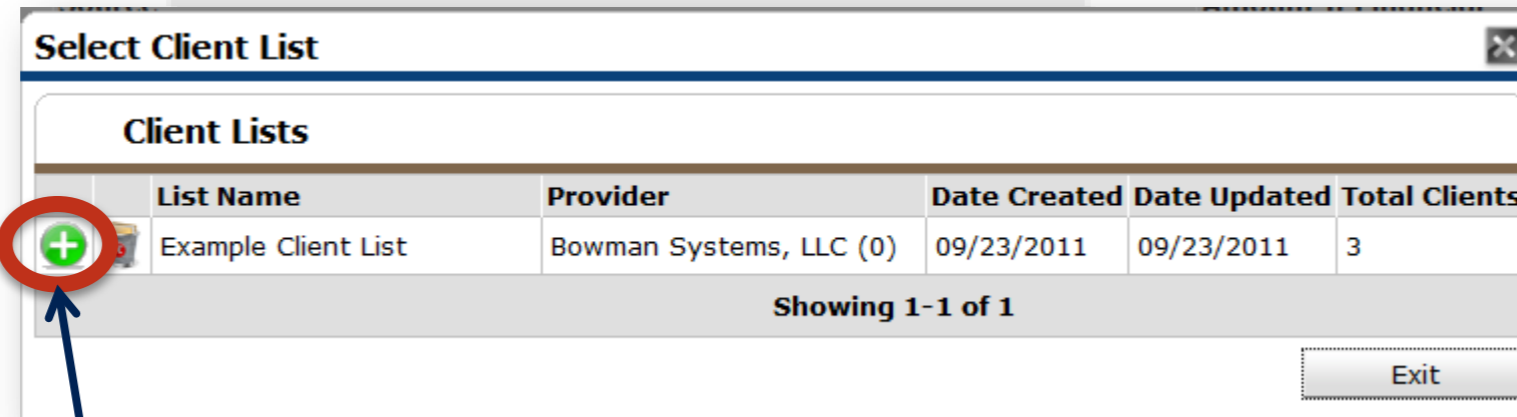
STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

NOTE on STEP 2: *The service-related fields may differ, based on your Provider's settings & service configurations.*

STEP 3: To work from an existing Client List, click the **Choose Clients from Client List** button.



Workflow #4b:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Client
List" button)

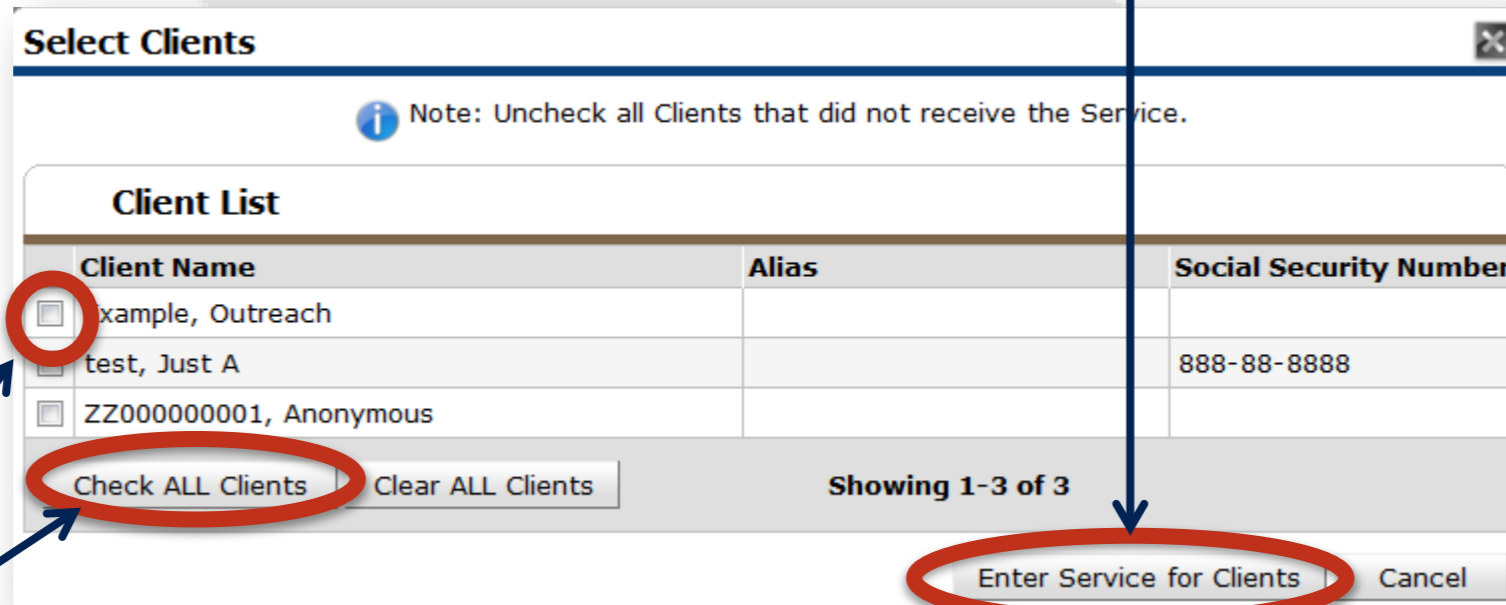


STEP 4: A pop-up window will appear, displaying the existing Client Lists that can be used. When a suitable list is found, click the **Green Plus** icon next to the desired Client List's name to select it.



Workflow #4b:
 Creating Bulk
 Single-Service
 Transactions (via
 the "Choose
 Clients from Client
 List" button)

STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.



Client Name	Alias	Social Security Number
<input checked="" type="checkbox"/> Example, Outreach		
<input type="checkbox"/> test, Just A		888-88-8888
<input type="checkbox"/> ZZ000000001, Anonymous		

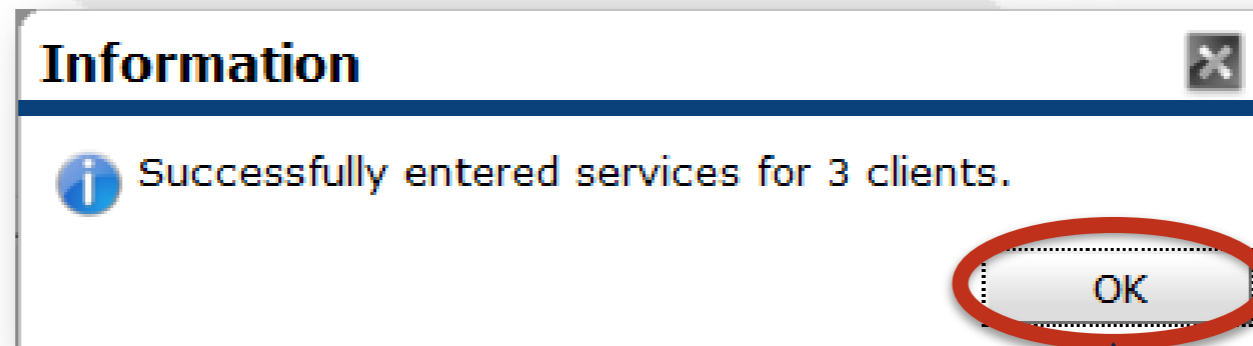
Showing 1-3 of 3

Check ALL Clients Clear ALL Clients Enter Service for Clients Cancel

STEP 5: Select the desired Clients by either check-marking the boxes next to each individual Client's name (with a single-left-click of the mouse), or by single-left-clicking the **Check ALL Clients** button. Clients can be "un-selected" by removing the check-mark next to their individual names (again with a single-left-click of the mouse).



Workflow #4b:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Client
List" button)

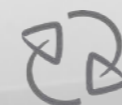
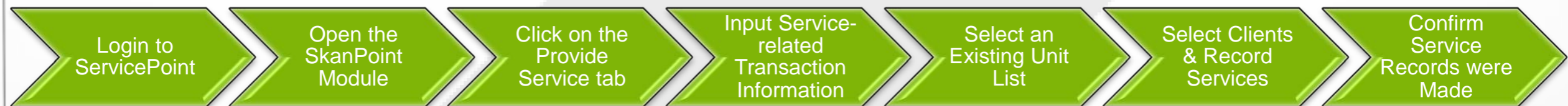


STEP 7: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

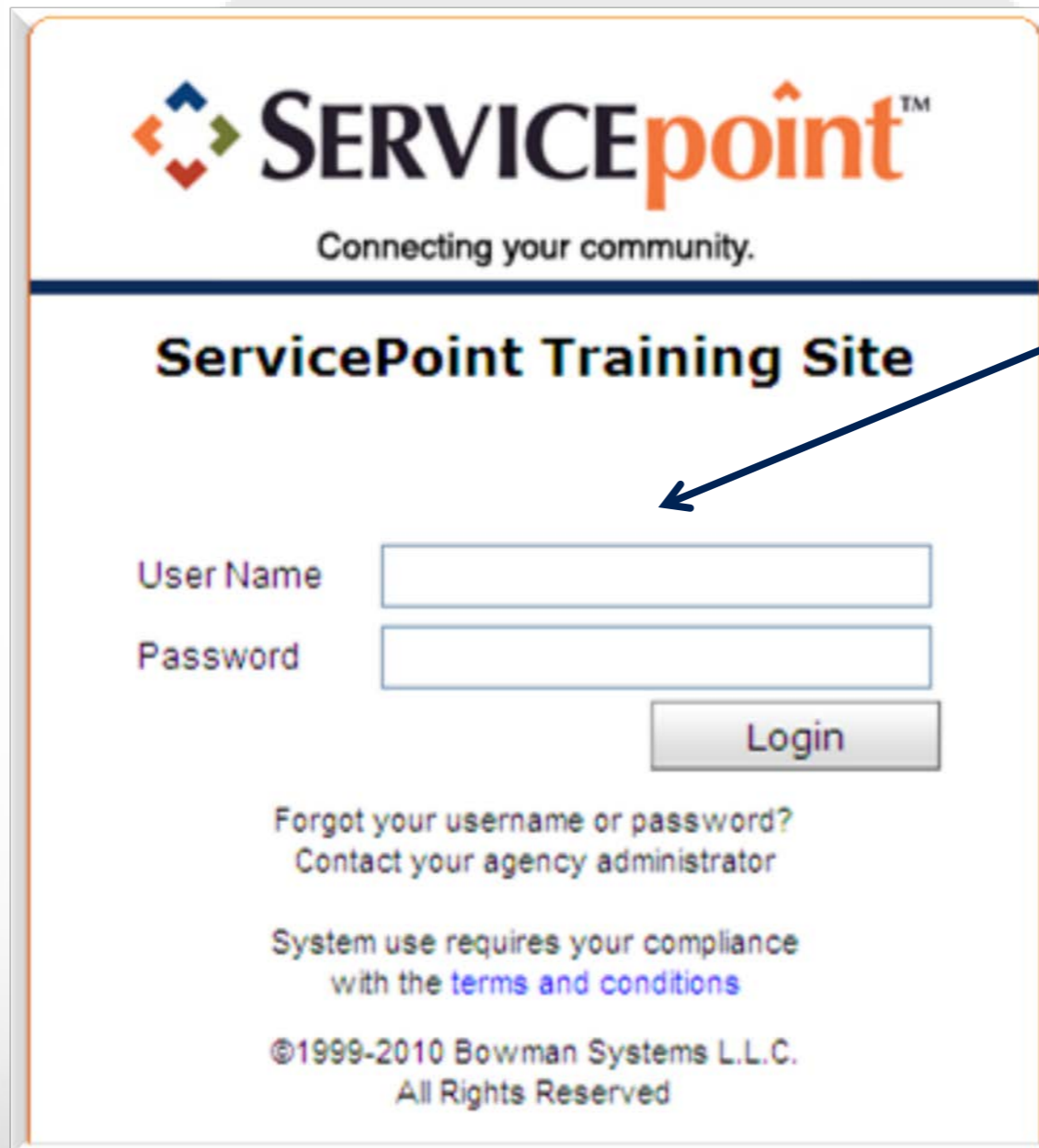


SkanPoint Workflow #4c

Creating Bulk Single-Service Transactions



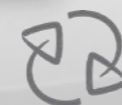
SkanPoint v5.5.1



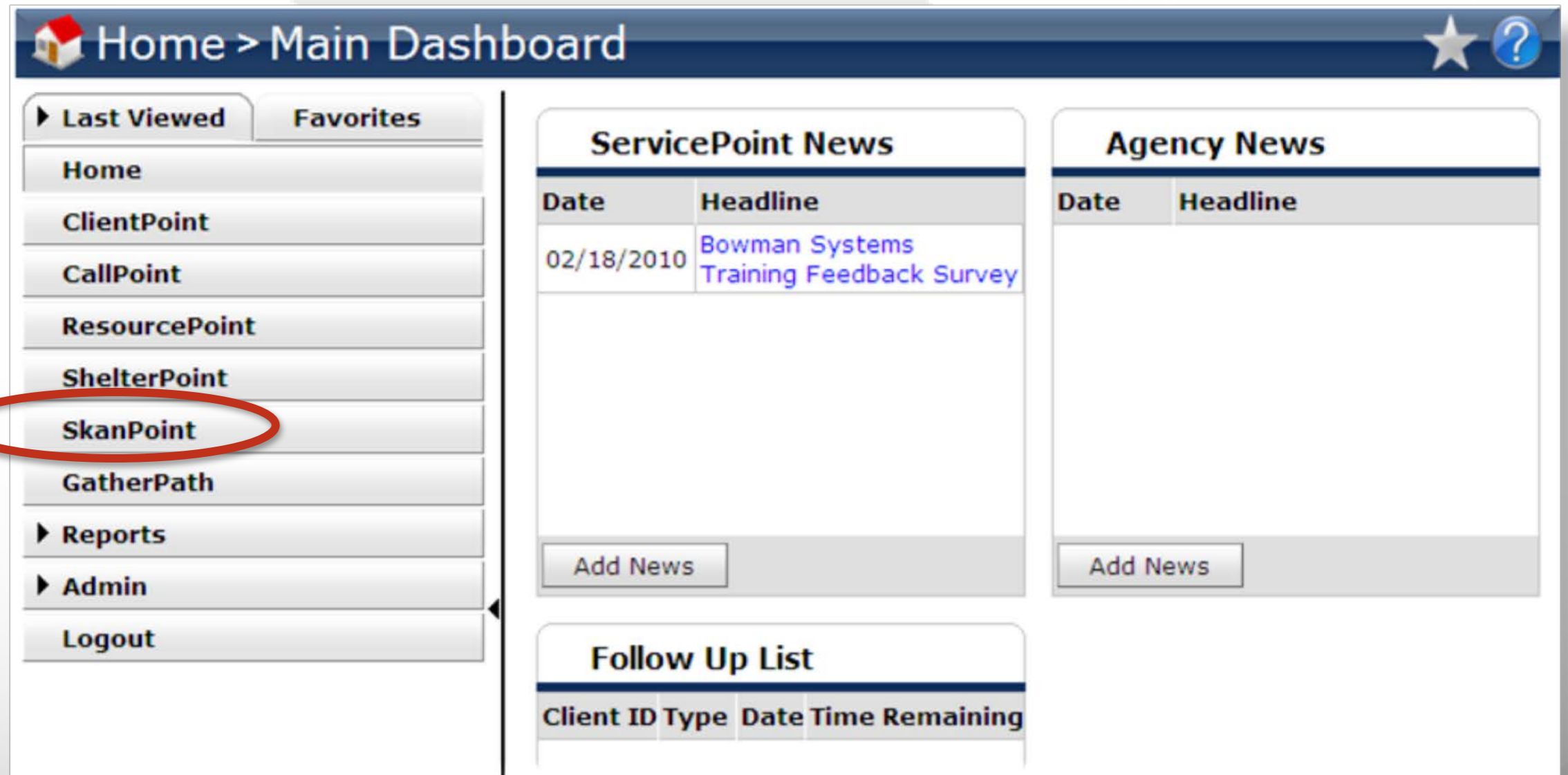
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation sidebar with a 'Last Viewed' tab and a 'Favorites' tab. The 'Last Viewed' list includes: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, **SkaniPoint** (circled in red), GatherPath, Reports, Admin, and Logout. The main content area is divided into three sections: 'ServicePoint News', 'Agency News', and 'Follow Up List'. 'ServicePoint News' contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. 'Agency News' is currently empty. 'Follow Up List' has a header with columns: Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

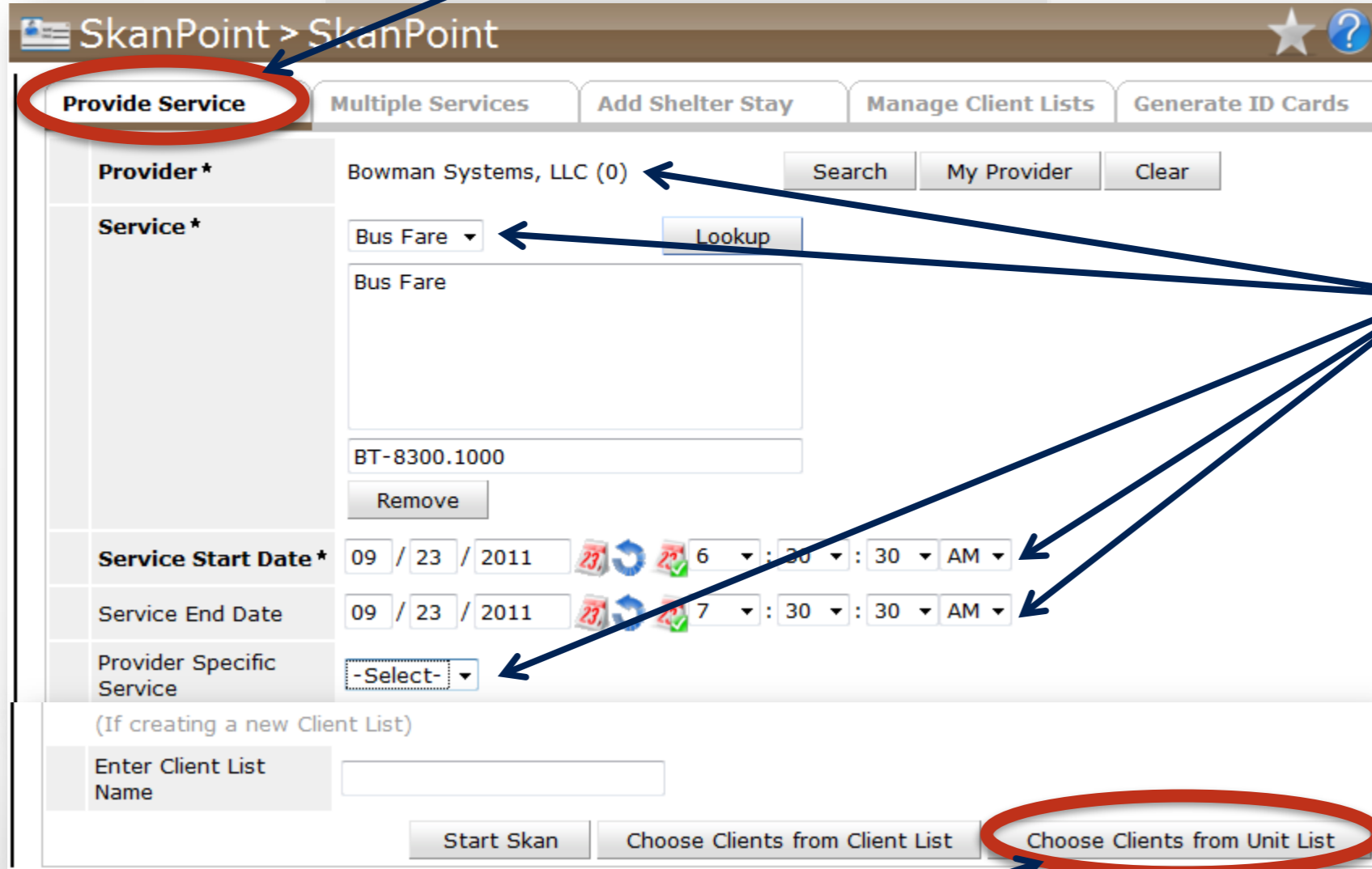
Date	Headline
------	----------

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #4c:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Unit
List" button)

STEP 1: Start on the **Provide Service** tab.



Provide Service Multiple Services Add Shelter Stay Manage Client Lists Generate ID Cards

Provider * Bowman Systems, LLC (0) Search My Provider Clear

Service * Bus Fare Lookup

Bus Fare

BT-8300.1000 Remove

Service Start Date * 09 / 23 / 2011 6 : 30 : 30 AM

Service End Date 09 / 23 / 2011 7 : 30 : 30 AM

Provider Specific Service -Select-

(If creating a new Client List)

Enter Client List Name

Start Skan Choose Clients from Client List **Choose Clients from Unit List**

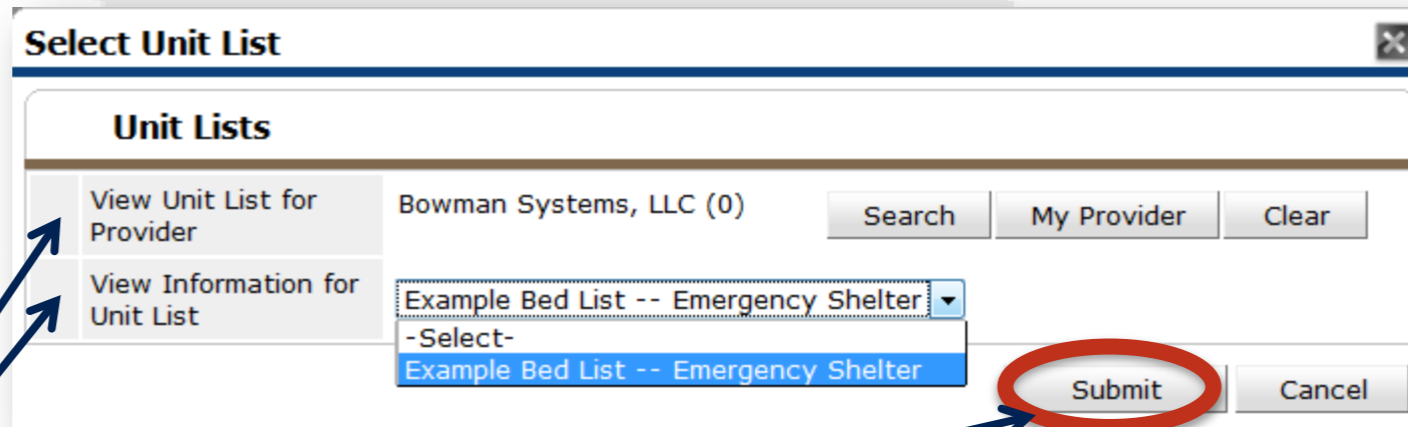
STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

NOTE on STEP 2: *The service-related fields may differ, based on your Provider's settings & service configurations.*

STEP 3: To work from an existing Unit List, click the **Choose Clients from Unit List** button.



Workflow #4c:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Unit
List" button)



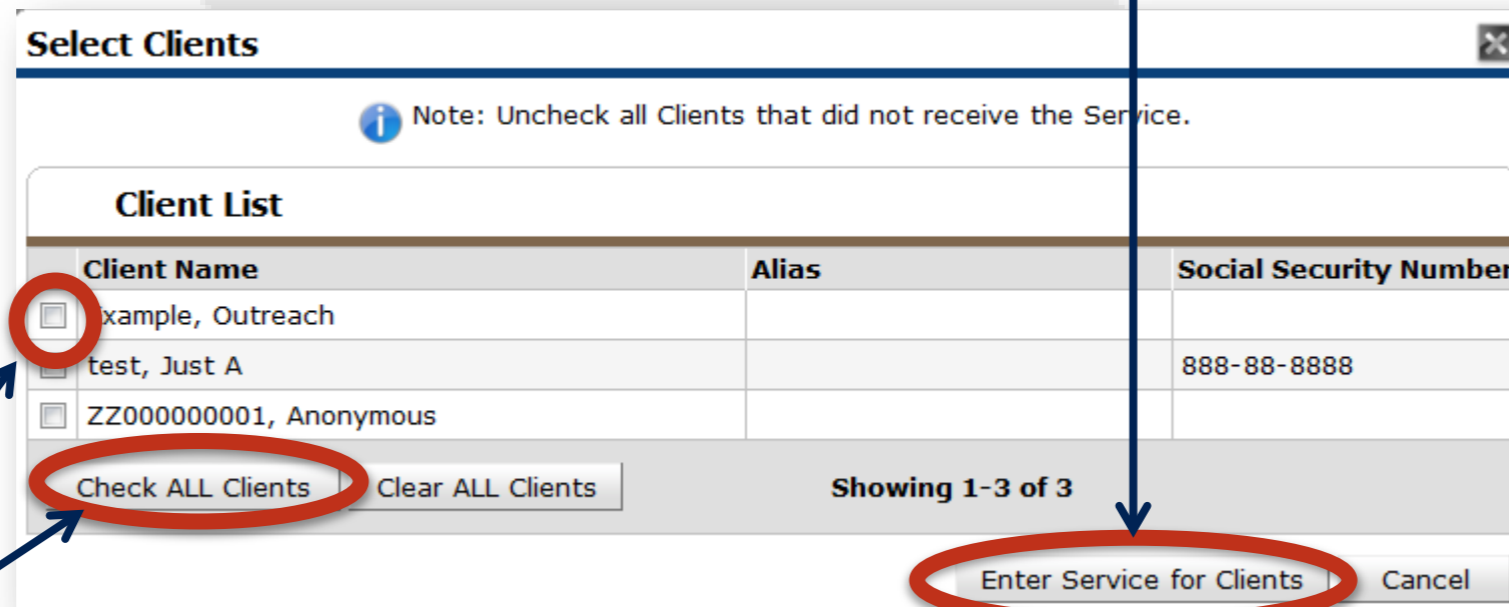
Unit Lists	
View Unit List for Provider	Bowman Systems, LLC (0) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
View Information for Unit List	<input type="text" value="Example Bed List -- Emergency Shelter"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/>

STEP 4: Select a **Unit List Provider**, then select a **Unit List** for the Provider, then click the **Submit** button.



Workflow #4c:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Unit
List" button)

STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.

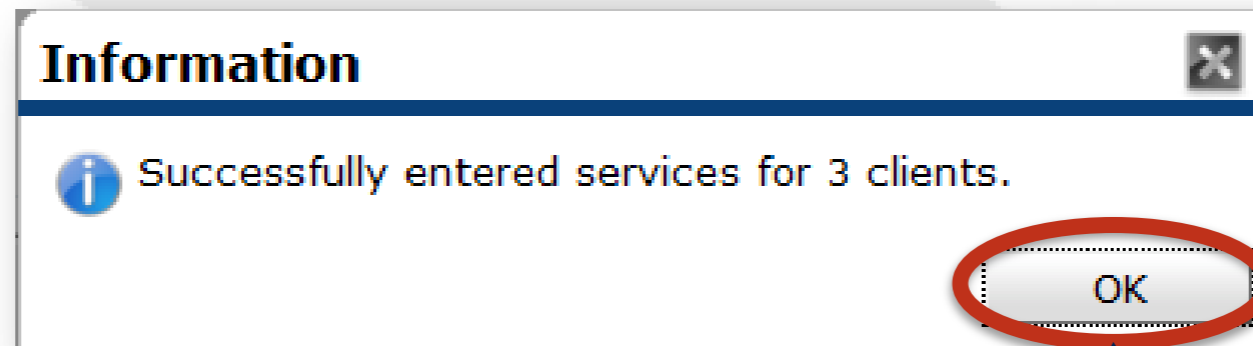


Client Name	Alias	Social Security Number
Example, Outreach		
test, Just A		888-88-8888
ZZ000000001, Anonymous		

STEP 5: Select the desired Clients by either check-marking the boxes next to each individual Client's name (with a single-left-click of the mouse), or by single-left-clicking the **Check ALL Clients** button. Clients can be "un-selected" by removing the check-mark next to their individual names (again with a single-left-click of the mouse).



Workflow #4c:
Creating Bulk
Single-Service
Transactions (via
the "Choose
Clients from Unit
List" button)



STEP 7: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

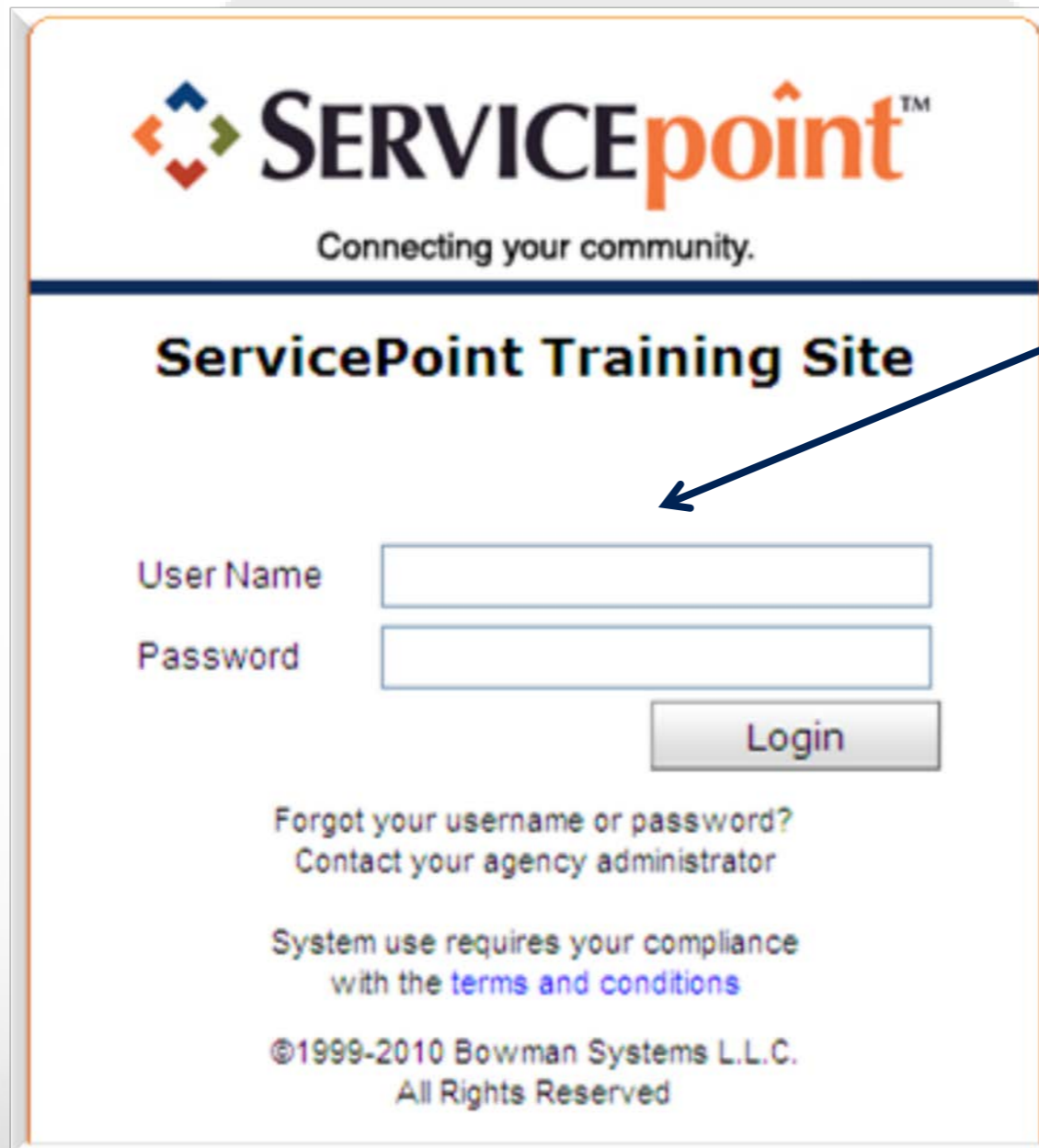


SkanPoint Workflow #5a

Creating Bulk Multiple-Service Transactions



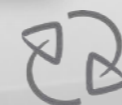
SkanPoint v5.5.1



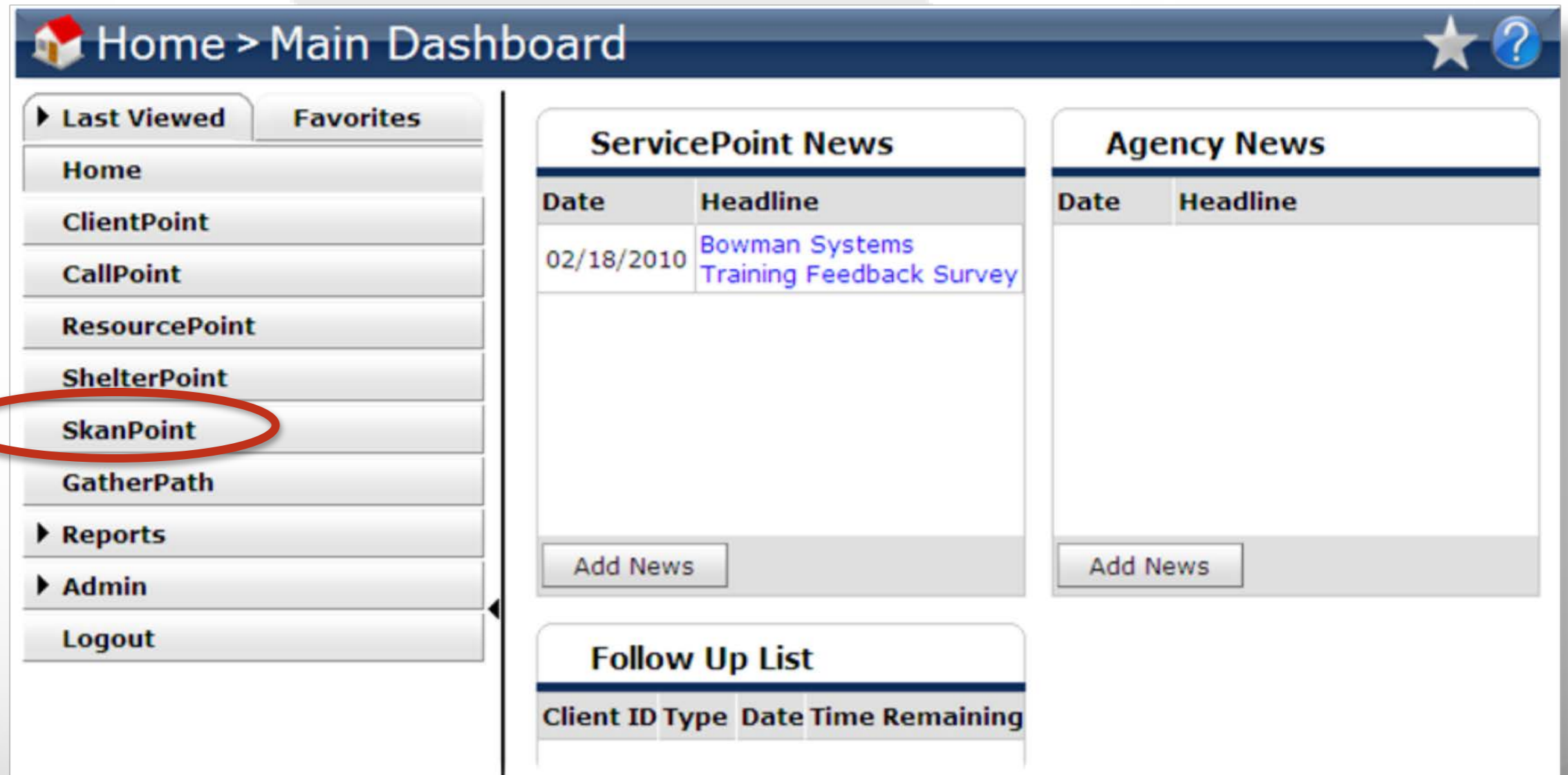
The screenshot shows the login interface for the ServicePoint Training Site. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form includes two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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SkaniPoint v5.5.1



Home > Main Dashboard

Last Viewed **Favorites**

- Home
- ClientPoint
- CallPoint
- ResourcePoint
- ShelterPoint
- SkaniPoint**
- GatherPath
- ▶ Reports
- ▶ Admin
- Logout

ServicePoint News

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Add News

Agency News

Date	Headline
------	----------

Add News

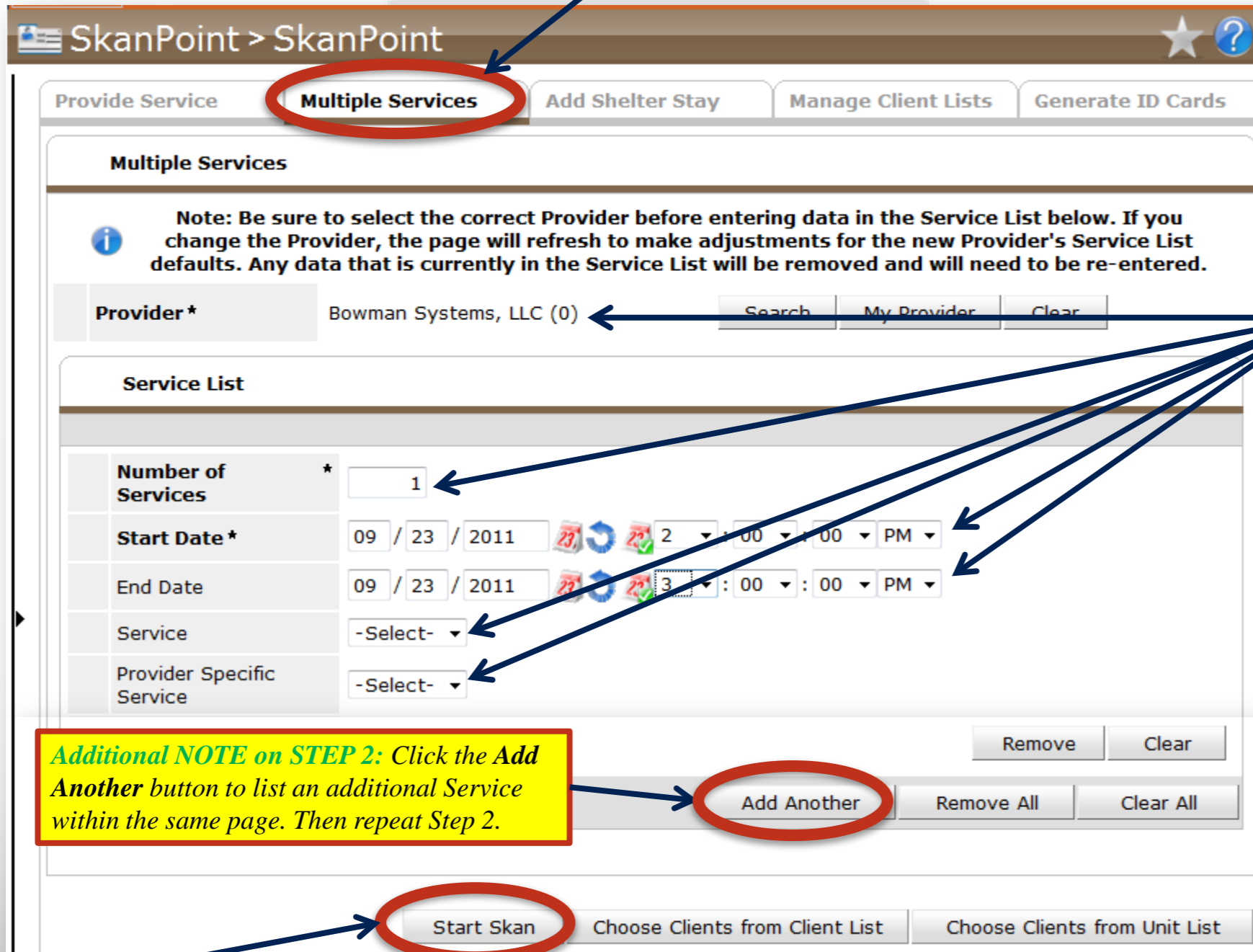
Follow Up List

Client ID	Type	Date	Time Remaining
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Workflow #5a:
Creating Bulk
Multiple-Service
Transactions (via
the "Start Skan"
button)

STEP 1: Start on the **Multiple Services** tab.



The screenshot shows the SkanPoint web application interface. At the top, there are navigation tabs: "Provide Service", "Multiple Services" (circled in red), "Add Shelter Stay", "Manage Client Lists", and "Generate ID Cards". Below the tabs is a "Multiple Services" section with a note: "Note: Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered." Below the note is a "Provider*" field with "Bowman Systems, LLC (0)" selected. Below that is a "Service List" table with the following fields: "Number of Services" (value: 1), "Start Date" (09 / 23 / 2011), "End Date" (09 / 23 / 2011), "Service" (-Select-), and "Provider Specific Service" (-Select-). At the bottom of the form are buttons: "Remove", "Clear", "Add Another" (circled in red), "Remove All", and "Clear All". At the very bottom of the page is a "Start Skan" button (circled in red), along with "Choose Clients from Client List" and "Choose Clients from Unit List" buttons.

STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

Additional NOTE on STEP 2: Click the **Add Another** button to list an additional Service within the same page. Then repeat Step 2.

NOTE on STEP 2: The service-related fields may differ, based on your Provider's settings & service configurations.

STEP 3: To work from a new (possibly one-time-use) Client List, click the **Start Skan** button.



Workflow #5a:
Creating Bulk
Multiple-Service
Transactions (via
the "Start Skan"
button)

STEP 4: Locate the Client(s) you wish to give a Service Record, by using either a First & Last Name, Alias, or SSN. Then click the **Search** button. When a list of possible matches appears, click the **Green Plus** icon next to the desired Client's name to add the Client to the list of Service Recipients.

~ OR ~




Locate the Client(s) you wish to give a Service Record by typing each respective Client's ID Number into the **Skan Code** field, and then click the **Skan Bar Code** button. *Using a barcode scanner will automatically complete this function.*

NOTE on STEP 4: Selected Clients will appear at the bottom of the screen under the **Clients Entered** section.



Workflow #5a:
 Creating Bulk
 Multiple-Service
 Transactions (via
 the "Start Skan"
 button)

Additional NOTE on STEP 4: Clients that were incorrectly added to the list can easily be removed by single-left-clicking the **Red Minus Icon** to delete individual names, one-at-a-time.

Clients Entered			
ID	Client	Alias	Social Security Number
 3	Example, Outreach		
 2	test, Just A		888-88-8888
 1	ZZ000000001, Anonymous		

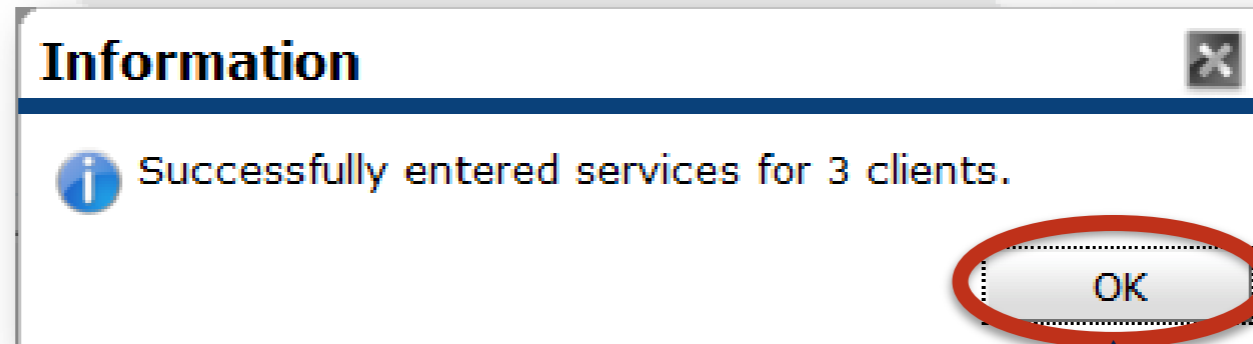
Remove Last Entry Showing 1-3 of 3

STEP 5: After all necessary Clients have been added to the list, click the **Enter Service for Clients** or the **Enter Service & Create New Session** button.

NOTE on STEP 5: Use the **Enter Service for Clients** button if you intend to input additional similar Service Records for a different group of Clients. (Your existing Service Transaction data will be retained.) Otherwise, use the **Enter Service & Create New Session** button if you intend to input additional Service Records which are in no-way similar to your current Service Transaction data. (The **Provide Service** screen will essentially be "wiped clean" for future use.)



Workflow #5a:
Creating Bulk
Multiple-Service
Transactions (via
the "Start Skan"
button)

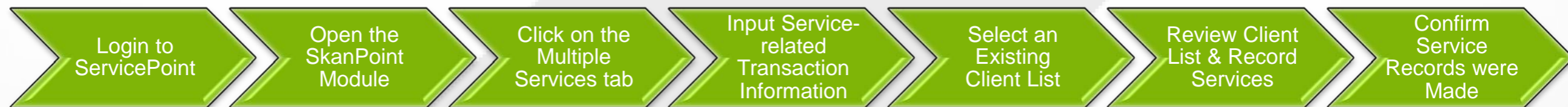


STEP 6: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

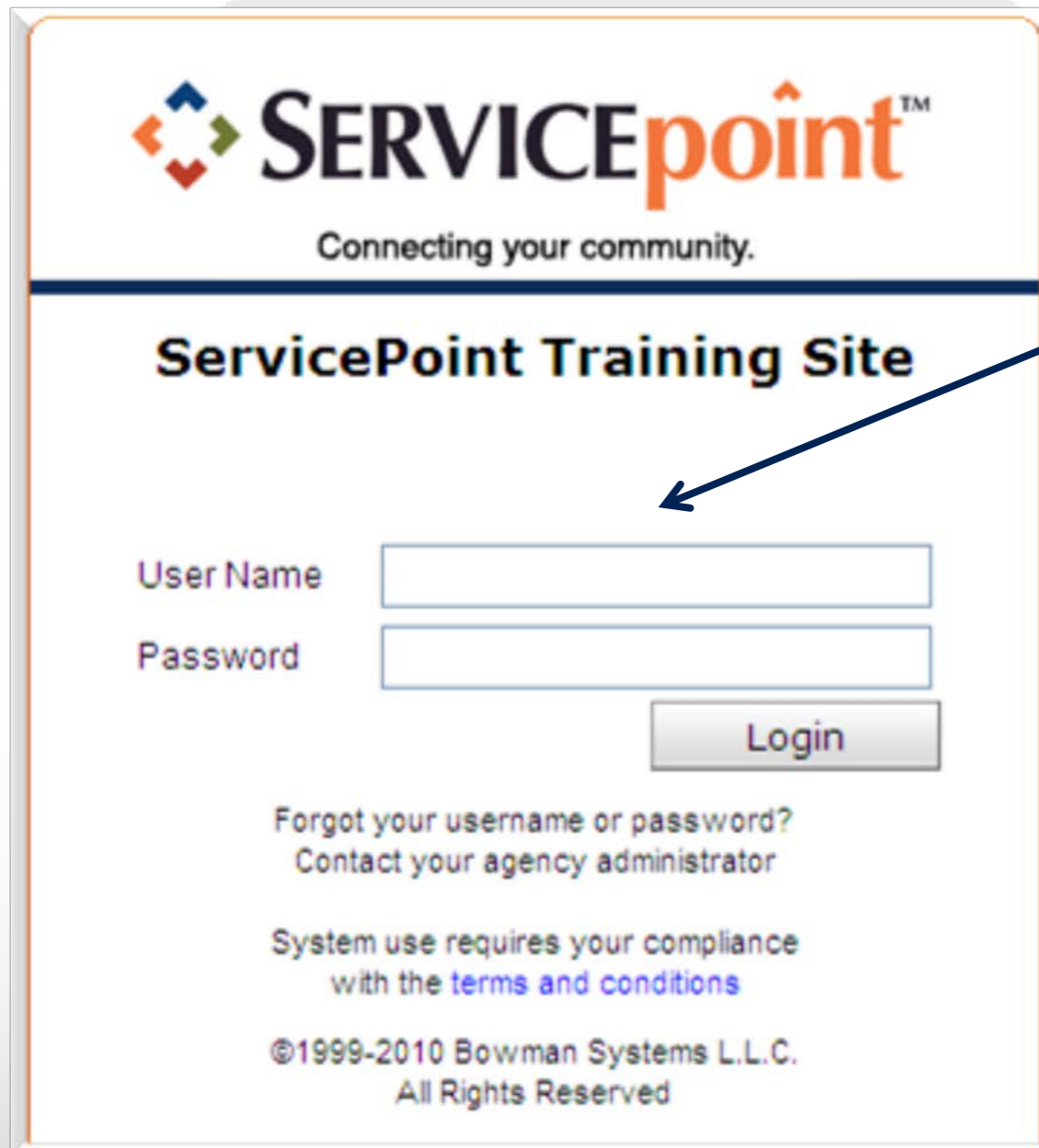


SkanPoint Workflow #5b

Creating Bulk Multiple-Service Transactions



SkanPoint v5.5.1



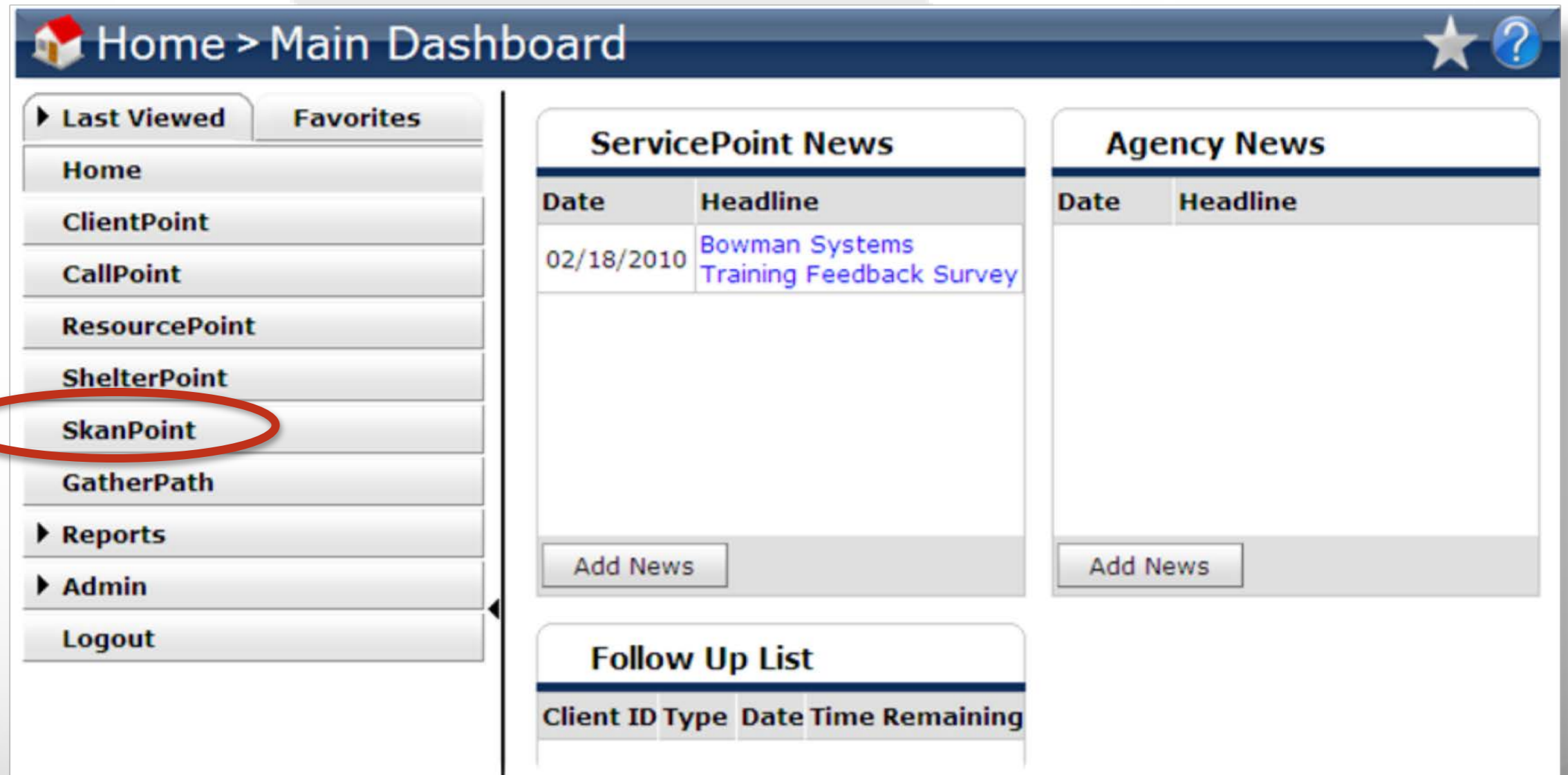
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation sidebar with a 'Last Viewed' tab and a 'Favorites' tab. The 'Last Viewed' list includes: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, SkaniPoint (circled in red), GatherPath, Reports, Admin, and Logout. The main content area is divided into three sections: 'ServicePoint News', 'Agency News', and 'Follow Up List'. 'ServicePoint News' contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. 'Agency News' is currently empty. 'Follow Up List' has a header with columns: Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

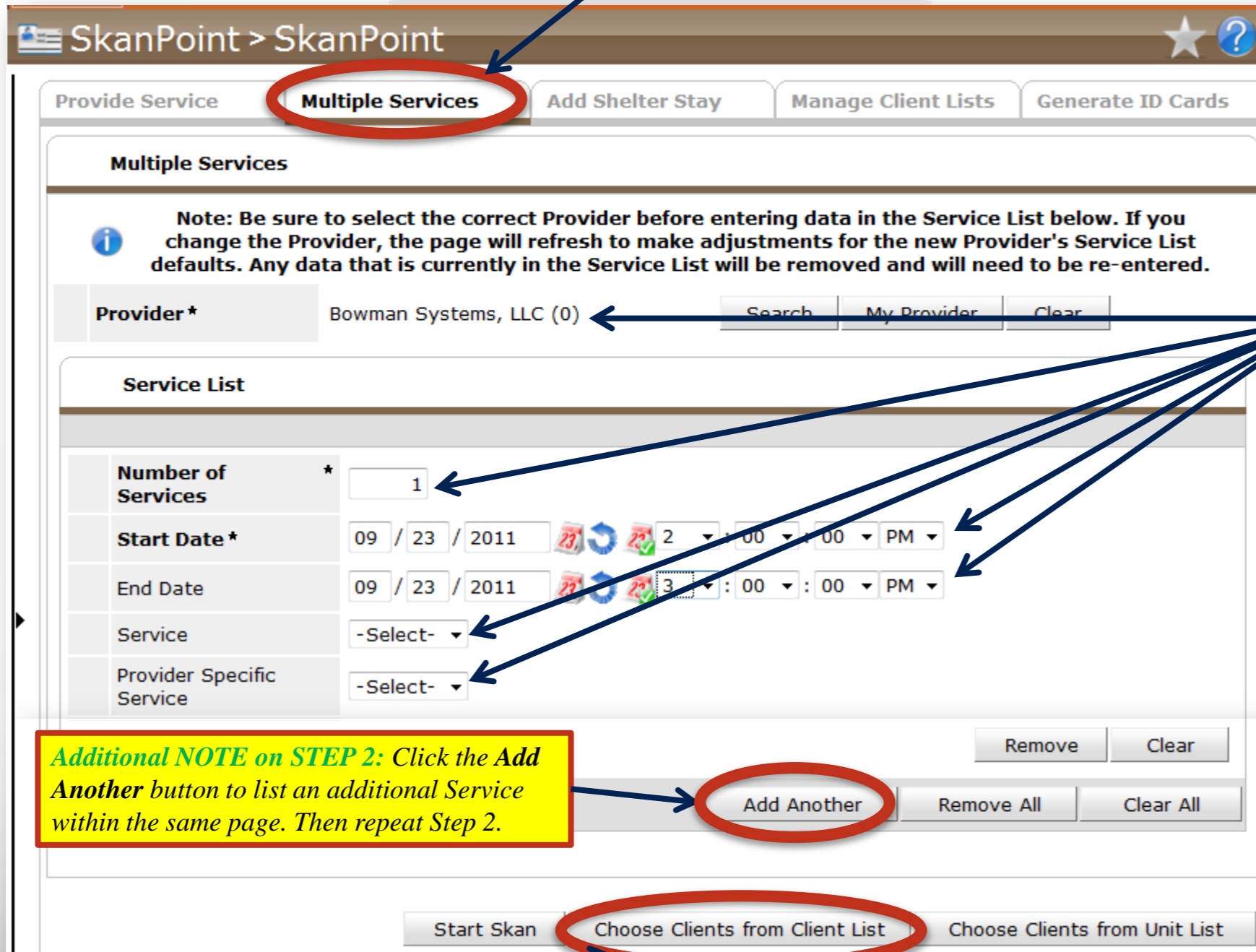
Date	Headline
------	----------

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #5b:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Client
List" button)

STEP 1: Start on the **Multiple Services** tab.



The screenshot shows the SkanPoint web application interface. At the top, there are navigation tabs: "Provide Service", "Multiple Services" (circled in red), "Add Shelter Stay", "Manage Client Lists", and "Generate ID Cards". Below the tabs is a "Multiple Services" section with a note: "Note: Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered." Below the note is a "Provider*" field with "Bowman Systems, LLC (0)" selected. Below that is a "Service List" table with fields for "Number of Services" (1), "Start Date" (09 / 23 / 2011), "End Date" (09 / 23 / 2011), "Service" (-Select-), and "Provider Specific Service" (-Select-). At the bottom of the form are buttons: "Start Skan", "Choose Clients from Client List" (circled in red), and "Choose Clients from Unit List".

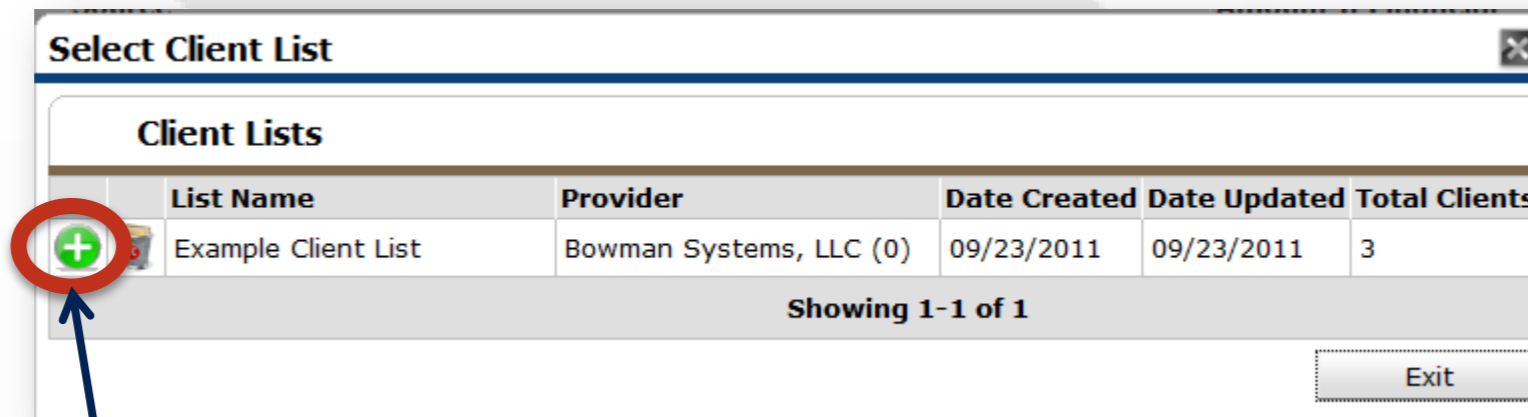
STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

NOTE on STEP 2: The service-related fields may differ, based on your Provider's settings & service configurations.

Additional NOTE on STEP 2: Click the **Add Another** button to list an additional Service within the same page. Then repeat Step 2.

STEP 3: To work from an existing Client List, click the **Choose Clients from Client List** button.

Workflow #5b:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Client
List" button)

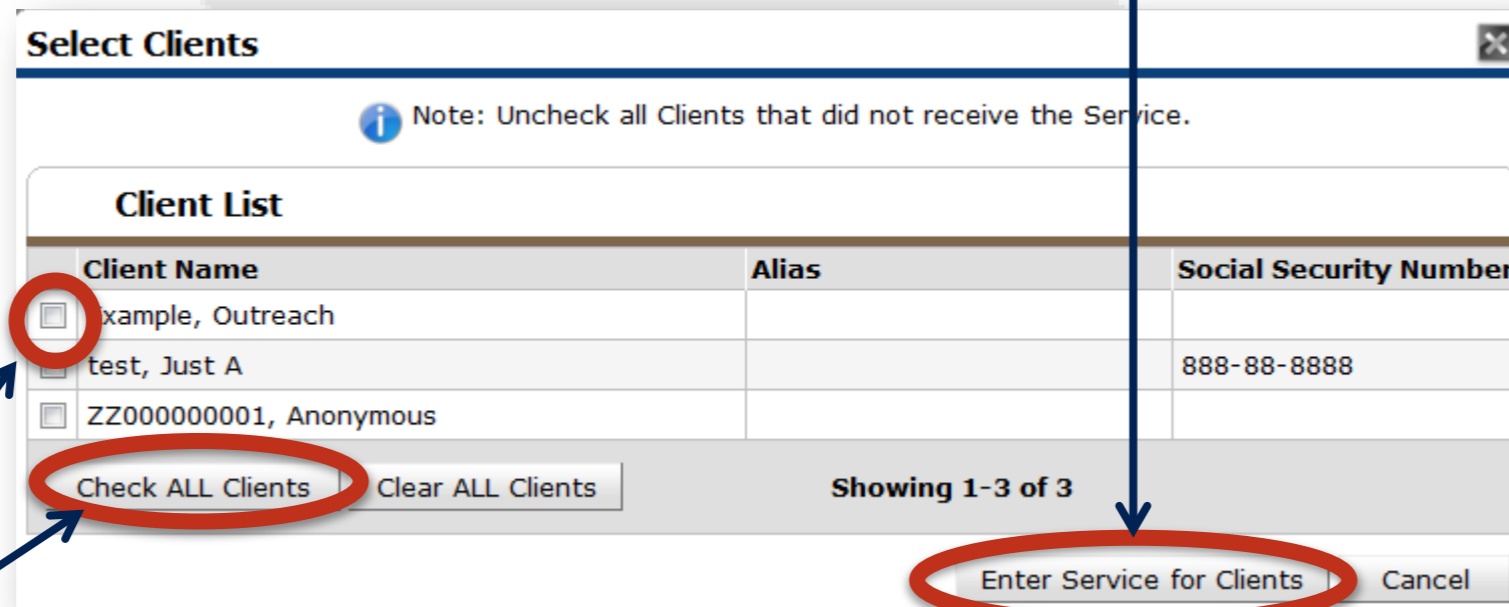


STEP 4: A pop-up window will appear, displaying the existing Client Lists that can be used. When a suitable list is found, click the **Green Plus** icon next to the desired Client List's name to select it.



Workflow #5b:
 Creating Bulk
 Multiple-Service
 Transactions (via
 the "Choose
 Clients from Client
 List" button)

STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.



Client Name	Alias	Social Security Number
<input checked="" type="checkbox"/> Example, Outreach		
<input type="checkbox"/> test, Just A		888-88-8888
<input type="checkbox"/> ZZ000000001, Anonymous		

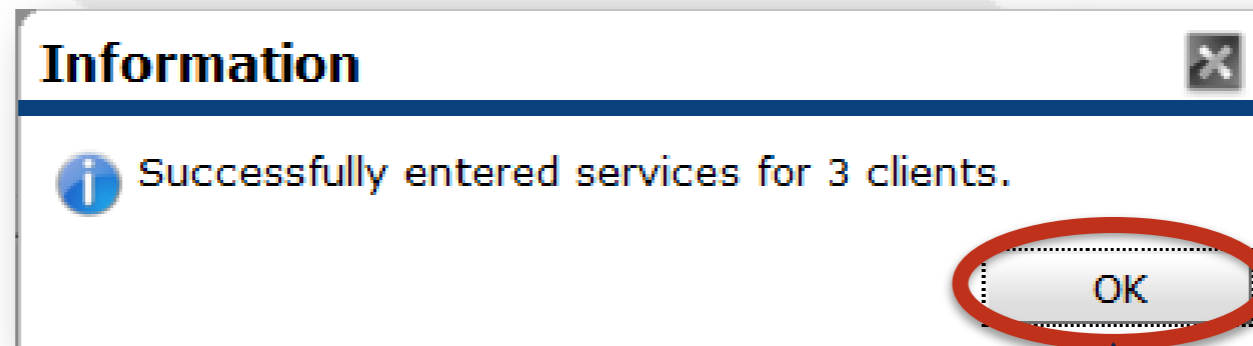
Showing 1-3 of 3

Buttons: Check ALL Clients, Clear ALL Clients, Enter Service for Clients, Cancel

STEP 5: Select the desired Clients by either check-marking the boxes next to each individual Client's name (with a single-left-click of the mouse), or by single-left-clicking the **Check ALL Clients** button. Clients can be "un-selected" by removing the check-mark next to their individual names (again with a single-left-click of the mouse).



Workflow #5b:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Client
List" button)

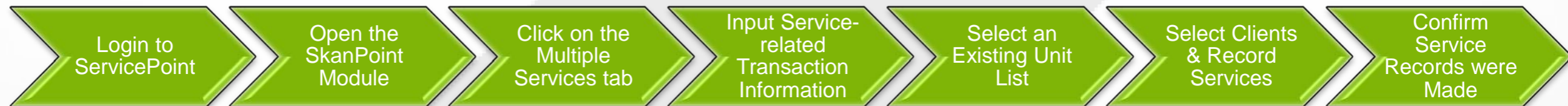


STEP 7: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

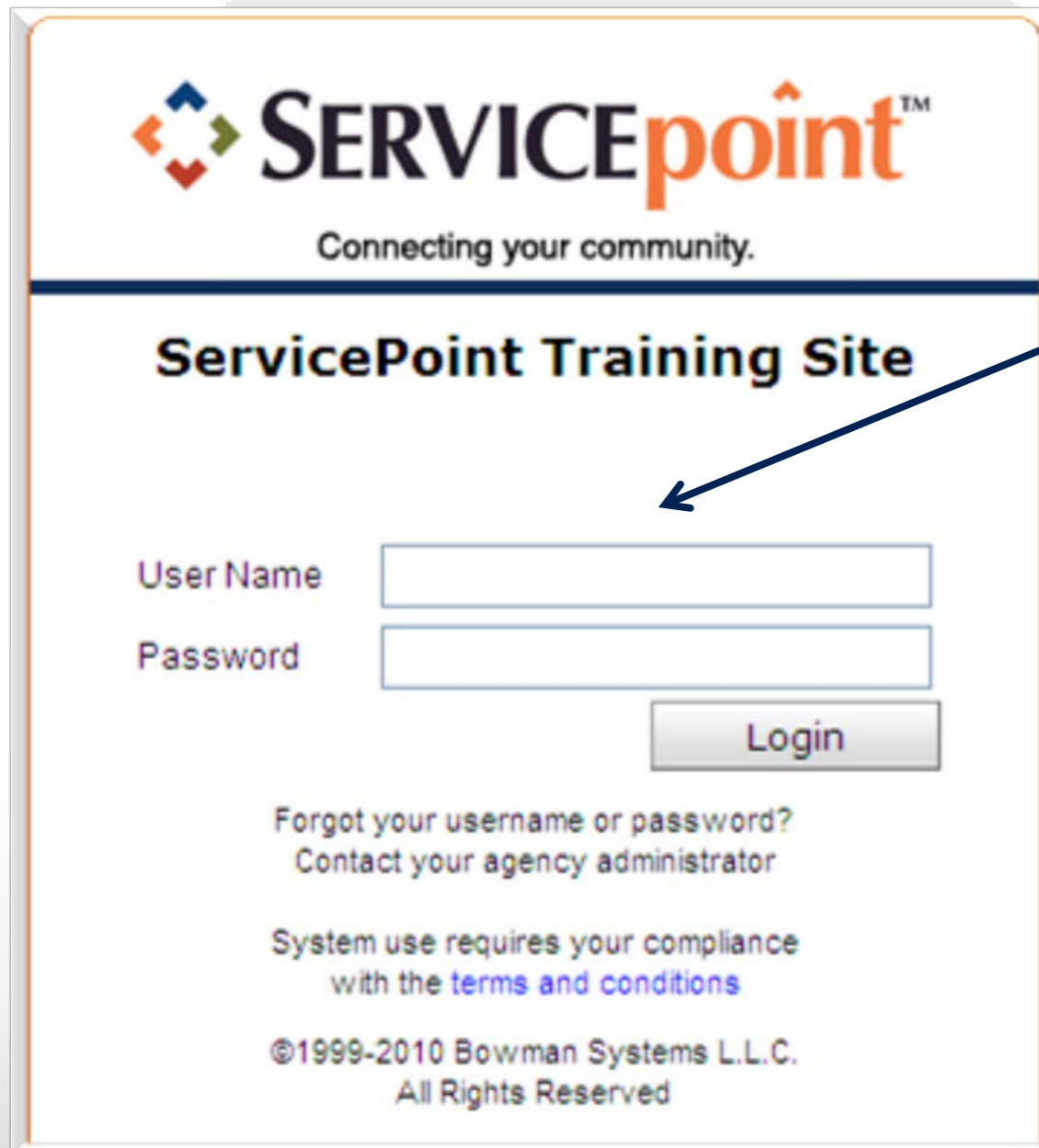


SkanPoint Workflow #5c

Creating Bulk Multiple-Service Transactions



SkanPoint v5.5.1



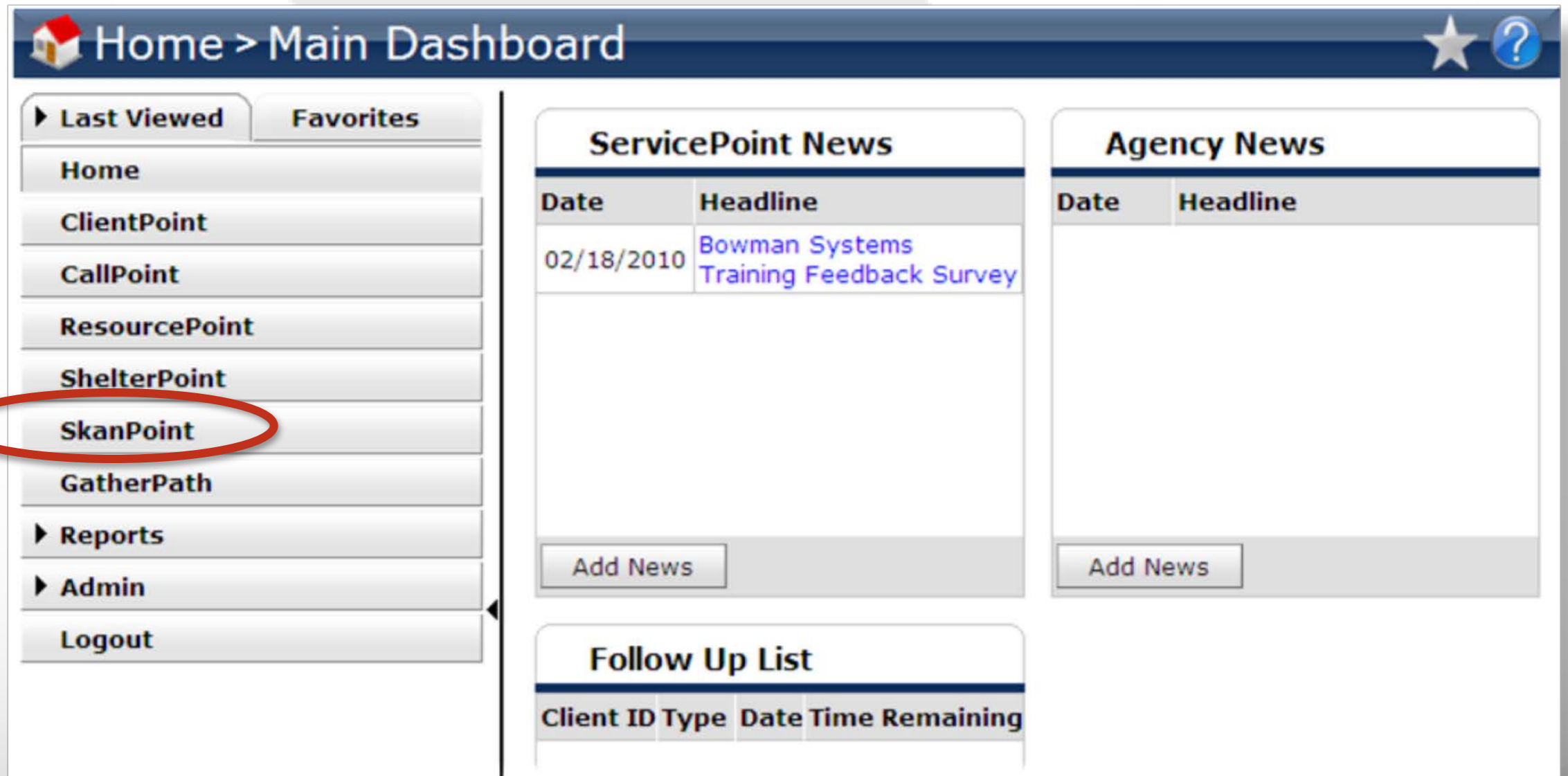
The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields, there is a link for "Forgot your username or password? Contact your agency administrator". At the bottom, there is a disclaimer: "System use requires your compliance with the terms and conditions" and a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

Begin by logging into *ServicePoint*® using your assigned Username & Password.

Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint*®.



SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation menu with 'SkaniPoint' highlighted in a red oval. The main content area features 'ServicePoint News' and 'Agency News' sections, each with a table and an 'Add News' button. A 'Follow Up List' section is partially visible at the bottom.

Home > Main Dashboard

Last Viewed | **Favorites**

- Home
- ClientPoint
- CallPoint
- ResourcePoint
- ShelterPoint
- SkaniPoint**
- GatherPath
- Reports
- Admin
- Logout

ServicePoint News

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

Add News

Agency News

Date	Headline
------	----------

Add News

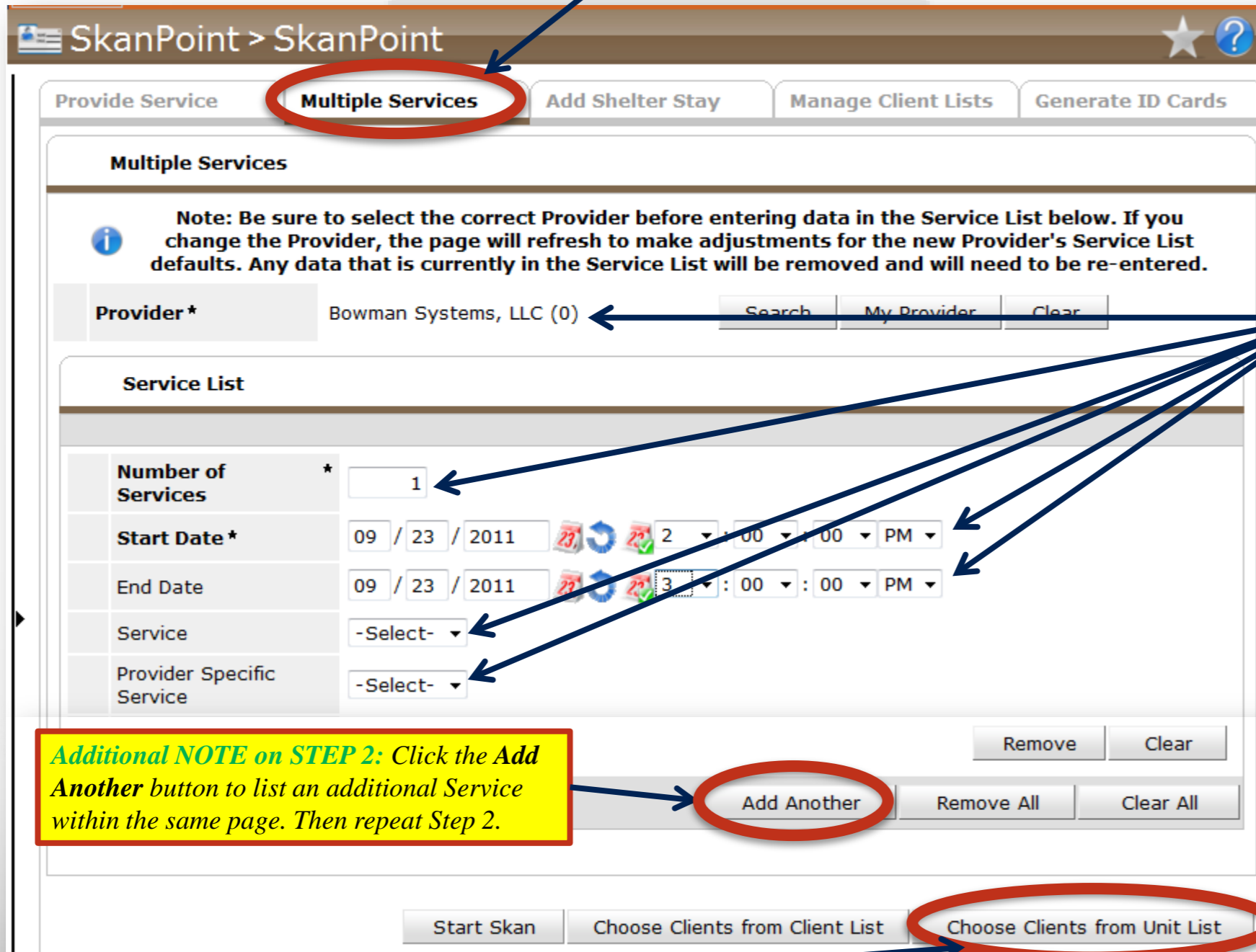
Follow Up List

Client ID	Type	Date	Time	Remaining
-----------	------	------	------	-----------



Workflow #5c:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Unit
List" button)

STEP 1: Start on the **Multiple Services** tab.



The screenshot shows the 'Multiple Services' tab in the SkanPoint application. The 'Multiple Services' tab is circled in red. Below the tab, there is a note about selecting the correct provider. The 'Provider' field is set to 'Bowman Systems, LLC (0)'. The 'Service List' section contains a table with the following fields: 'Number of Services' (value: 1), 'Start Date' (09 / 23 / 2011), 'End Date' (09 / 23 / 2011), 'Service' (-Select-), and 'Provider Specific Service' (-Select-). Below the table are buttons for 'Remove', 'Clear', 'Add Another', 'Remove All', and 'Clear All'. At the bottom of the page are buttons for 'Start Skan', 'Choose Clients from Client List', and 'Choose Clients from Unit List', with the latter circled in red.

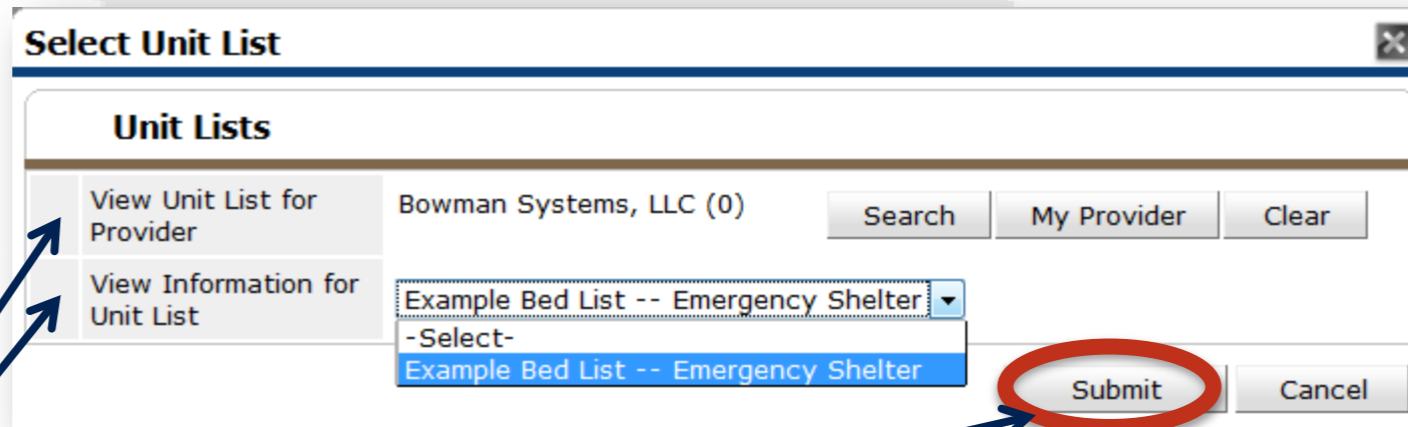
STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

NOTE on STEP 2: The service-related fields may differ, based on your Provider's settings & service configurations.

Additional NOTE on STEP 2: Click the **Add Another** button to list an additional Service within the same page. Then repeat Step 2.

STEP 3: To work from an existing Unit List, click the **Choose Clients from Unit List** button.

Workflow #5c:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Unit
List" button)



The screenshot shows a dialog box titled "Select Unit List". It contains a table with two rows. The first row is "View Unit List for Provider" with the value "Bowman Systems, LLC (0)". The second row is "View Information for Unit List" with a dropdown menu showing "Example Bed List -- Emergency Shelter" and a "Submit" button circled in red. There are also "Search", "My Provider", and "Clear" buttons at the top right, and a "Cancel" button at the bottom right.

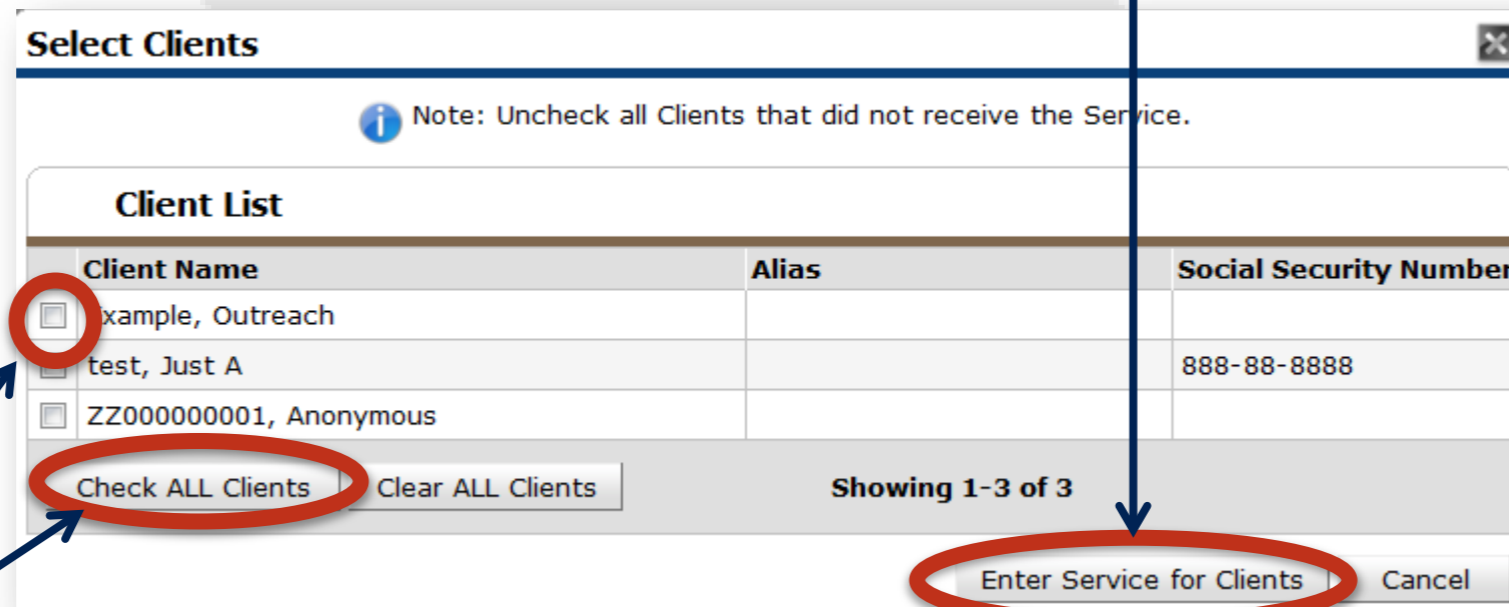
Unit Lists	
View Unit List for Provider	Bowman Systems, LLC (0)
View Information for Unit List	Example Bed List -- Emergency Shelter

STEP 4: Select a **Unit List Provider**, then select a **Unit List** for the Provider, then click the **Submit** button.



Workflow #5c:
 Creating Bulk
 Multiple-Service
 Transactions (via
 the "Choose
 Clients from Unit
 List" button)

STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.



Select Clients

Note: Uncheck all Clients that did not receive the Service.

Client Name	Alias	Social Security Number
<input checked="" type="checkbox"/> Example, Outreach		
<input type="checkbox"/> test, Just A		888-88-8888
<input type="checkbox"/> ZZ000000001, Anonymous		

Showing 1-3 of 3

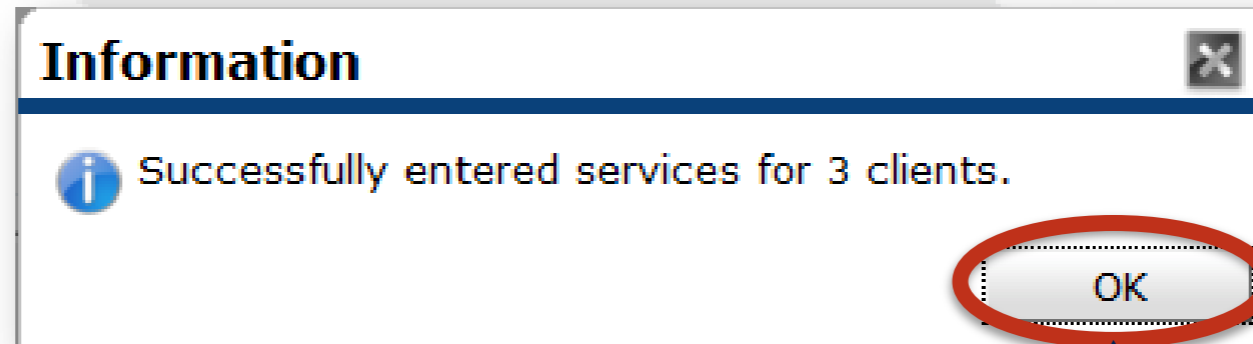
Check ALL Clients Clear ALL Clients

Enter Service for Clients Cancel

STEP 5: Select the desired Clients by either check-marking the boxes next to each individual Client's name (with a single-left-click of the mouse), or by single-left-clicking the **Check ALL Clients** button. Clients can be "un-selected" by removing the check-mark next to their individual names (again with a single-left-click of the mouse).



Workflow #5c:
Creating Bulk
Multiple-Service
Transactions (via
the "Choose
Clients from Unit
List" button)

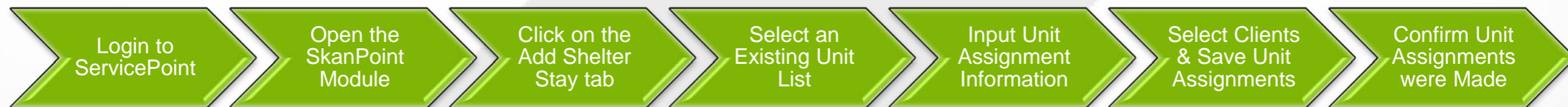


STEP 7: A pop-up window will appear to inform the ServicePoint User that the input Service Transaction Records were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.

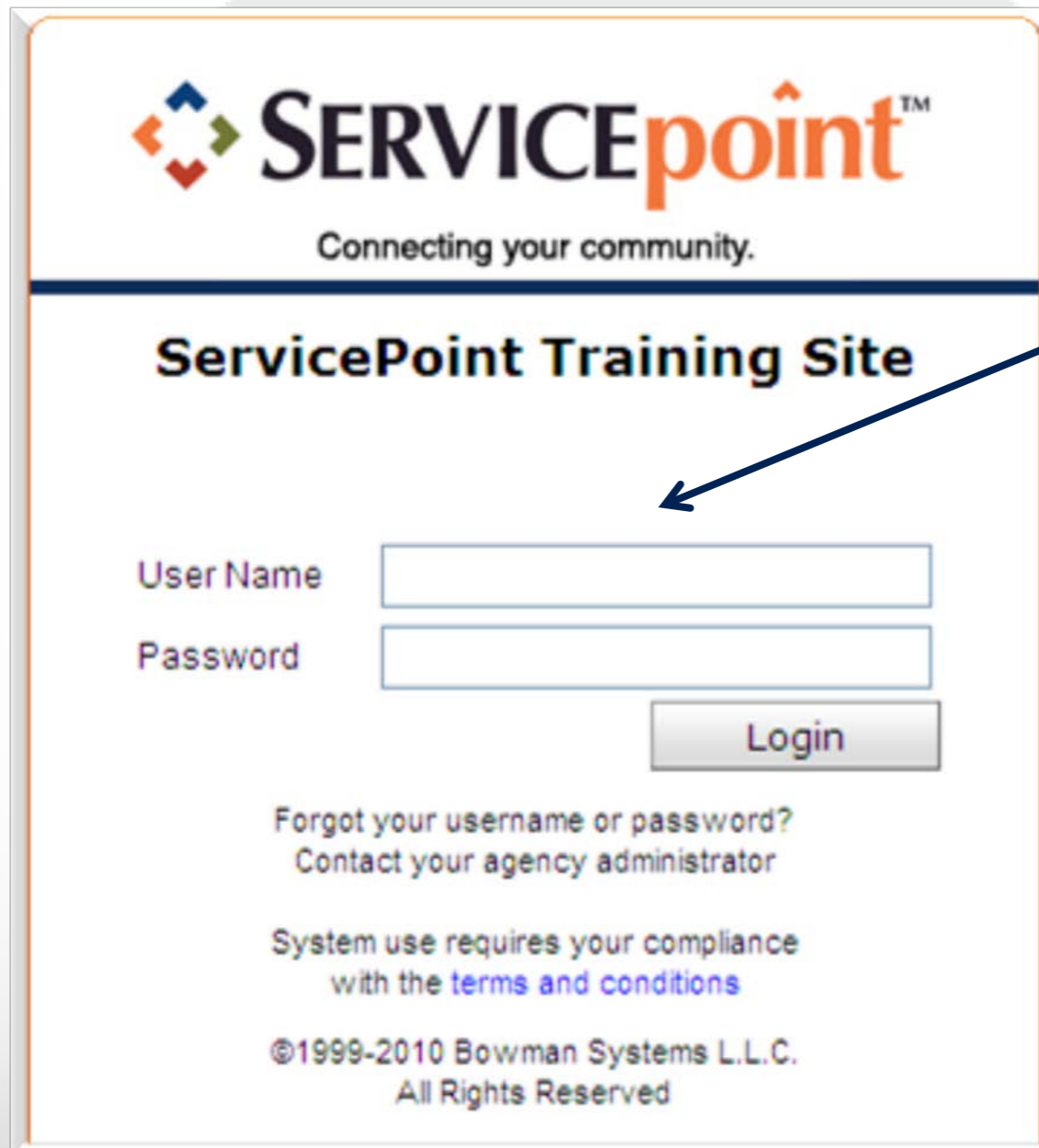


SkanPoint Workflow #6

Creating Bulk Shelter Stays



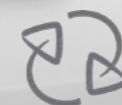
SkanPoint v5.5.1



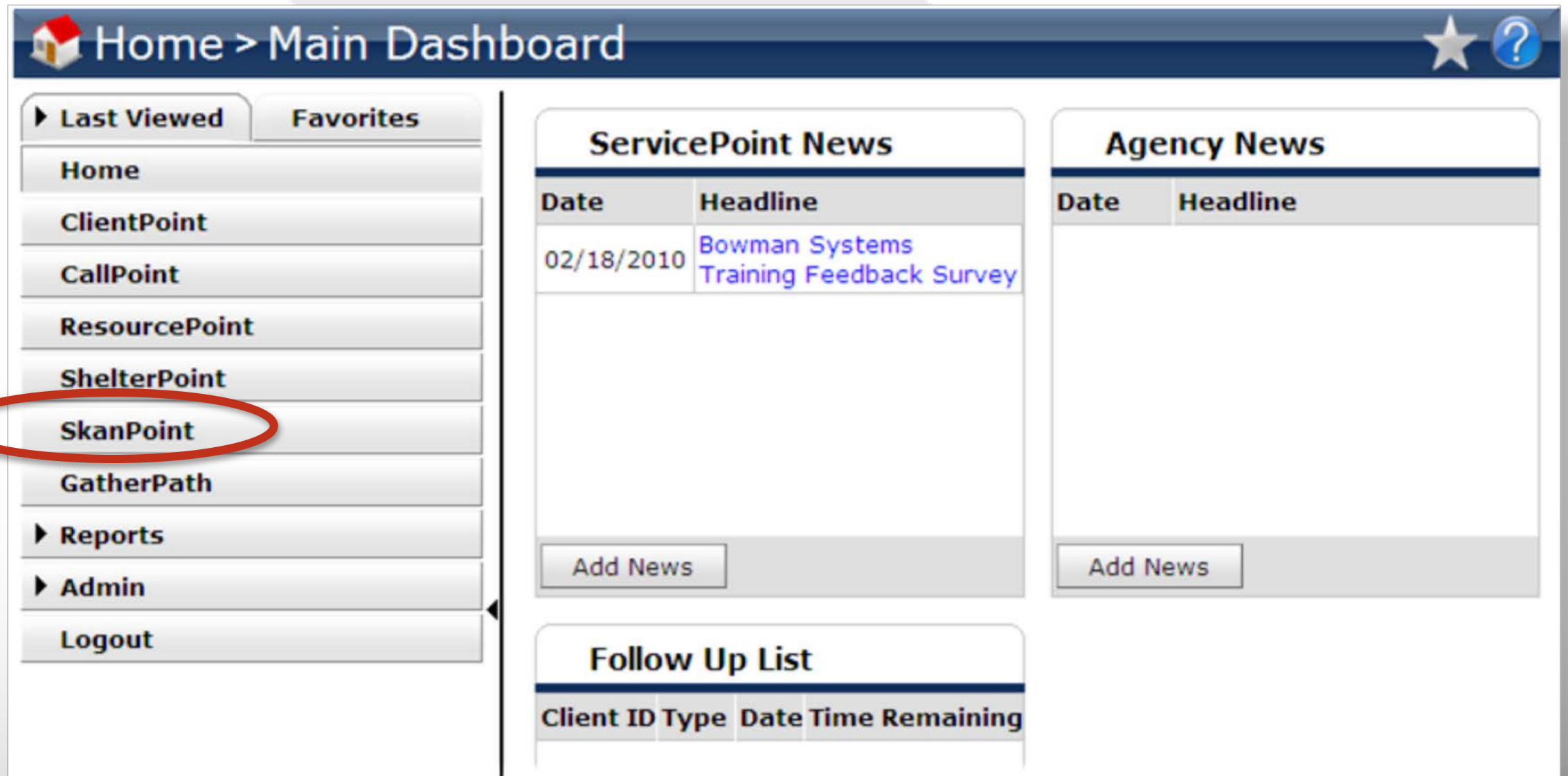
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SkaniPoint v5.5.1



The screenshot shows the 'Main Dashboard' interface. On the left is a navigation sidebar with a 'Last Viewed' tab and a 'Favorites' tab. The 'Last Viewed' list includes: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, SkaniPoint (circled in red), GatherPath, Reports, Admin, and Logout. The main content area is divided into three sections: 'ServicePoint News', 'Agency News', and 'Follow Up List'. 'ServicePoint News' contains one entry: 'Bowman Systems Training Feedback Survey' dated 02/18/2010. 'Agency News' is currently empty. 'Follow Up List' has a header with columns: Client ID, Type, Date, Time, and Remaining.

Date	Headline
02/18/2010	Bowman Systems Training Feedback Survey

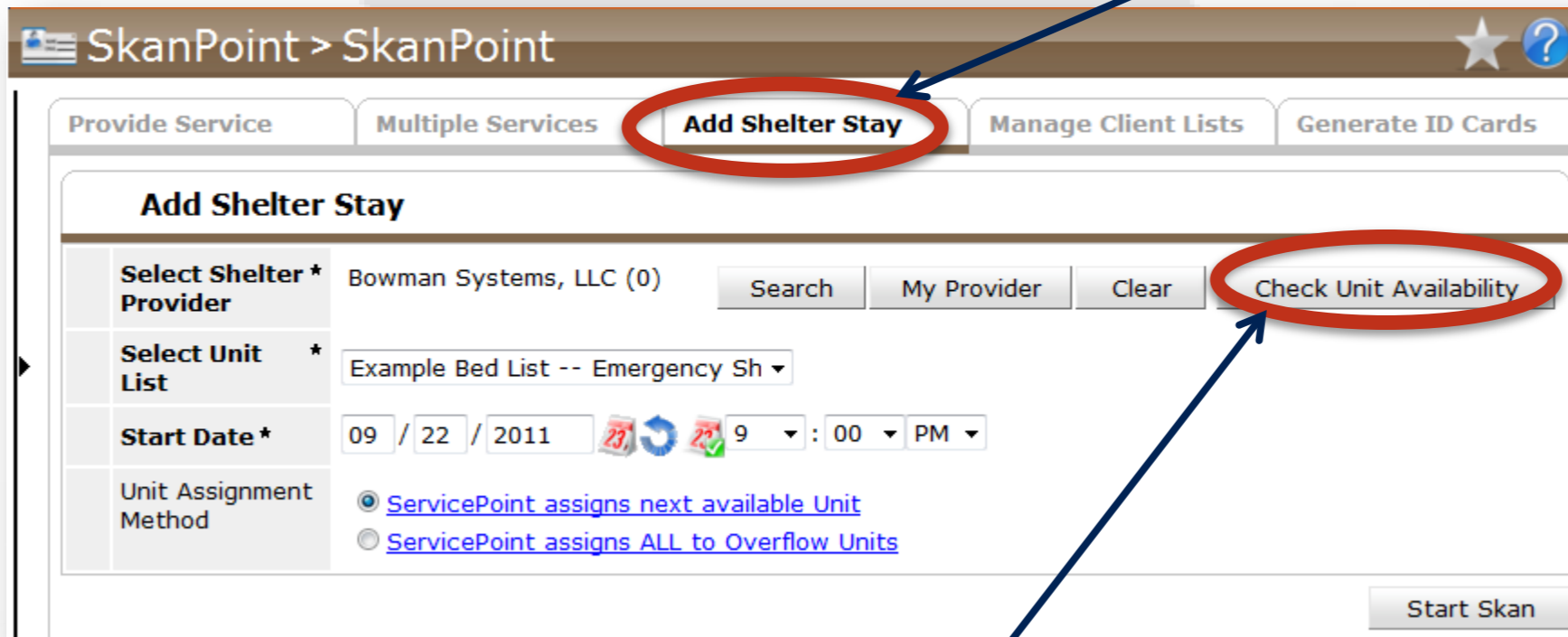
Date	Headline
------	----------

Client ID	Type	Date	Time	Remaining
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Workflow #6:
Creating Bulk Shelter Stays

STEP 1: Start on the **Add Shelter Stay** tab.



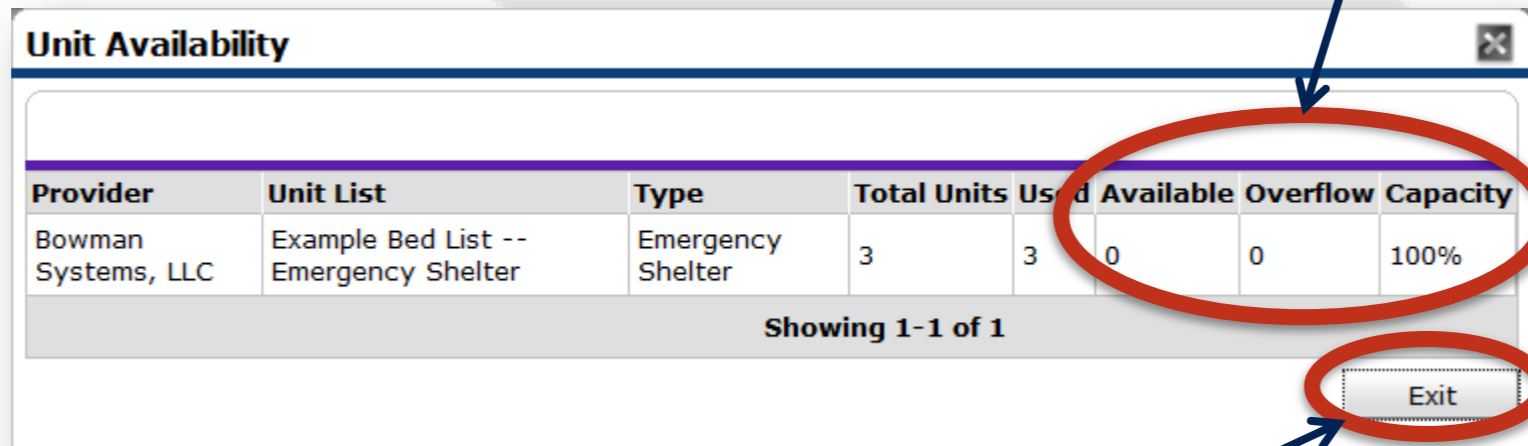
The screenshot shows the SkanPoint web application interface. At the top, there are navigation tabs: 'Provide Service', 'Multiple Services', 'Add Shelter Stay' (circled in red), 'Manage Client Lists', and 'Generate ID Cards'. Below the tabs is the 'Add Shelter Stay' form. The form includes a 'Select Shelter * Provider' field with 'Bowman Systems, LLC (0)' selected, a 'Search' button, a 'My Provider' button, a 'Clear' button, and a 'Check Unit Availability' button (circled in red). Below this is a 'Select Unit * List' dropdown menu showing 'Example Bed List -- Emergency Sh'. The 'Start Date *' field is set to '09 / 22 / 2011' with a time of '9 : 00 PM'. The 'Unit Assignment Method' section has two radio buttons: 'ServicePoint assigns next available Unit' (selected) and 'ServicePoint assigns ALL to Overflow Units'. A 'Start Skan' button is located at the bottom right of the form.

STEP 2: Click the **Check Unit Availability** button to confirm which method you should plan to use to make new Client Unit Assignments.



Workflow #6:
Creating Bulk Shelter Stays

NOTE on STEP 2: Check the **Available**, **Overflow**, and **Capacity** columns to determine with Unit List to use and how to assign incoming Clients to Units.



Provider	Unit List	Type	Total Units Used	Available	Overflow	Capacity	
Bowman Systems, LLC	Example Bed List -- Emergency Shelter	Emergency Shelter	3	3	0	0	100%

Showing 1-1 of 1

Exit

STEP 3: Single-left-click the **Exit** button to leave this screen.



Workflow #6:
Creating Bulk Shelter Stays

STEP 4: Work your way down from the top of the screen to the bottom, filling-in the appropriate Unit-Assignment-related fields. Make sure to give credit to the correct Unit/Service Provider.



The screenshot shows the 'Add Shelter Stay' form in the SkanPoint application. The form includes the following fields and controls:

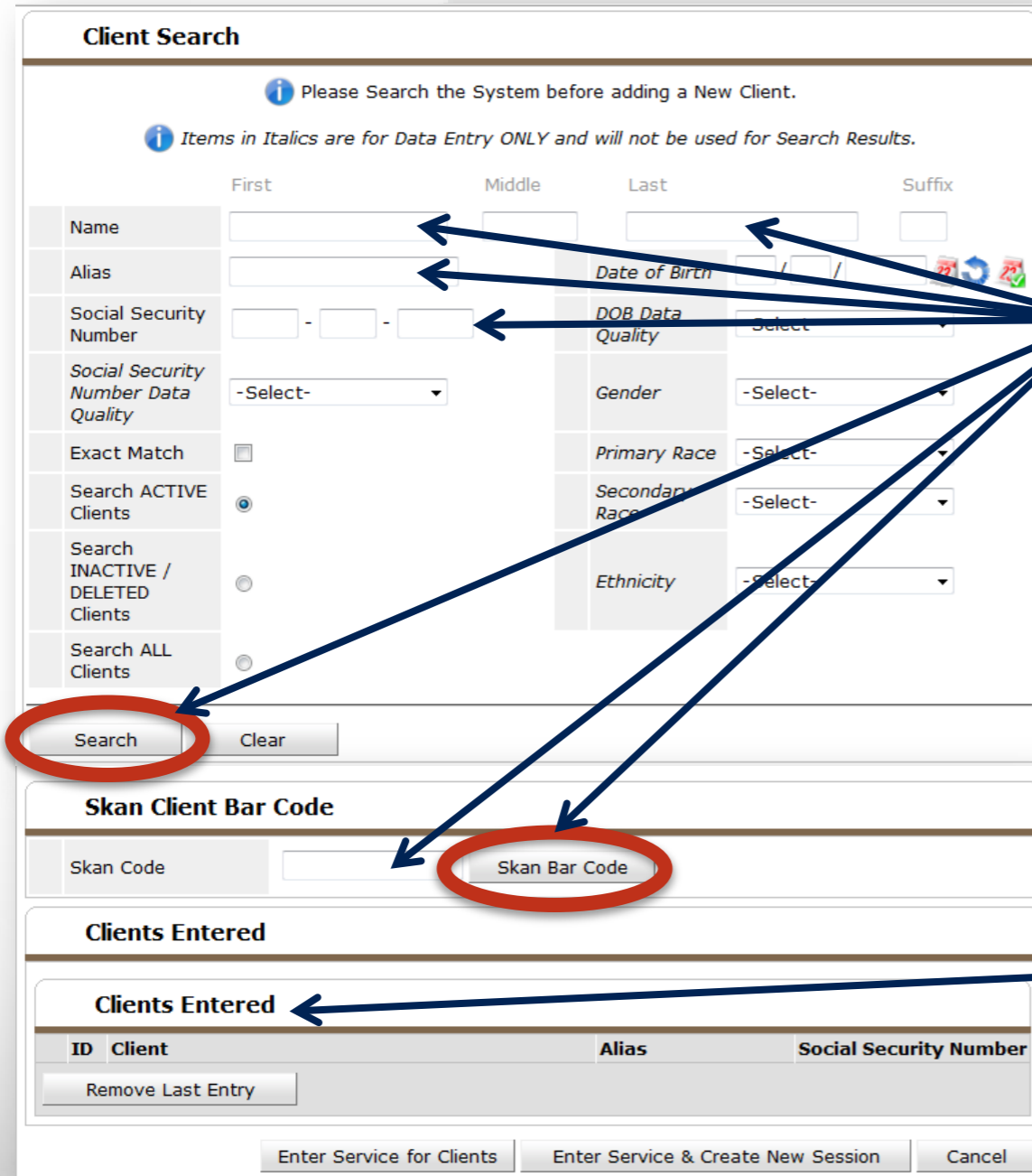
- Select Shelter Provider:** Bowman Systems, LLC (0) with buttons for Search, My Provider, Clear, and Check Unit Availability.
- Select Unit List:** Example Bed List -- Emergency Sh
- Start Date:** 09 / 22 / 2011 with a time selector set to 9:00 PM.
- Unit Assignment Method:** Radio buttons for ServicePoint assigns next available Unit and ServicePoint assigns ALL to Overflow Units.
- Start Skan:** A button at the bottom right, circled in red.

Blue arrows point from the 'Start Skan' button to each of the four main input fields. A red circle highlights the 'Start Skan' button.

STEP 5: Single-left-click the **Start Skan** button.



Workflow #6:
Creating Bulk Shelter Stays



Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

First Middle Last Suffix

Name

Alias

Social Security Number - -

Social Security Number Data Quality

Exact Match

Search ACTIVE Clients

Search INACTIVE / DELETED Clients

Search ALL Clients

Search

Skani Client Bar Code

Skani Code

Skani Bar Code

Clients Entered

Clients Entered

ID	Client	Alias	Social Security Number
<input type="button" value="Remove Last Entry"/>			

STEP 6: Locate the Client(s) you wish to Assign a Unit, by using either a First & Last Name, Alias, or SSN. Then click the **Search** button. When a list of possible matches appears, click the **Green Plus** icon next to the desired Client's name to add the Client to the list of Service Recipients.

~ OR ~

Locate the Client(s) you wish to Assign a Unit by typing each respective Client's ID Number into the **Skani Code** field, and then click the **Skani Bar Code** button. *Using a barcode scanner will automatically complete this function.*




NOTE on STEP 6: Selected Clients will appear at the bottom of the screen under the Clients Entered section.



Workflow #6:

 Creating
 Bulk Shelter
 Stays

Additional NOTE on STEP 6: Clients that were incorrectly added to the list can easily be removed by single-left-clicking the **Red Minus Icon** to delete individual names, one-at-a-time.

Clients Entered			
ID	Client	Alias	Social Security Number
 3	Example, Outreach		
 2	test, Just A		888-88-8888
 1	ZZ000000001, Anonymous		

Remove Last Entry

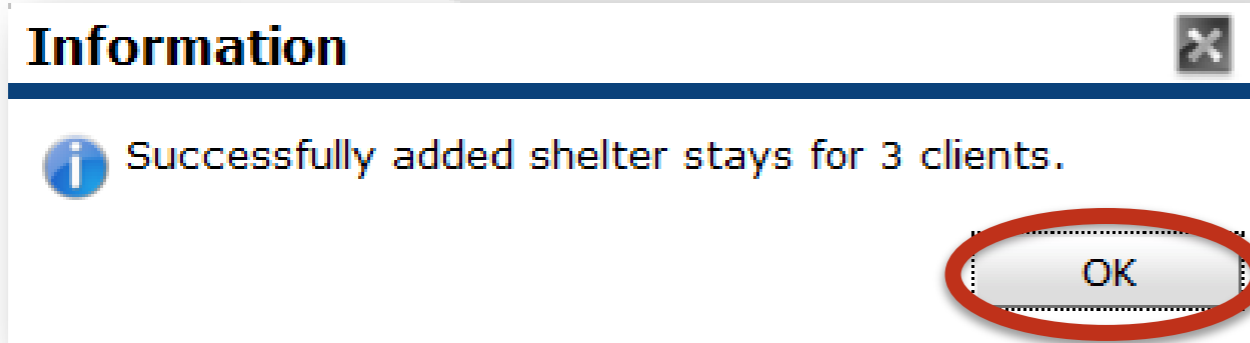
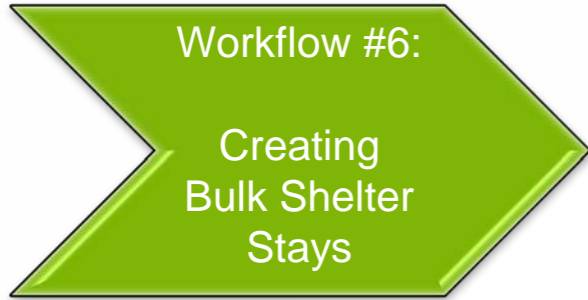
Showing 1-3 of 3

Enter Service for Clients Enter Service & Create New Session Cancel

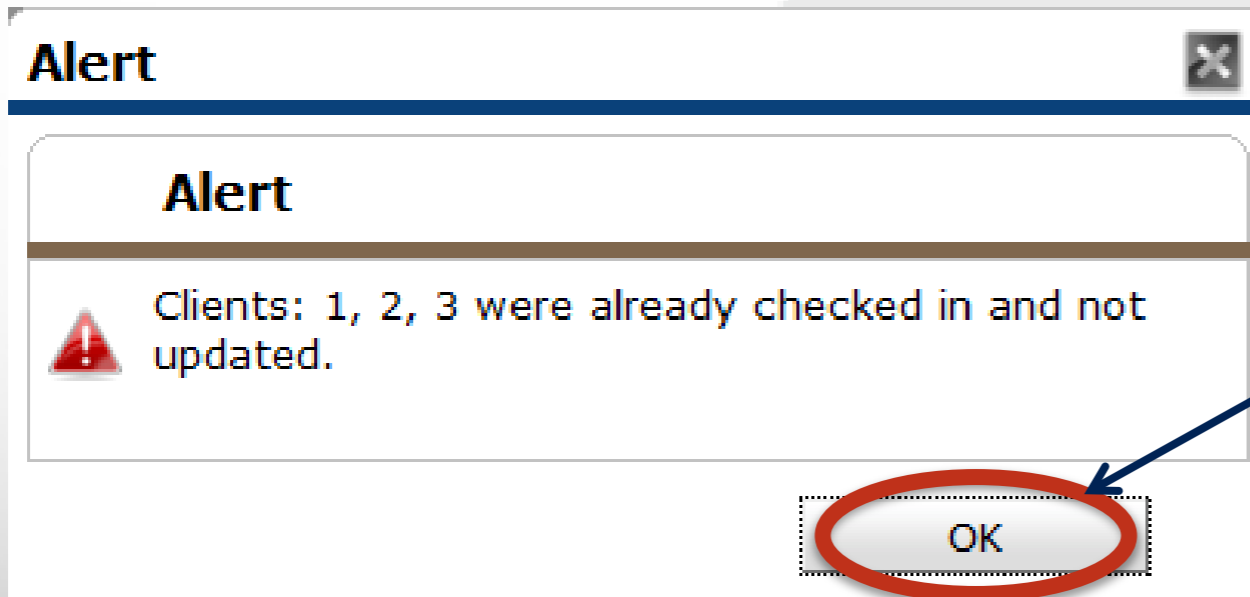
STEP 7: After all necessary Clients have been added to the list, click the **Enter Service for Clients** or the **Enter Service & Create New Session** button.

NOTE on STEP 7: Use the **Enter Service for Clients** button if you intend to input additional similar Unit Assignments for a different group of Clients. (Your existing Provider Unit Assignment data will be retained.) Otherwise, use the **Enter Service & Create New Session** button if you intend to input additional Unit Assignments which are in no-way similar to your current Provider Unit Assignment data. (The **Add Shelter Stay** screen will essentially be “wiped clean” for future use.)





STEP 8: A pop-up window will appear to inform the ServicePoint User that the input Unit Assignments were successfully recorded. Confirm this notification by single-left-clicking the **OK** button.



NOTE on STEP 8: *If any of the selected Clients (in Steps #6 or #7) had already been checked-into a Unit on the chosen Unit List, an Alert pop-up window will also appear to inform the ServicePoint User that one or more Unit Assignments were unsuccessful. Confirm this notification by again single-left-clicking the **OK** button.*

