BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint™

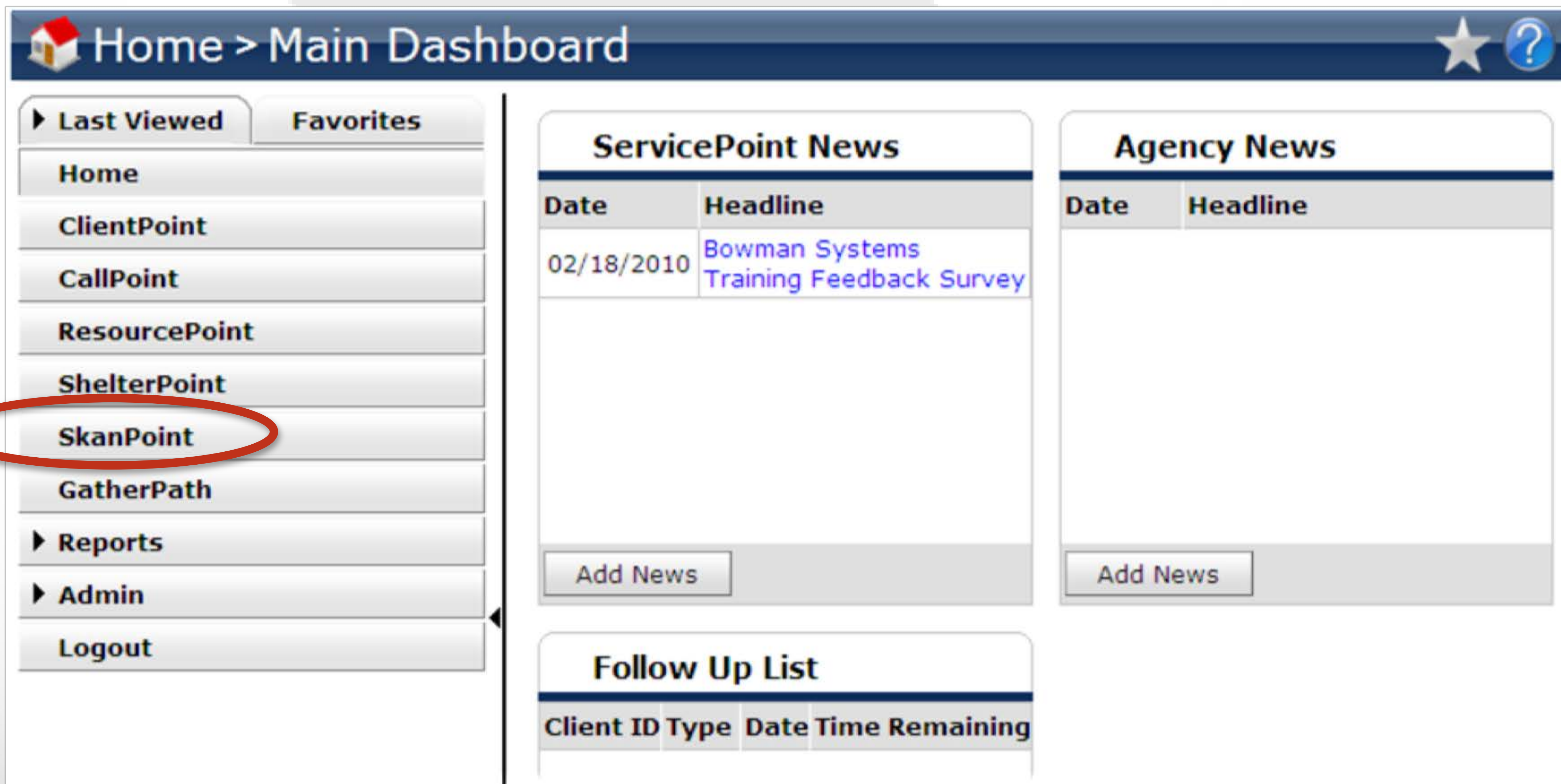
ServicePoint version 5.5.1

Data-Entry Workflows

Connecting Communities > Demonstrating Outcomes™

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

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.* ***

Collaborate. Coordinate. Evaluate.

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)**

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint Workflow #1

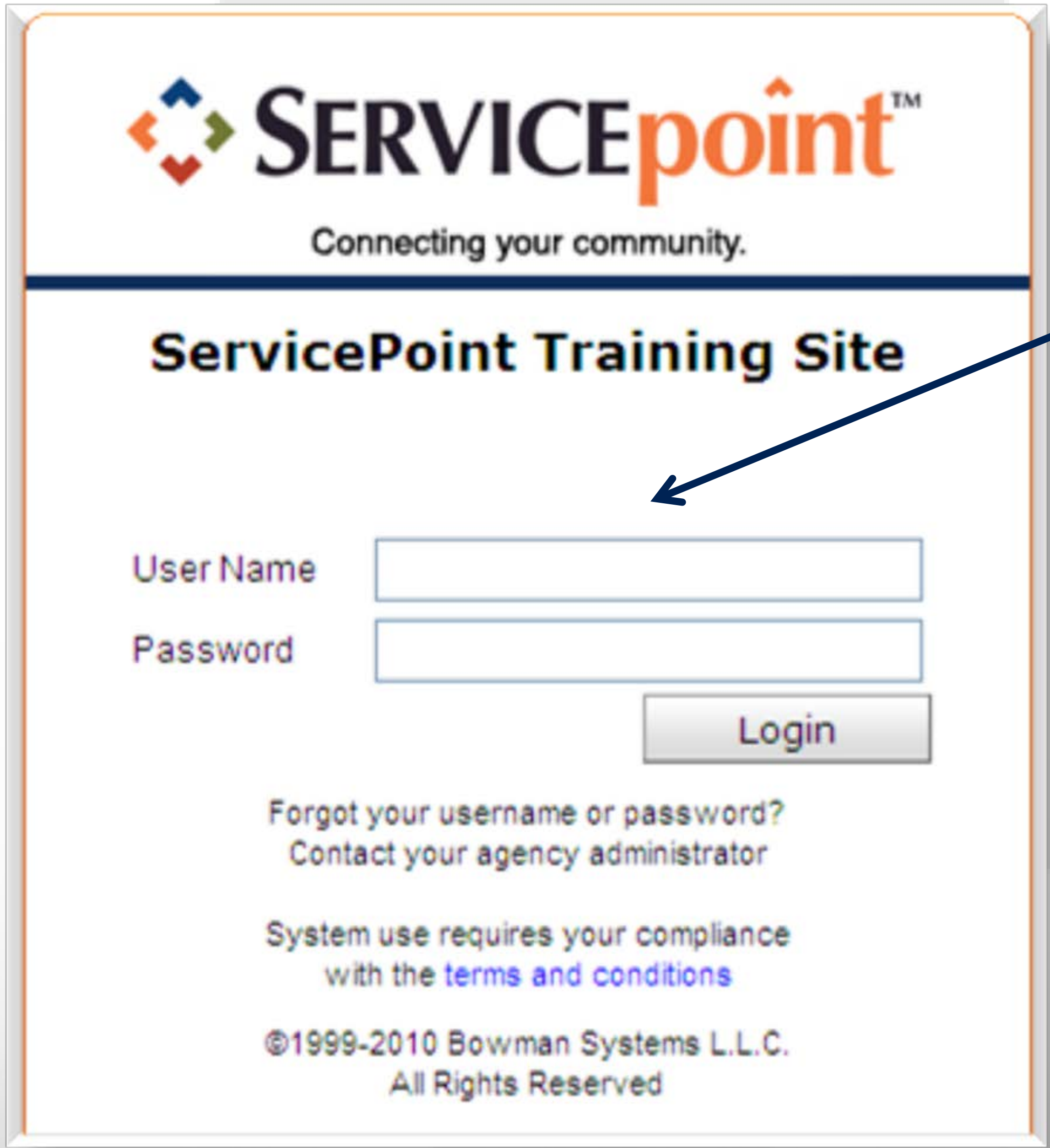
Creating New Client/Consumer Lists

1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Manage Client Lists tab
4. Create a New Client List
5. Add Clients to your New Client List
6. Review your Client List & Save your Changes

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

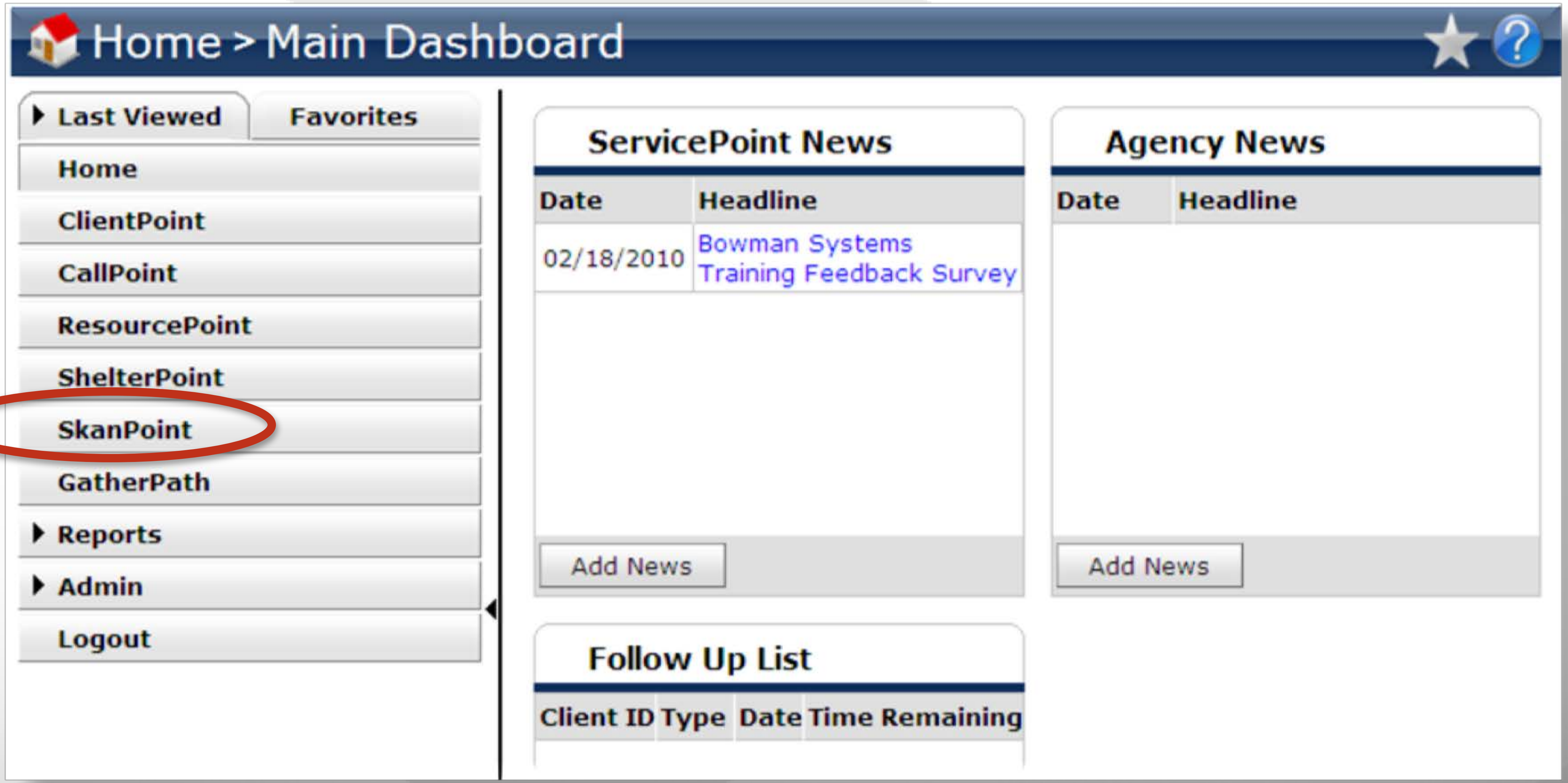
SkanPoint v5.5.1



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*®.

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

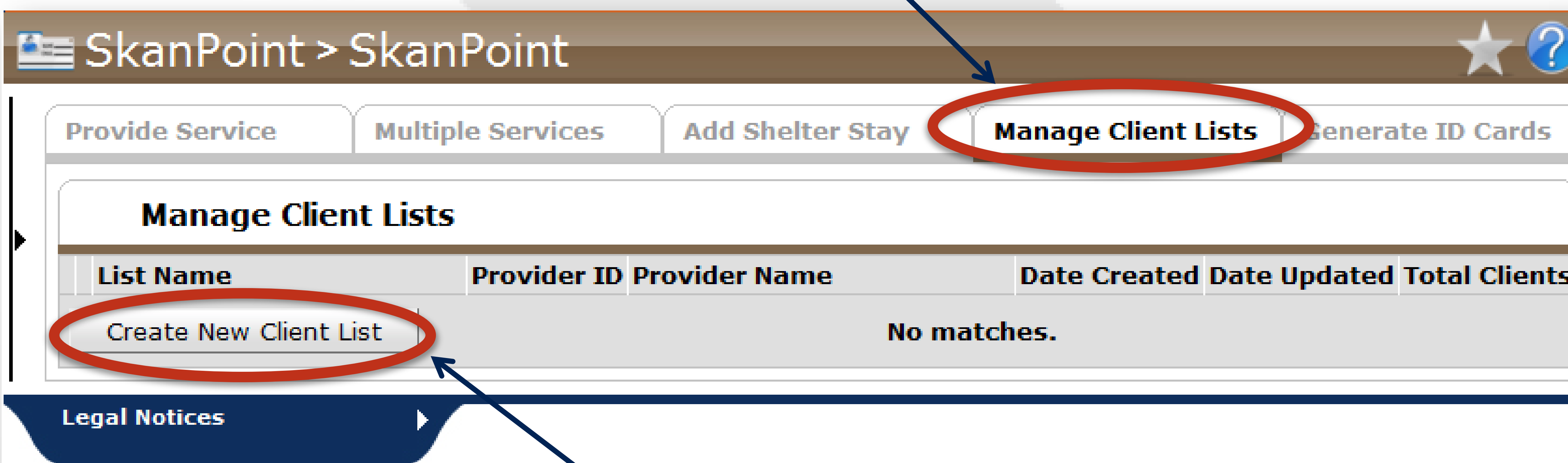
BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #1:

Creating New Client List(s)

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



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

Collaborate. Coordinate. Evaluate.

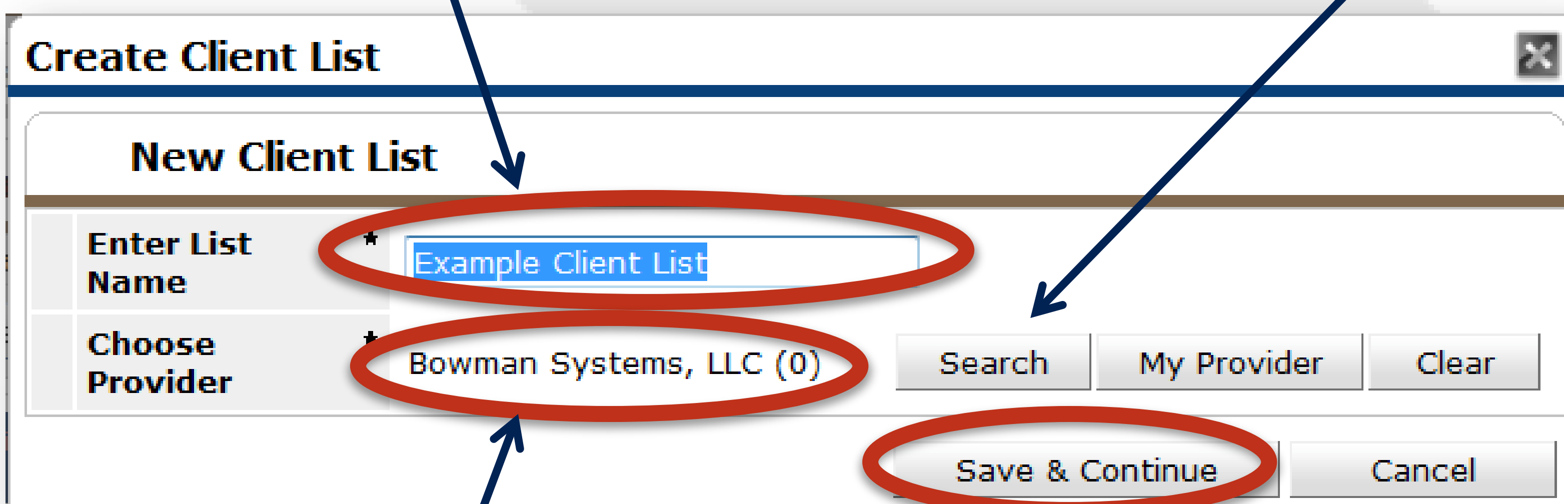
BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #1:

Creating New Client List(s)

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



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.

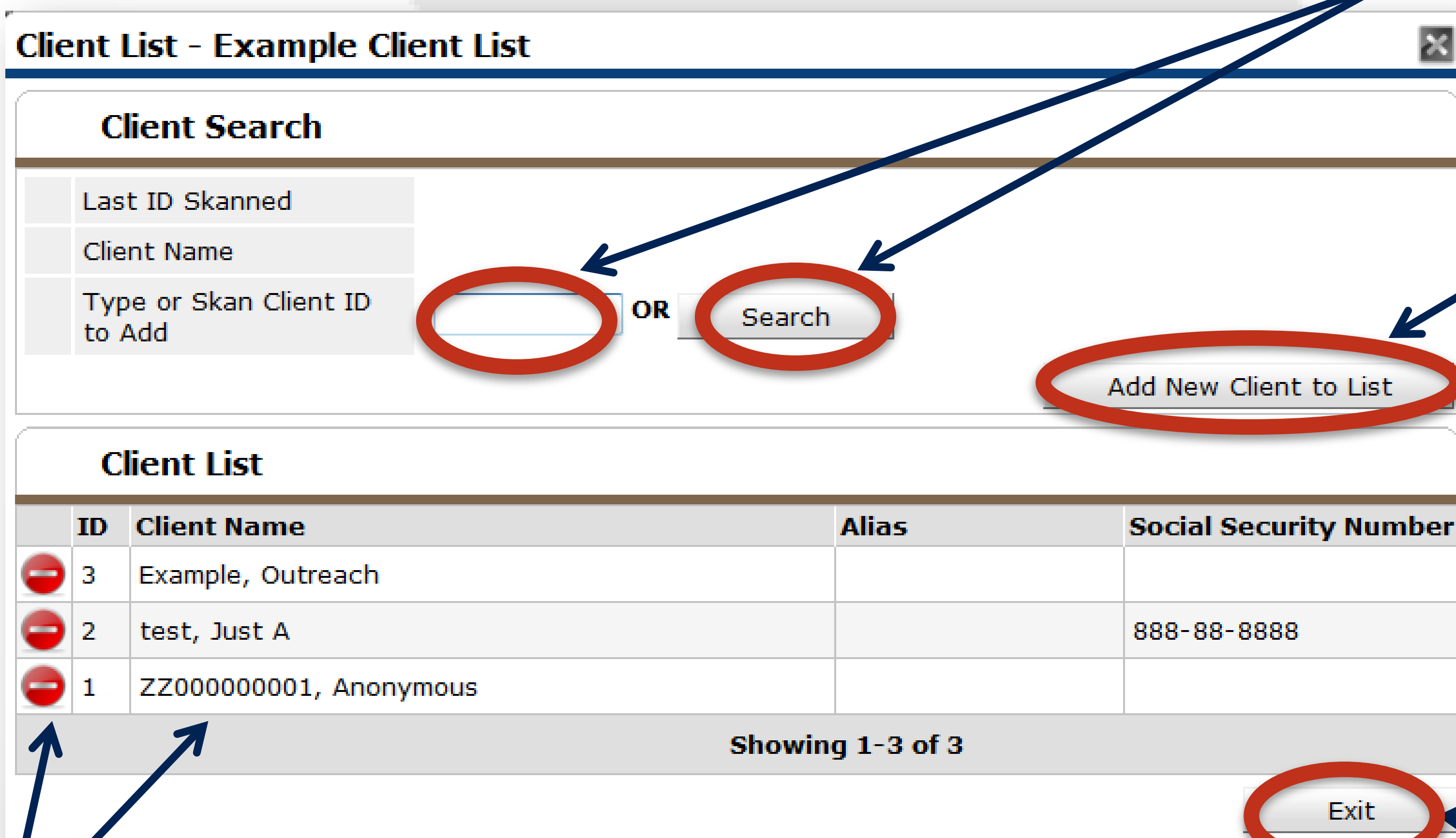
STEP 5: Single left-click the **Save & Continue** button.

Collaborate. Coordinate. Evaluate.

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.



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.*

Collaborate. Coordinate. Evaluate.

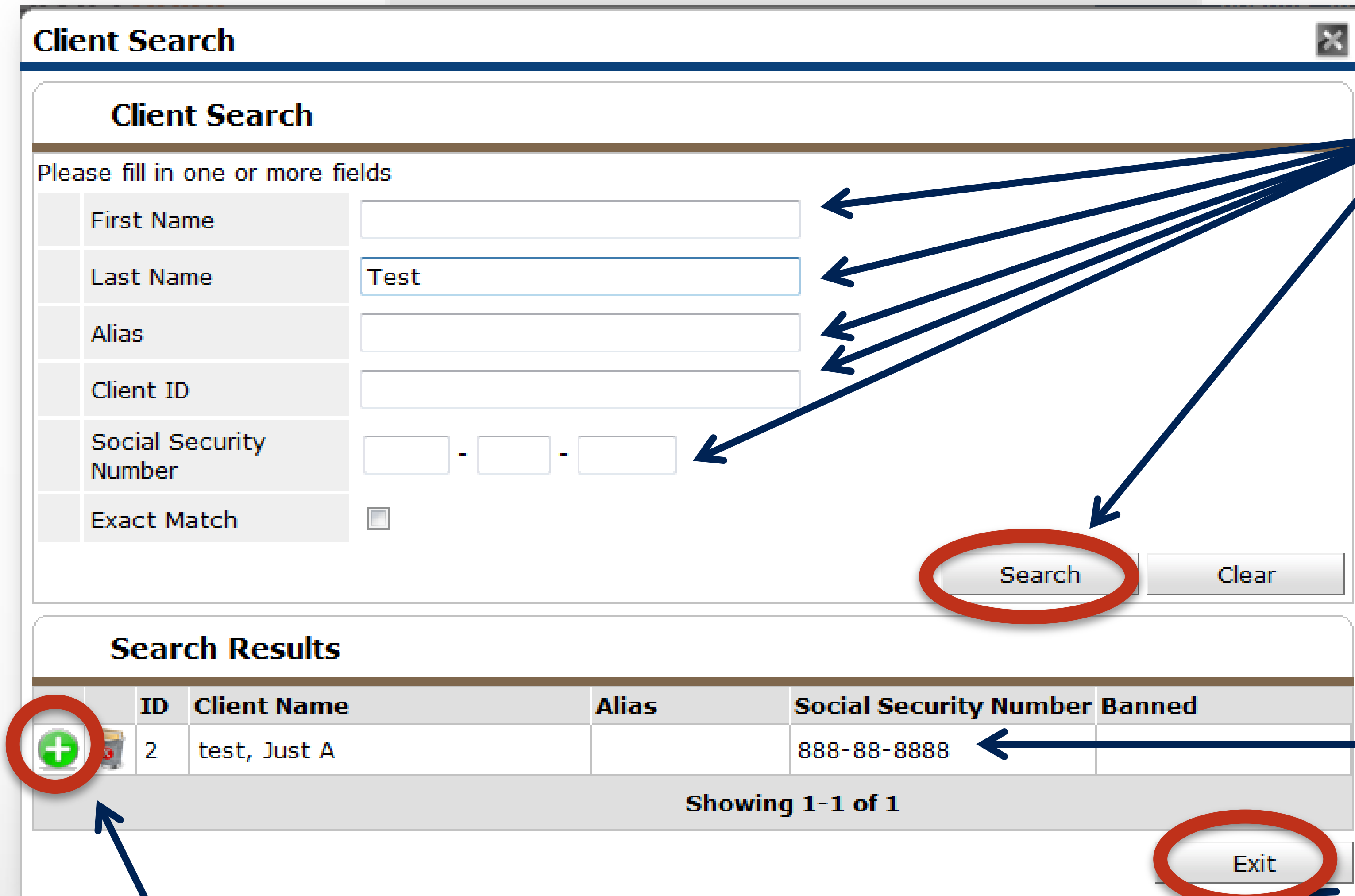
Workflow #1:

Creating New Client List(s)

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

*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:*



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.

Collaborate. Coordinate. Evaluate.

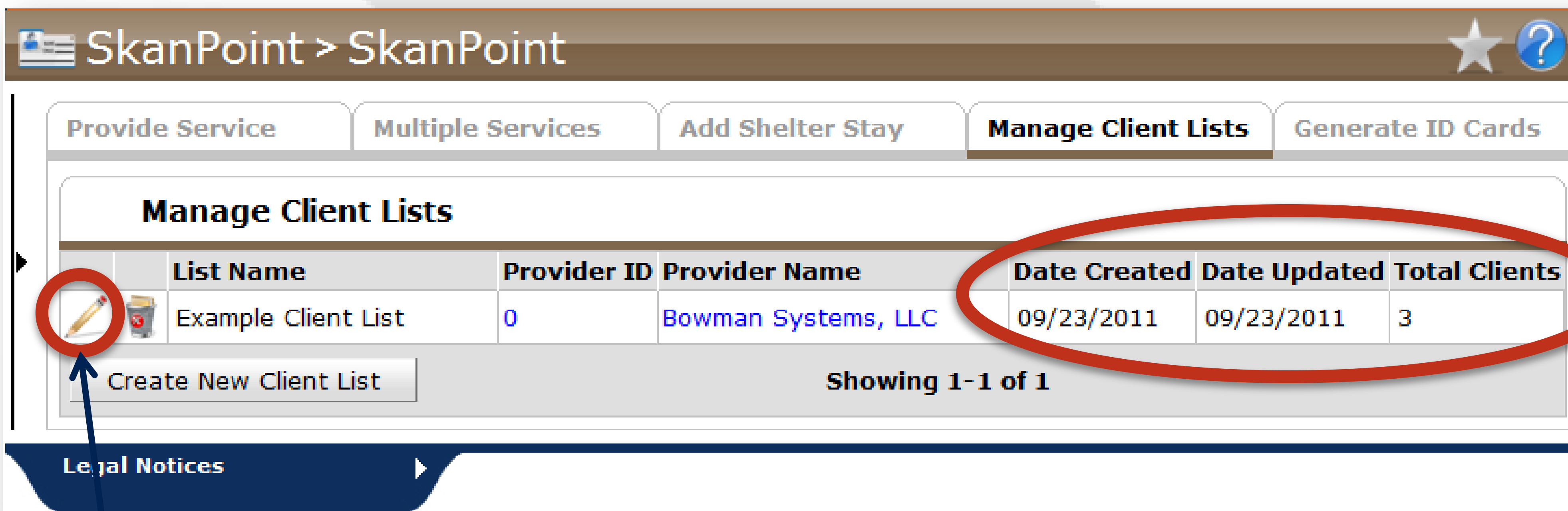
Workflow #1:

Creating New Client List(s)

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.



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

Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint Workflow #2

Managing Existing Client/Consumer Lists

Login to ServicePoint → Open the SkanPoint Module → Click on the Manage Client Lists tab → Edit an Existing Client List → Add (or Remove) Clients on your Existing Client List → Review your Client List Edits & Save your Changes

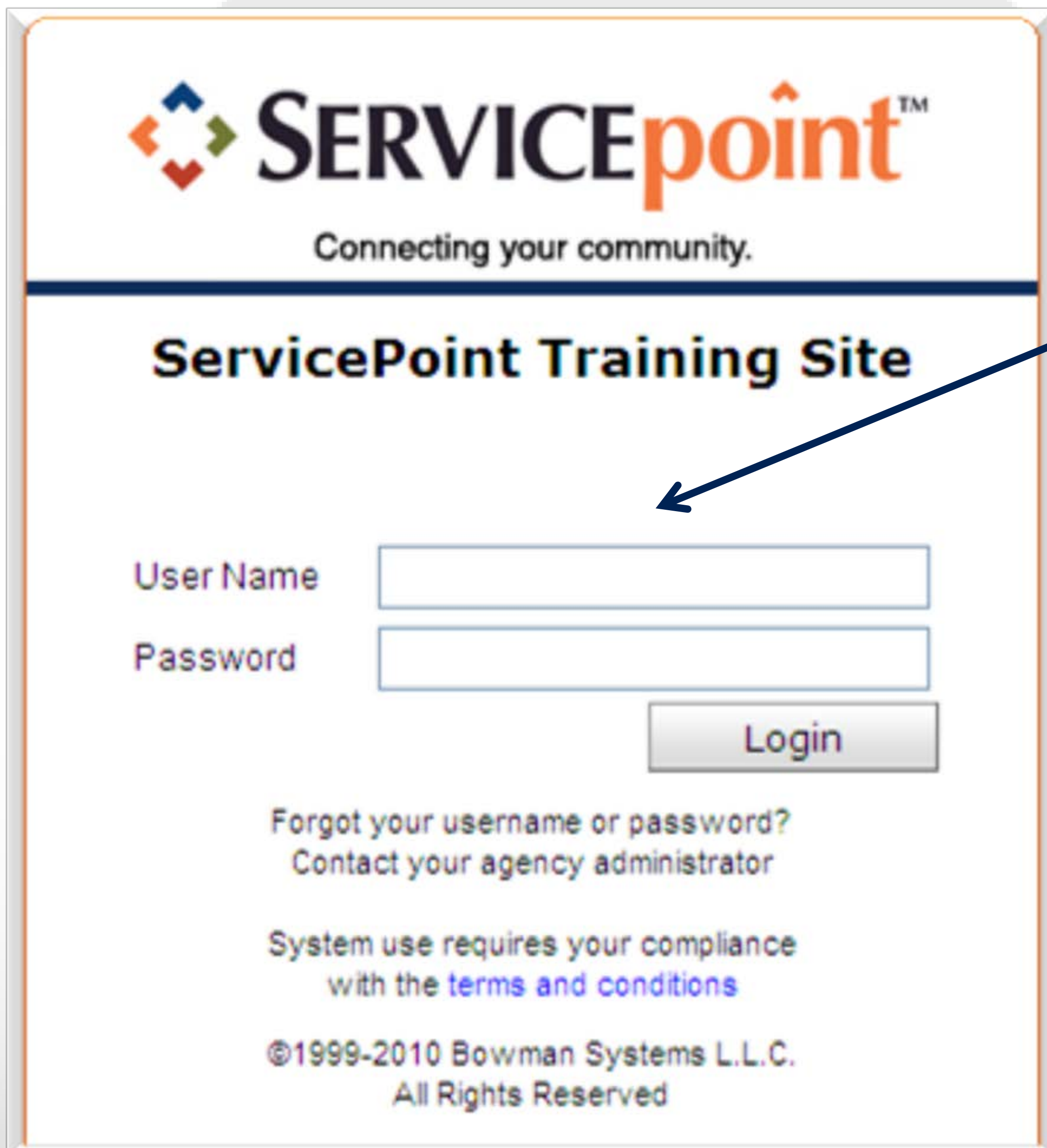
Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1

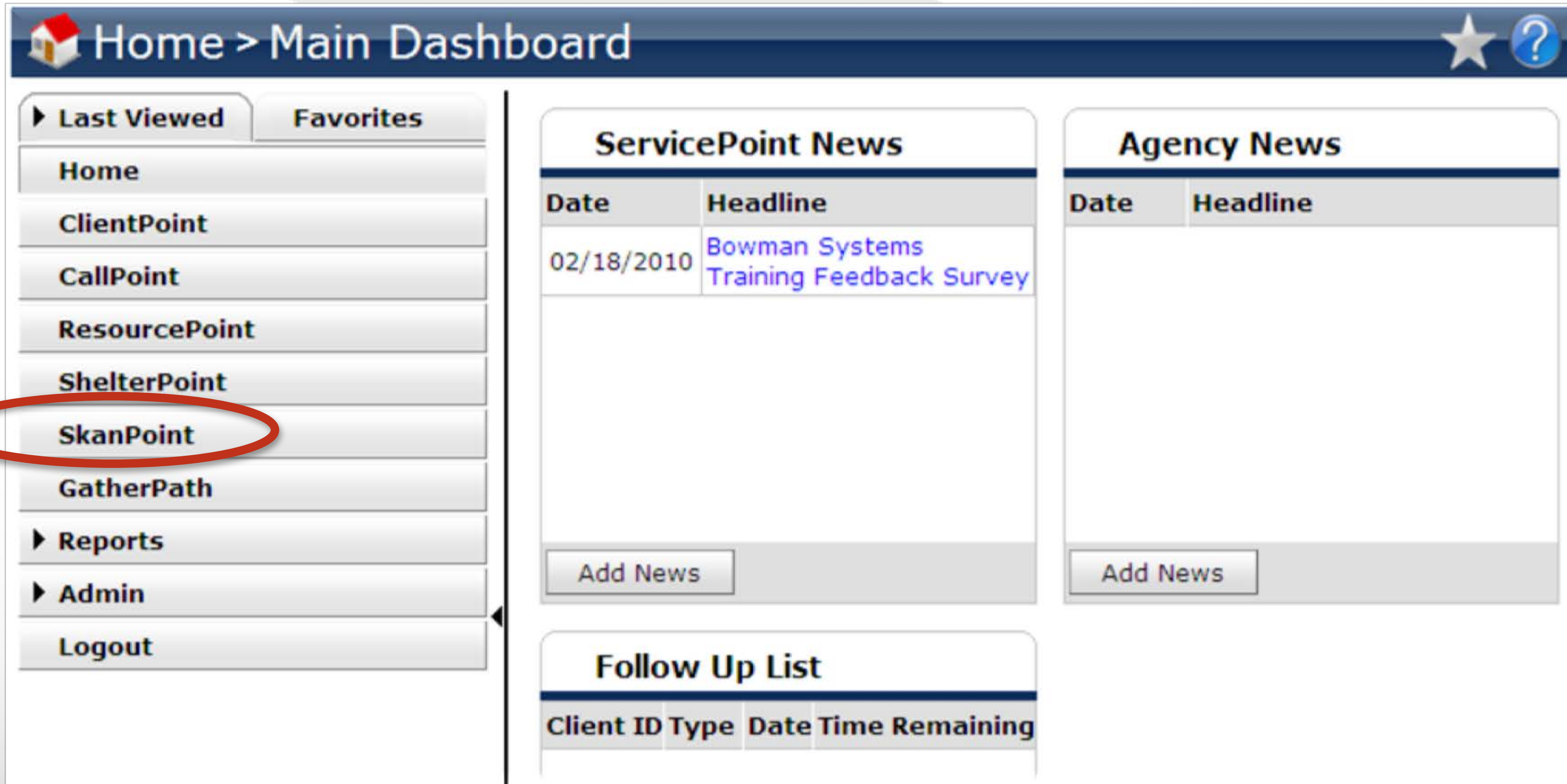


Begin by logging into *ServicePoint®* using your assigned Username & Password.

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

Collaborate. Coordinate. Evaluate.

SkanPoint v5.5.1

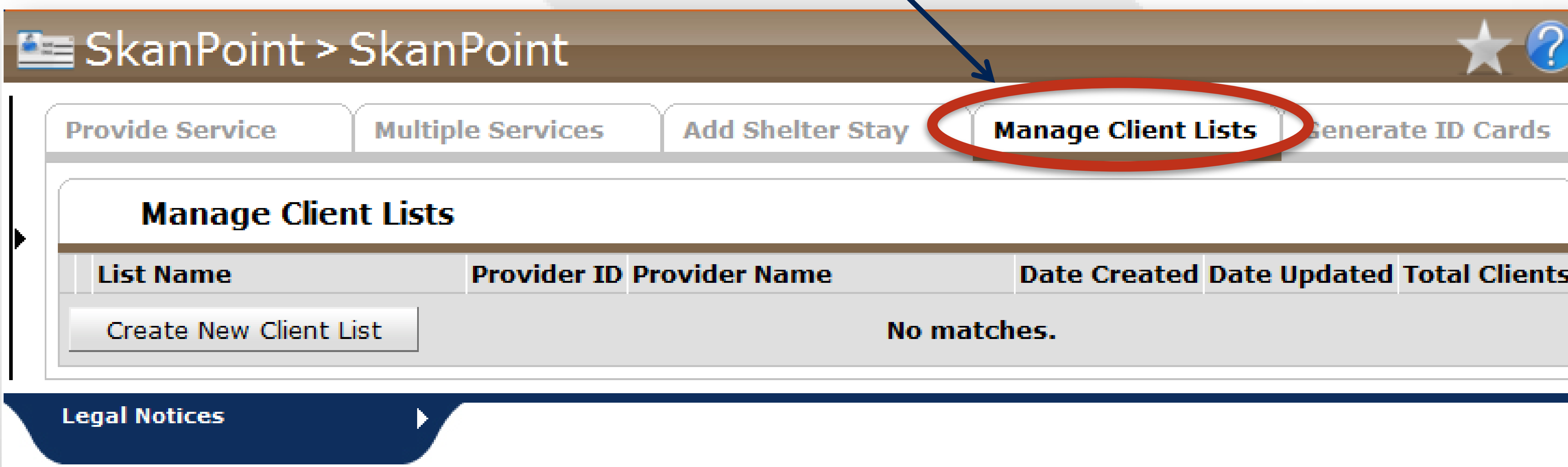


Collaborate. Coordinate. Evaluate.

Workflow #2:

Managing Client List(s)

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



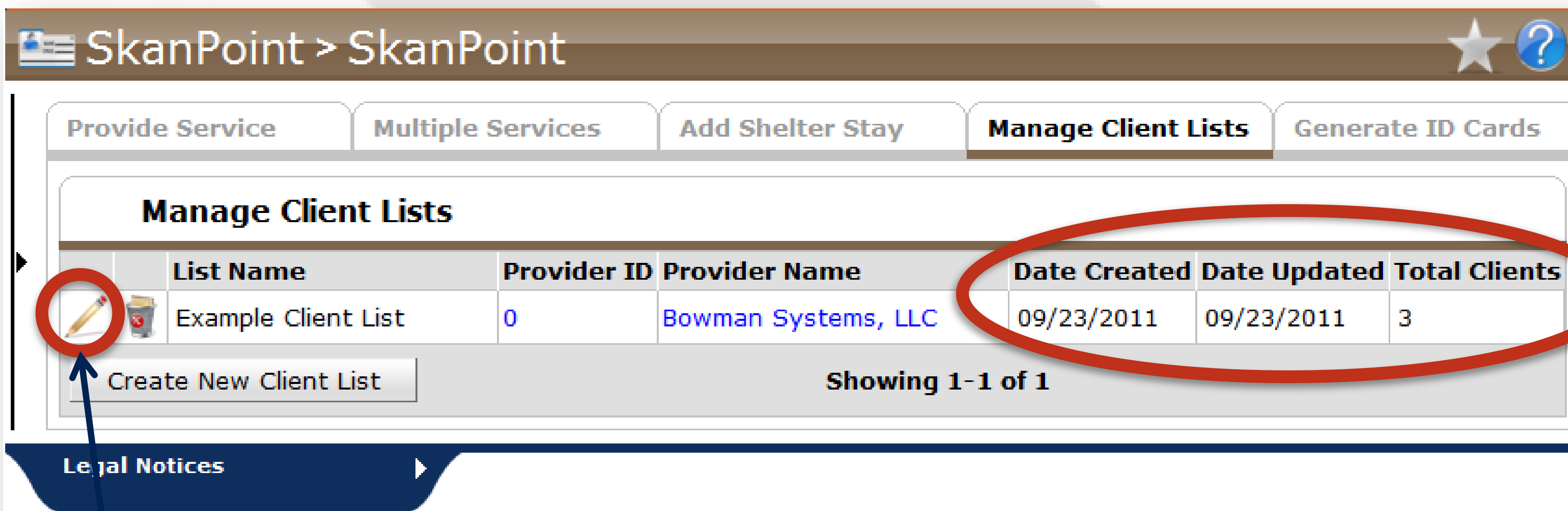
Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.*



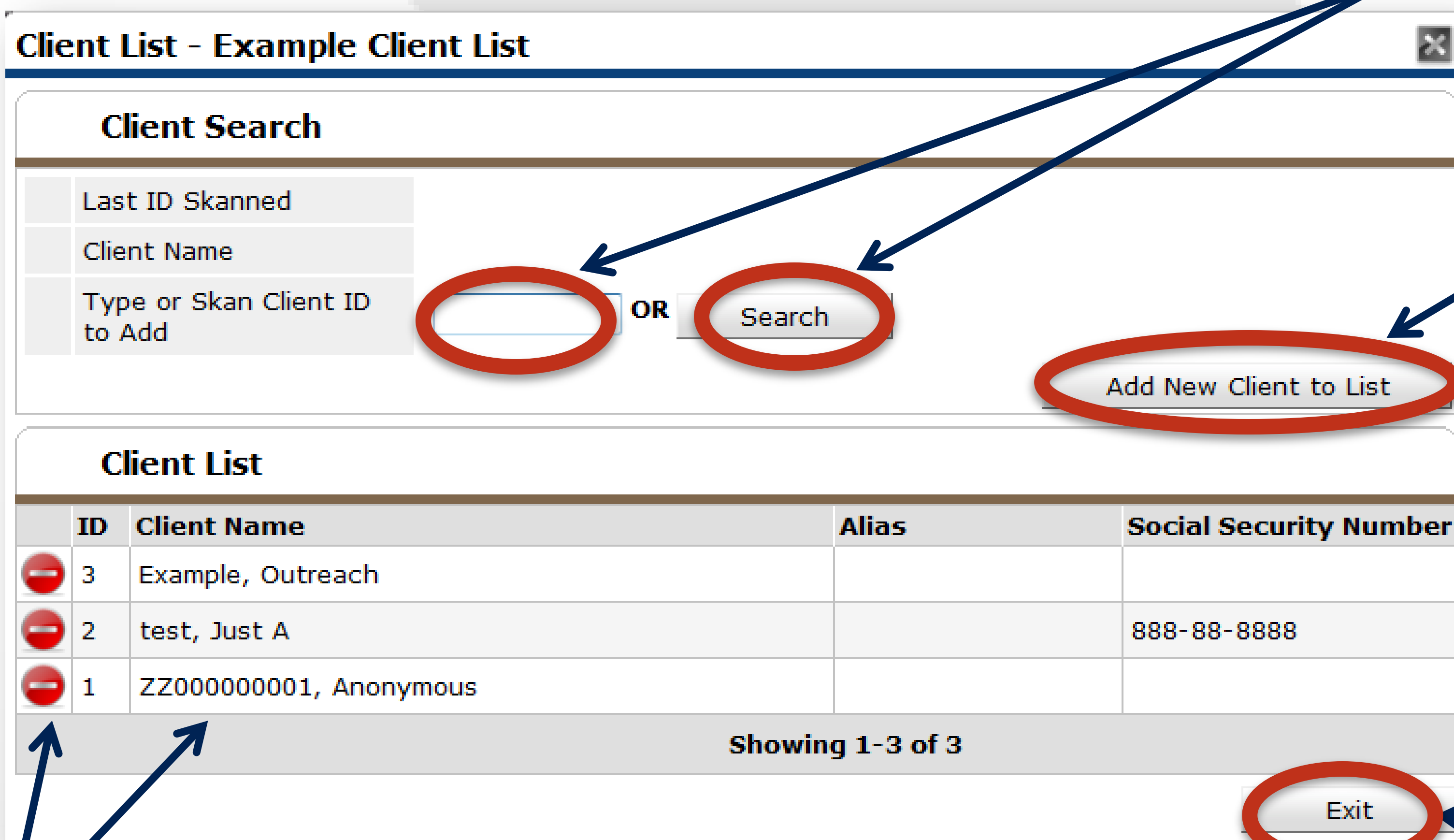
STEP 2: Single left-click the **Pencil/Edit Icon** button to revise your existing Client List, by either adding or removing individual Clients.

Collaborate. Coordinate. Evaluate.

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.



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

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

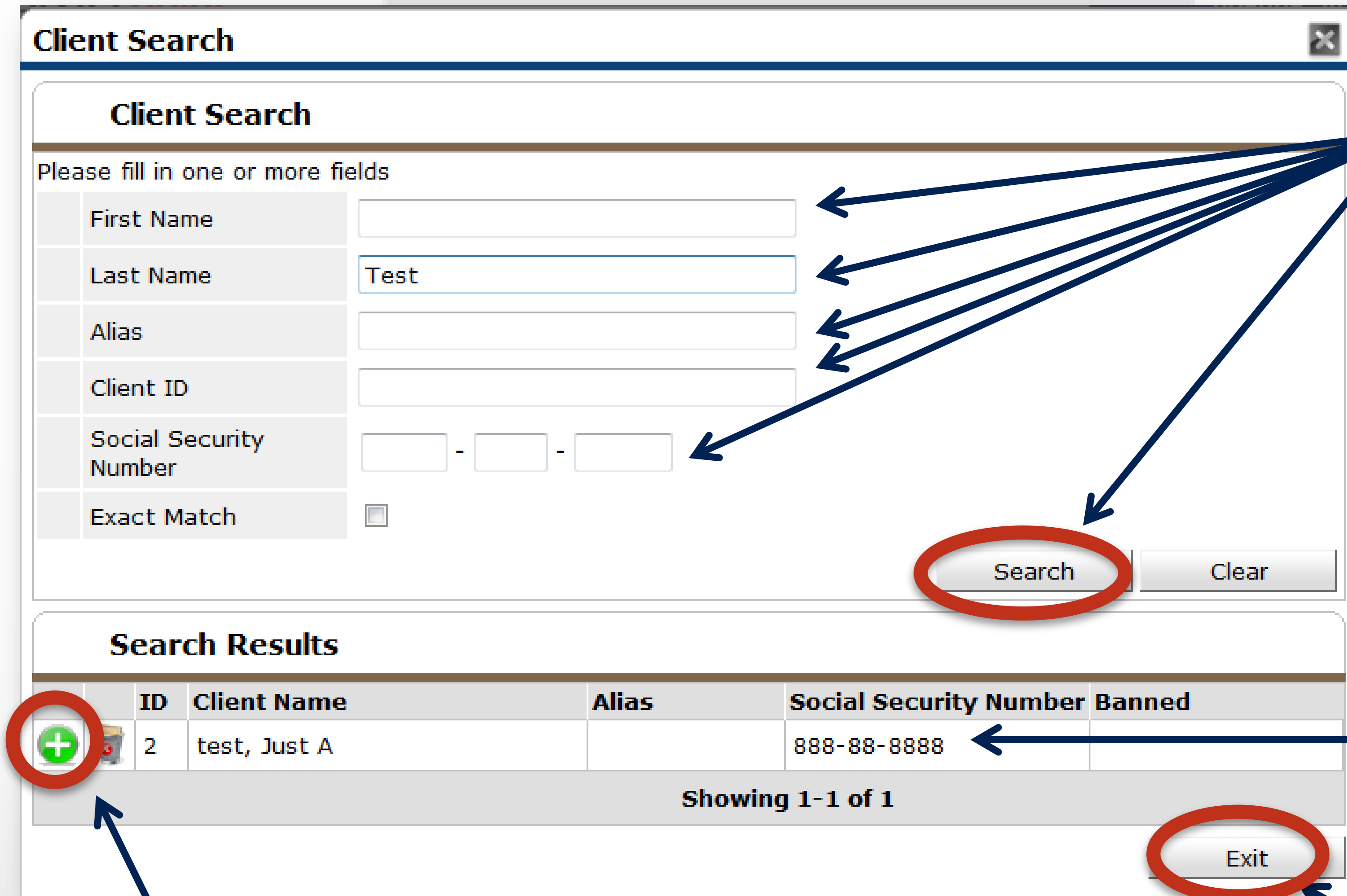
STEP 4 Note: *Clients that have been added to the list will appear under the "Client List" section. If a Client needs to be removed from the list, the Client can easily be dropped from the list by single left-clicking the **Red Minus Symbol** located to the left of the Client ID Number & Name.*

Collaborate. Coordinate. Evaluate.

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:*



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.

Collaborate. Coordinate. Evaluate.

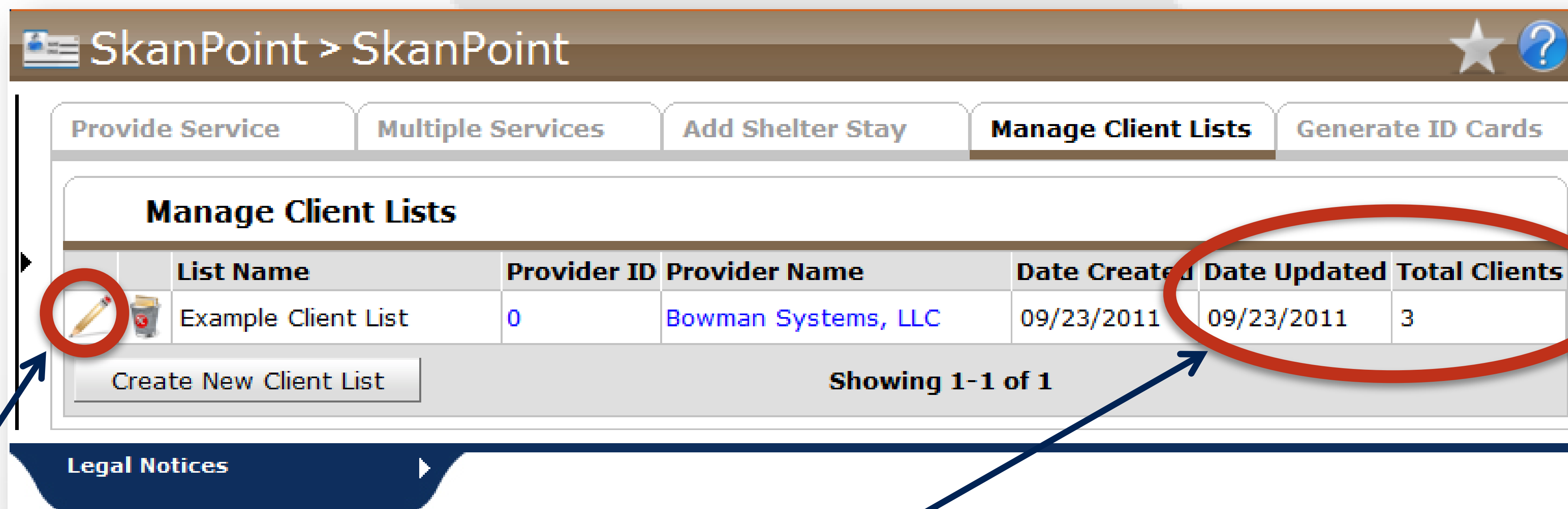
BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.*



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.

Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

SkanPoint Workflow #3

Generating Photo/Non-Photo ID Cards

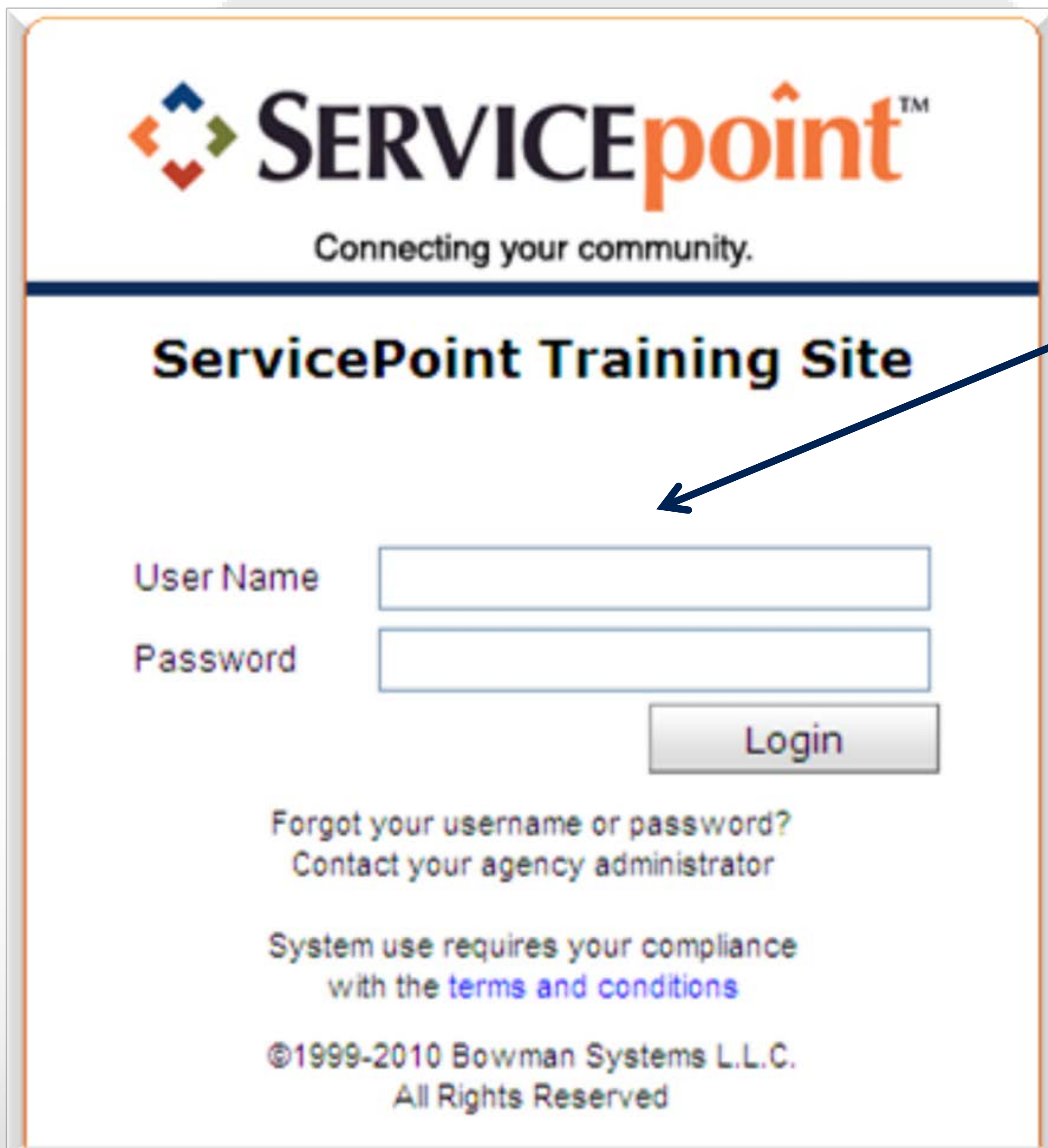
1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Generate ID Cards tab
4. Select an Existing Client List
5. Select the Desired Clients on your Existing Client List
6. Print the Client ID Cards

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint v5.5.1



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

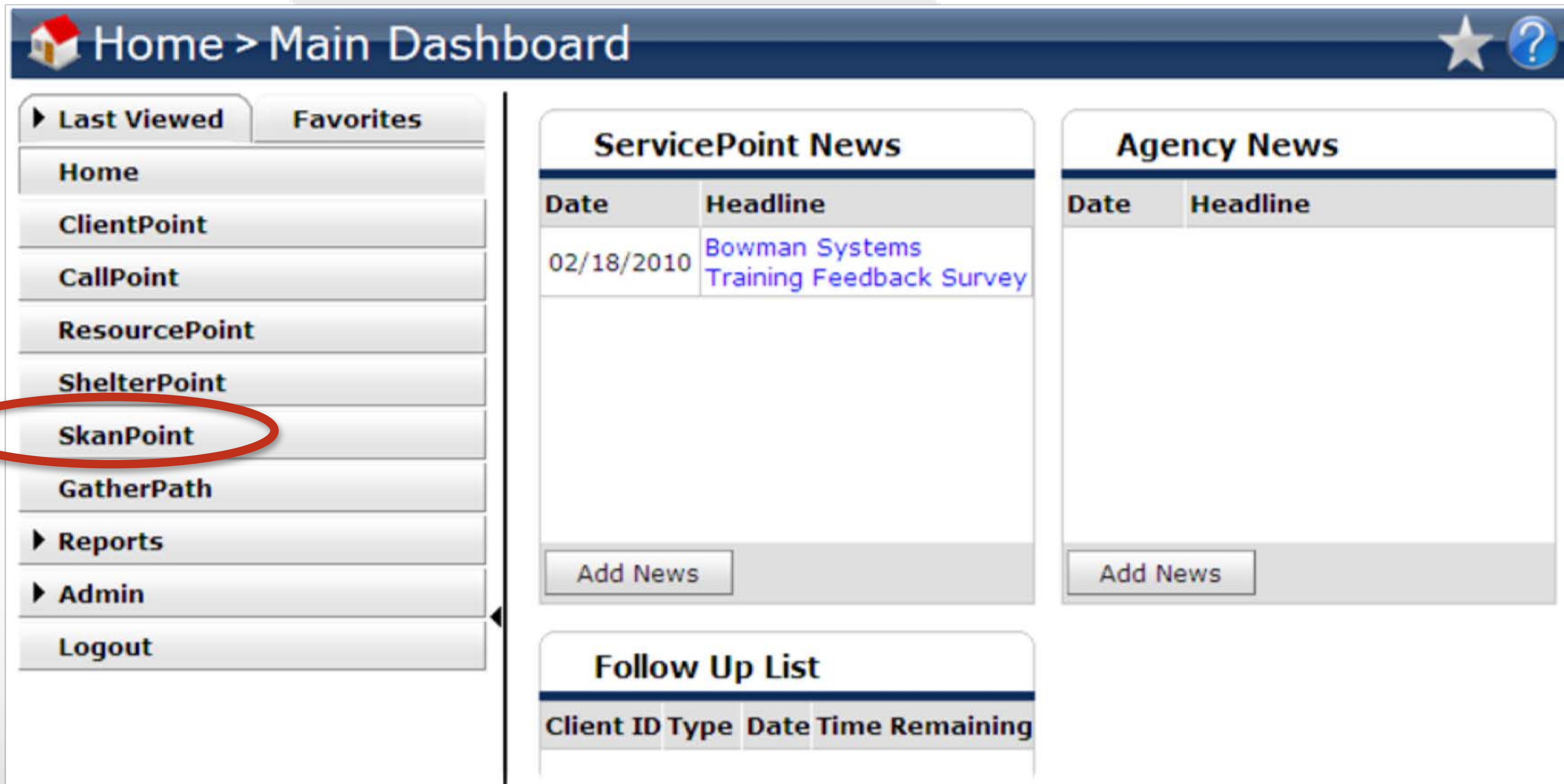
Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint*®.

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

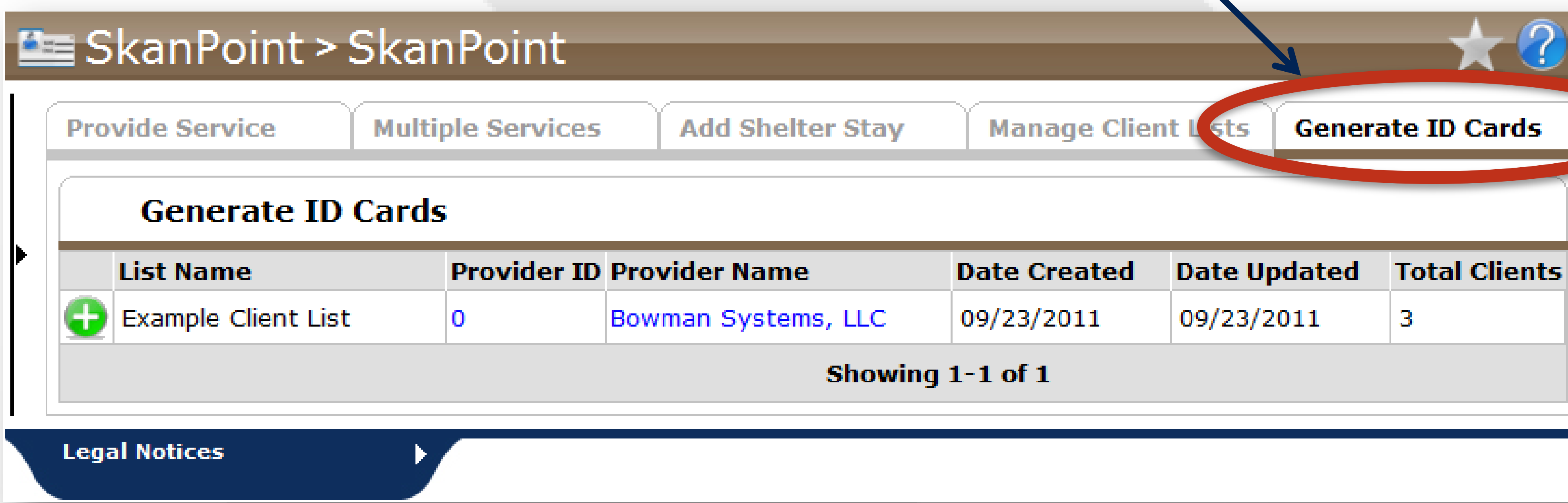
BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #3:

Generating Client ID Card(s)

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



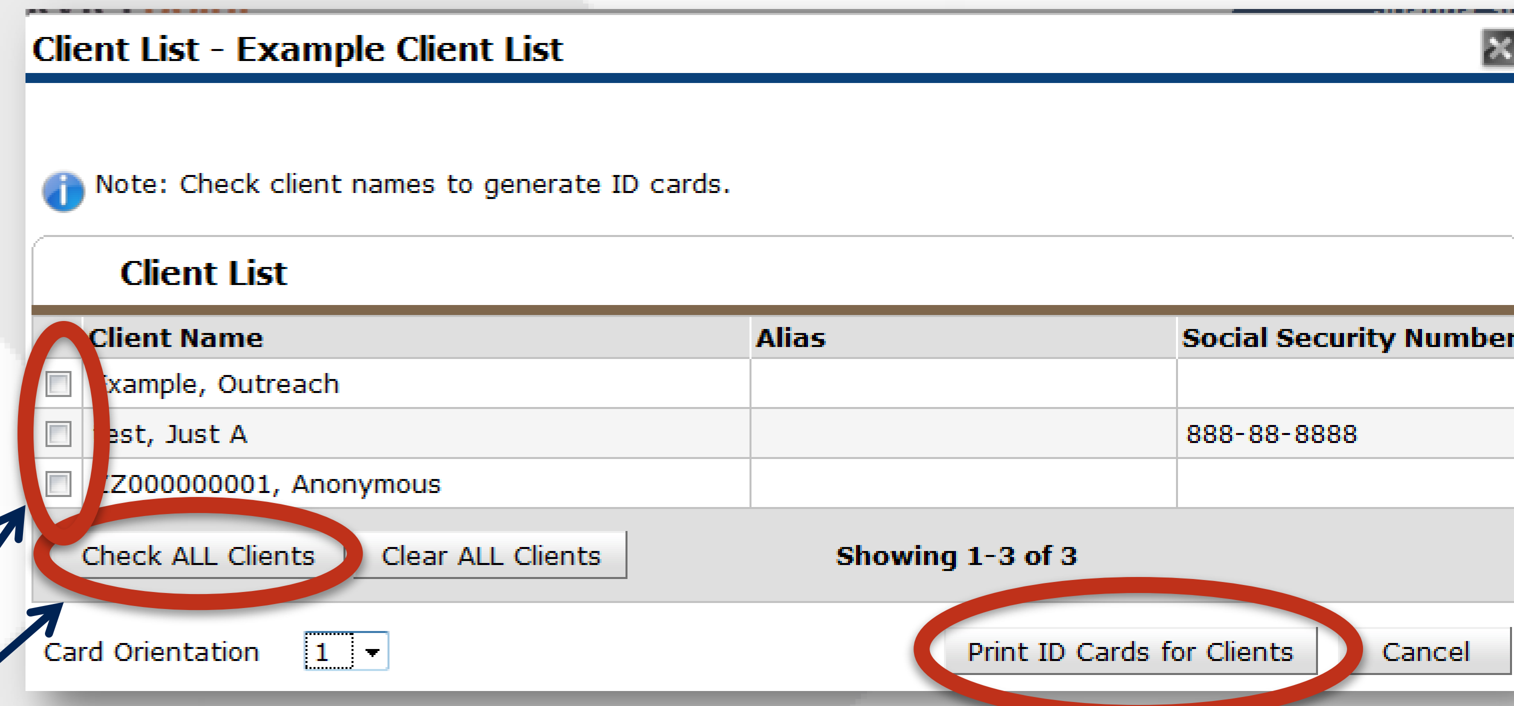
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #3:

Generating Client ID Card(s)



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.

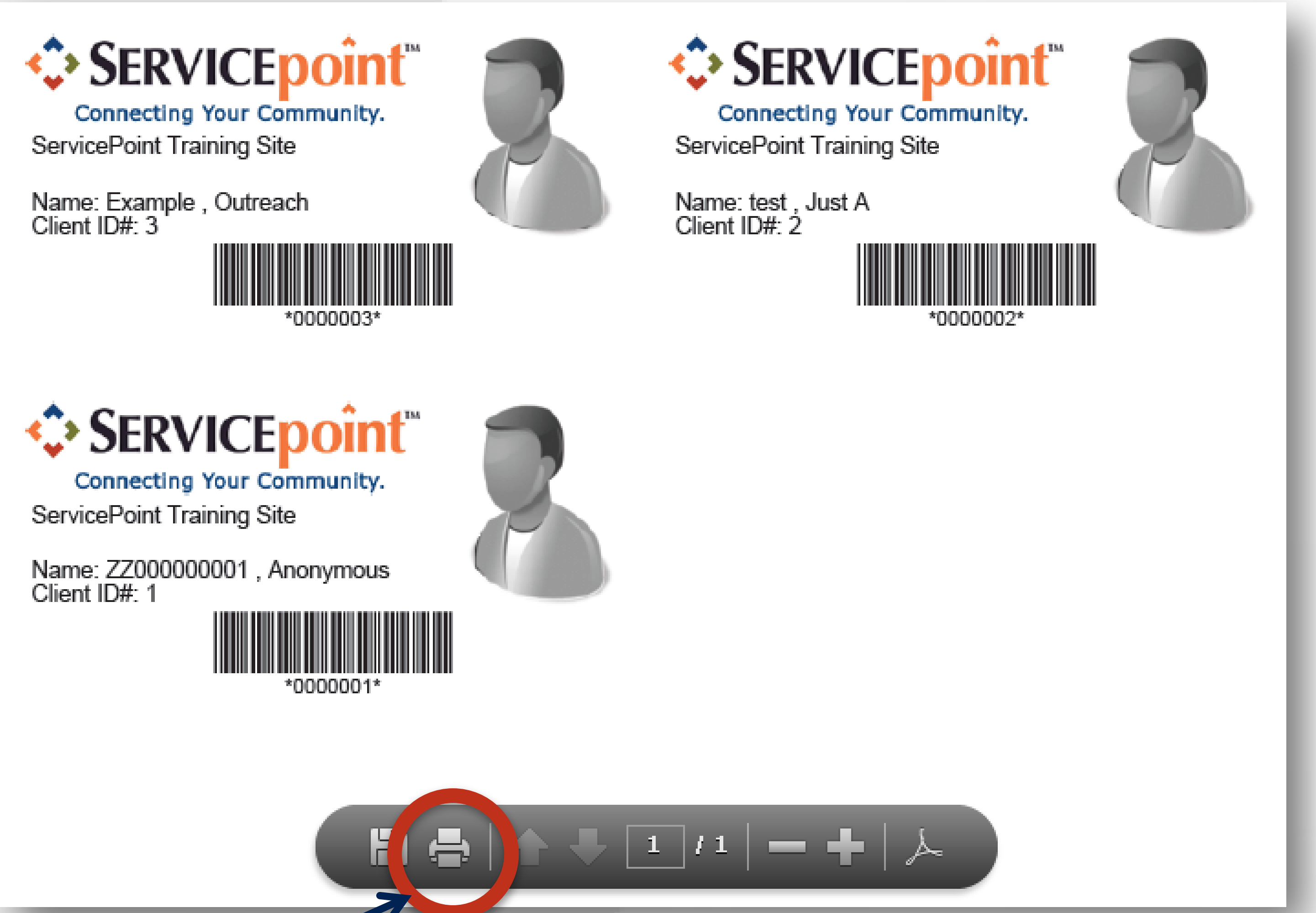
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #3:

Generating Client ID Card(s)



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

Collaborate. Coordinate. Evaluate.

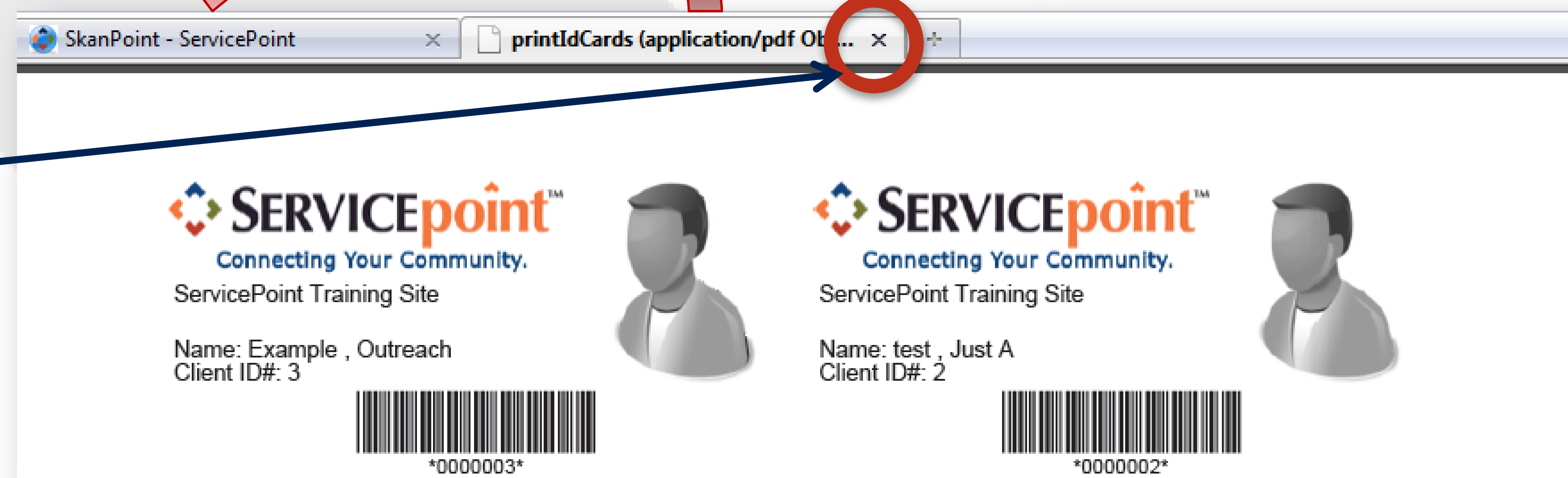
BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #3:

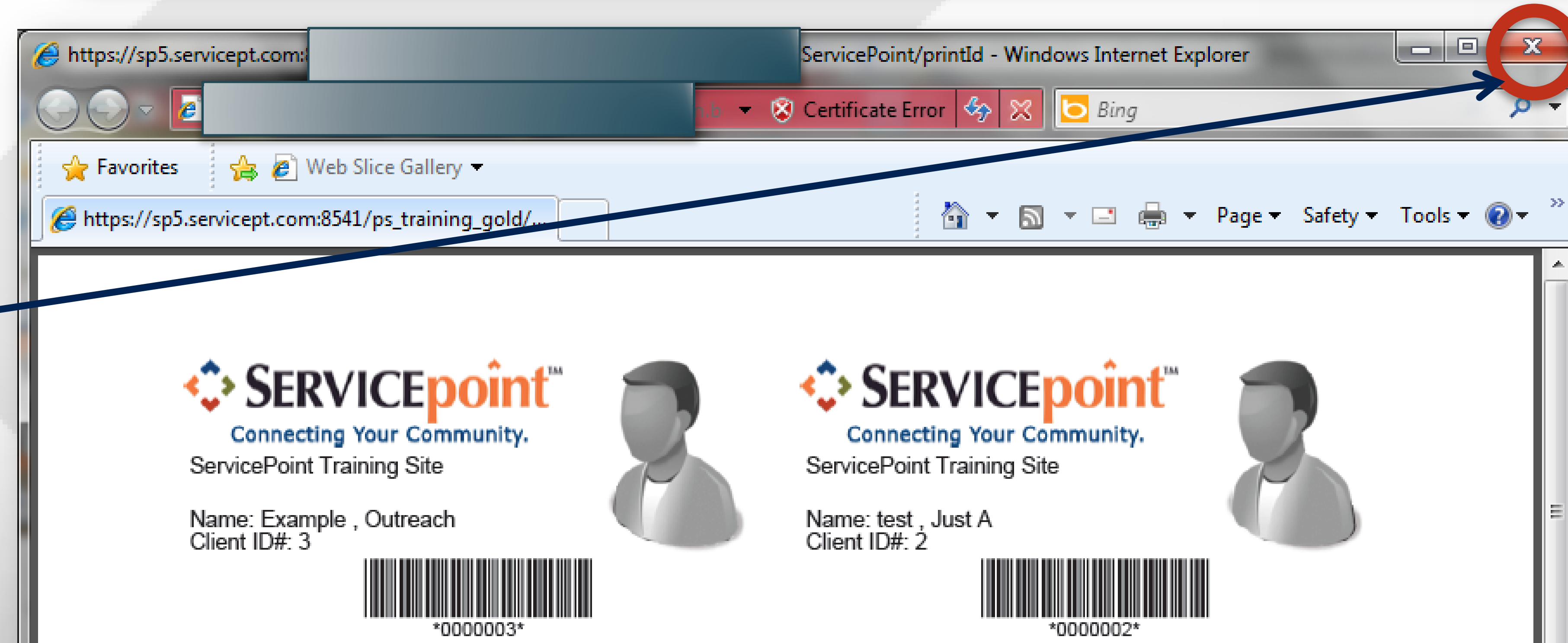
Generating Client ID Card(s)

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

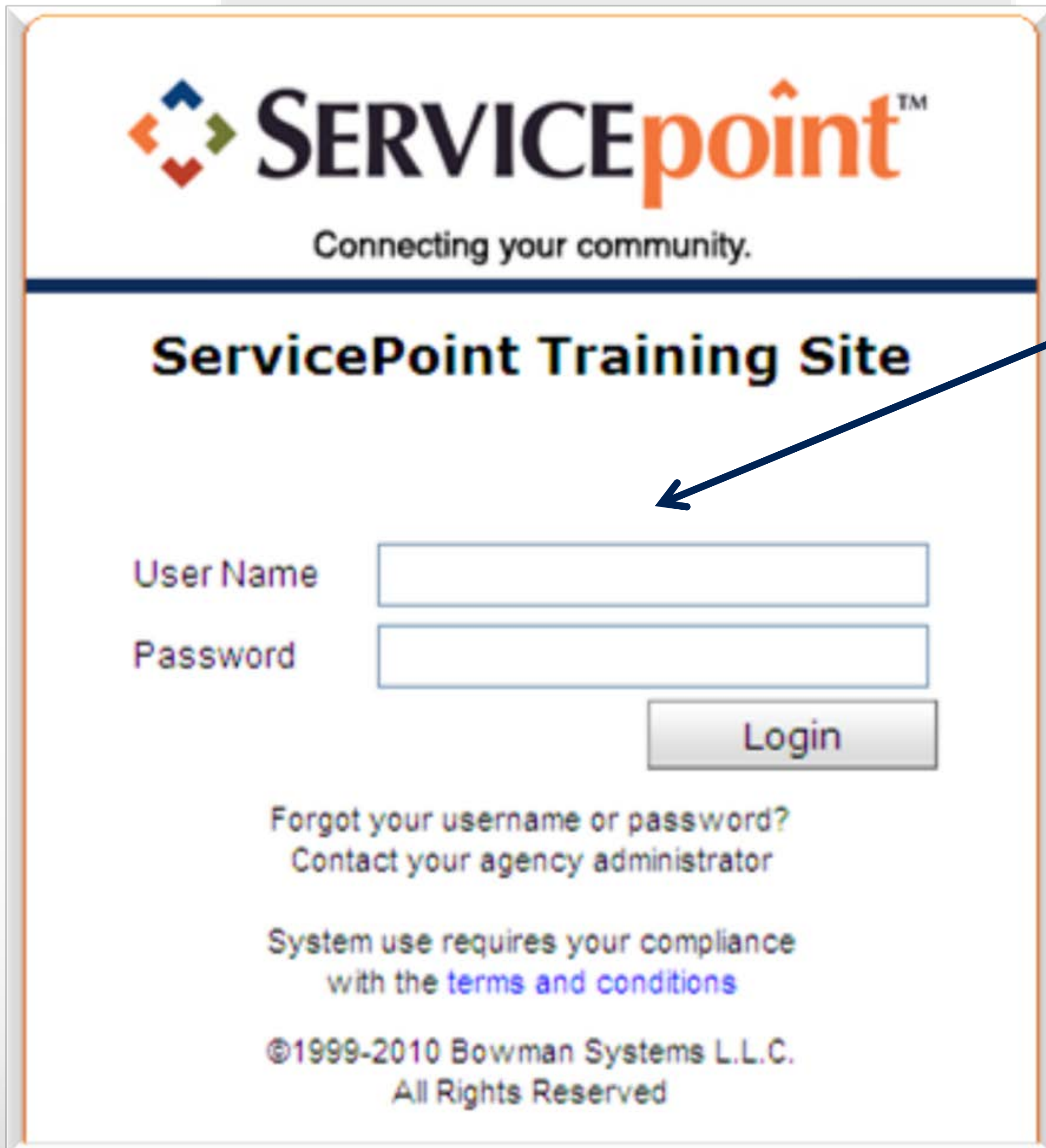
1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Provide Service tab
4. Input Service-related Transaction Information
5. Create a New Client List (optional)
6. Skan / Input Client ID Numbers
7. Review Client List & Record Services
8. Confirm Service Records were Made

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



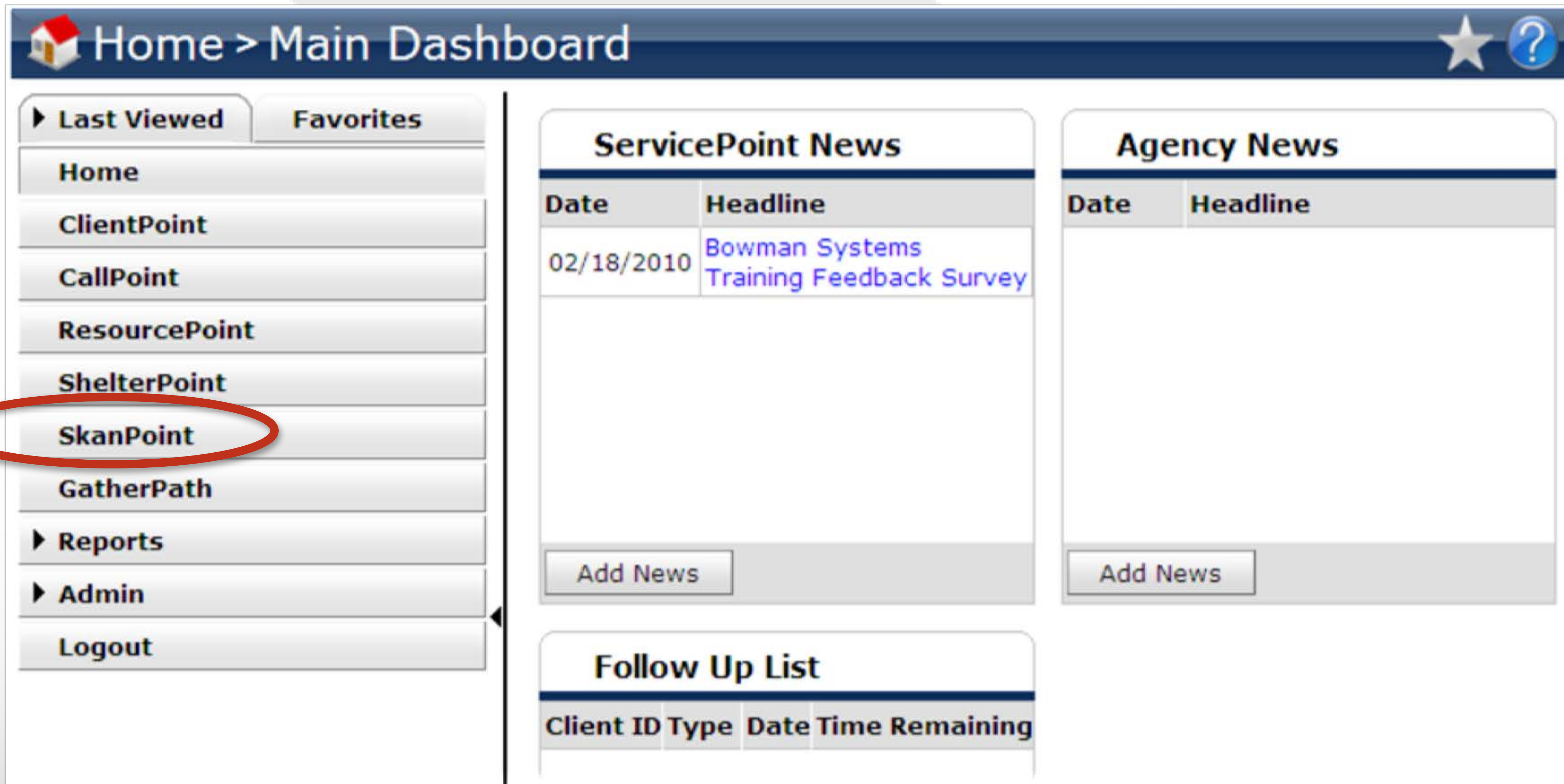
Begin by logging into *ServicePoint*® using your assigned Username & Password.

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

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

Connecting Communities > Demonstrating Outcomes™

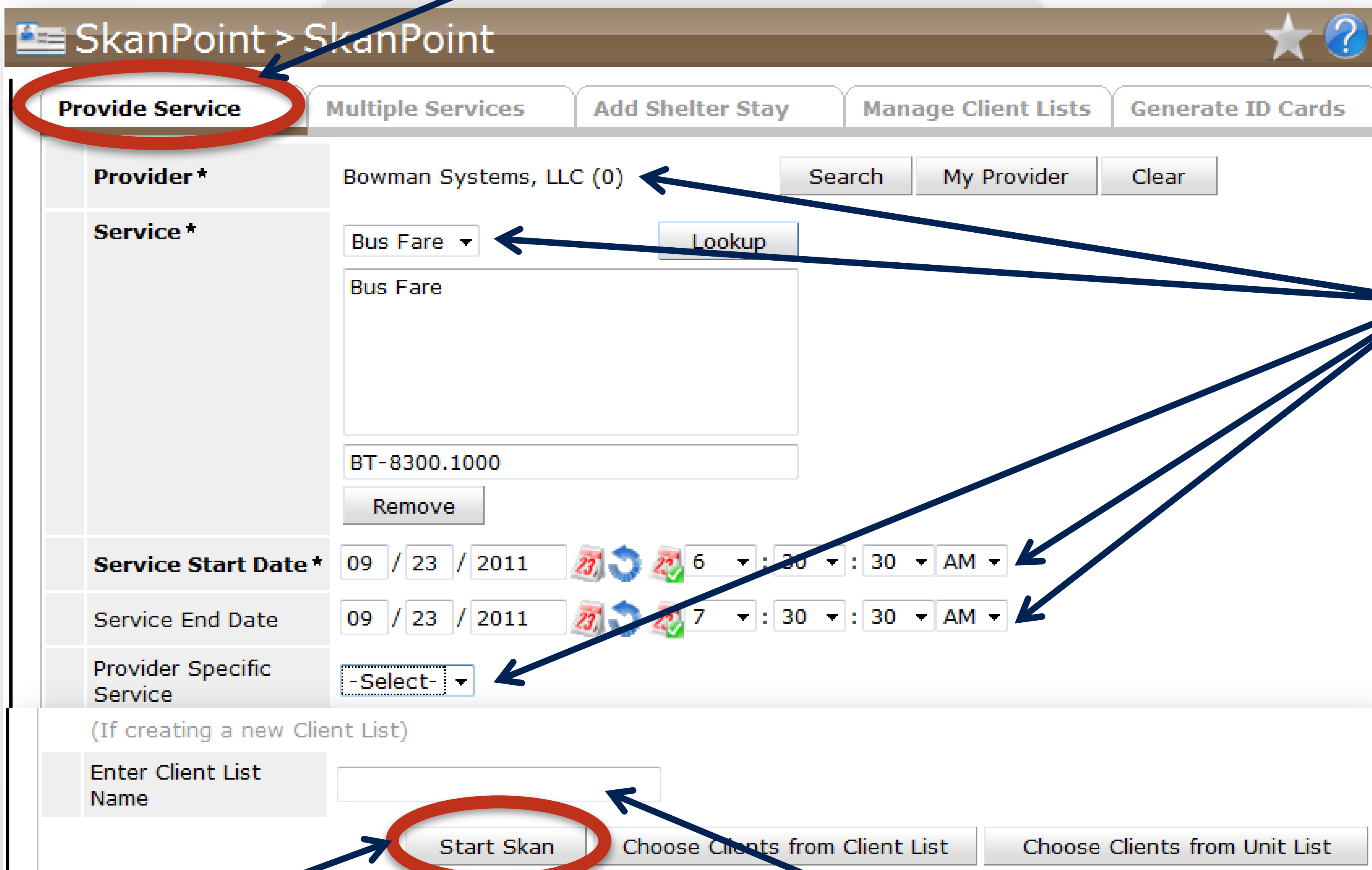
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.*

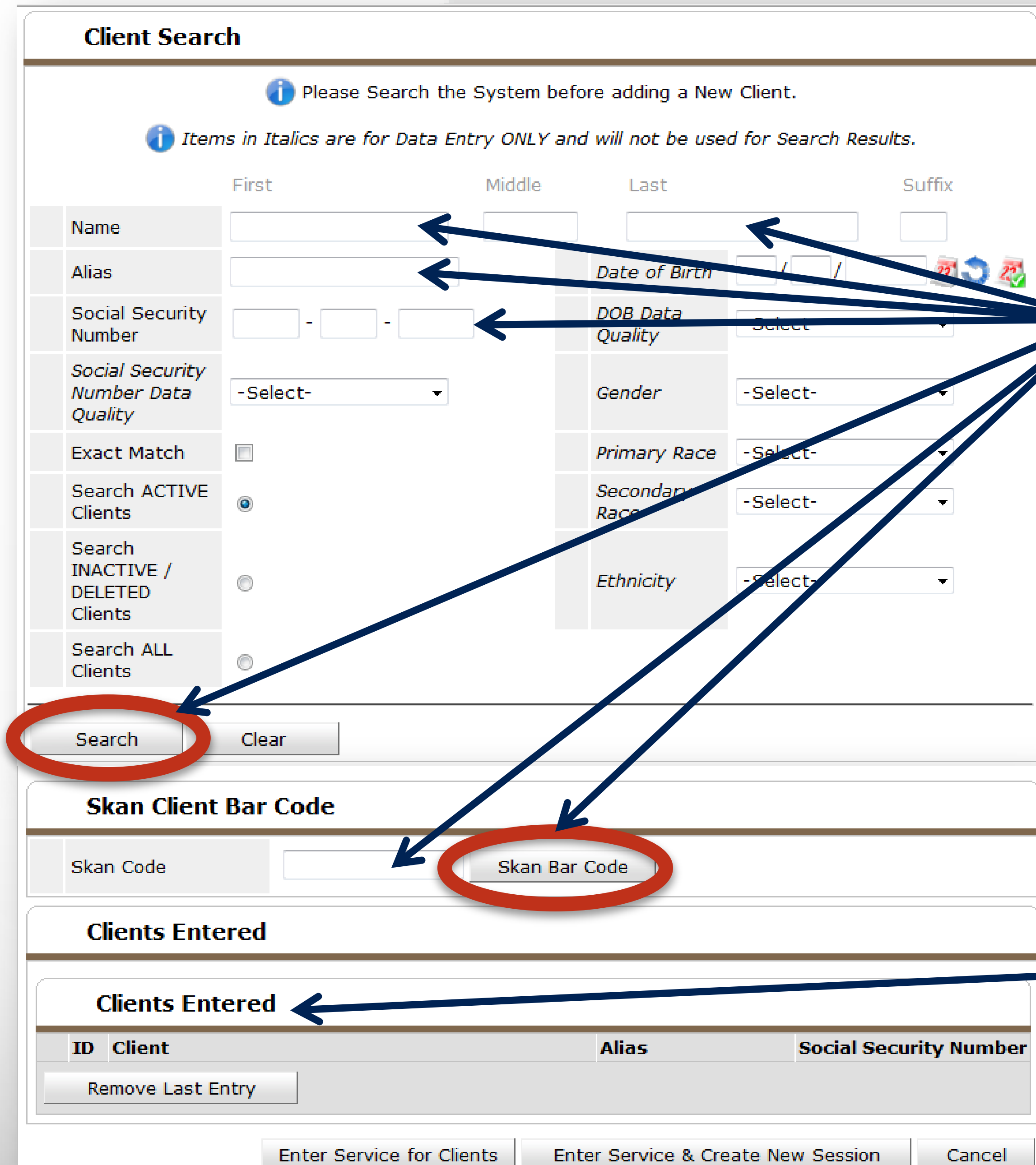
STEP 3: To work from a new (possibly one-time-use) Client List, click the **Start Skan** button.

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.*

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Workflow #4a: Creating Bulk Single-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.

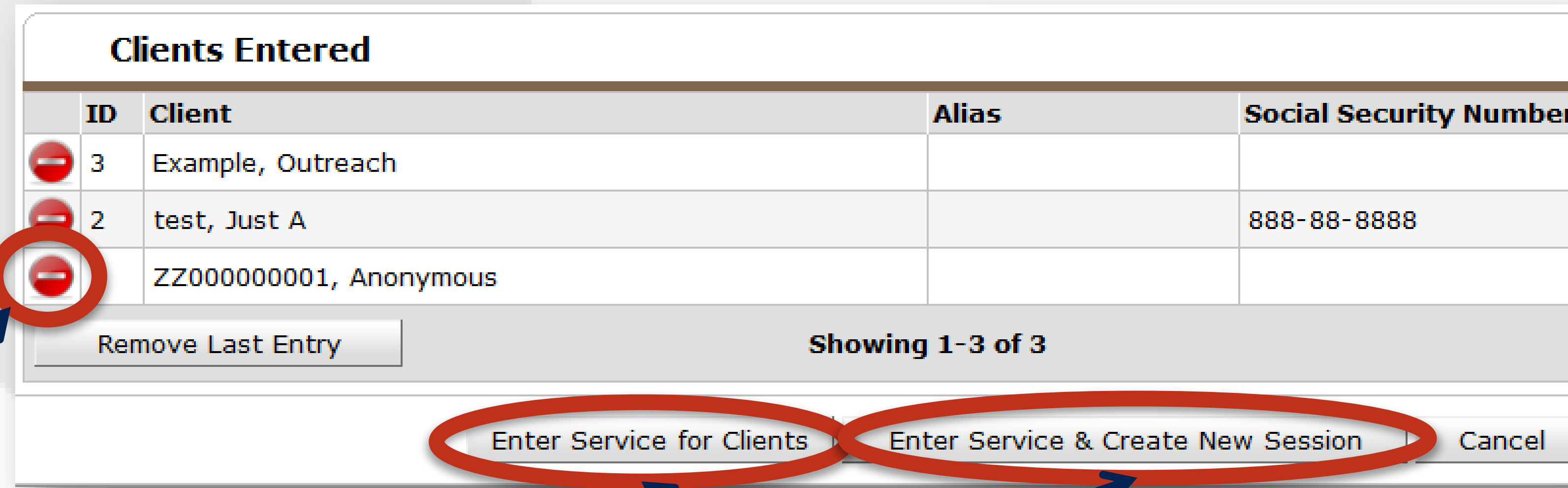
~ OR ~

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 #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.*

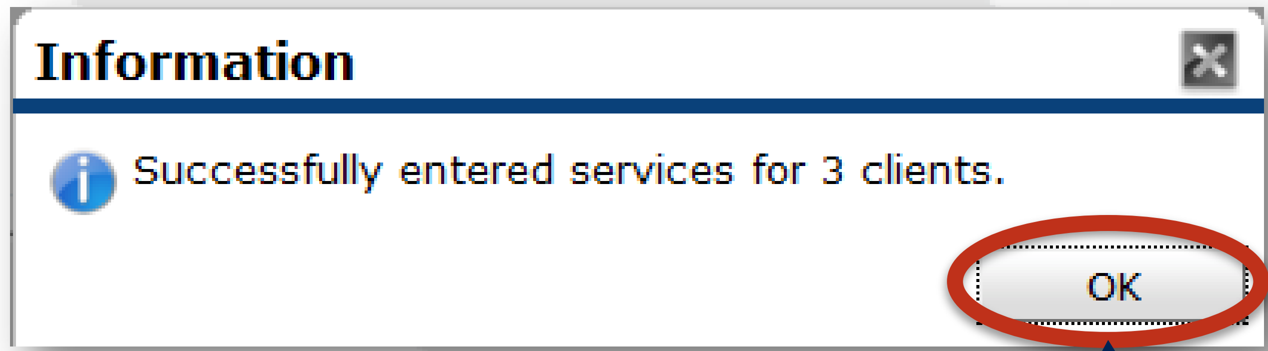


STEP 5: After all necessary Clients have been added to the list, click the **Enter Service for Clients** or the **Enter Service & Create New Session** button.

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.)*

Collaborate. Coordinate. Evaluate.

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.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint Workflow #4b

Creating Bulk Single-Service Transactions

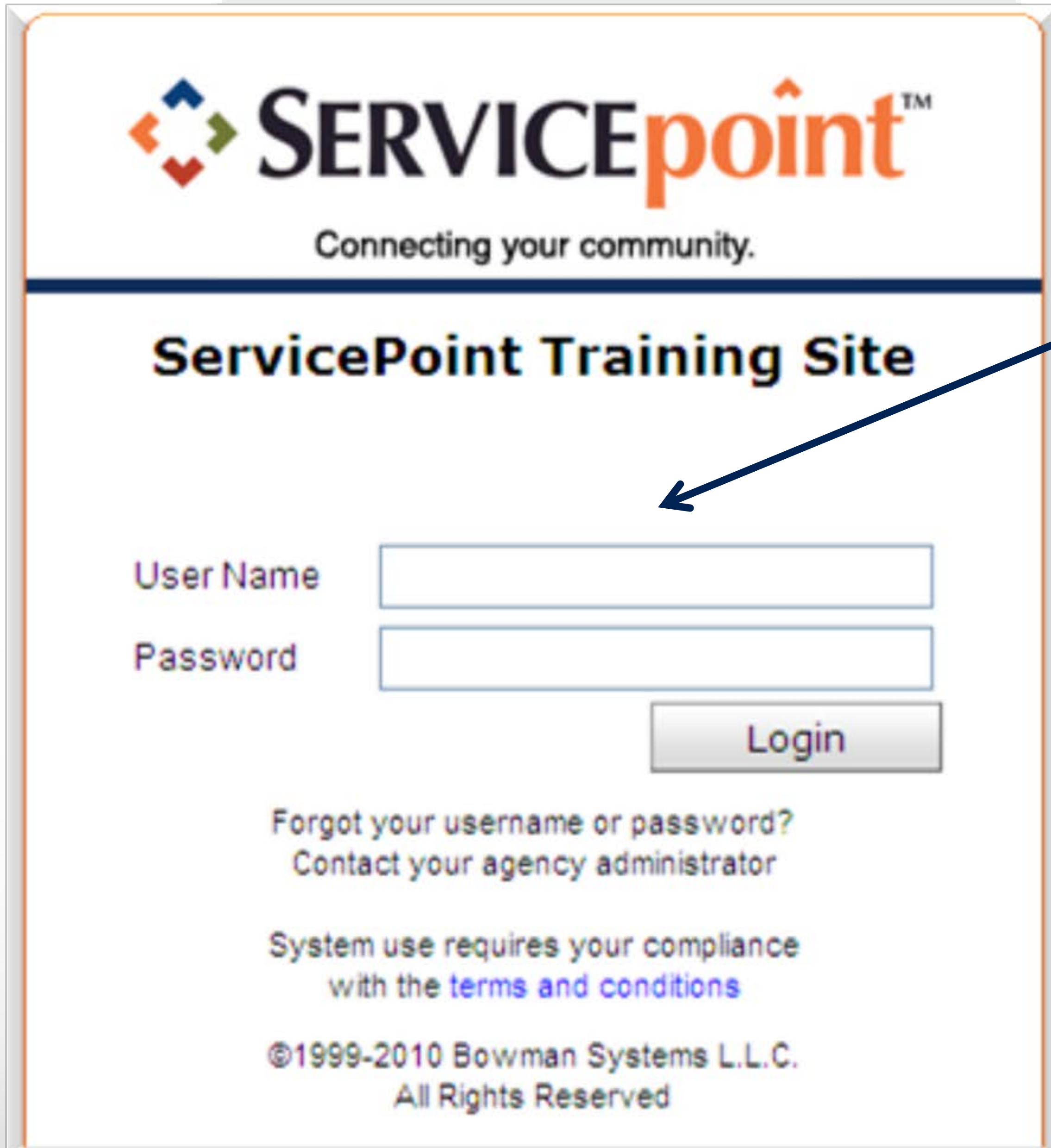
Login to ServicePoint > Open the SkanPoint Module > Click on the Provide Service tab > Input Service-related Transaction Information > Select an Existing Client List > Review Client List & Record Services > Confirm Service Records were Made

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



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*®.

SkanPoint v5.5.1

Collaborate. Coordinate. Evaluate.

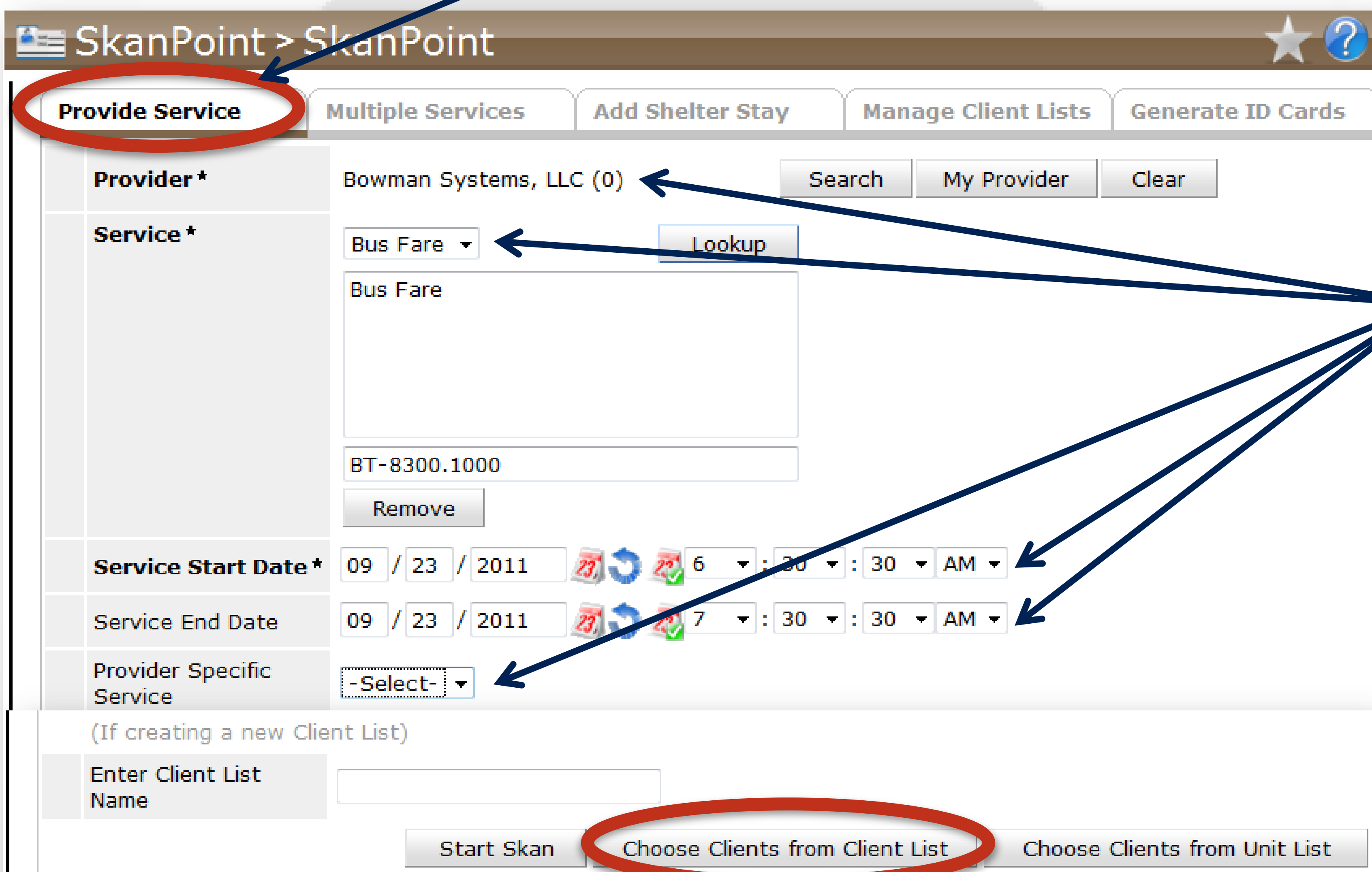
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

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

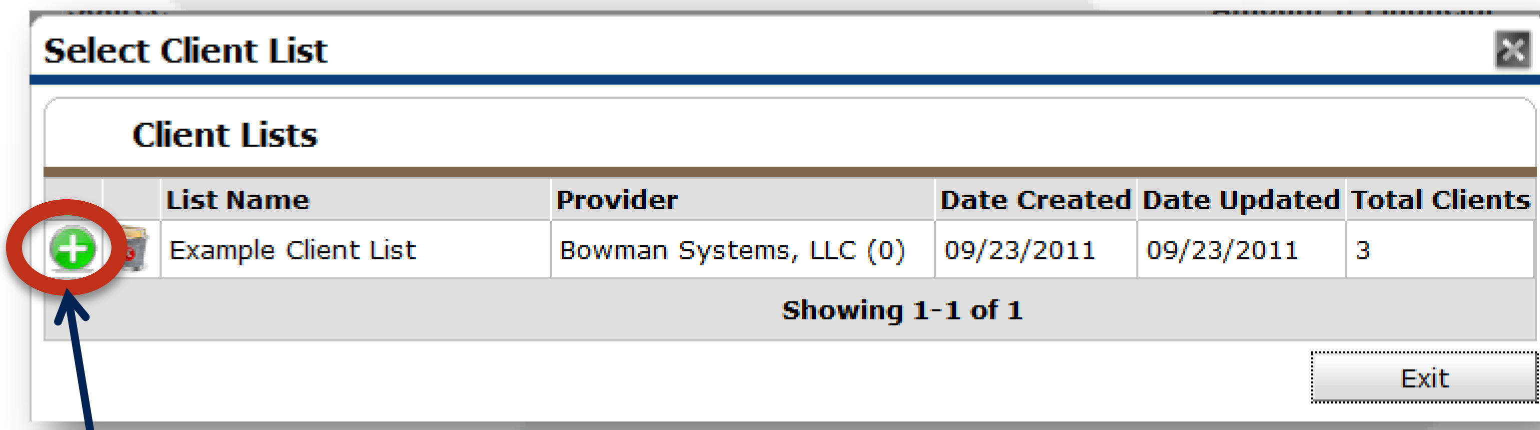


STEP 2: Work your way down from the top of the screen to the bottom, filling-in the appropriate service-related fields. Make sure to give credit to the correct Service Provider.

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.

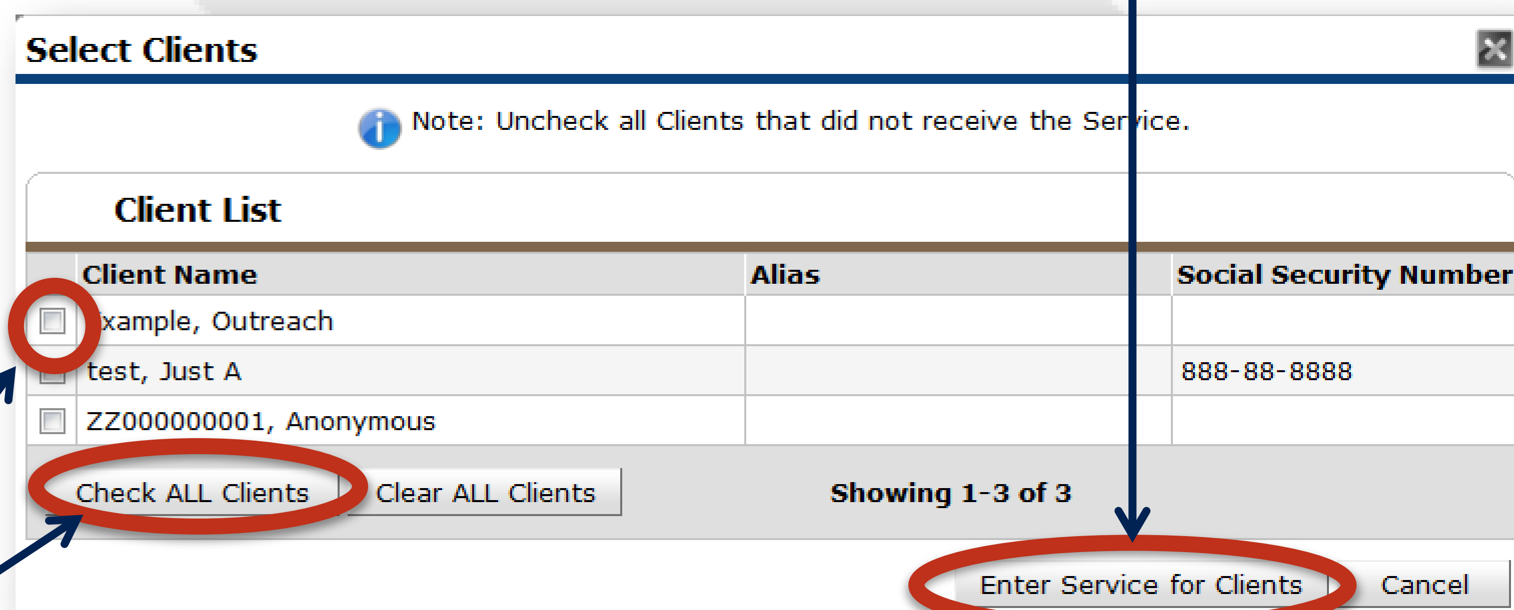
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.



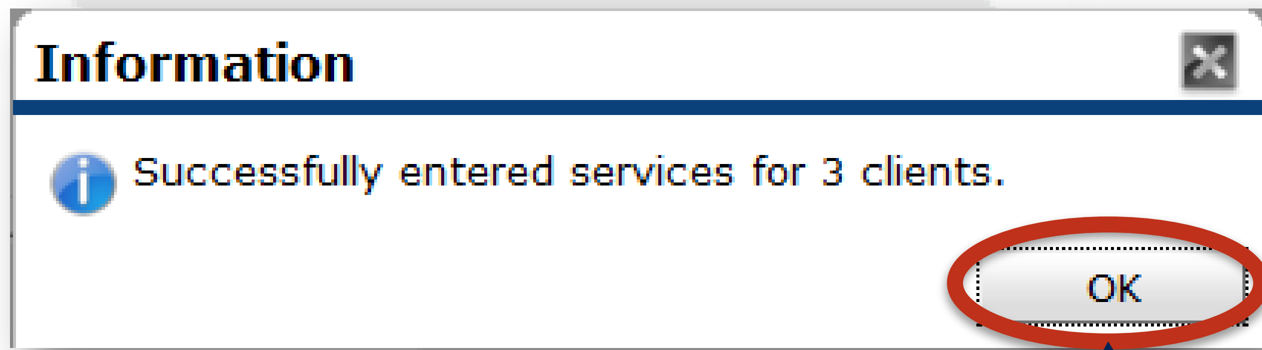
STEP 5: Select the desired Clients by either check-marking the boxes next to each individual Client’s name (with a single-left-click of the mouse), or by single-left-clicking the **Check ALL Clients** button. *Clients can be “un-selected” by removing the check-mark next to their individual names (again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

Collaborate. Coordinate. Evaluate.

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

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services



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

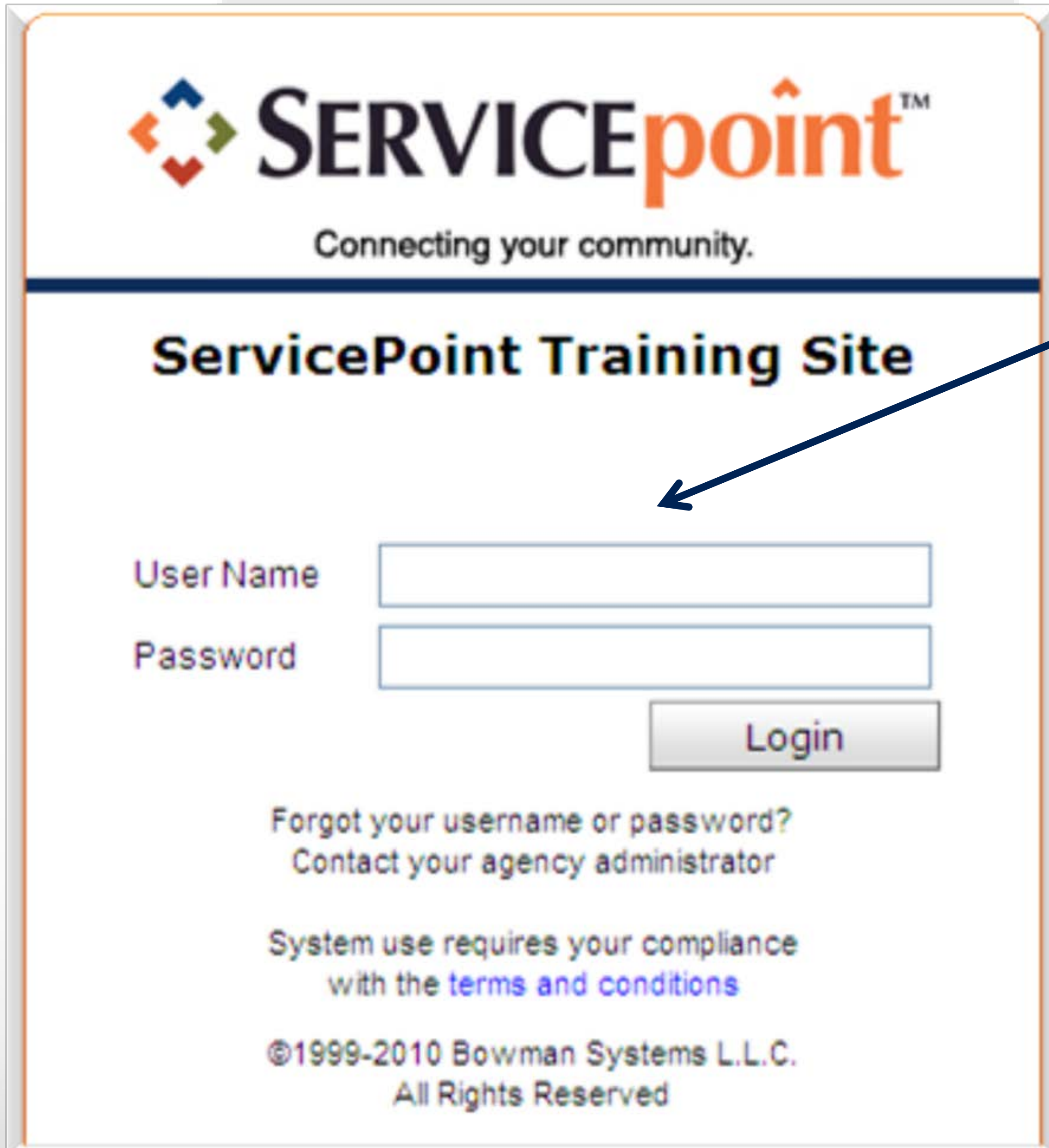
Creating Bulk Single-Service Transactions

1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Provide Service tab
4. Input Service-related Transaction Information
5. Select an Existing Unit List
6. Select Clients & Record Services
7. Confirm Service Records were Made

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint v5.5.1



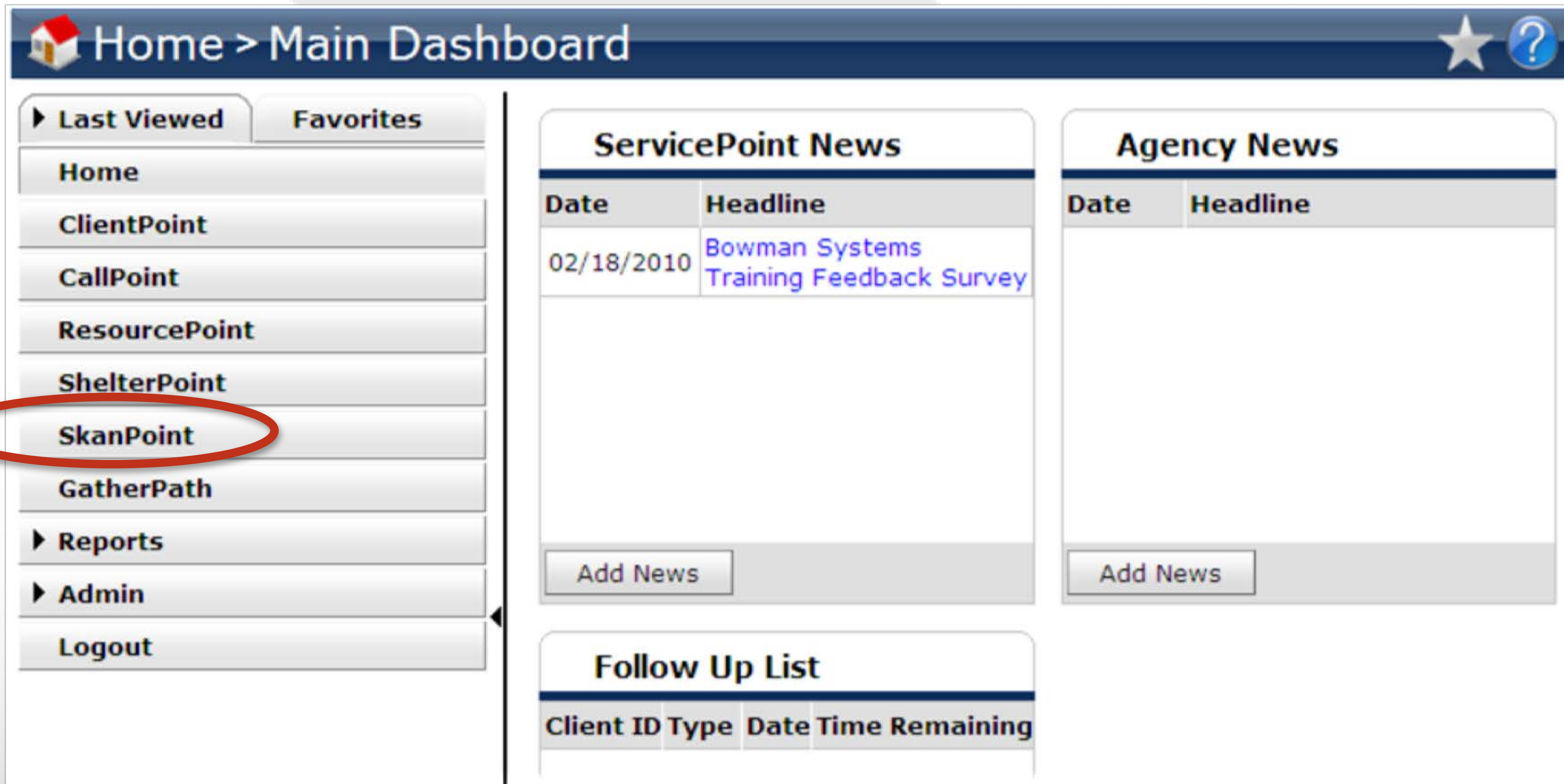
Begin by logging into *ServicePoint*® using your assigned Username & Password.

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

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

Connecting Communities > Demonstrating Outcomes™

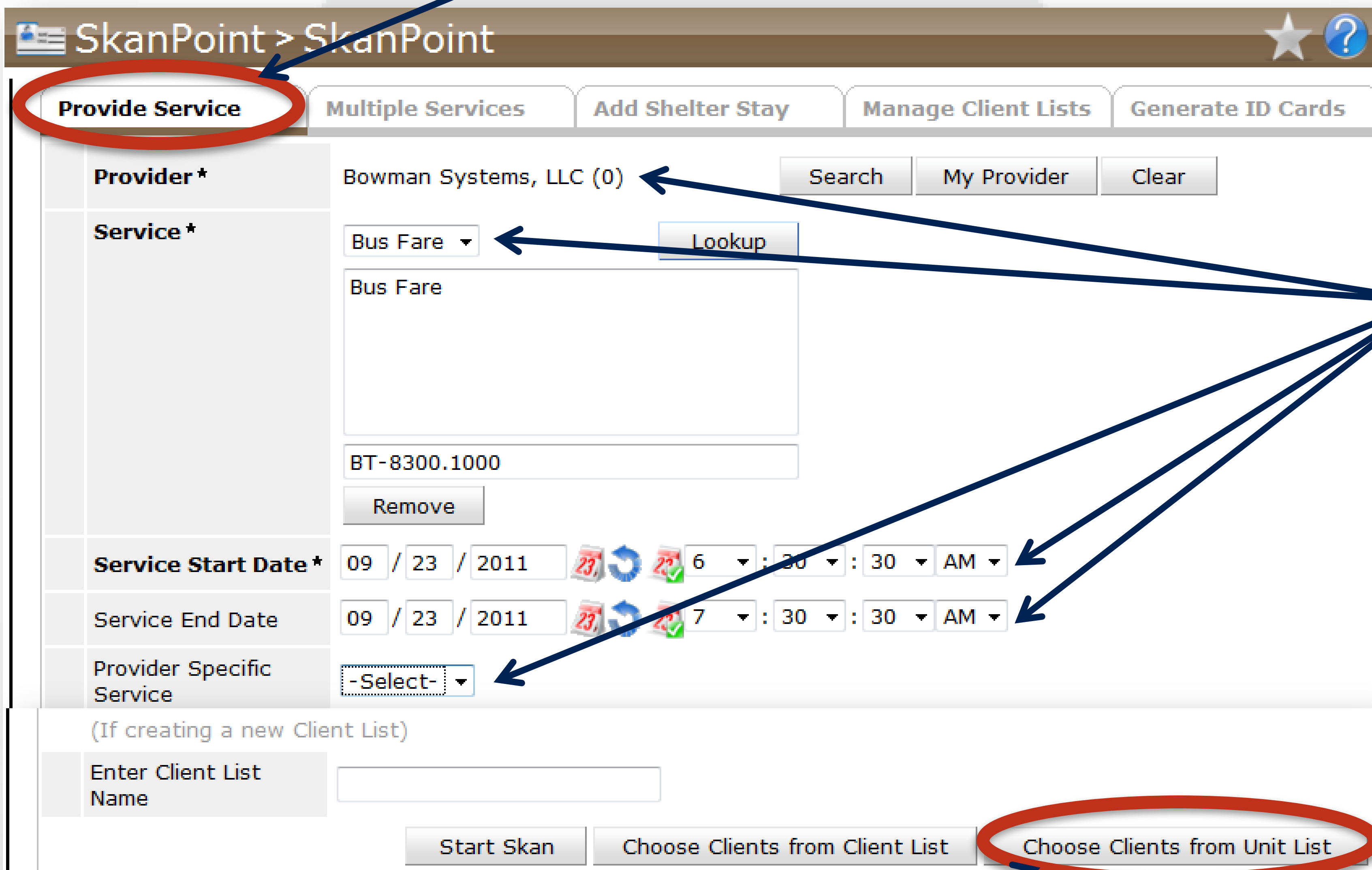
Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

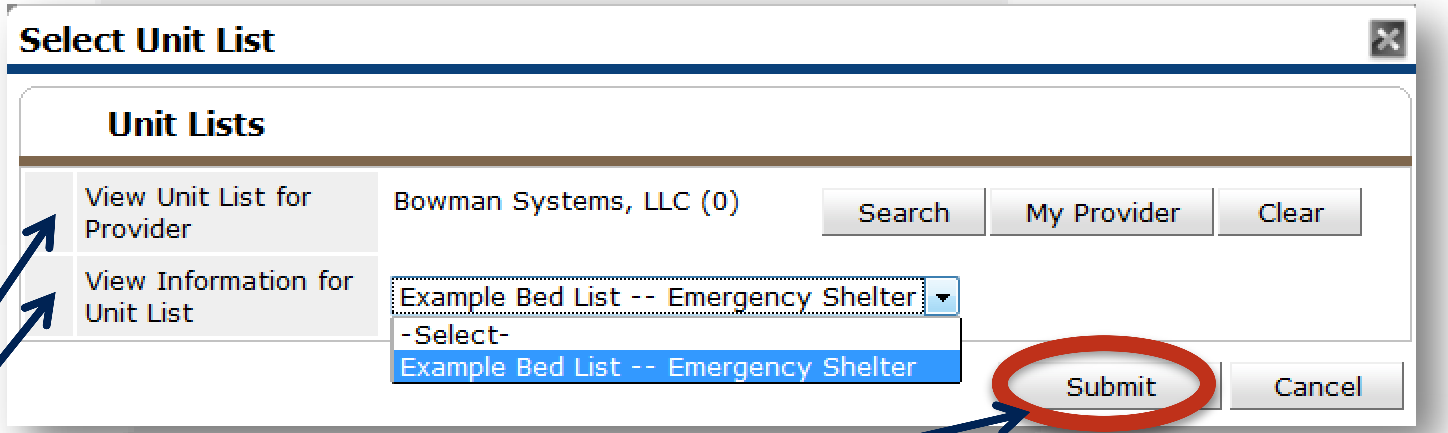
STEP 3: To work from an existing Unit List, click the **Choose Clients from Unit List** button.

Collaborate. Coordinate. Evaluate.

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

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

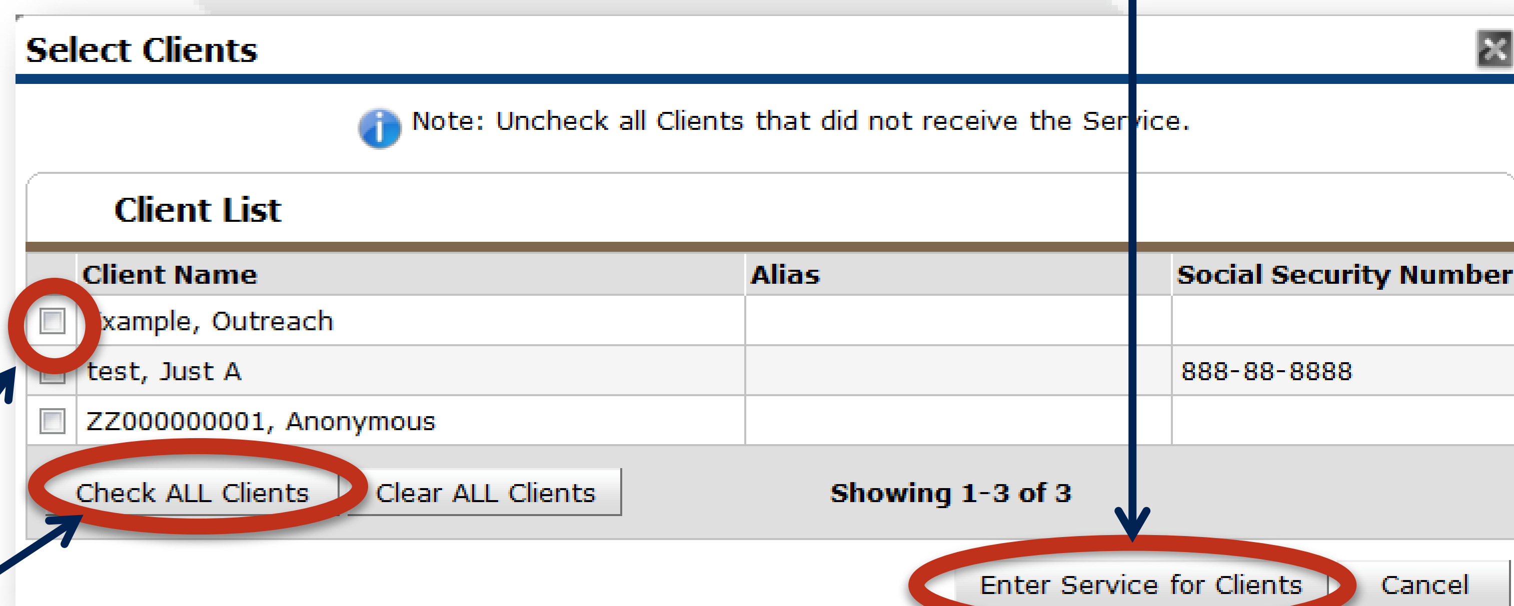


STEP 4: Select a **Unit List Provider**, then select a **Unit List** for the Provider, then click the **Submit** button.

Collaborate. Coordinate. Evaluate.

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

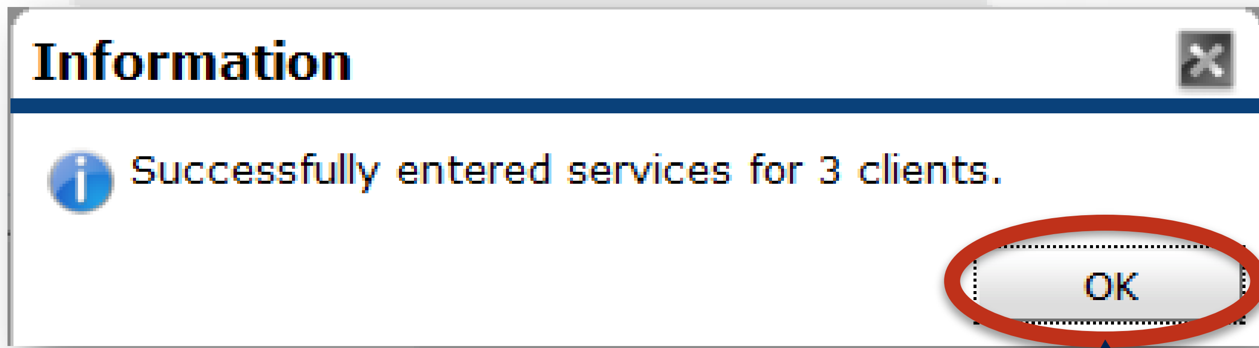
STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.



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).*

Collaborate. Coordinate. Evaluate.

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.

Collaborate. Coordinate. Evaluate.

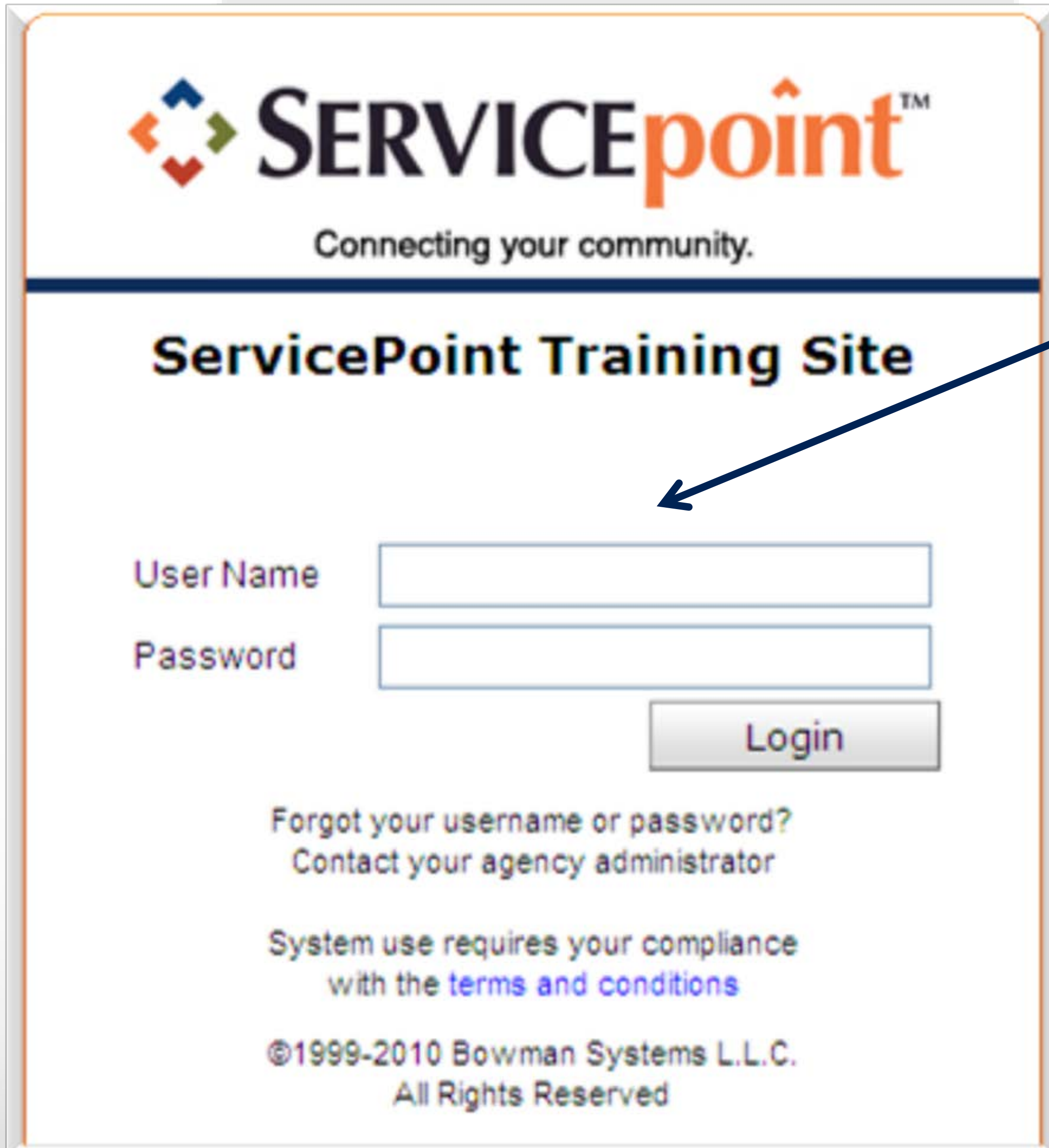
SkanPoint Workflow #5a

Creating Bulk Multiple-Service Transactions

1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Multiple Services tab
4. Input Service-related Transaction Information
5. Create a New Client List (optional)
6. Skan / Input Client ID Numbers
7. Review Client List & Record Services
8. Confirm Service Records were Made

Collaborate. Coordinate. Evaluate.

SkanPoint v5.5.1

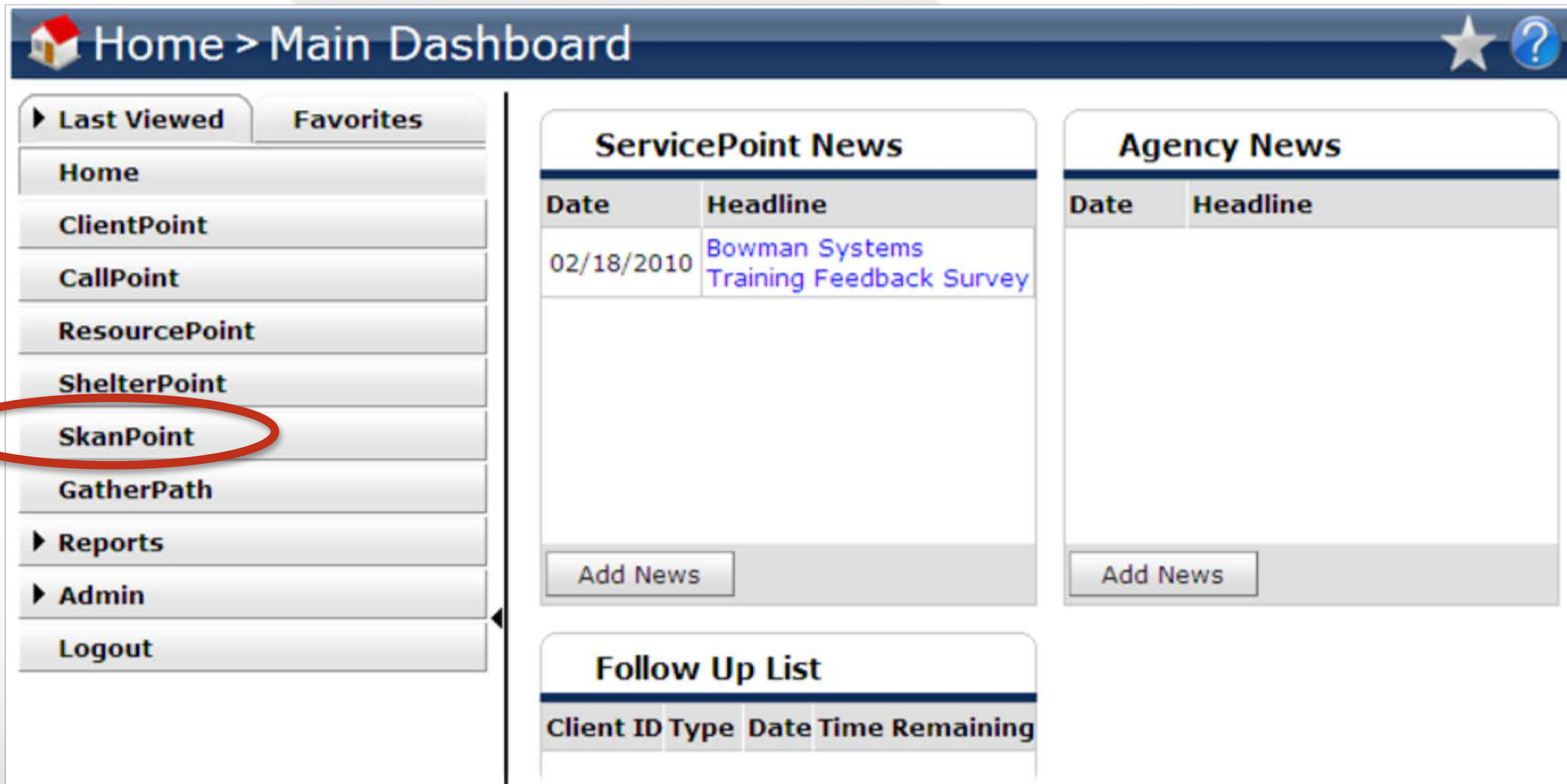


Begin by logging into *ServicePoint®* using your assigned Username & Password.

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

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



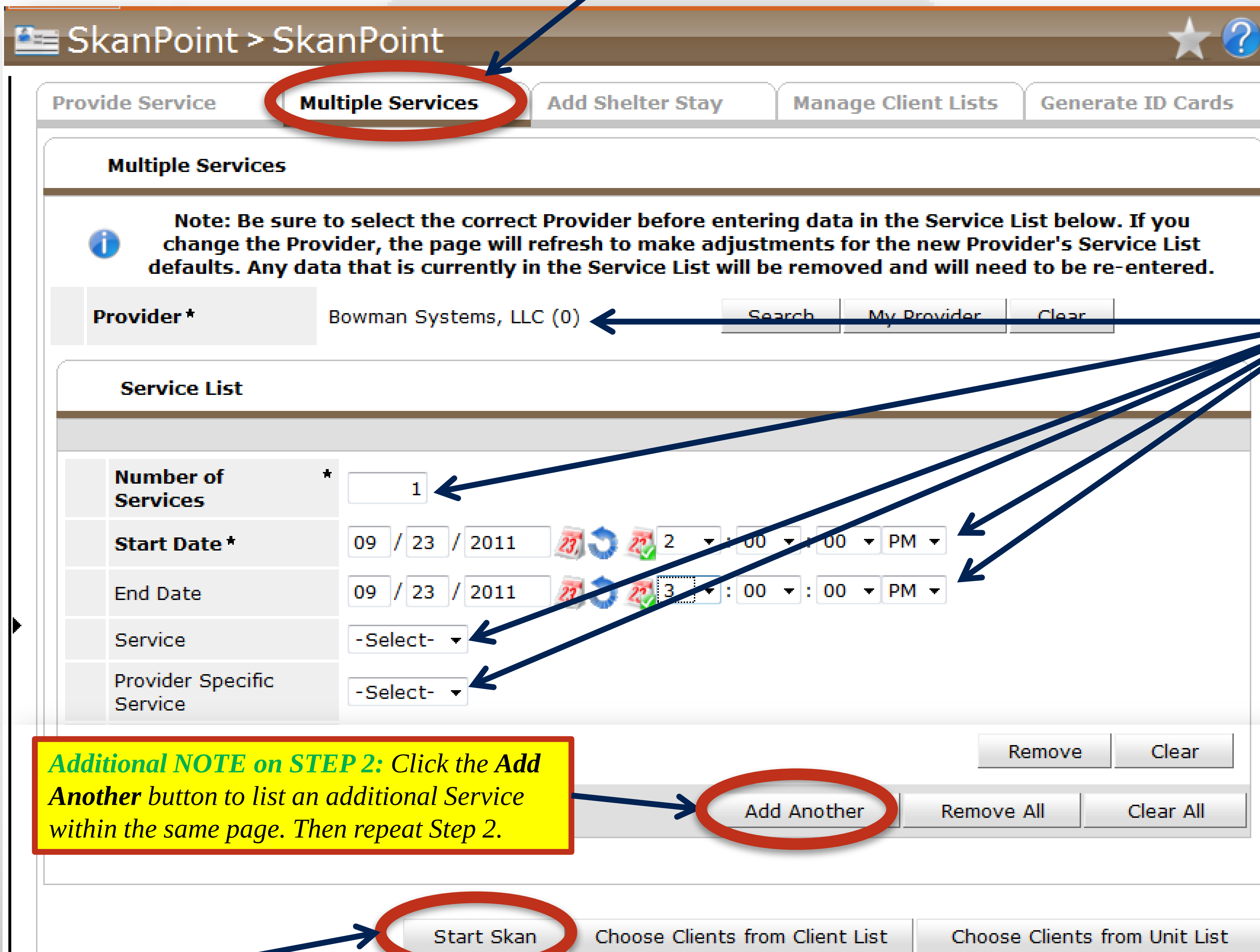
Collaborate. Coordinate. Evaluate.

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

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



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

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.*

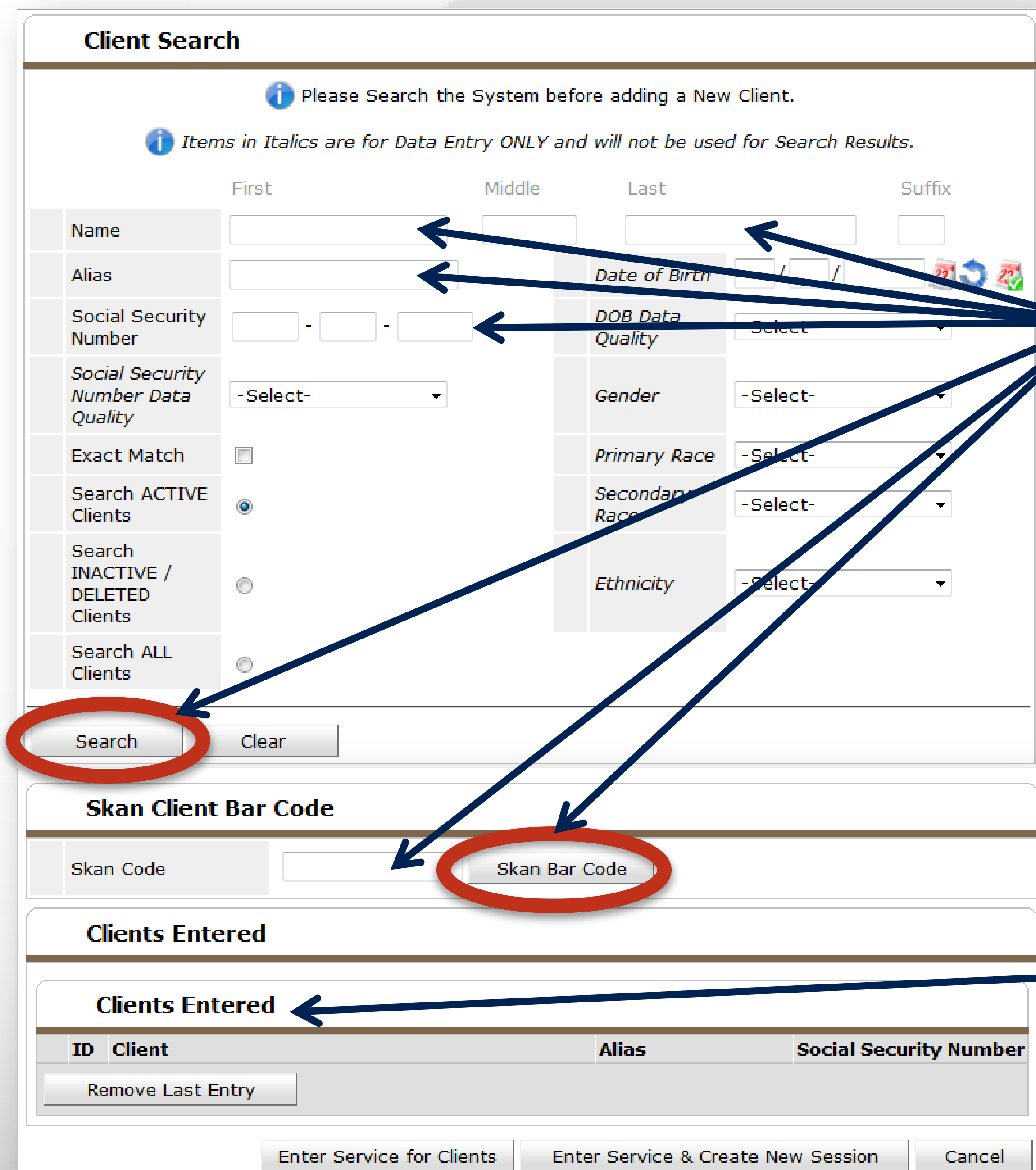
STEP 3: To work from a new (possibly one-time-use) Client List, click the **Start Skan** button.

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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 ~

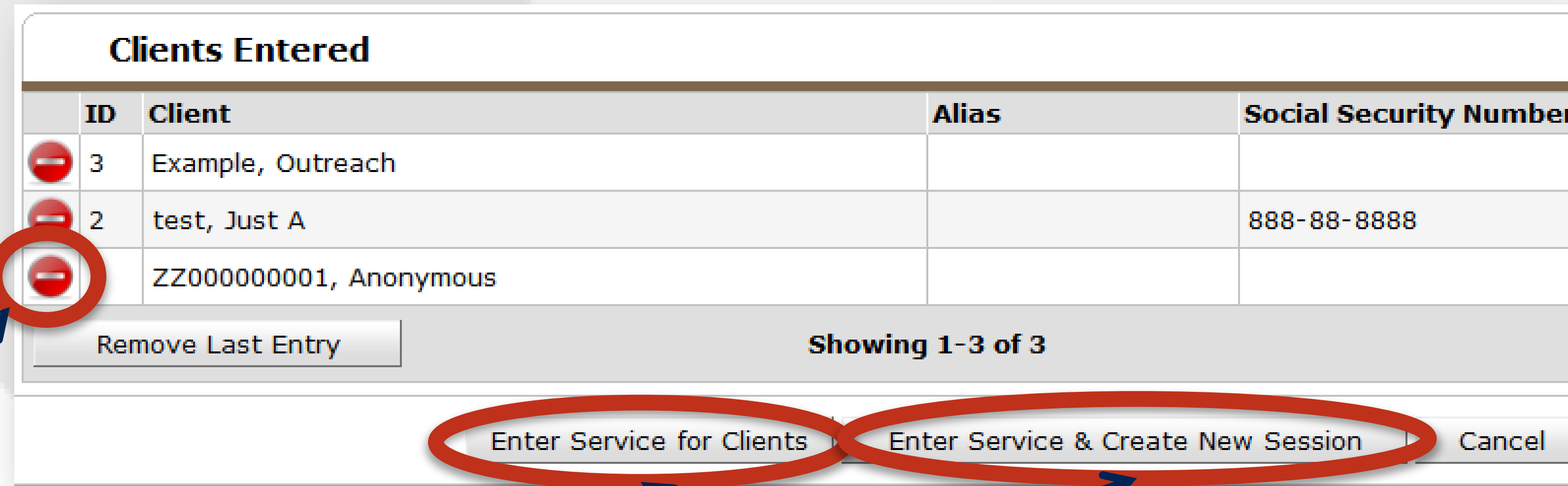
Locate the Client(s) you wish to give a Service Record by typing each respective Client’s ID Number into the **Skan Code** field, and then click the **Skan Bar Code** button. *Using a barcode scanner will automatically complete this function.*

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

Collaborate. Coordinate. Evaluate.

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.*

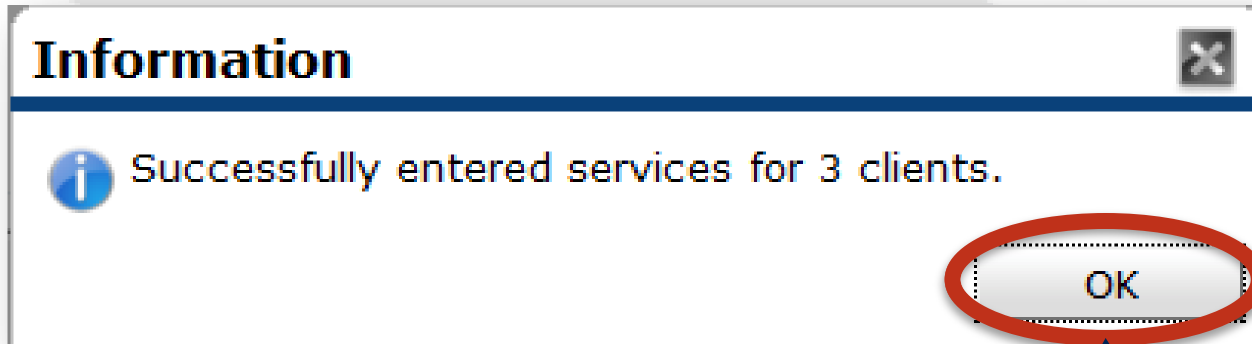


STEP 5: After all necessary Clients have been added to the list, click the **Enter Service for Clients** or the **Enter Service & Create New Session** button.

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.)*

Collaborate. Coordinate. Evaluate.

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.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint Workflow #5b

Creating Bulk Multiple-Service Transactions

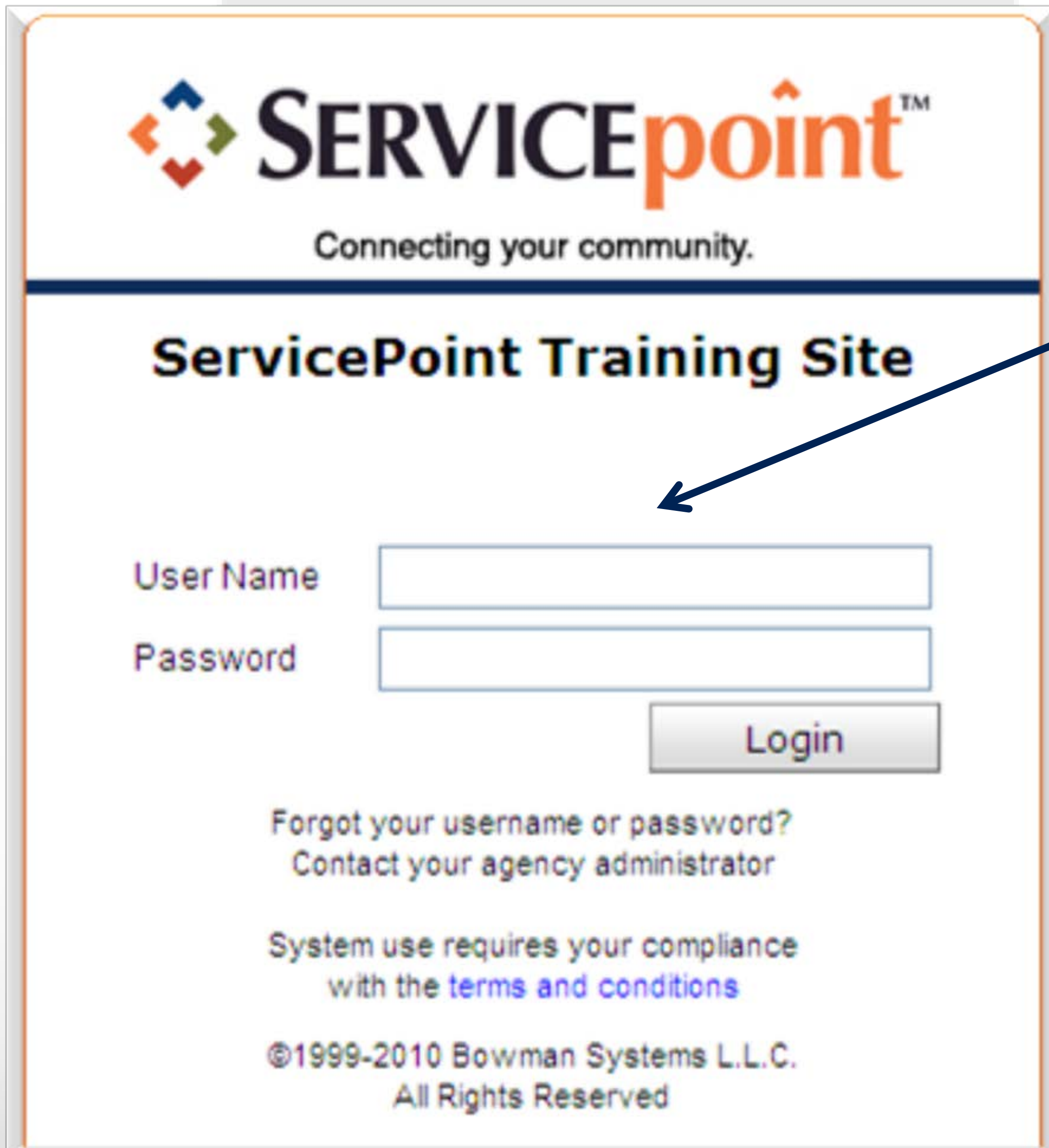
1. Login to ServicePoint
2. Open the SkanPoint Module
3. Click on the Multiple Services tab
4. Input Service-related Transaction Information
5. Select an Existing Client List
6. Review Client List & Record Services
7. Confirm Service Records were Made

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

Collaborate. Coordinate. Evaluate.

SkanPoint v5.5.1



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

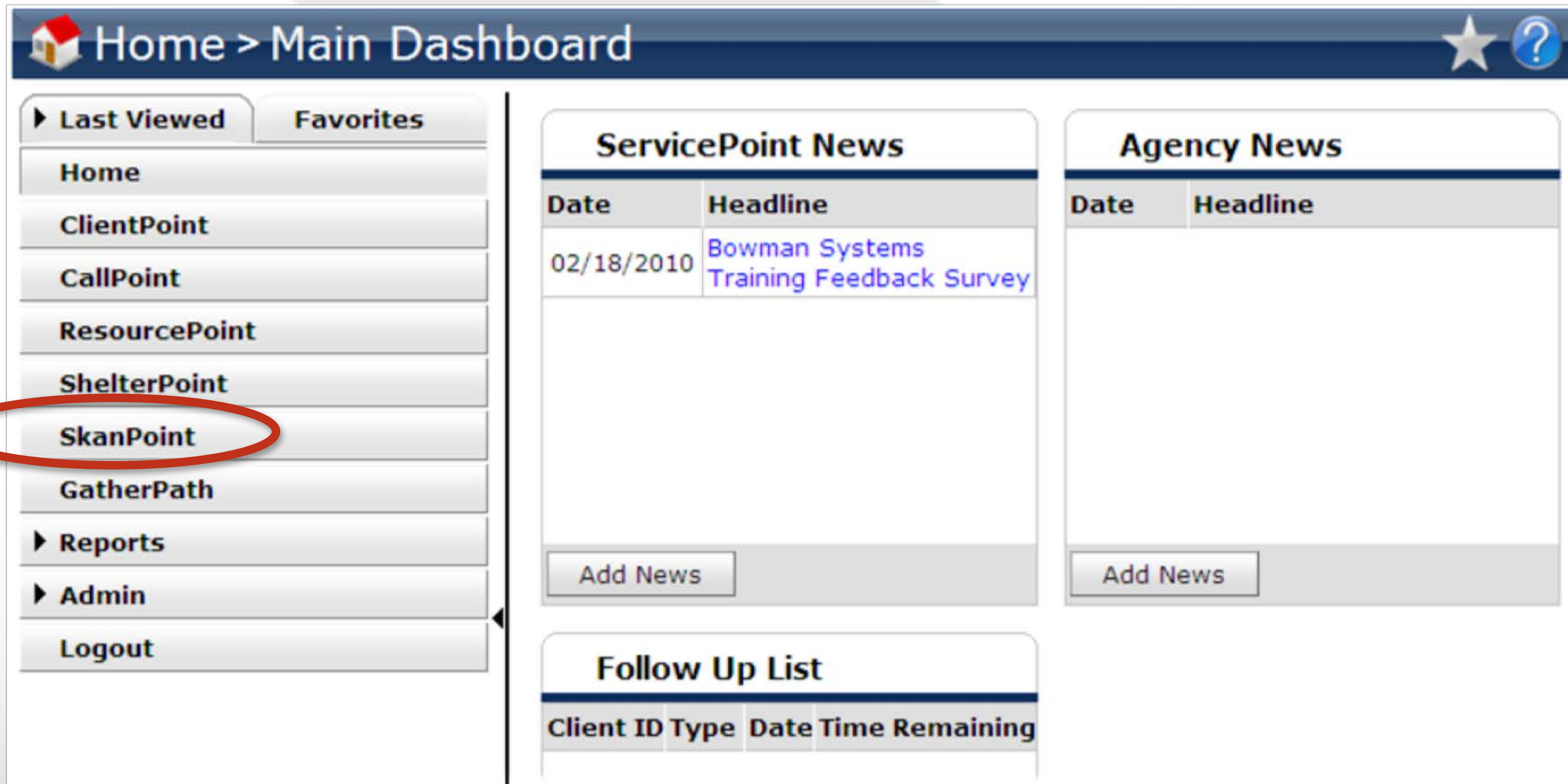
Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint*®.

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



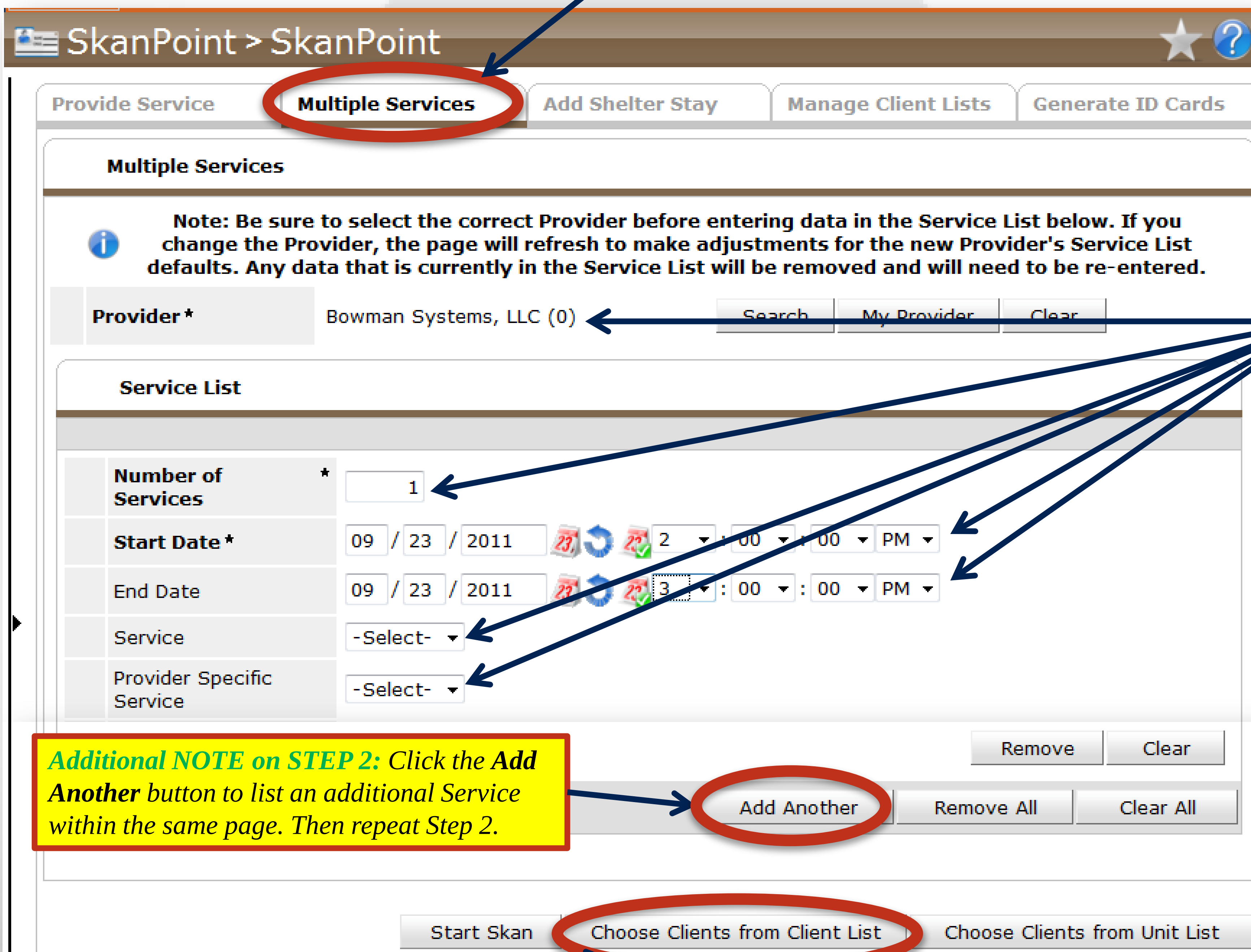
Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

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

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

*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.

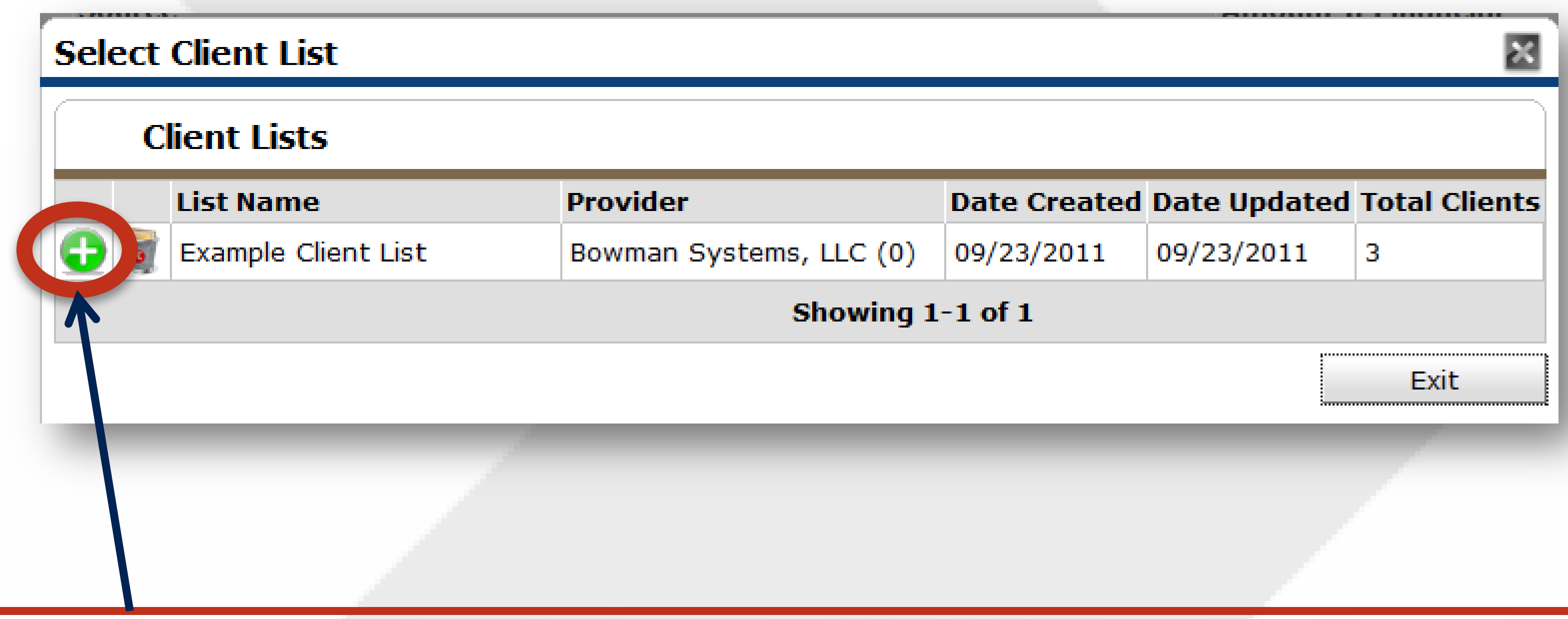
Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

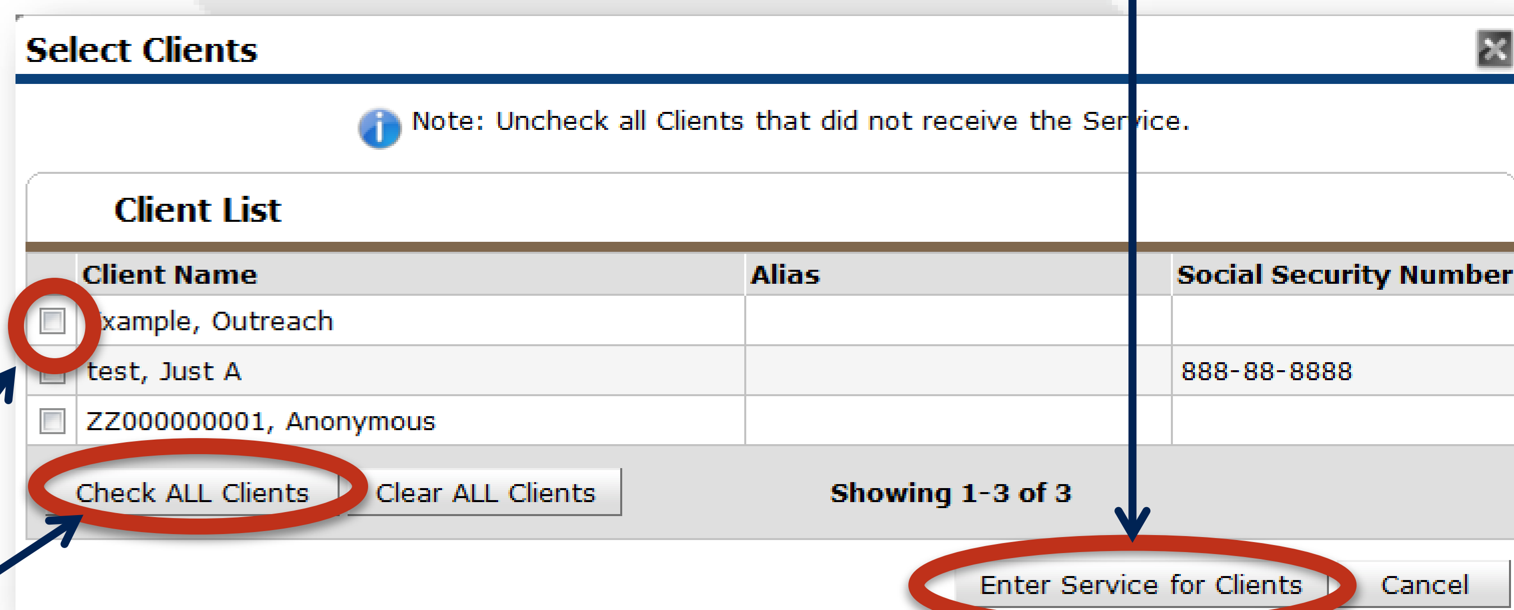


STEP 4: A pop-up window will appear, displaying the existing Client Lists that can be used. When a suitable list is found, click the **Green Plus** icon next to the desired Client List's name to select it.

Collaborate. Coordinate. Evaluate.

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

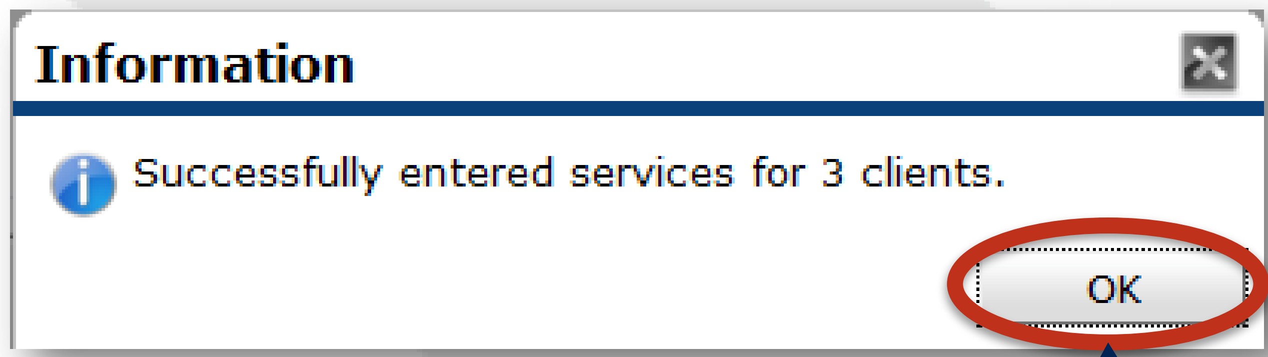
STEP 6: After all necessary Clients have been selected, click the **Enter Service for Clients** button.



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).*

Collaborate. Coordinate. Evaluate.

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.

Collaborate. Coordinate. Evaluate.

SkanPoint Workflow #5c

Creating Bulk Multiple-Service Transactions

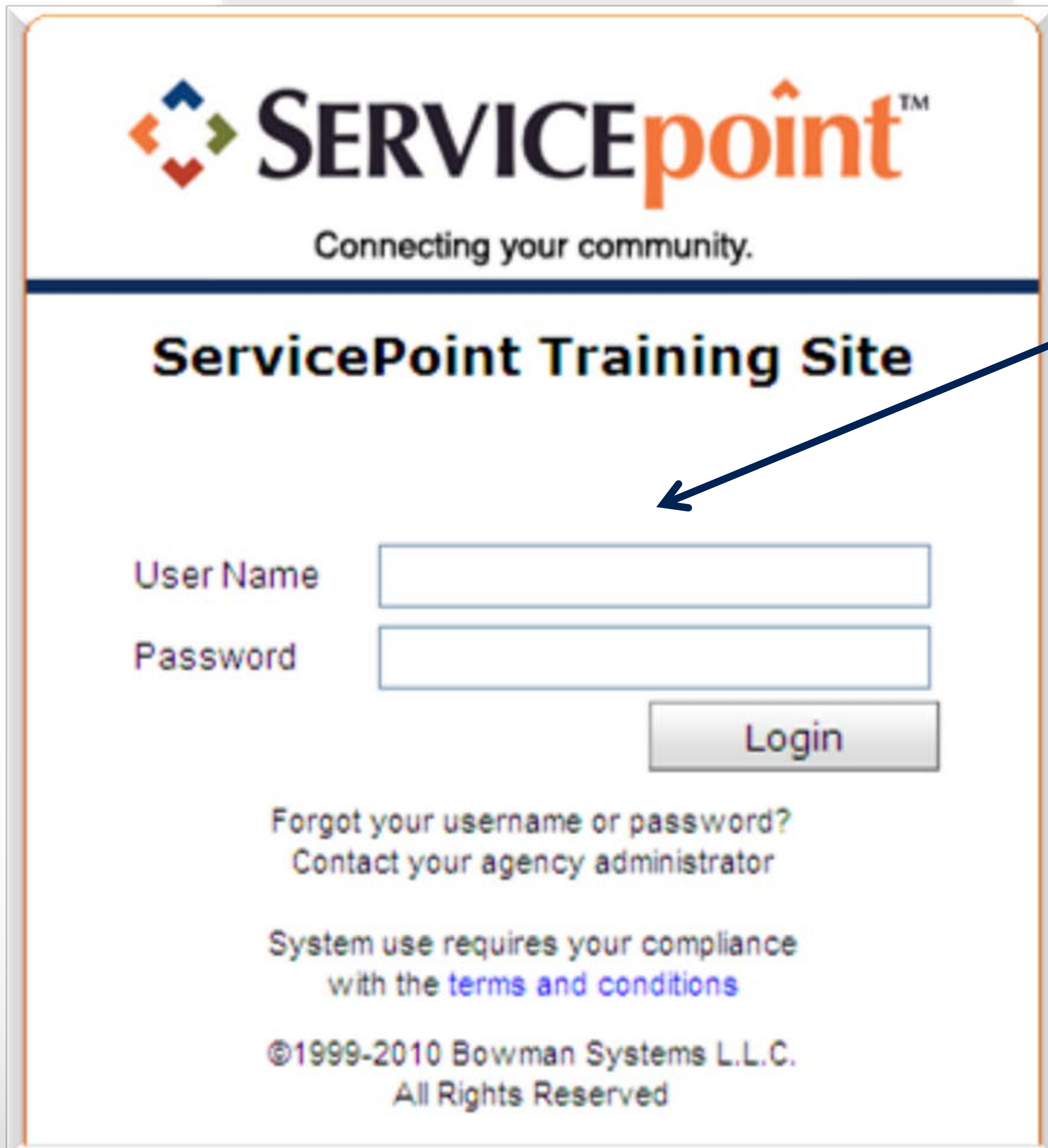
Login to ServicePoint → Open the SkanPoint Module → Click on the Multiple Services tab → Input Service-related Transaction Information → Select an Existing Unit List → Select Clients & Record Services → Confirm Service Records were Made

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



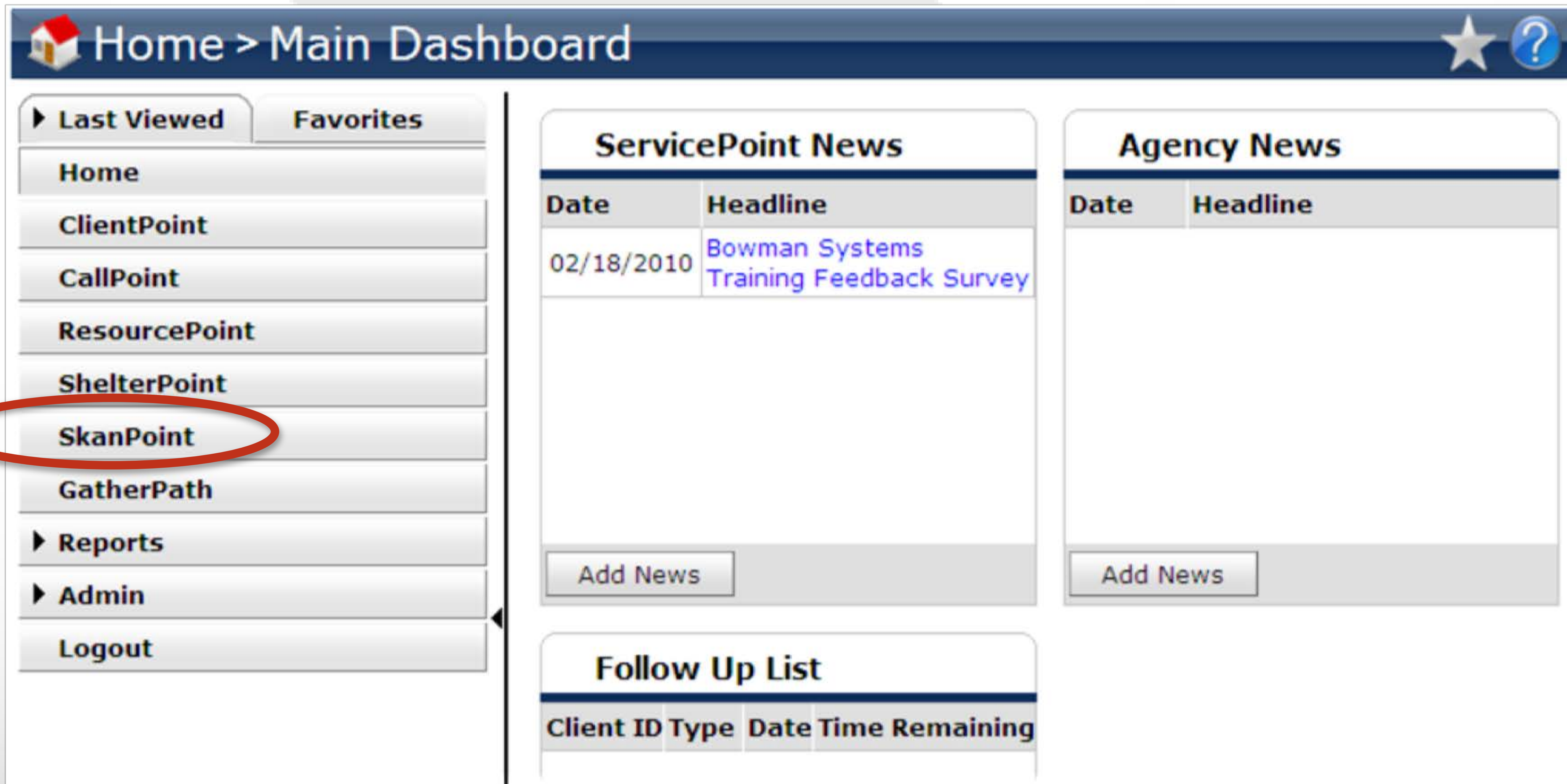
Begin by logging into *ServicePoint®* using your assigned Username & Password.

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

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

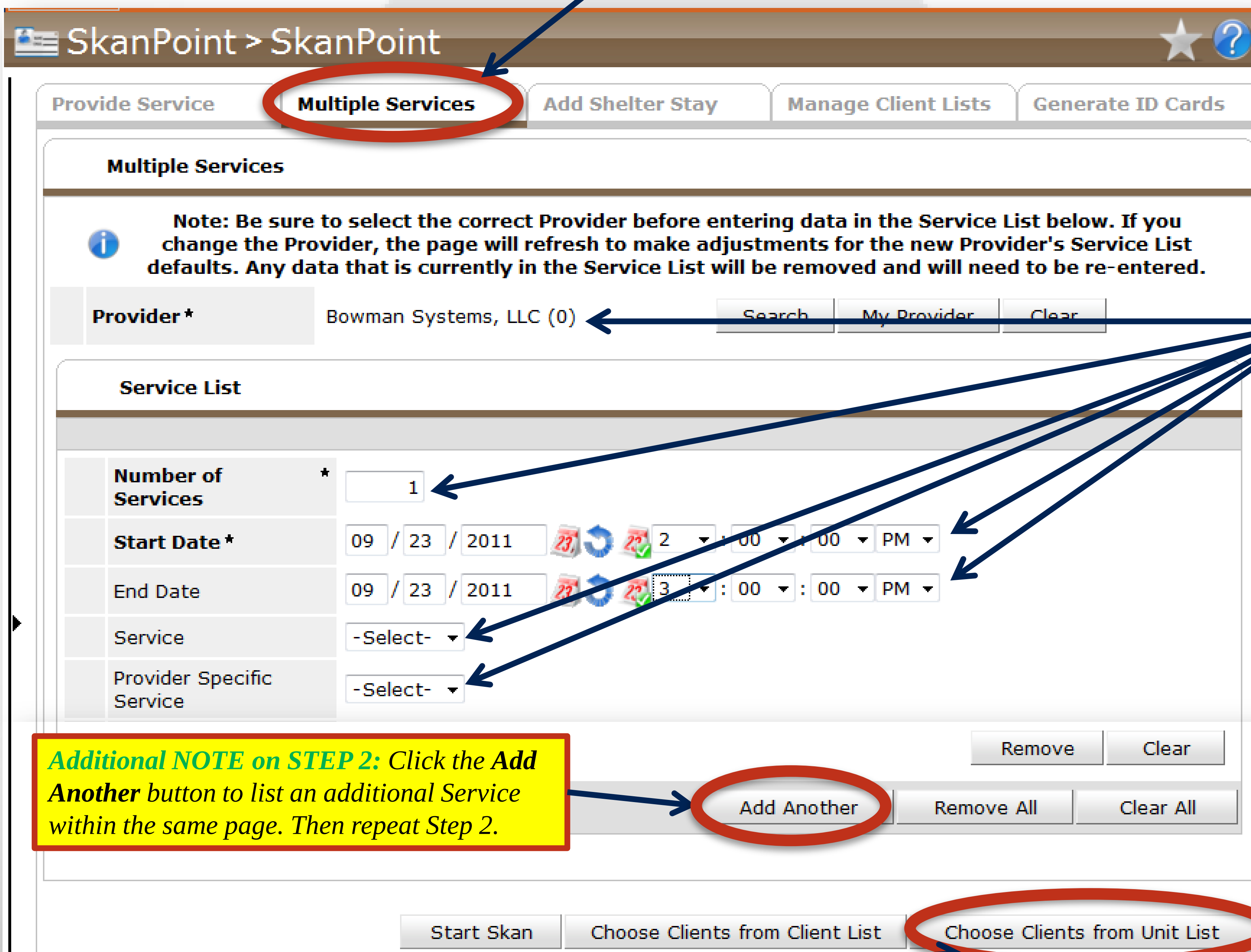
Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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

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

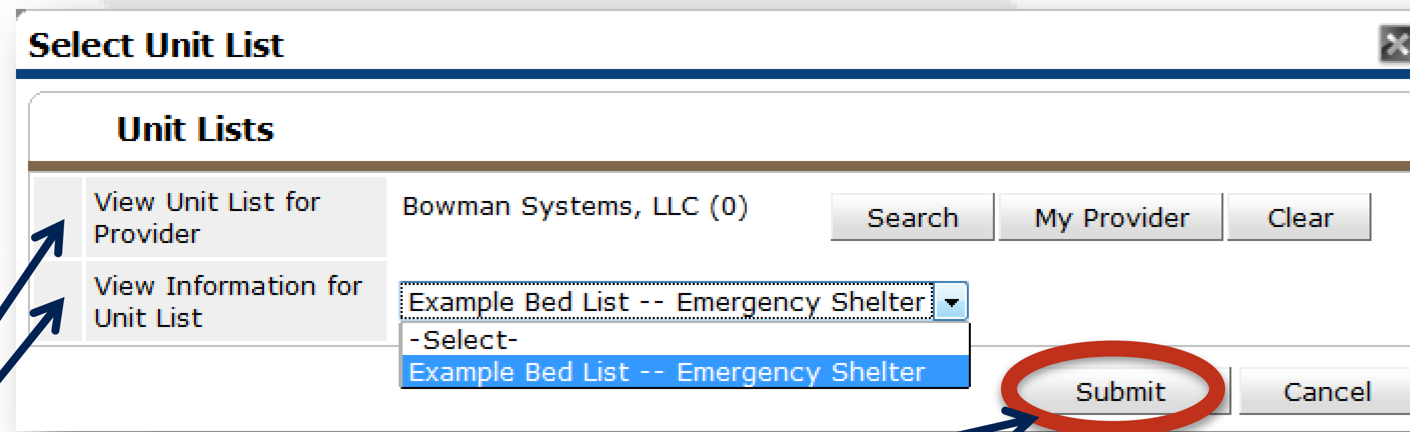
NOTE on STEP 2: *The service-related fields may differ, based on your Provider's settings & service configurations.*

*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.

Collaborate. Coordinate. Evaluate.

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

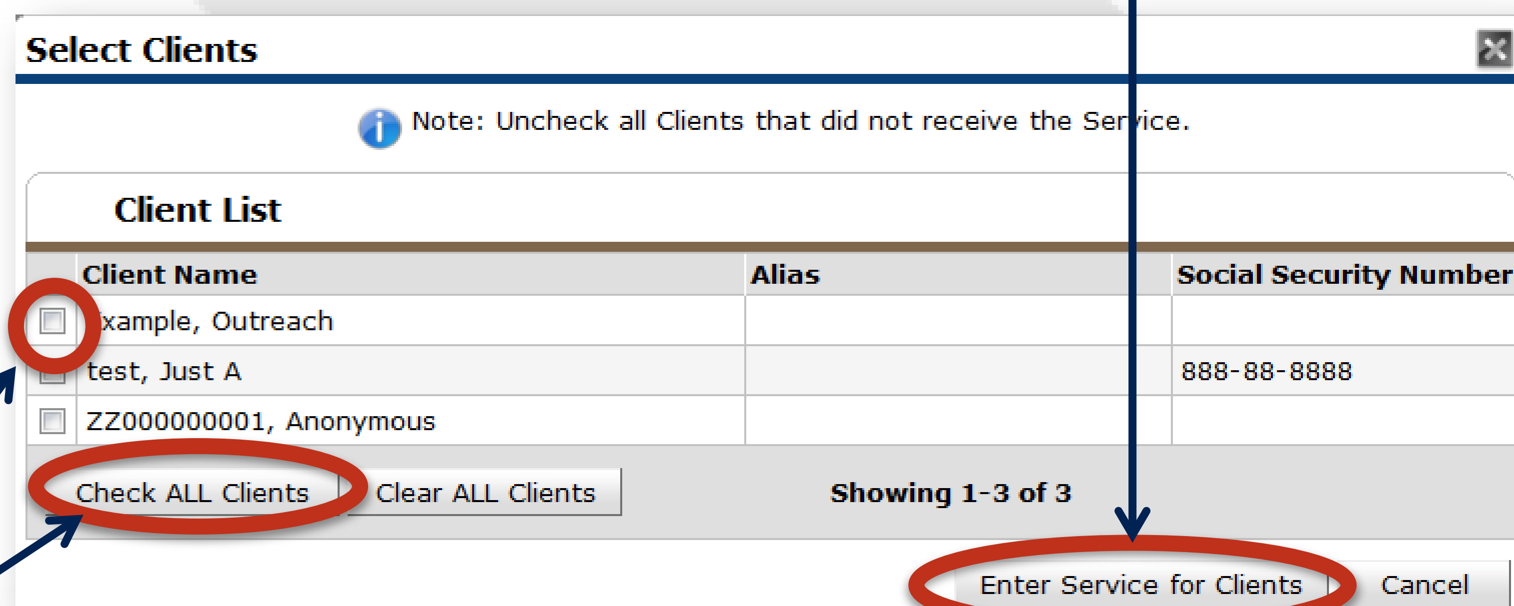


STEP 4: Select a **Unit List Provider**, then select a **Unit List** for the Provider, then click the **Submit** button.

Collaborate. Coordinate. Evaluate.

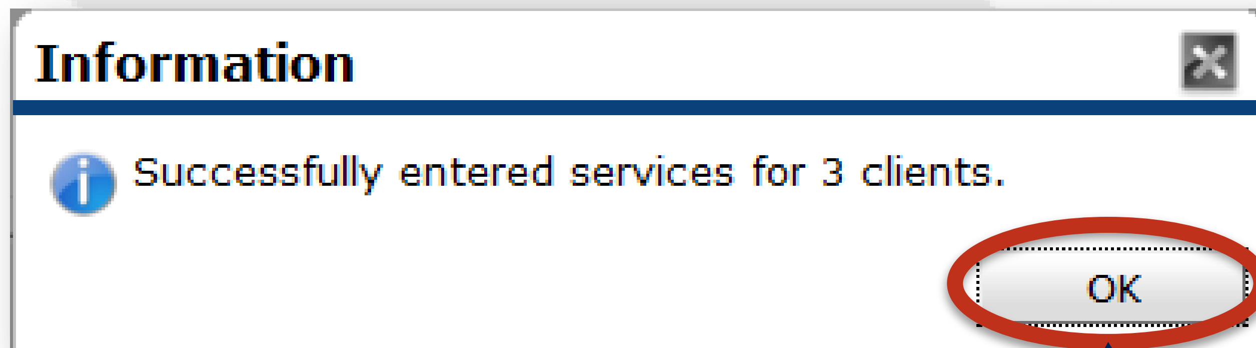
Workflow #5c: Creating Bulk Multiple-Service Transactions (via the "Choose Clients from Unit List" button)

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



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.

Collaborate. Coordinate. Evaluate.

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint Workflow #6

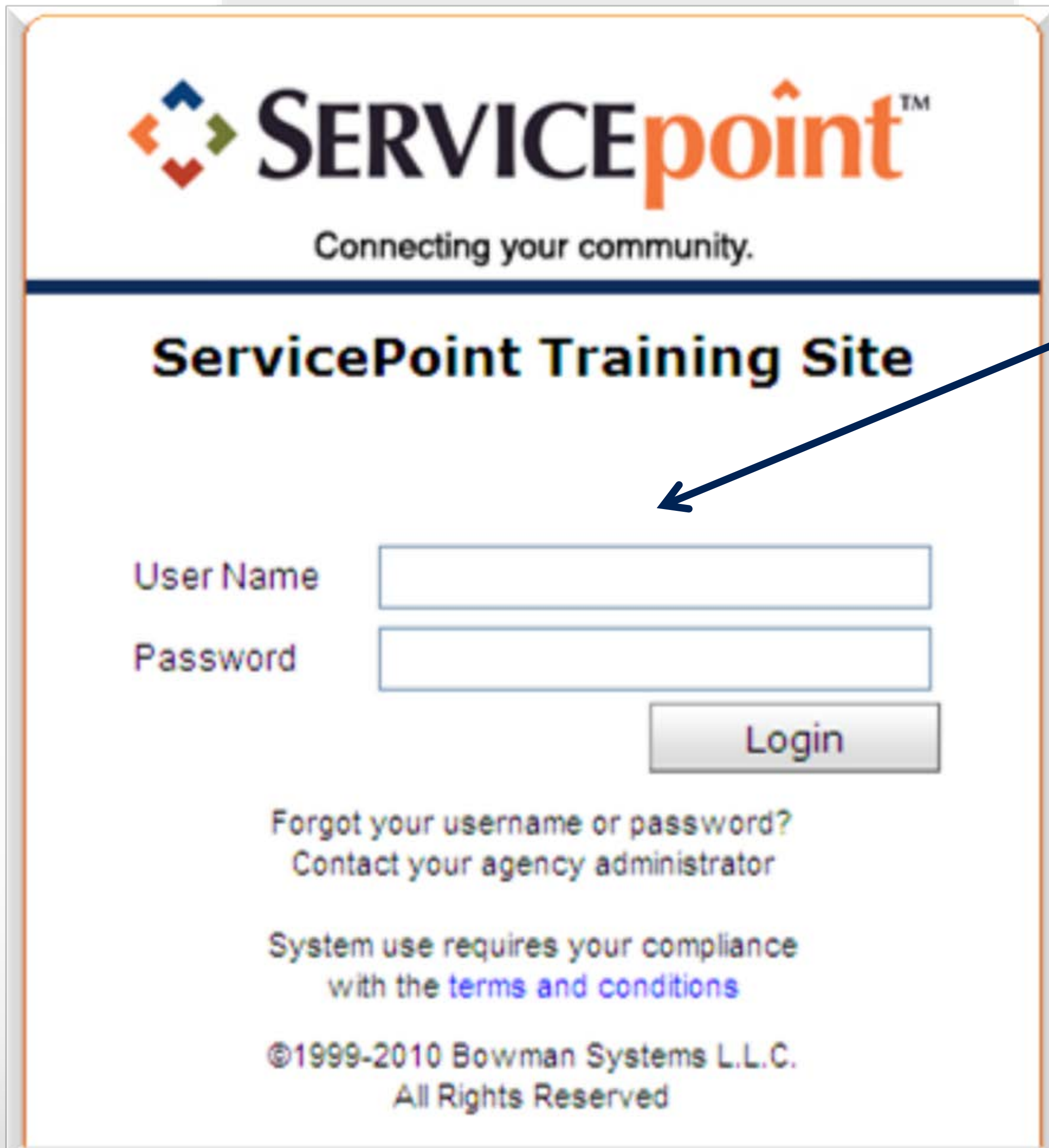
Creating Bulk Shelter Stays

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1

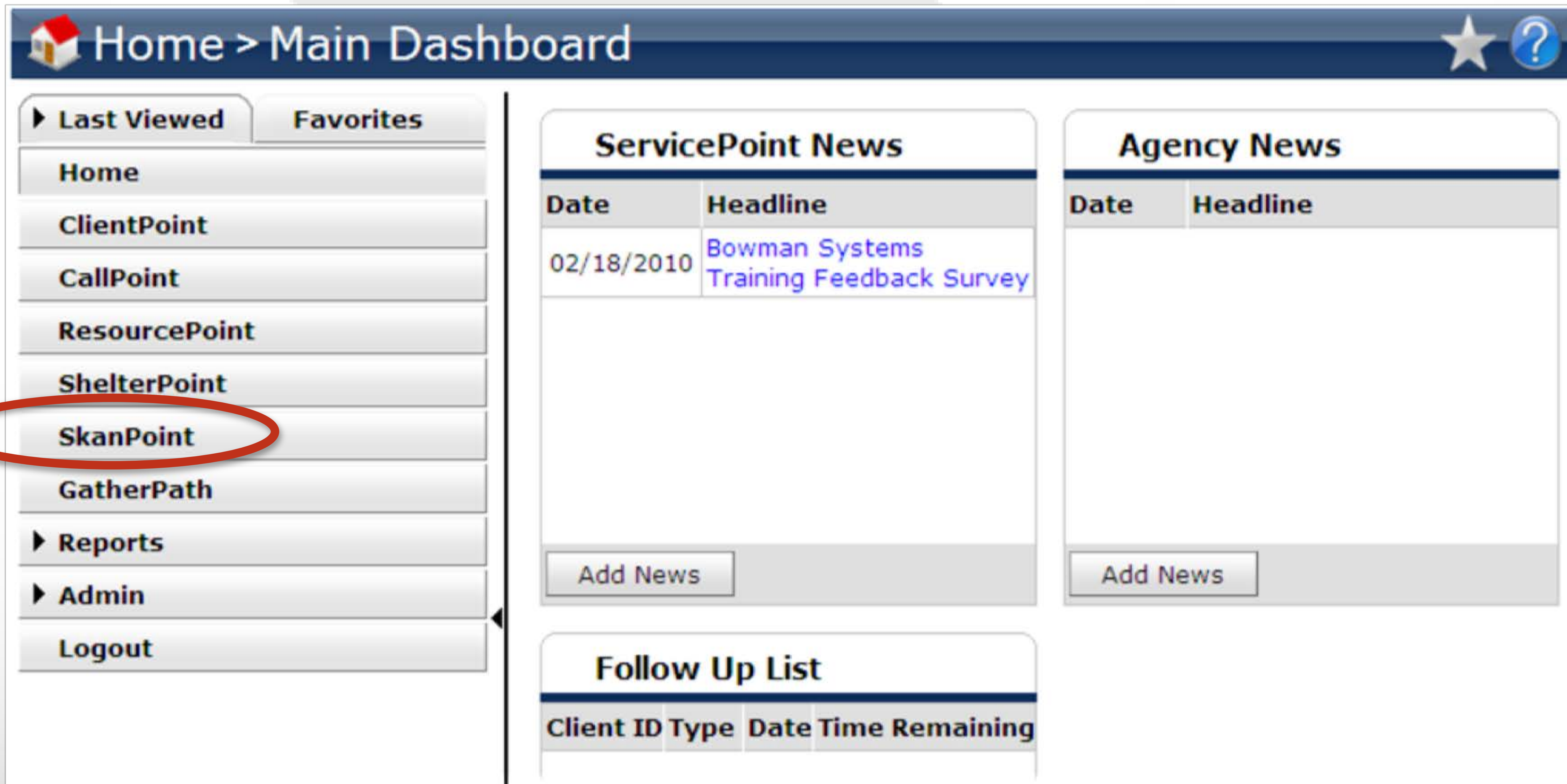


Begin by logging into *ServicePoint*® using your assigned Username & Password.

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

BOWMAN systems
2-1-1 / I&R Housing Youth & Family Services Older Adult Services

SkanPoint v5.5.1



Collaborate. Coordinate. Evaluate.

Collaborate. Coordinate. Evaluate.

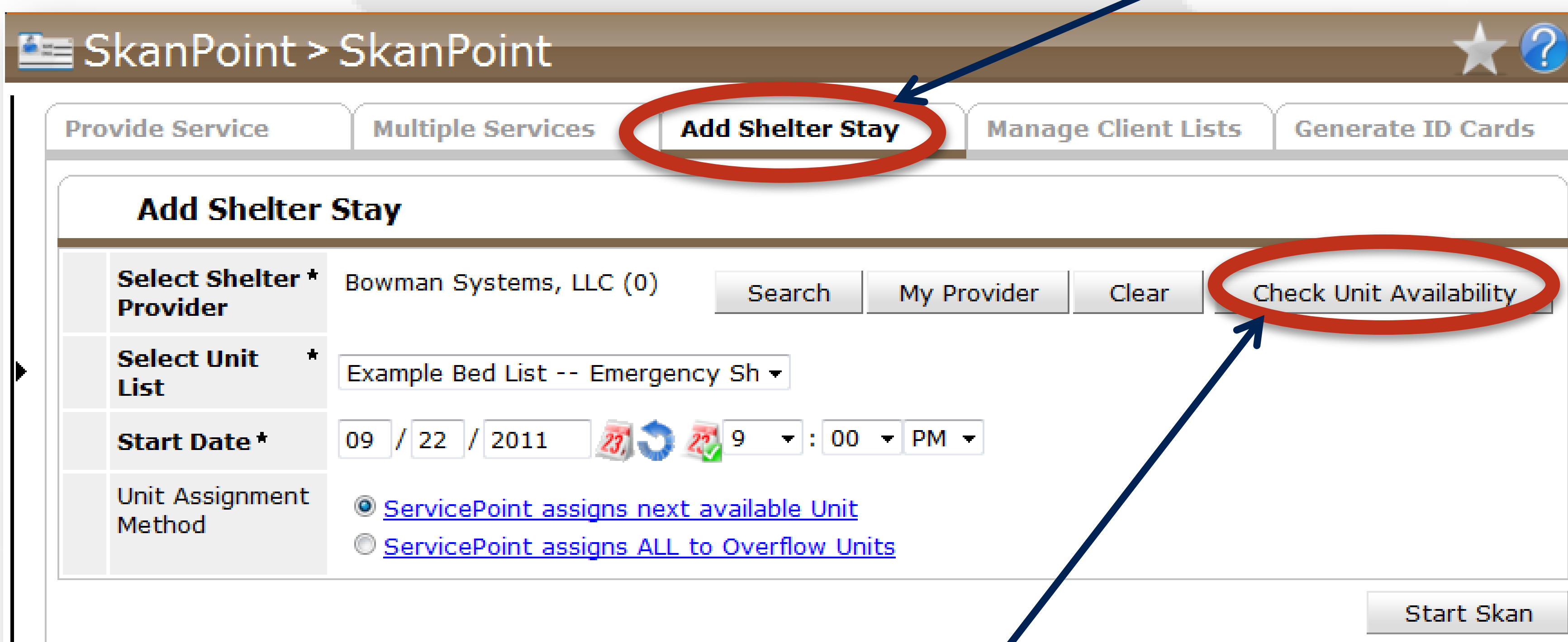
Workflow #6:

Creating Bulk Shelter Stays

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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



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

Collaborate. Coordinate. Evaluate.

BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

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.*

Unit Availability

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

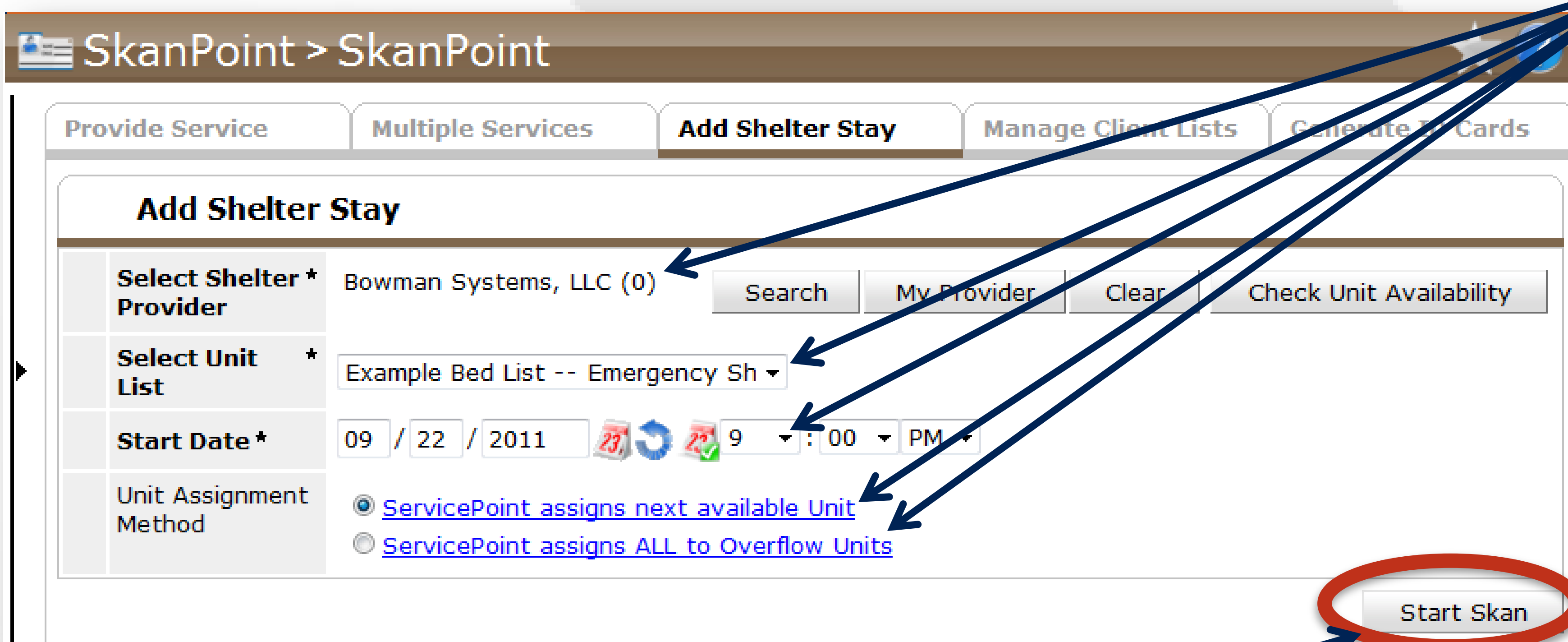
STEP 3: Single-left-click the **Exit** button to leave this screen.

Collaborate. Coordinate. Evaluate.

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.

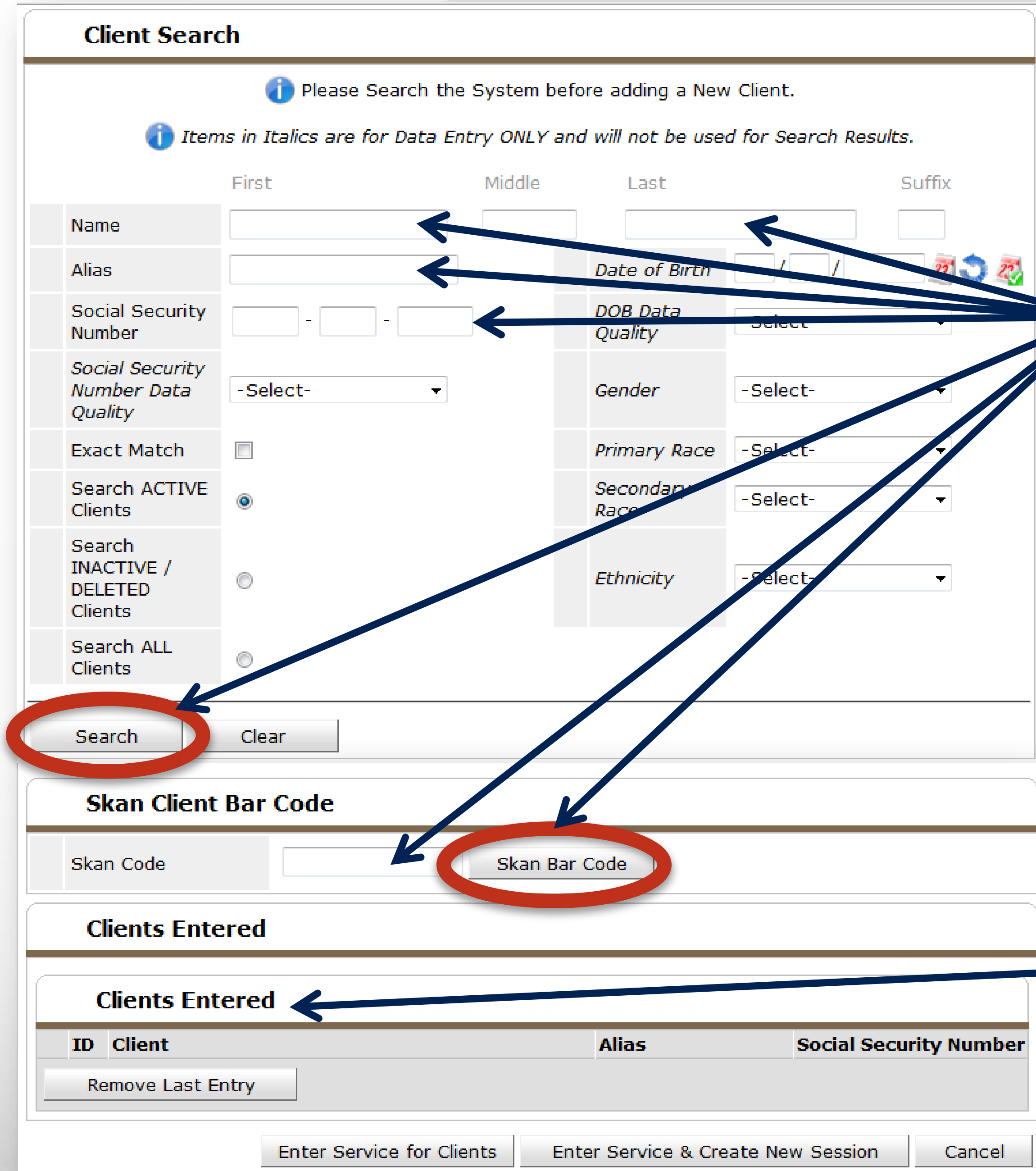


STEP 5: Single-left-click the **Start Skan** button.

Collaborate. Coordinate. Evaluate.

Workflow #6:

Creating Bulk Shelter Stays



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 **Skan Code** field, and then click the **Skan 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.*

Collaborate. Coordinate. Evaluate.

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
		ZZ000000001, Anonymous		

Remove Last Entry — **Showing 1-3 of 3**

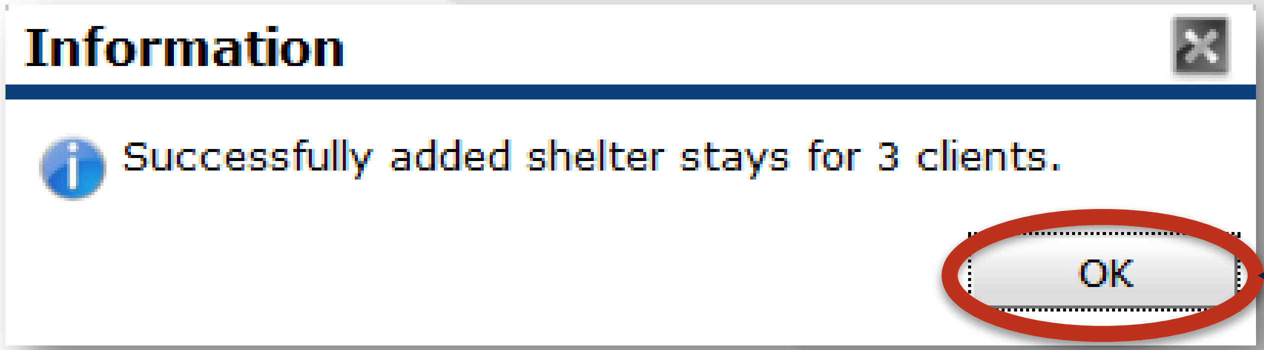
Enter Service for Clients | Enter Service & Create New Session | Cancel

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.

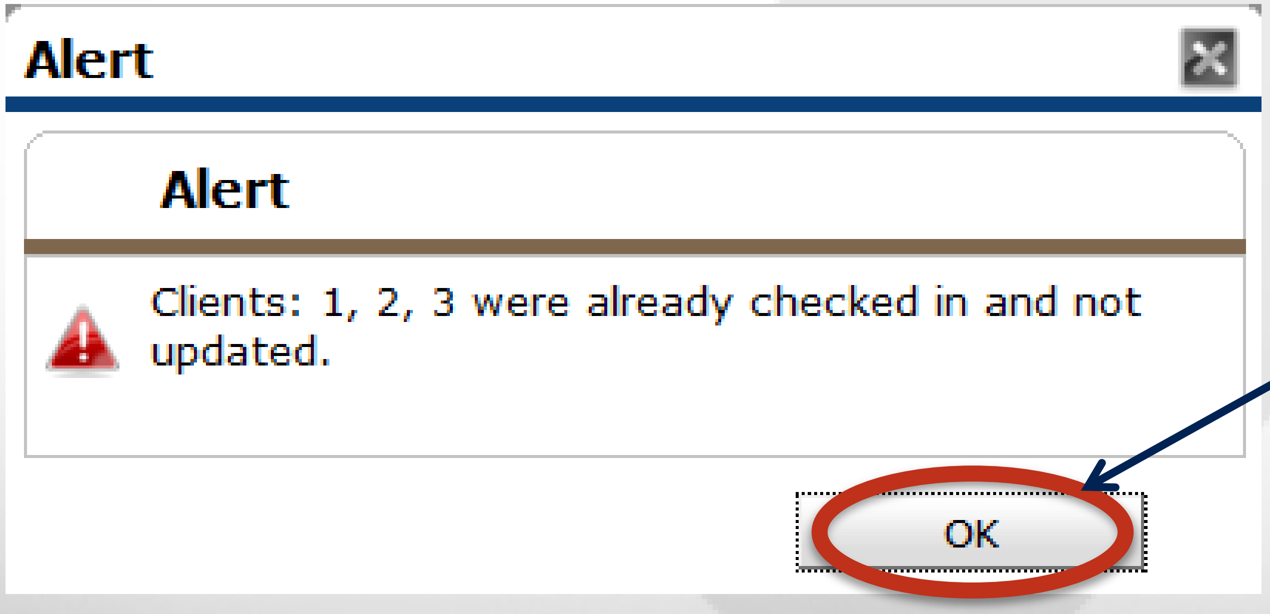
NOTE on STEP 7: *Use the **Enter Service for Clients** button if you intend to input additional similar Unit Assignments for a different group of Clients. (Your existing Provider Unit Assignment data will be retained.) Otherwise, use the **Enter Service & Create New Session** button if you intend to 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.)*

Workflow #6:

Creating Bulk Shelter Stays



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.*