Quick Steps for Required Data Entry

Add/Find Client

1. Add Client (ClientPoint tab): Last name, First name, and Social Security Number or if an existing client pick from search list or enter Client ID # in the "Scan or Enter Client ID" field.

2. Enter/Update essential data elements required by grant (red font). **Important:** Use Backdate mode if data entry is not on the same day as the intake. For SHP grantees this includes the additional Disability by Type and Monthly Income by Source sub-assessments.

3. Add/Update Household information if applicable.

4. Record ROI (from signed Client Consent Form). For client and all household members.

5. Record Entry/Exit into the program for the client and all household members.
   a. **Change provider to HUD funded program – HUD-ESG-$E/E (Provider Name) or HUD-SHP-$E/E (Provider Name)**
   b. Type = HUD-40118
   c. Enter date entered into your program
   d. If an client has an existing Entry date but no **exit** date in a program **other than your own** please contact me
   e. Verify all red font questions are answered. These are the required data elements for your grant

6. Record Needs and Services (In ClientPoint tab under Service Transactions).
   a. Identify the Need (example Case/Care Management) and "Overall Need Status". Click on Save Changes
   b. Click on Add Services button– **Change provider to HUD funded program – HUD-ESG-$E/E (Provider Name) or HUD-SHP-$E/E (Provider Name)** to record the service provided under the correct HUD funded program
   c. Enter the date range (example 10/01/2006 to 10/31/2006) and any notes (ex: hours of Case Management)
   d. Add any referrals to Mainstream providers for that Need

7. Enter into ShelterPoint.
   a. Access ShelterPoint and pick the correct shelter from the dropdown list
   b. Click on any Empty link in the applicable Bedlist and add the client
   c. Enter the Date In

Record On-Going Services - entry of all HUD funded services required

1. Record on-going Needs/Services (In ClientPoint tab under Service Transactions) for HUD funded services.
   a. Access client record and click on Service Transactions
   b. Click on View Past Needs/Services
   c. Click on the pencil to the left of the identified Need for the service
   d. Click on the Add Services button
   d. **Change provider to HUD funded program – HUD-ESG-$E/E (Provider Name) or HUD-SHP-$E/E (Provider Name)**
   e. Enter the date range of the service and any notes

Exiting Client

1. Exit client from ShelterPoint
   a. Access your Shelter in ShelterPoint
   b. Click on Client name
   c. Enter the Date Out
2. Find Client in ClientPoint tab and click on Entry/Exit icon
   a. Record Exit Date from program (for individual and household members)
   b. Record Reason for Leaving
   c. Record Destination
   d. **SHP Grantees Only** - Update Monthly Income and Disability Types at Exit