

ServicePoint - Home - Microsoft Internet Explorer

Address: https://www3.servicept.com/idaho/scripts/svpmain.php?1091631036

Idaho Housing and Finance Association (IHFA) Aug 04, 2004

Idaho Housing and Finance Association / Boise

Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Admin Help Logoff

Navigate

- [ClientPoint](#) - Add, edit or view client profile, client assessments, or add, edit, or view service transactions
- [ResourcePoint](#) - Find community resources
- [ShelterPoint](#) - Check housing availability in your community.
- [Reports](#) - View standard reports, or generate custom reports.
- [Newsflash](#) - View or post newsflashes for your agency
- [Help](#) - Visit the help area for assistance in using the system.
- [Administration](#) - Maintain ServicePoint™ (administrator a

NewsFlash - System

System Administrator Contact info - wehdys@ihfa.org or call 208-424-7015, toll free: 1-877-447-2687

As a matter of policy - IHFA does not endorse any service or agency. Information is provided solely to assist you in exercising your own best judgment. Information is believed reliable but not guaranteed as to accuracy. Agency/Program information is subject to change at any time.

Followup List

| Type | Date | Time Remaining |
|------|------|----------------|
|------|------|----------------|

ServicePoint version 3.02.000 (db build #0423)
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Log Into ServicePoint
In the Navigate section
or the green tabs
select:
Reports

ServicePoint - Reports - Microsoft Internet Explorer

Address: https://www3.servicept.com/idaho/scripts/svpreports.php?1091631030

Client/Service Access Information - Audit the access to client/service information.

PROVIDER REPORTS

- [Client Served](#) - Get an unduplicated count and breakdown of clients your provider has served within a certain time period.
- [Daily Bed Report](#) - This report allows you to generate a daily bed list report of which clients stayed in what bed on a specific night.
- [HUD-40118 APR \(New 2004 version\)](#) - This report generates the HUD APR for the provider and date range you have selected. The data for this report comes from HUD-40118 Entry/Exits and HUD-40118 Assessments.
- [HUD-40118 APR \(Old version\)](#) - Previous version of the HUD-40118 report. Depending on your provider's operating year you may need to use this version one last time before using the new one.
- [Outstanding Referrals](#) - Find outstanding (unresolved) referrals that have either been made by your provider or sent to your provider.
- [Service Transaction](#) - A listing of clients with identified needs, referrals made and services delivered.
- [Needs Report](#) - A listing of clients along with identified needs.

CUSTOM REPORTS

- [ReportWriter](#) - Build and save your own reports. Select the tables, database with. Save queries for future ServicePoint use, or download

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Select:
Report Writer

CPT only ©2002 American Medical Association. All Rights Reserved.
DSM-IV-TR ©1994 American Psychiatric Association. All Rights Reserved.
ICD-9-CM ©1994 National Center for Health Statistics (ICD-9 ©World Health Organization). All Rights Reserved.
Taxonomy ©1983-1991 Information and Referral Federation of Los Angeles County, Inc. All Rights Reserved.

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Preview Tables Fields Filters Counting Options Start Over Exit

Select the tables to use for this report:

ServicePoint Tables

- Action Steps
- Client Infractions
- Entry Exit
- Households
- Providers
- Providers Counties Served
- Release of Info
- Services

Assessments

- Additional Profile Information
- Children
- Education
- Global
- HUD-40118
- MainstreamResourcesCert
- Mental Health
- Residential
- SVDP_VA_PD
- Emergency Shelter Grant (ESG)
- HIRC
- Insurance Information
- Medical
- Military
- ShelterPlusCare0.0
- VCC_Protection_Order
- Employment
- History
- Legal
- Medication
- Personal Strengths
- Substance Abuse
- VCC_Safety_Planning

Sub Assessments

- Addiction Information
- Axis III: General Medical Condition
- CivilProtOrder
- Arrest Record
- Axis IV: Psychosocial Problems
- Client's Residence
- Axis II Diagnosis: M.R. & Personality Disorders
- Axis V: GAF Score
- Dental Problems

You will receive a 'pop-up' window.
Make it a full size screen.
Click on the Options tab.

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Preview Tables Fields Filters Counting Options Start Over Exit

Indicate the column you would like to order by for this report: Error: There are no fields selected.

Indicate the column order and column names for this report: Error: There are no fields selected.

Select a previously saved report:

| Name | Date | Provider | Description |
|----------------------------------|------------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2003 Children Served | 05/14/2004 | Idaho Housing | Summary of children served in 2003 |
| 2003 Housing | | | 3, agency |
| 2003 Maintre | | | referral and select # of |
| 2003 Needs: | | | identified on |
| 2003 Outstan | | | |
| 2003 UnMet Needs | 01/21/2004 | Idaho Housing and Finance Association | Unmet needs added during 2003; all needs, all providers |
| 2003bednight atvp | 05/10/2004 | Idaho Housing and Finance Association | to clean up bednights |
| 2004 Children Served | 05/14/2004 | Idaho Housing and Finance Association | Summary of children served in 2004 |
| 2004 Maintream Service Referrals | 07/13/2004 | Idaho Housing and Finance Association | This indicates the referrals made to the 'recognized' mainstream referral agencies. For needs identified calendar year 2004. Go to Counting and select your agency under Provider or ProviderCreating. This will indicate # of referrals, to which agencies or programs and # of unique clients... |
| 2004 Outstanding Referrals | 01/21/2004 | Idaho Housing and Finance | Audit of Outstanding Referrals, for needs identified in 2004 |

Look through the available names to locate the report desired. This is a rather lengthy screen and has many specialized reports. They are sorted alpha-numerically.
To select the report click on the report name:
Draw Verification - Supportive Services.

The screenshot shows the ServicePoint Report Writer interface. At the top, there is a list of reports with columns for Name, Date, Provider, and Description. A confirmation dialog box is overlaid on the list, stating: "The confirmation pop-up will appear. Select OK. If you are in the process of writing or customizing a report – this will over-write any unsaved changes." Below the dialog, a "Microsoft Internet Explorer" window shows a warning: "By loading a Quick Query you will over-write any unsaved changes. Are you sure you want to continue?" with OK and Cancel buttons.

The main interface has a blue header with the ServicePoint logo and the text "Idaho Housing and Finance Association (IHFA) Aug 04, 2004". Below the header is a navigation bar with buttons for Preview, Tables, Fields, Filters, Counting, Options, Start Over, and Exit. The "Fields" section is active, showing a list of columns to be included in the report. A text box explains: "The screen will refresh and a summary of the column order appears." Below this, a list of columns is shown with dropdown menus for ordering. A second text box provides instructions: "Go to Filters to set any required filters. Go to Counting to see a summary of information. Go to Preview to see the details." At the bottom, there is a list of reports similar to the one at the top.

Under Preview you have 3 options
View Full Report, Show Preview (30 lines of information) or Download Report.

Required Filters for Draw Verification – Support Services Report:

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Preview Tables Fields Filters Counting Options Start Over Exit

Current filters - (Click on filter to remove)

1. Clients.Inactive Equals 'No'
2. (Entry Exit.ExitDate Is Null
OR Entry Exit.ExitDate Is On or After '07/01/2004')
3. Entry Exit.Inactive Equals 'No'
4. Needs.DateAdded Is On or After '01/01/2004'
5. Needs.Inactive Equals 'No'
6. Services.ProvideStartDate Is Between and Including '07/01/2004' AND '07/31/2004'
7. Service Codes (Related to Needs).NeedDescription Equals 'case management'

Update Filters

Indicate the criteria for this report:

ServicePoint Tables

Clients
- Select -
Add Filter

Needs
- Select -
Add Filter

Service Codes (Related to Needs)
- Select -
Add Filter

Assessments
Sub Assessments

Entry Exit
- Select -
Add Filter

Services
- Select -
Add Filter

Using the drop down lists select value and click on Add Filter.

Entry Exit - Exit Date is on or after mm/dd/yyyy (first day of period)

Services - Provide Start Date is between and including mm/dd/yyyy mm/dd/yyyy (first and last day of period)

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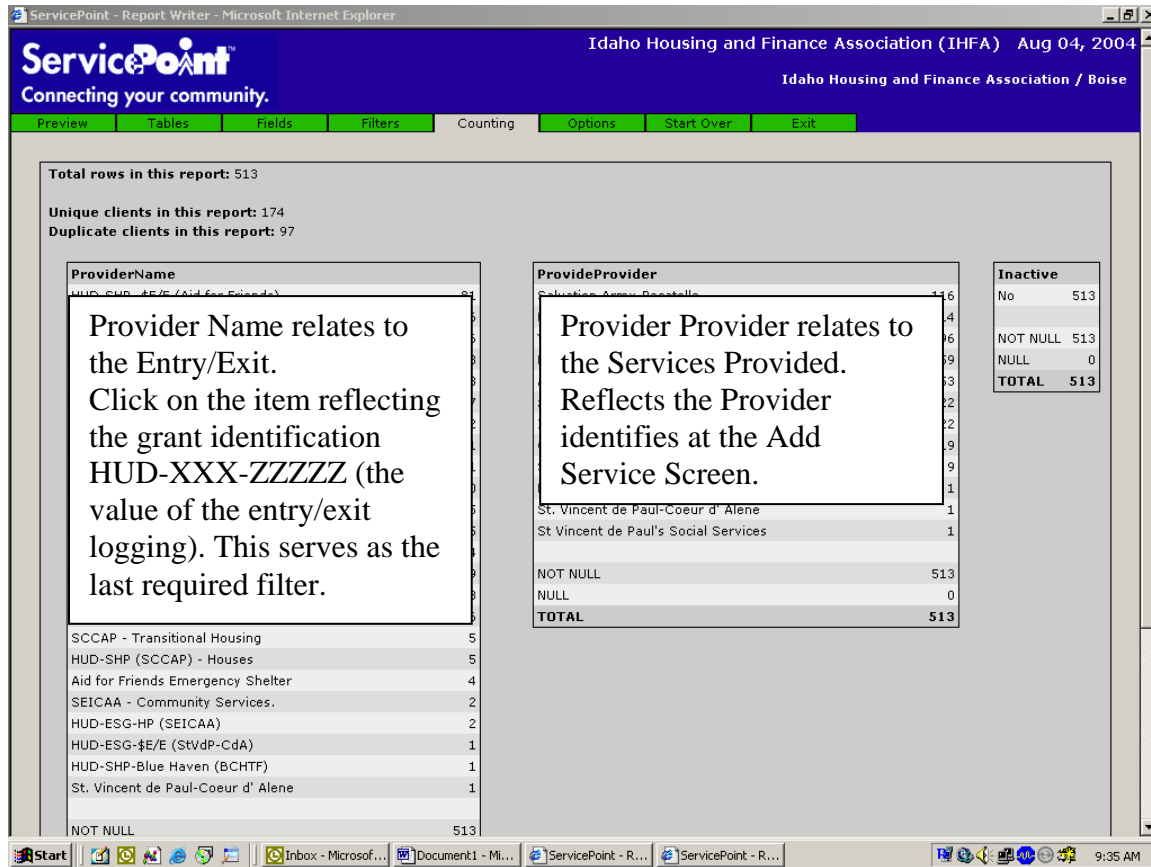
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Preview Tables Fields Filters Counting Options Start Over Exit

Indicate the criteria for this report:

Add a Filter - Entry Exit Table
ExitDate Equals [] [] Add Cancel Filter

After all filters are set
click on the Counting tab



Go to Preview,
 3 options exist: View Full Report, Show Preview (first 30 lines of information) or Download Report.

Print the Full Report or Download to submit in lieu of the Client Billing Sheet for IHFA draws.

! The report MUST be reviewed for “Approved Line Items”. Limitations in reporting may display lines of information not approved in your grant. You are also required to submit a screen print of the Filter page.

To print the screen use <CTRL> and “P”.

NOTE: This report does not display Case Management or Shelter information. Only information input into ServicePoint Service Transactions will be reflected.