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. Use "Household Data Sharing" and the "Additional Adult Family Member" assessment to record family member information.

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-ESG-$E/E (Provider Name) or HUD-SHP-$E/E (Provider Name)**
   b. Type = HUD-40118
   c. Enter date entered into your program
   d. 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. Click on the Multiple Services if not using the Notes field or Referral or use the Add Need/Service button if entering Notes or Referrals. **If you are using the Multiple Services button skip to step D**.
   b. Or Click on Add/Need Services button.
   c. Enter the Need date (same as Service Start Date) and identify the Need Type (example Case/Care Management).
   d. **Change provider to – HUD-ESG-$E/E (Provider Name) or HUD-SHP-$E/E (Provider Name)** to record the service provided under the correct HUD funded program
   e. Enter a Service Start Date **AND** a Service End Date (example 10/01/2006 to 10/31/2006)
   f. Identify the Service Type using the drop down list (or if using the Add Need/Services click on the "Same as Need" link to add the Service Type) and any notes (ex: 10 hours of Case Management)
   g. Add any referrals to Mainstream Providers for that Need
   h. Record the Status of the Need/Service (example: In Progress/Fully Met)

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. See instructions #6 above

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 and HPRP Grantees Only** - Update Monthly Income and Disability Types at Exit