

CallPoint SP5.14

Pre-Requisites

This document is a supplement to the Standard Data Entry Workflow. Users must have working knowledge of the Standard Operating Procedures. Live/same day data entry must be completed to ensure accurate data collection and reporting of CallPoint Records.

Prior to completing client level data entry

- Discuss your agency's Privacy Notice with the client and ensure proper understanding.
- **Enter Data As** must be used if collecting data for a project other than the Users default project.
- If your program shares client data, with their consent, that is not covered by the Privacy Notice, use the **Enter Data As** (EDA) function and select the correct provider.

CallPoint

CallPoint > Call Record Search

Type here for Global Search

Call Record Search

If you do not enter search criteria, search results will be limited to the previous seven days worth of data.

Search for Call Records by using keywords for Client name, Call ID, or User ID.

Search Show Advanced Search

Search Clear Start New Call

Show MY Calls Only

1. Access the CallPoint Module
2. Start New Call
3. If client identifying information is provided, connect client with a client record, conducting a partial name search. If the client is not already in the system, complete all of the data fields, and add the client as new.

If client identifying information such as Name, DOB, or SSN cannot be assessed, DO NOT connect the call record to ClientPoint. However, if a call is not connected with a client record, Users will not see the Client Information tab

3 + This Call Record has not been linked with a Client Record.

Caller Name	First <input type="text"/>	Middle <input type="text"/>	Last <input type="text"/>	Suffix <input type="text"/>
U.S. Military Veteran?	-Select- <input type="text"/>			

CallPoint SP5.14

Current Call



1. Select Call Type and Caller Type from the list
2. Caller Alias may be entered if applicable
3. Enter the client's phone number or the number they are calling from
4. Enter a brief note about the interaction (optional)
5. Complete any assigned assessments. If the record has been connected to ClientPoint, you can import existing assessment data by selecting at the top of each assigned assessment. However, it is important to review each field for completeness and accuracy, updating as needed.
6. Follow-up information is an optional feature. A follow-up can be scheduled for yourself or another User, so that a reminder will appear on their **Home Page Dashboard** to follow-up on this case at a later time.
 - a. Enter the date that you/staff would like to follow-up with the client by
 - b. Select the provider and User to complete the follow-up. Users are listed by the provider that their User log-in is created under.
7. Save

Client Information



Complete the Standard Workflow as Referenced in the [Standard Workflow Summary](#), including Household, ROI, Entry/Exit, Service Transactions, and Case Manager tabs.

This tab will not appear if the call record is NOT connected to ClientPoint. If the client's identifying information cannot be obtained, DO NOT connect the record, and move onto the next step: **Referrals and Services**.

Referrals and Services



Referrals

A referral should be entered when tracking and reporting on client needs and referrals.

1.
2. Select up to 5 Needs from the Service Code Quicklist or use the Service Code Look-Up
3. Select Add Terms/Add Terms & Go To Search Results

CallPoint SP5.14

*If you are unable to find a service/provider you are looking for, please create a ticket with the HMIS Help Desk, nilhmis.cayzu.com, for assistance. *

4. Select the Referral Provider(s) from the Referral Provider Quicklist or from the Search Results.
5. Search results can be filtered by physical location or service area, in addition to providers that use ServicePoint.
6. Results will show the number of needs selected that this provider has a service for.
7. The Needs Referral Date will default to the system date and time.
8. Referral Ranking leave at Select, unless instructed otherwise.
9. Follow-up information is an optional feature. A follow-up can be scheduled for yourself or another User, so that a reminder will appear on their Home Page Dashboard to follow-up on this case at a later time.

The screenshot displays the 'Refine Provider Search Criteria' and 'Search Results' sections. The search criteria section includes fields for City, State, County / Parish (set to Dupage), ZIP Code, and Type. Below these are buttons for 'Search' and 'Clear All'. The search results section shows a table with columns for Provider, Type, Phone, Location, Distance, and Matched Needs. A 'Referral Data' section is also visible, containing fields for Needs Referral Date, Referral Ranking, VI-SPDAT Score, Projected Follow Up Date, and Follow Up User. A 'Referrals' table at the bottom shows referred-to providers and their associated services.

Referral Data	Needs Referral Date *	Referral Ranking	VI-SPDAT Score	Projected Follow Up Date	Follow Up User
	03 / 22 / 2016	-Select-	Please Select a VI-SPDAT Score	03 / 25 / 2016	DuPage CoC Coordinated Entry & Referral (7593) Julie Tremberth-Agency Admin

Referrals	Emergency Shelter	Rental Deposit Assistance
Catholic Charities-Emergency Services-Homeless Prevention (5129)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DuPage PADS - Interim (overnight) Housing (5155)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- a. Enter the date that you/staff would like to follow-up with the client by
- b. Select the provider and User to complete the follow-up. Users are listed by the provider that their User log-in is created under.
10. 'Check to notify ServicePoint Providers by Email' requires provider set-up and Recipient access to reporting. DO NOT select unless you have been instructed otherwise. Users are encouraged to notify programs directly to coordinate referrals.
11. Mark what Need is being referred to which of the selected providers and add any additional details such as amount needed.
12. A summary of the provided referrals may be sent to the client by selecting 'Send Summary' and entering the recipient's email address.
13. Save All.

Services

A service should be recorded if a service is provided. Refer to the [Standard Workflow Summary](#) and the [Service Transaction Addendum](#) for more information.

End Call

1. From the top or bottom right-hand corner of the screen, select the Call Status from the list.
2. Save & End Call.