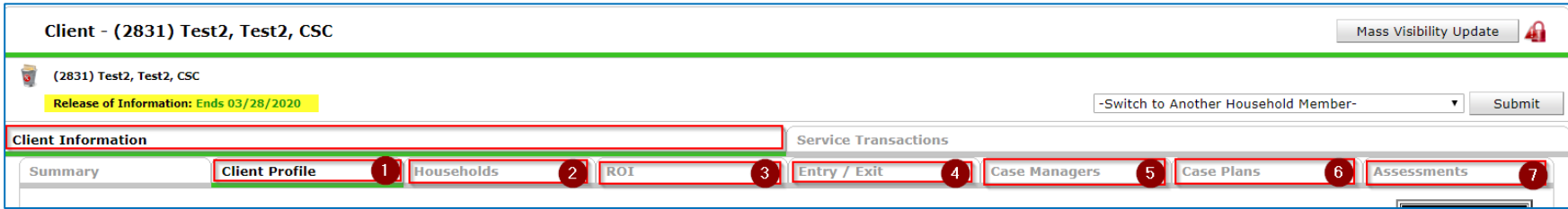

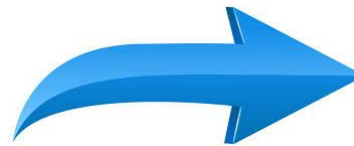


GOLDEN RULE:

Enter data in ServicePoint using the SEQUENTIAL ORDER OF THE TABS! No data should be entered on a tab until all data points in the previous tabs are complete.



Client - (2831) Test2, Test2, CSC Mass Visibility Update 
 (2831) Test2, Test2, CSC -Switch to Another Household Member-
 Release of Information: Ends 03/28/2020
Client Information | Service Transactions
 Summary | **Client Profile** 1 | Households 2 | ROI 3 | Entry / Exit 4 | Case Managers 5 | Case Plans 6 | Assessments 7



1. Client Profile Tab

- Do you have duplicate profiles for this client?
- Double check you're good on FOIP

2. Households Tab

- Have you completed the Client Profile Tab?
- How many households do you have? How many do you need?
- Who is your Head of Household (HoH)? Is their relationship to HoH correct?

3. ROI Tab

- Have you completed the Client Profile & Households tabs?
- Is there a valid ROI? Is it about to expire?

4. Entry/Exit Tab

- **Have you completed the Client Profile, Households, and ROI tabs?**
- **Is my client active in my program? Do they have an entry?**
- **How many of my Agency's programs are they active in? (How many should they be?)**

5. Case Managers Tab

- **Have you completed the Client Profile, Households, ROI and Entry/Exit tabs?**
- **Have I assigned a Case Manager?**

6. Case Plans Tab

- **Have you completed the Client Profile, Households, ROI, Entry/Exit and Case Managers tabs?**
- **Have I created the case plans/folders?**
- **Does my ROI cover the dates for all historical folders I need access to?**

7. Assessment Tab

- **Have you completed the Client Profile, Households, ROI, Entry/Exit, Case Managers tabs and Case Plans tabs?**
- **Do I need to backdate my assessment?**