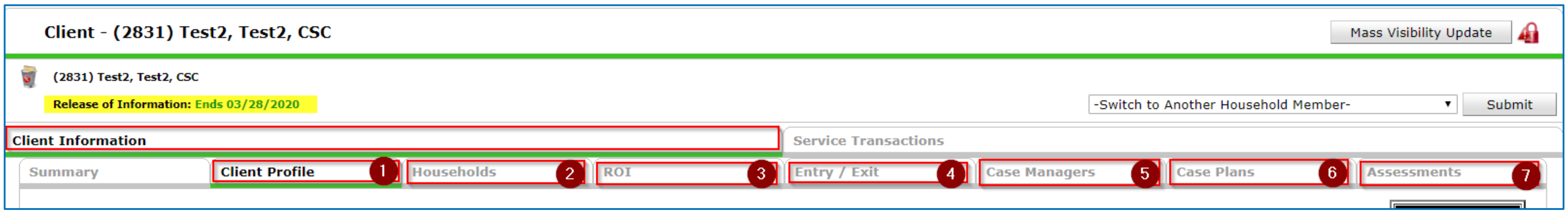
GOLDEN RULE:

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.



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?**