Modifying Client Visibility in ServicePoint

ROI Preparations

1. Determine the type of client information to be shared
    a. Basic Universal
    b. Assessments
    c. Case Plan Attachments
    d. SPDAT
    e. Entry/Exit
2. For each type of information, you will need to do the following
    a. Determine timeframe of information entry
    b. Determine which ServicePoint projects were involved in data entry
    c. Processes per Type:
        i. Assessments:
            1. Goto the Assessments Tab
            2. Open an assessment to be shared
            3. Click on a question's history bar (green/red/brown)
            4. Note the oldest date for your entries
            5. Note the Project(s) for your entries
        ii. Case Plan Attachments
            1. Goto the Case Plan Tab
            2. Note the oldest date for the file(s) to be shared
            3. Note the Provider for the file(s) to be shared
        iii. SPDAT
            1. Go to Measurements Tab
            2. Click "Intake" of the SPDAT that needs to be shared.
            3. Note the Date of the SPDAT
            4. Note the Provider of the SPDAT
        iv. Entry/Exit
            1. Goto the Entry/Exit Tab
            2. Note the oldest date of the Entry/Exit to be shared
            3. Note the Program (Provider) for your Entry/Exit

ROI Determinations & Creation

3. Of all the noted dates, choose the oldest date
4. Of all the noted providers, count the unique providers
    a. This is the number of ROIs you need to create
5. Create the ROIs *(This must be done prior to sharing the information)*
    a. Goto the ROI Tab
    b. Click Add *Release of Information*
    c. Check the box to select the entire family
    d. Search for one of the unique providers determined in step 4.
    e. For *Release Granted*, choose **Yes**
    f. For the *Start Date*, enter the oldest date noted in step 3.
    g. The *End Date* should allow for sufficient time for the other program to review the data (one year default)
    h. For *Documentation*, choose an appropriate answer
    i. For Witness, type your name
    j. Click *Save Release of Information* Button
    k. Repeat for all unique noted Providers

Sharing the Client Information (By Information Type)

6. Determine which Provider Project(s) need to see the information
7. For each type of information, complete the type specific instructions (steps 8–12)
8. For **Basic Universal Information** (name, ss#, veteran status, etc.)
    a. Click on the Summary Tab
    b. Locate and click on the Visibility Lock
        i. To the Right of the Header Bar
        ii. Ex: Client – (HMIS#) Last, First
    c. On the resulting window, click on *Add Visibility Group* button
    d. Search for the first unique Provider determined in step 4
    e. Find and click the Green Plus next to the provider
    f. Repeat the *Add Visibility Group* Process for each unique provider
    g. Click Exit
9. For **Assessments** (Universal Entry/Exit, Confidential Dimensions, etc.)
    a. Click on the Assessments Tab
    b. Choose the Assessment to be shared and click the *Submit* button
    c. Locate and click on the Visibility Lock
        i. on the header bar for the assessment
    d. On the resulting window, click on *Add Visibility Group* button
    e. Search for the first unique Provider determined in step 4
    f. Find and click the Green Plus next to the provider
    g. Repeat the *Add Visibility Group* Process for each unique provider
    h. Click Exit
10. For **Case Plan Attachments**
    a. Click on the Case Plan Tab
    b. Find and click on the Visibility lock for the file
        i. Right and side of the file bar
    c. On the resulting window, click on *Add Visibility Group* button
    d. Search for the first unique Provider determined in step 4
    e. Find and click the Green Plus next to the provider
    f. Repeat the *Add Visibility Group* Process for each unique provider
    g. Click Exit
11. For **SPDAT**
    a. Click on the Measurements Tab
    b. Find and click on the Visibility lock for the file
        i. On the header bar for the SPDAT
    c. On the resulting window, click on *Add Visibility Group* button
    d. Search for the first unique Provider determined in step 4
    e. Find and click the Green Plus next to the provider
    f. Repeat the *Add Visibility Group* Process for each unique provider
    g. Click Exit
12. For **Entry/Exits**
    a. Click on the Entry/Exit Tab
    b. Find and click on the Edit (Pencil) for the Entry or Exit to be shared
    c. On the resulting page, click the *Save and Continue* button
    d. Find and click on the Visibility lock for the file
        i. To the left of each household member
    e. On the resulting window, click on *Add Visibility Group* button
    f. Search for the first unique Provider determined in step 4
    g. Find and click the Green Plus next to the provider
    h. Repeat the *Add Visibility Group* Process for each unique provider
    i. Click Exit
    j. Repeat the Visibility Lock Process for each household member to be shared.