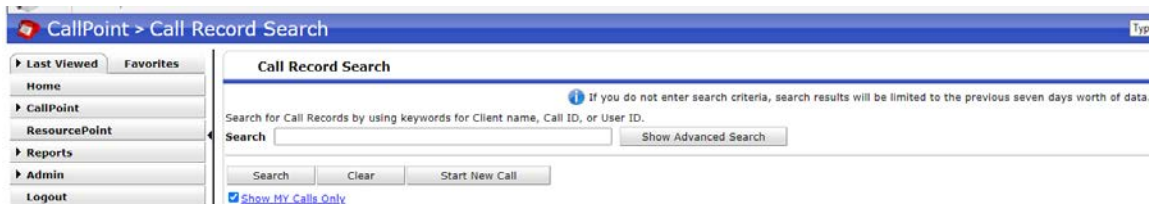


CallPoint Quick Start

When you log in to ServicePoint, navigate to CallPoint using the menu on the left.



When you have a caller on the line, click on “Start New Call.”



Begin the call by asking the caller’s name and veteran status, enter this information, and click the green circle with the plus sign in it to link a client record.

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

Caller Name	First <input type="text" value="Gwen"/>	Middle <input type="text"/>	Last <input type="text" value="Stacy"/>	Suffix <input type="text"/>
U.S. Military Veteran?	<input type="text" value="No (HUD)"/>			

If matched clients appear below the search fields, ask your caller for the last four of their social or for their date of birth to match them to an existing file. If their file is in the list below, simply click the green circle with the plus sign in it to select that client. If they are not in the list, complete all fields shown in accordance with the instructions in [Creating a Client](#).

Client Search

Please Search the System before adding a New Client.

Items in *Italics* are for Data Entry ONLY and will not be used for Search Results.

Name	First <input type="text" value="Gwen"/>	Middle <input type="text"/>	Last <input type="text" value="Stacy"/>	Suffix <input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
U.S. Military Veteran?	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			
Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DOB Data Quality	<input type="text" value="-Select-"/>			
Gender	<input type="text" value="-Select-"/>			
Primary Race	<input type="text" value="-Select-"/>			
Secondary Race	<input type="text" value="-Select-"/>			
Ethnicity	<input type="text" value="-Select-"/>			

Search Clear Add New Client With This Information

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
	103719 Stacy, Gwen A	999-99-9999	05/01/1991		Female	2

Showing 1-1 of 1

Please email hmisrequest@councilforthehomeless with any additional questions.

Leave the “Call Type” and “Caller Type” fields as their default. The “Call Notes” section is not required. If you selected an existing client in the previous step, click the “Import Client Data” button to add any previously collected information to the call.

The screenshot shows a web form with three tabs: 'Current Call', 'Previous Calls (1)', and 'Client Information'. Under 'Current Call', there are fields for 'Call Type *' (set to 'Coordinated Entry (all literally homeless)'), 'Caller Type *' (set to 'Self'), 'Caller Alias', and 'Phone Number'. To the right is a 'Call Notes' text area. Below these is a 'Hotline Script Header' section. At the bottom, there are two sections: 'Assessments' with a checked checkbox for 'HSC Screening (2019 Update)', and 'HSC Screening (2019 Update)' with an 'Import Client Data' button.

If this client is a single adult, simply answer all questions below the “Import Client Data” button (see [Working with Sub-Assessments](#) for insurance, disabling conditions, non-cash benefits, and income).

For all other household compositions, click the “Client Information” tab and look for a household that has the correct people in it. If one exists, click the “Manage Household” button; if one does not, click the “Start New Household” button (in the latter case, refer to the second page of [Creating a Household](#) for instructions). Complete all questions for all clients, using the list of clients on the left to navigate, then click “Save and Exit.”

The screenshot shows the 'Client Information' tab with a sub-tab 'Households'. A dropdown menu shows '(45191) Couple With No Children'. Below is a table with columns: Name, Age, Head of Household, Relationship to Head of Household, Joined Household, Previous Associations, and Household Count. Two rows are shown: (103719) Stacy, Gwen A and (103720) Warren, Miles. A 'Manage Household' button is below the table. At the bottom, there are 'Search Existing Households' and 'Start New Household' buttons.

Click the red (expired/missing) or green (valid) text after “Release of Information” at the top of the page. Do not change the start date, set the end date to one month away, set the Documentation to “Verbal Consent,” and set the witness field to your name. The checkbox must be checked for all current household members.

The screenshot shows a call record header: 'Call Record (8958) - 10/21/2020 08:52 AM'. Below is a client name: '(103719) Stacy, Gwen A'. At the bottom, there are several fields: 'Alias: -Not Set-', 'Social Security Number: 999-99-9999', 'SSN Data Quality: Full SSN Reported (HUD)', 'U.S. Military Veteran?: No (HUD)', and 'Release of Information: Expired'.

If there is a shelter spot available for this household, click the “Add Referral” button (this button is available on the bottom left and top left of the call). Follow the [Making a Referral](#) instructions to add a referral to the appropriate shelter.

In the bottom right of the call, set the Call Status to “Complete” and end the call.