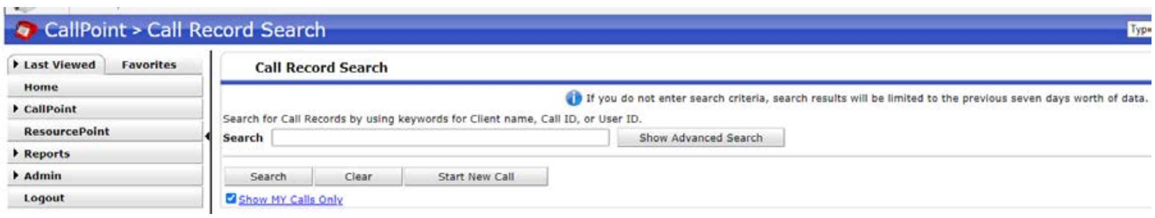
CallPoint Quick Start

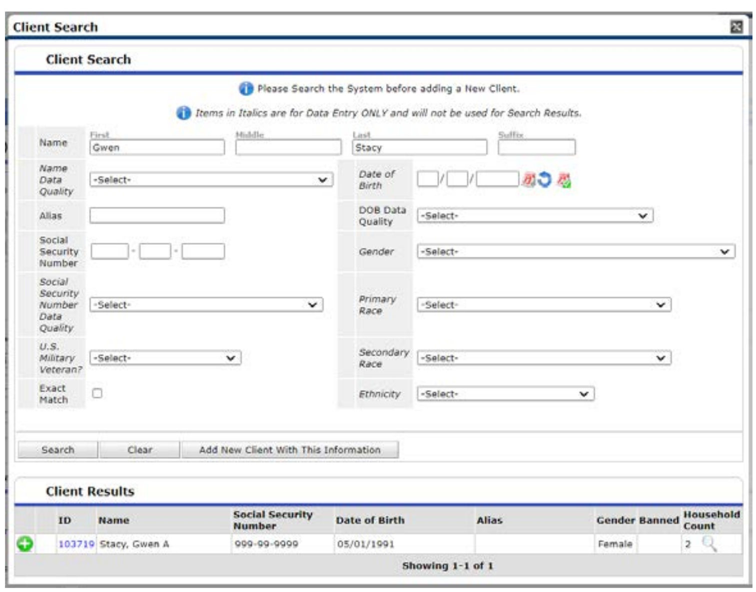
When you log in to ServicePoint, navigate to CallPoint using the menu on the left.

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



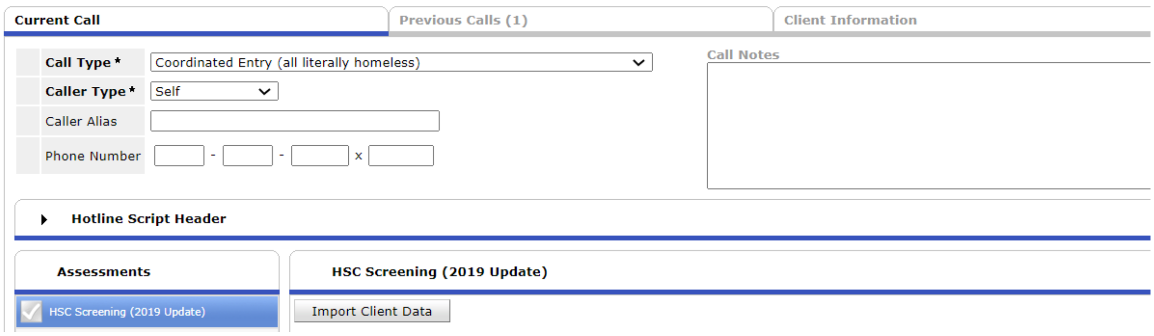
Begin the call by asking the caller’s name and veteran status, enter this information, and click the green circle with the plus sign in it to link a client record.

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.



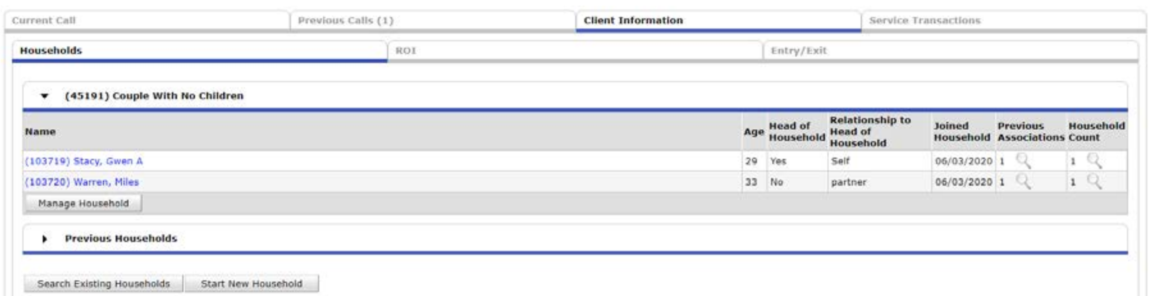
Please email hmisrequest@councilforthehomeless with any additional questions.

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.



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.”



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.

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.