BACK DATE MODE WALKTHROUGH GUIDE

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BACK DATE MODE OVERVIEW

The Back Date Mode feature allows users to enter assessment data for a date prior to the current date and time. This is useful for Users who are not able to do live data entry with a client present. Back Date Mode time stamps the Date Effective used for reporting of the data as of the date being Back Dated to. It is used often for editing information that was relevant in the past as well. To enter data in Back Date Mode, and set the correct Date Effective, click on Back Date Mode and enter the date to needed for backdating.

It is important to note that Back Date Mode only works in ClientPoint and applies to all functionality within the ClientPoint module of ServicePoint. Back Date Mode allows for an historic build-up of information, so that changes over time can be seen.

ENTERING DATA IN BACK DATE MODE

Creating a new Client in Back Date Mode:

1. Click the *Back Date* in the information bar **(1)**. (See Figure 1-1)

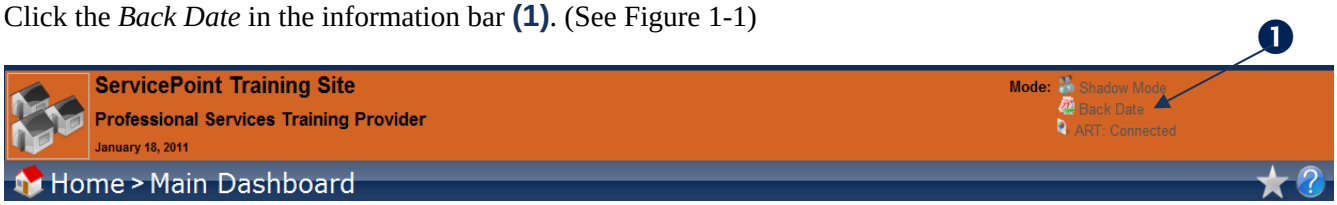


Figure 1-1

2. Enter the date that you need to Back Date to and click on "Set Back Date" **(2)**. (See Figure 1-2)
   a. If you interviewed a client for your Provider on 04/10/2009 but you are sitting at your desk in ServicePoint doing your data entry on 05/01/2009, set the back date to 04/10/2009. That is when you actually saw and assessed the client.
   b. If you interviewed your client on 04/01/2009 and the client physically presents to your program for Entry on 05/20/2009, back date to 04/01/2009. This way all your data will be relevant to when the client's Entry Exit has started.
   c. If you interviewed your client on 04/01/2009, your client physically presents to your program for Entry on 04/01/2009, but you are actually sitting at your desk in ServicePoint doing Data Entry on 05/01/2009, Back Date to 04/01/2009. That is when you saw your client.

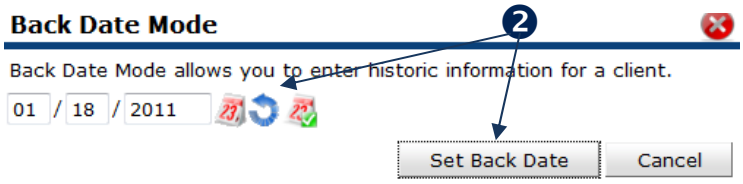


Figure 1-2

3. Back Date Mode is indicated by the top information bar will be yellow and the Back Date indicates the backdate. (See Figure 1-3)

Figure 1-3

4. Click the ClientPoint Icon on the left hand menu **(3)**. (See Figure 1-4)

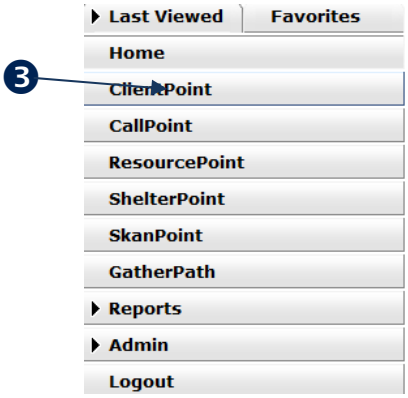


Figure 1-4

5. Enter your clients name in the **First Name**, **Last Name**, and **Social Security Number (4)** fields and Click on **Search for Client (5)**. (See Figure 1-5)
6. Because this is a new client, you should get no results back, click on **Add Client With This Information (6)**. (See Figure 1-5)

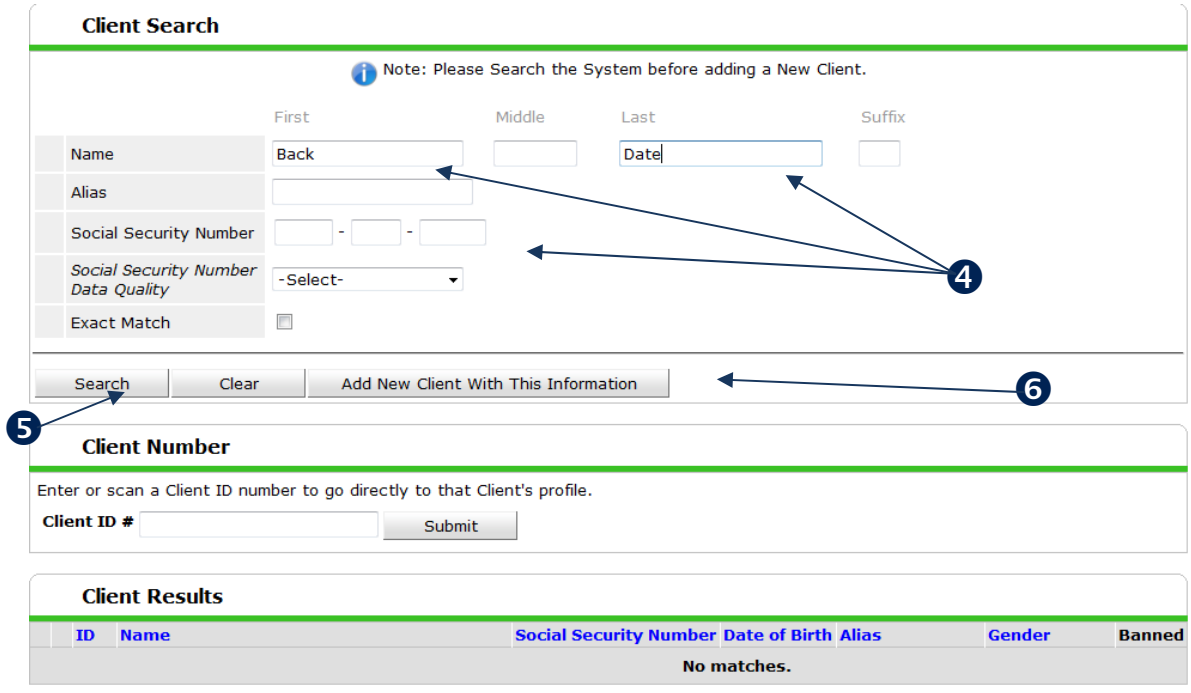


Figure 1-5

7. A warning window will pop up alerting you that you are creating a new client. Click **OK**. (See Figure 1-6)

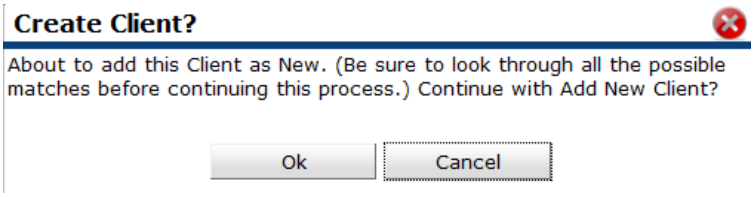


Figure 1-6

8. The window will close and you will be put into the new client's **Profile or Summary** screen. From this point forward all data entered, assessment, sub-assessment, Entry/Exit, Case Management, Services, Household maintenance, etc., will be backdated.
9. Once you are finished editing this client's information, click on the date showing in Back Date section of the top Information Bar to end **Back Date Mode** and return to today's date and time **(7)**. (Figure 1-7)
    a. If you need to enter multiple client's data that were all assessed on the same day and time, you can navigate *ClientPoint* as you normally would and edit/add new clients stamped with the **Back Date Mode Date**.

Figure 1-7

10. You have successfully entered a client's data in **Back Date Mode**.

IMPORTANT

As long as you see a yellow bar running horizontal on your screen, you are in **Back Date Mode**. Entering different tabs such as SkanPoint, CallPoint, and *Reports* will not end Back Date Mode. The only way to exit **Back Date Mode** is to either click on the date for Back Date or to *logoff* of *ServicePoint*. You will be unable to enter into ShelterPoint until you exit Back Date Mode

Creating new Household Members

Scenario A: Creation of a New Household

If you are creating a brand new household, follow Steps 1 through 8 in the previous section and do not Exit Back Date Mode until you are finished creating the household and all other required tasks within ClientPoint.

Scenario B: Add Clients to an Existing Household

If you are adding new clients to an existing household, enter **Back Date Mode** by following Steps 1 through 3 in the previous section. You will then search for the **Head of Household** you wish to add the new household member to. Here are some circumstances to consider, (Note: Back Date Mode must be entered to before searching for any client):

a) If Jane Smith entered the program on 01/01/2009, and gave birth to Jenny Smith on 05/01/2009, the Back Date would be 05/01/2009. You would go to Jane Smith's Profile and edit the household accordingly, adding Jenny into it. All of Jenny's data would then be relevant as of 05/01/2009.

ENTRY EXITS AND BACK DATE MODE

Entry Exit worksheets are a unique feature in *ServicePoint*. This is because it will **Back Date** all fields answered to the date of either the **Entry** or the **Exit**. For example, if you are creating an **Entry Exit** with an Entry of 04/01/2009 at 3:00pm and you change the status of a question, or add a new sub-assessment entry (such as Income or Disability), it will date those responses as being relevant to the Entry date and time of 04/01/2009 at 3:00pm.

It is also important to talk about what date and times you use for **Back Date Mode** and **your Entry Exit Entry Dates** and **Exit Dates**. **Specifically, an assessment will not display on the Entry Exit if it was assessed after the Entry Date or the Exit Date.** For example, "Gender" is answered in Back Date Mode on 03/01/2009. Create an **Entry Exit – Entry** that has an **Entry** date of 02/01/2009. Your response for "Gender" will not show on the **Entry Exit** because "Gender" was answered after 02/01/2009. This guide will go into more detail with these examples in the last section titled "Common Issues and Errors".

Essentially there are two ways to backdate and Entry or Exit. The first is to follow steps 1 through 8 in the first section of this document. By putting ServicePoint in Back Date mode all information is automatically backdated. The second method is to create an Entry Exit and Back Date the Entry and/or Exit dates thereby backdating all information attached to that worksheet.

Creating an Entry Exit Using the Entry Worksheet

1. Click on the **Entry Exit** Tab **(1)**. (See Figure 3-1)

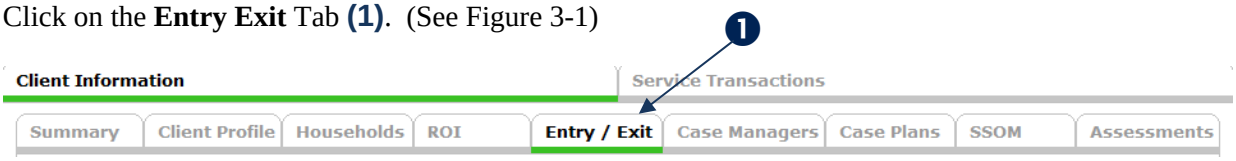


Figure 3-1

2. Click on the **Add Entry/Exit** button **(2)**. (See Figure 3-2)

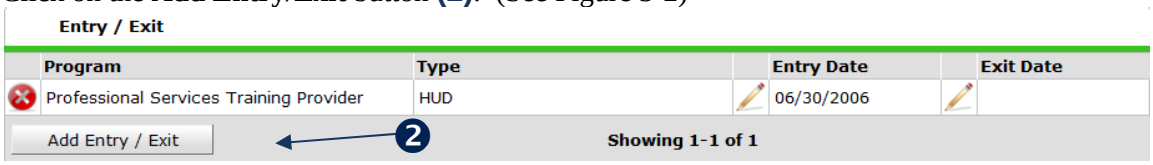


Figure 3-2

3. The window will refresh to show your **Entry Exit – Entry Data**. Select the appropriate type of Entry Exit **(3)**. Enter the correct date and time for the Entry Date **(4)**. This is what will backdate all information in the Entry Worksheet. When finished select "Save & Continue." *(Note: The Provider should have already been changed using the "Enter Data As".)* (See Figure 3-3)

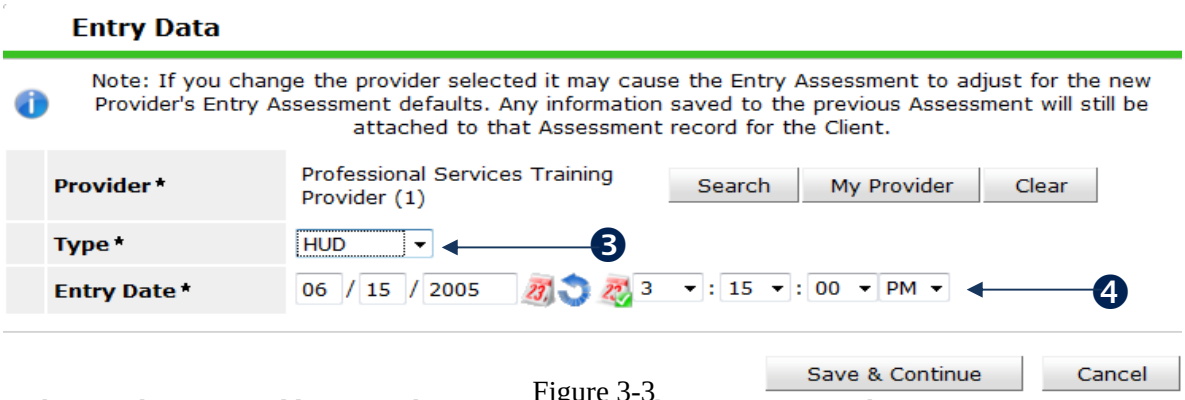


Figure 3-3

4. Make any changes or additions to the assessments or sub-assessments in the **Entry** screen.
   a. Note that anything you add or edit will be relevant to your **Entry Date**.
   b. Example: Clicking on the **Add** button for the **Income Sub Assessment** will show the following. Note you are in **Back Date Mode** with the date of the **Entry Date** being 06/15/2006. (See Figure 3-4)

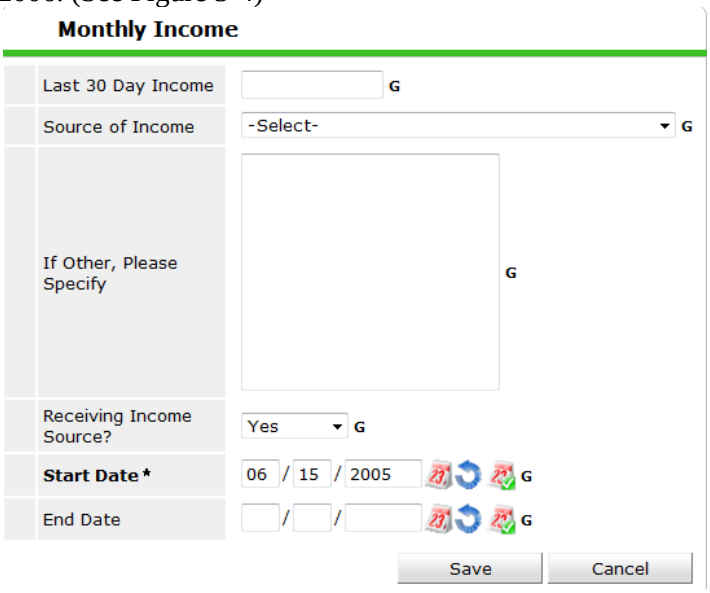


Figure 3-4

5. Once you are finished, click **Save and Exit** at the bottom of the Entry Screen.
6. You have successfully created an **Entry Exit**.

7. Because the assessment questions in the **Entry Exits** are identical to assessment questions located elsewhere in *ClientPoint*, any responses to the assessment questions in the **Entry Exit** are time stamped with the **Entry** or **Exit** date. In this example, we have an **Entry Exit** with an **Entry** of 06/15/2005. We changed one question, **Ethnicity**, to a "Non-Hispanic/Non-Latino (HUD)" response. Then we click **Save and Close.** (See Figure 3-5)
8. Click on the indicator bar on the left hand side of the "Ethnicity" question to view the history **(5)**. It does not matter where the assessment is located. (See Figure 3-5)
9. We will see that the response from the **Entry Exit** is valid **(6)**. (See Figure 3-5)

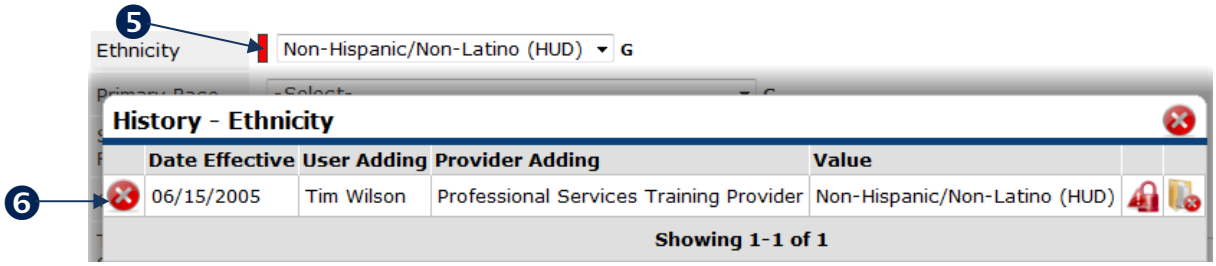


Figure 3-5

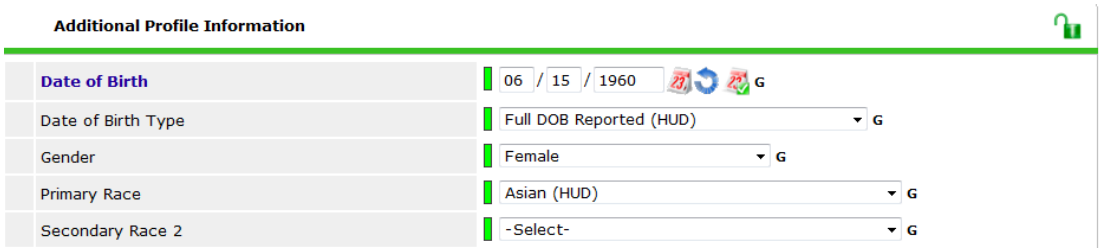
COMMON ISSUES AND ERRORS

Profile Errors

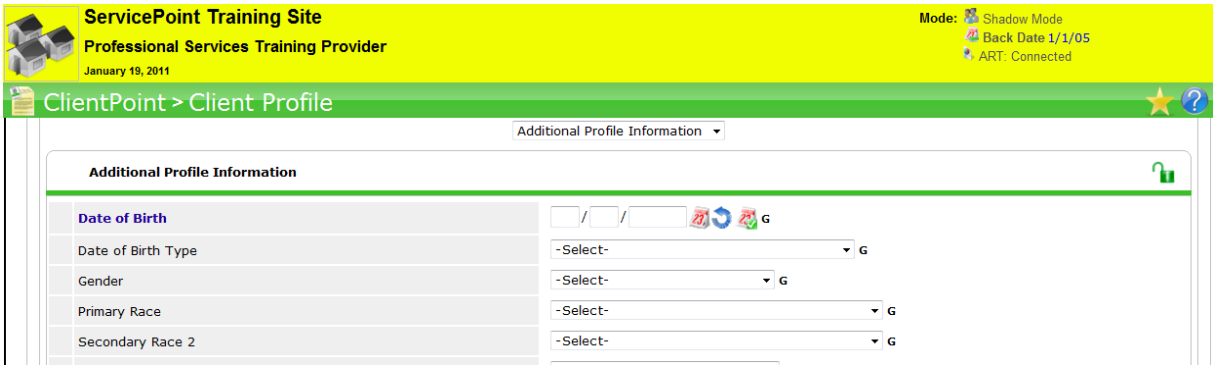
Q) I entered an Back Date, and all the data and responses I had on my screen disappeared. Why is everything blank, I know I answered them?

A) You did answer them, relevant to that later date. If you entered data on 03/01/2009 and then **Back Dated** to 01/01/2009, you will not see any of those responses from 03/01/2009 because they were answered in the future. A real world example would be power outages. Do you know when your next power outage will be? Unless you are from the future (or work for the power company), you will not know when your power will flicker until it happens. From that point on you know when it happened.

1. For example, you answered everything without using Back Date Mode. Data will appear like this:



2. If you were to enter into a Back Date of 01/01/2005, data would appear like this:



3. All your data "disappears". It is in the system, it is just not displaying now because it is not relevant to the date.

RESOLUTION: Users primarily encounter this because data is entered before the end user enters into Back Date Mode. The problem is they did not **Back Date** in the first place. No matter where end users **Back Date** data will not be visible because it is not relevant to that date that is being back dated to. Make sure all information is entered correctly, with the correct **Back Date Mode** date.

Q) The Assessments were filled out, but I needed to change one response in Back Date Mode. So I changed the response, then I changed the Assessment Date and clicked Back Date Mode. But now all the answers are gone except what I changed. What happened?

A) Only the assessment response you changed will be relevant to the **Back Date Mode**. Anything that you did not edit or add in **Back Date Mode** will not show because it was answered after the date you are backdating to.

RESOLUTION: Make sure you enter all your information correctly, with the correct **Back Date Mode** date. If you do not enter your information correctly in the first place, you will run into this issue often.

Q) I went into Back Date mode because I needed to answer a question relevant to that date, but now it's forcing me to answer the required questions as well. I didn't write down the responses of the required questions; is there a way to bypass them just to answer my one question?

A) If you encounter this you do have an option rather than saving your work to cancel your work. By selecting cancel you will then be able to exit out of Back Date Mode or switch screens.

WALKTHROUGH GUIDE SUMMARY

New Client

- ☐ Click Back Date and Enter the Date you wish to Back Date to and select "Set Back Date."
- ☐ The screen will refresh and the Information Bar will have be yellow confirming you are in Back Date Mode
- ☐ Enter ClientPoint.
- ☐ Search for the client.
- ☐ Input the First name, Last name, and Social Security number. Click Add Client With This Information.
- ☐ On the Profile screen, fill out the assessment questions.
- ☐ Add your Household information, if present.
- ☐ Create your Entry Exit. The Entry Date needs to be on or after the Back Date Mode date.
- ☐ Click on the date displayed for Back Date to return to Live Mode when finished entering all data needed to be entered in Back Date Mode.

The following items can be completed while in Back Date Mode and will be backdated.

- ☐ Create a Release of Information.
- ☐ Create a Case Worker worksheet.
- ☐ Create a Case Plan, if necessary.
- ☐ If your client received Needs, Services and/or Referrals, create the Service Transactions.
- ☐ SSOM
- ☐ Assessments
- ☐ Click on the date displayed for Back Date to return to Live Mode when finished entering all data needed to be entered in Back Date Mode.

Existing Client

- ☐ Click Back Date and Enter the Date you wish to Back Date to and select "Set Back Date."
- ☐ The screen will refresh and the Information Bar will have be yellow confirming you are in Back Date Mode
- ☐ Enter ClientPoint.
- ☐ Search for the client.
- ☐ Click on the Client's name in the Possible Matches section.
- ☐ Add or Edit your responses to the assessment fields and do any additional data entry as necessary. Reminder: ServicePoint 5 will now Back Date all items within ClientPoint so all of the following may now be backdated:
    - Households.
    - Create your Release of Information (if necessary).
    - Create or edit a Case Worker worksheet.
    - Create or edit a Case Plan, if necessary.
    - If your client received Needs, Services and/or Referrals, create or edit the Service Transactions.
    - SSOM
    - Assessments
- ☐ Create or edit your Entry Exit. If creating a new Entry Exit, the Entry Date will automatically be the datre you backdated to.
- ☐ Click on the date displayed for Back Date to return to Live Mode when finished entering all data

needed to be entered in Back Date Mode.

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