



CIS Training/Committee Meeting

Agenda

October 16, 2019

9am-12pm

Charlotte Community Foundation

- ❖ Sign-In
- ❖ Welcome and Training/Committee Members Introductions
- ❖ Resources
- ❖ Definitions
- ❖ Updates
- ❖ ServicePoint
 - Enter Data As (EDA)
 - Back Date Mode
 - Client Search/Creation and Households
 - Universal Release of Information (ROI)
 - Entry/Exit including Contact Information and Assessment
 - Case Manager
 - Case Notes
 - Service Transactions & Referrals
 - Reports and Common User Errors
- ❖ Open Discussion and Questions

Next meeting: October 29, 2019