



Buffalo Area Services Network
Homeless Management
Information System

BAS-Net Site Contact
Training Manual

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**Buffalo Area Services Network (BAS-Net)
Homeless Management Information System
BAS-Net Site Contact Training Manual**

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Part One: BAS-Net Administration

There are a variety of different individuals and entities that work together to ensure the success of BAS-Net. Some work to develop policies and engage in support roles, while others interact directly with clients to ensure accurate data is included in the community-wide system. Each must work together with the hope of benefiting homeless clients, their families, area programs, and the larger community.

A list of the key players involved in the administration of BAS-Net follows:

<p>Bowman Internet Systems</p>	<p>Responsible for the delivery of Internet-based client assessments and reporting features.</p> <p>Bowman Internet Systems will provide secure, on-going access to its ServicePoint, ShelterPoint, and ResourcePoint applications via the Internet. In addition, Bowman Internet Systems will also provide information about any system modifications and/or upgrades.</p>
<p>Homeless Alliance of Western New York (HAWNY)</p>	<p>Responsible for the administration and staffing of BAS-Net.</p> <p>HAWNY will secure funding for the BAS-Net system and provide organizational oversight through its Board of Directors and the BAS-Net Advisory Committee. HAWNY will also provide regular staffing for the project.</p>
<p>HAWNY Board of Directors</p>	<p>Responsible for providing organizational oversight for the BAS-Net system through review of policy and procedures identified by the BAS-Net Advisory Committee.</p>
<p>BAS-Net Advisory Committee</p>	<p>Responsible for developing and reviewing all system-wide policies and procedures for BAS-Net.</p> <p>In selecting participants for this committee, HAWNY will attempt to secure and maintain representation from each:</p> <ul style="list-style-type: none"> • Homeless housing and service type; • HUD-identified homeless subpopulation; • Continuum of Care municipality; and from • Current and formerly homeless individuals <p>The BAS-Net Advisory Committee will provide input on an on-going basis for the local HMIS project. The Committee will share its recommendations with the HAWNY Board of Directors on the key issues that follow:</p> <ul style="list-style-type: none"> • Determining guiding principles for BAS-Net; • Selecting data elements to be collected by participating agencies; • Defining parameters for the release of aggregated HMIS data; • Evaluating compliance with HUD data and technical standards; • Reviewing the HMIS-related performance of participating agencies especially adherence to local policies and procedures; and • Addressing issues that arise from use of BAS-Net including, but not limited to, client grievances and policy adjustments.

<p>BAS-Net Administrator</p>	<p>The BAS-Net Administrator is responsible for the implementation and coordination of the local HMIS. The administrator will be the primary contact for HAWNY, the BAS-Net Advisory Committee, and BAS-Net Site Contacts.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Orienting prospective BAS-Net participants to system; • Maintaining a list of agency contacts and BAS-Net participants; • Providing oversight on all contractual agreements; • Assessing agency readiness for HMIS; • Providing regular trainings (SOP/Confidentiality/Applications); • Authorizing access to the BAS-Net system (Set-Up); • Developing client assessment tools not already included; • Providing basic technical assistance to participating agencies; • Facilitating access to hardware/other technical support; • Documenting database and policy/procedure changes; • Developing and evaluating performance objectives; • Updating “Standard Operating Procedures Manual;” • Auditing BAS-Net usage system-wide; • Developing reports and queries for Continuum of Care; • Presenting research findings to community stakeholders; • Coordinating regular user-group meetings; and • Communicating with participating agencies/larger community.
<p>BAS-Net Support Specialist</p>	<p>The BAS-Net Support Specialist’s primary responsibility is hardware and software coordination and maintenance for the local HMIS. The support specialist will serve as a secondary contact for HAWNY, the BAS-Net Advisory Committee, and BAS-Net Site Contacts.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> • Orienting partner agencies to BAS-Net by demonstrating HMIS functions and features, assisting in training sessions, and assessing HMIS readiness; • Providing computer support and technical assistance to partner agencies to ensure appropriate use of HMIS; • Tracking and resolving problems reported by agency users and perform follow-up on outstanding problems; • Assisting with the coordination of data integration, conversion and programming modification tasks with participating agencies and vendors to facilitate an integrated multi-agency database; • Identifying and developing needed training materials; and • Participating in BAS-Net User meetings to address on-going system enhancements, facilitate information sharing, and identify best practices.
<p>BAS-Net Site Contact</p>	<p>The BAS-Net Site Contact will serve as the agency contact for the project and will facilitate access to the HMIS at an organizational level.</p> <p>Each BAS-Net Site Contact will be responsible for:</p> <ul style="list-style-type: none"> • Participating in HMIS readiness assessment; • Identifying BAS-Net users and facilitating access to training; • Granting BAS-Net access only to authorized staff members that have received training and demonstrated proficiency in application use and understanding of policies and procedures; • Monitoring staff compliance with standards of client confidentiality and ethical data collection, entry, cleaning, and retrieval and enforcing established policy;

	<ul style="list-style-type: none"> • Enforcing business controls and practices to ensure organizational adherence to policies and procedures including detecting and responding to violations; • Providing on-site support for the generation of agency reports and managing user licenses; • Ensuring stability in the agency Internet connection either directly or in communication with a technician; and • Notifying users about interruptions in service. <p>Each agency must designate a primary BAS-Net Site Contact at each program location to increase effectiveness of communication both between and within agencies.</p>
<p>BAS-Net Agency Users</p>	<p>BAS-Net Agency Users are responsible for entering client data into the system as well as identifying needs and concerns regarding HMIS to their Site Contact.</p> <p>BAS-Net Agency Users will be responsible for:</p> <ul style="list-style-type: none"> • Being aware of the confidential nature of data and taking appropriate measures to prevent any unauthorized disclosure of client information; • Complying with all local HMIS policies and procedures; and • Reporting security violations to their BAS-Net Site Contact. <p>Agency users are also responsible for their own actions or any actions undertaken with their usernames and passwords.</p>

Part Two: Special Administrative Activities

Each BAS-Net site will have at least one person take responsibility for agency-specific administrative functions. Typically, this person will be the BAS-Net Site Contact but it is possible that these activities may also be assigned to other agency staff member.

Agency-specific Administrative Functions include:

1. Adding a Provider
2. Adding, Editing, and Deleting a User
3. Updating Agency News

Information about these three agency-specific administrative functions follows below.

Adding a Provider

1. Click on the Admin tab along the top of the ServicePoint navigation bar. The page will refresh and display a list of Administrator features.



2. Click on the "Admin Providers" link. The page will refresh and display a list of Agencies currently in the system.

[Admin Providers](#) - Add, edit, and classify Providers in your I&R database. Setup Taxonomy and Referral Quicklists. Specify areas served by each provider. Establish default security restrictions and exception lists. Build bedlists for use in ShelterPoint.

3. Locate and click on the Add New Top Level Provider button

Search Results <i>(refine your results or do a new search below)</i>			Add New Top Level Provider
Name	Type	Phone	Location
 Bowman Systems	Level 1	(318) 213-8780	Shreveport, Louisiana 71101
 Cornerstone Manor	Level 2	716-852-0761	Buffalo, New York 14203
 Homeless Alliance of Western New York	Level 1	716-853-1101	Buffalo, New York 14214
 Salvation Army	Level 2	884-4798	Buffalo, New York 14202

4. An “Add New Provider” window will appear.

Add New Provider - (Level) Save Changes Exit

Official Update by

Name

Status

Contact Person

Contact Title

Street Address

(more) Street Address

City

State

Zip

County

Area

Mailing Address

(more) Mailing Address

Mailing City

Mailing State

Mailing Zip

5. Complete the necessary information:

- Official Update: The first box is for the date of update and the second box is for the name of the person updating. Many communities perform formal updates of the provider database on a scheduled basis. If your community does, use this field to record that this provider update occurred during a formal update of providers. The Date of the update must be entered in MM/DD/YYYY format.
- Name: The Name of the new Agency goes here.

- Status: This is the status of the Agency within ServicePoint. It may be labeled as Active or Inactive. When creating a new Agency, it is automatically set to Active.
- Contact Person: This is the lead contact for the Agency
- Contact Title: This is the title of the lead contact for the Agency
- Street Address and (more) Street Address: Place the Agency's address here.
- City: Select the city that the Agency is located in from the City picklist. If the City you wish to select is not listed in the picklist, then it must be added by the Administrator. For more information on this, contact your System Administrator or see the Picklists section of this document.
- State: Select the state that the Agency is located in from the State picklist.
- Zip: Type in the zip code that the Agency is located in.
- County: Select the County or Parish that the Agency is located in from the County picklist. If the County or Parish you wish to select is not listed in the picklist, then it must be added by the Administrator. For more information on this, contact your System Administrator or see the Picklists section of this document.
- Area: Select the Area that the Agency is located in from the Area picklist.
- Mailing Address, (more) Mailing Address, Mailing City, Mailing State, Mailing Zip: Enter the mailing information of the Agency in these fields. See above listings for information on each topic.
- Telephone 1, 2, 3, and 4: Enter the Agency's phone number(s) in these blanks. Enter the description in the first box and the actual number in the second box.
- Fax: Enter the Agency's Fax number in this field.
- Email Address: This is the email address for all ServicePoint Referrals. Enter an email address for the person responsible for receiving referral emails.
- Website Address: Enter the Agency's website address in this field.
- Provider Type ID: Select the Provider Type that the Agency falls into from this picklist.
- Show on Public Site: If your Agency utilizes Bowman System's CommunityPoint website, then select this option to show this Agency on the CommunityPoint site.

- Printed Directory: A printed directory is a listing of the provider database. If a provider should not be included in the directory, flag this as No.
- Description: A brief description of the Agency may be typed here.
- Landmarks: If the Agency is located near any Landmarks used to help identify its location, then it may be entered here.
- Handicap Access: Select Yes or No to indicate whether or not the Agency's facility has Handicap access.
- Brochures: Select Yes or No to indicate whether or not the Agency carries Brochures.
- Hours: Enter the Agency's hours of operation here.
- Zips Served: Enter the zip codes that this Agency serves here.
- ServicePoint Interface: ServicePoint may present different interfaces to each provider. Purchase interfaces separately.
- Default City, Default State, and Default County: These are the pre-selected defaults that will appear for this user throughout ServicePoint. Creating defaults helps to speed up data entry.
- Program Fees: If the Agency requires Program fees, enter them here.
- Intake Procedures: Enter the Agency's Intake Procedures here.
- Eligibility: If the client must meet certain criteria to enter the Agency or Agency's program, then enter that information here.
- Languages: If this Agency supports multiple languages, enter them here.
- Is this Provider a Shelter?: If this provider operates a shelter, indicate Yes for this question. This will allow the shelter to appear under ShelterPoint and in Referrals as 'bed avail.'
- Shelter Requirements: Enter specific information regarding the requirements a client must meet to stay at the shelter.
- Shelter Service Code: Click the Set button to set the taxonomy code indicating the type of shelter. The code is simply a classification of the shelter using the AIRS taxonomy classification system.

- Master Flag: Set to Yes if your agency is responsible for administering the ServicePoint application
- Uses ServicePoint: If the agency will be accessing the ServicePoint application to track client data, select Yes.

6. Click on the Save Changes button to complete creation of the provider.

The screen will refresh allowing you to enter additional information about this provider.

1. **Provider Specific Services:** Use Provider Specific Services to specify a “Service Provided” without using an AIRS Taxonomy term. This would be something specific that your Agency offer. This list is populated in ServicePoint under Service Transactions. To add a service to this list:

Name	Status
Breakfast	Active
Dinner	Active
Lunch	Active
Support Group	Active

- a. Simply type in the name of the service you wish to add in the box for the Provider Specific Service field.
- b. Click on the Add Service button

2. **Areas Served:** This is the area that this Provider serves. To modify this section:

- a. Click on the Edit Areas Served button. A pop up window will appear.
- b. Click on the checkboxes next to all areas this Agency serves.
- c. Click on the Submit button.

3. **Bedlists:** A bedlist is simply a subsection of the beds provided by the shelter, i.e., a women's section or a men's section. A provider running a shelter can have a configuration of multiple bedlists. To add a bedlist:

- a. Click on the **Add Bedlist** button. The page will refresh and display the **Add New Bedlist** screen.

- b. Enter the name of the Bedlist in the field next to **Name**.
- c. Select the type of Bedlist you are creating from the **Type** picklist. (This list can be edited by your System Administrator).
- d. Click on the **Save Changes** button. The page will refresh and display the **Floor and Room Data** box.

- e. You can now add Floor and Room information. Even if you have only one floor and one room, you must still create at least one floor record. Click on the **Add New Floor** button.

- f. The page will refresh with a new **FLOOR** field. Enter the label for the Floor in the **FLOOR** text box. If you have multiple floors, click on the **Add New Floor** button until the correct number of floors appear on the screen. If you do not enter a name for the floor, ServicePoint will name the Floor ***New Floor*** by default.

Floor and Room Data

- g. After you have named the Floor, click on the **Add New Room** button to add rooms to the floor. The page will refresh and the room will be listed under the Floor. If you have multiple rooms on this floor, click on the **Add New Room** button next to the desired Floor until the correct number of rooms appear on the screen. If you do not enter a name for the room, ServicePoint will name the Room ***New Room*** by default.

Floor and Room Data

(0 beds)

- h. After you have created and named the Room, click on the **Edit Beds** button next to the room to add beds to the room. The page will refresh with Room data.

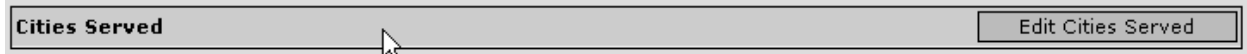
Bed Data

- i. Enter the number of beds in this room in the **Bed Data** textbox.
- j. Click on the **Add New Beds** button. The page will refresh with the number of bed fields that you entered in the **Bed Data** box.

Bed Data

- k. Name each bed. If you add under 100 beds, use 01, 02, etc. for one digit numbers. If you are planning to add 100 or more beds use 001, 002, 010, 011, etc. for one and two digit numbers respectively.
- l. Click on the **Save Changes** button. Click on the link next to Bedlist to return to the Bedlist screen and edit other Floors, Rooms, and Beds. To return to the provider screen, click the link with your provider name.

4. **Cities Served:** These are the cities that the Agency serves. To edit the cities served:



- a. Click on the Edit Cities Served button so a pop-up window with a list of cities appears.



- b. Click on the checkboxes next to the cities you wish to serve. If the city you wish to select is not listed, then it must be added by the BAS-Net Administrator.
- c. Click the Submit button.

5. **Counties Served:** These are the counties or parishes that the Agency serves. To edit the counties (or parishes) served:



- a. Click on the Edit Counties Served button so a pop-up window appears.



- b. Click the checkboxes next to the counties you wish to serve. If the county you wish to select is not listed, then it must be added by the BAS-Net Administrator.

c. Click the Submit button.

6. **Services Provided:** This is a list all of the services that the Agency/Provider provides. Use the AIRS Taxonomy listing to create this list. To add a Service Provided:

Services Provided		Add Service
Service Code	Description	
B	Basic Needs	
HH-050.250-25	GED Instruction	

- Click on the Add Service Provided Button so a pop-up window appears.
- Select the service code associated with the service the Agency provides. To do this, either use the black drill down arrows to locate a more specific topic, or use the search box.

[All](#)
[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)
[All](#)

Code Set: AIRS Taxonomy Search:

Search in all levels
 Search in this level only

[Top Level](#)

<ul style="list-style-type: none"> ↓ Basic Needs ↓ Criminal Justice and Legal Services ↓ Environmental Quality ↓ Income Security ↓ Mental Health Care and Counseling ↓ Target Populations 	<ul style="list-style-type: none"> ↓ Consumer Services ↓ Education ↓ Health Care ↓ Individual and Family Life ↓ Organizational/Community/International Services
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Sixth Supplement to the 3rd Edition of A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field, formerly titled The INFO LINE Taxonomy of Human Services. Published by the Information and Referral Federation of Los Angeles County, Inc., El Monte, California and the Alliance of Information and Referral Systems (AIRS), Seattle, Washington. Copyright 1983, 1987, 1991, 1994, 1998, 2002, 2003. All rights reserved by the Information and Referral Federation of Los Angeles County, Inc. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electrical, mechanical, photocopying, recording or otherwise, without the prior written permission of the Information and Referral Federation of Los Angeles County, Inc.

c. Click on the desired service so it is listed under Service Quicklist on the Agency Profile screen.

7. **Service Quicklist:** This is a list of services offered by a provider. Its purpose is to create a smaller list that allows the user to quickly search for a service rather than going through the long lengthy AIRS Taxonomy list. To add an item to the Agency's Service Quicklist:

- a. Click on the Add Service Button so a pop-up window appears.

Service Quicklist		Add Service
Service Code	Description	
HH-050.250-25	GED Instruction	

- b. Select the service code associated with the service the Agency provides. To do this, either use the black drill down arrows to locate a more specific topic, or use the search box.
- c. Click on the desired service so it is listed under Service Quicklist on the Agency Profile screen.

8. **Referral Quicklist:** The Referral Quicklist is a list of Agencies that users from this Agency frequently make referrals to. Its purpose is to speed up the data entry process. To add an Agency to the Referral Quicklist:

Referral Quicklist		Add Provider
Name		
	None.	

- a. Click on the Add Provider button so a pop-up window appears.

Enter Search Criteria			
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All			
Search Term	<input type="text"/>		
City	<input type="text" value="-Select-"/>	State	<input type="text" value="-Select-"/>
County/Parish	<input type="text" value="-Select-"/>	Area	<input type="text" value="-Select-"/>
ZIP	<input type="text"/>	Diagnostic/Service Code	<input type="text" value="lookup"/>
Type	<input type="text" value="-Select-"/>	<input type="text"/>	
<input type="checkbox"/>	ServicePoint users only?		
<input type="button" value="Search"/>		<input type="button" value="Clear Fields"/>	

- b. Enter in the Provider's name or search using a letter.
- c. Click the Search button. A list of matching Search results will appear at the top of the window.
- d. Click on the Provider from the list of results. The Agency Profile screen will refresh and display the Provider in the Referral Quicklist box.

9. **Child Providers:** This section is used to add an entity's programs or other related but separate services offered by the entity. The fields for a "Child Provider" are the same as a "Top-Level Provider."

The System will automatically assign the appropriate level to a new entity/provider. For more information on Parent/Child Providers, see the ServicePoint Help Menu. To add a Child Provider to the Agency:

- a. Click on the Add Child Provider button. The page will refresh and display the Add a New Provider Page.

- b. Fill in the Child Provider's information.
- c. Click on the Save Changes button. The page will refresh back to the Agency Profile Screen.
- d. The Child Provider and its Level are now listed in the Child Providers box.

10. Potential Exceptions: All client records should be set to “closed” to others within the BAS-Net system as a security precaution. However, you may choose to allow data sharing between agencies. To do this, you must indicate potential exceptions.

Use this section to create a list of potential exceptions to your default security settings. Decide which agencies you will grant security exceptions to and add them as potential exceptions. After these providers are entered, use the "Add As Open Exception" link to grant the desired exception.

As users enter client data, the security settings and exceptions will be applied as specified. Keep in mind, users can edit the security of individual answers - turning exceptions on or off - but only within the list of providers you have specified. To add a Potential Exception:

- a. Click on the Add Provider button. A list of Agencies currently in the system and the Agency search toolbar will pop up in a separate window.

Search Results ([refine your results or do a new search below](#))

Name	Info	Type	Phone	Location
Bowman Systems	show info	Level 1	(318) 213-8780	Shreveport, Louisiana 71101

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Enter Search Criteria

▶ [All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

Search Term:

City: State:

County/Parish: Area:

ZIP: Diagnostic/Service Code:

Type:

ServicePoint users only?

- b. Enter the Agency's information that you wish to add in the toolbar.
- c. Click on the Search button. A list of matching results will appear.
- d. Click on the Agency you wish to add as a Potential Exception. The Agency Profile screen will refresh, and this Agency will be listed in the Potential Exceptions box.
- e. Click on the Add as Open Exception link. Doing this will add the Agency to all Default Restrictions in the system.

11. Default Restrictions: These restrictions indicate how you want ServicePoint to handle security settings by default when you create new client records. Be sure to click "Closed" next to each ServicePoint feature to set its default security setting.

Default Restrictions and Exceptions		Show Default Exceptions
Action Step	<input type="radio"/> Open <input checked="" type="radio"/> Closed	
Additional Profile Information	<input type="radio"/> Open <input checked="" type="radio"/> Closed	
Case Note	<input type="radio"/> Open <input checked="" type="radio"/> Closed	

12. Assessment Administration: Use this section to indicate which assessments will be visible to your users and the appropriate ordering. You may specify each of the following areas. Be sure to save your changes.

Assessment Administration						
Order	Name	Visible	Default	Show On Profile	Show On Entry	Show On Exit
1	Additional Profile Information	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	HLD 40118	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
3	PATH	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Childhood Immunization	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Children	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Client Budget and Expenses	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Diagnosis	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Education	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Employment	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	History	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	Insurance Information	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	Legal	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Order: Change the number next to the assessment's name to reorganize the order in which they appear.
- Visible: Check this box next to the assessment if you would like this Provider's users to be able to view the assessment.
- Default: Click the button next to the assessment you wish to appear on the screen when the user goes to the Assessment screen.
- Show on Profile: Click the button next to the assessment you wish to appear on the Client Profile screen.
- Show on Entry: Click the button to select the assessments to appear on the client's Entry screen.
- Show on Exit: Click the button to select the assessment to appear on the client's Exit screen.

Adding and Editing Users

Every individual that uses the ServicePoint system is assigned a specific User Access level which determines the information that they can access. Administrators can add users to BAS-Net and assign their User Access Levels.

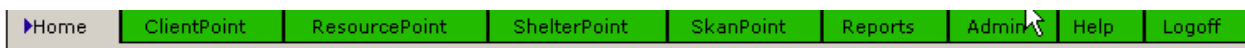
The following is the User Access levels available in the system:

Resource Specialist I	Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules and screens is not given. A resource specialist cannot modify or delete data.
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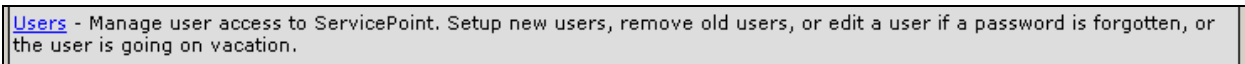
Resource Specialist II	Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules and screens is not given. A Resource Specialist II is an agency-level "Information & Referral (I&R) Specialist" who may update their own agency and program information.
Resource Specialist III	Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules is not given. A Resource Specialist III may edit the system-wide news feature of BAS-Net.
Volunteer	Under this access level, a user may access ResourcePoint, and have limited access to ClientPoint, and to service records. A volunteer may view or edit basic demographic information about clients (the profile screen), but is restricted from all other screens in ClientPoint. A volunteer may also enter new clients, make referrals, or check-in/out a client from a shelter. A volunteer does not have access to the "Services Provided" tab in BAS-Net. Normally, this access level is designed to allow a volunteer to perform basic intake steps with a new client and then refer the client to an agency staff or case manager.
Agency Staff	Under this access level, a user may access ResourcePoint, and have full access to service records, but only limited access to ClientPoint. Agency staff may access most functions in ServicePoint, however, they may only access basic demographic data on clients (profile screen). All other screens are restricted including Reports. Agency Staff can add news items to the newswire feature of ServicePoint.
Case Manager I	Under this access level, a user may access all BAS-Net screens and modules except "Administration." A Case Manager I may access all screens within ClientPoint except, for confidentiality reasons, the medical screen. They also may access Reports.
Case Manager II	Under this access level, a user may access all BAS-Net screens and modules except "Administration." A Case Manager II may access all screens within ClientPoint, including the medical screen and Reports.
Agency Administrator	Under this access level, a user may access all ServicePoint screens and modules. This level may add/remove users and edit agency and program data for his/her agency.
Executive Director	Same access rights as Agency Administrator, but ranked above Agency Administrator.

System Operator	Under this access level, a user may just access "Administration." The system operator can setup new agencies, add new users, reset passwords, and access other system-level options. The system operator may order additional user licenses and modify the allocation of licenses. They maintain the system, but may not access any client or service records.
System Administrator I	Same access rights to client information as Agency Administrator, but not for all agencies in system. Full access to administrative functions.
System Administrator II	No restrictions. Full access to BAS-Net.

To Create a New User:



1. Click Admin on the navigation bar. The page will refresh and display a list of Administration options.



2. Click on the Users link from the administration screen. The page will refresh with a list of ServicePoint users.

ServicePoint Users					Add New User
Name	Username	Provider	Status	Access Level	
BIS Support	support	Bowman Systems	Active	System Administrator II	
Debbie LaBounty	dlabounty	Cornerstone Manor	Active	Agency Administrator	
Diane Matteson	matteson	Cornerstone Manor	Active	Agency Administrator	

3. Click on the Add New User button at the top right hand corner of the screen. The page will refresh and display the Add New User screen.
4. Enter the following information.
 - o Name: Enter the First and Last name of the user in the Name textbox.
 - o Provider: Click on the Provider Search button to select the Provider associated with this User. A list of Providers and the Enter Search Criteria box will pop up in a new window.
 - o Login: Enter a unique login name for this user. Login IDs must be unique. If the login ID assigned is in use, the system will indicate this.

- Password: ServicePoint randomly assigns you a temporary password. You will need to provide this password to the user. During their first login, s/he will choose a password to replace this generated password.
- Access Level: Choose an access level for this user from the Access Level picklist. See Access Levels chart for a description of each level.
- User Expiration: This field is optional. If this user needs temporary access to the system, enter an expiration date. Automatic deactivation of the account will occur on that date. The date must be entered in MM/DD/YYYY format.
- State: Select either Active or Inactive. Inactive accounts cannot login to the system. If a user has four consecutive bad logon attempts, the system will automatically mark the account inactive. If a user reports not being able to log on, administrators should look here first.
- Code Sets Allowed: Select the code sets this user can access.
- Special Permissions:
 - Allow User to Back-date Releases of Information: This option gives the user permission to add or change the date of the Release of Information to a date prior to today's date. This allows for the entry of a date into ServicePoint that matches the date on a signed Release of Information obtained earlier.
 - Allow User to Change the Security of Their Clients' Assessments: This option gives the user permission to change the security settings for individual assessments.
 - Allows User to Use the SkanPoint Module: This option turns on the SkanPoint tab and its corresponding sections for the user .

Add new User Save Changes | Exit

Name

Provider Please click the button to the right to select a provider Provider Search

Login

Password 030c11f5 Generate New Password

Access Level Resource Specialist I ▼

User Expiration (Specify a date, IE: 12/1/2002)

Status Active Inactive

Code Sets

- AIRS Taxonomy
- ICD-9
- CPT
- DSM-IV-TR

Special Permissions

- Allow User to Back-date Releases of Information
- Allow User to Change the Security of their Clients' Assessments
- Allow User to Use The SkanPoint Module

Add new User Save Changes | Exit

- Click on the Save Changes button to create the user. The page will refresh and the Providers this user may enter data as box will appear at the bottom of the "Add New User" screen.

Edit or Change a User's password

- Click on the Admin tab on the navigation bar.
- Click on the Users link from the Administration screen. The page will refresh and display a list of Users.
- To locate a User, enter user's name or login name as the Keyword and click on the Search button. You can also search by Provider name.

Search for a user

Keyword:

Provider:

- Find the User account in the user list and click on the user's name. You may change any of the information shown except for provider.

ServicePoint Users

Name	Username	Provider	Status	Access Level
Betty Rubble	brubble	Homeless Alliance of Western New York	Active	Case Manager II

showing 1 - 1 of 1

Search for a user

Keyword:

Provider:

- To reset a user's password, click Generate New Password. Be sure to write down the user's new password. The next time they logon, they enter their own unique password.

Users ID: 12

Name:

Provider: [Homeless Alliance of Western New York \(Level 1 \)](#)

Login:

New Password: 4dd58eec

Access Level: ▼

User Expiration: (Specify a date, IE: 12/1/2002)

Status: Active Inactive

Code Sets:

- AIRS Taxonomy
- ICD-9
- CPT
- DSM-IV-TR

6. Click on the Save Changes button.

Adding and Editing Agency News

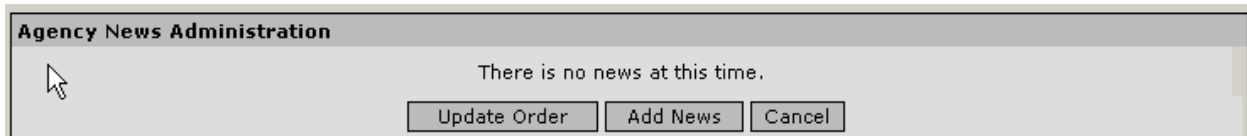
NewsFlash – Agency allows users to users (except those with Volunteer or Resource Specialist I designations) to post and edit news items for his/her Provider only. No other Provider will see these items.

Locating Agency NewsFlash:

- Click on the Update News link, located in the bottom, right hand corner of the NewsFlash- Agency box on the Home Page, or click on the Admin tab, then click on the Agency News Administration link.

[Agency News Administration](#) - Post and edit news items that are for your provider only – only your provider will see these items.

- The page will refresh and display the Agency News Administration screen.

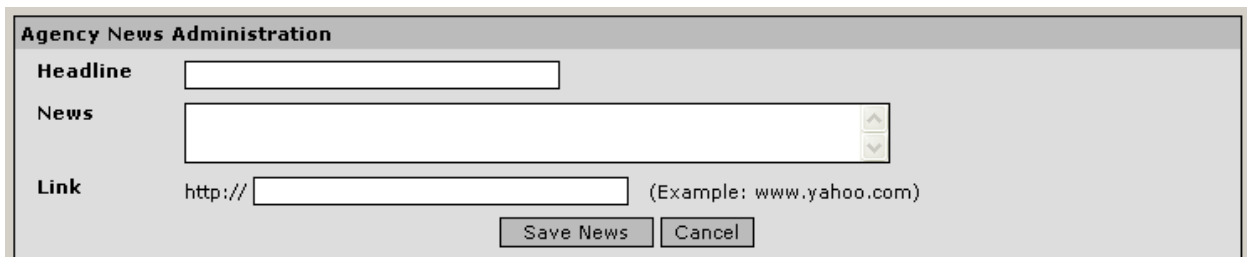


Agency News Administration

There is no news at this time.

Add Agency News:

- Click on the Add News button on the Agency News Administration screen. The page will refresh and display Agency News fields.



Agency News Administration

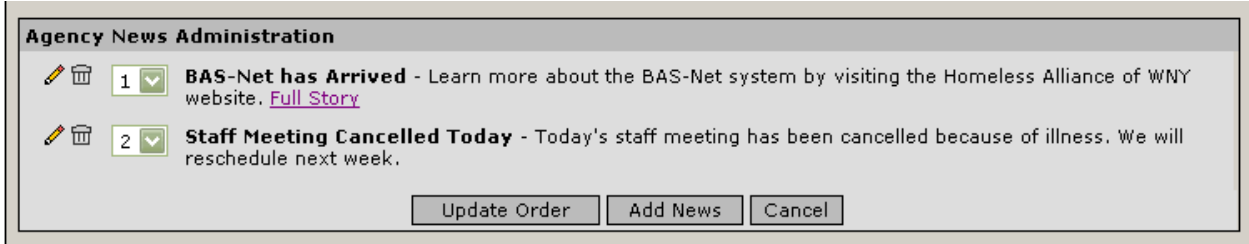
Headline

News

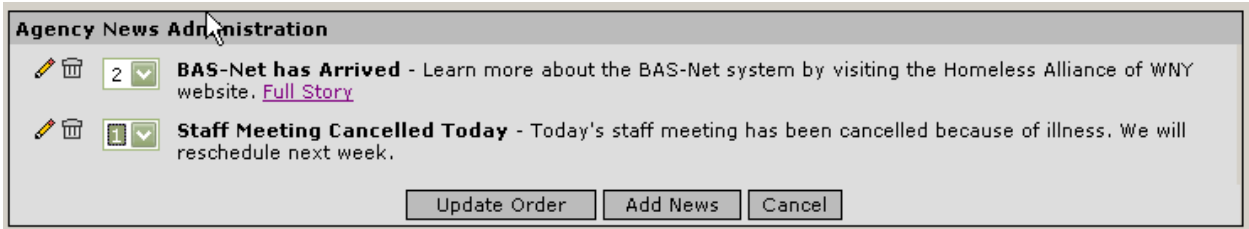
Link http:// (Example: www.yahoo.com)

- Enter the Subject of the News in the Headline textbox. This is the text that will appear in bold above the actual news.
- Enter the news in the News textbox.
- If the news is associated with a link, then enter the URL in the Link field.
- Click on the Save News button. The page will refresh and the News will be listed

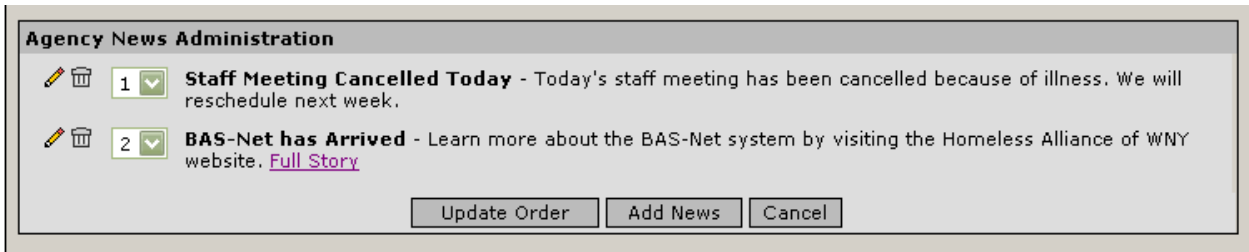
To Change News Order:



- Change the number next to the item.



- When you have completed adjusting the Order of the News items, click on the Update Order button. The page will refresh, and the items will be listed in the order you chose.

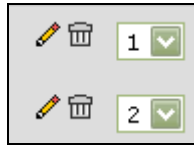


Edit Agency News:



- On the Agency News Administration screen, click on the Edit Icon (pencil) next to the News item you wish to edit. The screen will refresh and display the content of the News item.
- Make your changes and click on the Save News button.
- The page will refresh back to the main Agency News Administration page, and the changes will be reflected on the ServicePoint Home page.

Delete Agency News:



- On the Agency News Administration screen, click on the Delete icon (trash can) next to the News item you wish to delete.
- A warning window will appear that says: "Are you sure you want to delete this news item"
- Click on the OK button to delete the item.
- The page will refresh and this item will no longer be listed or appear on the ServicePoint Home page.



Notes