

ServicePoint 3.09 Release Notes

1. Question in an assessment can now be flagged as required.
 - a. This feature allows me to make a field mandatory in HMIS. I can do this to any HMIS question. If this is turned on for a question then when the user takes an assessment the system will prompt for the required field before the assessment can be saved.
 - b. Currently we have not made any fields mandatory. Should we want to make a question answer mandatory we risk not getting the assessment at all because if the user cannot answer the question they will have no choice but to enter an incorrect answer or skip the assessment entirely.
2. Sub-Assessment Refreshing.
 - a. In version 3.08 when a user completed a sub-assessment the screen refreshed to the top of the main assessment. In version 3.09 when a sub-assessment is saved the screen will refresh back to the sub-assessment area of the main assessment.
3. Service Transaction Changes.
 - a. Cascade Delete
When a client's need is deleted the system will now delete all services attached to the deleted need.
 - b. Mass Referral
The user now has the ability to make referrals to multiple providers using one screen.
 - c. Client Zip Code Search on mass referral screen
By adding a "Client Zip Code" field to an assessment users can now do a referral provider search based on the client's zip code.
 - d. Overall Need Status is now defaulted to "Identified".
 - e. Altered Service Transaction Links
The pencil icon next to referrals linked to Outstanding Referrals, this has been changed and now links to Referral Data Pop-up window. The cancel referral link now links to the services provided pop up window.
 - f. Referral Follow Up Options
Users can set a follow Up for a new or existing referral
4. Added fields to the Services table for Custom Reporting
The services table now allows us to report on the Referral Follow Up Date, Referral Follow up Made, and Referral Projected Follow Up Date.
5. Resource Point Link (Orange button)
A orange button has been added to allow the user to quickly go to the referral module of Servicepoint.
6. Save button on client profile screen
An additional save button has been added to the client profile screen.
7. Quick Call feature can now be turned on or off for a specific user.
8. Dropped Quick call Warning message.
To speed up quick call processing the quick call warning message has been dropped.