

Backdate Mode (v.2)

The most efficient way to enter client data is on a daily basis but at times, it may be necessary for the user to enter client data from a previous date. For example, an agency may use paper questionnaires and choose to enter assessment information into ServicePointi at the end of the week. In these situations, the user will need to use **Backdate Mode**. Follow the steps below to 'Backdate' your client entries.

1. Click on the CLIENTPOINT tab.
2. Enter the clients name and SSN in the *Search for Existing Client* section and click on the **Search for Client** button.
3. If no match is found . click on the **Add Client With This Information** button.
4. The *Client Profile* section is now displayed, select the proper response for %SSN Data Quality+ from the drop down list and click **Save Changes**.
5. In the %Assessment Date” field, enter the date on which the assessment was made. This date should be entered in MM/DD/YYYY format. Click on the **Back Date** button. By default, the assessment time will be set to 12:01 AM.
 - a. The date must be entered before clicking the Back Date button. If the current date is in the date field the **Backdate Mode function will not be activated**.
6. A warning message will appear: "Back-date Mode allows you to enter historic assessment information for a client. Are you sure you want to switch to Back-date Mode?" Click on the **OK** button to go into **Backdate Mode**.
7. The screen will refresh and display yellow bars at the top and bottom of the assessment as well as the date you entered. These elements remind you that you are in **Backdate Mode**.



The screenshot shows a yellow header bar with the text "Mental Health Assessment" and icons for printing and saving. To the right, it says "(Backdate Mode) Return to Live Mode" and has "Save Changes" and "Exit" buttons. Below the header, the "Assessment Date" is displayed as "10/19/2004 12:01 AM" with a "Back Date" button.

8. Complete the additional profile information.
9. Click on the **Save Changes**.
10. Click on the *Assessments* tab to complete the proper assessment for your client (CoC, ESG, or PATH).
 - a. **Backdate Mode** will remain active within the *Assessments* and *Client Profile*.
11. The user may stay in **Backdate Mode** and enter multiple client intakes in one session. As long as the yellow bar is displayed above the Assessment Date, **Backdate Mode is still active**.
12. **Households, Entries, Services, ROIs, and Case Plans, all need to be back dated by the user. Backdate Mode does not translate these items so the user will need to remember to enter the correct date in each section.**
13. When finished entering and saving all backdated information, click on the **Return to Live Mode** link.
14. The following warning message appears: "Are you sure you want to return to live mode?"
15. Click on the **OK** button to return to **Live Mode**.
16. The page will refresh and the yellow coloring will disappear. ServicePointi will be back in **Live Mode**.