SHELTERPOINT WORKFLOW
EXTENDED STAY WITH BED RESERVATIONS (EMERGENCY HOUSING)

Data entry instructions for Harbor Light Center's Emergency Housing programs.

TABLE OF CONTENTS

Institute for Community Alliances

BEFORE CHECK-IN TIME FOR NEW & RETURNING SHELTER GUESTS

Check for system alerts and access your ShelterPoint unit list.

1. Login to **ServicePoint**.

2. Check the **System News** section on your Home Page Dashboard for announcements about system downtime, new data standards, and other important updates.

System News (3)		Agency News (0)
Date	**Headline**	
08/29/2018	Searching for the perfect report? Click here!	
04/18/2018	Reminder: Check the "Last Warehouse Build" in ART before scheduling reports!	
06/01/2016	Email us with your data entry and reporting questions! mnhmis@icalliances.org	

3. Click on **Enter Data As** and select the correct shelter provider from the pop-up menu.

4. Select **ShelterPoint** from the navigation menu on the left side of the screen.

5. Select the **View All** option from the ShelterPoint Dashboard.

    a. If the **ShelterPoint Dashboard** does not appear automatically, select the correct unit list from the **Unit List** drop-down menu and click on **Submit**.

AT CHECK-IN TIME FOR NEW & RETURNING SHELTER GUESTS

Follow these steps for each client with a reservation from the Adult Shelter Connect or for a new payment period.

1. Find the client's name in the **Reservations for Unit List** table and select **Cancel Reservation**.

List - Higher Ground Floor 1 Shelter			
Name	**Date of Birth**	**Gender**	
(138) The Grey, Gandalf	11/21/1937		Cancel Reservation
(118) Baggins, Bilbo	11/21/1937	Male	Cancel Reservation
Showing 1-2 of 2			

    a. If the client does not have a reservation, then they are unable to stay at the shelter. Direct them to visit the Adult Shelter Connect to make a reservation.

2. Choose **Hennepin ASC – Checked In** for the reason the need was not met, then click on **Save**.

3. Select a bed for the client and click on the word "**EMPTY**".

4. Scan the client's **Community Card.**

   a. If the client does not have their Community Card, ask them for another form of identification, so that you can verify the spelling of their name and date of birth. Use that information to search for the client's record in HMIS.

   b. If you know the client's ID number, they can be checked-in using that as well.

5. Read any pop-up alerts to determine whether any action needs to be taken. (For example, the client might have an active ban incident for your shelter.)
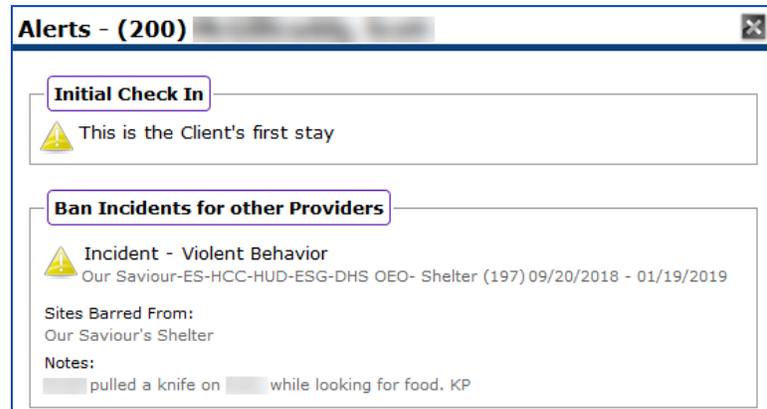
   a. If there is a pop-up alert, decide whether to **continue** with the check-in or **cancel** it.

6. Enter the appropriate code into the **Codes/Notes** text box:

   a. SSN

   b. SN

   c. SD

   d. ED

   e. V#/MO#

7. Review the **ASC ES Cost_HUD ESG All-Inclusive A** assessment and update any fields that are missing information.

   a. If necessary, add a new row to the **Payment Information** sub-assessment. Do not enter a date in the **Voucher or Payment Period End Date** field.

8. When you are done updating the assessment, click on **Save & Exit**.

9. Continue on to the next client.

AT CURFEW

Check out any clients who did not return to the shelter by curfew.

1. Open the correct unit list in **ShelterPoint**.

2. Find the name of the client and click on the **red circle** next to the **Date In**.

	Date In	Floor	Room	Bed	Hold	Client
🔴	05/29/2019	Second Floor Men's Emergency Housing	203	01 Medical 01		(321) Doe, Shaw
⬆🔴	05/29/2019	Second Floor Men's Emergency Housing	203	02 Respite 01		(231) Goodwin, j

3. Pick the most accurate answers from the **Reason for Leaving** and **Destination** drop-down menus.

4. Scroll down and click on **Add New Incident**.

5. In the pop-up, enter today's date in the **Start Date** field and select one of the following options from the **Incident** drop-down menu:

    a. AWOL – No Call No Show

    b. AWOL – Cancellation

    c. Hospital

6. Click on **Save** to close the **Incident** pop-up.

7. Review the **ASC ES Cost_Exit HUD** assessment and make updates where necessary.

8. Find the **Payment Information** sub-assessment and click on the **edit pencil** in the most recent voucher row. (This row should not have a **Voucher or Payment Period End Date**.)

🔍 **Payment Information**

	Voucher or Payment Period Start Date	Voucher or Payment Period End Date	Payment made by Client?	Method of Payment
✏🗑	10/15/2018		Yes	Money Order
✏🗑	09/15/2018	10/14/2018	Yes	Money Order

9. Enter an **End Date** into the empty field. This date should be the morning after the client last slept in their bed, so if May 5th was the last night they slept at the shelter, May 6th would be the End Date.

10. Click on **Save** to close the **Payment Information** pop-up, then select **Save & Exit** at the bottom of the screen to return to the unit list.

OVERNIGHT / IN THE MORNING

Check out any clients who will be moving out of the shelter and hold beds for clients who will be entering a new payment period. You can also print a unit list for your reference.

CLIENTS MOVING OUT OF SHELTER

1. Open the correct unit list in **ShelterPoint**.

2. Find the name of the client and click on the **red circle** next to the **Date In**.

3. Set the **Date Out** as the morning they are leaving shelter.

4. Pick the most accurate answers from the **Reason for Leaving** and **Destination** drop-down menus.

5. Review the **ASC ES Cost_Exit HUD** assessment and make updates where necessary.

6. Find the **Payment Information** sub-assessment and click on the **edit pencil** in the most recent voucher row. (This row should not have a **Voucher or Payment Period End Date**.)

7. Enter an **End Date** into the empty field. This date should be the morning after the client last slept in their bed, so if May 5th was the last night they slept at the shelter, May 6th would be the End Date.

8. Click on **Save** to close the **Payment Information** pop-up, then select **Save & Exit** at the bottom of the screen to return to the unit list.

CLIENTS ENTERING A NEW PAYMENT PERIOD

1. Open the correct unit list in **ShelterPoint**.

2. Find the name of the client and click on the **red circle** next to the **Date In**.

Date In	Floor	Room	Bed	Hold	Client
05/29/2019	Second Floor Men's Emergency Housing	203	01 Medical 01		(321) Doe, Shawl
05/29/2019	Second Floor Men's Emergency Housing	203	02 Respite 01		(231) Goodwin, j(
	Second Floor				

3. Set the **Date Out** as the morning they are leaving shelter.

4. Pick the most accurate answers from the **Reason for Leaving** and **Destination** drop-down menus.

5. Review the **ASC ES Cost_Exit HUD** assessment and make updates where necessary.

6. Find the **Payment Information** sub-assessment and click on the **edit pencil** in the most recent voucher row. (This row should not have a **Voucher or Payment Period End Date**.)

Payment Information

		Voucher or Payment Period Start Date	Voucher or Payment Period End Date	Payment made by Client?	Method of Payment
✏️	🗑️	10/15/2018		Yes	Money Order
✏️	🗑️	09/15/2018	10/14/2018	Yes	Money Order

Add   Showing 1-2 of 2

7. Enter an **End Date** into the empty field. This date should be the morning after the client last slept in their bed, so if May 5th was their last night at the shelter, May 6th would be the End Date.

8. Click on **Save** to close the **Payment Information** pop-up, then select **Save & Exit** at the bottom of the screen to return to the unit list.

9. Scroll down to the **Reservations for Unit List** section and click on **Add Reservation**.

    a. Scan the client's **Community Card** or enter their **Client ID** number and click on **Submit**.

    b. Verify that the **Reservation Date** is correct:

        i. If the reservation is being made in the morning, this should be today's date because the client is returning tonight.

        ii. If the reservation is being made at night and the client has already checked-in, this should be tomorrow's date.

    c. Click on **Save**.

10. If the client's bed is now empty, find it in the Unit List and click on the word "**Hold**".

PRINT OUT A UNIT LIST

1. Open the correct unit list in **ShelterPoint**.

2. Select **Print Unit List**. When prompted, check the box to **Include Codes/Notes**, then click on **Print**.

    a. Depending on your printer's setup, you may need to click through additional prompts to finish printing the unit list.

APPENDIX A: POP-UP ALERTS

When a client is checked into a bed, a pop-up alert may appear. It is important to review these alerts because they may contain information that impacts the client's stay.
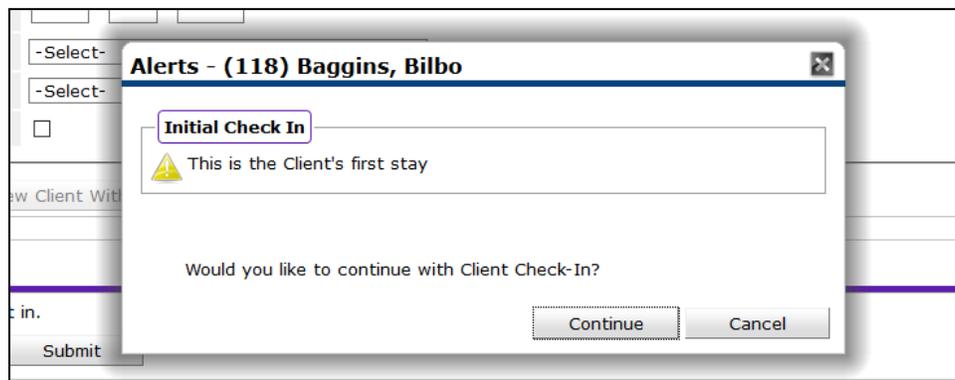
INITIAL CHECK-IN

What does this mean?

This is the first time a particular client record has been checked into your shelter's unit list. Since individuals may have many client records, this does not mean the client has never stayed at your shelter before.

What do you need to do?

Complete your shelter's intake process with the client; this can happen after the initial rush of check-in, but ideally before the individual leaves the next morning. One key part of intake is completing entry assessment required by your funder, which is often the *ESG All-Inclusive A* assessment.

TIME BETWEEN STAYS

What does it mean?

The client record has not been checked into your bed list within the last 14 days.

What do you need to do?

Complete your shelter's intake process with the client; this can happen after the initial rush of check-in, but ideally before the individual leaves the next morning. Since the client has stayed at your shelter in the past, you will be updating their existing assessment information.

INCIDENTS

When should you create an incident?

Incidents are used to document either a negative situation involving a client or the reason why a client did not claim their bed by curfew. If you would like to document something that does not fall into those two categories, add a note to the **Client Notes** section on the **Client Profile** tab.

		Provider	Note Date	Note Preview	Full Note
Client Notes					
✏️	🗑️	Our Saviour-ES-HCC-HUD-ESG-DHS OEO- Shelter	12/05/2018	Client obtained employment.	📖
Add New Client Note		Print	Showing 1-1 of 1		

When should an incident include a "ban"?

To determine whether an incident qualifies as a "ban" event, consider the following:

1. If you create the ban, the client will not be able to check into your shelter.

2. Is the client restricted or trespassed from your shelter? This requires a ban in the incident.

3. Are you trying to document a situation where a client was disrespectful or violated a rule, but you do not want to kick them out of the shelter? In this case, <u>do not</u> include a ban in the incident.

INCIDENT ALERT: BAN INCIDENTS FOR CHECK IN PROVIDER

What does it mean?

The client has been banned from staying at your shelter, either temporarily or indefinitely.

What do you need to do?

Check the pop-up to confirm which shelter the client is banned from and to see notes about the incident. Explain to the client why they are not allowed to stay at the shelter and follow any of your agency's protocols involving banned clients.

Rare Occasions

1. Shelter Staff: If the incident does not appear to be accurate or you have reason to believe the ban should be be lifted, contact your shelter manager.

2. Shelter Managers: If you need to remove a ban from an incident, follow the instructions below:

   a. Select **ClientPoint** from the navigation menu.

   b. Ask the client to scan their **Community Card**.

   c. Locate the **Incidents** section at the bottom of the **Summary** tab.

   d. Click on the **edit pencil** next to the incident that you would like to update.

   e. Change the **Ban** answer from **Yes** to **No**, then click on **Save**.

INCIDENT ALERT: BAN INCIDENTS FOR OTHER PROVIDERS

What does it mean?

The client has been banned from staying at another agency's shelter or a different shelter within your own agency. However, they can still be checked into a bed at your shelter.

What do you need to do?

Since only a single HMIS provider can be attached to a ban incident, you will want to read the pop-up alert carefully to make sure that the client was not barred from staying at your shelter as well.

1. If the incident does not involve your provider, select **Continue** and proceed with check-in.

2. If the incident <u>does</u> involve your provider, cancel the check-in process. Explain to the client why they are not allowed to stay at the shelter and follow any of your agency's protocols involving banned clients.

INCIDENT ALERT: INCIDENTS FOR CHECK IN PROVIDER

What does it mean?

A staff person at your shelter documented an incident involving the client and the incident's end date has not yet been reached.

What do you need to do?

This incident is only meant to provide you with information: there is no action you need to take. After reviewing the incident, click on **Continue** and proceed with check-in.

INCIDENT ALERT: INCIDENTS FOR OTHER PROVIDERS

What does it mean?

A staff person at another shelter documented an incident involving the client and the incident's end date has not yet been reached.

What do you need to do?

This incident is only meant to provide you with information: there is no action you need to take. After reviewing the incident, click on **Continue** and proceed with check-in.

CREATE AN INCIDENT

Follow the instructions below to create a new incident. You should never edit another provider's incident or delete an incident unless it was created in the wrong client's record.

1. Open the correct unit list in **ShelterPoint**.

2. Find the client's name in the unit list and click on it.

3. Select **Add New Incident**, then fill out the following fields:

    a. **Provider**: Select your shelter provider.

b. **Start Date**: Enter today's date.

c. **End Date**: If this is not a ban incident, enter today's date; if it is a ban incident, enter the date they are allowed back in the shelter <u>minus</u> one day.

d. **Incident**: Choose the most accurate option.

e. **Ban**: Select Yes or No. (Click here to review the criteria for creating ban incidents.)

f. **Staff Person**: Enter your name.

g. **Sites Barred From**: If this is a ban incident, type the full name of your shelter.

h. **Notes**: Explain what happened. Add your initials at the end.

4. When all fields have been filled out, click on **Save**.

This sample ban incident will prevent client 118 from checking into provider 1410's shelter from 12/05/2018 to 01/04/2019.