

SHELTERPOINT WORKFLOW

EXTENDED STAY WITH BED RESERVATIONS

(PAY FOR STAY)

Instructions for checking single adults into and out of beds at extended stay “pay for stay” shelters in Hennepin County.

TABLE OF CONTENTS

Before Doors Open for the Night.....	2
After Doors Open for the Night	2
End of Check-In Time	4
At Curfew	4
In the Morning	5
Appendix A: Pop-Up Alerts	5
Appendix B: Process a Client’s Payment.....	9

BEFORE DOORS OPEN FOR THE NIGHT

Prepare for the night by checking for system alerts and printing a copy of your 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**.
6. 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.

AFTER DOORS OPEN FOR THE NIGHT

Follow these steps for each client that comes to check into a bed.

1. Look for the client's name on the **unit list** that you printed.
2. Follow the proper set of instructions below, depending on whether the client appears on the list.

CLIENT APPEARS ON THE UNIT LIST

1. Check the client's name off on the unit list.
2. Remind the client which bed they will be staying in.
 - a. If the client is required to make a payment, work with them to get that payment processed at this time. Refer to **Appendix B: Process a Client's Payment** for instructions on recording a payment in HMIS.
3. Continue on to the next client.

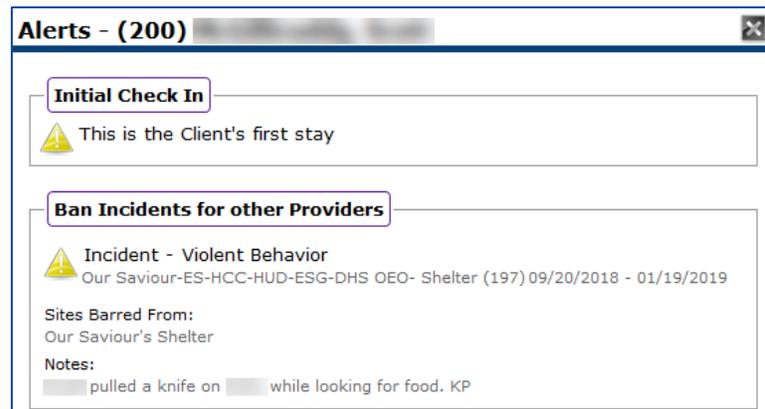
CLIENT DOES NOT APPEAR ON THE UNIT LIST

1. Find client’s name in the **Reservations for Unit List** table and select **Cancel Reservation**.
 - a. If the client does not have a reservation, direct them to visit the Adult Shelter Connect. If the ASC is closed, the client can contact 2-1-1 to make a reservation.

Reservations for Unit List - Higher Ground Floor 1 Shelter				
Arrival Date	Name	Date of Birth	Gender	
12/07/2018	(138) The Grey, Gandalf	11/21/1937	Male	Cancel Reservation
12/07/2018	(118) Baggins, Bilbo	11/21/1937	Male	Cancel Reservation

Reservation Showing 1-2 of 2

2. Choose **Hennepin ASC – Checked In** for the reason the need was not met, then click on **Save**.
3. Find the bed you chose 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. You will use this 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. Process the client’s initial payment. Refer to **Appendix B: Process a Client’s Payment** for instructions on recording a payment in HMIS.
7. Continue on to the next client.

END OF CHECK-IN TIME

Once all clients with reservations have checked-in, any unfulfilled reservations should be cancelled.

1. Open your shelter’s unit list in [ShelterPoint](#).
2. Scroll down to the [Reservations for Unit List](#) section.
3. For each client that did not claim their reservation, click on [Cancel Reservation](#), then select [No Show](#) and click on [Save](#).

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 their [Date In](#).

Date In	Program	Room	Bed	Hold	Client
08/02/2018	Men's Section	Room 112	112 1 Bottom		(460) Jim Bob, Jane
08/02/2018	Men's Section	Room 112	112 1 Top		(133) Car, Fast
11/20/2018	Men's Section	Room 112	112 2 Bottom		(254) Harry, Dave

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, then select [Save & Exit](#) to return to the unit list screen.
7. Scroll down to the [Reservations for Unit List](#) section and click on [Add Reservation](#).
 - a. Enter their [Client ID](#) number and click on [Submit](#).
 - b. Set the [Reservation Date](#) to match the date the client’s payment expires.
 - c. Click on [Save](#).
8. Find the bed they have been staying in and click on the word [“Hold”](#).

IN THE MORNING

Check out any clients who will be moving out of the shelter and hold beds for clients who will be transferring from one payment to another.

CLIENTS MOVING OUT OF SHELTER

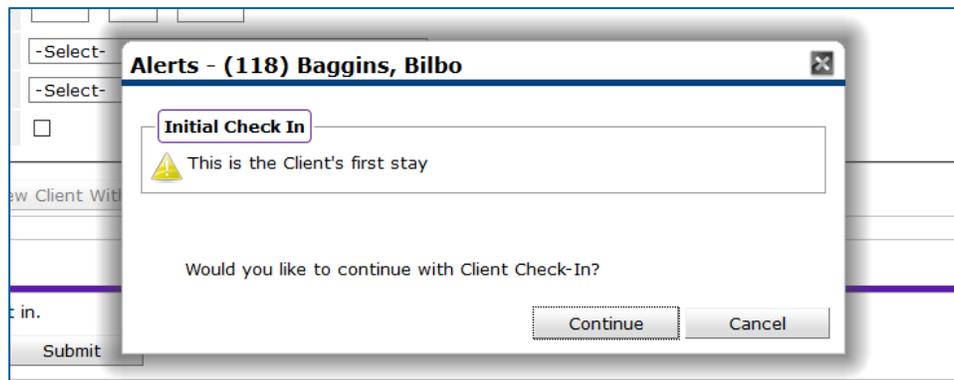
1. Open the correct unit list in **ShelterPoint**.
2. Find the name of the client and click on the **red circle** next to the **Date In**.

	Date In	Program	Room	Bed	Hold	Client
	08/02/2018	Men's Section	Room 112	112 1 Bottom		(460) Jim Bob, Jane
	08/02/2018	Men's Section	Room 112	112 1 Top		(133) Car, Fast
	11/28/2018	Men's Section	Room 112	112 2 Bottom		(254) Henry, Dave

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. Scroll down and click **Save & Exit**.

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.

Client Notes				
	Provider	Note Date	Note Preview	Full Note
	 Our Saviour-ES-HCC-HUD-ESG-DHS OEO- Shelter	12/05/2018	Client obtained employment.	
<input type="button" value="Add New Client Note"/> <input type="button" value="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, do not 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 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 does 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**. ([Can't remember how? Click here!](#))
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 minus 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**.

Add a New Incident - (118) Baggins, Bilbo

Provider *	ICA-ES-HCC-DHS-OEO ESP- Training Provider (1410)	Search	My Provider	Clear
Start Date *	12 / 05 / 2018			
End Date	01 / 04 / 2019			
Incident	Nonviolent Criminal activity			
Incident Code	-Select-			
Ban	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Staff Person	Thorin Oakenshield			
Sites Barred From	ICA emergency shelter			
Notes	Banned from the shelter for one month following a theft.			

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

APPENDIX B: PROCESS A CLIENT’S PAYMENT

Follow the instructions below when a client makes an initial payment or pays to extend their stay in shelter.

1. Accept the client’s payment.
2. Fill out a receipt and hand it to the client.
3. Find the client’s name in the unit list and click on it to open the **Unit Stay Entry Data** pop-up.

Unit List - Higher Ground Pay for Stay								
						Display	Sort By	
						All Beds	Progr	
Date In	Program	Floor	Bed	Hold	Client	Date of Birth	Gen	
05/06/2019	Higher Ground Pay for Stay	2nd Floor	Bed 001 Bottom		(551) Baggins, Bilbo	11/18/1978	Male	
	Higher Ground		Bed 002		(554) Gamgee			

- a. If this is the client’s first payment, you may already be viewing the pop-up.
4. Scroll down to the **Payment Information** sub-assessment and click on **Add**.
5. Fill out the fields as completely as possible, then click on **Save**.
6. Select **Save & Exit** to return to the unit list screen.