SHELTERPOINT WORKFLOW
NIGHT-BY-NIGHT WITH BED RESERVATIONS

Instructions for checking single adults into and out of beds at night-by-night shelters in Hennepin County.

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Institute for Community Alliances

BEFORE DOORS OPEN FOR THE NIGHT

Prepare for the night by checking for system alerts and clearing held beds.

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.

6. Scroll down to the bottom of the screen and click on **Release All HELD Units**. When prompted, select **Yes** to set all HELD units to EMPTY.

AFTER DOORS OPEN FOR THE NIGHT

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

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.

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		

servations for Unit List - Higher Ground Floor 1 Shelter

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

3. Pick an open bed in the unit list 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 the client for an ID, such as a driver's license or state ID, to check the spelling of their name and date of birth.

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.)
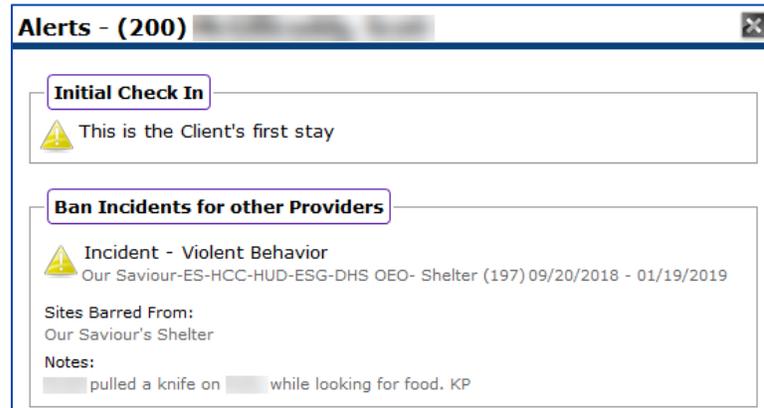
a. If there is a pop-up alert, decide whether to **continue** with the check-in or **cancel** it.

6. 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.

1. For each client that did not claim their reservation, click on **Cancel Reservation**, then select **No Show** and click on **Save**.

## AFTER CHECK-IN TIME: 2-1-1 REFERRALS

Follow these steps for each client that receives a referral for a bed from 2-1-1.

1. Open your shelter's unit list in **ShelterPoint**.

2. Ask the individual for their **Community Card**.

3. Add the client's name to the 2-1-1 referrals list. This is a handwritten list used to track which clients will need to visit the ASC or call 2-1-1 to make a reservation in the morning.

4. Move on to the correct set of instructions below, depending on whether the client has a **Community Card**.

CLIENT HAS A COMMUNITY CARD

1. Pick an open bed in the unit list for the client and click on the word "**EMPTY**".

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

3. 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.

   b. If the client is checking-in after midnight, click the **Midnight Check In** button.
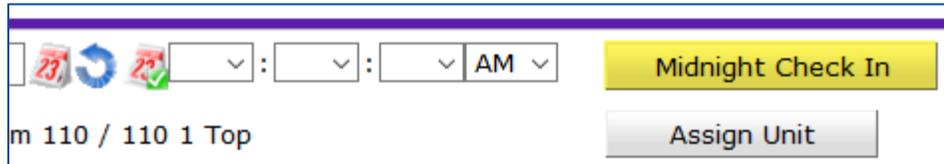
4. Scroll to the bottom and click **Save & Exit**.

5. Inform the client they will need to go to the Adult Shelter Connect in the morning if they would like to make a reservation for the next night.

CLIENT DOES NOT HAVE A COMMUNITY CARD

1. Ask the client for an ID, such as a driver's license or state ID, to check the spelling of their name and date of birth.

   a. If the client does not have an ID, they may provide you with their personally identifying information verbally.

2. Click on the word "**EMPTY**" in the row that contains the bed you choose for the client.

3. Type the client's information into the **Client Search** boxes, then click on **Search**.

   a. Repeat this step multiple times, using different combinations of information to search for the client. Because client records often have incomplete information, it may be necessary to search with only a few boxes filled out.


5. Move on to the correct set of instructions below, depending on whether a matching record appears for the client in the search results.

CLIENT HAS A 7-DIGIT HMIS RECORD

1. Verify that the name and date of birth match the identification provided by the client. If they do, click the **green plus sign** next to the client's name.

2. Read any pop-up alerts to determine whether any action needs to be taken (e.g. the client has a ban incident from your shelter).

   a. If it is after midnight, click on **Midnight Check In**.

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

4. Inform the client they will need to go to the Adult Shelter Connect in the morning if they would like to make a reservation for the next night.
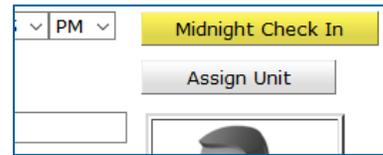
CLIENT DOES NOT HAVE A 7-DIGIT HMIS RECORD

If the client does not have an HMIS record, one will need to be created for them. The first step is to discuss the HMIS Release of Information with the client: The HMIS ROI asks whether the client will consent to share their information with other service providers. When an agency is able to access a client's shared information, the client is saved from having to answer the same questions over and over again.

1. If the client checks the **SHARE** box on the ROI:

   a. Type the client's information into the **Client Search** boxes. It is important to fill out these boxes as completely as possible.

   b. Type the word **SHARED** into the **Alias** field, since this client has agreed to statewide data sharing.

   c. Click on **Add New Client With This Information**, then select **Ok** in the confirmation pop-up to continue with creating the record.

   d. Select the client by clicking on the **green plus sign** next to their name in the **Client Results** section. When you are alerted that this is the client's initial check-in, click on **Continue**.
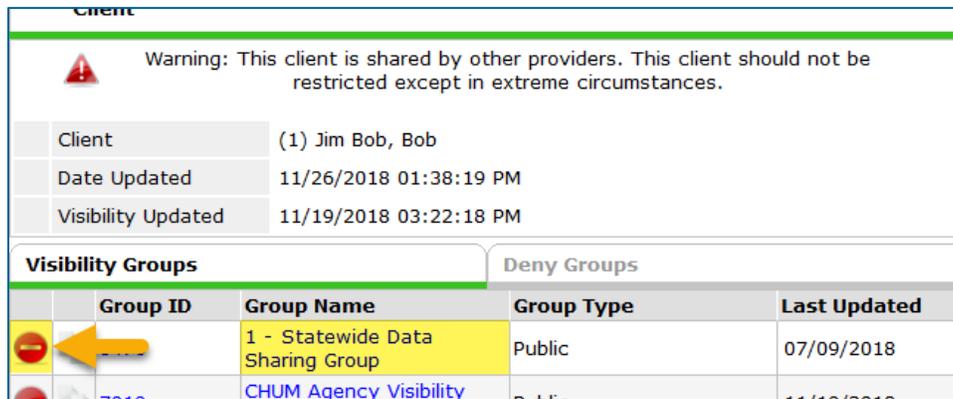
   e. On the next screen, fill out the **ASC NBN Universal profile** as completely as possible. When you are finished, click on **Save & Exit**.

   f. Inform the client they will need to go to the Adult Shelter Connect in the morning if they would like to make a reservation for the next night.

2. If the client checks the **DO NOT SHARE** box on the ROI:

   a. Inform the client that they will not be able to reserve shelter beds and instead will need to call 2-1-1 each night to find an available bed.

   b. Select **ClientPoint** from the navigation menu on the left side of the screen.

c. Type the client's information into the **Client Search** boxes. It is important to fill out these boxes as completely as possible.

d. Click on **Search**. Make sure that a record with matching information does not appear in the search results.

e. Click on **Add New Client With This Information**, then select **Ok** in the confirmation pop-up to continue with creating the record.

f. When prompted by the **Back Date Mode** pop-up, select **Use Current System Date**.

g. Make a note of the client's ID number.

h. Click on the **red lockbox** next to the **Mass Visibility Update** button.
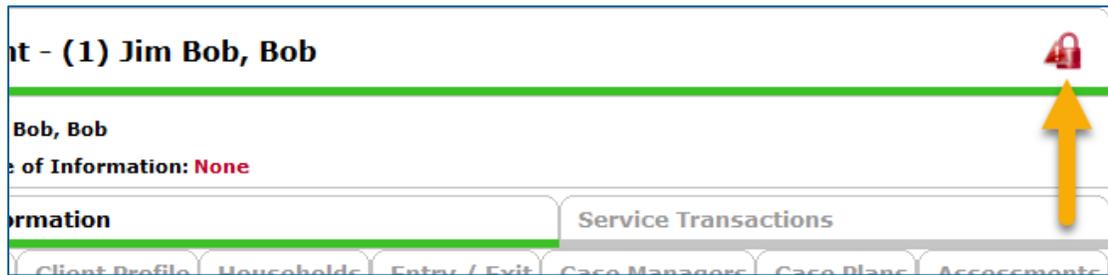
i. Select the **red circle with a minus sign** next to the group **1 – Statewide Data Sharing Group** to remove it from the list of visibility groups.

j. Click on **Exit** to close the pop-up.

3. Open your shelter's unit list in **ShelterPoint**.

a. Click on the word "**EMPTY**" in the row that contains the bed you choose for the client.

b. Enter the client's ID number and click on **Submit**. When you are alerted that this is the client's initial check-in, click on **Continue**.

     i. If it is after midnight, click on **Midnight Check In**.

c. Fill out the **ASC NBN Universal profile** as completely as possible. When you are finished, click on **Save & Exit**.

IN THE MORNING

Each day, the unit list should be cleared and reservations made for those who will be returning at night.

1. Open your shelter's unit list in **ShelterPoint**.

2. Scroll down to the bottom of the screen and click on **Transmit Today's Check Out List**.

3. Select **Check Out**.

4. As each client leaves, ask if they will be staying again tonight. If they say yes, follow these steps to create a reservation for them:

    a. Check the 2-1-1 referrals list for the client's name. If they are on the list, inform the client that they must visit the ASC to get a reservation for the night, then skip steps b. – f.

    b. Click on **Add Reservation**.

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

    d. Verify that the **Reservation Date** is correct. It should be today's date.

    e. Click on **Save**.

    f. Find any empty bed and click on the word "**Hold**".

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.
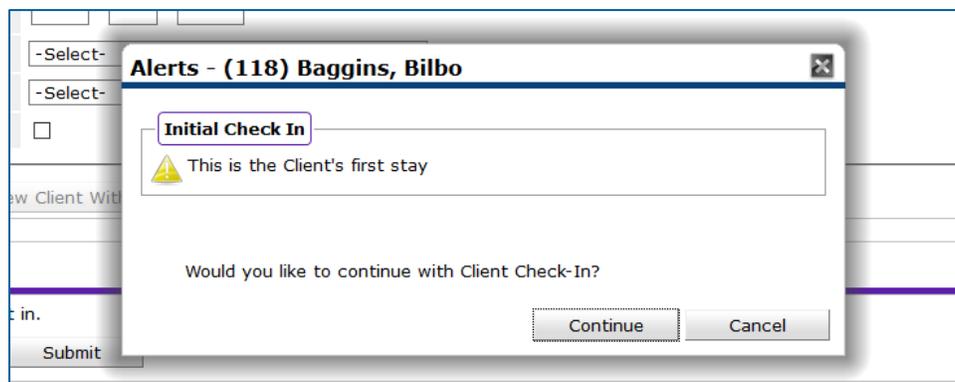
INITIAL CHECK-IN

What does this mean?

This is the first time a particular client record has been checked into your shelter's unit list. Though this alert often indicates that a client has never stayed at your shelter before, if an individual has multiple client records in HMIS, they may have checked-in previously using one of those other records.

What do you need to do?

Confirm that you have selected the correct client record. If the right record has been chosen, 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 things that should be shared with other agencies or should appear as a pop-up when a client is checking into shelter. Examples include upcoming doctor's appointments, pending referrals for housing, or a negative interaction staff had with a client. Notes about a client can also be entered into the **Client Notes** section on the **Client Profile** tab.

		Provider	Note Date	Note Preview	Full Note
✏️	🗑️	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, 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 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.
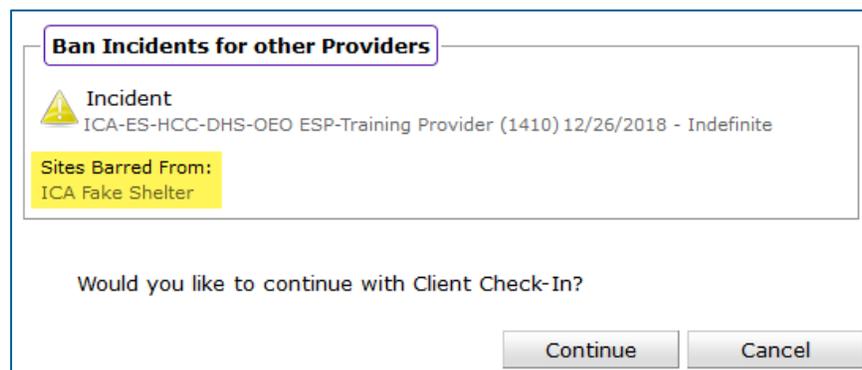
What do you need to do?

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 provides you with information that may or may not require additional action: for example, the alert may ask you to remind the client of an upcoming doctor's appointment. Review the pop-up, take any necessary action, then 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 provides you with information that may or may not require additional action: for example, the alert may ask you to remind the client of an upcoming doctor's appointment. Review the pop-up, take any necessary action, then 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 your shelter's 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. (Return to the beginning of the Incidents section for more info.)
    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.