

SHELTERPOINT WORKFLOW

THE ADULT SHELTER CONNECT

Instructions for creating emergency shelter bed reservations for single adults in Hennepin County.

TABLE OF CONTENTS

Before Doors Open for the Day	2
Reserve a Shelter Bed	2
Client Appears on the Unit List	2
Create a Reservation for the Client	3
Appendix A: Create a Community Card	4
Appendix B: Create a New Client Record.....	6
Appendix C: Document that a Client Could not be Served	7
View a List of Clients that Could Not be Served	7
Appendix D: Confirm a Client’s Participation in Coordinated Entry	8

BEFORE DOORS OPEN FOR THE DAY

Prepare for clients' arrival by checking for system alerts and reviewing shelters' unit availability.

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. Select **ShelterPoint** from the navigation menu on the left side of the screen.
4. Click on the shelter provider listed at the top of the **Provider** drop-down menu, then select **Check Unit Availability**. Note how many units (beds or mats) are available, then click on **Exit**.
5. Continue moving through the provider list until you have checked all shelters' unit availability.

RESERVE A SHELTER BED

When reserving a shelter bed for a client, it is important to verify that their information in ServicePoint is accurate and that the most appropriate destination is selected for them.

1. Select **ClientPoint** from the navigation menu on the left side of the screen.
2. When a client comes in, ask for their **Community Card**.
 - a. If the client cannot present a Community Card, follow the instructions in **Appendix A: Create a Community Card** before proceeding to the next section.

CLIENT APPEARS ON THE UNIT LIST

1. Check that the client's appearance and their **Community Card** picture match.
 - a. If there does not appear to be a match, request a secondary form of ID from the client to confirm their identity. Should the secondary form of ID not match the Community Card or the client not be able to produce another ID, confiscate the Community Card. Follow the instructions in **Appendix A: Create a Community Card** to create a new card for them.
2. Return the card to the client and ask them to scan it.
3. Select the **Client Profile** tab and confirm that the Alias field contains the word **SHARED**.
 - a. If **SHARED** is not entered into the Alias field, add it.

4. Review the **Shelter Stays** section on the **Summary** tab to see where the client has stayed previously. This information can help you decide where to reserve a bed for the client.
 - a. If there is a blank shelter stay listed for today, the client has already made a reservation.
5. Check the **Incidents** section to see whether there are any entries from the single adult shelters.
 - a. If the client is banned from one of the shelters, do not send them there!
6. Click on the **Client Profile** tab and review the answers in the **ASC HUD ESG All Inclusive A** assessment. Update any information that is no longer accurate, then scroll down to the bottom of the screen and click on **Save**.
 - a. If the assessment is not complete, back date to the date of the first shelter stay before filling out the assessment. The back date can be changed at any time by clicking on **Back Date** in the top right corner of the screen. ICA recommends setting the time to **12:00:00 AM** for most dates.
7. Click on the **Assessments** tab and complete the **ASC Entry/Diversion Assessment**. Use third person pronouns when responding to these questions (e.g. he, she, they).
8. Select the **ASC Shelter Placement Assessment** from the **Select an Assessment** drop-down menu and click on **Submit**. Complete this assessment to help figure out where client will be best served.
 - a. If the client discloses that they are a sex offender or are not sure whether they meet that definition, check their status on the **Search for Offenders and Fugitives** page of the Minnesota Department of Corrections website.

CREATE A RESERVATION FOR THE CLIENT

1. Select **ShelterPoint** from the navigation menu on the left side of the screen.
2. From the **Provider** drop-down menu, pick the provider whose shelter inventory you would like to view, then click on the **Check Unit Availability** button.
 - a. There are two types of shelter providers in HMIS: Extended Stay and Night-by-Night. Extended Stay shelters require a reservation to be made when a client is new to the shelter or has been absent for a set period of time; Night-by-Night shelters require a reservation to be made for every client every night. To see a shelter’s type, search for the shelter provider in **ResourcePoint** and find its **Method for Tracking ES Utilization**.

Project Type:	Emergency Shelter (HUD)
Direct Service Code:	Yes
Program Site Configuration Type:	Single site, single building
Site Type:	Residential: special needs only
Housing Type:	Site-based - single site
Geocode:	273120
Method for Tracking Emergency Shelter Utilization:	Night-by-Night

Extended Stay shelters use the Entry/Exit method for tracking ES utilization.

- In the **Unit Availability** pop-up, verify that there are beds available for reserving.

Unit Lists							
Provider ▲	Unit List	Type	Total Units	Used	Available	Overflow	Capacity
 Institute for Community Alliances (ICA) (no data entry)	Test shelter	Emergency Shelter	16	0	16	0	0%

Showing 1-1 of 1

- If the first choice shelter does not have any open beds, close the **Unit Availability** pop-up. Select the next best option from the **Provider** drop-down menu and check that shelter’s availability. Continue in this manner until you find an open bed for the client.
- Pick the correct unit list from the **Unit List** drop-down menu, then click on the **Submit** button.
 - Select the **View All** option from the **ShelterPoint Dashboard**.
 - Find any bed with the word “**EMPTY**” in the **Client** column, then click on **Hold**. Do not worry about choosing a specific bed for the client: that will happen at the shelter.
 - If a bed is held by accident, click on “**HELD**” in the **Client** column to release that hold.

	Date In	Program	Room	Bed	Hold	Client
		First floor	Section 1	A		HELD
		First floor	Section 1	B		HELD
		First floor	Section 1	Bed 017	Hold	EMPTY
		First floor	Section 1	C		HELD

- Scroll down and click on the **Add Reservation** button.
- Ask the client to scan their **Community Card**. When the client’s information appears in the **Unit Reservation Data** pop-up, click on **Save**.
- Provide the client with a shelter information card to inform them about the shelter where they have a reservation, including its address, how to claim their bed/mat, and the shelter’s rules.
 - If a client cannot be served for any reason, such as a refusal to accept the shelter placement given to them, refer to **Appendix C: Document that a Client Could Not Be Served**.

APPENDIX A: CREATE A COMMUNITY CARD

Whether a client needs their first ever Community Card or a replacement for a lost card, follow the instructions below to create one in ServicePoint.

- 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.
 - If the client does not have an ID, they may provide you with their personally identifying information verbally.
- Select **ClientPoint** from the navigation menu on the left side of the screen.

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.

Name	First	Middle	Last
	Belladonna		Took
Name Data Quality	Partial, Street Name, or Code Name Reported		
Alias	SHARED		
Social Security Number	- - -		
Social Security Number Data Quality	Client refused (HUD)		
U.S. Military Veteran?	Client refused (HUD)		

4. Before clicking on a client’s name in the **Client Results** table, make sure that the client ID is seven digits long and the word **SHARED** is present in the **Alias** field. You should also verify that the client’s **Date of Birth** and **Social Security Number** match.
 - a. If you are unable to locate a client, follow the instructions in the next section, **Appendix B: Create a New Client Record**, to add them to the system.
5. When prompted, enter the date of the client’s first shelter stay into the **Back Date** field and click on **Set New Back Date**. If the client’s record was created today, select **Use Current System Date**.
 - a. The back date can be changed at any time by clicking on **Back Date** in the top right corner of the screen. ICA recommends setting the time to **12:00:00 AM** for most dates.

6. Click on the **Client Profile** tab.

7. Check whether the client record has a photo. If there is no picture, follow these steps:

- a. Take a photo of the client with your webcam.
- b. Select **Change** under the empty portrait.
- c. Click on **Browse** in the **Upload Client Image** pop-up. When the File Explorer window appears, locate the picture file and double-click on it.
- d. Back in the **Upload Client Image** pop-up, select **Upload**.



8. Click on **Issue ID Card**, then select **Generate ID Cards**. All of the correct settings should already be selected.

- a. If there is an issue with the way that Community Cards are printing out, contact the MN HMIS helpdesk at mnhmis@icalliances.org.

9. A new web browser tab will appear. Press **CTRL+P** or click on the **printer icon**, then follow the prompts to print the ID (Community) card. Once the card is printed, hand it to the client.

APPENDIX B: CREATE A NEW CLIENT RECORD

If a client does not have a shared record in HMIS, one should be created for them. These instructions assume that you have already logged into ServicePoint and navigated to the Client Search page.

1. Discuss the **HMIS Release of Information** with the client. The client has two options at this point:
 - a. **SHARE:** The client consents to have the information collected about them to be shared through Minnesota’s HMIS with other partner agencies. If the client consents to share their information, move on to step 2.
 - b. **DO NOT SHARE:** The client does not want any of the information about them in Minnesota’s HMIS shared with any other partner agencies. If the client does not consent to share their information, tell them to call 2-1-1 after 7:00 p.m. to request a bed for the night. Any community card created for them will not work outside of the shelter that creates it.
2. Type the client’s information into the **Client Search** boxes. It is important to fill out these boxes as completely as possible.
3. Click on **Search**. (ServicePoint requires this step before a new client record can be created.)
4. Type the word **SHARED** into the **Alias** field, since this client has agreed to statewide data sharing.
5. Click on **Add New Client With This Information**, then select **Ok** in the confirmation pop-up to continue with creating the record.
6. When prompted by the **Back Date Mode** pop-up, select **Use Current System Date**.
7. Scroll down to the **ASC HUD ESG All-Inclusive A** assessment and fill it out as completely as possible. Make sure to record today’s date in the **Date of ROI Consent** field.
8. When all available information has been entered, scroll down to the bottom of the screen and click on **Save**.
9. Attach a digital copy of the client’s HMIS Release of Information to their client record. At the bottom of the **Client Profile** tab is a section titled **File Attachments**. Follow these steps to upload an HMIS ROI there:
 - a. Click on **Add New File Attachment**.

File Attachments						
		Date Added ▼	Name	Description	Type	Provider
			01/26/2017	HMIS-ROI_10-01-16.pdf		pdf Institute for Community A
<div style="background-color: #ffff00; padding: 2px; display: inline-block;">Add New File Attachment</div> 						

- b. Click on **Browse** in the **Upload Attachment** pop-up. When the File Explorer window appears, locate the HMIS ROI file and double-click on it.
 - c. Back in the **Upload Attachment** pop-up, select **Upload**.

APPENDIX C: DOCUMENT THAT A CLIENT COULD NOT BE SERVED

In the event that a client cannot be placed at any shelter or refuses to accept the shelter placement offered to them, you will want to document that outcome using a service transaction. These instructions assume you are already looking at the client's record.

1. Select the **Service Transactions** tab, then click on **Add Need**.
2. In the **Need Information** section, make the following selections:
 - a. Provider: Hennepin-HCC-Adult Shelter Connect (4083). If a different provider is listed here, make sure you are not in EDA mode as another provider.
 - b. Need: Emergency Shelter (BH-1800)
 - c. Date of Need: The default value should be your current date and time.
 - d. Need Status: Closed
 - e. Outcome of Need: Not Met
 - f. If Need is Not Met, Reason: Pick the most accurate option.
3. If you selected **Client Refused Service** as the reason the client's need was not met, note which shelter the client did not want to be placed at.
4. When all fields have been filled out, click on **Save & Exit**.

VIEW A LIST OF CLIENTS THAT COULD NOT BE SERVED

Run a Service Transaction report to see which clients could not or declined to be served.

1. Select **Reports** from the navigation pane.
2. Click on the **Service Transaction** report icon.
3. Fill out the following report options:
 - a. Provider: Hennepin-HCC-Adult Shelter Connect (4083)
 - b. Provider Search Type: The selected provider ONLY
 - c. Services: Needs Entered by my provider
 - d. Need Date Range: Enter the date range that you would like to examine.
 - e. Need Outcome: Not Met
4. When the prompts have been filled out, click on **Build Report**.
5. A **Service Transaction** table will appear that lists the clients who meet the criteria you specified. You can download an Excel-ready version of the report by clicking on **Download Results**.

APPENDIX D: CONFIRM A CLIENT’S PARTICIPATION IN COORDINATED ENTRY

When you speak with an unsheltered client about their coordinated entry status, record a Service Transaction to show that they are continuing to seek housing through the coordinated entry system. A client may have several of these services recorded for them.

1. Click on **Enter Data As** and enter EDA mode as provider **4314**.
2. Select **ClientPoint** from the navigation menu.
3. Open the client’s record by scanning their **Community Card**, entering their **Client ID#**, or searching for them.
4. Select the **Service Transactions** tab, then click on **Add Service**.
5. In the **Add Service** section, make the following selections:
 - a. **Service Provider**: Hennepin Singles Coordinated Entry Assessment (4314).
 - b. **Start Date**: The date that you spoke with the client. Set the time to 12:00:00 AM.
 - c. **End Date**: The same date and time as the Start Date.
 - d. **Service Type**: Housing Related Coordinated Entry
6. When all fields have been filled out, click on **Save & Continue**.
7. A new screen with additional fields will appear. Scroll down to the bottom without making any changes and click on **Save & Exit**.

Service Start Date	Service End Date	Provider of Service	Provider Creating	Service Type
11/14/2018	11/14/2018	Hennepin Singles Coordinated Entry Assessment	Hennepin Singles Coordinated Entry Assessment	Housing Related Coordinated Entry
10/25/2018	10/25/2018	Institute for Community Alliances (ICA)	Institute for Community Alliances (ICA)	Information and Referral

The resulting service will look similar to this one, except that the Service Start Date and Service End Date will be different.