ShelterPoint Training
Entry Exit & ShelterPoint Method

This workflow document is to instruct users on the Entry-Exit ShelterPoint Workflow in HMIS. Programs using the Entry-Exit workflow can use ShelterPoint independently of the client's entry record in ClientPoint. ShelterPoint is used as a way to keep an active list of the clients staying at the program, and all of their records are recorded and maintained in the ClientPoint module.

Client Entry into ShelterPoint to create client list

This section will cover the basics of entering a client into HMIS by using the ClientPoint and ShelterPoint modules. This section will also provide a broad overview of the ShelterPoint options and functionality.

Please enter clients into HMIS using the standard workflow in ClientPoint as described in the HMIS Introductory Packet. Once you have created an entry for your client into your program, please following the preceding steps in ServicePoint to maintain an active list of the clients that are staying at your program.

1) Click on the “ShelterPoint” tab.

2) Select the appropriate Unit List from the dropdown options. If the correct provider is not displayed, please go back and ensure you are in the correct “Enter Data As” mode.

3) Select “Submit”

Overview of ShelterPoint Dashboard

Check Client In: This option will give you the “Shelter Inventory Information” which displays all the beds and associated clients staying in those beds. For more detail about the different features and functions of the Shelter Inventory information, please see the section below titled “ShelterPoint Inventory Information List and Functionality.”

Check In Referral: This feature is not currently used.

Hold ALL Empty Beds: This option will display all empty beds as “Held” to indicate that they should not be assigned to incoming clients.

Print ID Cards: This option displays a prompt to click the checkbox for some or all clients and print their ID cards (if your program is utilizing ScanPoint).

Update Confirmation List: This pulls up all clients who are currently in shelter. If you check their name, the column “Confirmation” changes to a “Yes” in the main view. This prevents the client from appearing when you click on the “Transmit Today’s Check Out List”.

Transmit Today’s Check Out List: This option displays a prompt to select multiple or all clients that are exiting the program at the same time.

View All: This option will give you the Shelter Inventory Information which displays all the beds and associated clients staying in those beds. For more detail about the different features and functions of the Shelter Inventory information, please see the section below titled “ShelterPoint Inventory Information List and Functionality.”

5) Select “View All”

ShelterPoint Inventory Information List and Functionality

Bed icon: This icon is used to enter a client onto the unit list and to exit a client from the list. The icon will be displayed with a green plus sign to check a client in when selected. The icon will be displayed with a red minus icon to check a client out when selected.

Date In: Displays the day the client was entered into the program.

Floor: Displays the floor name or number if applicable.

Room: Displays the floor name or number if applicable.

Bed: Lists the bed number

Hold vs. Held functionality: When selected the word, “Hold” will appear as blank for the Hold column and will display “*HELD*” for the client name to indicate that this bed is not available. To un-hold a bed, simply select the word “*HELD*.” This will display “Hold” again as the default.

Empty vs. Client Name (will cover functionality later):

Date of Birth: Displays the client’s Date of Birth.

Sex: Displays the client's biological classification as male or female.

Gender: Displays the client’s self-identified gender (Optional per agency).

Group ID: Displays the client’s Household group ID number (if applicable).

Filtering options:

- **Display:** This option allows you to choose to display “All Beds,” “Empty Beds,” or “Full Beds.”
- **Sort By:** This option allows you to choose to sort the unit list by the following categories (but only one category at a time): Floor, Room, Bed, Client, Date of Birth, Gender, and Group ID.
    - **Ascending:** This option accompanies the “Sort By” option, and will display the option selected in “Sort By” in ascending or descending order according to your selection.

Print unit list: This option allows you to print the current unit list of clients by bed number.

Hold all Empty units: This option will display all empty beds as “Held” to indicate that they should not be assigned to incoming clients.

Release all Held units: This option will display **all** beds listed as “Held” to be listed as “Hold” to indicate that they can be assigned to incoming clients.

Return to ShelterPoint Dashboard: Selecting this button will bring you back to the ShelterPoint Dashboard

Print ID Cards: This option displays a prompt to click the checkbox for some or all clients and print their ID cards (if your program is utilizing ScanPoint).

Update confirmation list: This pulls up all clients who are currently in shelter. If you check their name, the column “Confirmation” changes to a “Yes” in the main view. This prevents the client from appearing when you click on the “Transmit Today’s Check Out List”.

Transmit today’s check-out list: This option displays a prompt to select multiple or all clients that are exiting the program at the same time.

TO ENTER A NEW CLIENT

1) Select the bed icon to enter a client onto the unit list for HMIS.

   a) The screen will change. Refer to the steps below.

2) Enter the search criteria, as outlined below.
   a) **Name:** First and last name are required.
      i) The following projects have additional guidance. Please refer to the relevant addendum.
         (1) SSVF
         (2) RHY
   b) **Name Data Quality:** This dropdown describes the data quality of the name.
   c) **Alias:** Section to place an alternate or second name.
   d) **Social Security Number:** Only enter the digits known. Do not use placeholders for empty spaces.
      i) The following project has additional guidance. Please refer to the relevant addendum.
         (1) SSVF
   e) **SSN Data Quality:** This dropdown describes the data quality of the SSN.
      i) Please note, a person without a SSN would have "Client Doesn't Know" selected.
   f) **U.S. Military Veteran:** Select the appropriate option from the dropdown.
      i) The following projects have additional guidance. Please refer to the relevant addendum.
         (1) SSVF
         (2) RHY
   g) **Sex:** Select the appropriate option from the dropdown.
   h) **Exact Match:** Do NOT use.

3) Click "Search" once all criteria have been completed.
   a) Please note: If you provider has enabled the incidents setting, you will see a pop-up detailing any incidents or bans for the client.

4) If your client populates under the "Client Results" section, you may select the client in one of two ways. Both methods will take you to the "Client Profile" tab, as outlined in the next section.
   a) Click on the green plus icon to the left of the client name.
   b) Click on their Client ID number name.

5) Enter the "**Date In**" as the same date as the client's entry into your program. The system will default the date to today's date.
   a) Please note: For instances when a client entered the program day(s) ago, but was not yet entered into HMIS, please change the date to the date they entered the program.

   <u>Optional selections:</u>

   *a) **Midnight Check In:** Selecting this button will default the time stamp for the client's entry to be*

   11:59:59

   *b) **Assign Unit:** Selecting this button allows you to assign the client to a specific Floor, Unit and bed number.*

6) <u>INCIDENTS</u>:

a) Add New Incident: Select this button if there is an incident or ban that you would like to record for your client.

7) <u>HOUSEHOLD MEMBERS :</u>
   a) Households should be established using the standard workflow as outlined in the HMIS Introductory packet. Households will be listed here for selection. If the Household needs to be updated, please select the ClientPoint module, search for the client, and update the Households according to the standard workflow.
   b) Select the checkbox for any Household members that are also entering the program (if the client is not associated with a Household, none will be displayed).
   c) Choose the "Assign Unit" button for each Household member and select an "Overflow" bed for all children.

8) <u>RELEASE OF INFORMATION</u>
   a) Select "**View ROI Details.**"
      i) The client's ROI should have been recorded according to the standard data entry workflow in ClientPoint. If you do not see an ROI recorded, please record one here by following the steps outlined below.
         (1) Select "**Add Release of Information**."
            (a) **Household Members:** Select the Household members that are entering the program together and all have the same ROI designation
            (b) **Provider:** Ensure the Provider listed is correct
            (c) **Release Granted:** Select whether or not the client agreed to share their information
            (d) **Start Date:** Enter the same date as the entry date
            (e) **End Date:**
               (i) For BOS: Enter a date of one year following the entry date
               (ii) For Maricopa: Enter 01/01/2099
            (f) **Documentation:** Select how the ROI was administered
            (g) Select **Save Release of Information**
            (h) Select **Exit**

9) ENTRY DATA:
   a) **Provider**: Ensure the "Provider" is correct. (If it is not correct then you are not in "Enter Data As" mode. Cancel entry command and get into EDA mode first.)
   b) **Type**: Choose the project type from those displayed. If not applicable, the default is "**HUD"**

10) Select **Save & Exit**

Exiting your client from your unit list in ServicePoint

This section will cover exiting a client from your unit list in ServicePoint. Users should follow the standard workflow as outlined in the HMIS Introductory packet and exit clients from their program through the ClientPoint module accordingly. Exiting them in ShelterPoint is simply an additional step to update your active client list.

1) From the ShelterPoint Dashboard, select the "View All" option

2) Select the Bed Icon for the Head of Household or individual that you are exiting from the unit list.

3) **Date Out:** The date will automatically populate as today's date. The date should match the exit date recorded for the client on the client's Entry/Exit tab in ClientPoint. If the client left the prior to the date defaulted, please change the date accordingly.

4) **Reason For Leaving:** This option will be defaulted. If the client left for a reason other than the one defaulted, please change it accordingly.

5) **Destination:** This option will be defaulted. If the client had a destination other than the one defaulted, please change it accordingly.

6) <u>HOUSEHOLD MEMBERS:</u>
    a. Select the checkbox for each member of the Household that is being exited from the unit list with the Head of Household. Household members that are not selected will remain on the unit list.

7) Select **Save & Exit**