ShelterPoint Training

ShelterPoint Method (Creates Entry)

This workflow document is to instruct users on the Entry/Exit ShelterPoint Workflow in HMIS. According to the Entry/Exit workflow, all client entries and associated assessments should be recorded through ShelterPoint.

Initial Client Entry into HMIS via ShelterPoint

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

1) Login to ServicePoint. For more information, please see the HMIS Introductory Packet.

2) Select an "Enter Data As" mode for the program you are entering the client into.
   a. *Please note: If you do not see any options listed under "Enter Data As" then your default user access listed in the upper left corner of ServicePoint is the only program you have access to. Clients will automatically be entered into this program*

3) Click on the "ShelterPoint" tab.

4) 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.

5) 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. This option is not generally used in the Entry-Exit ShelterPoint workflow.

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 check a client into the program and to exit a client. 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.

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, Sex, 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 into the program 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) **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) If your client does not populate, click the "Add New Client with this Information" button. This will create a new client record.
   a) The screen will change. Refer to the steps below.

6) Enter the "**Date In**" as the date the client entered the program. The system will default the date to today's date.
   a) Please note: For instances when a client entered the program a 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.*

7) <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.

8) <u>HOUSEHOLD OVERVIEW (For Family Programs Only):</u>
   a) Click on the drop-down option to see this field
   b) If the Head of Household already has a household established,
      i) DO NOT create another one. If the household is missing a member, or if the "relationships" are in error, click the "Manage Household" button.
         (1) A pop-up will appear.
      ii) Check the existing data to ensure it is accurate.
         (1) **Household Type:** Ensure the correct household type is reflected in the associated dropdown.
         (2) **Head of Household:** There may be only 1(one) Head of Household. This is normally the person who qualifies for the project.
         (3) **Relationship to Head of Household:** Ensure the proper option is selected for each person's dropdown.
         (4) **Joined Household:** This is the date the members were added to the household in HMIS.
      iii) In order to add household members click on the "Add/Delete Household Members" button.
      iv) DO NOT delete household members. This will negatively impact data.
      v) A pop-up will appear. Expand the "Add Clients to the Household" section by clicking the black arrow. The screen will expand.
      vi) Enter the appropriate search information and click "Search".
      vii) There are two ways to add a client to the household after the search is complete.
         (1) If the client was already in the system, they will appear under **Client Results**. Click on the green plus sign next to the client's name.
         (2) If the client is NOT already in the system, click the "Add New Client With This Information" button.
      viii) For either of the above methods, the new household member's name will appear under the **Selected Clients** section.
      ix) Continue adding clients as outlined above until the household is complete. Click the "Continue" button.

*Refer to step 2 in this section to update the **Household Type**, **Head of Household**, **Relationship to Head of Household**, and **Joined Household** fields.*

b. If the Head of Household does NOT have an Established Household

1) Click on the "Start New Household" button.

a. A pop-up will appear.

2) Choose the “Household Type” from the drop down list (circled above).
   3) Enter the appropriate search information and click “Search”.
4) There are two ways to add a client to the household after the search is complete.
   a. If the client was already in the system, they will appear under **Client Results**. Click on the green plus sign next to the client’s name.
   b. If the client is NOT already in the system, click the “Add New Client With This Information” button.
5) For either of the above methods, the new household member’s name will appear under the **Selected Clients** section.
6) Continue adding clients as outlined above until the household is complete. Click the “Continue” button.
7) Update the following data fields.
   a. **Household Type:** Ensure the correct household type is reflected in the associated dropdown.
   b. **Head of Household:** There may be only one (1) Head of Household. This is normally the person who qualifies for the project.
   c. **Relationship to Head of Household:** Select the proper option for each household member. The Head of Household will be listed as ‘self’.
8) Click “Save & Exit”. You will be returned to the main tab.

9) <u>HOUSEHOLD MEMBERS (For Family Programs Only):</u>
   a) 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).
   b) Choose the “Assign Unit” button for each Household member and select an “Overflow” bed for all children.

10) <u>RELEASE OF INFORMATION (for the Balance of State only).</u>
   a) Select “**View ROI Details.**”
      i) Select “**Add Release of Information**.”
         (1) **Household Members:** Select the Household members that are entering the program together and all have the same ROI designation
         (2) **Provider:** Ensure the Provider listed is correct
         (3) **Release Granted:** Select whether or not the client agreed to share their information
         (4) **Start Date:** Enter the same date as the entry date
         (5) **End Date:** Enter a date of one year following the entry date
         (6) **Documentation:** Select how the ROI was administered
         (7) Select **Save Release of Information**
         (8) Select **Exit**

11) 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"**

12) Select **Save & Exit.** This will bring you back to the Unit List.

13) From the Unit List, find the client's name and click on it. This will bring you back into their profile, but there are now tabs displayed at the top of the pop-up.

14) Navigate to the "**Entry/Exit**" tab
    a) An entry was created for the client when you checked them into a bed. Click on the pencil icon to the left of the existing entry for your program (**Do Not** create a new entry. You simply need to edit and update the existing entry).
    b) Select the Universal Data Elements (UDE) Assessment and complete according to the detailed instructions given in the HMIS Introductory packet.
    c) From the left-hand pane, select the next household member (if applicable) and complete the UDE assessment for them as well. Complete this process for each household member.
    d) Select the Entry Assessment and complete it according to the detailed instructions given in the HMIS Introductory packet. Select "Save."
    e) From the left-hand pane, select the next household member (if applicable) and complete the Entry Assessment for them as well. Complete this process for each household member.
    f) Complete any additional or custom assessments for the Head-of-Household and associated household members in the same manner.
    g) Select "Save & Exit."

Client Updates in HMIS via ShelterPoint

15) Click on the ShelterPoint module. This will bring you to the ShelterPoint Dashboard

16) Select "**View All**."

17) From the Unit List, find the client's name and click on it. This will bring you back into their profile, with tabs displayed at the top.

18) Navigate to the "**Entry/Exit**" tab
    a) Click on the Interim Update icon to the right of the existing entry for your program.
    b) Select the assessment you would like to record a change for and complete the update according to the detailed instructions given in the HMIS Introductory packet. Select "Save."
    c) From the left-hand pane, select the next household member (if applicable) and complete the associated assessment to record any changes to their accounts as well. Complete this process for each household member.
    d) Select "Save & Exit."

Exiting a client(s) from your Program

This section will cover exiting a client(s) from your HMIS project. If you are working with a household, you will want to select the Head of Household for the following steps.

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 recording an exit for.

3) **Date Out:** The date will automatically populate as today's date. If the client left the program prior this, 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 exiting the program with the Head of Household. Household members that are not selected will remain on the unit list.

7) Select **Save & Exit**