HOMELESS MANAGEMENT INFORMATION SYSTEM 5.8

MOSBE: Salinas/Monterey, San Benito

April 2013

HMIS 5.8 Workflow
Shelter Programs

1671 The Alameda • Suite 300
San José, CA 95126
Phone 408.437.8800 • Fax 408.437.916

Workflow: Table of Contents

Best Practices

It's best if your client has already been entered in Client Point before entering a shelter stay. Doing so will result in less data quality issues.

Shelter Point for your program may be configured to allow adding a ROI and completing the Program UDEs assessment as you enter a shelter stay for the client.

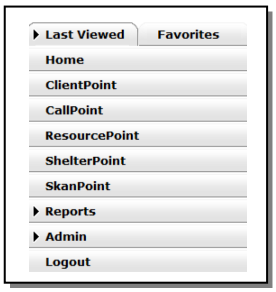
If you do not complete the ROI and/or Program UDEs assessment while entering a shelter stay OR if your Shelter Point is not configured with these options: enter this data in Client Point as soon as possible.

Version 5.8 Overview

Shelter Point is a centralized management system for shelters. It provides the ability to document client check-in/check-out, view unit availability, refer a client, reserve a unit, and can function as a client roster.

Shelter Point 5 has a new look, along with new navigational features:

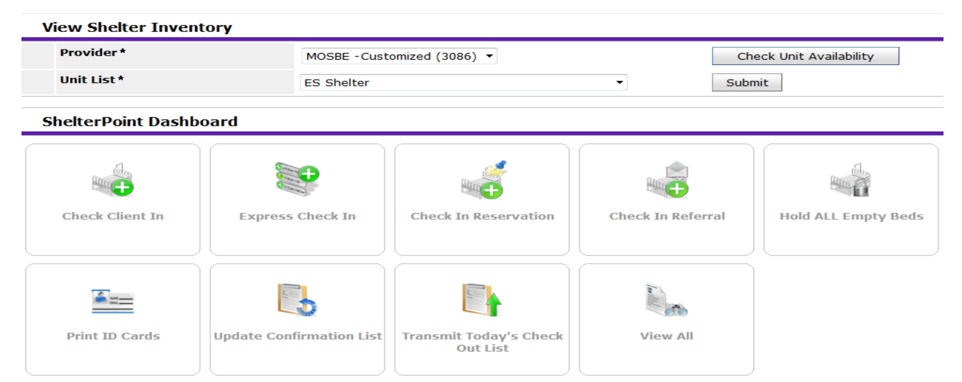
- **Icon based Dashboard**
- **Express Check In**



Access Shelter Point:

- Log in to HMIS. This takes you to your **Home Dashboard**
- Click **Shelter Point** (left side of screen)
- Page refreshes to **Shelter Point Dashboard**
- Default **Provider** and **Unit List** displays
- **Operate multiple shelters or have multiple units?** Select the shelter or unit list, then click **Submit**

Shelter Point Dashboard



Want a detailed look of clients currently in your shelter?

Click the **View All** icon
3 sections display:

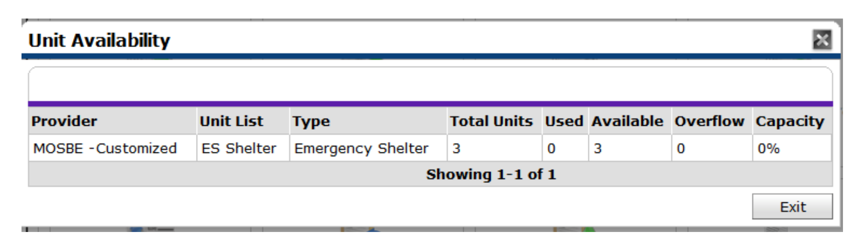
Sec 1: current unit (bed) list, clients checked into a unit, if units are held or empty, along with clients in overflow units

Sec 2: all reservations for a future date

Sec 3: referrals

Check Unit Availability

At the top right of your dashboard is the **Check Unit Availability** button. Click this button to see a preview of all units: those that are in use, available, overflow, and what percentage of capacity is being used.



Client Check In: Single

How do I check in a client?

Individual Client check in

The workflow described below assumes the following:

- Your program has been configured to use Shelter Point
- A unit inventory (bed list) has been entered
- Default assessment is **MOSBE Profile – Program UDEs**

Click **Shelter Point,** then click **Client Check In** icon

- **Unit List** for shelter will display
- Click on **EMPTY** or
- **Client Search** page opens
- Search for client by **Name** and/or **SSN**
- **Client found?** Results will appear (more than one name may be listed)

Unit List - ES Shelter

Display All Beds

	Floor	Room	Bed	Hold	Client
	Floor 1	Room 1	Bed 001	Hold	EMPTY
	Floor 1	Room 1	Bed 002	Hold	EMPTY
	Floor 1	Room 1	Bed 003	Hold	EMPTY
			Overflow (New)		EMPTY

Searched for client & client not found?

Workflow to add new client

- Complete **Name,** plus **SSN** (if applicable)
- Click **Add New Client**
- Select best match
- **Follow workflow from Client Results graphic on down**

Client Results

		ID	Name	Social Security Number	Date of Birth
		235035	San Benito, Monterey	145-89-6543	02/01/1984

Showing 1-1 of 1

- Verify the name and other visible demographic date (example: SSN, DOB)
- If this is the client, click to the left of the client's ID to check the client in
- **Note: once a client is selected you can change the time of check-in or select Midnight Check In as well as add notes**

Additional data entry on Unit Entry Data:

- **Release of Information**: add ROI if one is not already visible
- **Entry Data**: defaults to your default **Provider** (change if necessary) and **HUD** type program entry
- **MOSBE Profile – Program UDEs**: complete or update data fields
- Also possible to add **Services** or **Multiple Services**
- Click **Save & Exit**

- After clicking **Save & Exit** the **Shelter Point Dashboard** appears
- **What to see all clients checked in?** Click the **View All** icon

Client Check In: Households

How do I check in a client?

Clients in Household check in

The workflow described below assumes the following:

- Your program has been configured to use Shelter Point
- A unit inventory (bed list) has been entered
- Default assessment is **MOSBE Profile – Program UDEs**

Click **Shelter Point,** then click **Client Check In** icon

- **Unit List** for shelter will display
- Click on **EMPTY** or
- **Client Search** page opens
- Search for **Head of Household** by **Name** and/or **SSN**
- **Client found?** Results will appear (more than one name may be listed)

Unit List - ES Shelter

Display All Beds

	Floor	Room	Bed	Hold	Client
	Floor 1	Room 1	Bed 001	Hold	EMPTY
	Floor 1	Room 1	Bed 002	Hold	EMPTY
	Floor 1	Room 1	Bed 003	Hold	EMPTY
			Overflow (New)		EMPTY

Searched for client & client not found?

Client Results

	ID	Name	Social Security Number	Date of Birth
	235035	San Benito, Monterey	145-89-6543	02/01/1984

Showing 1-1 of 1

Workflow to add new client

- Complete **Name,** plus **SSN** (if applicable)
- Click **Add New Client**
- Select best match
- **Then follow workflow from the Client Results graphic on down**

- Verify the name and other visible demographic date (example: SSN, DOB)
- If this is the client, click to the left of the client's ID to check the client in
- **Note: once a client is selected you can change the time of check-in or select Midnight Check In as well as add notes**

Additional data entry on Unit Entry Data:

- **Release of Information**: add ROI if one is not already visible
- **Entry Data**: defaults to your default **Provider** (change if necessary) and **HUD** type program entry
- **MOSBE Profile – Program UDEs**: complete or update data fields
- Also possible to add **Services** or **Multiple Services**
- Click **Save & Exit**

- After clicking **Save & Exit** the **Shelter Point Dashboard** appears
- **What to see all clients checked in?** Click the **View All** icon

Express Check In: Single clients

Express Check In is a feature that allows a group of clients to be quickly checked in at once. Information that is entered in Express Check In will apply to all clients checked in during the check in process.

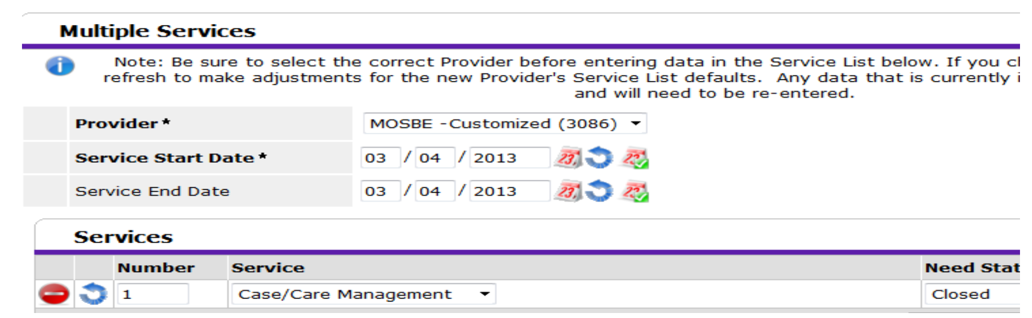
The workflow described below assumes the following:

- Express Check In has been activated for your shelter
- **Client(s) already entered in HMIS (that is, client has ID number and has completed MOSBE Profile – Program UDEs**

Click **Shelter Point**, then select the correct **Provider** and **Unit List**

Express Check In workflow →

- Check **Express Check In**
- **Note:** client will be assigned the 1st available unit rather than the case manager having the ability to select unit
- Fill the **Date In** and the time of check in or select **Midnight Check In**
- **Entry Data:** updated as necessary
- **Multiple Services:** complete this section if want to enter 1 or more services



Add clients:

Buttons at bottom of Express Check In List:

Remove Last Entry: removes last client added

Clear List: removes all clients

Submit List: assigns all clients to a unit and exits to **Shelter Point Dashboard**

Exit: exits to **Shelter Point Dashboard** without assigning clients to units

Client Search: by name

Select client from **Client Result** area.

Click **Search**

Click ⊕ to the left of client ID. Client appears in **Express Check In list**

Enter next name in **Client Search**

Repeat this process until all clients added

Click **Submit List**

Page refreshes to **Shelter Point Dashboard**

Click **View All** to see list of checked in clients and bed assignments

Client Search: by client ID

Enter **Client ID #**. Click **Submit**

If Client ID number is entered the client will appear on the **Express Check In** list.

Repeat above process until all clients selected

Click **Submit List**

Page refreshes to **Shelter Point Dashboard**

Click **View All** to see list of checked in clients and bed assignments

Express Check In: Households

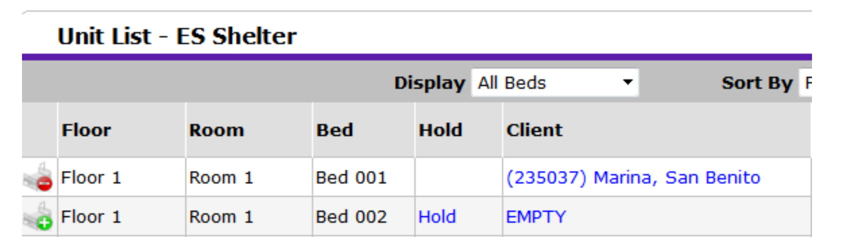
Express Check In works best when you add the heads of households first. Follow the workflow for Altering a Shelter Stay (below) in order to add members to a shelter stay.

Alter a Shelter Stay

Add family member(s) to a shelter stay ➔

From the Shelter Point Dashboard:

- Ensure current **Provider** and **Unit List** selected. Click **View All**
- **Unit List** will display. Click on client's name to alter the stay


Unit List - ES Shelter

Display All Beds Sort By F

	Floor	Room	Bed	Hold	Client
	Floor 1	Room 1	Bed 001		(235037) Marina, San Benito
	Floor 1	Room 1	Bed 002	Hold	EMPTY

- Locate **Household Members**. Click **Check In Additional Family Members**
- Click box to left of name to include. Click **Assign Unit**
- Pop-up window appears. Select available bed from menu. Click **Select**
- Click **Save & Exit** when all members assigned a bed
- Page will refresh. Click **Save & Exit** to return to the **Unit List** page

Delete a shelter stay ➔

From the Shelter Point Dashboard :

- Ensure current **Provider** and **Unit List** selected. Click **View All**
- Click on name of person to delete
- Scroll down to bottom of page
- **Click Delete This Shelter Stay**
- Pop-up window appears. Click **Yes** if want to delete stay
- Click **Yes** or **No** to delete need (click **No** if intend to provide shelter at later date)
- Page refreshes to **Unit List**. Bed previously assigned to client is now EMPTY

Other changes that can be made ➔

From the Shelter Point Dashboard :

- Ensure current **Provider** and **Unit List** selected. Click **View All**
- Click on name of person to make a change to the stay
- Fields under **Unit Entry Data**: change **Date In**; add supplies, locker #
- **Incidents**: add a new incident; update or delete existing incident
- **Entry Data**: change **Provider** or type of entry

Reservations

Reservations allow a unit to be reserved for client showing up in the future.

The workflow described below assumes the following:

- **Check In Reservations** has been activated for your shelter
- Correct **Provider** and **Unit List** selected prior entering **Reservations**

Click Shelter Point. This takes you to the Shelter Point Dashboard:

- Select **Provider** and **Unit List** (top of page)
- Click **Check In Reservations**
- Unit List displays. Click **Add Reservation**
- Search for client by entering in name or client ID. Click **Submit**

Unit Reservation Data screen appears

- **Reservation Date**: enter date client will be showing up
- **Household Members**: select member(s) if client in household and member(s) will be checking in as well
- Click **Save** (this creates a reservation)

Check in client with a reservation ➔

From the Shelter Point Dashboard:

- Click **Check In Reservations**
- **Reservations for Unit List**: click ++ (left of client's name)
- **This assigns client to an overflow bed**
- **Date In**: change date if necessary or click **Midnight Check In**

- **Want to assign client to specific unit?** Click **Assign Unit**
- Select available bed from drop down menu
- Click **Select**
- **Complete rest of page (expand?)**

Click can to delete reservation if it was made in error
Click Cancel Reservation. Pop up window appears. Select best match for Reason need was not met

Update Confirmation List

Update Confirmation List allows a shelter to confirm clients who will be staying in the shelter from one night to the next.

Shelter Point Dashboard: click Update Confirmation List:

- **Client List** appears

Client List

Client ID	Name	Group ID	Bed	Confirm
235037	Marina, San Benito	6879626	Bed 001	☐
222405	Test, Sonya		Bed 002	☐

- **Confirm** column: select all clients who will be staying the next night
- Click **Confirm**
- Pop up window appears: stating whether or not you have successfully confirmed clients. Click **OK**
- Page refreshes to **Shelter Point Dashboard**

To review client list and unit availability:

- Click **View All**
- Ensure correct **Provider** and **Unit List** selected
- Clients appear in **Unit List** selected

Display All Beds **Sort By** Floor Ascending

	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.
	Floor 1	Room 1	Bed 001		(235037) Marina, San Benito	02/04/1993	Female	6879626	Yes
	Floor 1	Room 1	Bed 002		(222405) Test, Sonya	06/25/1969	Female		Yes

- Confirmed clients will have Yes in **Conf.** column
- Click **Check Unit Availability** to review number of beds currently available and current utilization rate

Unit Availability

Provider	Unit List	Type	Total Units	Used	Available	Overflow	Capacity
MOSBE -Customized	ES Shelter	Emergency Shelter	3	2	1	0	67%

Showing 1-1 of 1

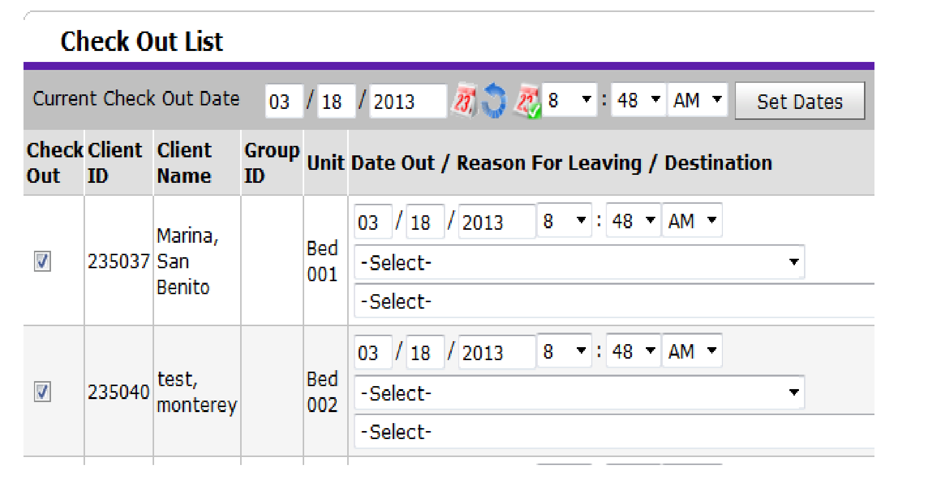
Transmit Check Out List

Transmit Today's Check Out List allows a shelter to check out all clients who have not confirmed an additional night of stay.

Shelter Point Dashboard: click Transmit Today's Check Out list:

Workflow for checking out clients ➔

- **Check Out List** appears
- **Checking out all clients?** Click **Check All**
- **Not all clients checking out?** Click ☐ of client(s) checking out



- **Date Out:** shows current day/time. Update if necessary
- **Supplies Returned** (right side of screen): optional to check
- Under **Date Out** are two fields:
- First data field: **Reason for Leaving**. Second data field: **Destination**
- Select best match for both fields
- Click **Check Out** when done
- Page refreshes to **Shelter Point Dashboard**

Incidents

Incidents help identify clients that have broken shelter rules. If shared, incidents alert other shelters and help determine if the client can stay at their shelter.

New incidents or updating/deleting current incidents can be done in:

- **Shelter Point** while checking in client, or
- **Client Point**: on the **Client Profile Summary** page

In Shelter Point (while checking in a client):

Shelter Point work flow →

- Below **Unit Entry Data** is **Incidents** section. The client's name will be listed
- Follow work flow (below) to add or update/delete incident.

Incidents For (235037) Marina, San Benito

		Ban Start	Ban End	Incident	Ban Code
		03/02/2013		Drugs	

Add New Incident

In Client Point:

Client Point work flow →

- Have your **Client Profile Summary** updated to include **Incidents** dashlet
- Access file of client with incident needing end date

Incidents

	Ban Start	Ban End	Incident	Ban Code	Provider
	03/02/2013	Indefinite	Drugs		MOSBE - Customized

Add New Incident **Showing 1-1 of 1**

Add an incident:

- Click **Add New Incident** to add incident
- Follow workflow in **To add incident while checking in** (see above)

Add end date to incident:

- Click to left of **Ban Start** date
- **Banned End Date**: enter date
- Click **Save**

Delete incident:

- Click **Profile** tab (menu bar, top of screen). Scroll to bottom of page
- Click to left of **Ban Start** date
- Click **Yes**

Skan Point

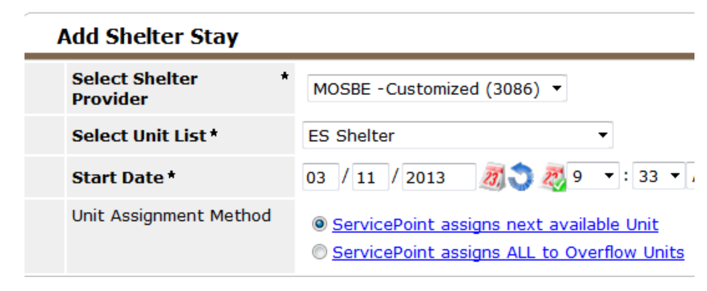
SkanPoint allows the use of bar-coded client ID cards to quickly and accurately enter a shelter stay and services for one or more clients.

This workflow assumes the following:

- **Skan Point** has been activated for your program
- Clients have been issued bar-coded ID cards. If no client ID card, then ID will have to be manually entered
- Program has scan card reader. If no reader, ID will have to be manually entered

Skan Point work flow →

- Click **Skan Point** (left side of screen)
- Click **Add Shelter Stay** (menu bar, top of page)
- Select correct **Provider** and **Unit List**
- Change **Start Date** if needed
- Select **Unit Assignment Method**
- Click **Start Skan**



Want to use or learn more about Skan Point? **Contact your CTA representative for assistance.**