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Collaborate. Coordinate. Evaluate.

# *ShelterPoint™*

# Data-Entry Workflows

Connecting Communities > Demonstrating Outcomes™

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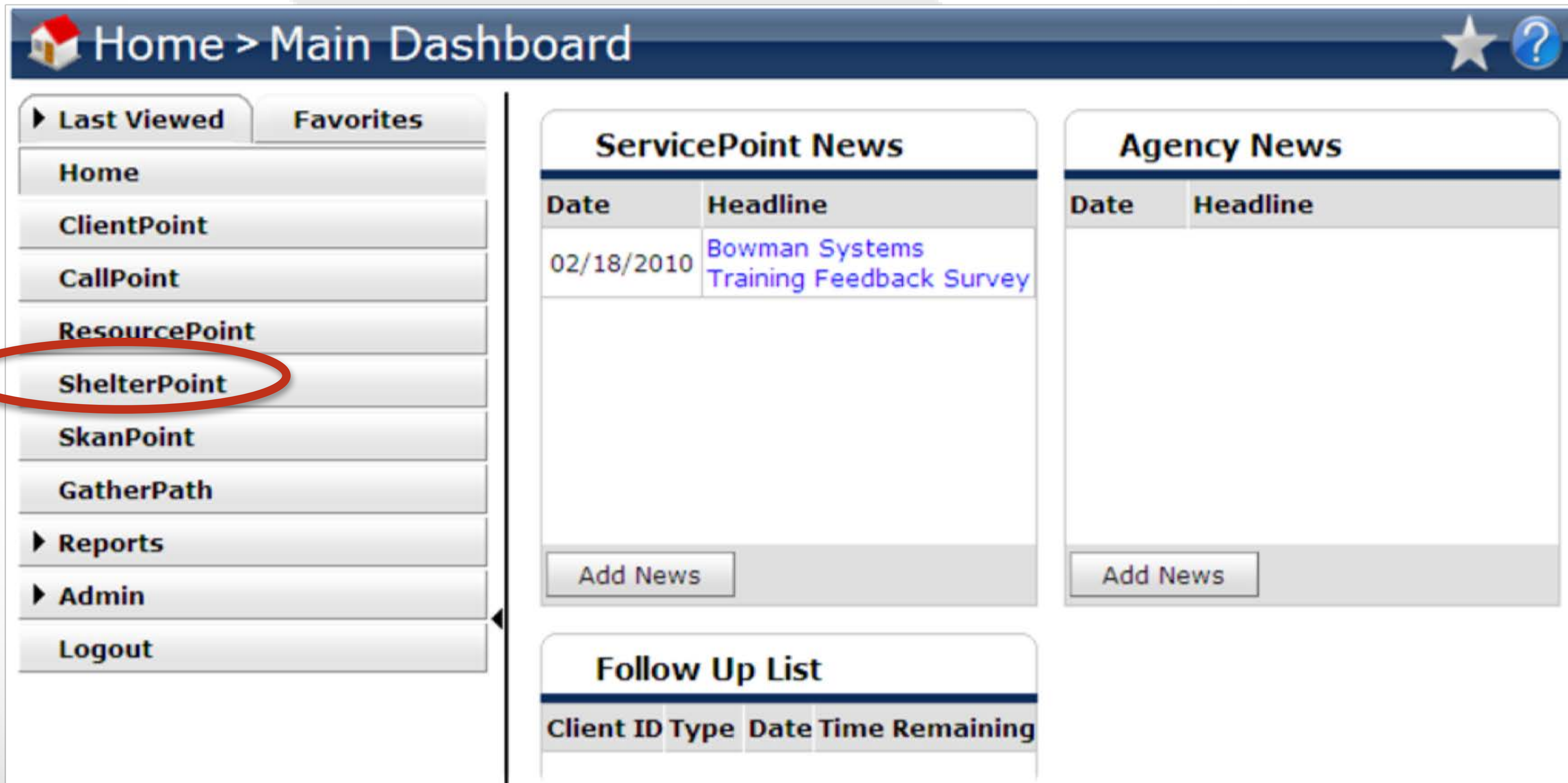
# ShelterPoint



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# What is *ShelterPoint*?

The *ShelterPoint* module is a centralized unit management system and information resource for shelters. It provides the ability to document client check in and checkout, view unit availability, refer a client, reserve a unit, and can function as a client roster.

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# Learning Objectives

**After reviewing this presentation, you will understand how to:**

- **Login to ServicePoint®**
- **Navigate to *ShelterPoint***
- **View Shelter Inventory**
- **Enter an Individual into a Unit**
- **Enter a Household into Units**
- **Use Express Check In**
- **Check in Reservations**
- **Check in Referrals**
- **Use Confirmation List & Check Out List**
- **Additional Features**

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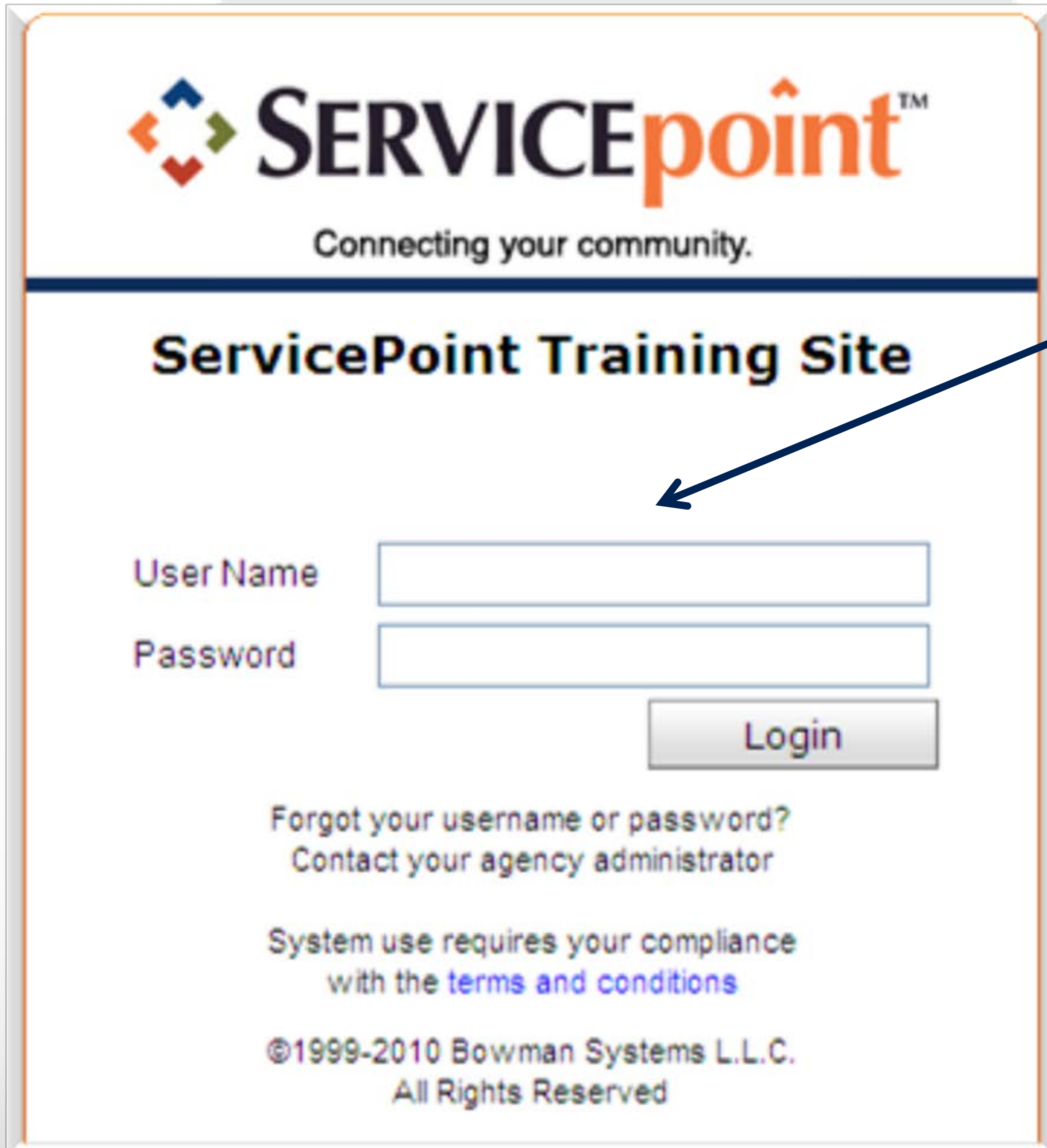
# *ShelterPoint* v5.2.3




Begin by logging into *ServicePoint®* using your assigned Username & Password.

Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint®*.

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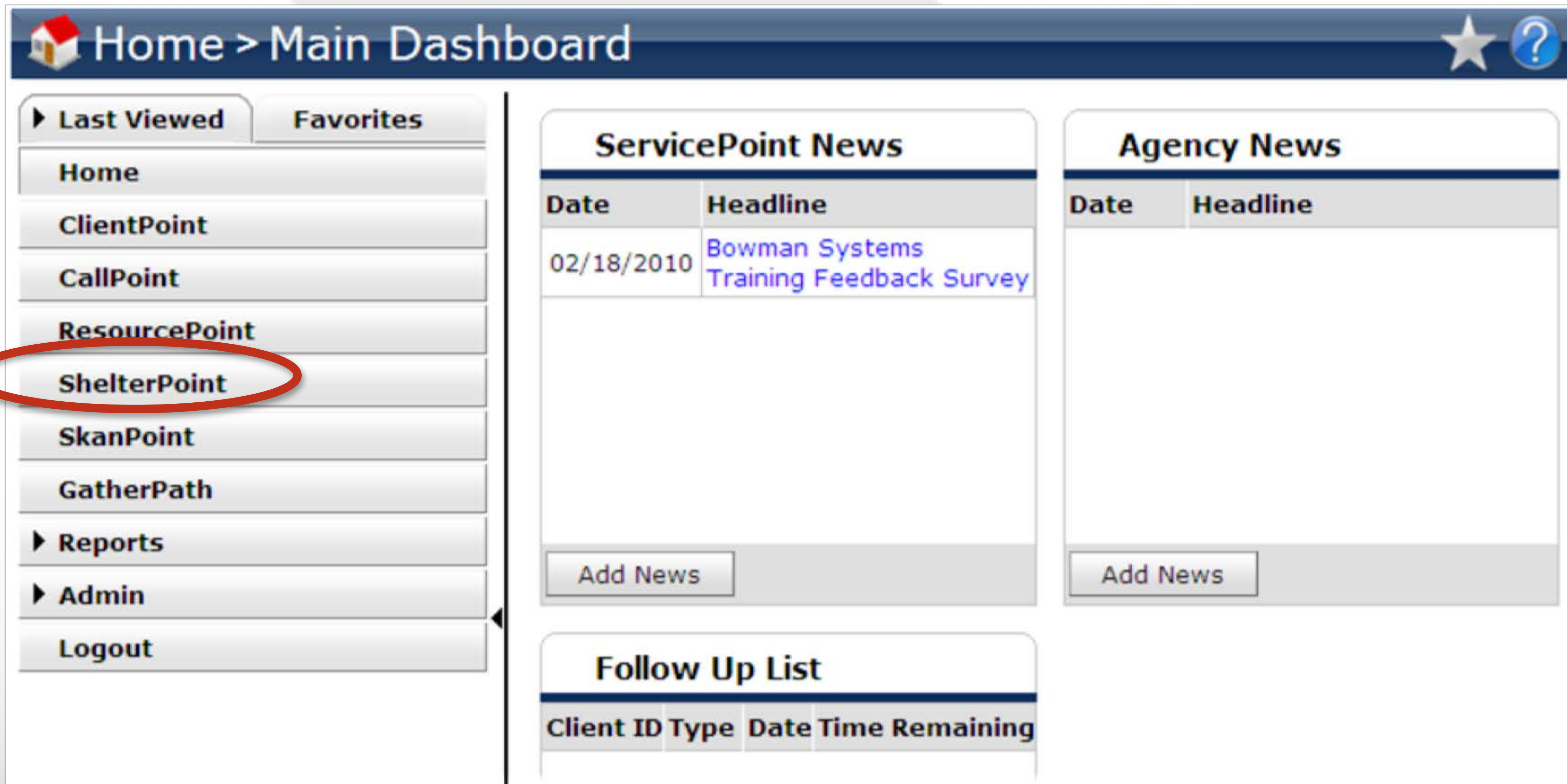
# ShelterPoint v5.2.3

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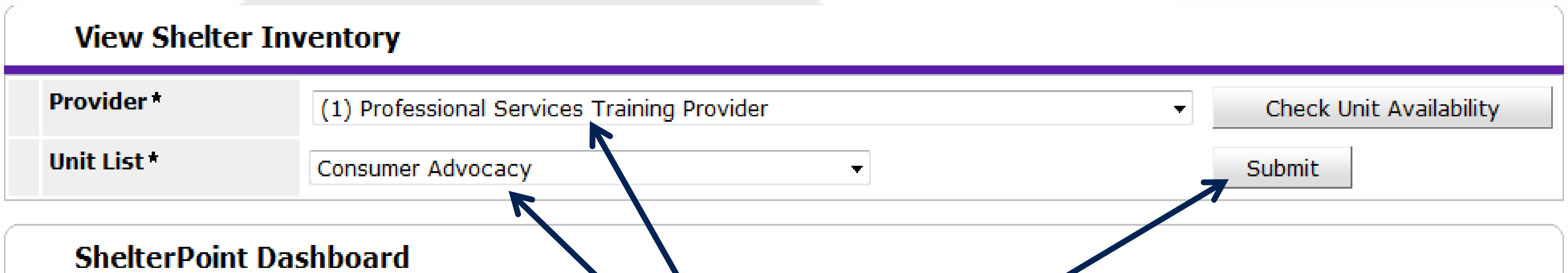
Collaborate. Coordinate. Evaluate.

# *ShelterPoint* Main Menu




To access the ShelterPoint Dashboard a Provider must first be selected followed by selecting a Unit List for that provider. After Both fields have been selected click on the “Submit” button

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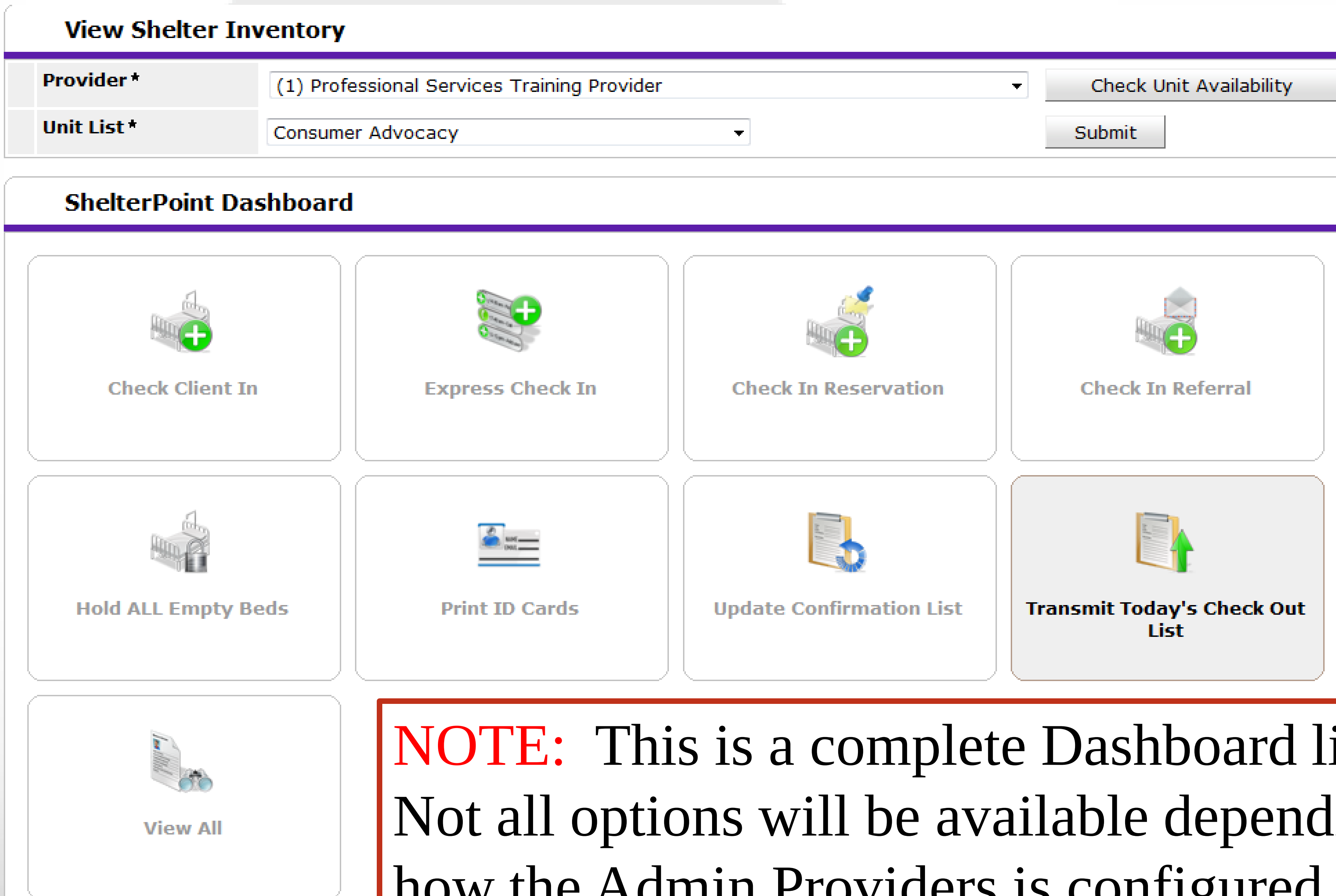
# *ShelterPoint* Main Menu




NOTE: This is a complete Dashboard list. Not all options will be available depending on how the Admin Providers is configured.

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View Shelter Inventory

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# View Shelter Inventory

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# View Shelter Inventory

Select a Provider from the drop down list.
**NOTE:** *Only Providers with a unit list created will appear.*

**View Shelter Inventory**

**Provider *** -Select- Check Unit Availability

**Unit List *** -Select- Submit

Once the provider is selected you can "Check Unit Availability" to see a quick preview of all Units used, available, overflow units, and what percentage of capacity is being used. .

**Unit Availability**

**Unit Availability**

| | Provider | Unit List | Type | Total Units | Used | Available | Overflow | Capacity |
|---|---|---|---|---|---|---|---|---|
| | Professional Services Training Provider | Consumer Advocacy | Women's Section | 60 | 3 | 57 | 1 | 5% |
| | Professional Services Training Provider | Abby's Training Roster | Other | 154 | 20 | 134 | 1 | 12% |
| | Professional Services Training Provider | Abby's Training List | Emergency Shelter | 10 | 4 | 6 | 0 | 40% |

Exit

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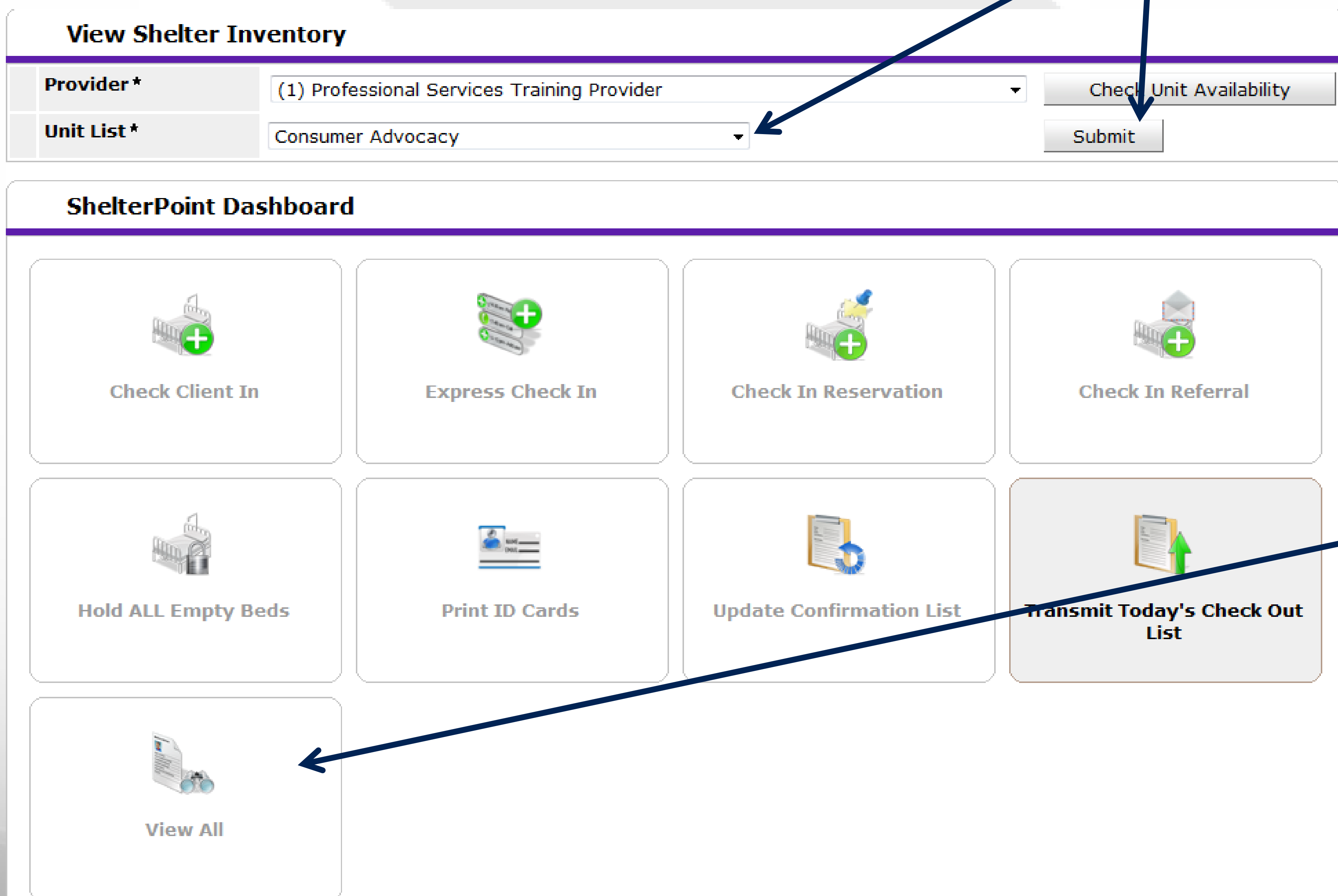
# View Shelter Inventory

To view detailed information on a specific Unit Select the unit from the drop down list and click on "Submit"




After you click on the submit button to view information click on "View All"

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# View Shelter Inventory

"View All" will display the following 3 parts. The first is the Current Unit list. It will show clients that are checked in a unit, if units are held or empty, and all overflow units with clients checked into them.

**Shelter Inventory Information**

**Unit List - Abby's Training List**

**Display** All Beds **Sort By** Floor Ascending Sort

| Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|---|---|---|---|---|---|---|---|---|---|
| Main | West Wing | Bed 001 | | (11) Burgess, Abby | 03/09/1980 | Female | 653 | No | |
| Main | West Wing | Bed 002 | | (12) Pickett, Ted | | | 653 | No | |
| Main | West Wing | Bed 003 | | (421) Test, Ladybug | | | | No | |
| Main | West Wing | Bed 004 | | (205) test, tim | 04/15/1977 | | | No | |
| Main | West Wing | Bed 005 | | HELD | | | | | |
| Main | West Wing | Bed 006 | Hold | EMPTY | | | | | |
| Main | West Wing | Bed 007 | | (422) Test, Bumblebee | | | | No | |
| Main | West Wing | Bed 008 | Hold | EMPTY | | | | | |
| Main | West Wing | Bed 009 | | (258) Penzes, Maria | | | | No | |
| Main | West Wing | Bed 010 | | (199) Smurf, Papa | 10/04/1920 | Male | | No | |
| | | Overflow (New) | | EMPTY | | | | | |

Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

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# View Shelter Inventory

The second section shows all clients that have a unit reserved for a future date.

**Reservations for Unit List - Abby's Training List**

| | | Arrival Date | Client | Date of Birth | Gender | Group ID | |
|---|---|---|---|---|---|---|---|
| | | 09/12/2010 | test, kid | | | 1405 | Cancel Reservation |

Add Reservation — **Showing 1-1 of 1**

The final section shows all referrals made for shelter stays.

**Outstanding Referrals - Professional Services Training Provider (1)**

| | | Referral Date | Name | Need Type | Referred By | Date of Birth | Gender | Group ID |
|---|---|---|---|---|---|---|---|---|
| | | 06/03/2010 | (11) - Burgess, Abby | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | 03/09/1980 | Female | 546 |
| | | 06/22/2010 | (332) - Burgess, Ted | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | | | 807 |
| | | 06/22/2010 | (11) - Burgess, Abby | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | 03/09/1980 | Female | 807 |

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Enter Individual

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# Enter an Individual into a Unit

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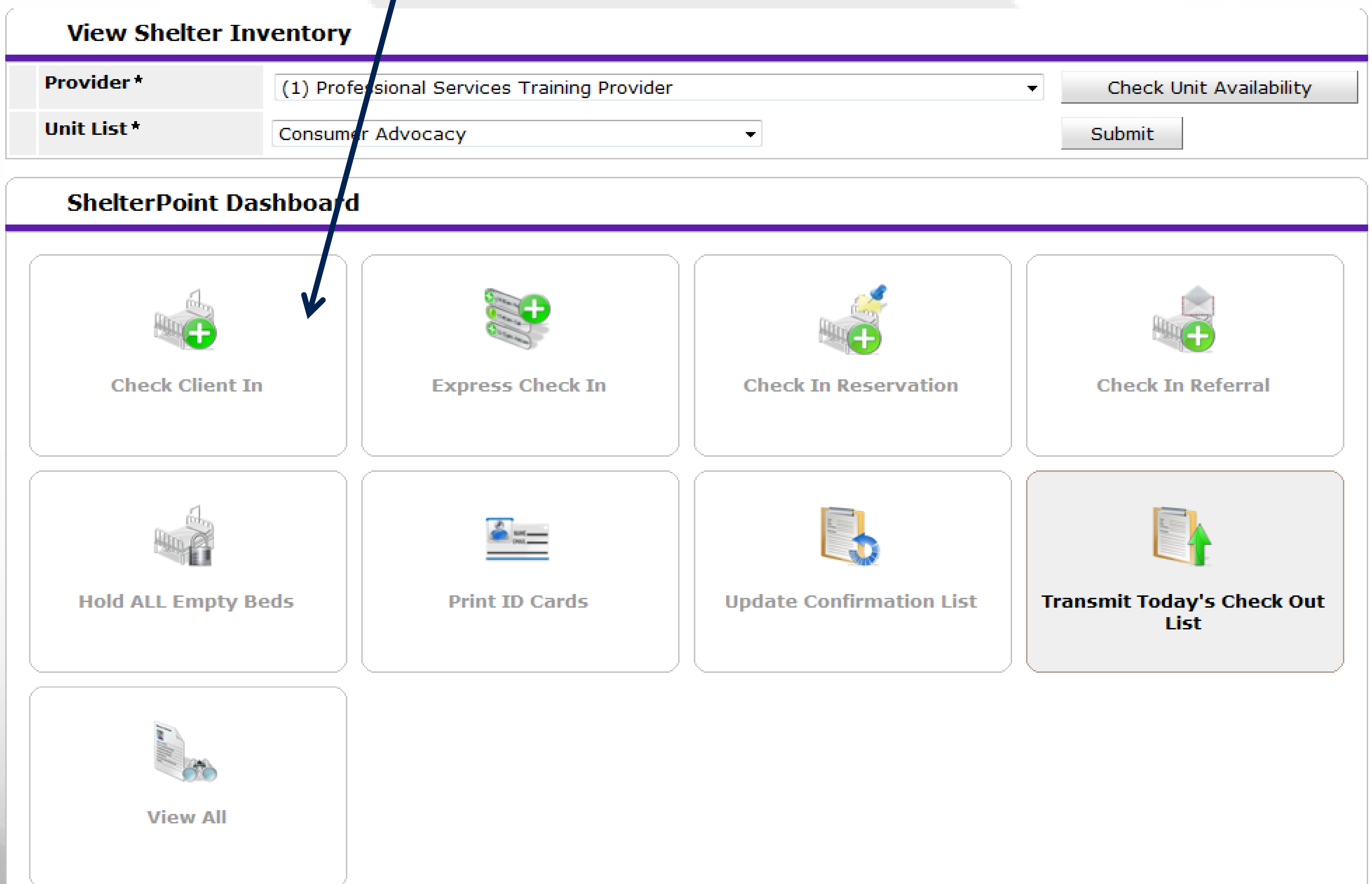
## Enter Individual

Select the Provider and Unit List you wish to work with then click on “Check Client In”



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## Enter Individual

Once the "Check Client In" is selected the following unit list will appear. From here click on the Check In icon or "Empty" unit.

### Shelter Inventory Information

#### Unit List - Abby's Training List

Display: All Beds  Sort By: Floor  Ascending  Sort

| | Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|---|---|---|---|---|---|---|---|---|---|---|
| | Main | West Wing | Bed 001 | | (11) Burgess, Abby | 03/09/1980 | Female | 653 | No | |
| | Main | West Wing | Bed 002 | | (12) Pickett, Ted | | | 653 | No | |
| | Main | West Wing | Bed 003 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 004 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 005 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 006 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 007 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 008 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 009 | | (258) Penzes, Maria | | | | No | |
| | Main | West Wing | Bed 010 | | (199) Smurf, Papa | 10/04/1920 | Male | | No | |
| | | | Overflow (New) | | EMPTY | | | | | |

Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

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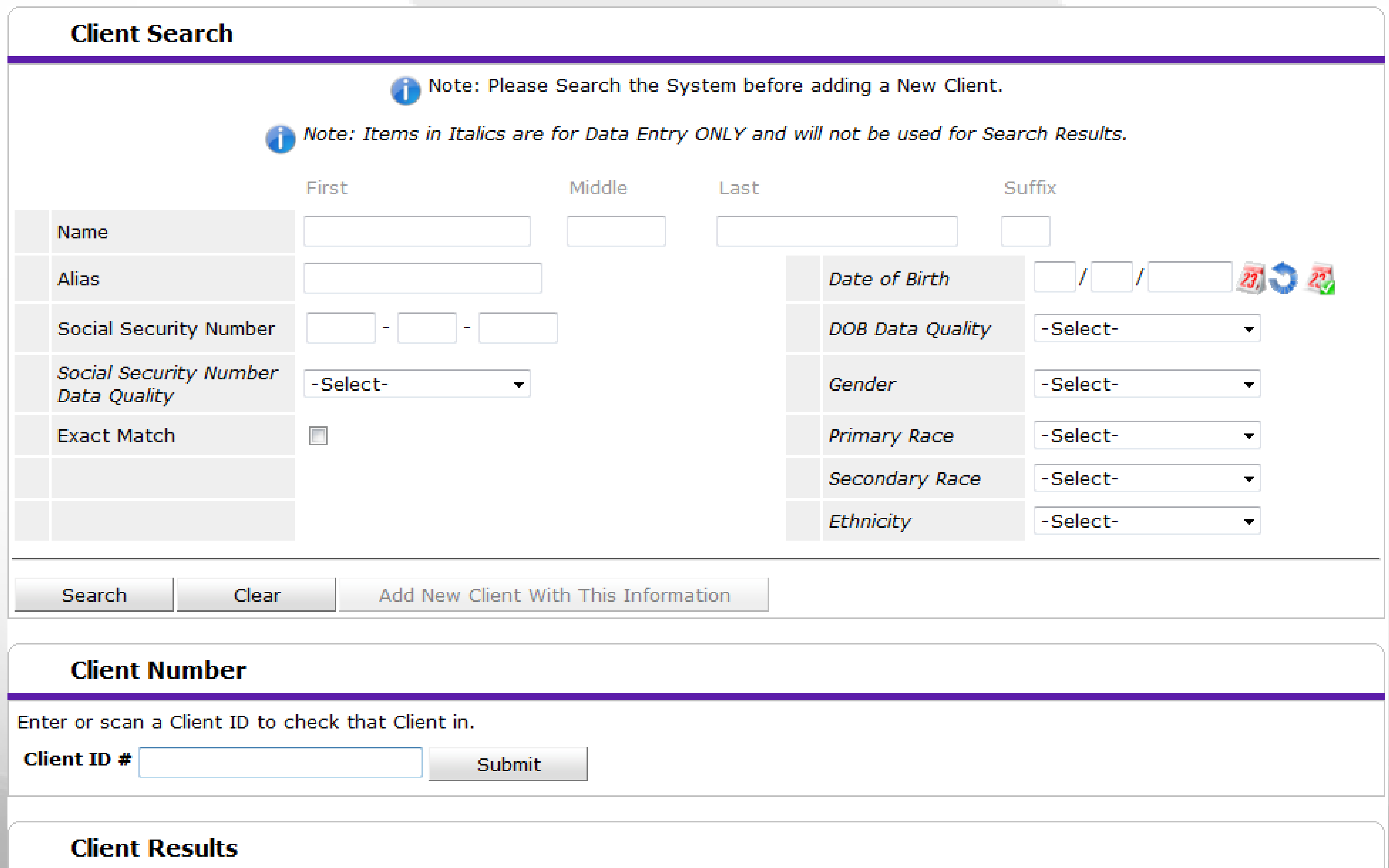
# Enter Individual

You will perform a Client Search and select the client from the Client Result area or add client information. Client ID number can also be used.



**Client Search**

Note: Please Search the System before adding a New Client.

*Note: Items in Italics are for Data Entry ONLY and will not be used for Search Results.*

| | First | Middle | Last | Suffix |
|---|---|---|---|---|
| Name | | | | |
| Alias | | | | |
| Social Security Number | - - | | | |
| *Social Security Number Data Quality* | -Select- | | | |
| Exact Match | ☐ | | | |

| | |
|---|---|
| *Date of Birth* | / / |
| *DOB Data Quality* | -Select- |
| *Gender* | -Select- |
| *Primary Race* | -Select- |
| *Secondary Race* | -Select- |
| *Ethnicity* | -Select- |

Search Clear Add New Client With This Information

**Client Number**

Enter or scan a Client ID to check that Client in.

**Client ID #** Submit

**Client Results**

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# Enter Individual

The Client Results section will appear after a client has been searched for.

Note: Client Results will not appear if Client ID Number is used. Client ID Number will take the user to the “Unit Entry Data” screen.

**Client Results**

| | | Name | Social Security Number | Date of Birth | Alias | Gender | Banned |
|---|---|---|---|---|---|---|---|
| + | | (131) - Chucktest, Second | --5423 | | | | |
| + | | (206) - test, kid | -- | | | | |
| + | | (205) - test, tim | -- | 04/15/1977 | bob | | |

Verify the Client Name, Social Security if provided, Date of Birth, and Gender. If the client is a match click on the green plus icon to check the client in.

# For Your Information

**The Client Search procedures outlined in slides 16 and 17 are used throughout this presentation and are not duplicated for each section. Please review the check in process now if you have questions.**

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## Enter Individual

Once a client is selected you will be able to change the time of Check In or select Midnight Check In (11:59 PM) as well as make additional notes.

### Unit Entry Data - (175) Bird, Tweety

| | |
|---|---|
| Date In | 09 / 09 / 2010 11 : 31 AM — Midnight Check In |
| Unit Name / Number | Bed 003 |
| Supplies Given | |
| Locker number | |
| Codes/Notes | |

### Incidents For Tweety Bird

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| | | | No matches. | | | |

Add New Incident

### Household Sharing

Add Household Data

### Release of Information

| | |
|---|---|
| Release of Information | None |

View ROI Details

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## Enter Individual

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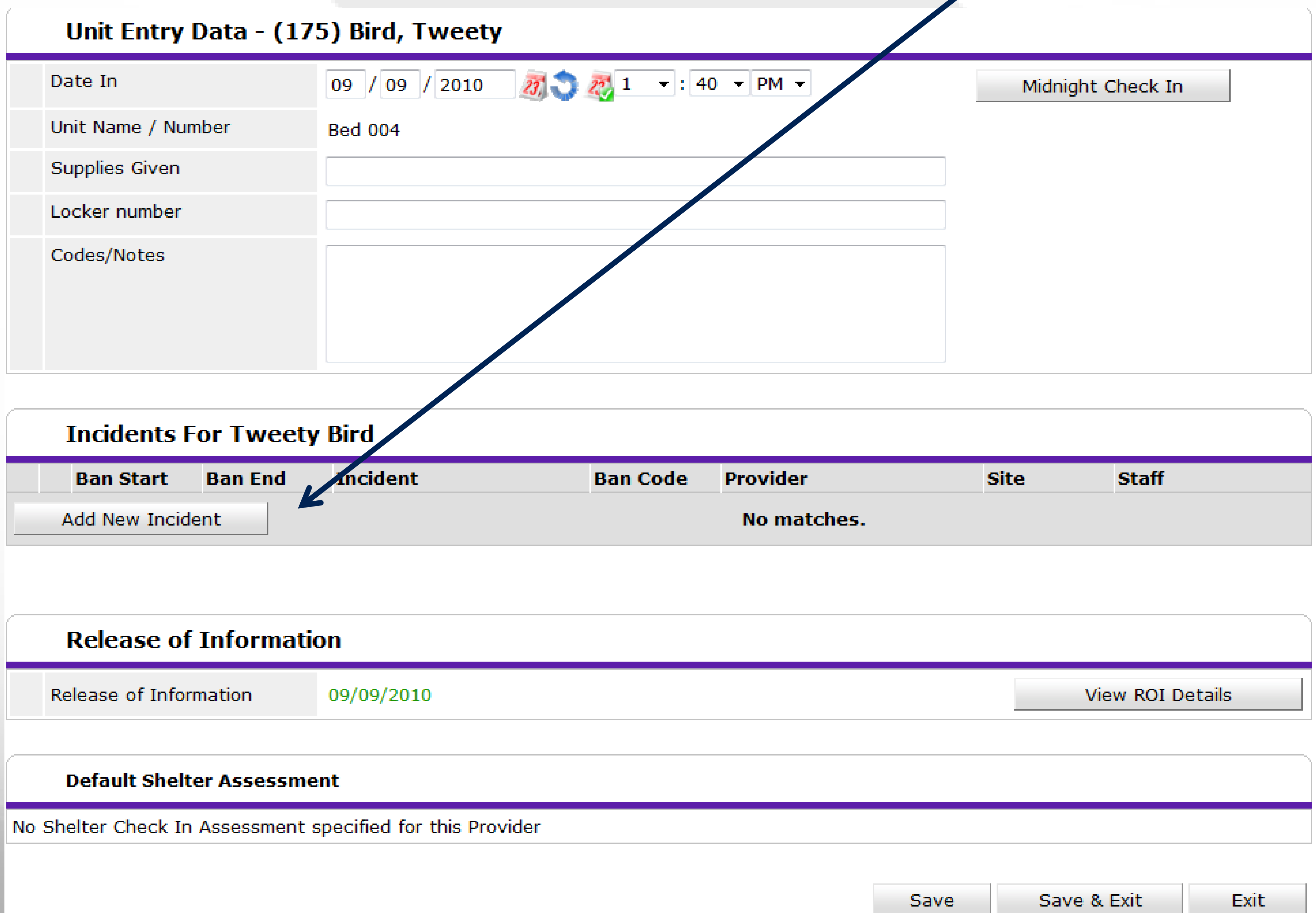
**Verify that there are no incidents prohibiting the client entering shelter.**



### Unit Entry Data - (175) Bird, Tweety

| | |
|---|---|
| Date In | 09 / 09 / 2010 1 : 40 PM Midnight Check In |
| Unit Name / Number | Bed 004 |
| Supplies Given | |
| Locker number | |
| Codes/Notes | |

### Incidents For Tweety Bird

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | No matches. | | | |

### Release of Information

| | | |
|---|---|---|
| Release of Information | 09/09/2010 | View ROI Details |

### Default Shelter Assessment

No Shelter Check In Assessment specified for this Provider

Save Save & Exit Exit

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## Enter Individual

You will then enter the Release of Information if it is appropriate.

### Unit Entry Data - (175) Bird, Tweety

| | | |
|---|---|---|
| Date In | 09 / 09 / 2010 1 : 40 PM | Midnight Check In |
| Unit Name / Number | Bed 004 | |
| Supplies Given | | |
| Locker number | | |
| Codes/Notes | | |

### Incidents For Tweety Bird

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | | No matches. | | |

### Release of Information

| | | |
|---|---|---|
| Release of Information | 09/09/2010 | View ROI Details |

### Default Shelter Assessment

No Shelter Check In Assessment specified for this Provider

Save Save & Exit Exit

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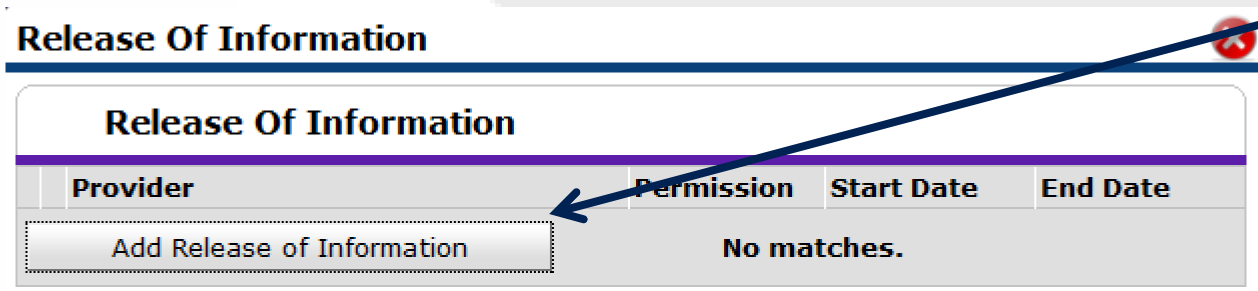
## Enter Individual

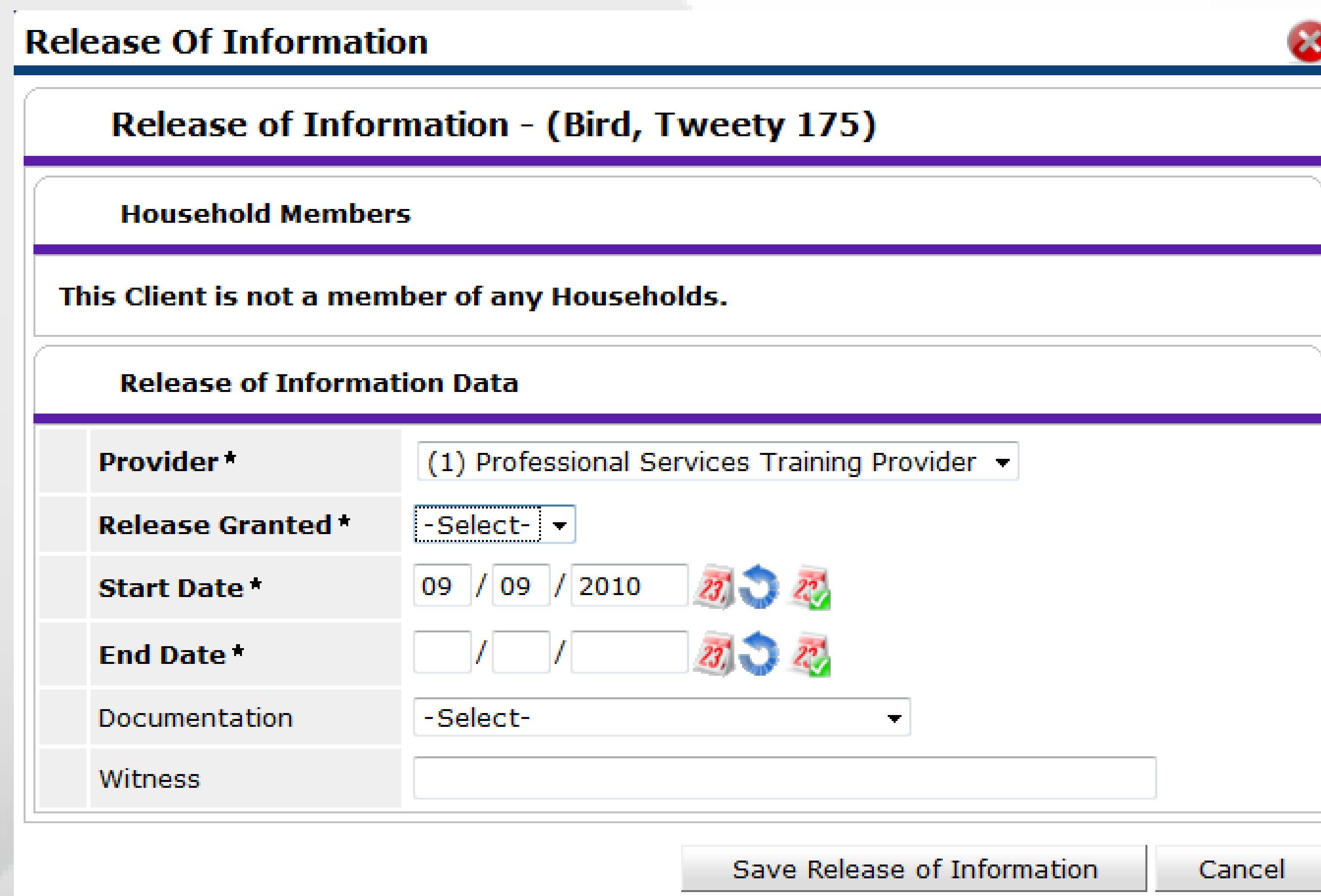
In the pop up window click on "Add Release of Information"


**Release Of Information**

**Release Of Information**

| Provider | Permission | Start Date | End Date |
|---|---|---|---|
| Add Release of Information | No matches. | | |

Fill in the Release of Information and Save the Release of Information.


**Release Of Information**

**Release of Information - (Bird, Tweety 175)**

**Household Members**

This Client is not a member of any Households.

**Release of Information Data**

| | |
|---|---|
| Provider * | (1) Professional Services Training Provider |
| Release Granted * | -Select- |
| Start Date * | 09 / 09 / 2010 |
| End Date * | / / |
| Documentation | -Select- |
| Witness | |

Save Release of Information | Cancel

**Enter Individual**

Once you have entered all relevant information save your information at the bottom of the Unit Entry Data screen

### Unit Entry Data - (175) Bird, Tweety

| | |
|---|---|
| Date In | 09 / 09 / 2010 1 : 40 PM — Midnight Check In |
| Unit Name / Number | Bed 004 |
| Supplies Given | |
| Locker number | |
| Codes/Notes | |

### Incidents For Tweety Bird

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | No matches. | | | |

### Release of Information

| | | |
|---|---|---|
| Release of Information | 09/09/2010 | View ROI Details |

### Default Shelter Assessment

No Shelter Check In Assessment specified for this Provider

Save | Save & Exit | Exit

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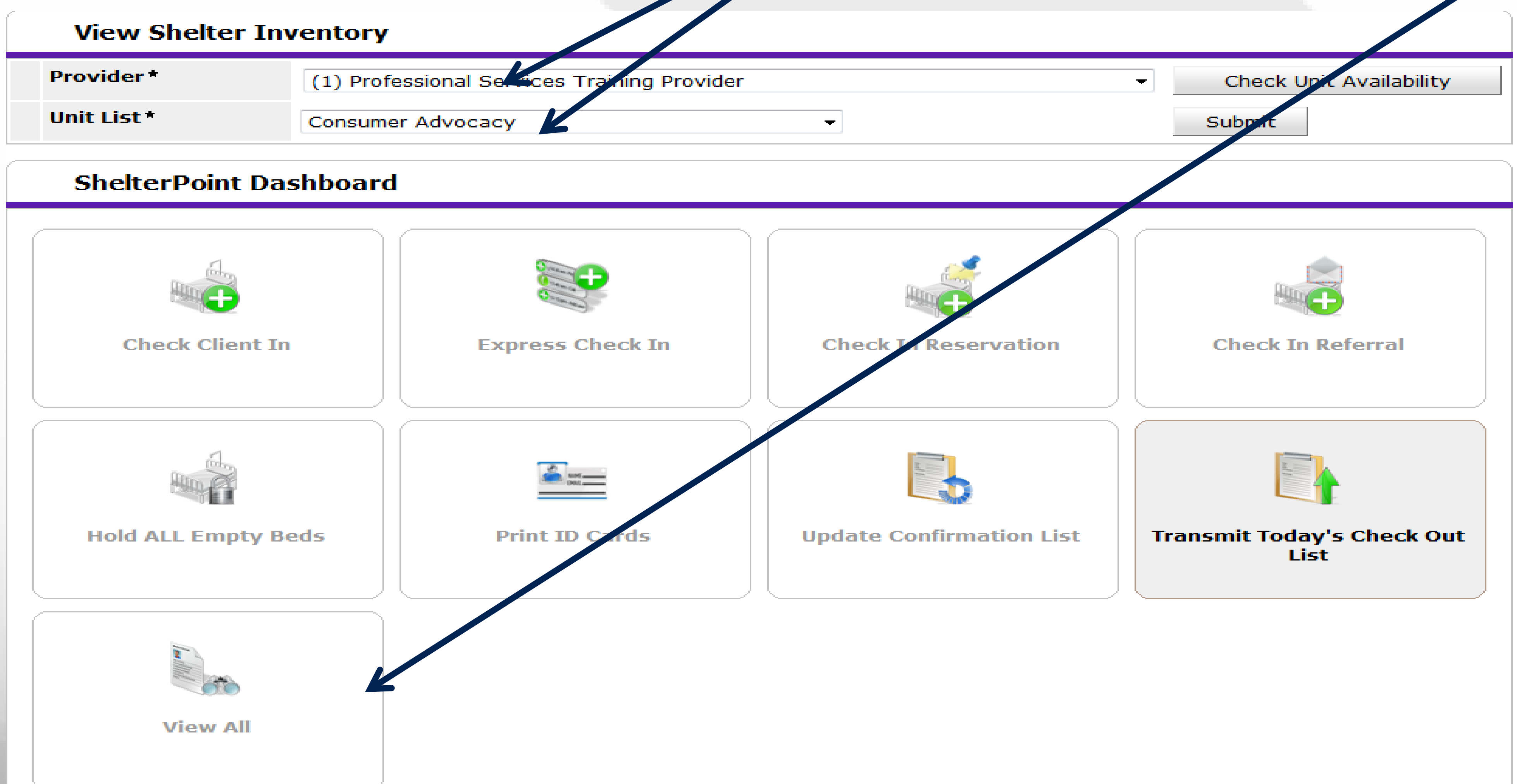
## Enter Individual

After Save and Exit is applied you will be exited to the ShelterPoint Dashboard. Here verify that the correct Provider and Unit list are still selected. To verify client(s) were checked select "View All."



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Enter Household

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# Enter a Household Into a unit

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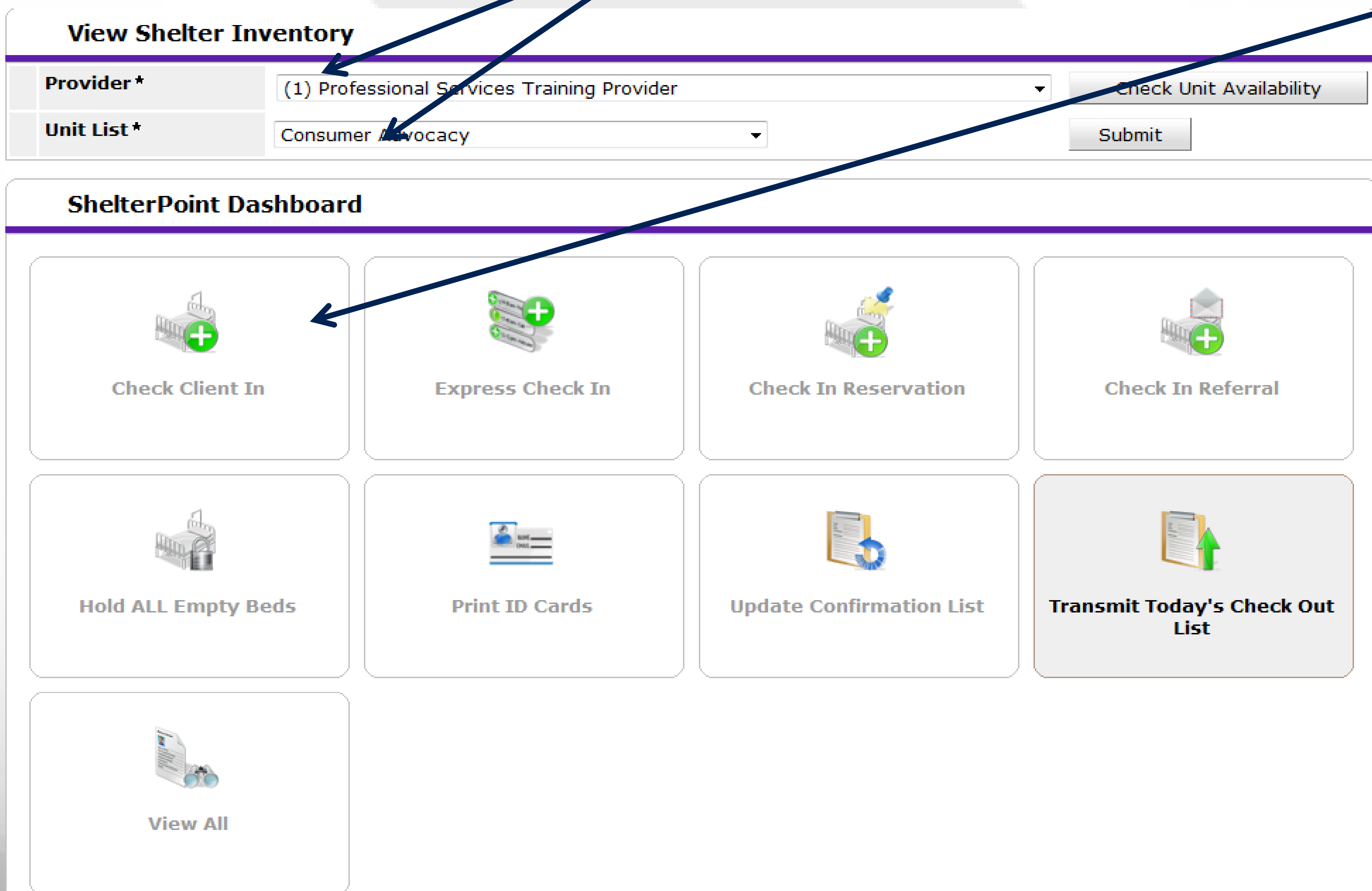
## Enter Household

Select the Provider and Unit List you wish to work with then click on "Check Client In"



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Enter Household

Once the “Check Client In” is selected the following unit list will appear.  From here click on the Check In icon or “Empty” unit.

**Shelter Inventory Information**

**Unit List - Abby's Training List**

**Display** All Beds **Sort By** Floor Ascending Sort

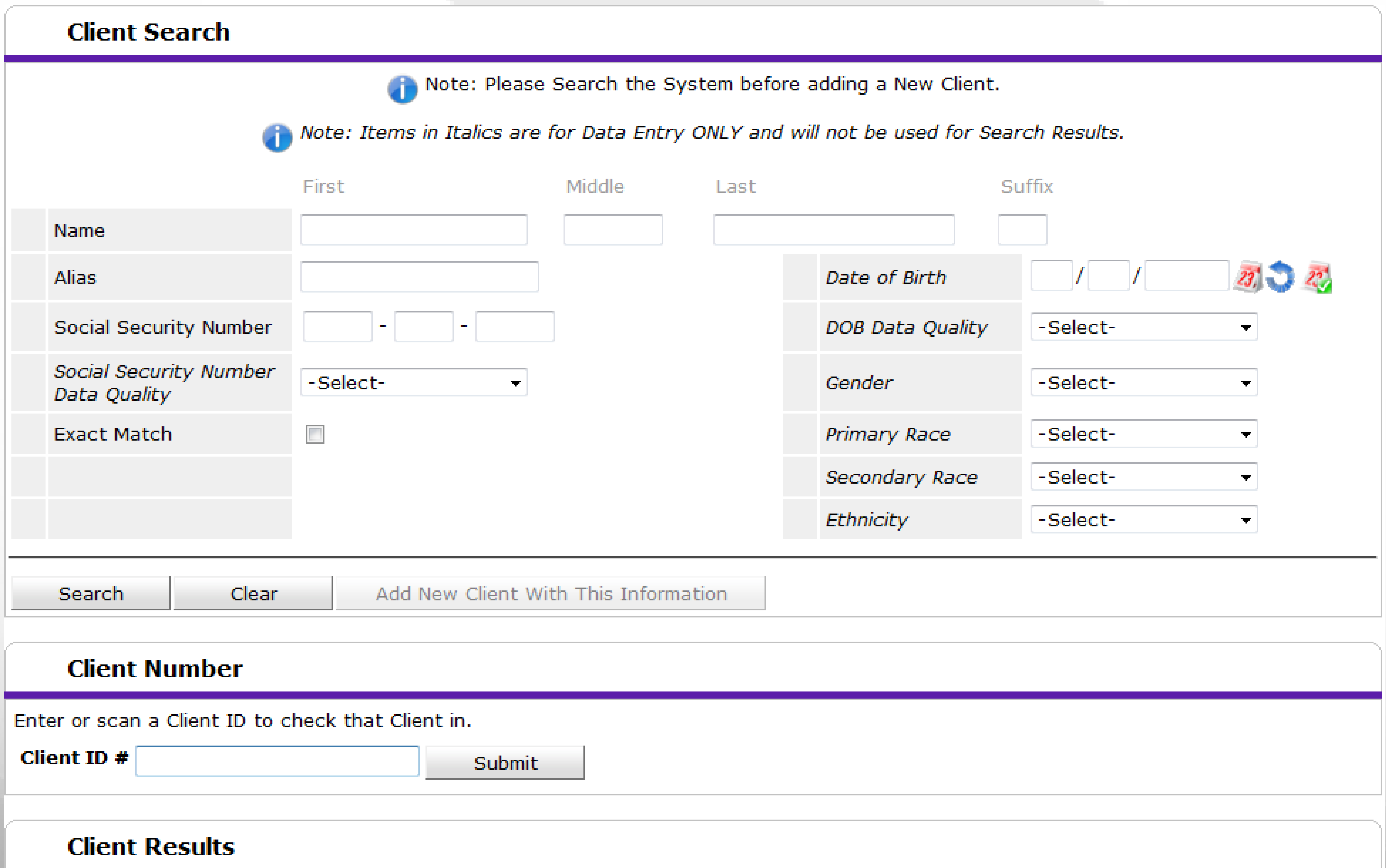
| | Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|---|---|---|---|---|---|---|---|---|---|---|
| | Main | West Wing | Bed 001 | | (11) Burgess, Abby | 03/09/1980 | Female | 653 | No | |
| | Main | West Wing | Bed 002 | | (12) Pickett, Ted | | | 653 | No | |
| | Main | West Wing | Bed 003 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 004 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 005 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 006 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 007 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 008 | Hold | EMPTY | | | | | |
| | Main | West Wing | Bed 009 | | (258) Penzes, Maria | | | | No | |
| | Main | West Wing | Bed 010 | | (199) Smurf, Papa | 10/04/1920 | Male | | No | |
| | | | Overflow (New) | | EMPTY | | | | | |

Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

Collaborate. Coordinate. Evaluate.

## Enter Household

**Perform a Client Search for the Head of Household and select the client from the Client Result area or add client. Client ID number can also be used.**



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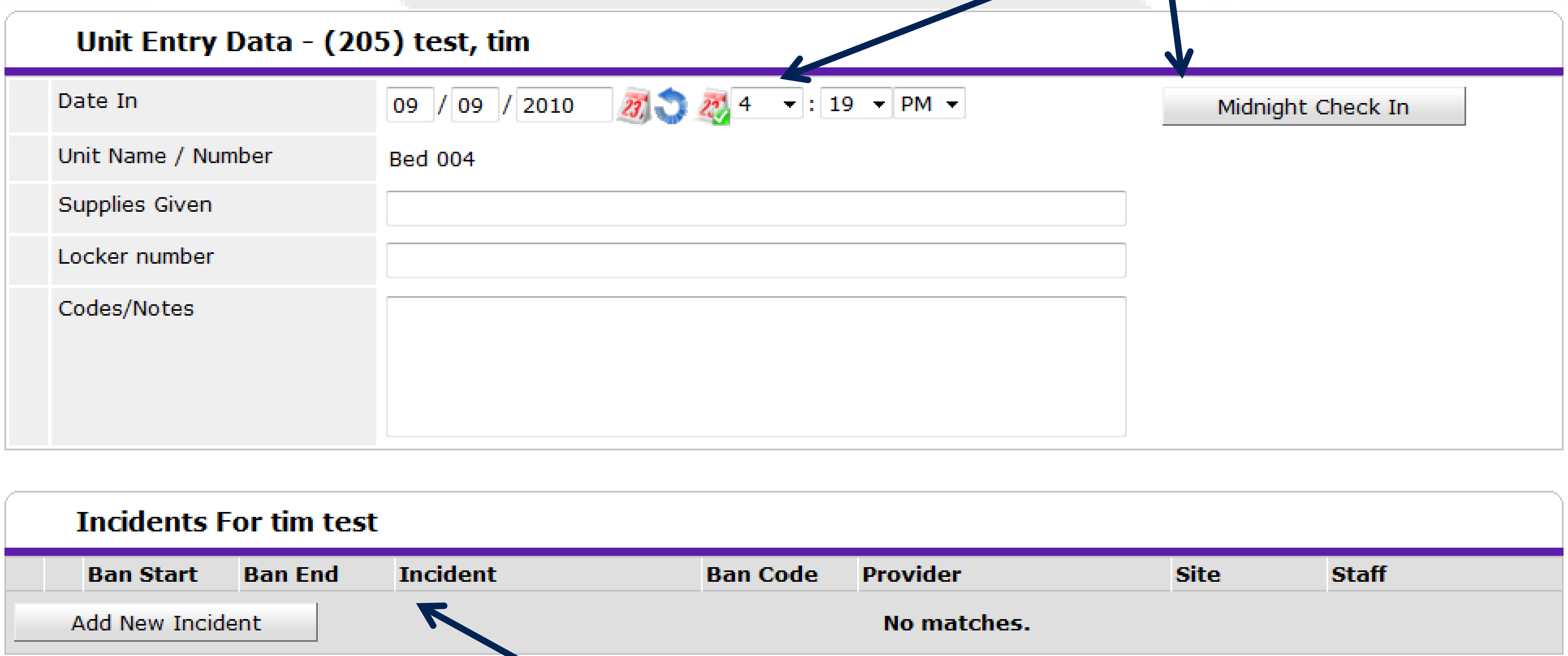
## Enter Household

Once a client is selected you will be able to change the time of Check In or select Midnight Check In as well as make additional notes.



**Unit Entry Data - (205) test, tim**

| | |
|---|---|
| Date In | 09 / 09 / 2010 4 : 19 PM — Midnight Check In |
| Unit Name / Number | Bed 004 |
| Supplies Given | |
| Locker number | |
| Codes/Notes | |

**Incidents For tim test**

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | No matches. | | | |

Verify that there are no incidents prohibiting the client entering shelter.

Collaborate. Coordinate. Evaluate.



# Enter Household

The next step is to verify the Household Information. From here you can make any adjustments (i.e. add, delete members) following the same procedure learned in ClientPoint.

**Households Overview**

| | | Type | | Count | Relationship | Date Entered | Date Removed | Head of Household | Monthly Income |
|---|---|---|---|---|---|---|---|---|---|
| | | Female Single Parent | H | 3 | | | | | |
| | | test, tim | | | Self | 04/22/2010 | | Yes | |
| | | test, kid | | | Son | 04/22/2010 | | No | |
| | | Test, Rob | | | Other non-relative | 09/09/2010 | | No | |

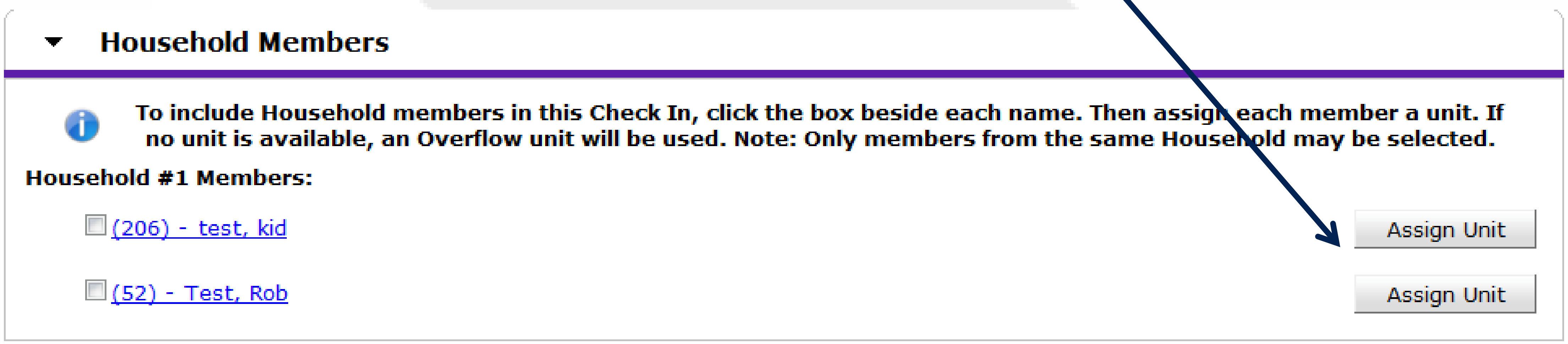
Search to Add this Client to an Existing Household | Start New Household

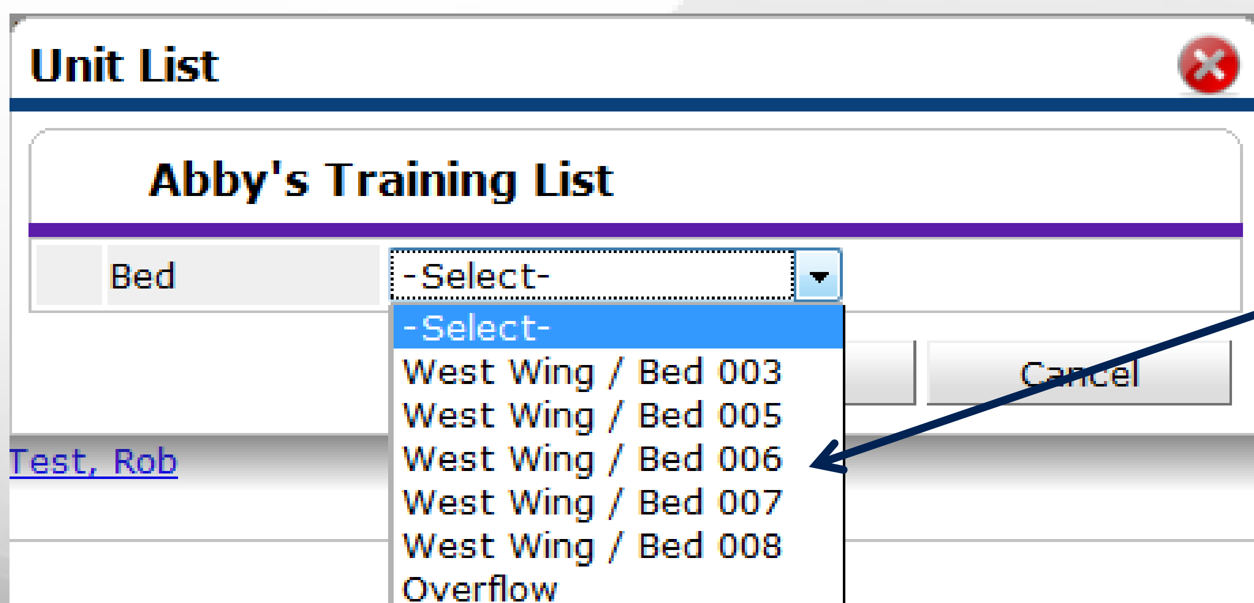
NOTE: The "Manage Households in the Check In process" must be set to use in your Admin Providers for this feature to be enabled!

Collaborate. Coordinate. Evaluate.

## Enter Household

Once the Household information is updated assign each Household member to a Unit by clicking on the “Assign Unit” button.




From the pop up screen select an Unit from the drop down list or select Overflow.

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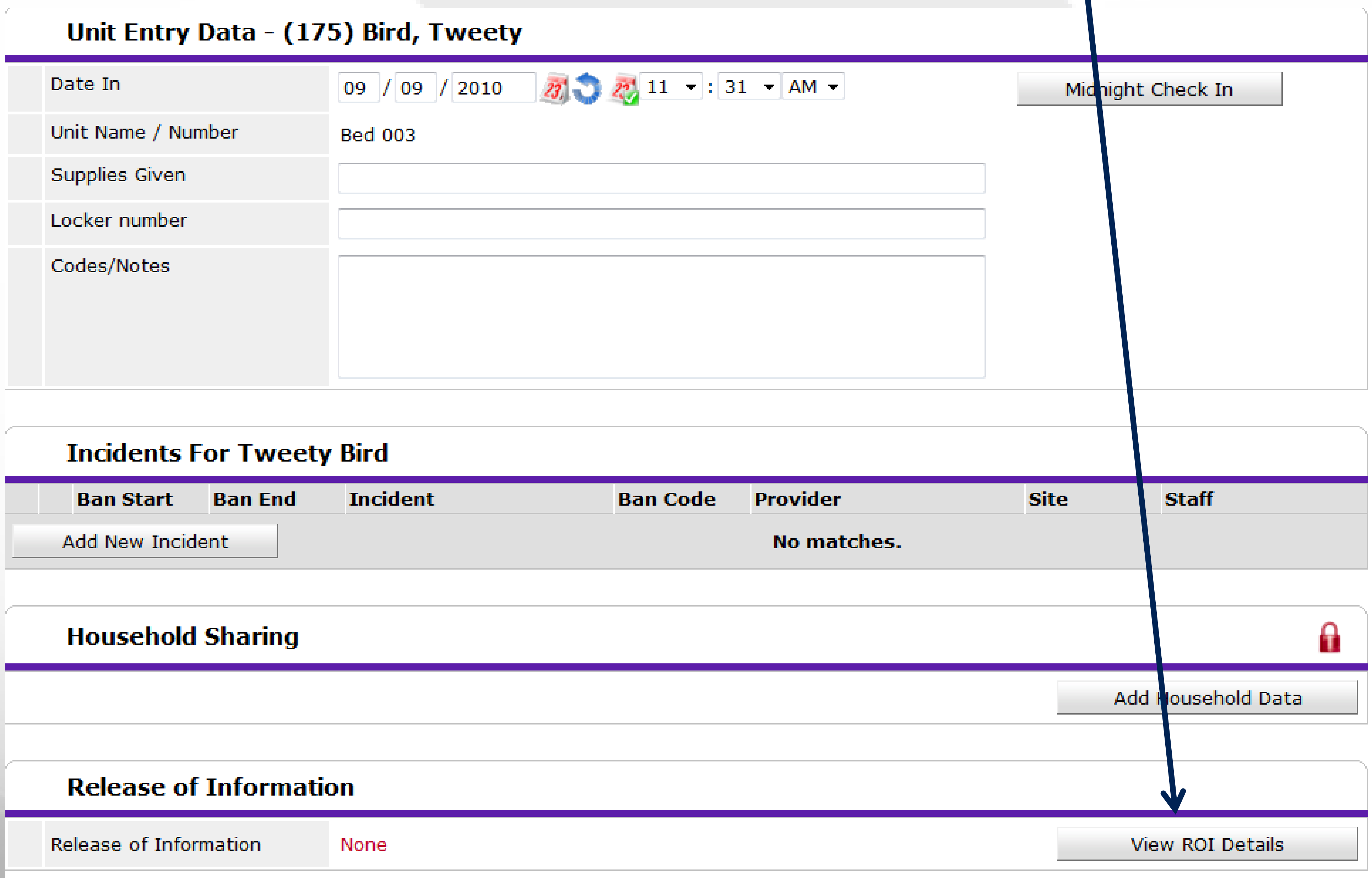
## Enter Household

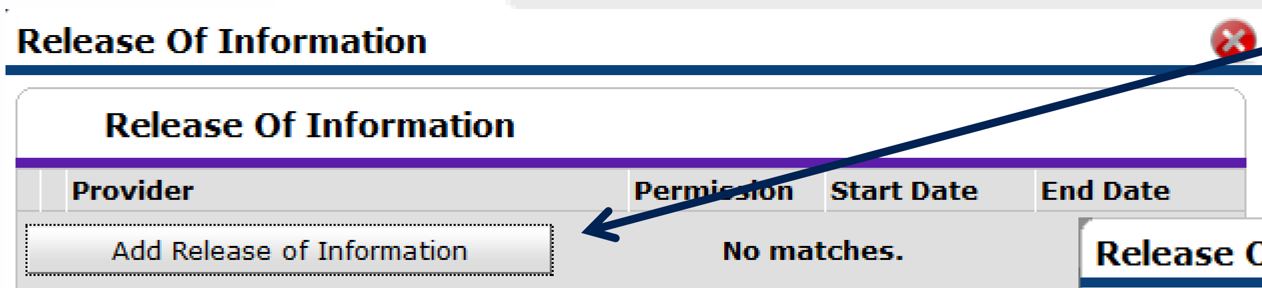
You will then enter the Release of Information if it is appropriate.



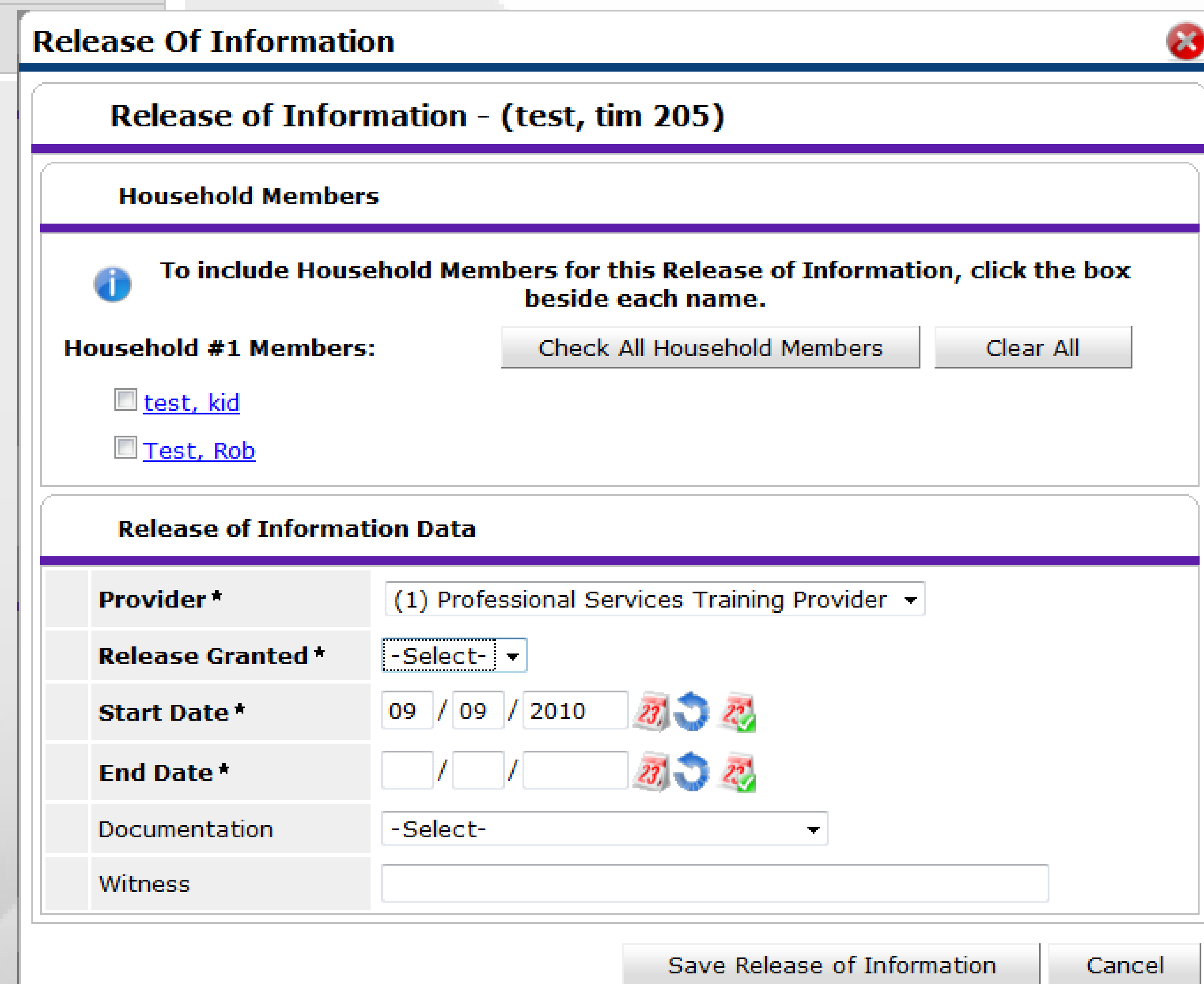
Collaborate. Coordinate. Evaluate.

Enter Household

In the pop up window click on "Add Release of Information"




Fill in the Release of Information and Save the Release of Information.



Collaborate. Coordinate. Evaluate.

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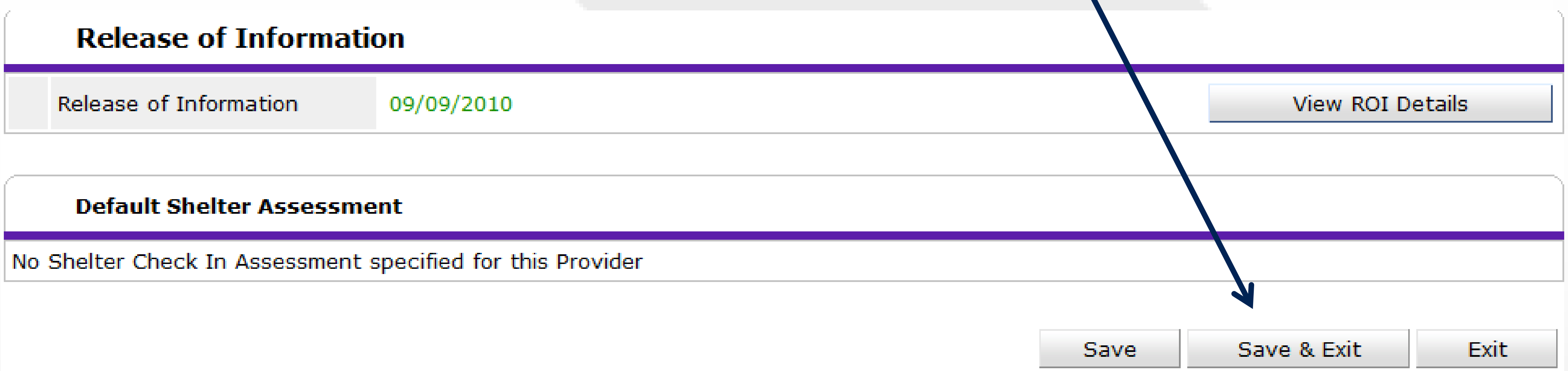
## Enter Household

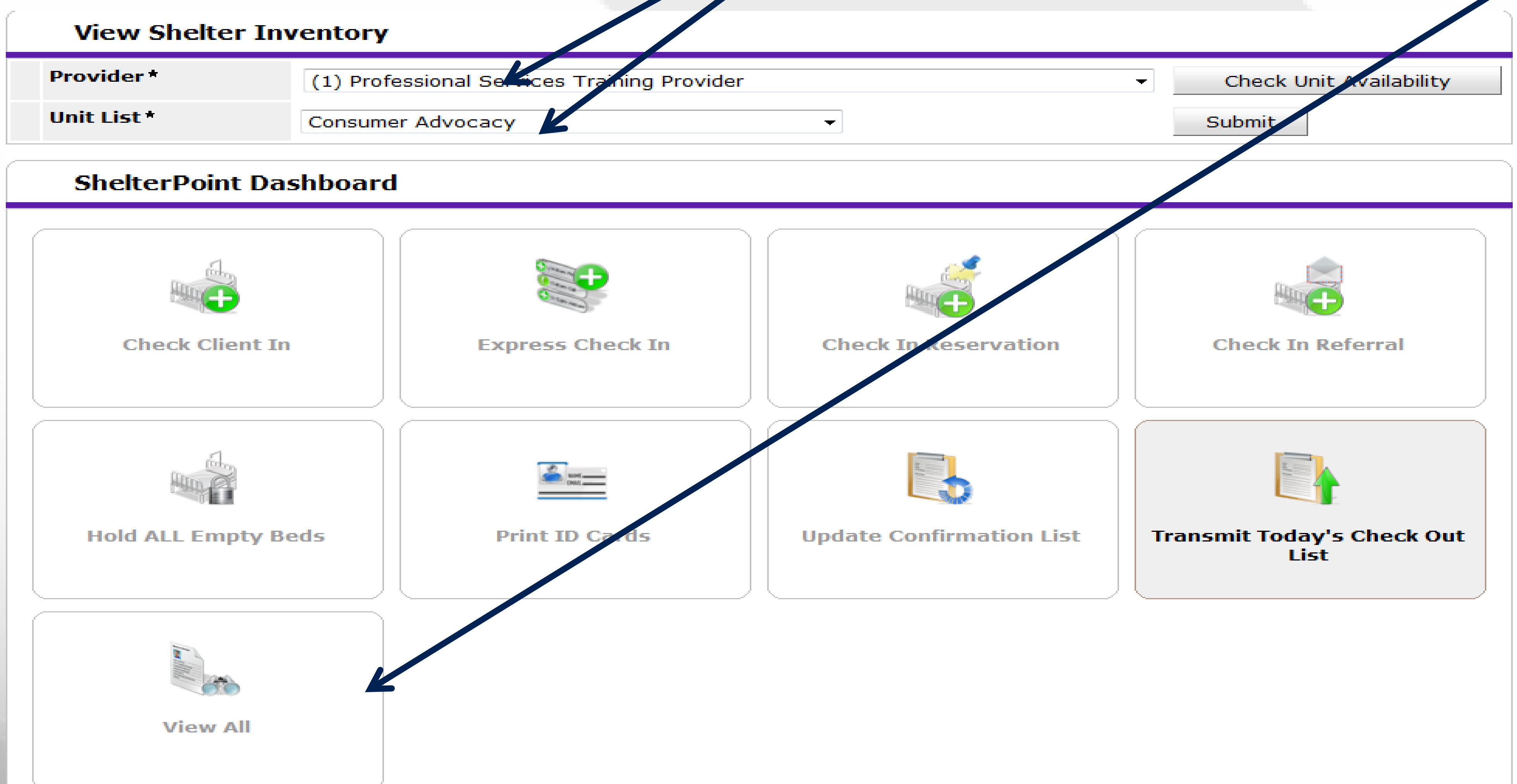
Once the Release of Information is finished and all relevant information is entered save your information at the bottom of the screen to enter you clients into the units.



Collaborate. Coordinate. Evaluate.

## Enter Household

After Save and Exit is applied you will be exited to the ShelterPoint Dashboard. Here verify that the correct Provider and Unit list are still selected. To verify client(s) were checked in select “View All.”



# Express Check In

NOTE: Express Check In must be set to "Yes" in the Admin Providers Section.

Express Check In is a feature that allows a group of clients to be quickly checked in at once. Information that is filled in here will apply to all clients that are checked in using this feature.

Collaborate. Coordinate. Evaluate.

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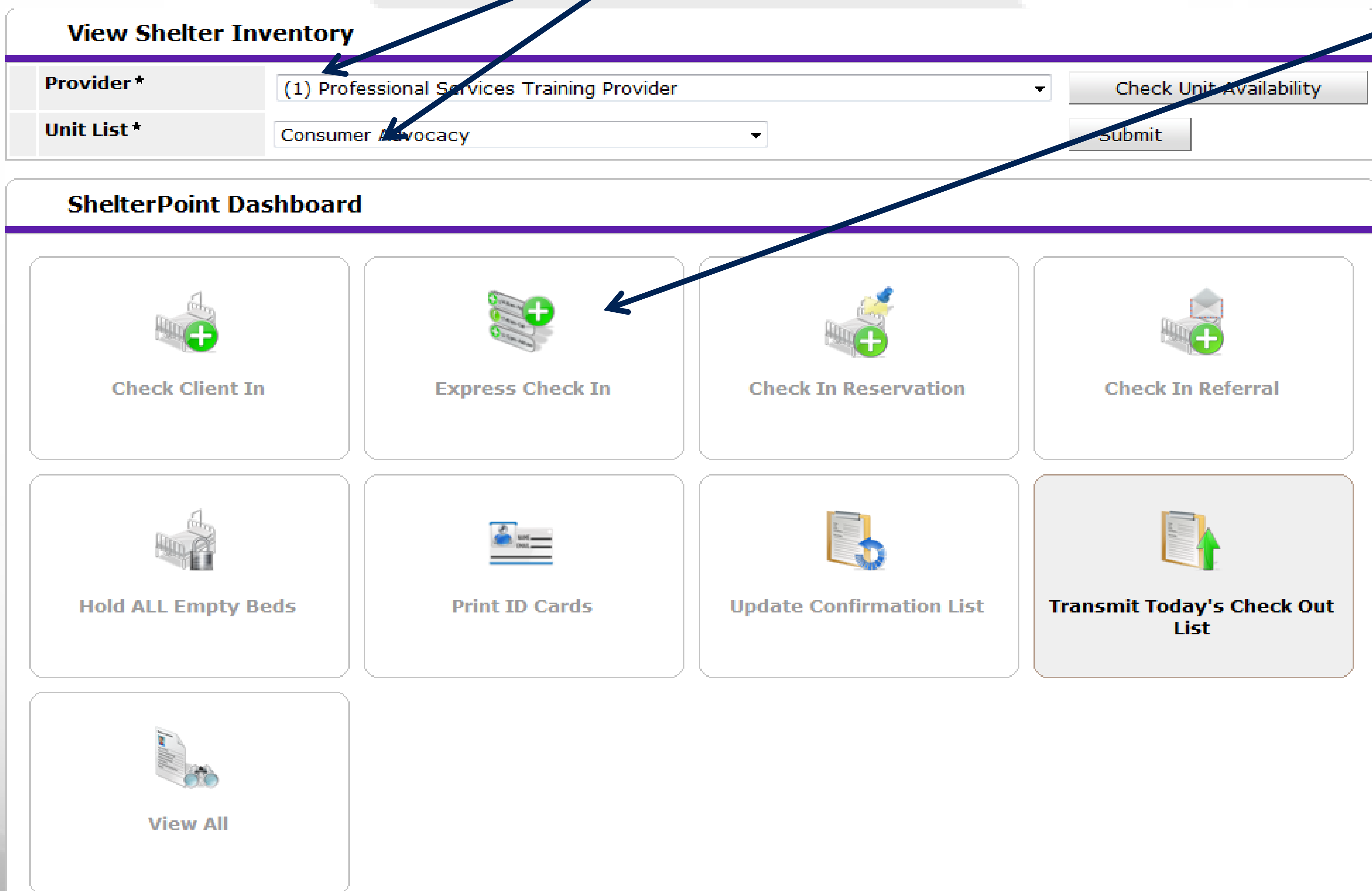
# Express Check In

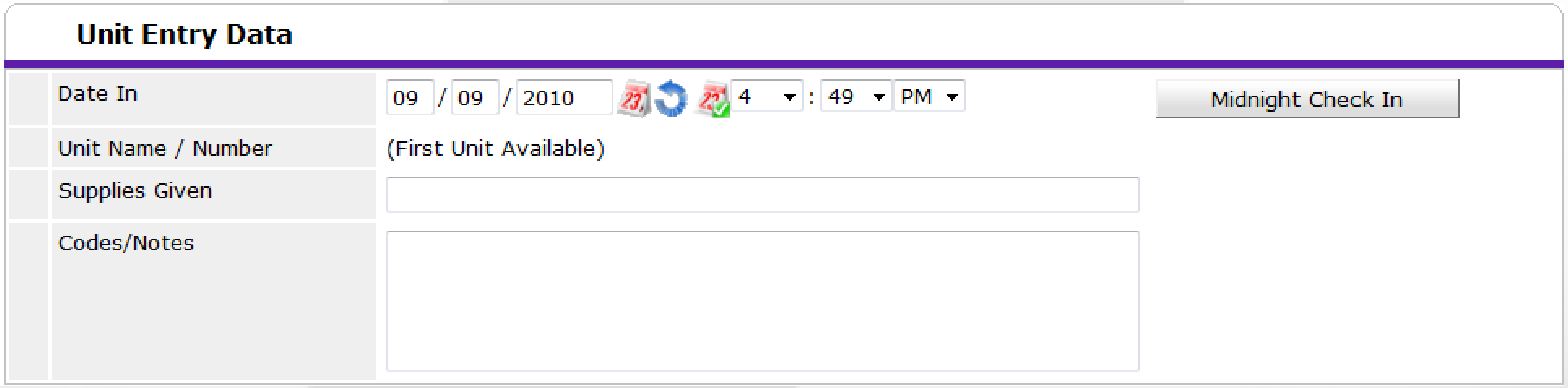
Select the Provider and Unit List you wish to work with then click on "Express Check In"



Collaborate. Coordinate. Evaluate.

## Express Check In

First fill in the Date in and determine the time of check in or select Midnight Check Ion. Client will be assigned to the first available unit rather then Case Managers selecting which unit to put them in. Fill in the Supplies Given and Notes section as appropriate.



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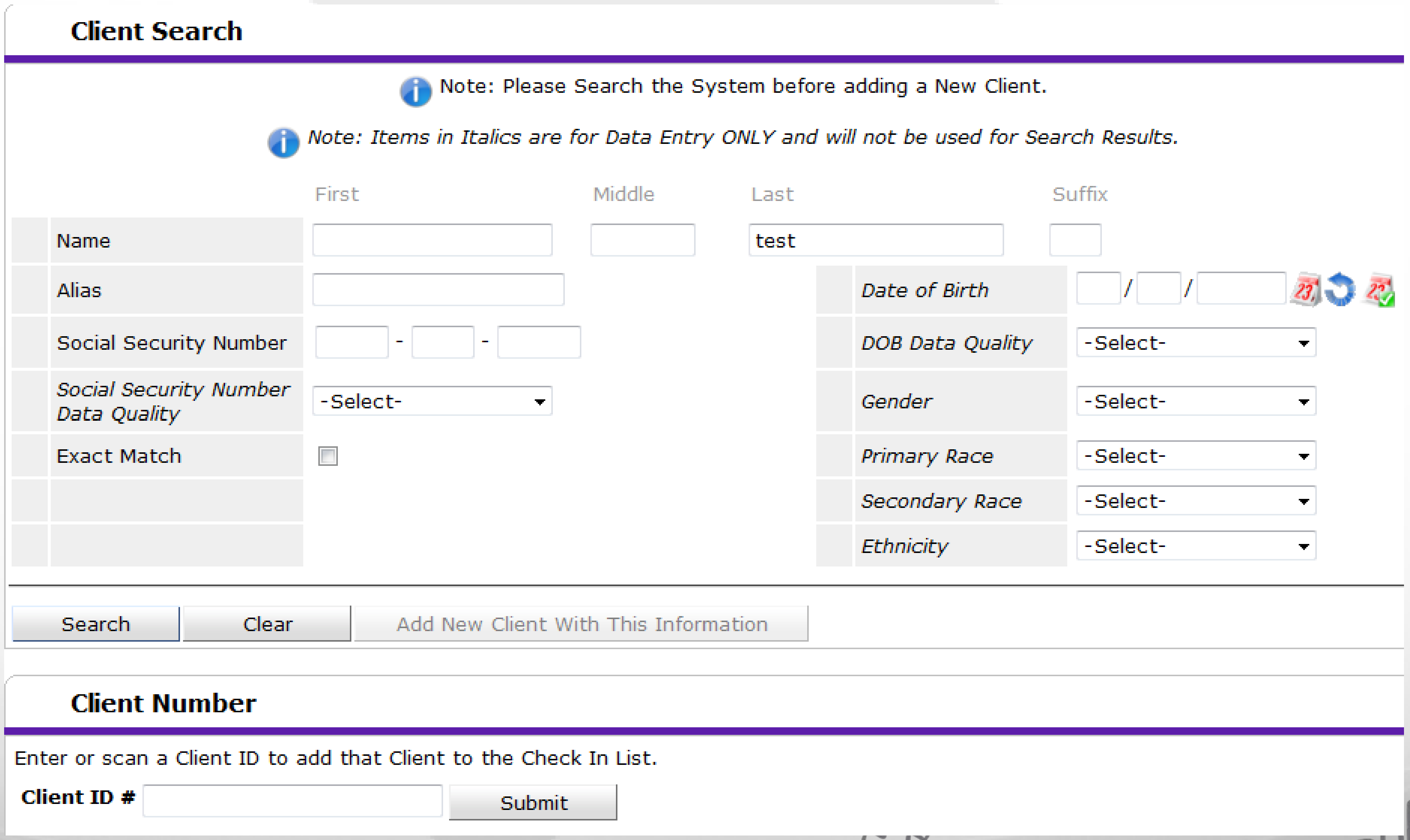
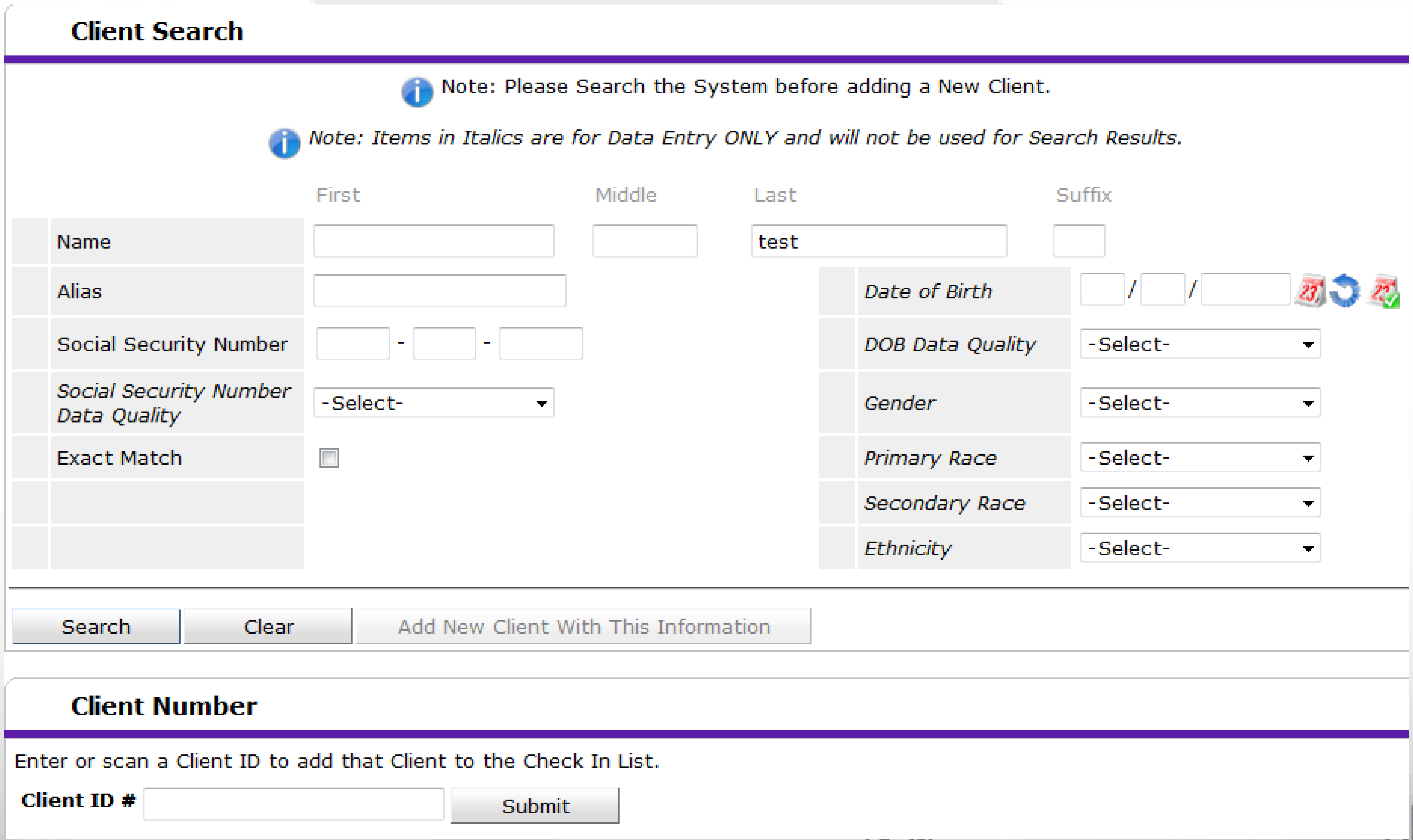
## Express Check In

Perform a Client Search for the Head of Household and select the client from the Client Result area or add client.  Client ID number can also be used.



## Express Check In

Perform a Client Search for the Head of Household and select the client from the Client Result area or add client. Client ID number can also be used.



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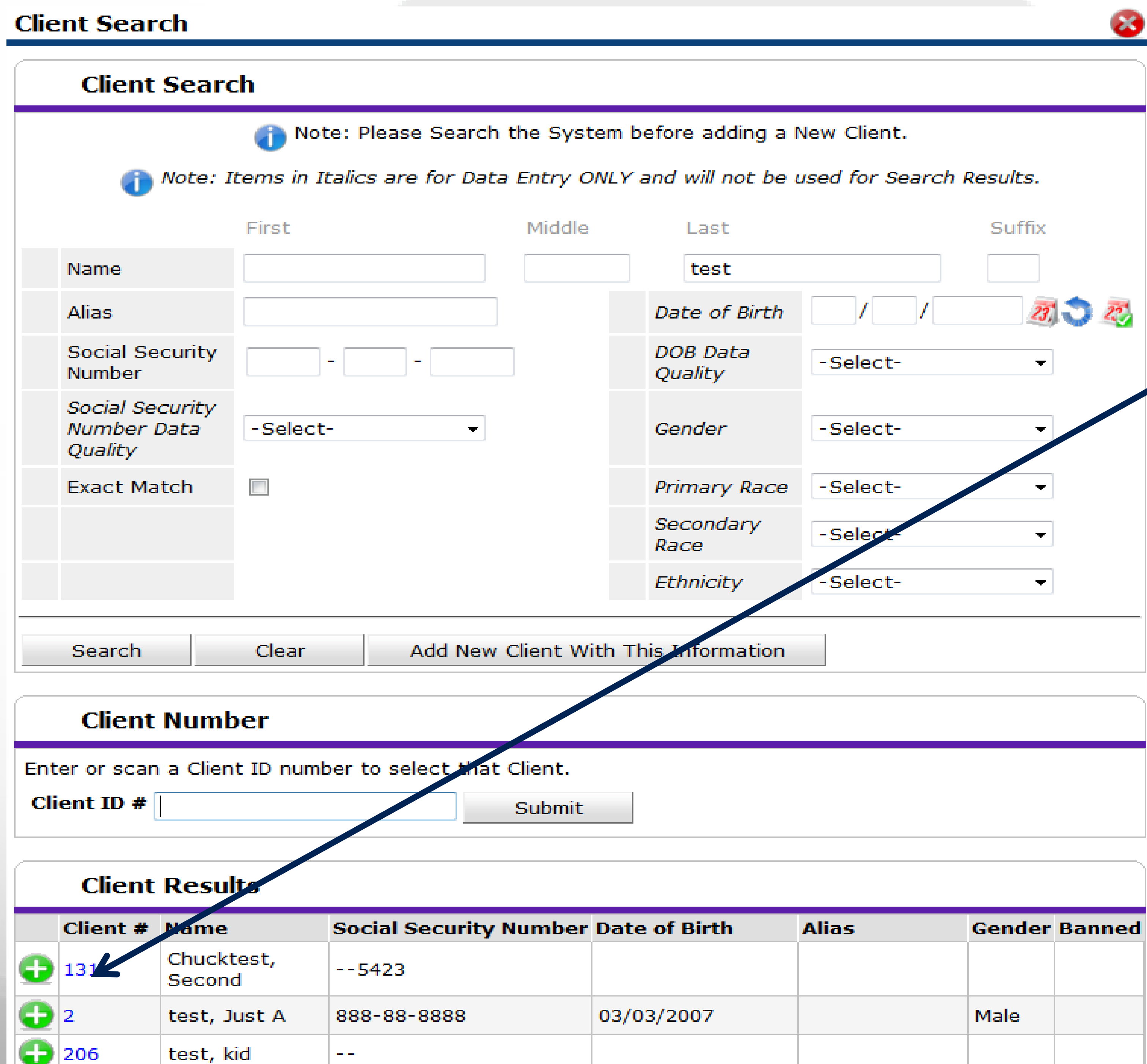
# Express Check In




If Client Search feature is used a pop up window will appear with the search results. Select the appropriate client by clicking on the add Icon. From this screen you can perform searches for additional clients. When finished select "Exit" at the bottom of the pop up screen

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# Express Check In

If Client ID number is entered the client will appear on the Express Check In List. You can add multiple clients if the Client ID number is known. Note: The incident box in this case lets you view and/or add to the last client added only.

**Client Number**

Enter or scan a Client ID to add that Client to the Check In List.

**Client ID #** 13 Submit

**Express Check In List**

**Incidents for Last Added, Bumblebee Test (422)**

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | | No matches. | | |

**Express Check In List**

| | Name | Date of Birth | Alias |
|---|---|---|---|
| | (2) test, Just | | |
| | (422) Test, Bumblebee | | |

Remove Last Entry Clear List Submit List Exit

# Express Check In

Final Express Check In Features:

- Remove Last Entry – will remove the last client added
- Clear List – will clear the entire list
- Submit List – will submit the list and assign all clients to a unit and exit to the ShelterPoint Dashboard
- Exit – will exit to the ShelterPoint Dashboard without assigning units.

**Express Check In List**

| Name | Date of Birth | Alias |
|---|---|---|
| (2) test, Just | | |
| (422) Test, Bumblebee | | |

Remove Last Entry | Clear List | Submit List | Exit

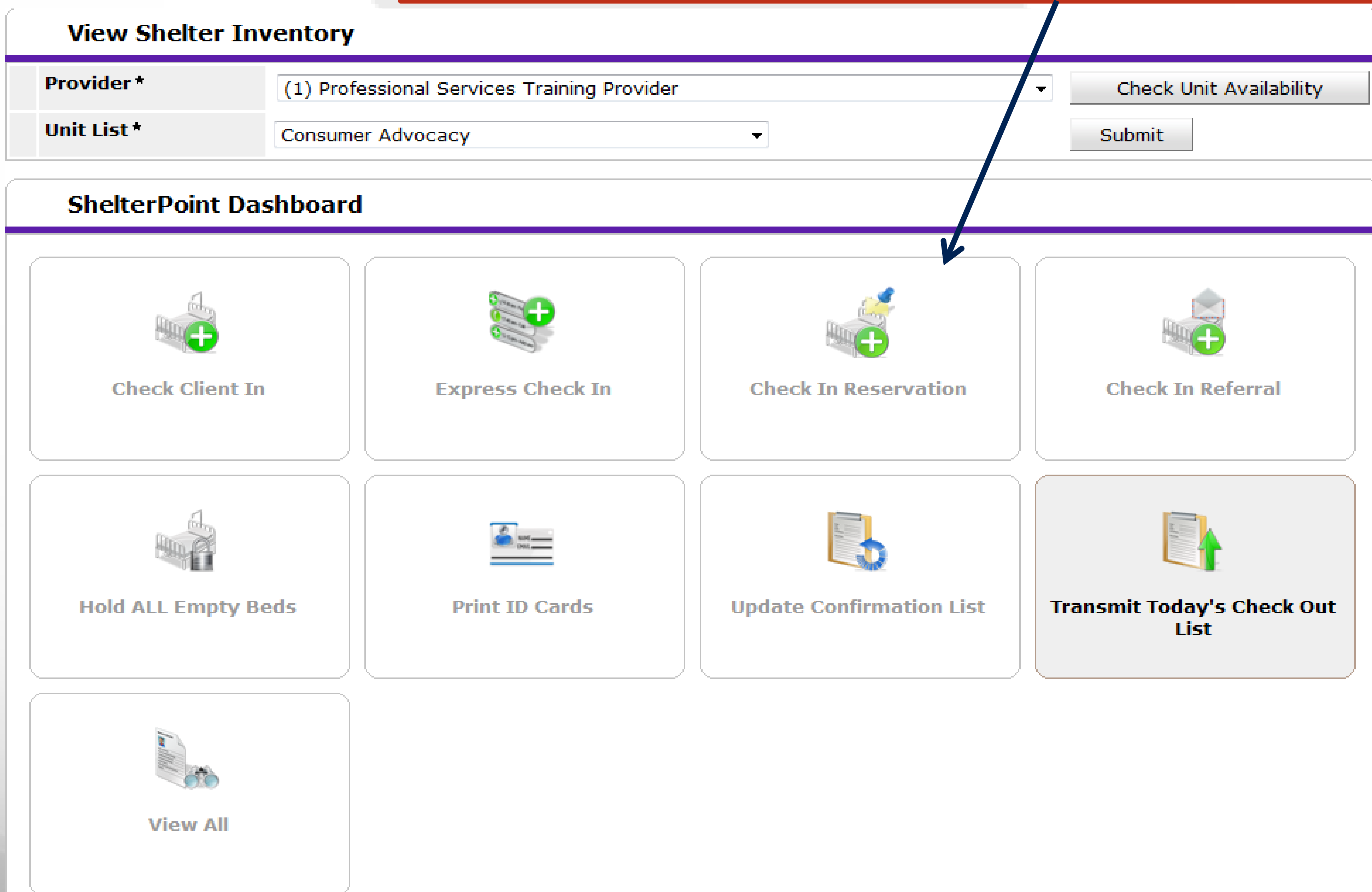
# Check in Reservation

NOTE: Check In Reservation is a feature that must be turned on in the Admin Providers section.

Collaborate. Coordinate. Evaluate.

## Reservations

Reservations allow a Unit to be reserved for a client that will be showing up in the future. First click on Check in Reservation.




NOTE: Check In Reservation is a feature that must be turned on in the Admin Providers section.

# Reservations

Reservations will show up under the Unit list. To add a reservation click on “Add Reservation.”

**Shelter Inventory Information**

**Unit List - Abby's Training List**

Display All Beds Sort By Floor Ascending Sort

| Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|---|---|---|---|---|---|---|---|---|---|
| Main | West Wing | Bed 001 | | (11) Burgess, Abby | 03/09/1980 | Female | 653 | No | |
| Main | West Wing | Bed 002 | | (12) Pickett, Ted | | | 653 | No | |
| Main | West Wing | Bed 003 | Hold | EMPTY | | | | | |
| Main | West Wing | Bed 004 | | (205) test, tim | 04/15/1977 | | | No | |
| Main | West Wing | Bed 005 | Hold | EMPTY | | | | | |
| Main | West Wing | Bed 006 | Hold | EMPTY | | | | | |
| Main | West Wing | Bed 007 | | (432) Test, Bumblebee | | | | No | |
| Main | West Wing | Bed 008 | | (2) Test, Just | 03/03/2007 | Male | | No | |
| Main | West Wing | Bed 009 | | (258) Penzes, Maria | | | | No | |
| Main | West Wing | Bed 010 | | (199) Smurf, Papa | 10/04/1920 | Male | | No | |
| | | Overflow (New) | | EMPTY | | | | | |

Start Express Check In Hold ALL Empty Units Release ALL HELD Units

**Reservations for Unit List - Abby's Training List**

| Arrival Date | Client | Date of Birth | Gender | Group ID |
|---|---|---|---|---|

Add Reservation No matches.

# Reservations

The Client Search screen will pop up. Search for the client or enter the Client ID Number.

### Client Search

Note: Please Search the System before adding a New Client.

*Note: Items in Italics are for Data Entry ONLY and will not be used for Search Results.*

| | First | Middle | Last | Suffix |
|---|---|---|---|---|
| Name | | | test | |

| | | | |
|---|---|---|---|
| Alias | | *Date of Birth* | / / |
| Social Security Number | - - | *DOB Data Quality* | -Select- |
| *Social Security Number Data Quality* | -Select- | *Gender* | -Select- |
| Exact Match | ☐ | *Primary Race* | -Select- |
| | | *Secondary Race* | -Select- |
| | | *Ethnicity* | -Select- |

Search | Clear | Add New Client With This Information

### Client Number

Enter or scan a Client ID to add that Client to the Check In List.

**Client ID #** Submit

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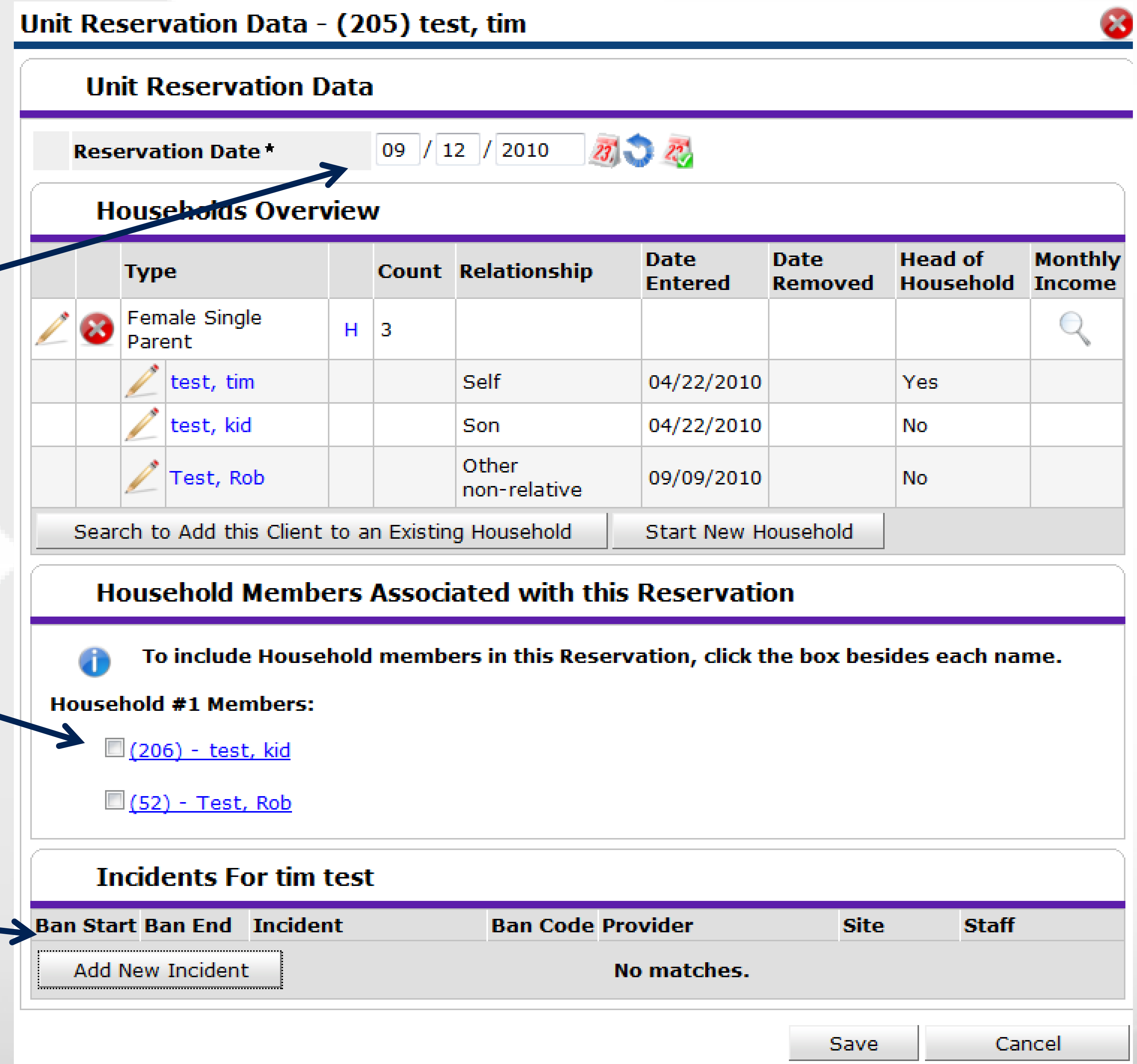
# Reservations

First Enter the Reservation Date and enter the appropriate date.

If needed select additional Household members.

Incidents can also be reviewed on the client.


Unit Reservation Data - (205) test, tim

**Unit Reservation Data**

Reservation Date * 09 / 12 / 2010

**Households Overview**

| | | Type | | Count | Relationship | Date Entered | Date Removed | Head of Household | Monthly Income |
|---|---|---|---|---|---|---|---|---|---|
| | | Female Single Parent | H | 3 | | | | | |
| | | test, tim | | | Self | 04/22/2010 | | Yes | |
| | | test, kid | | | Son | 04/22/2010 | | No | |
| | | Test, Rob | | | Other non-relative | 09/09/2010 | | No | |

Search to Add this Client to an Existing Household | Start New Household

**Household Members Associated with this Reservation**

To include Household members in this Reservation, click the box besides each name.

**Household #1 Members:**

- [ ] (206) - test, kid
- [ ] (52) - Test, Rob

**Incidents For tim test**

| Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|
| Add New Incident | | | | No matches. | | |

Save | Cancel

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# Reservations

Now the reservation has been made. From here case managers can:

1. Delete the reservation if is was made in error.
2. Check client(s) in if it is the arrival date.
3. Cancel Reservation.

**Reservations for Unit List - Abby's Training List**

| | | Arrival Date | Client | Date of Birth | Gender | Group ID | |
|---|---|---|---|---|---|---|---|
| | | 09/12/2010 | test, kid | | | 1405 | Cancel Reservation |
| | | 09/12/2010 | test, tim | 04/15/1977 | | 1405 | Cancel Reservation |

Add Reservation

**Showing 1-2 of 2**

**Unit Reservation Data - (205) test, tim**

**Cancel Bed Reservation**

**Reason need was not met*** -Select-

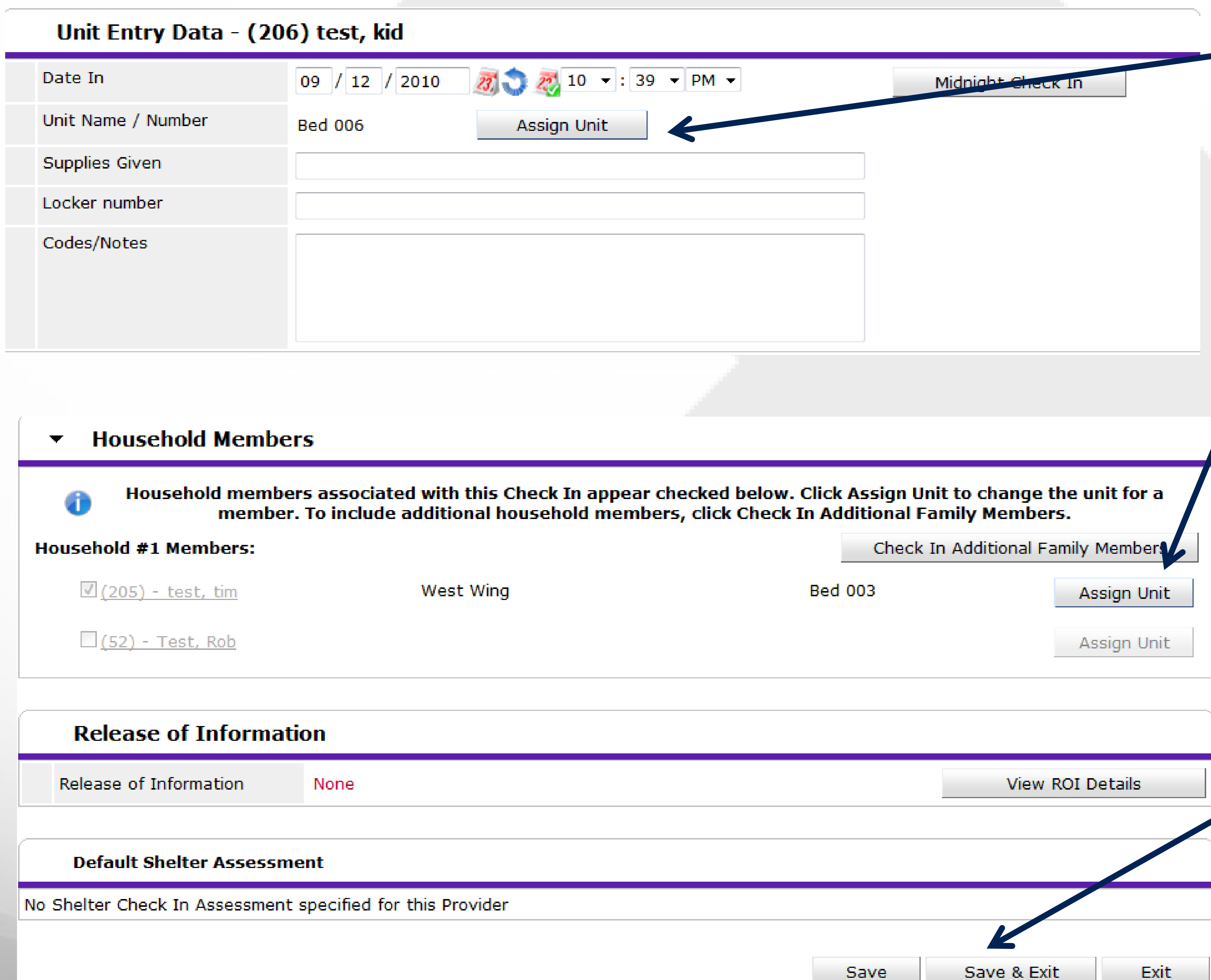
- -Select-
- All Services Full
- Client Not Eligible
- Client Refused Service
- Service Does Not Exist
- Service Not Accessible

Cancel

| Referral Date | Name | Need | | Referred By |
|---|---|---|---|---|

Collaborate. Coordinate. Evaluate.

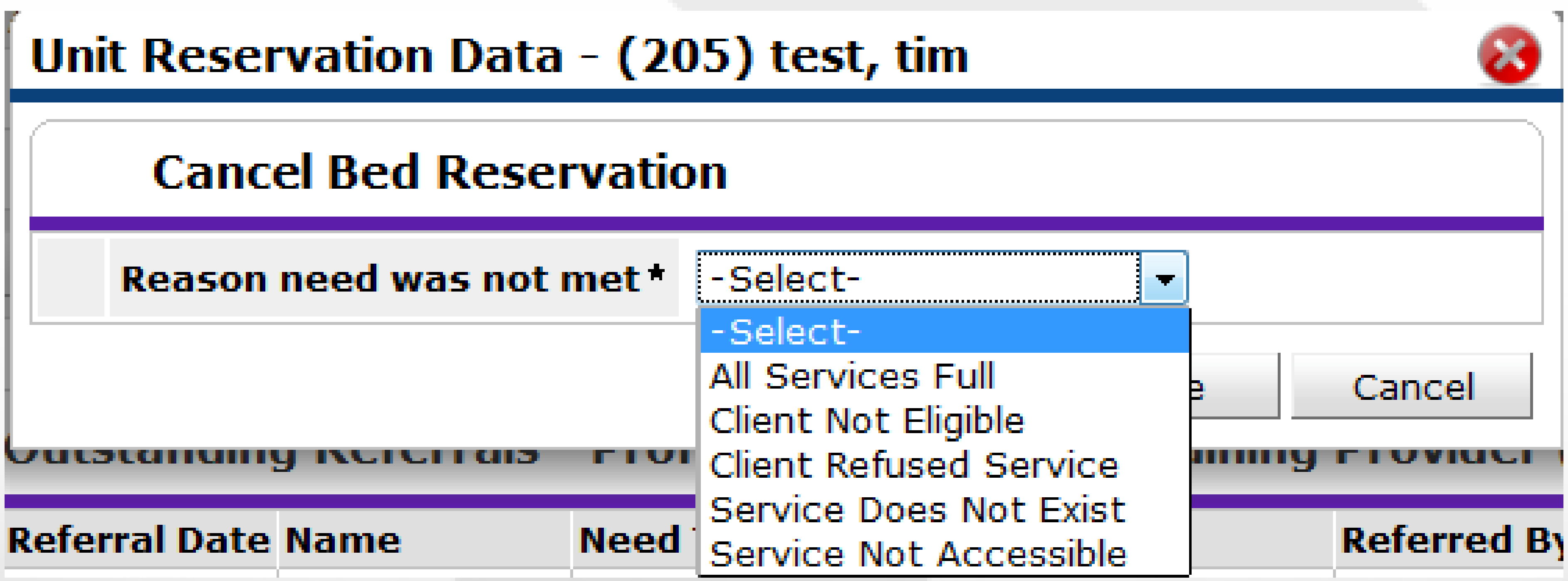
# Reservations




If Check In is selected case managers will need to assign the appropriate unit for the client and household members if any are attached. If a unit is not assigned the client will be checked into an overflow unit. Save the changes once the units have been assigned and a Release of Information is entered if needed.

# Reservations

If cancel reservation is selected the case manager will need to select the appropriate reason for the cancellation.



Collaborate. Coordinate. Evaluate.

Referrals

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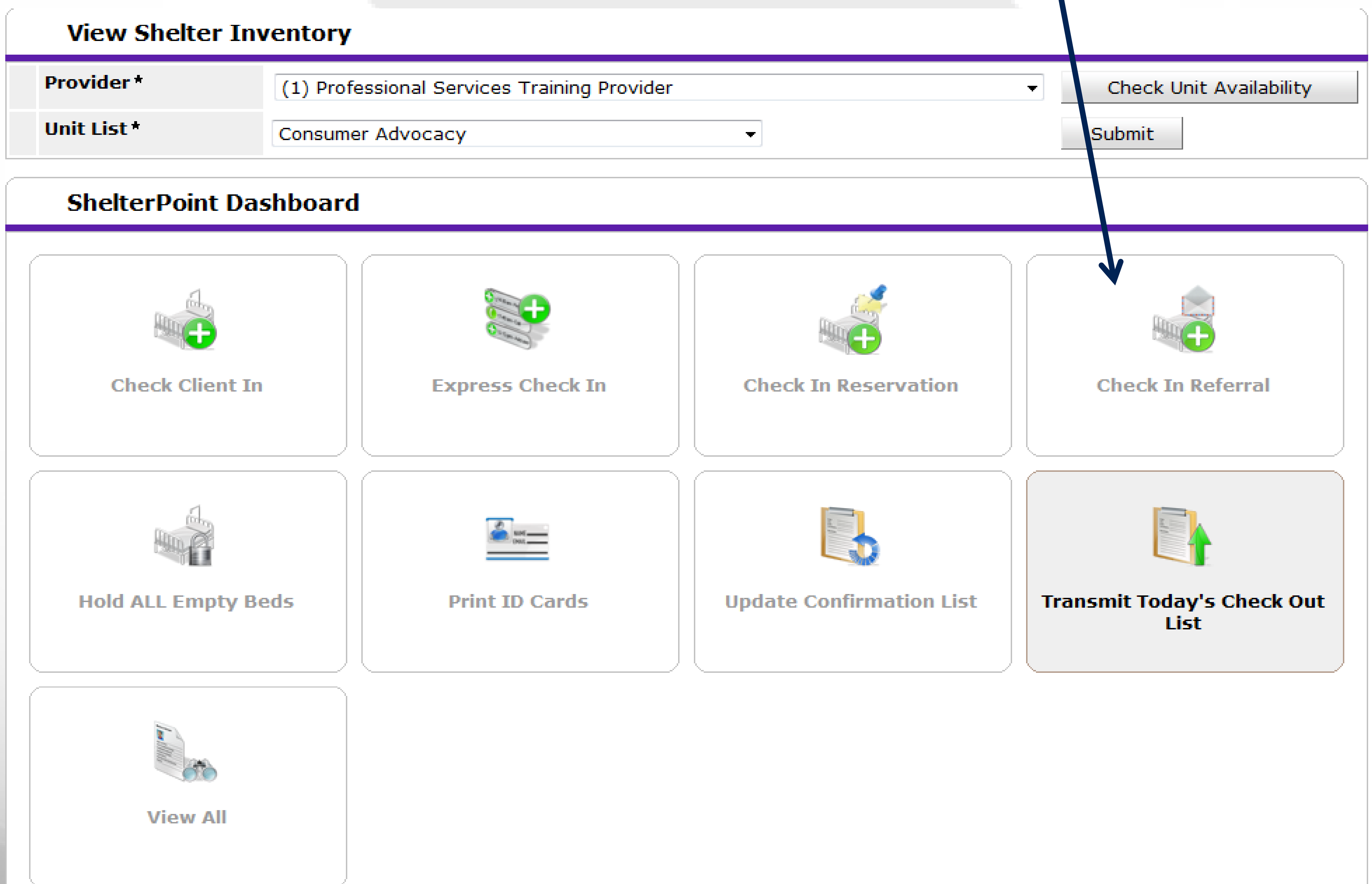
# Check in Referrals

Collaborate. Coordinate. Evaluate.

## Referrals

Check in Referral allows case managers to check in referrals made by other providers.



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# Referrals

Once Check In Referral button is clicked scroll to the bottom of the Unit Inventory Screen. Outstanding Referrals will show up here. Options that are available here are:

- Edit Referral
- Check In Referral
- Transfer to clients ClientPoint Profile by clicking on the client name

**Outstanding Referrals - Professional Services Training Provider (1)**

| | | Referral Date | Name | Need Type | Referred By | Date of Birth | Gender | Group ID |
|---|---|---|---|---|---|---|---|---|
| | | 06/03/2010 | (11) - Burgess, Abby | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | 03/09/1980 | Female | 546 |
| | | 06/22/2010 | (332) - Burgess, Ted | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | | | 807 |
| | | 06/22/2010 | (11) - Burgess, Abby | Database Development/Maintenance Assistance | Professional Services Training Provider (1) | 03/09/1980 | Female | 807 |
| | | 06/22/2010 | (11) - Burgess, Abby | Database Creation/Management Software Selection | Professional Services Training Provider (1) | 03/09/1980 | Female | 805 |
| | | 06/22/2010 | (332) - Burgess, Ted | Database Creation/Management Software Selection | Professional Services Training Provider (1) | | | 805 |

**Showing 1-5 of 5**

Collaborate. Coordinate. Evaluate.

BOWMAN systems

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# Referrals

Edit Referral will let case managers Edit Referral Data.

## Edit Referral Data

### Overview

| Client ID | Client Name | Referral Date | Referring Provider | Reason Canceled |
|---|---|---|---|---|
| 11 | Burgess, Abby | 06/03/2010 | Professional Services Training Provider (1) | |

**Showing 1-1 of 1**

### Referral Data - (11) Burgess, Abby

| | |
|---|---|
| Referral Date | 06/03/2010 |
| Referring Provider | (1) Professional Services Training Provider |
| Referred To | (1) Professional Services Training Provider |
| If needed, Referral Projected Follow Up Date | / / |
| Referral Follow Up User | (1) Professional Services Training Provider<br>-Select- |
| Referral Follow Up Made | -Select- |
| Referral Completed Follow Up Date | / / |
| If Referral Canceled, Reason | -Select- |

### Household Members

**No Household Members were found.**

Save Referral Information Cancel

Collaborate. Coordinate. Evaluate.

BOWMAN systems

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# Referrals

**Unit Entry Data - (206) test, kid**

| | |
|---|---|
| Date In | 09 / 12 / 2010  10 : 39 PM  Midnight Check In |
| Unit Name / Number | Bed 006  Assign Unit |
| Supplies Given | |
| Locker number | |
| Codes/Notes | |

**Household Members**

**Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.**

**Household #1 Members:**  Check In Additional Family Members

| | | | |
|---|---|---|---|
| (205) - test, tim | West Wing | Bed 003 | Assign Unit |
| (52) - Test, Rob | | | Assign Unit |

**Release of Information**

| | | |
|---|---|---|
| Release of Information | None | View ROI Details |

**Default Shelter Assessment**

No Shelter Check In Assessment specified for this Provider

Save  Save & Exit  Exit

If Check In is selected case managers will need to assign the appropriate unit for the client and household members if any are attached. If a unit is not assigned the client will be checked into an overflow unit. Save the changes once the units have been assigned and a Release of Information is entered if needed.

Collaborate. Coordinate. Evaluate.

Confirmation & Check Out List

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# Update Confirmation Lists & Transmit Today's Check Out List

Collaborate. Coordinate. Evaluate.

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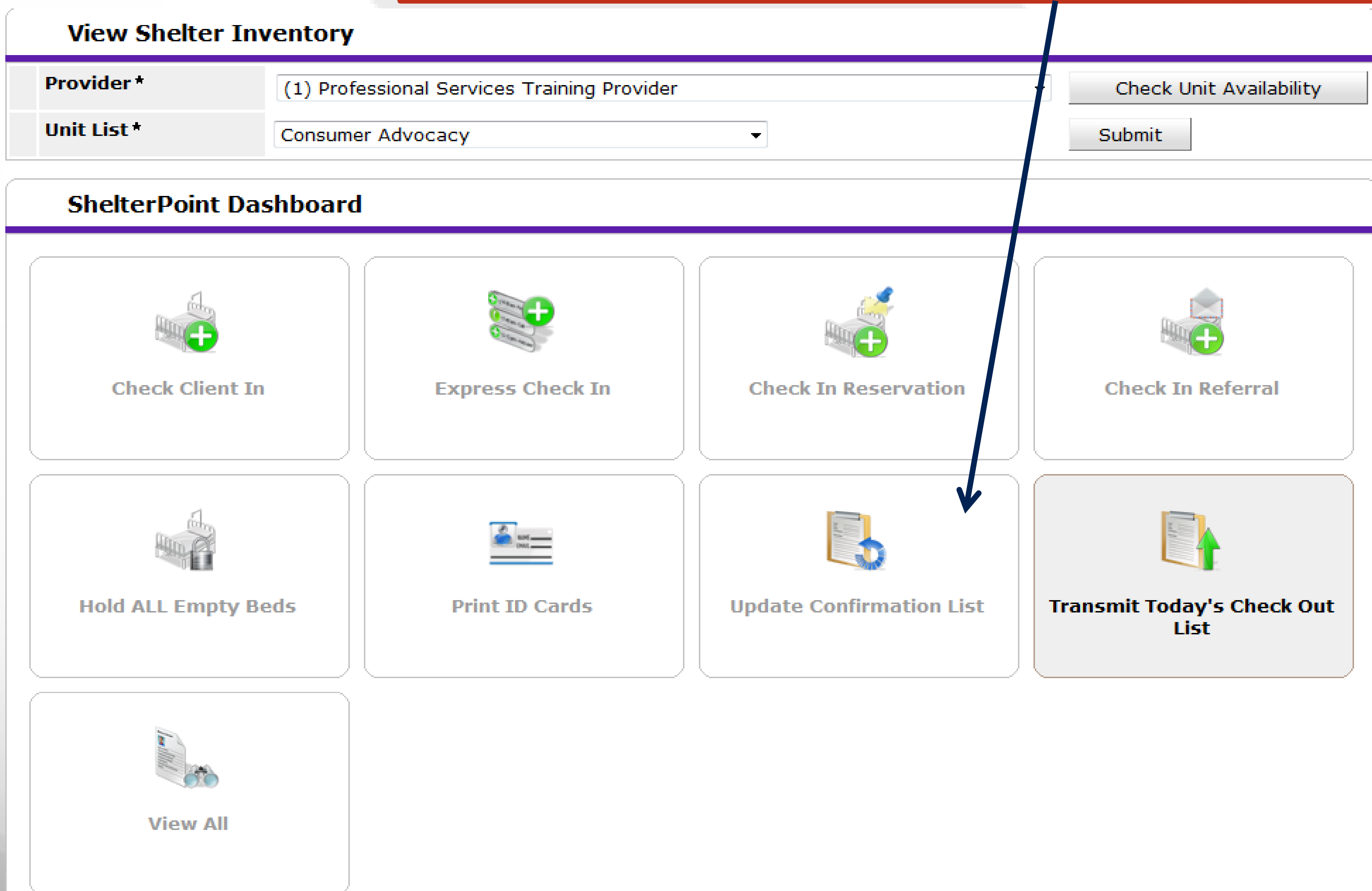
# Confirmation & Check Out List

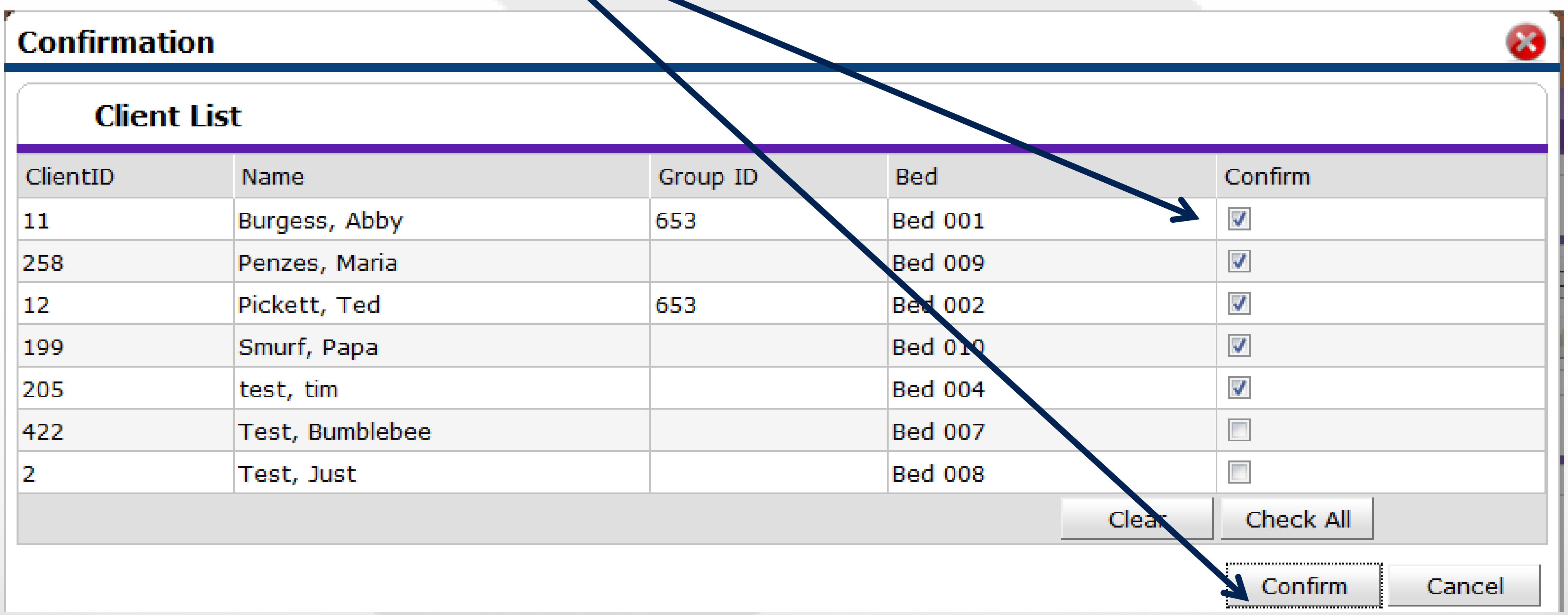
Update Confirmation Lists allows Shelters to confirm clients who will be stay in shelter from one night to the next.



Collaborate. Coordinate. Evaluate.

# Confirmation & Check Out List

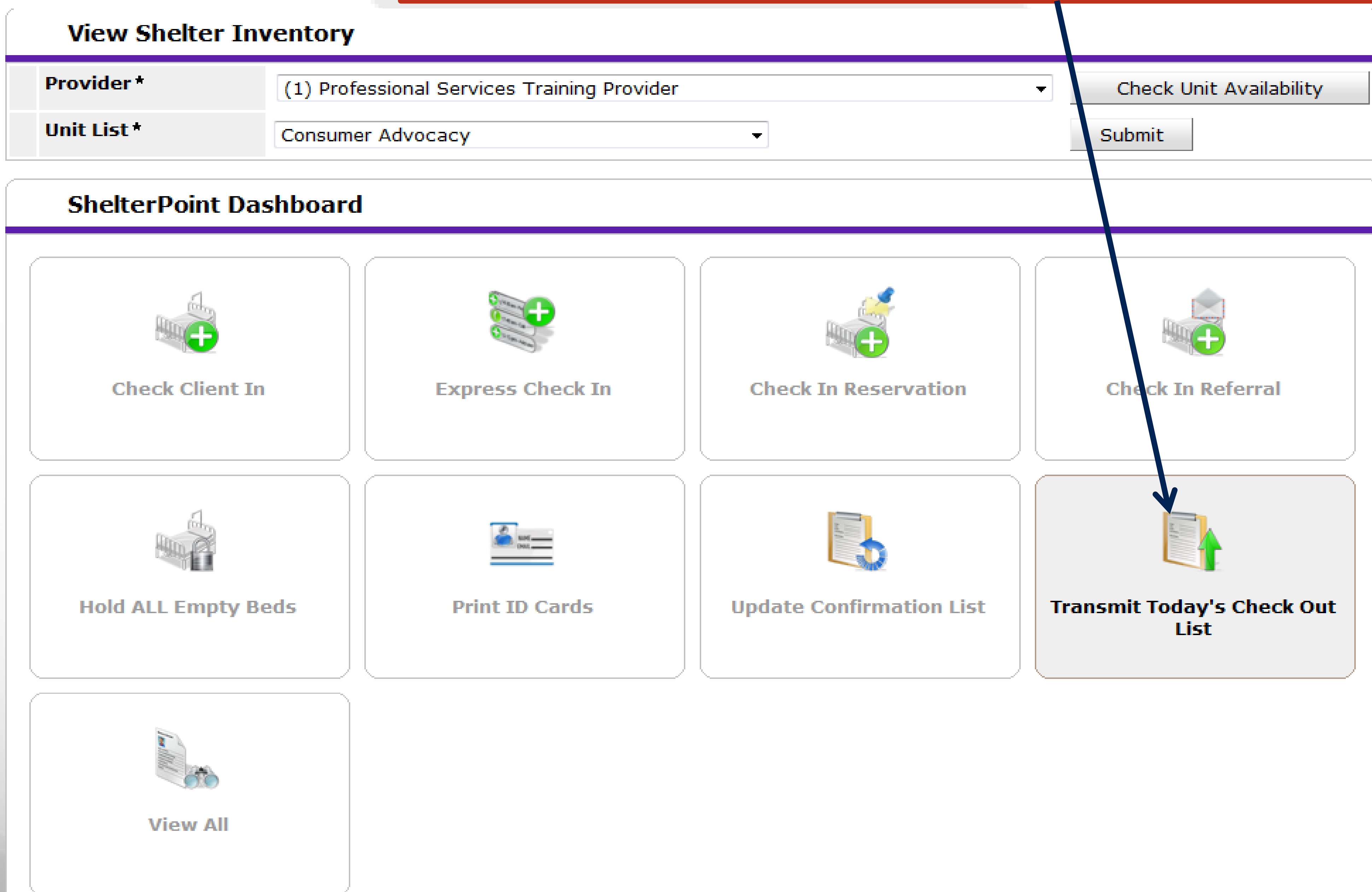
To use Confirmations click in the box in the confirm column of all clients that will be staying the next night and select confirm.




| ClientID | Name | Group ID | Bed | Confirm |
|---|---|---|---|---|
| 11 | Burgess, Abby | 653 | Bed 001 | ☑ |
| 258 | Penzes, Maria | | Bed 009 | ☑ |
| 12 | Pickett, Ted | 653 | Bed 002 | ☑ |
| 199 | Smurf, Papa | | Bed 010 | ☑ |
| 205 | test, tim | | Bed 004 | ☑ |
| 422 | Test, Bumblebee | | Bed 007 | ☐ |
| 2 | Test, Just | | Bed 008 | ☐ |

# Confirmation & Check Out List

Transmit Today’s Check Out List allows shelters to check all clients that have not confirmed an additional night of stay.

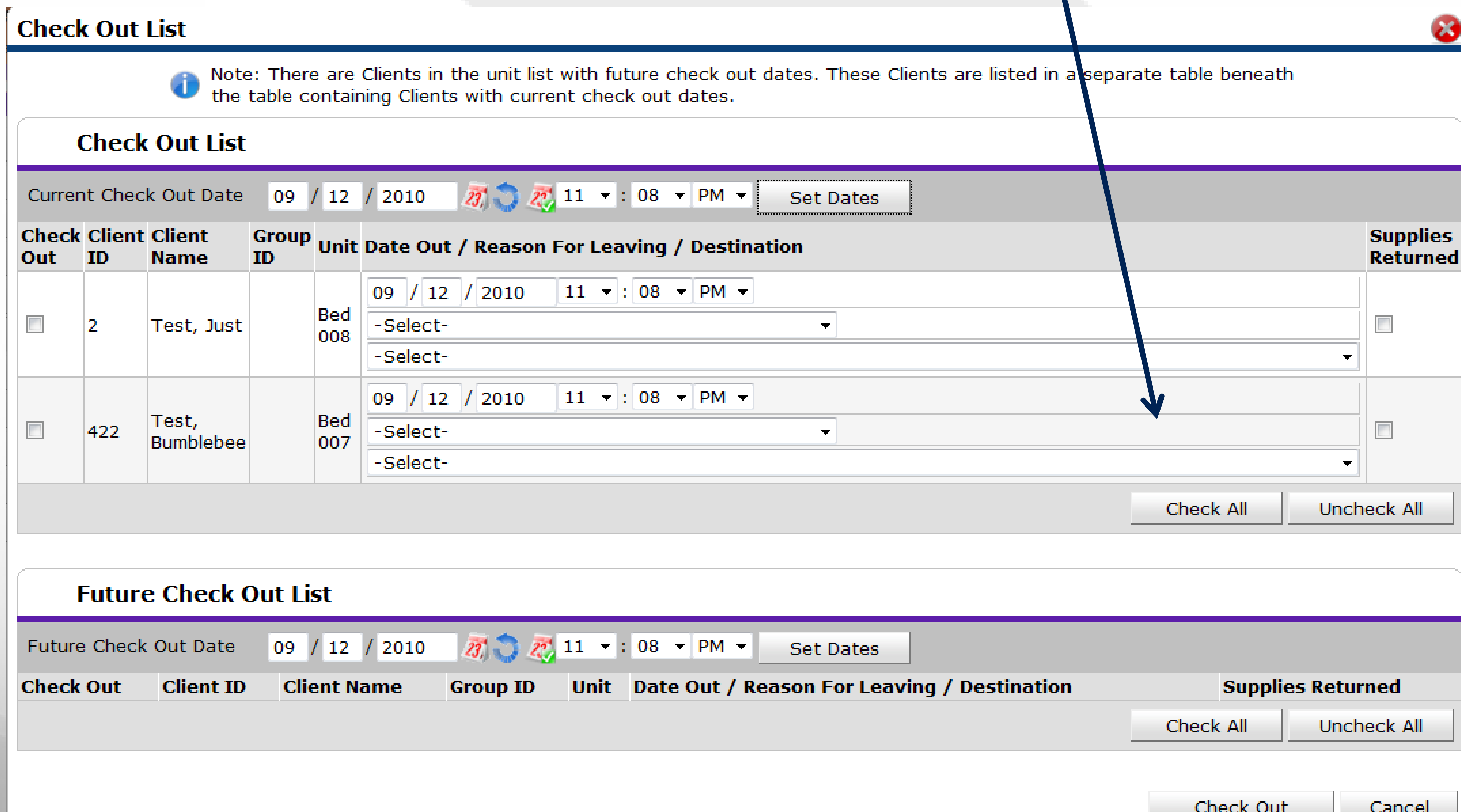



Collaborate. Coordinate. Evaluate.

Collaborate. Coordinate. Evaluate.

## Confirmation & Check Out List

Transmit Today’s Check Out List allows shelters to check all clients that have not confirmed an additional night of stay.



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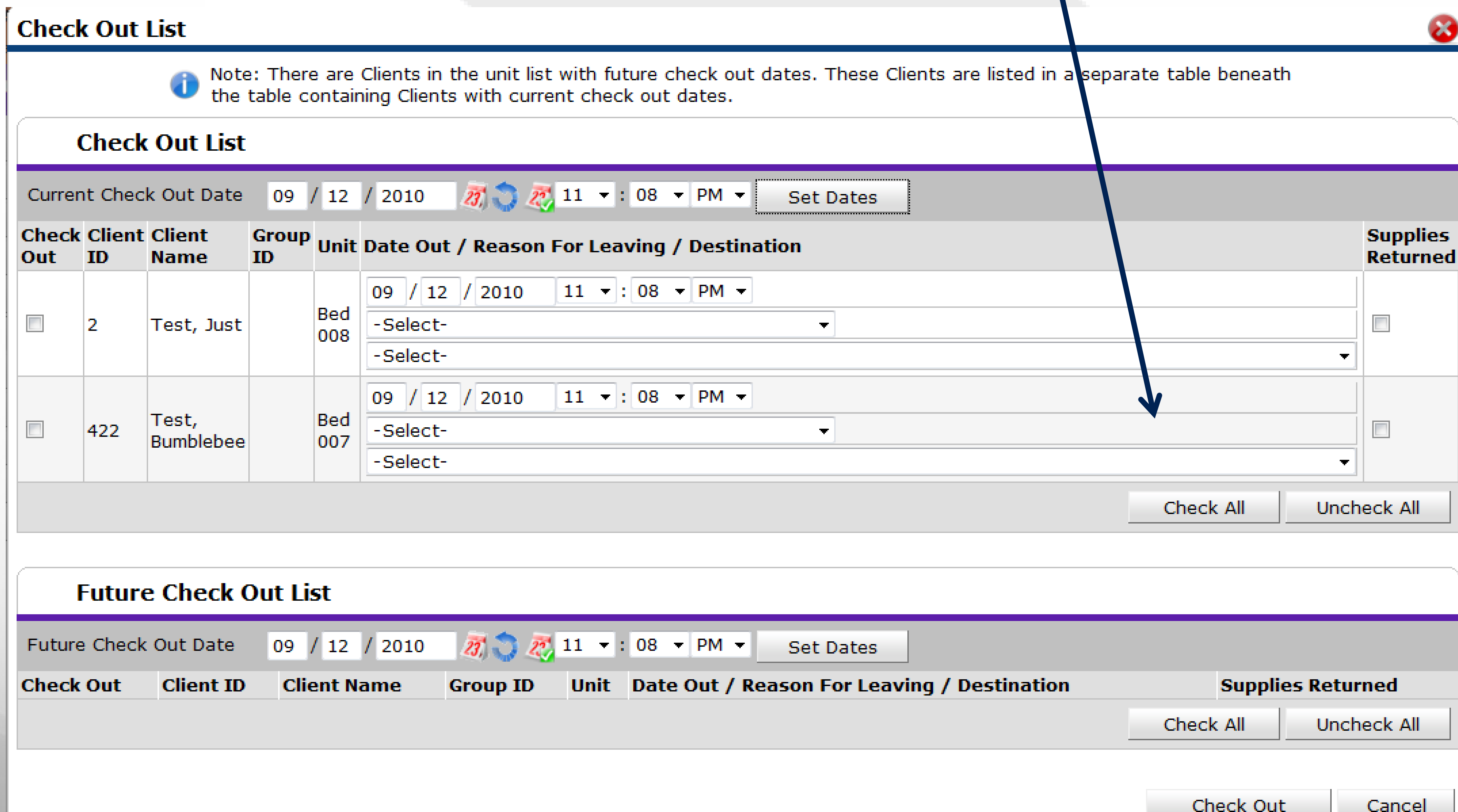
# Confirmation & Check Out List

Transmit Today's Check Out List allows shelters to check all clients that have not confirmed an additional night of stay.



## Confirmation & Check Out List



The Check Out List lets the Case Manager do several things:

- Select Clients to Check Out
- Select Check out Date
- Select reason for Leaving*
- Select Destination*
- Check Supplies are Returned*
- Automatically Exit clients that have an Entry/Exit*

•These features only appear if they are turned on in the Admin Providers page

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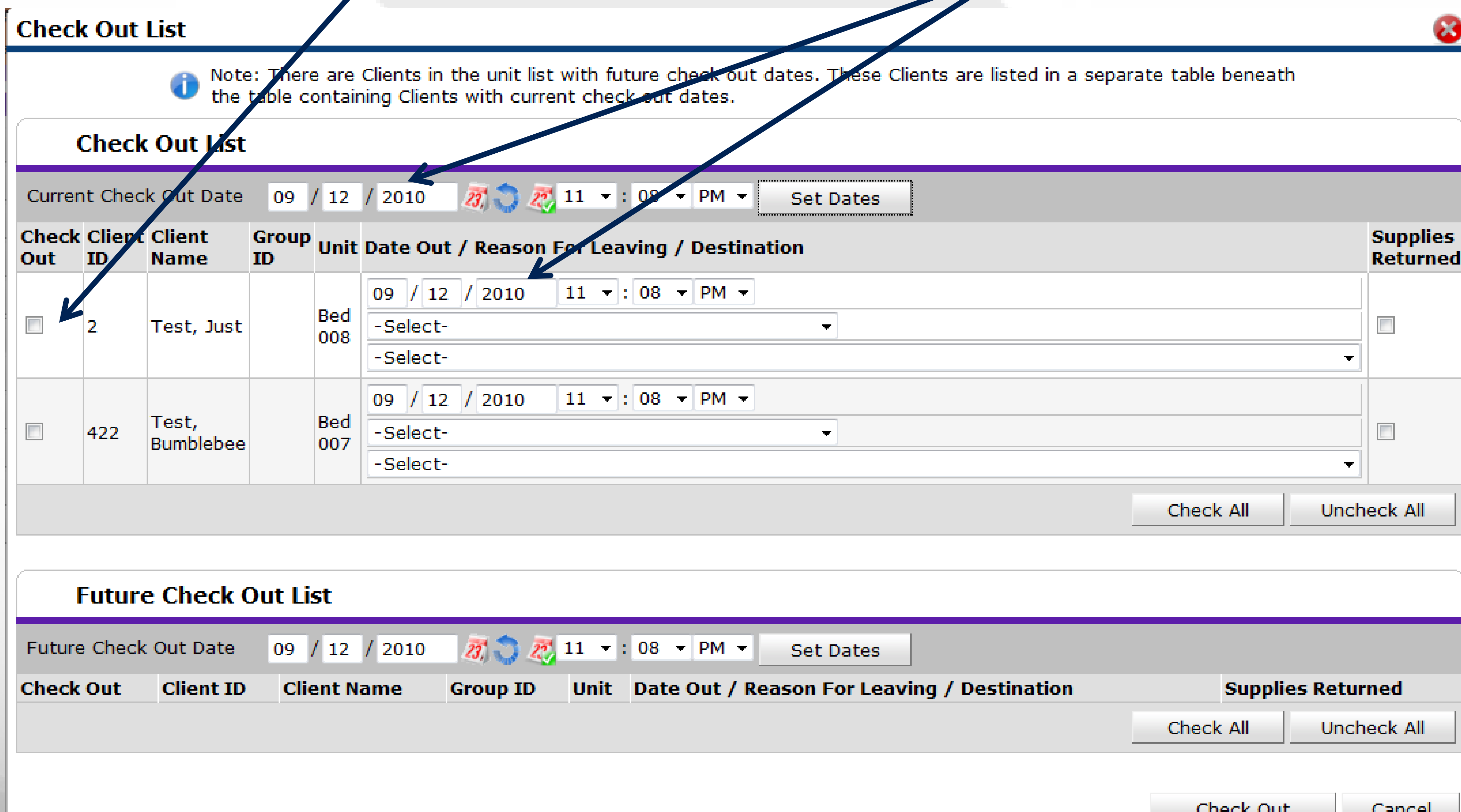
# Confirmation & Check Out List

First select clients to check out and then select check out date for the those respective clients.



**Check Out List**

Note: There are Clients in the unit list with future check out dates. These Clients are listed in a separate table beneath the table containing Clients with current check out dates.

**Check Out List**

Current Check Out Date 09 / 12 / 2010 11 : 08 PM Set Dates

| Check Out | Client ID | Client Name | Group ID | Unit | Date Out / Reason For Leaving / Destination | Supplies Returned |
|---|---|---|---|---|---|---|
| ☐ | 2 | Test, Just | | Bed 008 | 09 / 12 / 2010 11 : 08 PM<br>-Select-<br>-Select- | ☐ |
| ☐ | 422 | Test, Bumblebee | | Bed 007 | 09 / 12 / 2010 11 : 08 PM<br>-Select-<br>-Select- | ☐ |

Check All Uncheck All

**Future Check Out List**

Future Check Out Date 09 / 12 / 2010 11 : 08 PM Set Dates

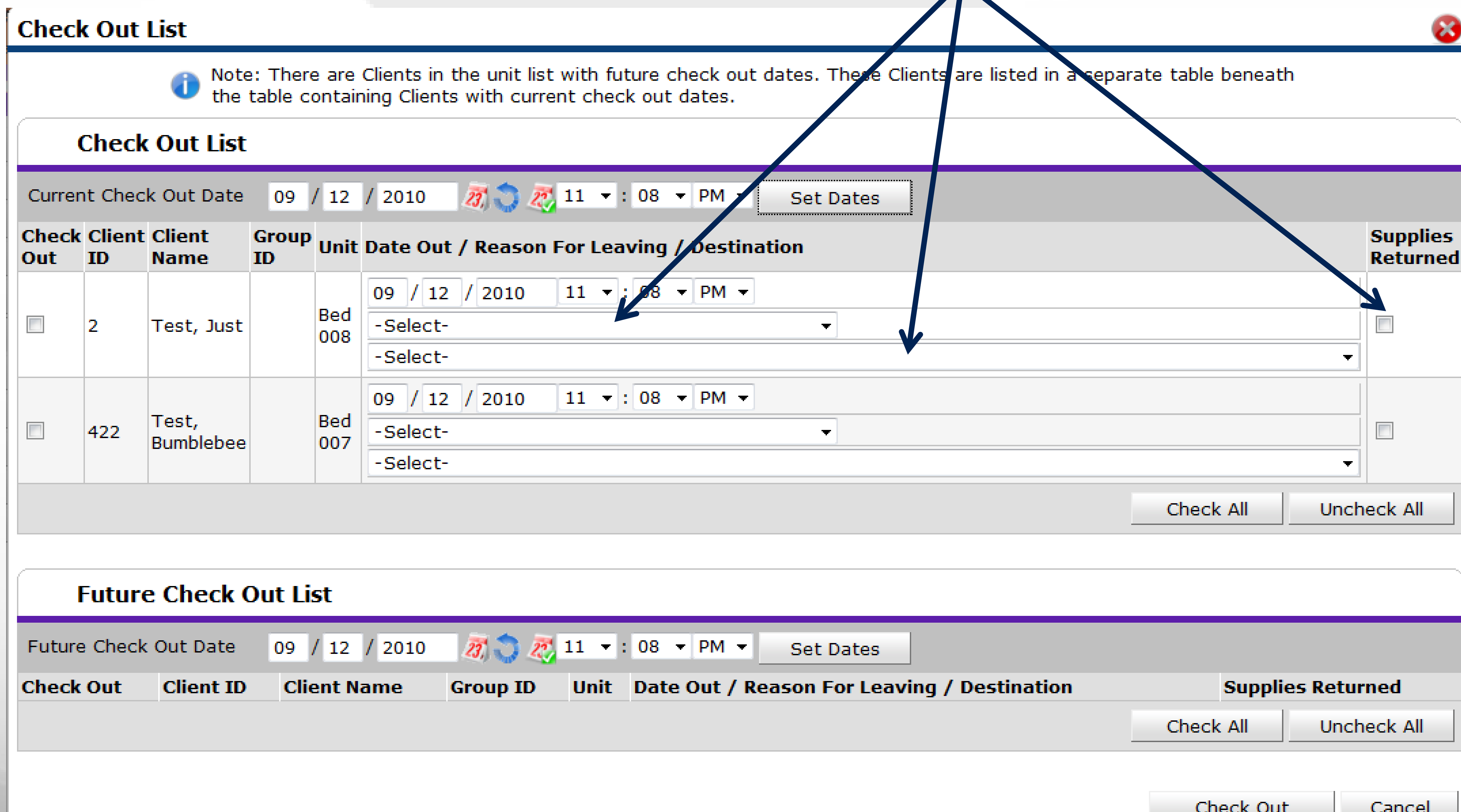
| Check Out | Client ID | Client Name | Group ID | Unit | Date Out / Reason For Leaving / Destination | Supplies Returned |
|---|---|---|---|---|---|---|

Check All Uncheck All

Check Out Cancel

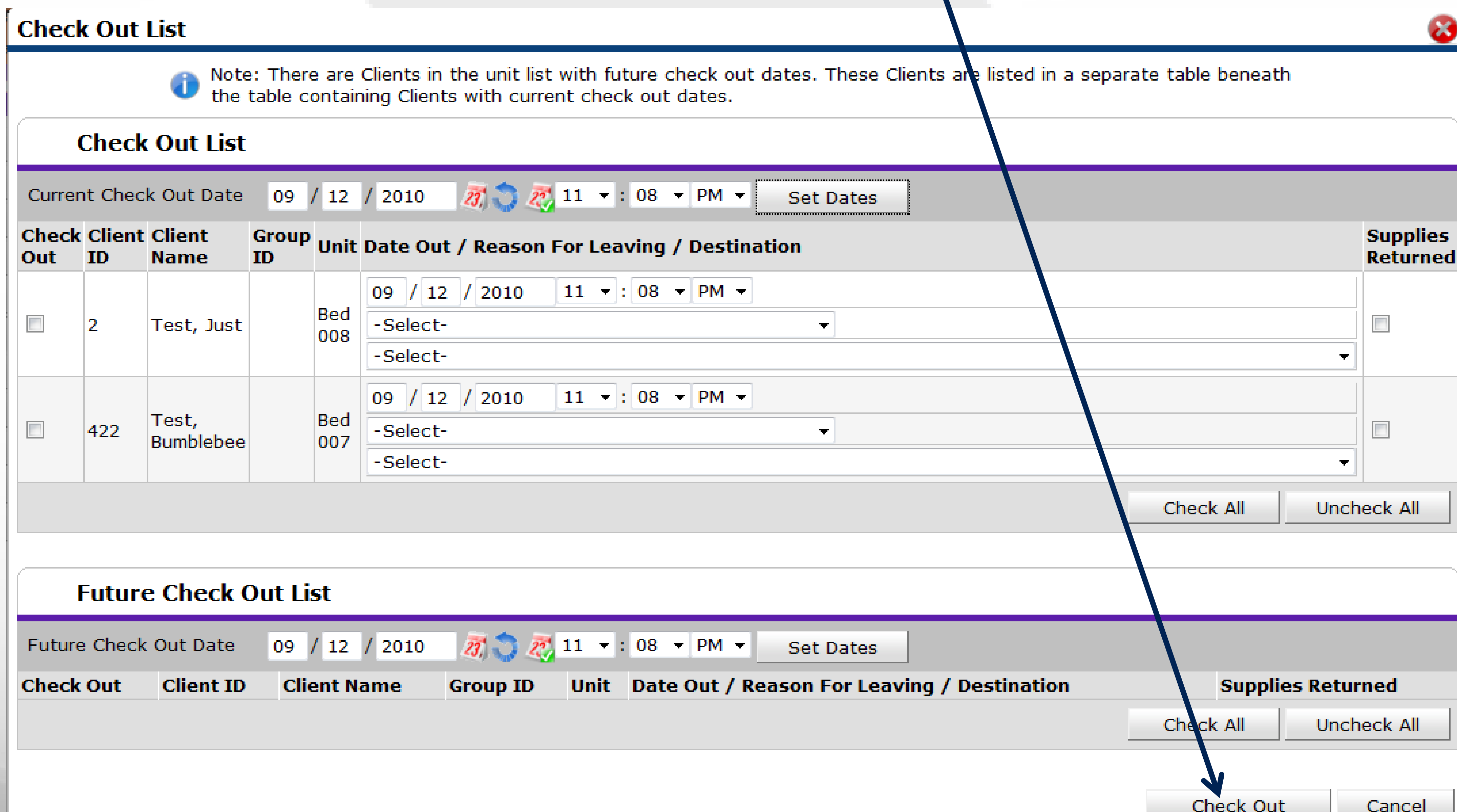
## Confirmation & Check Out List

Next, if appropriate, select the Reason for Leaving (top drop down list), Destination (bottom drop down list), and if Supplies were Returned.



# Confirmation & Check Out List

The final step is to click on "Check Out" to finish the process.



Collaborate. Coordinate. Evaluate.

# Additional Features

ShelterPoint has a few additional features that may be utilized by case managers. Those features are:

- Incidents
- Hold All Empty Units
- Entry/Exit at check in
- Default Assessment
- Multiple Services at check in
- Print ID Cards

Collaborate. Coordinate. Evaluate.

# Additional Features

Incidents help case managers identify those clients that have broken rules within their shelter. If shared, incidents alerts other shelters of these bans to help determine if the client is a candidate to be in other shelters. To use Incidents click on "Add Incidents" button at client check in.

**Incidents For tim test**

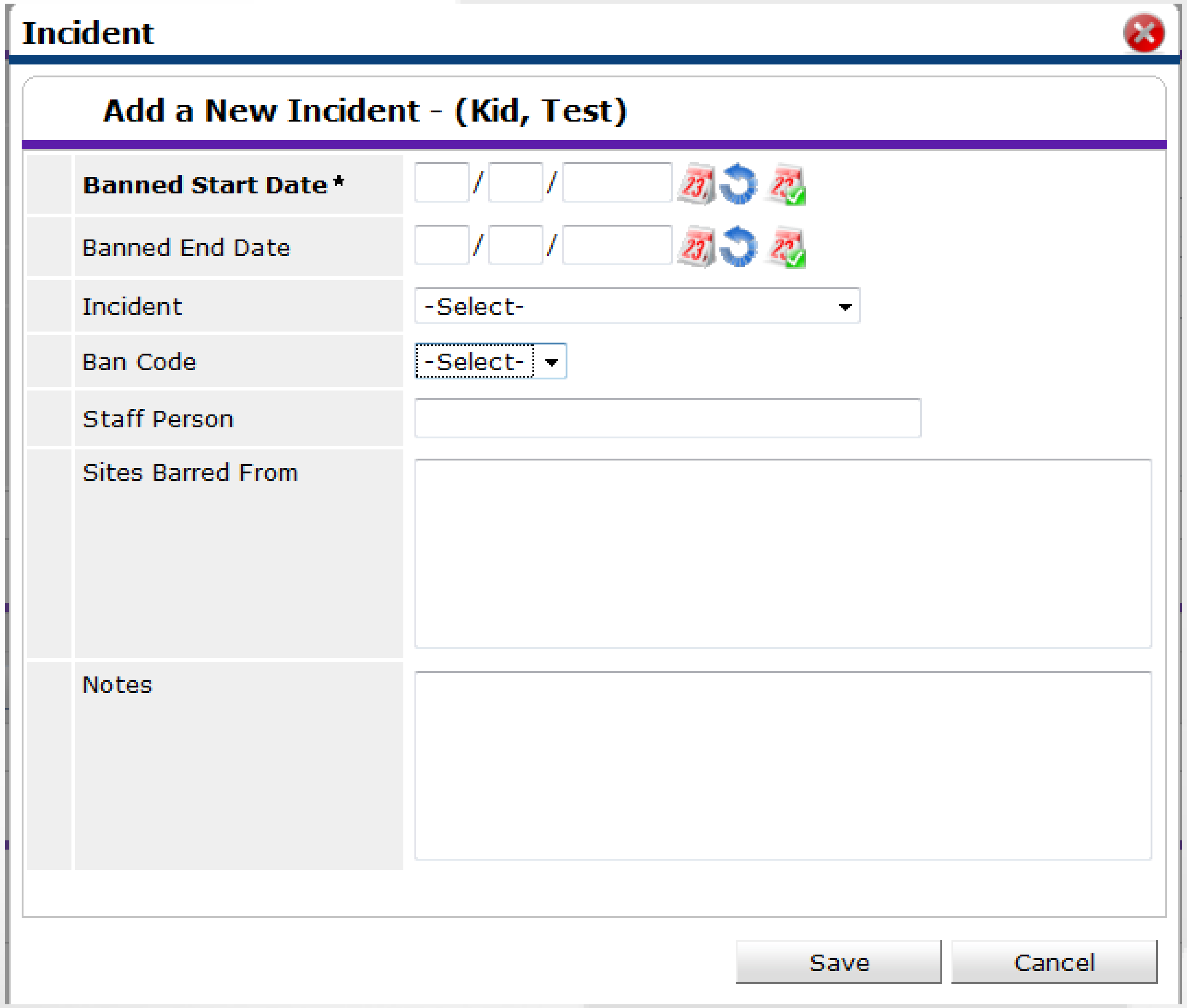
| | Ban Start | Ban End | Incident | Ban Code | Provider | Site | Staff |
|---|---|---|---|---|---|---|---|
| Add New Incident | | | | No matches. | | | |

Collaborate. Coordinate. Evaluate.

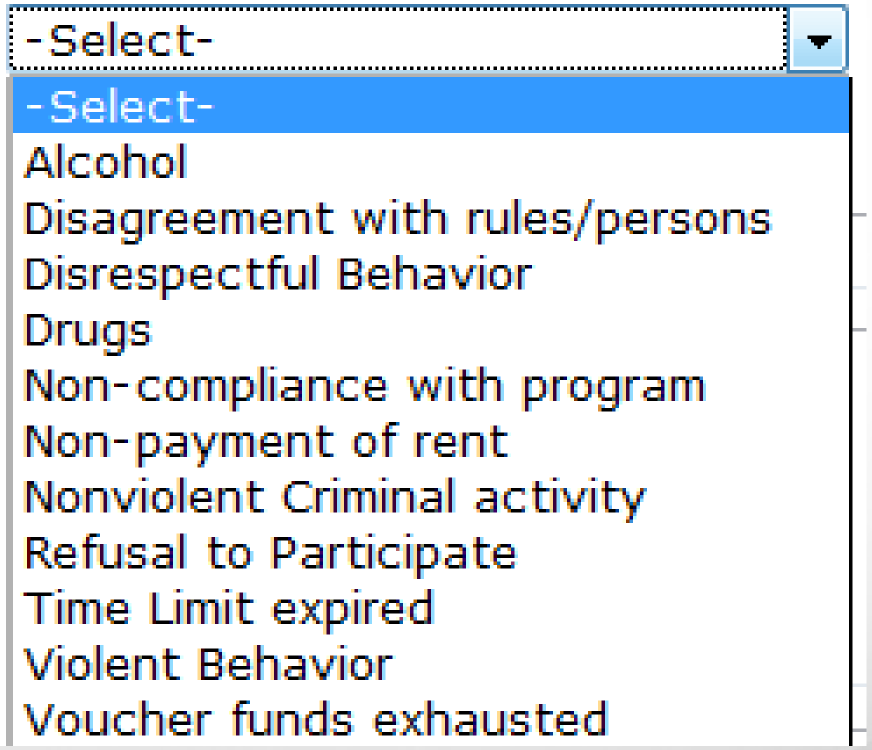
BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

## Additional Features




Enter the appropriate information in the corresponding pop up box and “Save” When finished. The Incident types are listed below.



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BOWMAN systems

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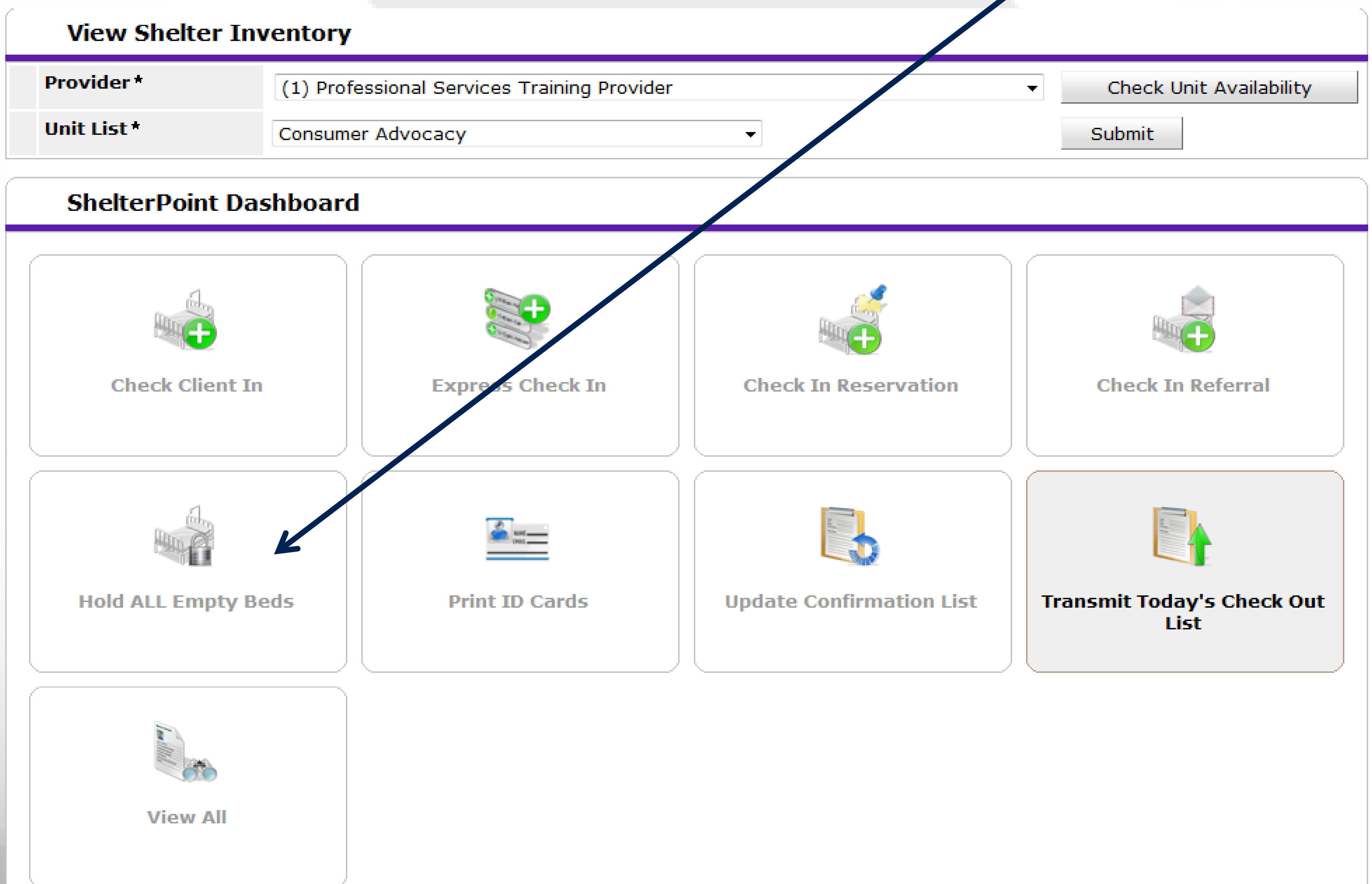
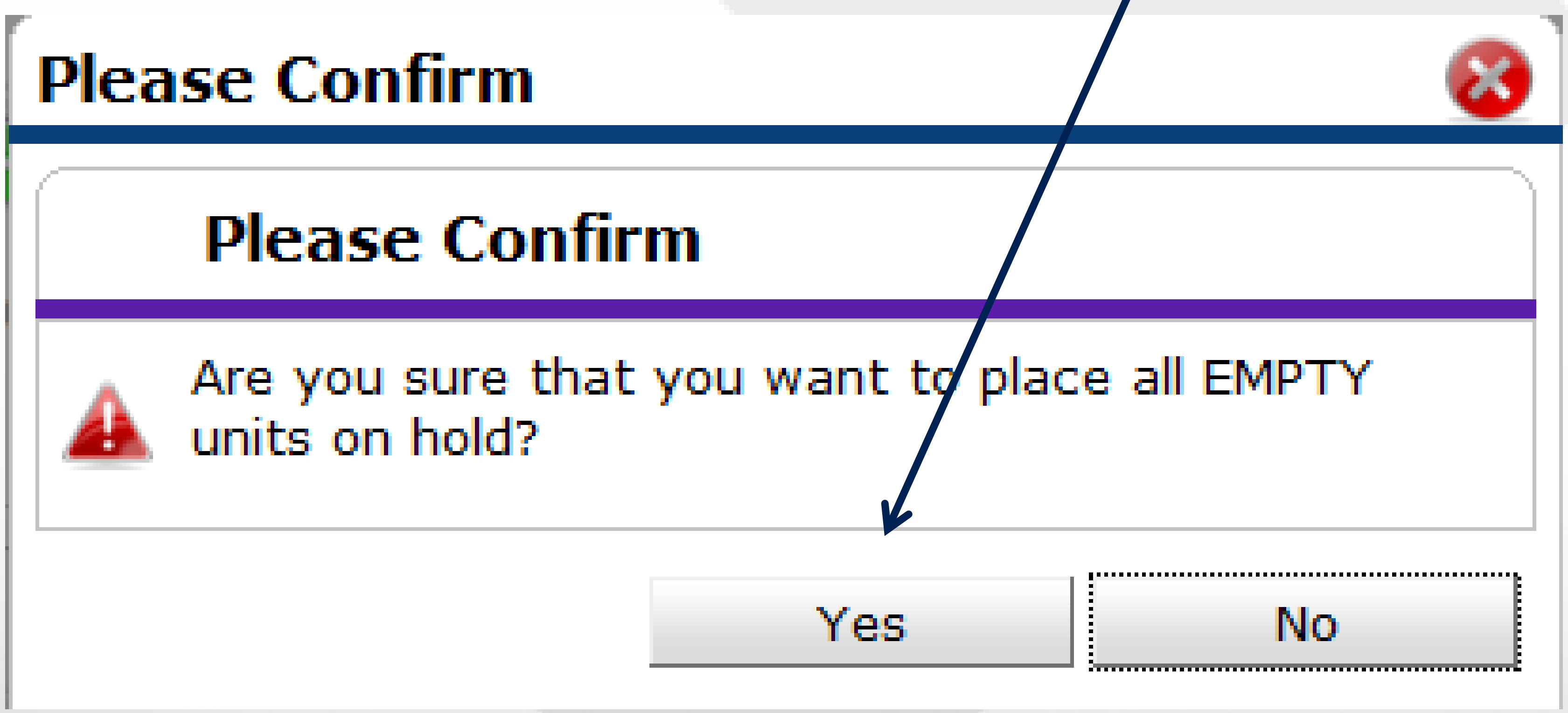
## Additional Features

To Hold All Empty Units, click on the corresponding button on the ShelterPoint Dashboard.



## Additional Features

To verify the hold click on "Yes." All units are now held.



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BOWMAN systems

2-1-1 / I&R Housing Youth & Family Services Older Adult Services

## Additional Features

After clicking yes, case managers will be taken to the Shelter Inventory Information Screen. Notice all units are held that are not assigned to a client. To remove a hold click on "HELD" or the "Release All HELD Units" button.

**Shelter Inventory Information**

**Unit List - Abby's Training List**

Display: All Beds | Sort By: Floor | Ascending | Sort

| Floor | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|---|---|---|---|---|---|---|---|---|---|
| Main | West Wing | Bed 001 | | (11) Burgess, Abby | 03/09/1980 | Female | 653 | No | |
| Main | West Wing | Bed 002 | | (12) Pickett, Ted | | | 653 | No | |
| Main | West Wing | Bed 003 | | (421) Test, Ladybug | | | | No | |
| Main | West Wing | Bed 004 | | (205) test, tim | 04/15/1977 | | | No | |
| Main | West Wing | Bed 005 | | HELD | | | | | |
| Main | West Wing | Bed 006 | | HELD | | | | | |
| Main | West Wing | Bed 007 | | (422) Test, Bumblebee | | | | No | |
| Main | West Wing | Bed 008 | | HELD | | | | | |
| Main | West Wing | Bed 009 | | (258) Penzes, Maria | | | | No | |
| Main | West Wing | Bed 010 | | (199) Smurf, Papa | 10/04/1920 | Male | | No | |
| | | Overflow (New) | | EMPTY | | | | | |

Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

Collaborate. Coordinate. Evaluate.

# Additional Features

If permission is given in the Admin Provider page, Case Managers can attach an Entry/Exit to a client at check in. The following section will appear in the Unit Stay Entry Data. The type of Entry/Exit can be pre-filled in Admin Provider page. If needed case managers can select a different provider.

**Entry Data**

| | |
|---|---|
| **Provider *** | (1) Professional Services Training Provider |
| **Type *** | Basic |

Collaborate. Coordinate. Evaluate.

## Additional Features

A Default Assessment can be determined on the Admin Provider Page. If shelters wish to have case managers some basic information at client check in the assessment will appear in a section on the Unit Stay Entry Data screen (example below).

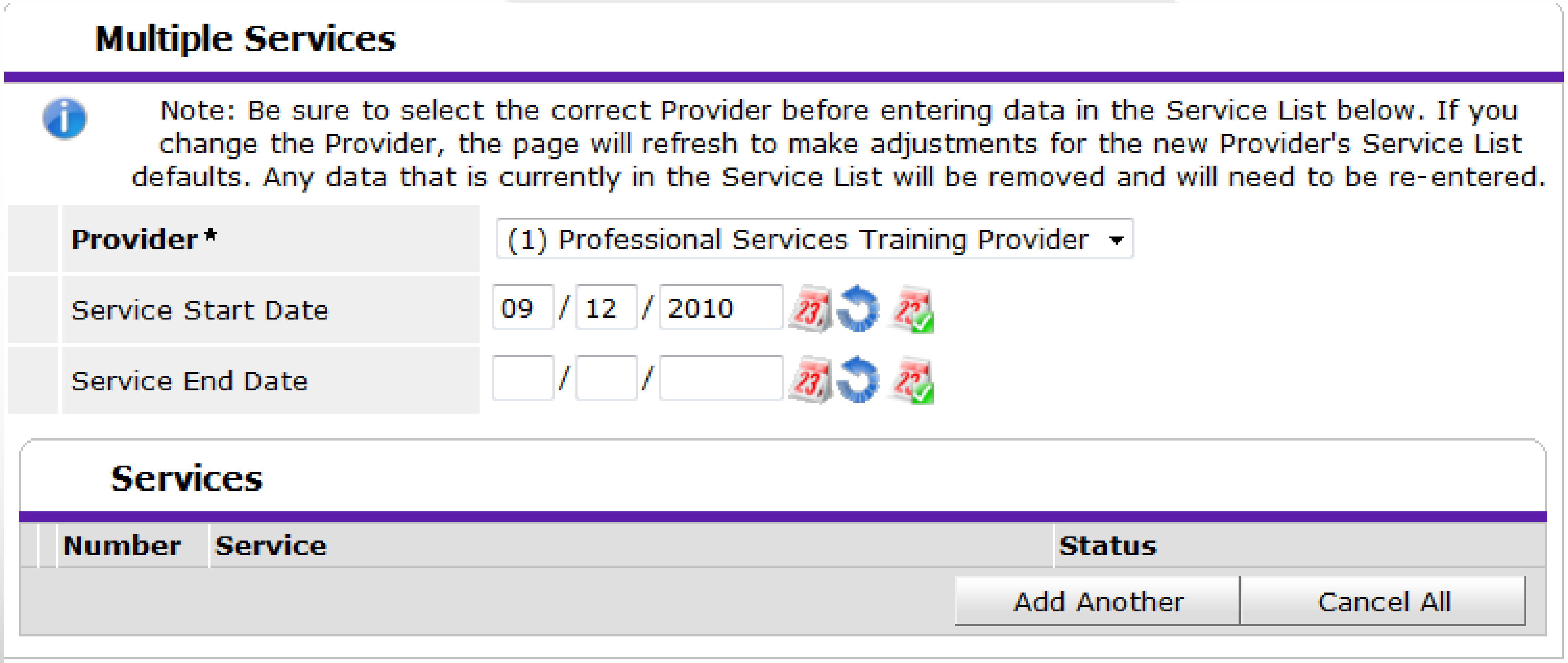
**Additional Profile Information**

| | |
|---|---|
| Date of Birth | 10 / 04 / 1920 G |
| Date of Birth Type | Full DOB Reported (HUD) G |
| Gender | Male G |
| Primary Race | Black or African American (HUD) G |
| Secondary Race 2 | American Indian or Alaska Native (HUD) G |
| Ethnicity | Non-Hispanic/Non-Latino (HUD) G |

Collaborate. Coordinate. Evaluate.

## Additional Features

Agency Administrators can also add the Multiple Services feature at Check In on the Admin Providers page. This puts the Multiple Services entry directly into the Unit Stay Entry Data Screen as a section. Case Managers can then add Services directly at Check In.


**Multiple Services**

Note: Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

| | |
|---|---|
| **Provider** * | (1) Professional Services Training Provider |
| Service Start Date | 09 / 12 / 2010 |
| Service End Date | / / |

**Services**

| Number | Service | Status |
|---|---|---|

Add Another | Cancel All

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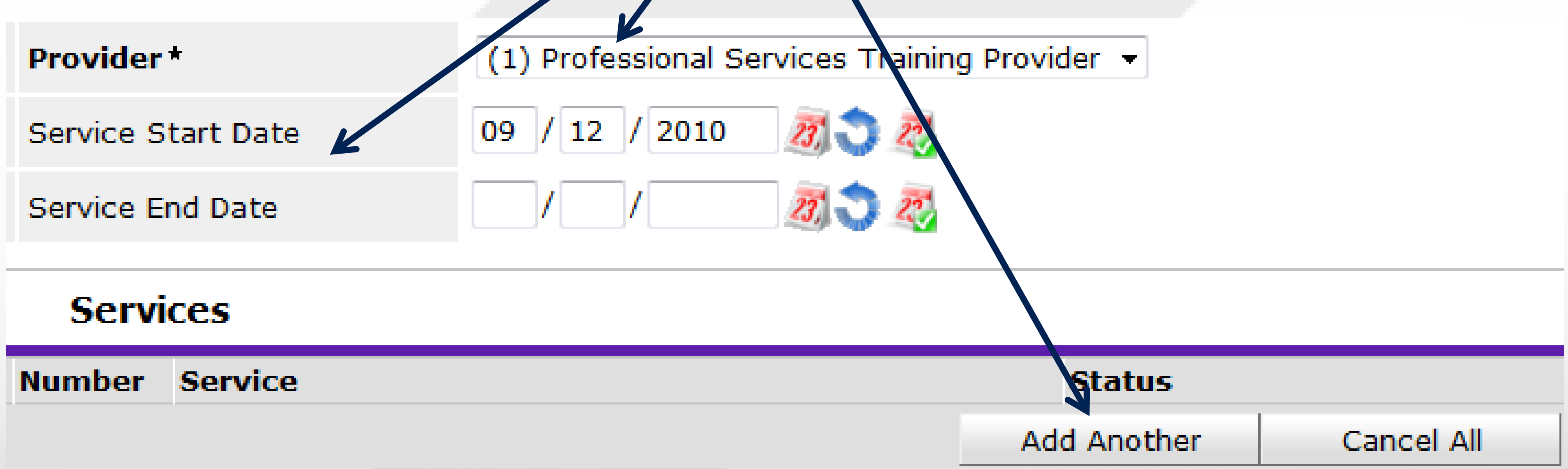
## Additional Features

Case Managers have the ability to add services only. Deleting and changing must be done in Service Transaction. Case Managers will select the appropriate provider, enter start and end dates, then select “Add Another.” Once Case Managers add a



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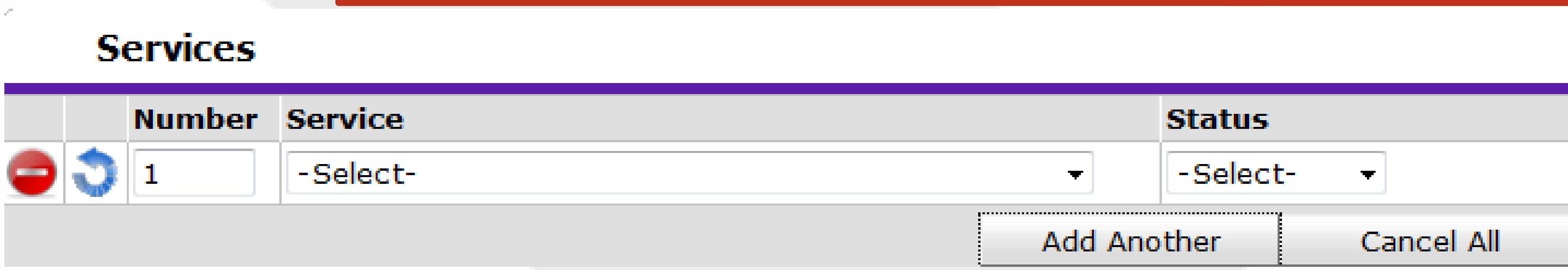
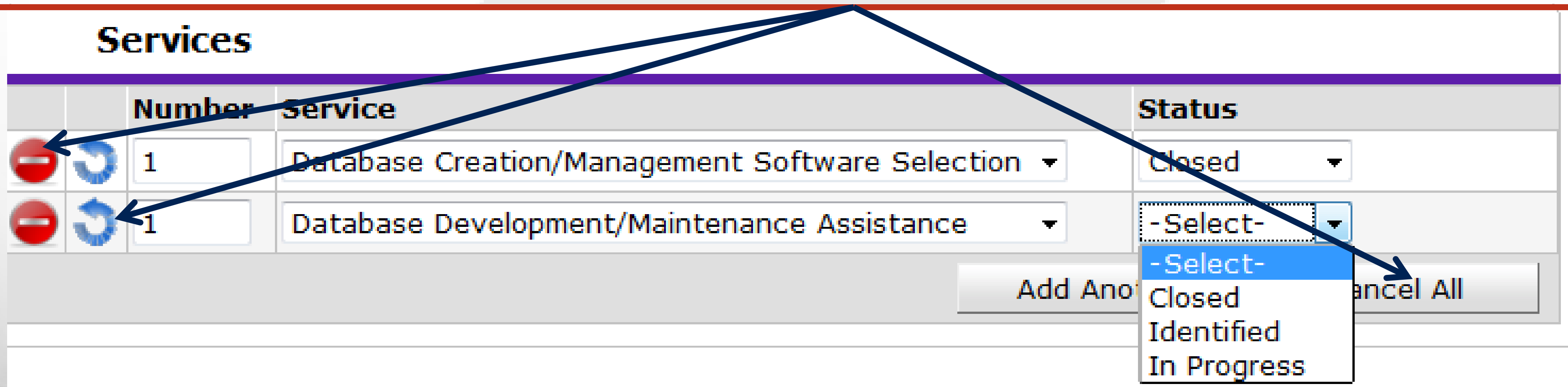
## Additional Features

The Case Managers will then select from the number of service instances provided, what the service is and the status of that service.




Case Managers may delete the service or cancel all services in this window. Once saved all adjustments must be made in Service Transactions.



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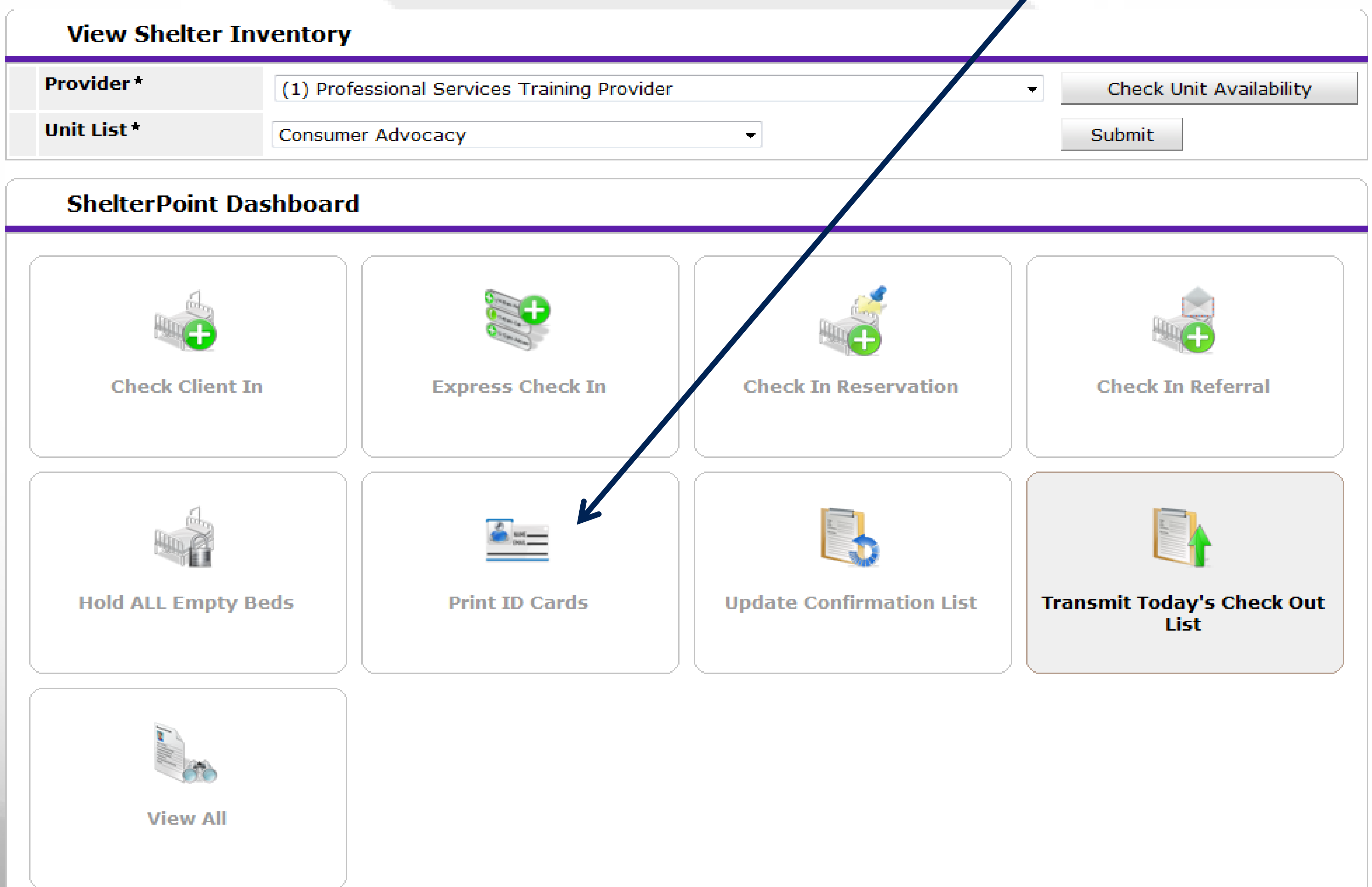
## Additional Features

Case Managers have the ability to Print ID Cards for clients that are checked into the shelter. To use this feature press the “Print ID Cards Icon.”



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# Additional Features

The following Screen will pop up. Select the client(s) that an ID card needs to be printed for and select "Print Client ID Cards."

**Print Client ID Cards**

Note: Check client names to generate ID cards.

**Client List**

| | Client Name | Alias | Social Security Number |
|---|---|---|---|
| ☐ | Burgess, Abby | Ms. Abby | |
| ☐ | Penzes, Maria | | 111-11-1112 |
| ☐ | Pickett, Ted | | -- |
| ☐ | Smurf, Papa P | big papa | 234-09-8765 |
| ☐ | test, tim | bob | -- |
| ☐ | Test, Bumblebee | | -- |
| ☐ | Test, Ladybug | | -- |

Check All Clients | Clear All Clients | **Showing 1-7 of 7**

Card Orientation 1

Print Client ID Cards | Cancel

Collaborate. Coordinate. Evaluate.

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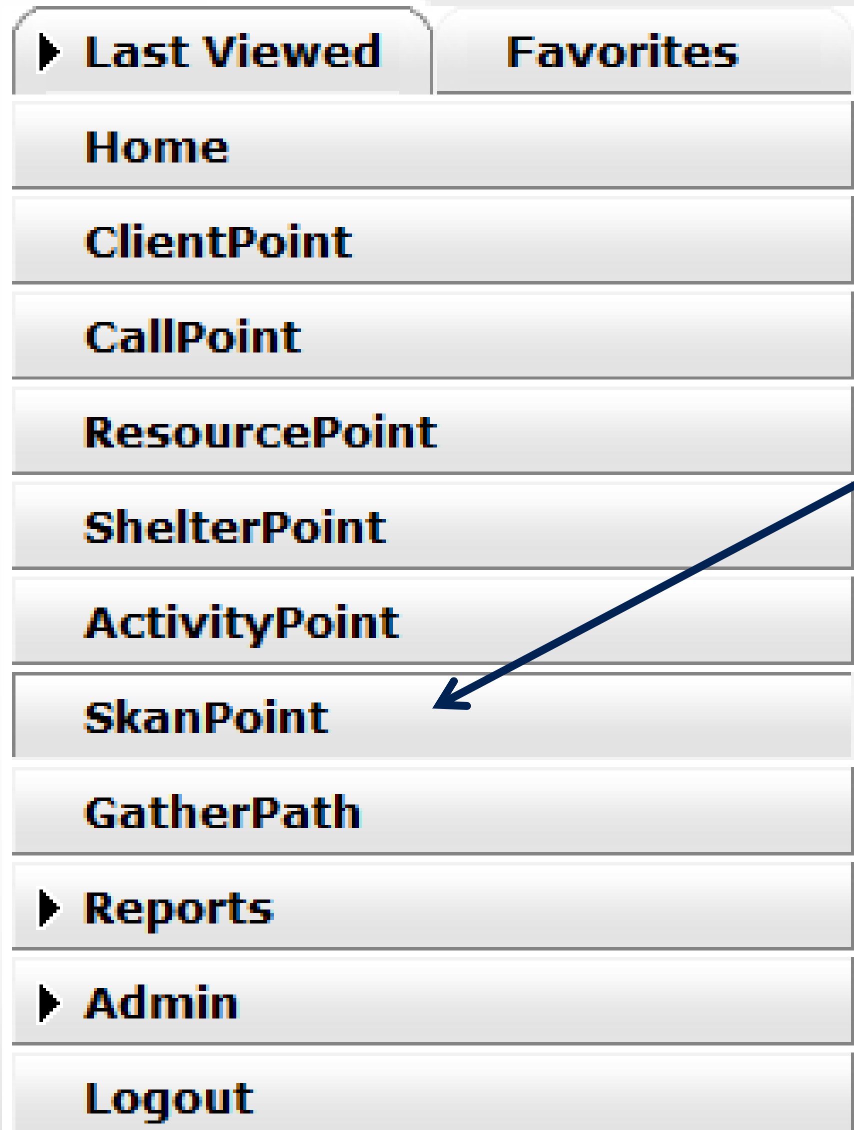
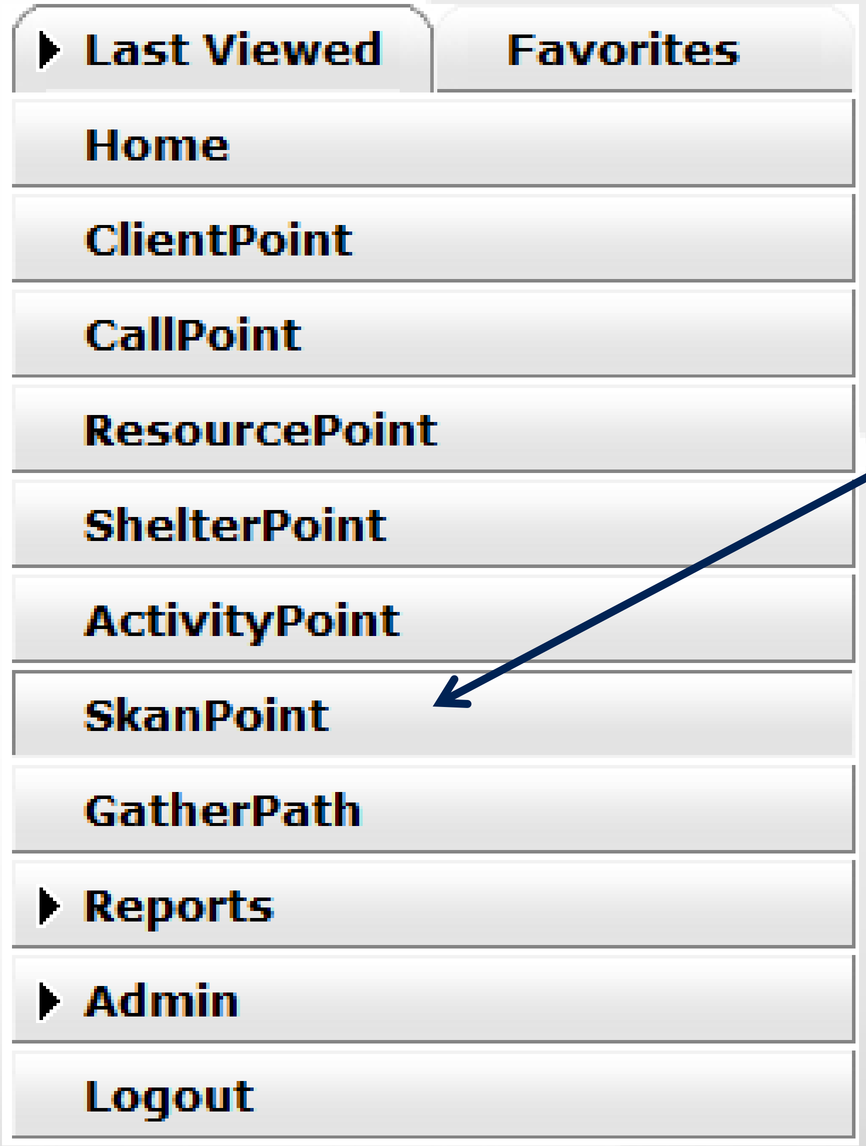
# SkanPoint




SkanPoint can be used to add Shelter stays for individuals or all members in a household at once. To use this feature click on SkanPoint on the left hand menu.

Collaborate. Coordinate. Evaluate.

# SkanPoint




SkanPoint can be used to add Shelter stays for individuals or all members in a household at once. To use this feature click on SkanPoint on the left hand menu.

Collaborate. Coordinate. Evaluate.

## SkanPoint

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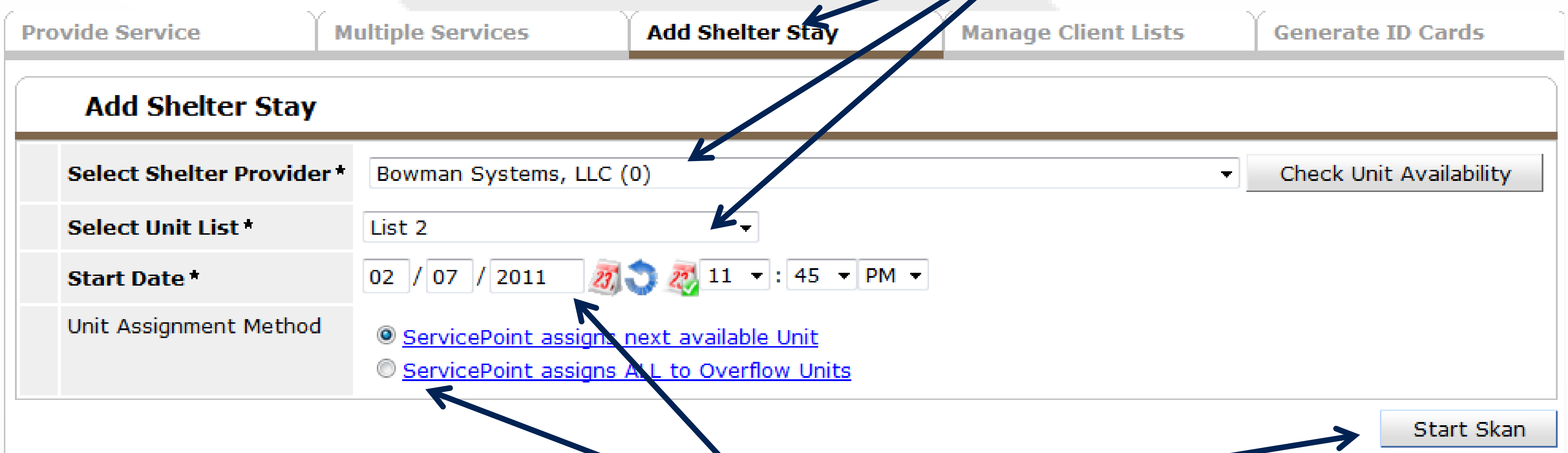
When in SkanPoint select the "Add Shelter Stay" Tab. From Here select the Shelter Provider and the appropriate Unit List for that provider.




Enter a "Start Date" for shelter and select if clients will be assigned to the next available Unit or to Overflow Units. When finished click on the "Start Skan" button.

Collaborate. Coordinate. Evaluate.

## SkanPoint

Once the "Start Skan" button is pressed the "Client Search Screen" will appear. Search for clients by using the all or any combination of First Name, Last Name, and/or Social Security Number. The client ID number may also be typed in or scanned at this time.

**Client Search**

Note: Please Search the System before adding a New Client.

| | First | Middle | Last | Suffix |
|---|---|---|---|---|
| Name | | | | |
| Alias | | | | |
| Social Security Number | - - | | | |
| *Social Security Number Data Quality* | -Select- | | | |
| Exact Match | ☐ | | | |

Search Clear

**Skan Client Bar Code**

Skan Code  Skan Bar Code

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SkanPoint

The search results will display. Once the client being searched for has been verified, click on the green "Select" icon. NOTE: Client cannot be added, clients will need to be entered into the system prior to using SkanPoint.

**Client Results**

| | Client # | Name | Alias | Social Security Number | Banned |
|---|---|---|---|---|---|
| | 2 | Test, Just A | | 888-88-8888 | |
| | 353 | Test, Just | | 111-11-1111 | |
| | 570 | Test, Kid B | Bubba | 849-75-3411 | |

**Showing 11-20 of 33** First Previous Next Last

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## SkanPoint

If the selected client has additional Household members, the Household Overview screen will appear. Household maintenance can be performed here as well as selecting the appropriate Household members the Shelter Stay is for.

**Add Additional Household Members - (2) Test, Just**

**Household Data**

**Households Overview**

| | | Type | | Count | Relationship | Date Entered | Date Removed | Head of Household | Monthly Income |
|---|---|---|---|---|---|---|---|---|---|
| | | Female Single Parent | H | 3 | | | | | |
| | | Test, Just A | | | Self | 03/04/2010 | | Yes | |
| | | ZZ000000001, Anonymous | | | Other non-relative | 03/04/2010 | | No | |

Search to Add this Client to an Existing Household | Start New Household

**Household Members**

To include Household Members in this Service, click the box besides each name.

**Household #1 Members:** Check All Household Members | Clear All

- [ ] Corbin, Levin
- [ ] ZZ000000001, Anonymous

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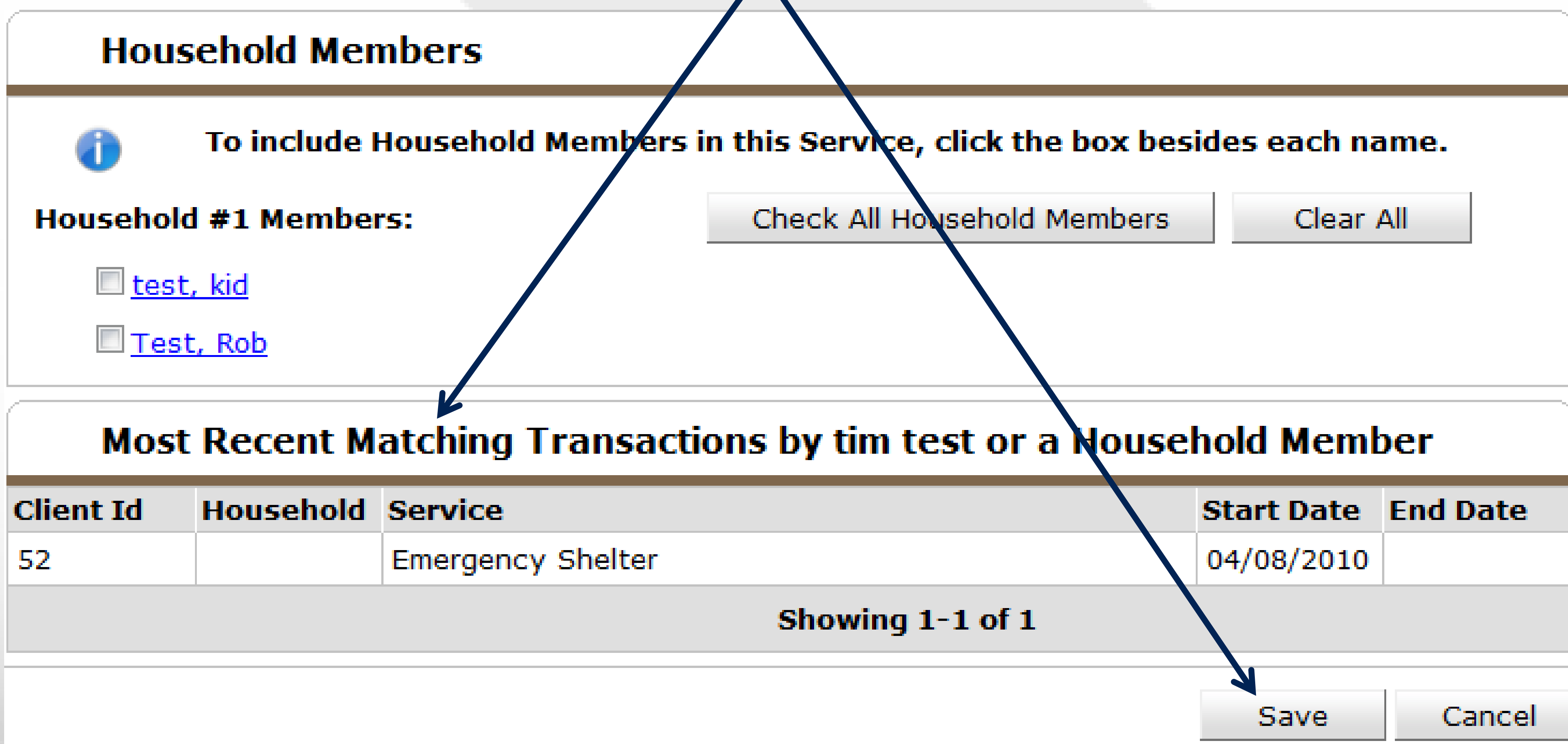
## SkanPoint

An overview of the most recent matching Transactions by the client that was searched for or by a household member. Select the “Save” button when finished.



## SkanPoint

An overview of the Clients Entered will show. Repeat the Search or Skan for additional clients to check in. If a client was entered in error the “Remove Last Entry” button can be used or use the red remove icon.

**Clients Entered**

| | ID | Client | Alias | Social Security Number |
|---|---|---|---|---|
| | 206 | test, kid | | -- |
| | 205 | test, tim | bob | -- |

Remove Last Entry **Showing 1-2 of 2**

Enter Service for Clients | Enter Service & Create New Session | Cancel

When all clients have been added to the list select the “Enter Service for Clients” or “Enter Service & Create New Session” to update a different Unit List or Provider.