

## ShelterPoint<sup>TM</sup> version 5.2.3

## Data-Entry Workflows







## ShelterPoint v5.2.3

ewed Favorites	Serv	ricePoint News	Agency News	
	Date	Headline	Date	Headline
nt	02/18/20	Bowman Systems Training Feedback Survey		
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	Add Ne	WS	Add	News
	`	w Up List		







### 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.



### 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







## ShelterPoint v5.2.3

SERVICE point Connecting your community.							
ServicePoint Training Site							
User Name							
Password							
	Login						
	your username or password? ct your agency administrator						
_	use requires your compliance the terms and conditions						
©1999-	2010 Bowman Systems L.L.C. All Rights Reserved						

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

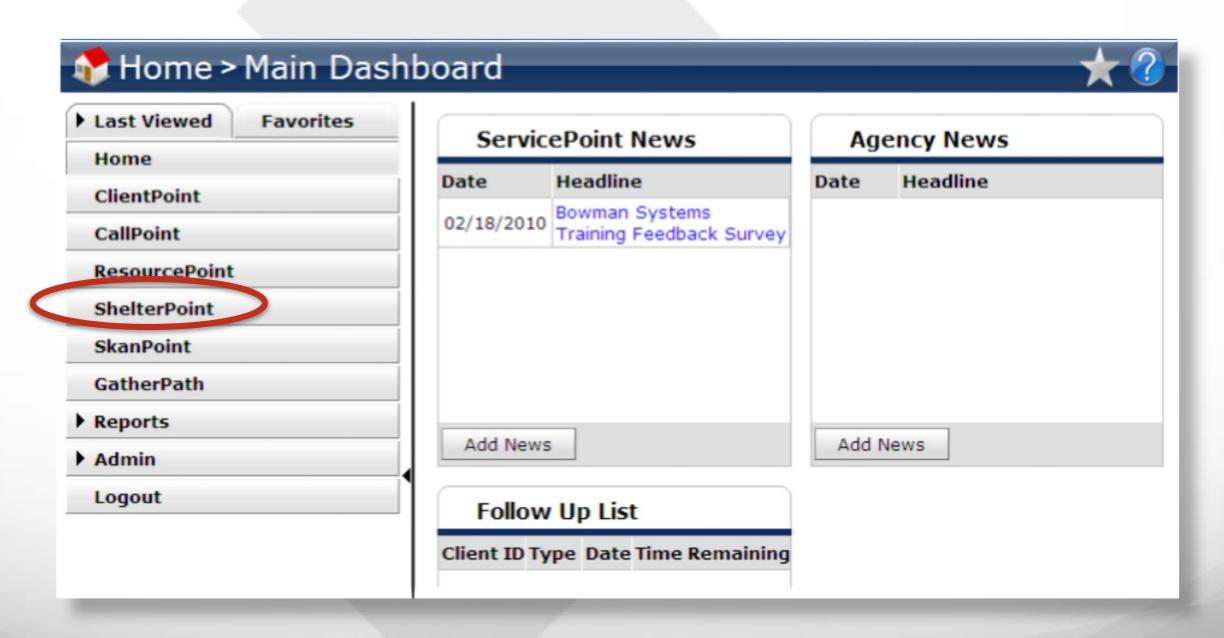
Contact your Agency or System Administrator if you need assistance in gaining access to ServicePoint®.







## ShelterPoint v5.2.3









### ShelterPoint Main Menu

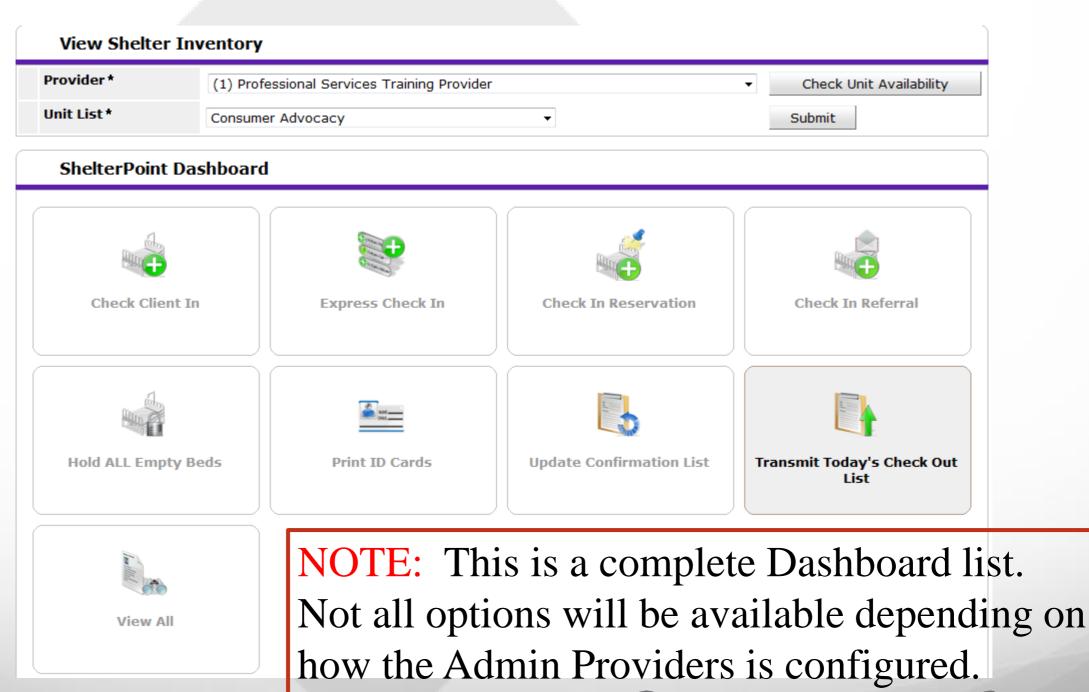
View Shelte	r Inventory	
Provider *	(1) Professional Services Training Provider	▼ Check Unit Availability
Unit List*	Consumer Advocacy ▼	Submit
ShelterPoin	t Dashboard	

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





### ShelterPoint Main Menu





View Shelter Inventory



# View Shelter Inventory







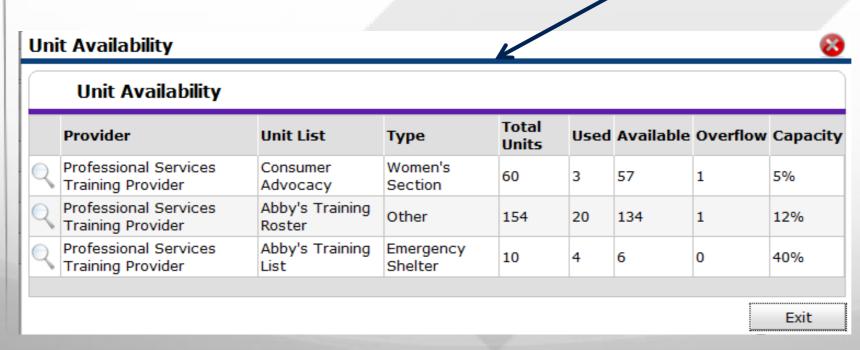


Select a Provider from the drop down list.

**NOTE:** Only Providers with a unit list created will appear.

View Shelter In	entory
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. .

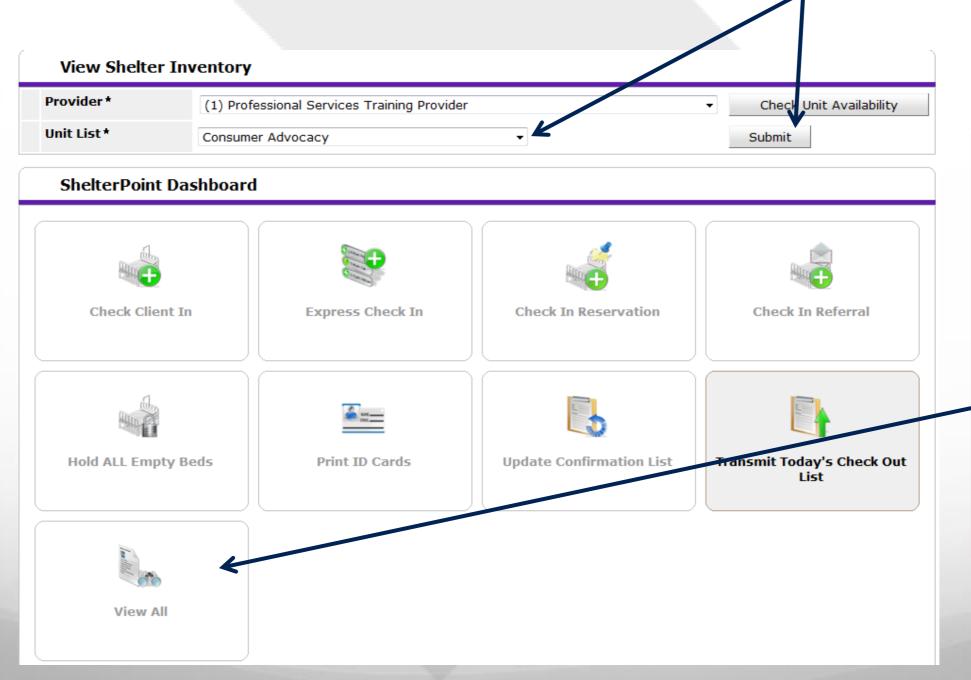








To view detailed information on a specific Unit Select the unit from the drop down list and click on "Submit"



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





"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 Li	ist - Abby's T	raining Li	st								
	Display All Beds ▼ Sort By Floor ▼ Ascending ▼											
	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes		
4	Main	West Wing	Bed 001		(11) Burgess, Abby	03/09/1980	Female	653	No			
4	Main	West Wing	Bed 002		(12) Pickett, Ted			653	No			
6	Main	West Wing	Bed 003		(421) Test, Ladybug				No			
4	Main	West Wing	Bed 004		(205) test, tim	04/15/1977			No			
	Main	West Wing	Bed 005		HELD							
0	Main	West Wing	Bed 006	Hold	EMPTY							
6	Main	West Wing	Bed 007		(422) Test, Bumblebee				No			
6	Main	West Wing	Bed 008	Hold	EMPTY							
6	Main	West Wing	Bed 009		(258) Penzes, Maria				No			
4	Main	West Wing	Bed 010		(199) Smurf, Papa	10/04/1920	Male		No			
0			Overflow (New)		EMPTY							
				S	tart Express Check In	Hold ALL Empt	y Units	Re	elease ALL	HELD Units		





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

Reservations for Unit List - Abby's Training List										
Arriv	/al Date	Client	Date of Birth	Gender	Group ID					
<b>6</b> 09/1	2/2010	test, kid			1405	Cancel Reservation				
Add Rese	Add Reservation Showing 1-1 of 1									

The final section shows all referrals made for shelter stays.

Outstanding Referrals - Professional Services Training Provider (1)

Assistance

Database Development/Maintenance

(11) -

Burgess, Abby

06/22/2010

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



Professional Services

Training Provider (1)



Female

807

03/09/1980





# Enter an Individual into a Unit

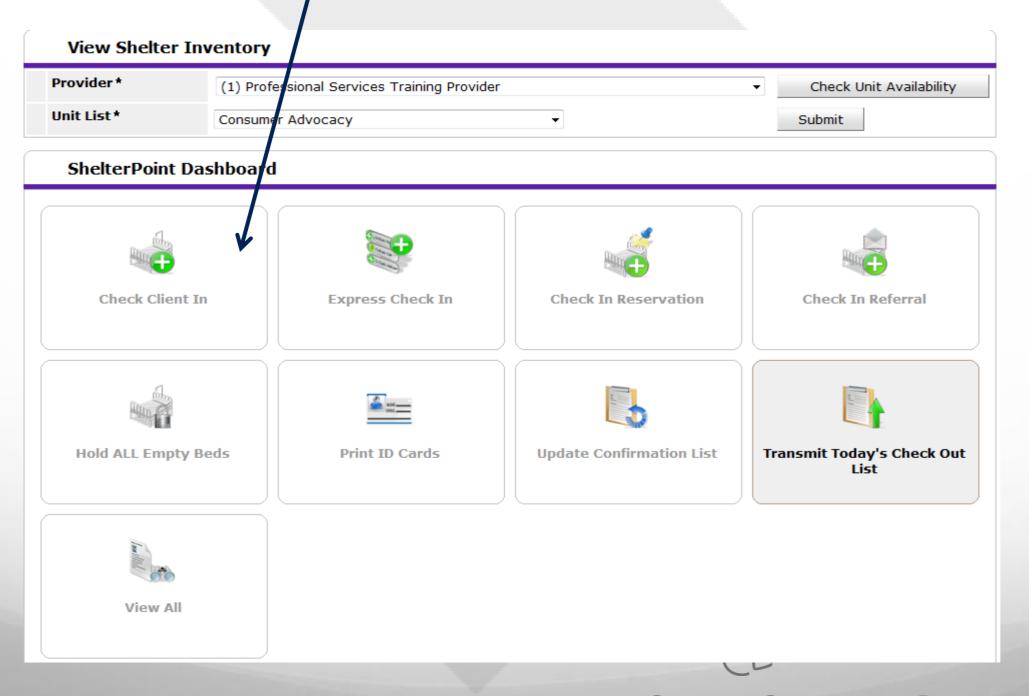








Select the Provider and Unit List you wish to work with then click on "Check Client In"





#### 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.

	Unit Li	st - Abby's T	raining Li	st							
	Display All Beds ▼ Sort By Floor ▼ Ascending ▼										
	Floor	Room	Red	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes	
4	Main	West Wing	Bed 001		(11) Burgess, Abby	03/09/1980	Female	653	No		
4	Main	West Wing	Bed 002		(12) Pickett, Ted			653	No		
6	Main	West Wing	Bed 003	Hold	EMPTY						
6	Main	West Wing	Bed 004	Hold	EMPTY						
6	Main	West Wing	Bed 005	Hold	EMPTY						
Ó	Main	West Wing	Bed 006	Hold	EMPTY						
6	Main	West Wing	Bed 007	Hold	EMPTY						
6	Main	West Wing	Bed 008	Hold	EMPTY						
6	Main	West Wing	Bed 009		(258) Penzes, Maria				No		
4	Main	West Wing	Bed 010		(199) Smurf, Papa	10/04/1920	Male		No		
6			Overflow (New)		EMPTY						

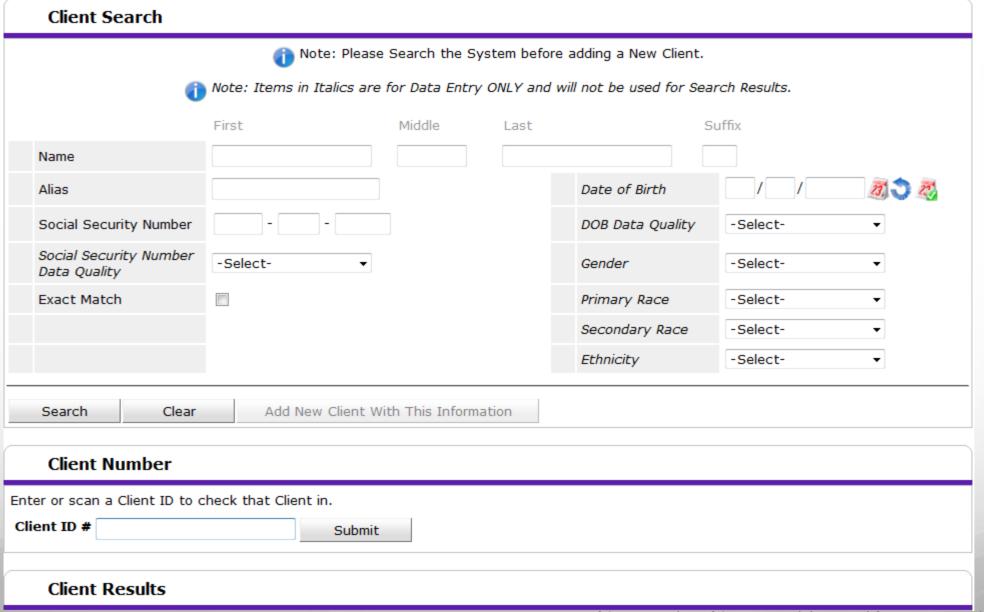








You will perform a Client Search and select the client from the Client Result area or add client information. Client ID number can also be used.







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

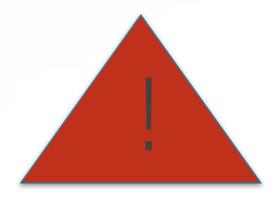
Note: Client Results will not appear if Client ID Number is used. Client ID Number will take the user to the "Unit Entry Data" screen.

	Client Results									
		Name	Social Security Number	Date of Birth	Alias	Gender	Banned			
0		(131) - Chucktest, Second	5423							
•		(206) - test, kid								
•	4	(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.









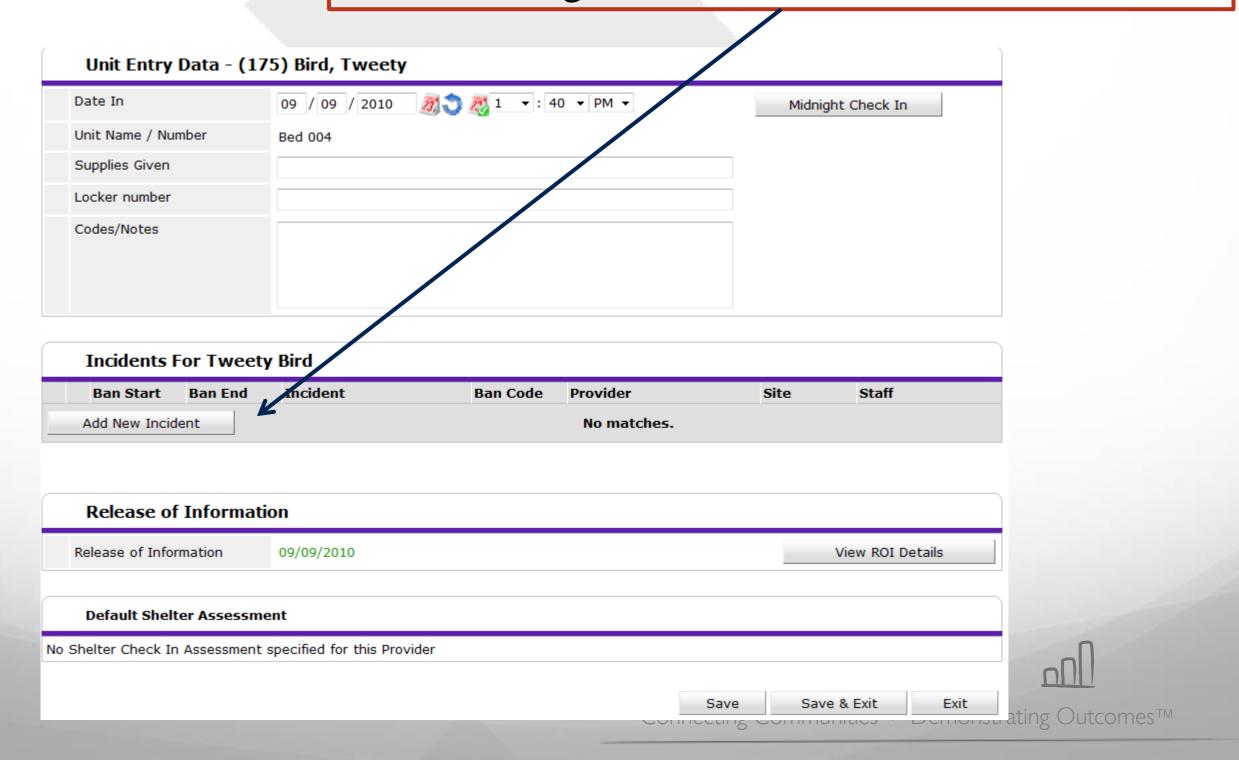
Once a client is selected you will be able to change the time of Check In or select Midnight Check In (11:59 PM) as well as make additional notes.

Unit Entry Data - (17	5) 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					
Ban Start Ban End	Bird Incident	Ban Code	Provider	Site Staff	
		Ban Code	Provider  No matches.	Site Staff	
Ban Start Ban End		Ban Code		Site Staff	<u>a</u>
Ban Start Ban End  Add New Incident		Ban Code		Site Staff  Add Household Data	<u>a</u>
Ban Start Ban End  Add New Incident	Incident	Ban Code			<b>a</b>





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







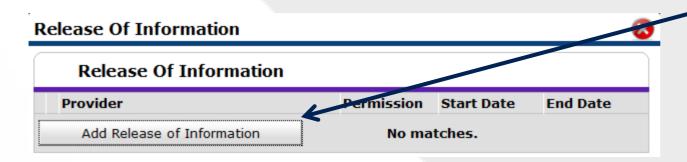
You will then enter the Release of Information if it is appropriate.

Unit Entry Data - (1	75) Bird, Tweety					
Date In	09 / 09 / 2010	1 ▼: 40	) ▼ PM ▼	Mic	dnight Check In	
Unit Name / Number	Bed 004			1		
Supplies Given						
Locker number						
Codes/Notes						
Incidents For Twee	ty Bird Incident	Ban Code	Provider	Site	Staff	
Add New Incident  Release of Information	tion		No matches.			
Release of Information	09/09/2010				View ROI Details	
Default Shelter Assessn	nent					
Shelter Check In Assessmen	specified for this Provider					an a
			COIT	Save S	Save & Exit Exit	ating Outcom

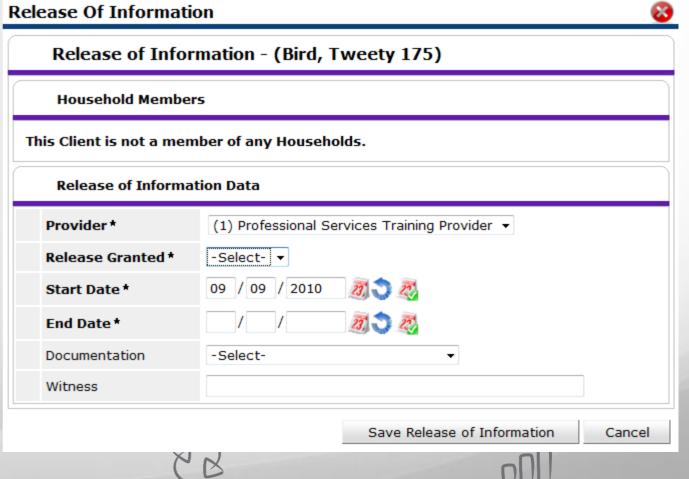




In the pop up window click on "Add Release of Information"



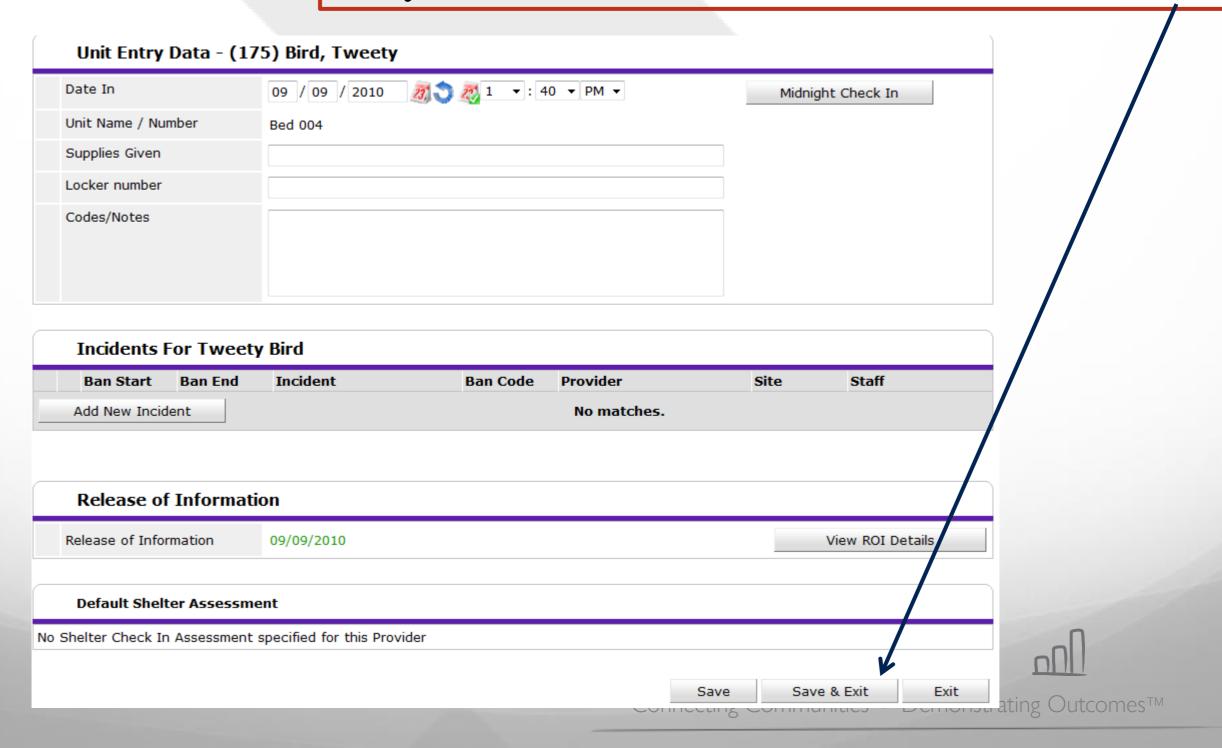
Fill in the Release of Information and Save the Release Information.







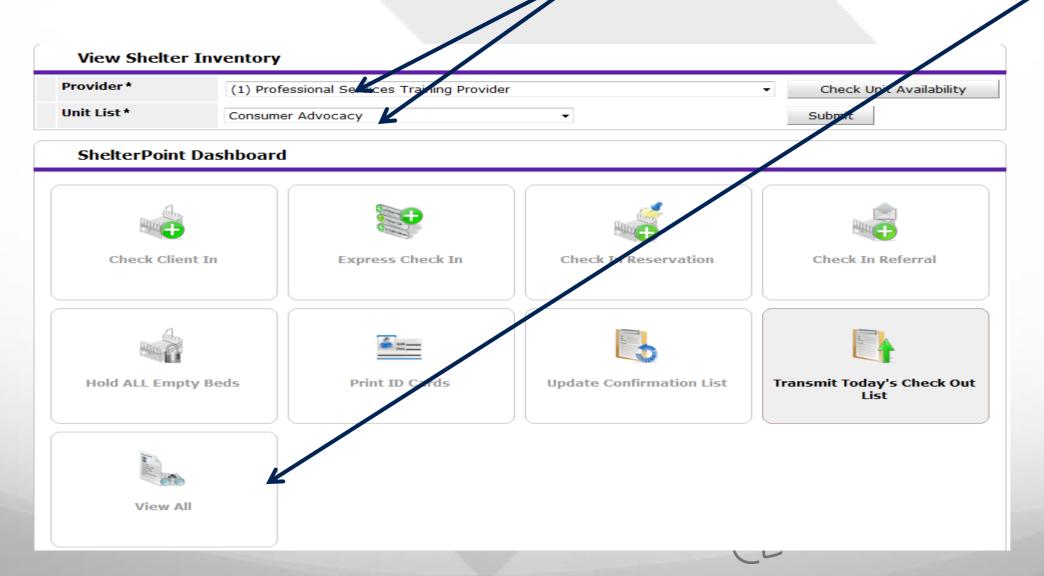
Once you have entered all relevant information save your information at the bottom of the Unit Entry Data screen







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."







# Enter a Household Into a unit

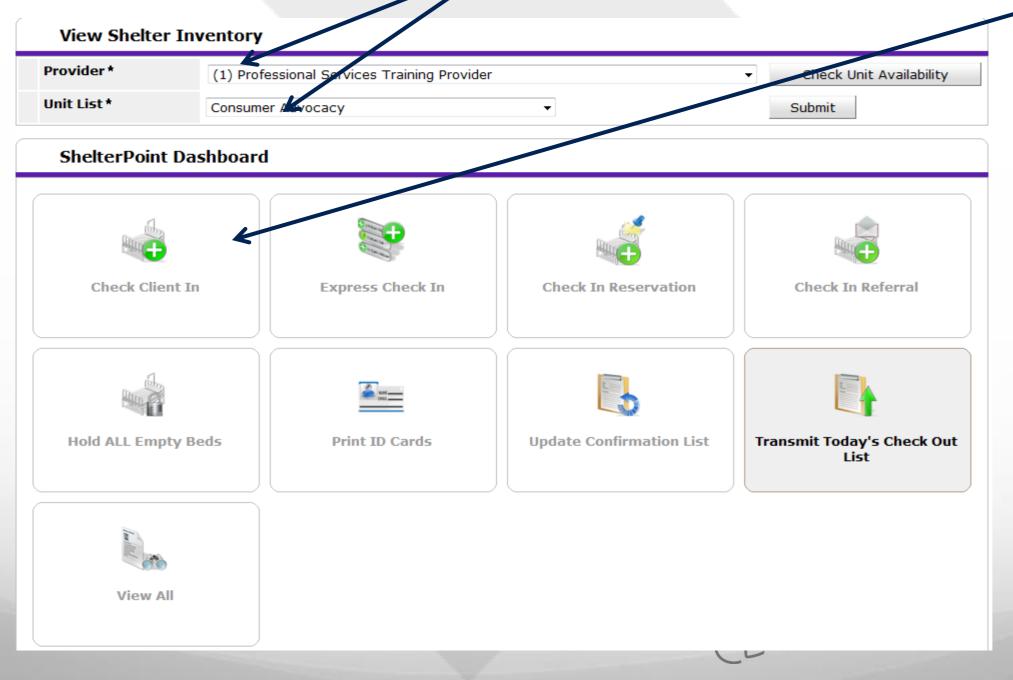








Select the Provider and Unit List you wish to work with then click on "Check Client In"





#### 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.

	Unit List - Abby's Training List											
	Display All Beds ▼ Sort By Floor ▼ Ascending ▼ Sort											
	Floor	Room	Red	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes		
4	Main	West Wing	Bed 001		(11) Burgess, Abby	03/09/1980	Female	653	No			
4	Main	West Wing	Bed 002		(12) Pickett, Ted			653	No			
Ó	Main	West Wing	Bed 003	Hold	EMPTY							
Ó	Main	West Wing	Bed 004	Hold	EMPTY							
6	Main	West Wing	Bed 005	Hold	EMPTY							
6	Main	West Wing	Bed 006	Hold	EMPTY							
6	Main	West Wing	Bed 007	Hold	EMPTY							
6	Main	West Wing	Bed 008	Hold	EMPTY							
6	Main	West Wing	Bed 009		(258) Penzes, Maria				No			
4	Main	West Wing	Bed 010		(199) Smurf, Papa	10/04/1920	Male		No			
6			Overflow (New)		EMPTY							









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.

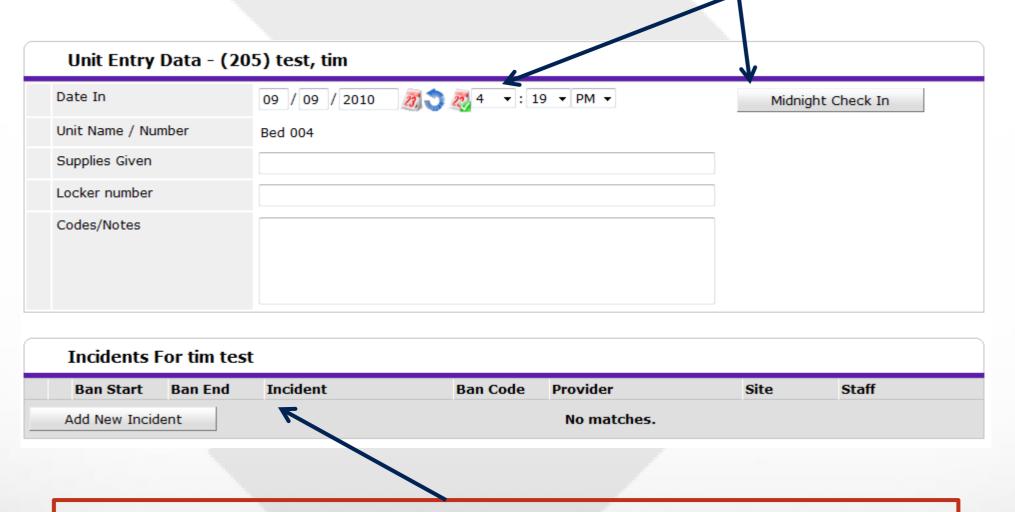
Client Search						
	🕧 Note: Pleas	e Search the Sy	stem before	adding a New Client.		
<b>(</b> 1	Note: Items in Italics are	e for Data Entry	ONLY and w	ill not be used for Sear	rch Results.	
	First	Middle	Last	Su	uffix	
Name						
Alias		]		Date of Birth	/_/	27 3 27
Social Security Number				DOB Data 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 V	Vith This Informa	tion			
Client Number						
Enter or scan a Client ID to	check that Client in.					
Client ID #	Submit					
Client Desults						
Client Results						







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.



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









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										
		Туре		Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income	
	8	Female Single Parent	Н	3					Q	
		test, tim			Self	04/22/2010		Yes		
		test, kid			Son	04/22/2010		No		
		Z 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!

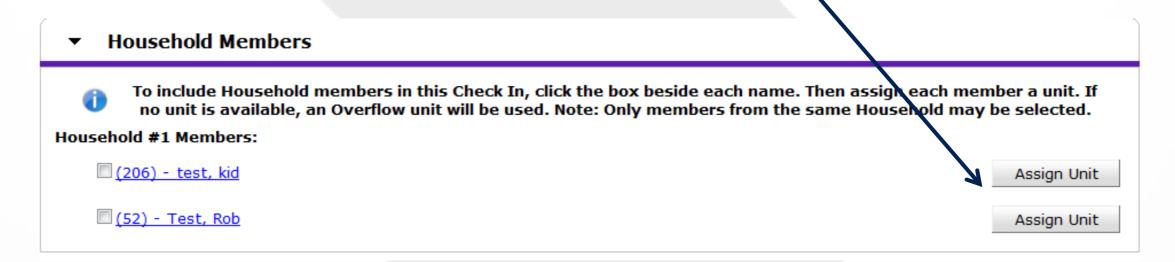


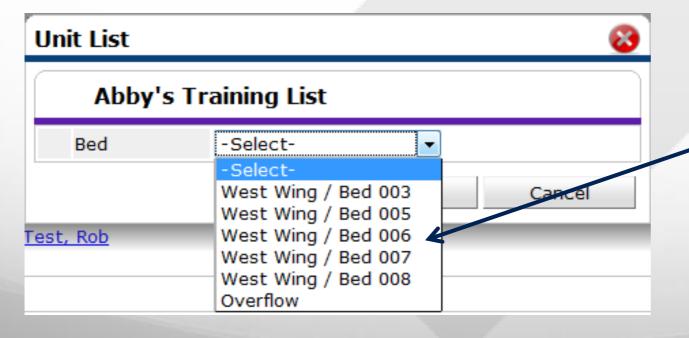






Once the Household information is updated assign each Household member to a Unit by clicking on the "Assign Unit" button.





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

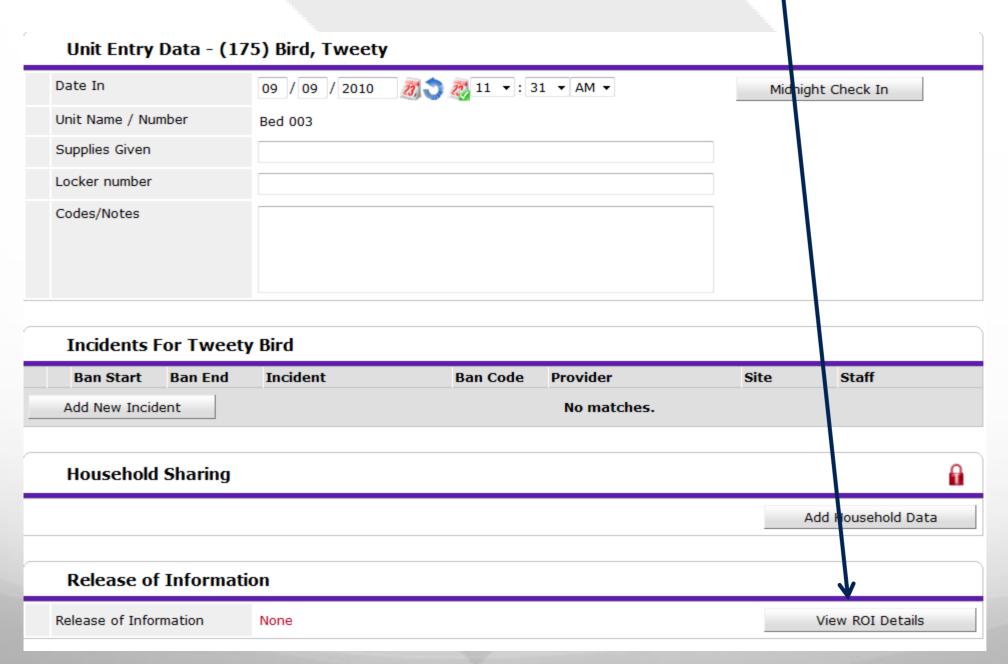








You will then enter the Release of Information if it is appropriate.

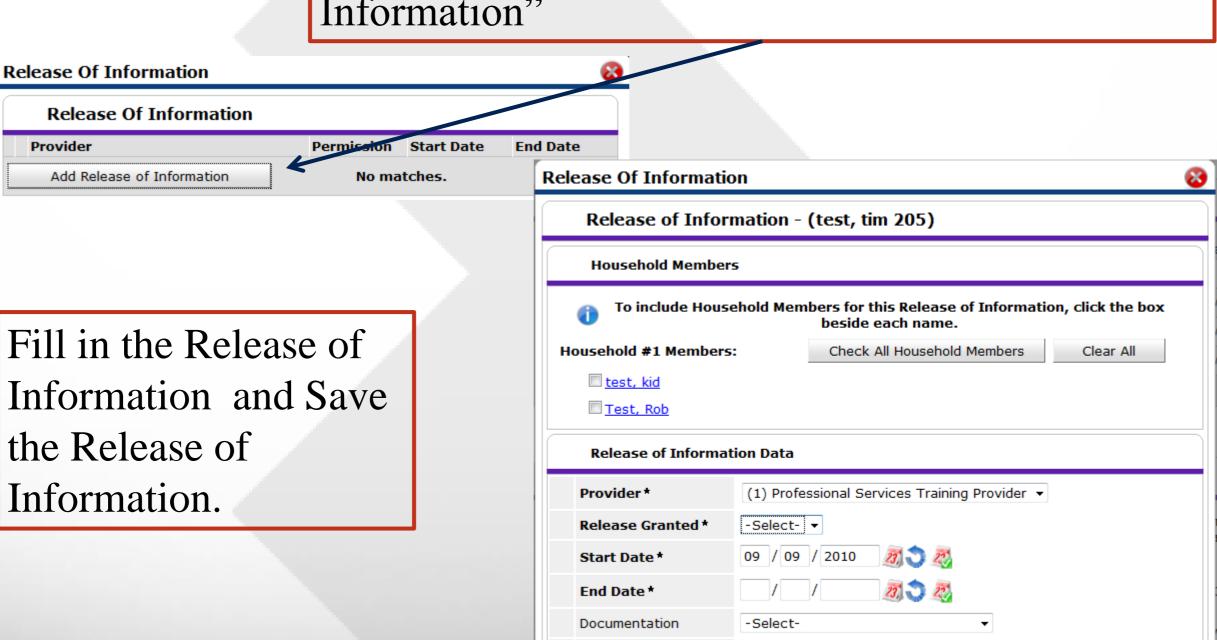








In the pop up window click on "Add Release of Information"



Witness

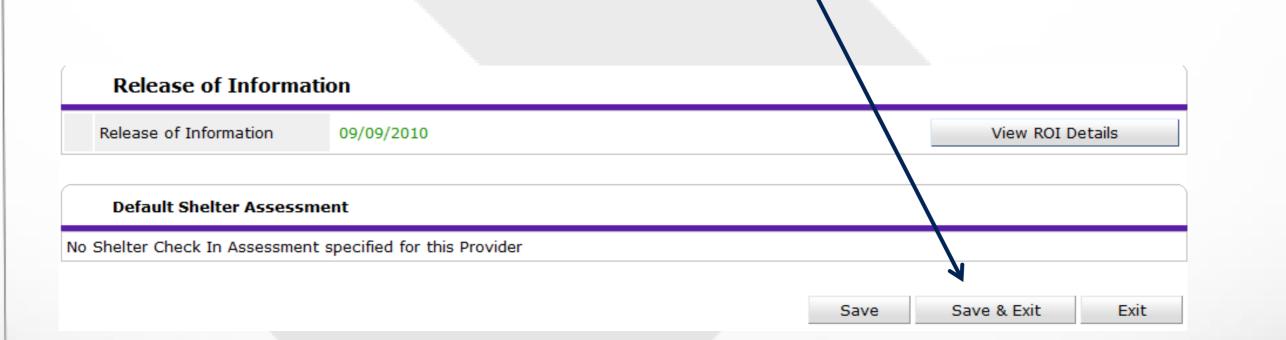
Save Release of Information

Cancel





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.









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."

View Shelter Inventory											
Provider *	(1) Professional Seleces Traini	ng Provider	▼ Check Unit Mailability								
Unit List*	Consumer Advocacy	•	Submit								
ShelterPoint Dashboard											
Check Client	In Express Chec	k In Check In Reser	vation Check In Referral								
Hold ALL Empty	Beds Print ID Ca	Update Confirma	tion List  Transmit Today's Check Out List								
View All											





## Check in Referrals

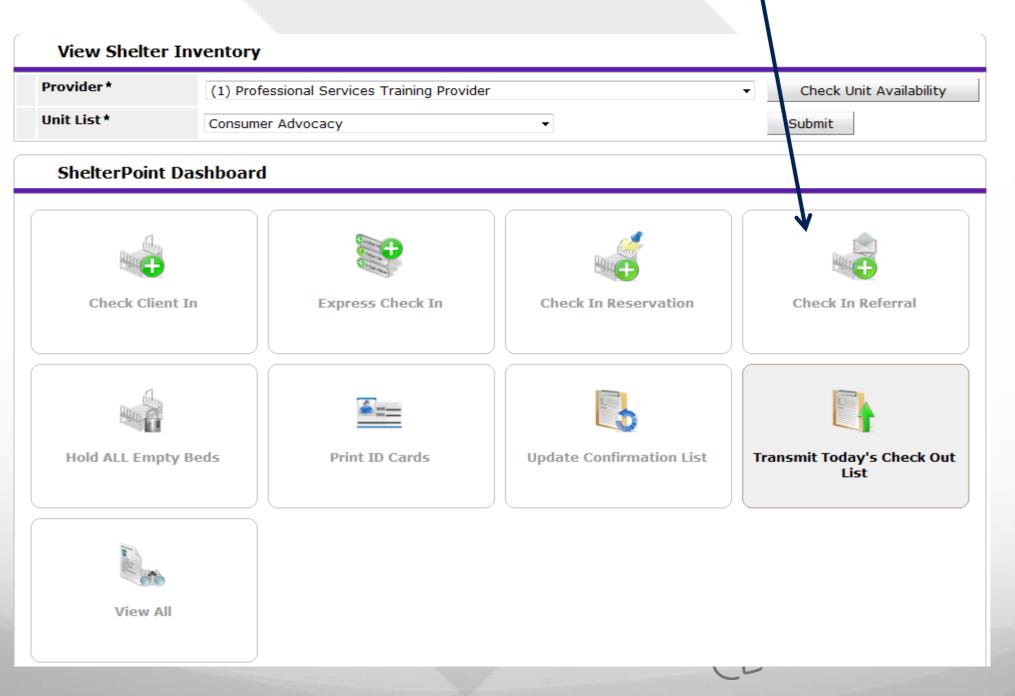






#### Referrals

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





#### 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

•	Outstand	ling Referral	- Professional Services Training Provider (1)
---	----------	---------------	---

Referral	Date Name	Need Type	Referred By	<b>Date of Birth</b>	Gender	<b>Group ID</b>
06/03/2	10 (11) - Burgess, Abby	Database Development/Maintenance Assistance	Professional Services Training Provider (1)	03/09/1980	Female	546
<u>/</u> 🔞 06/22/20	10 (332) - Burgess, Ted	Database Development/Maintenance Assistance	Professional Services Training Provider (1)			807
<b>2</b> 66/22/20	10 (11) - Burgess, Abby	Database Development/Maintenance Assistance	Professional Services Training Provider (1)	03/09/1980	Female	807
<b>2</b> 66/22/20	10 (11) - Burgess, Abby	Database Creation/Management Software Selection	Professional Services Training Provider (1)	03/09/1980	Female	805
<b>2</b> 66/22/20	10 (332) - Burgess, Ted	Database Creation/Management Software Selection	Professional Services Training Provider (1)			805

Showing 1-5 of 5

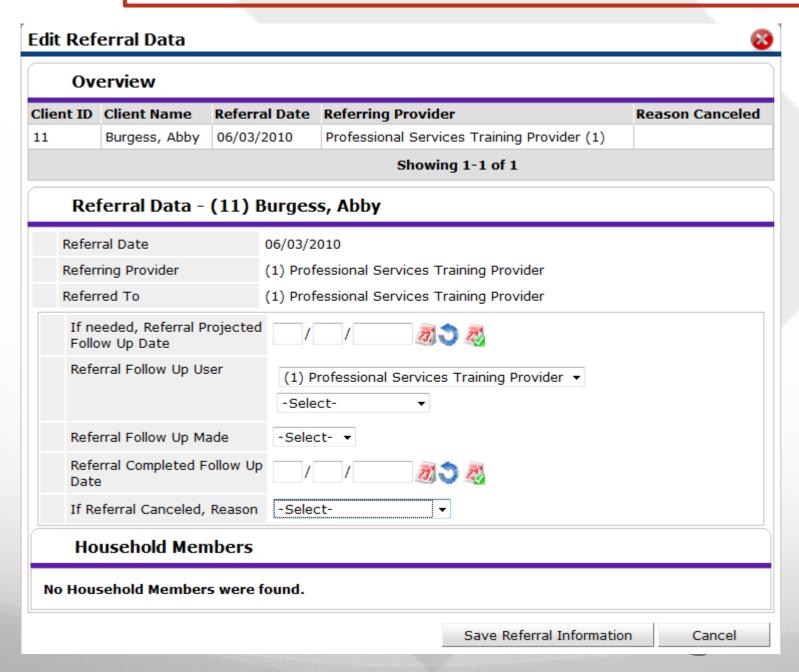








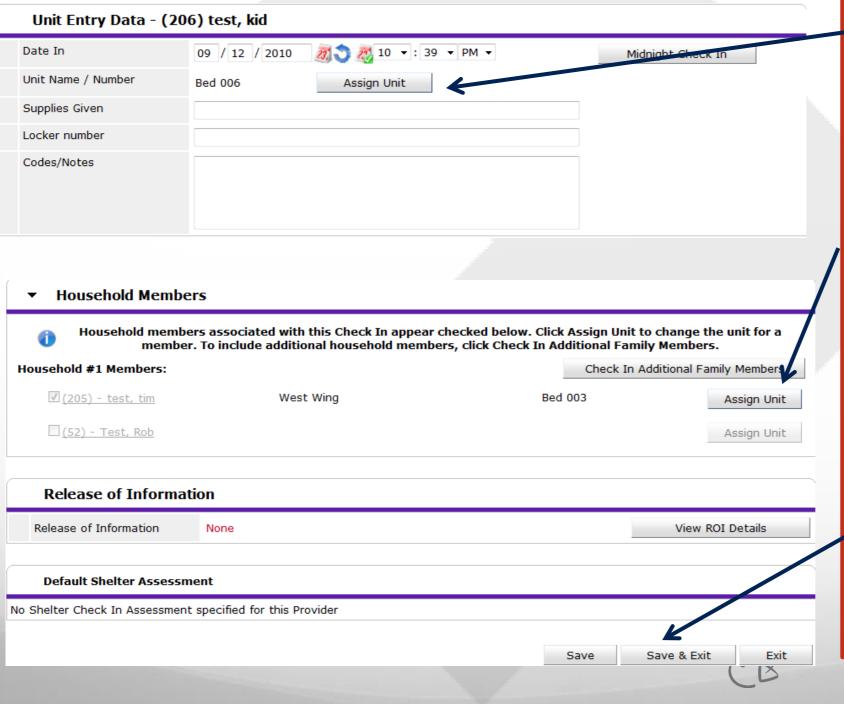
#### Edit Referral will let case managers Edit Referral Data.











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.

Confirmatio n & Check Out List



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

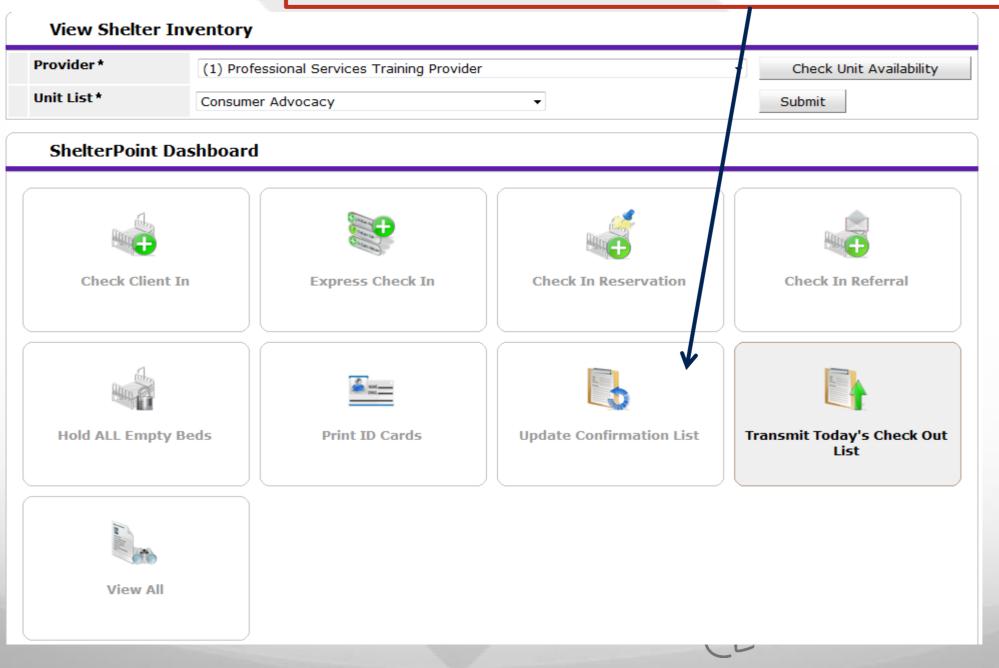






## Confirmation n & Check Out List

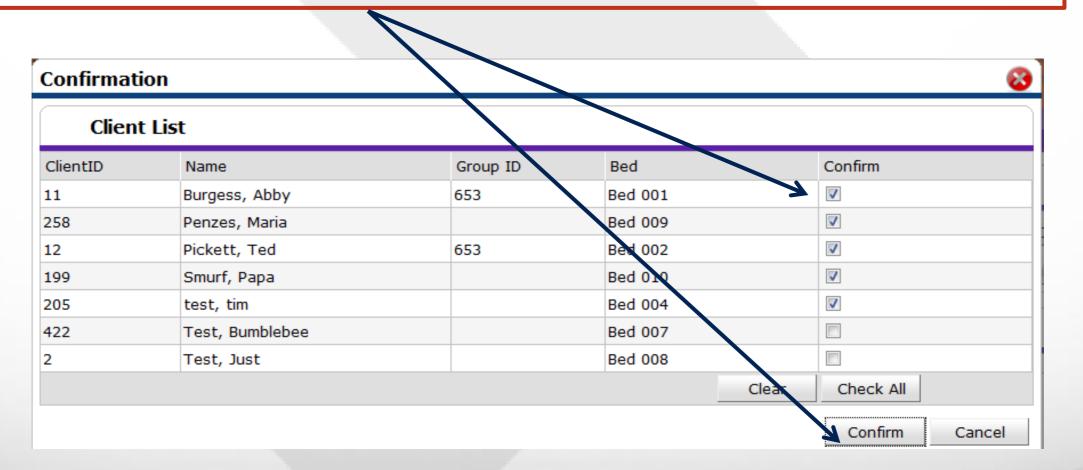
Update Confirmation Lists allows Shelters to confirm clients who will be stay in shelter from one night to the next.







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



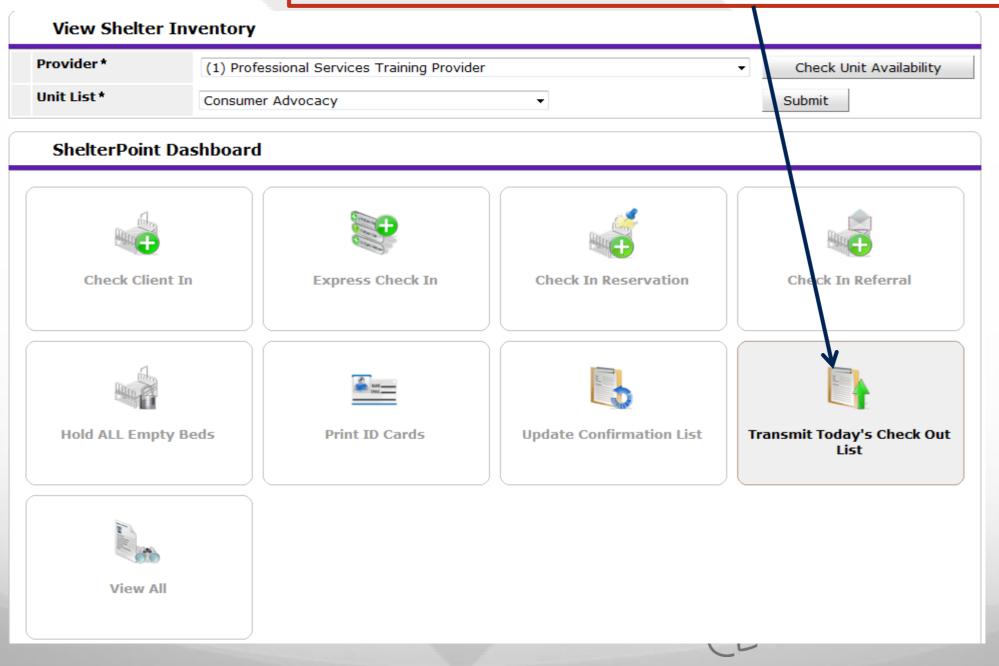






## Confirmation n & Check Out List

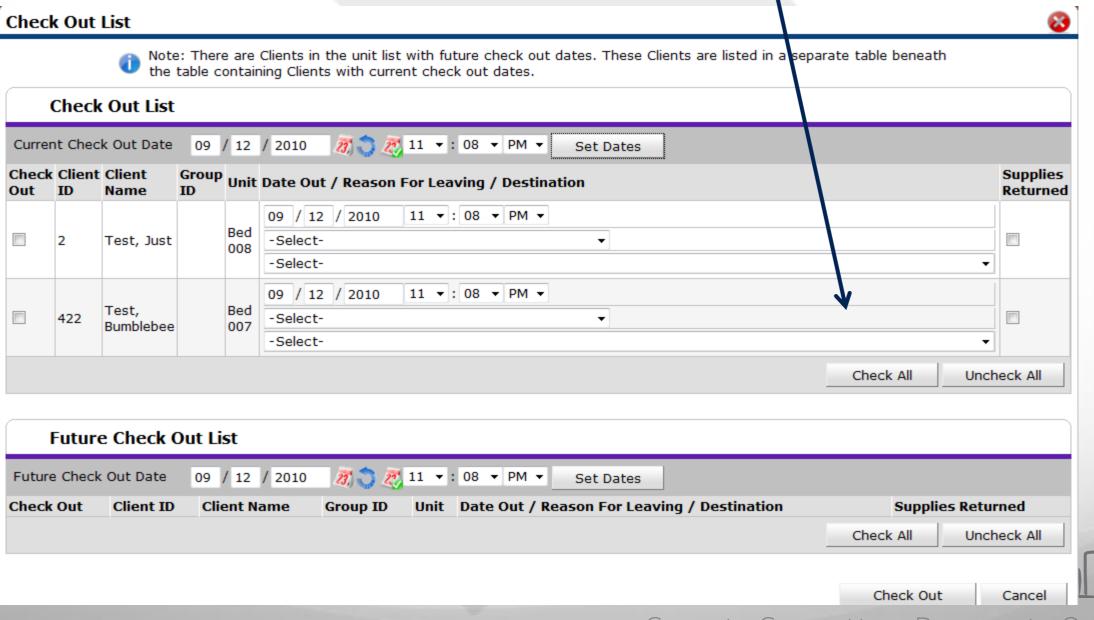
Transmit Today's Check Out List allows shelters to check all clients that have not confirmed an additional night of stay.







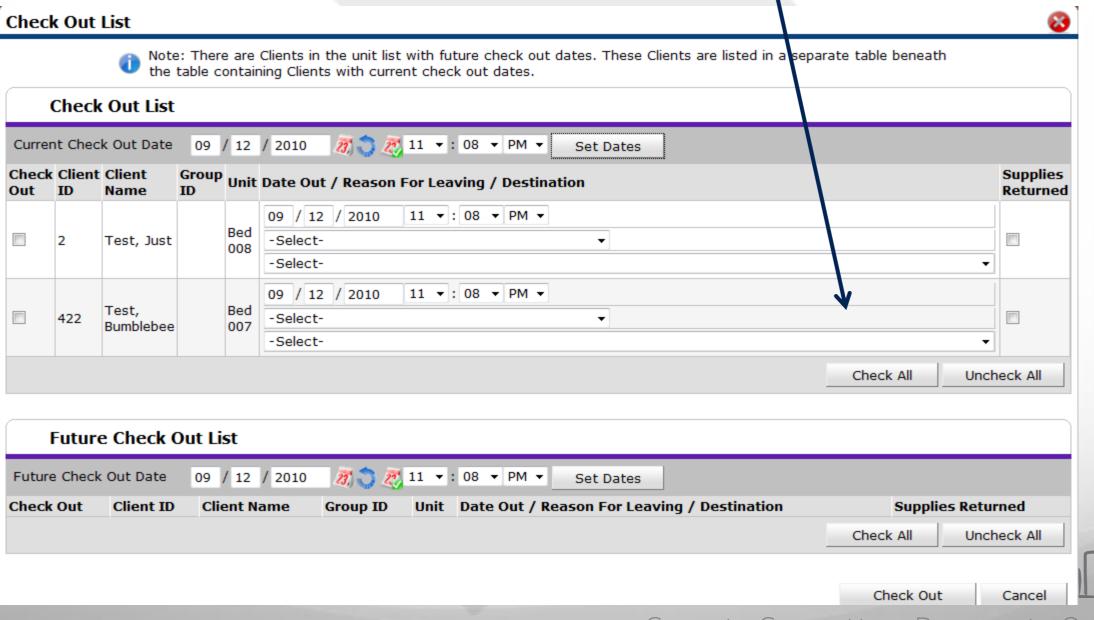
Transmit Today's Check Out List allows shelters to check all clients that have not confirmed an additional night of stay.







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







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

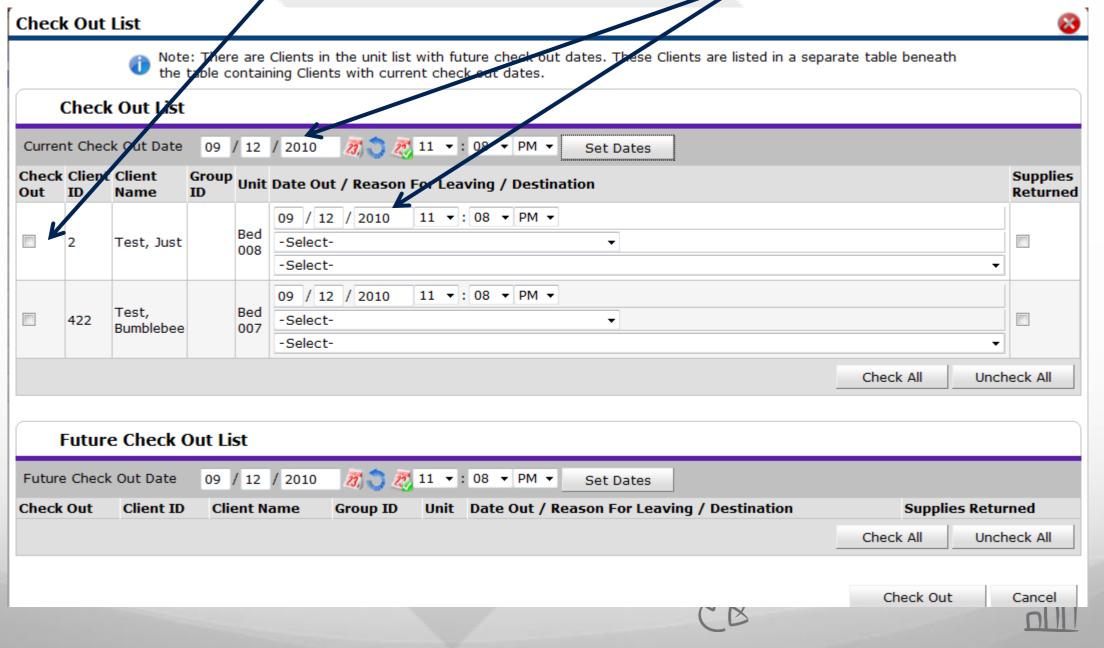








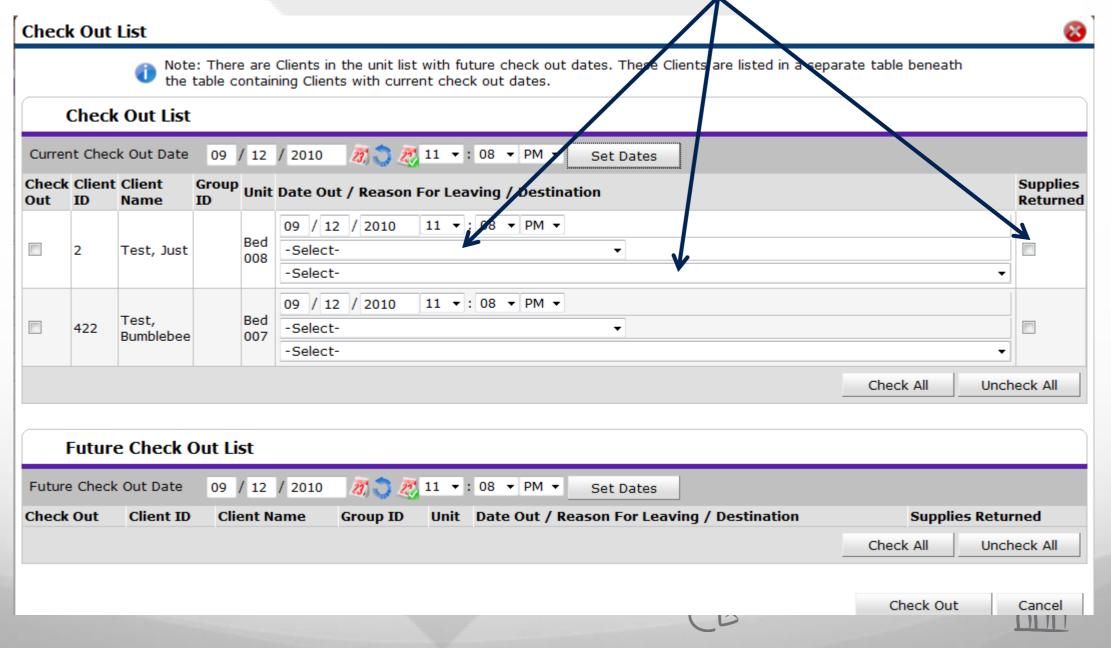
First select clients to check out and then select check out date for the those respective clients.





## Confirmation & Check Out List

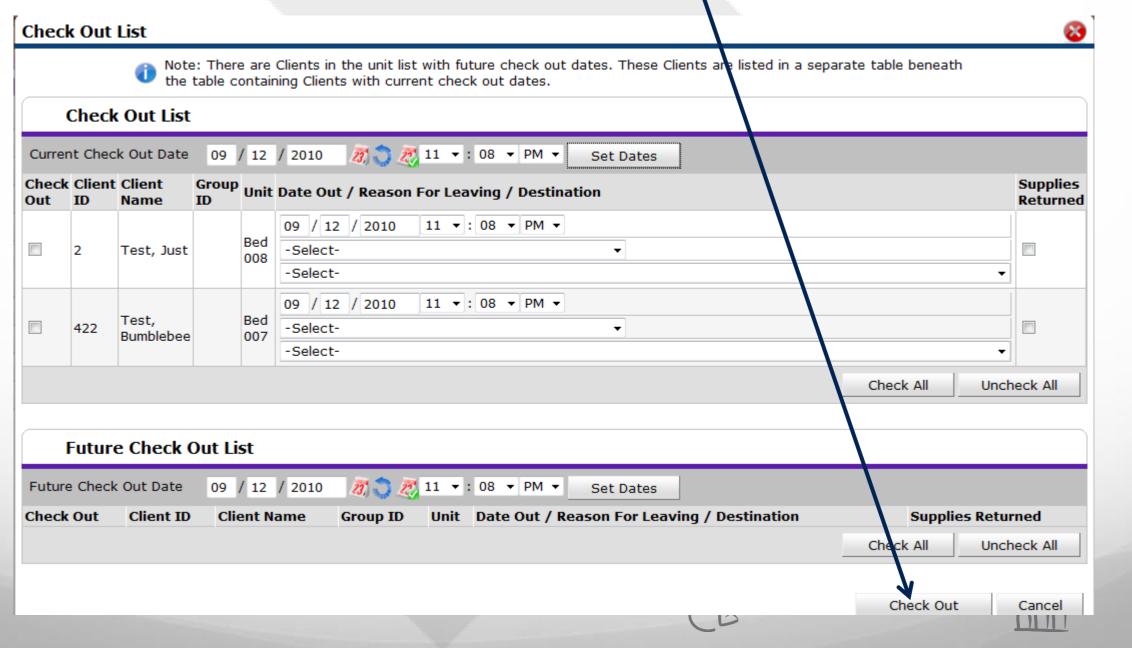
Next, if appropriate, select the Reason for Leaving (top drop down list), Destination (bottom drop down list), and if Supplies were Returned.







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







### **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







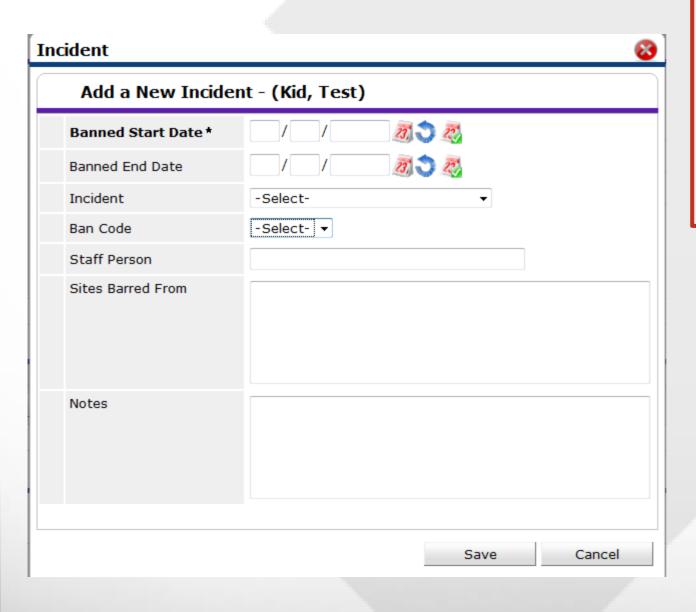


Incidents help case managers identify those clients that have broken rules within their shelter. If shared, incidents alerts other shelters of these bans to help determine if the client is a candidate to be in other shelters. To use Incidents click on "Add Incidents" button at client check in.

			<u></u>	
Incidents For tim test				
Ban Start Ban End Incident	Ban Code	Provider	Site	Staff
Add New Incident		No matches.		









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

-Select- ▼
-Select-
Alcohol
Disagreement with rules/persons
Disrespectful Behavior
Drugs
Non-compliance with program
Non-payment of rent
Nonviolent Criminal activity
Refusal to Participate
Time Limit expired
Violent Behavior
Voucher funds exhausted

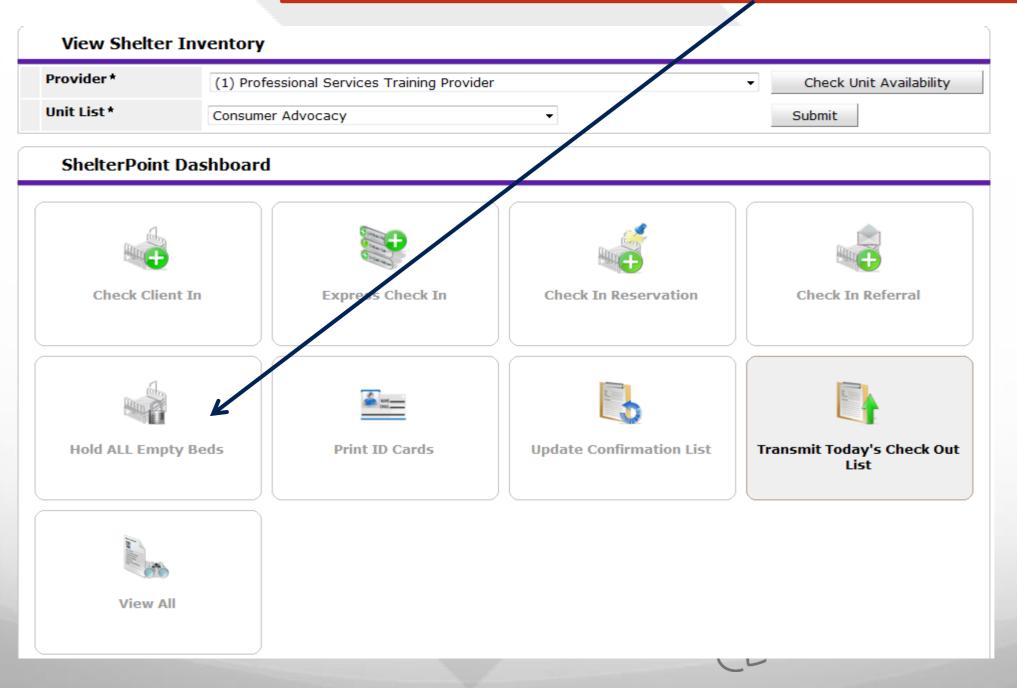








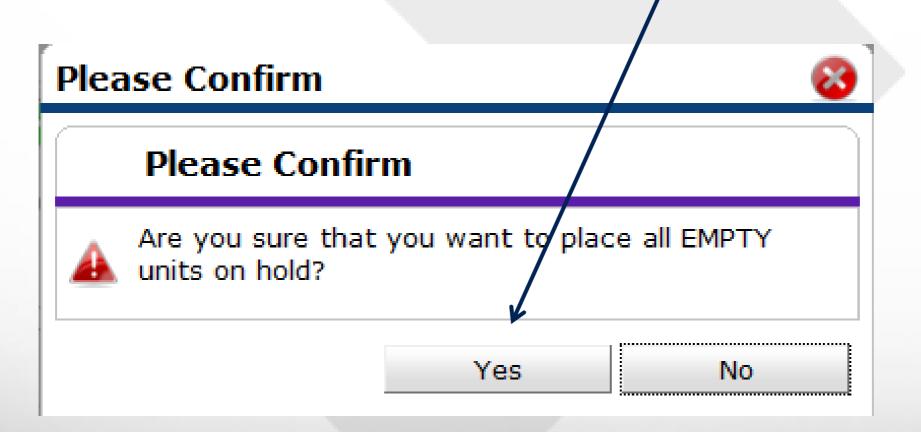
To Hold All Empty Units, click on the corresponding button on the ShelterPoint Dashboard.







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











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.

1

	Unit Li	st - Abby's T	raining Li	st						
			Dis	play All I	Beds ▼ <b>Sort</b>	: By Floor	·	Asce	nding 🔻	Sort
	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Note
6	Main	West Wing	Bed 001		(11) Burgess, Abby	03/09/1980	Female	653	No	
6	Main	West Wing	Bed 002		(12) Pickett, Ted			653	No	
6	Main	West Wing	Bed 003		(421) Test, Ladybag				No	
4	Main	West Wing	Bed 004		(205) test, tim	04/15/1977			No	
	Main	West Wing	Bed 005		HELD K					
	Main	West Wing	Bed 006		HELD					
6	Main	West Wing	Bed 007		(422) Test, Bumblebee				No	
	Main	West Wing	Bed 008		HELD					
6	Main	West Wing	Bed 009		(258) Penzes, Maria				No	
6	Main	West Wing	Bed 010		(199) Smurf, Papa	10/04/1920	Male		No	
6			Overflow (New)		EMPTY					







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 ▼









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	on	∩lu
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	





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	
change the Provider, th	the correct Provider before entering data in the Service List below. If you e page will refresh to make adjustments for the new Provider's Service List 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





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

Provider *	(1) Professional Services Training Provider 🔻
Service Start Date	09 / 12 / 2010 👸 💸
Service End Date	
Services	
Number Service	Status
	Add Another Cancel All





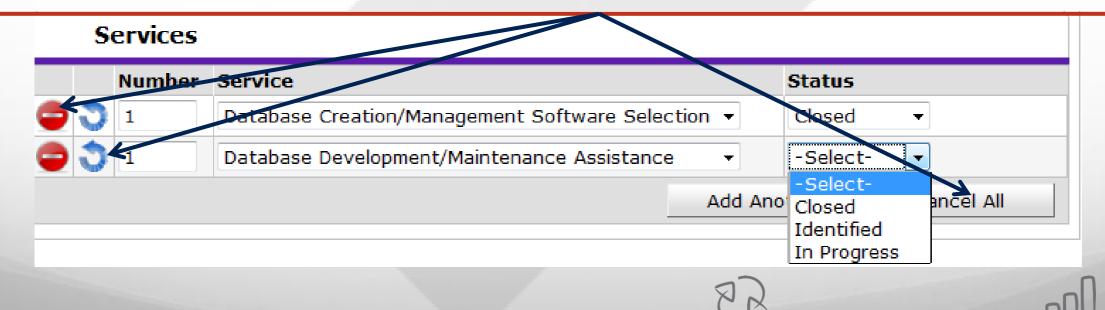




The Case Managers will then select from the number of service instances provided, what the service is and the status of that service.

## Services Number Service Status - Select Add Another Cancel All

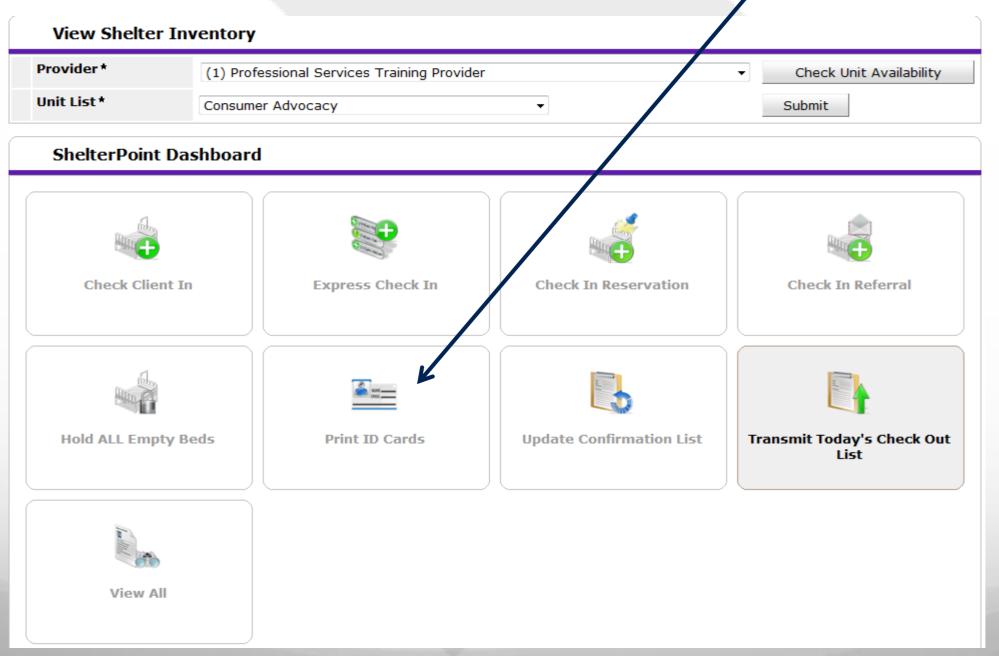
Case Managers may delete the service or cancel all services in this window. Once saved all adjustments must be made in Service Transactions.







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."







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		
	client names to generate ID	cards.
Client List		
Client Name	Alias	Social Security Number
Burgess, Abby	Ms. Abby	
Penzes, Maria		11-11-1112
Pickett, Ted		<b>/</b> -
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 ▼	Pri	nt Client ID Cards Cancel







▶ Last Viewed Favorites
Home
ClientPoint
CallPoint
ResourcePoint
ShelterPoint
ActivityPoint
SkanPoint
GatherPath
Reports
Admin
Logout

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.









▶ Last Viewed Favorites
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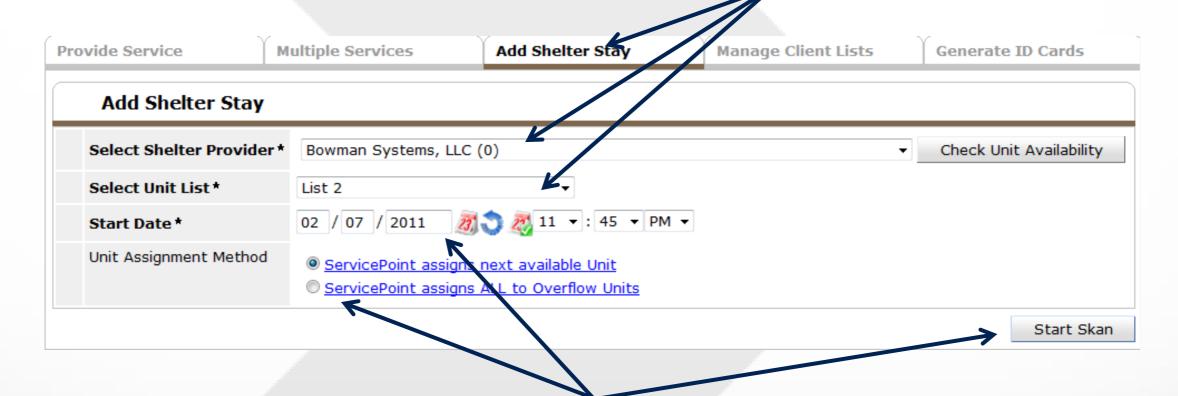








When in SkanPoint select the "Add Shelter Stay" Tab. From Here select the Shelter Provider and the appropriate Unit List for that provider.



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.









Outcomes<sup>™</sup>

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 befo	re adding a New Clier	nt.	
	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 Cod	e communication		





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				
0	2	Test, Just A		888-88-8888					
0	353	Test, Just		111-11-1111					
0	570	Test, Kid B	Bubba	849-75-3411					
	Showing 11-20 of 33 First Previous Next Last								

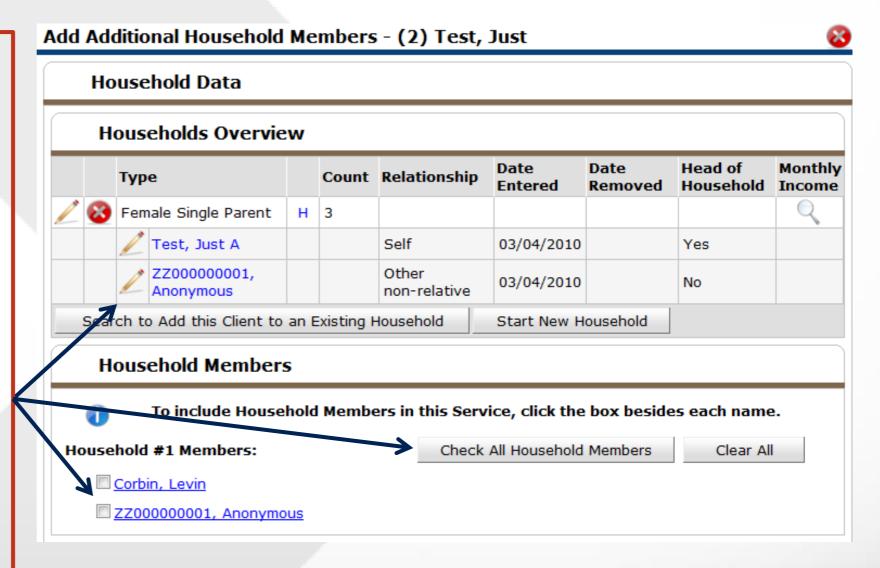








If the selected client has additional Household members, the Household Overview screen will appear. Household maintenance can be performed here as well as selecting the appropriate Household members the Shelter Stay is for.



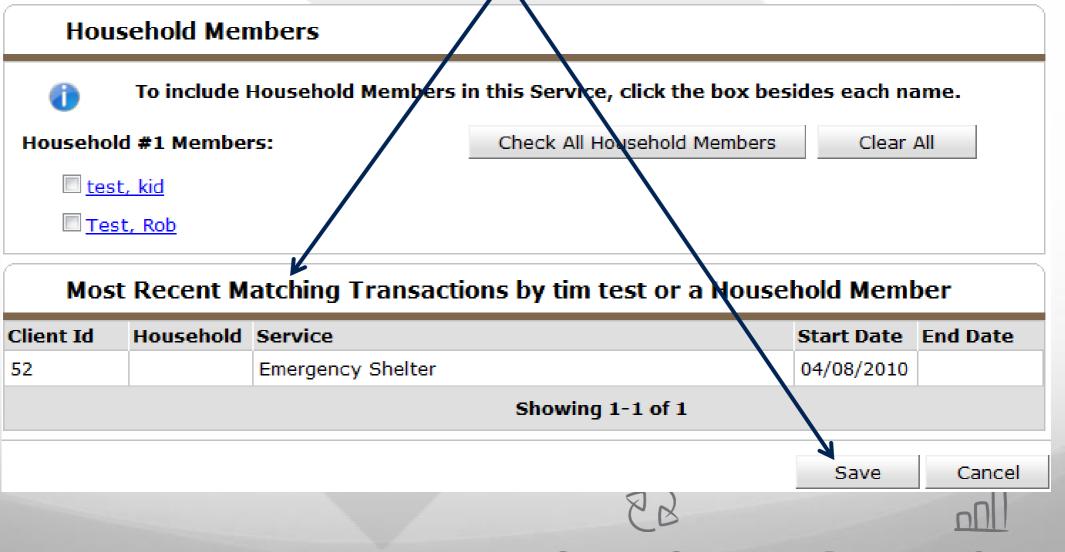








An overview of the most recent matching Transactions by the client that was searched for or by a household member. Select the "Save" button when finished.







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							
]	(D	Client			Alias	Social Security Number	
	206	test, kid					
	205	test, tim			bob		
Remove Last Entry Showing 1-2 of 2							
			Enter Service for Clients	Ente	r Service & Create Ne	w 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.



