# Sioux Empire Network of Care Training Manual

ServicePoint



ShelterPoint



# **Icon Overview**

## Icon Overview refers to specific icons that are throughout SENC System.

	SerivcePoint Icon	SENC Partner Agency
4	Lock Icon	Agency Shared Information
ſu	UnLock Icon	Globally Shared Information
1	Edit Icon	Update / Change Current Information
1	Delete Icon	Remove enteries made in error- ONLY
୍ଦ୍	View Detail Icon	View Attachements
•	Select Icon	Add Selected Information
٢	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
<u>#</u> 3	Date Selection, Reverse, Current Date Stamp Icon	Enter, clear a date or current date stamp {Date format: mm/dd/yyyy}
-	Bed Icon	Shelter Bed Check In

## **Data Measurement Tool**



# **Client Check In**

Figure 1-3

- 1. Click the ShelterPoint tab on the navigation toolbar. (1) The screen will refresh and display the View Shelter Inventory.
- 2. Select your **Provider** or **Program** and a **Unit List**. Click **Submit. (2)** The **Type** will auto populate. The screen will display ShelterPoint Dashboard. (See Figure 1-1)
- 3. Click Check Client In. (3) The Shelter Inventory Information (bed inventory list) will open.



Figure 1-1

- 4. In Shelter Inventory Information area the Unit List (bed list) will display. The Check In icon 🐝 is displayed next to available beds. (See Figure 1-2)
- 5. Click the Check In icon 👒 or the EMPTY hyperlink to assign a client to a bed. The Client Search window will display.

🧀 ShelterPoint > Vie	ew Shelter In	ventory						Type here	e for Global Search		0 🛧 🕜
Last Favorites	View Shelte	er Inventory									
Home	Provider*	Evening Prog	ram - Bishon Dudley Hos	nitality House (4)	beck Unit Availability	1					
ClientPoint			,								
ResourcePoint	Unit List*	Men's Side		✓ St	ibmit						
FundManager	Туре	Men's Section									
ShelterPoint	Chalker True										
SkanPoint	Shelter Inve	entory information									
Reports	Unit List - M	en's Side									
▶ Admin										10	_
Logout	_						Display	All Beds 🗸	Sort By Room	<ul> <li>Ascending</li> </ul>	✓ Sort
	Date In	Room	Floor	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		BDHH Men's	Main	Bed 001	Hold	EMPTY					
	10	BDHH Men's	Main	Bed 002	Hold	EMPTY					
	*0	BDHH Men's	Main	Bed 003	Hold	EMPTY					
	*ô	BDHH Men's	Main	Bed 004	Hold	EMPTY					
	*6	BDHH Men's	Main	Bed 005	Hold	EMPTY					
	10	BDHH Men's	Main	Bed 006	Hold	EMPTY					
	*6	BDHH Men's	Main	Bed 007	Hold	EMPTY					
	*0	BDHH Men's	Main	Bed 008	Hold	EMPTY					
	* <b>6</b>	BDHH Men's	Main	Bed 009	Hold	EMPTY					
	10	BDHH Men's	Main	Bed 010	Hold	EMPTY					
					Figure 1-2	1					

 In Client Search, enter key words such as the first three letters of the first name or last of the client in the Search field. Click Search. The screen will refresh and display a list of matching clients. If necessary, use the advanced search options by clicking Show Advance Search. Click Clear to reset the search fields.

Note: If clients name does not appear. A new client will need to be added in ClientPoint. See Section 1- Adding Client for more information.

7. When the client is located in **Client Results**, click the **Green Plus** icon **v** or click the client's **Name** to assign the client to the selected bed. The **Check In** window will display.

Note: If there is no match for the entered client information, the client must be added to the ServicePoint database before continuing with the shelter check-in. To do this, click the ClientPoint tab and enter a new client using the functionality available in the area.

ShelterPoint > Clier	t Search	Type here for Global Search 🛛 🕕 🛧 🕜
Last Favorites	Client Search	
Home	Please Search the System before additional and the system before additional additionadditionad additionad additionad a	ng a New Client.
ClientPoint		- 10
ResourcePoint	Name Prior Ploto Last	SUTTIX
▶ FundManager	Name Data Quality	
ShelterPoint	Name Data Quarky	
SkanPoint	Alias	
Reports	Social Security Number	
▶ Admin	Social Security Number Data	
Logout	Quality	
	U.S. Military Veteran? -Select-	
	Exact Match	
	Search Clear Add New Client With This Information Add Anonymous Client Client Number	
	Enter or scan a Client ID number to go directly to that Client's profile.	
	Client ID # Submit	

If the client has <u>never</u> stayed in the shelter an alert message that appears. Click Continue to check the client in. (See Figure 1-4)



Figure 1-4

## **Check In- Sub Sections**

#### Nine sub sections make up the Check In area:

- (scroll down to see each sub section) Unit Entry Data Incidents (optional) Household Overview & Household Members Release of Information Entry Data Common Intake Multiple Services Services
- 9. Each section of the **Check In** screen is explained in the following sections.

## Unit Entry Data

1. In Unit Entry Data enter information pertaining to the client and the start of their shelter stay. (See Figure 1-5)

ighthar ShelterPoint > Check	< In			Type here for Global Search		* 🕐
Last Viewed Favorites	Unit Entry Data - (66	) Wilson, Wade D				
Home	Date In*	08 / 11 / 2016 🔊 🎘 2 🗸 : 07 🗸 : 25 🗸 PM 🗸	5	Midnight Check In		
ClientPoint	Unit Name / Number	BDHH Men's / Main / Bed 001		Assign Unit		
FundManag 4	Supplies Given	Hair Brush				
ShelterPoin	Locker number	01				
SkanPoint	Codes/Notes					
Reports      Admin						
Logout				Change Clear		
	Incidents For (66) W	ilson, Wade D				
	Start Date End Date	Incident	Incident Code Provider		Ban Site	Staff
	Add New Incident		No matches.			
		Figure	1-5			

2. The **Date In** field **(4)** will default to the current date and time. To change this date, type the new date in this field in mm/dd/yyyy format. Use the three icons to assist date selection: pick the date from a calendar, clear the date, or use the current date. Change the time using the pick lists. Click the **Midnight Check In** button **(5)** to set the time to 11:59 PM. This is useful if a client checks in after midnight and the stay is to be counted as overnight. The client will be recorded as entering the shelter one minute before midnight even though they might have checked in at 2:00 AM.

- 3. The Unit Name/Number will default to the selected bed. (4)
- 4. Enter any Supplies Given to the client. (4)
- 5. Enter a Locker Number if the client was assigned a locker. (4)
- 6. Use the Codes/Notes field to enter any additional information regarding the client or the stay. (4)
- 7. Click Add New Incident (if necessary). (6)

### Incidents (Optional)

- 1. The **Incidents** area displays the client's status if the client is currently banned from a shelter (or provider) and the reason for the ban.
- 2. Verify that the client is not banned from the shelter before continuing the check-in.
- 3. Click Add New Incident to display the add screen.
- 4. Complete the following fields:
  - a. Banned Start Date and Banned End Date establish the length of the incident.
  - b. Select and Incident from the drop down list.
  - c. Select a Ban Code from the drop down list.
  - d. Enter a Staff Person name.
  - e. List the Sites Barred From.
  - f. Add **Notes** as necessary to describe the incident.
- 5. Click Save to add the incident to the client. Click Cancel to return to the previous screen without adding an incident.

#### Households Overview & Household Members

Use the Households Overview section to manage households from within *ShelterPoint*. Use this section to Add Client to Existing Household or to Start New Household (if necessary). (See Figure 1-6) Use the Households Members section to check in household members.

- 1. Click the Search Existing Households to search for a client within an existing household.
- 2. Click Start New Household to create a new household for client.

Related Information: This process is identical to the Adding Household Members outlined in Section 1.

Households Overview		
	() This Client is not currently a member of any Households.	
Search Existing Households Start New Household		
▼ Household Members		
	This Client is not a member of any Households.	
	Figure 1-6	

## Release of Information (ROI)

1. Use the Release of Information section to add or modify an ROI. (7)

Release of Informa	ion			
Release of Information	Ends 01/01/2099	7	$\rightarrow$	View ROI Details

- 2. Click View ROI Details to display ROIs.
- 3. Click Add Release of Information to add an ROI. (8) Follow Adding ROI process in Sections 1, 2, 3.

	Re	eas	e Of Information				×
		R	elease Of Information				
			Provider	Permission	Start Date	End Date	
		1	Evening Program - Bishop Dudley Hospitality House	Yes	08/11/2016	01/01/2099	ŵ
8 ->		Ad	d Release of Information	Showing	1-1 of 1		
			Figure	e 1-7		Exit	

4. In **Household Members** area- if any of the household members require an ROI, click the checkbox to the left of their name. If the family is large, click **Check All Household Members** to select all checkboxes. Click **Clear All** to reset the checkboxes.

Related Information: This process is identical to the Adding Household Members outlined in Section 1.

- 5. In Release of Information Data complete the following fields:
  - a. Select a **Provider**. This should default to your agency. Click **My Provider** to assign the user's provider. Click **Clear** to reset the field
  - b. Select Release Granted from the drop down list.
  - c. Choose a **Start Date** and **End Date** for the ROI. Use the three icons to assist date selection: pick the date from a calendar, clear the date, or use the current date. **End Date** will always be **01/01/2099**
  - d. Select Documentation from the drop down list.
  - e. Add a **Witness.** (If necessary)
- 6. Click **Save Release of Information** to add the ROIs to the selected clients. (9) Click **Cancel** to return to the previous screen without adding an ROI.

Household Memb	ers
his Client is not a m	ember of any Households.
Release of Inform	nation Data
Provider*	Evening Program - Bishop Dudley Hospitality House Search My Provider Clear (4)
Release Granted*	Yes 🗸
Start Date*	08 / 12 / 2016
End Date*	01 / 01 / 2099 🥂 🖏 🎝 🦓
Documentation	Signed Statement from Client 🗸
Witness	

#### Figure 1-8

#### Entry Data

1. Use the Entry Data section to select the entry Type (1) from the drop down list.

Entry Data	
Provider*	Evening Program - Bishop Dudley Hospitality House (4) 🗸
Type*	Basic 🗸

Figure 1-9

 To change the Entry provider click Search. (2) This will initiate the standard ServicePoint provider search. Select a provider from the search results. Click My Provider to automatically switch to the user's provider. (3) Click Clear to reset the provider field.

## Common Intake (SENC)- \*New Clients MUST complete\*

A Common Intake is a questioniare that must be completed **ONLY** for adult clients (18+). This will ensure common and accurate data is shared througout the SENC. This information is shared among Member Agencies.

1. Complete Common Intake. Follow Complete Common Intake process in Section 1.

# Pay to Stay Program

F

The Pay to Stay Program is designed for clients to pay a weekly or monthly pay fee to secure a bed for that time frame.

- 1. Once the client is checked in to a bed. Return to the **Shelter Inventory Information** (bed inventory). Click on the **client's name.** The *Unit Stay Entry Data* screen will appear. (See Figure 1-10)
- 2. Click Service Transactions tab. (1)

ay Data	Entry / Exit	Release of Information	Service Transactions
Unit Entry Data - (66) W	/ilson, Wade D		
Date In*	08 / 15 / 2016 🕂 🤇 🌡	8 ∨:33 ∨:34 ∨ AM ∨	Midnight Check In
Confirm for Next Day Stay?	No v		
Unit Name / Number	BDHH Men's / Main / Bed 00:	1	Assign Unit
Supplies Given	Hair Brush		
Locker number	01		
Codes/Notes			
			Change Clear

3. Click Shelter Stays. (2) Click the Edit Icon Z next to the shelter stay that will be Pay-to- Stay. (3) (See Figure 1-11)

Stuy Dutu Entry / Ext	t Release of Info	ormation Service Tran	isactions
Needs Services	Referrals	Shelter Stays	
Previous Shelter Stays			
Select Dates Start Date	End Date	ar 🗅 ar	Control
Start Date End Date Provider	U <sup>1</sup>	Jnit List Unit Name / Number	Type
V 🗑 08/15/2016 Evening P Hospitality	rogram - Bishop Dudley M y House Si	Men's Bed 001 Side	Men's Section
	Showing 1-1 of	F 1	
Delete This Shelter Stay Jump to	Profile	Save Save & Exit	Exit

- 4. The **Date In** will default to the current date. (4) Enter the anticipated end date (check out) for the clients stay in the **Date Out** area. (4)
- 5. Click **Save** to return to the Unit Stay Entry Data Screen or Click **Save & Exit** to return to the Unit List (bed list) screen. (See Figure 1-12).

-			Y		Y		Υ
	Stay	Data	L L L	entry / Exit		Release of Information	Service Transact
	Nee	eds		Services		Referrals	Shelter Stays
		Previous	Stay Data				×
	Sel	Ove	rview				
		Client ID	Client Name	Referral Date	Referring P	rovider	Reason Canceled
	/	66	Wilson, Wade D	2	Evening Pro Hospitality H	gram - Bishop Dudley Iouse (4)	
	4				Sho	wing 1-1 of 1	
	1	Pre	vious Stay D	ata - (66) Wi	son, Wade	: D	
	Del	Provid	er	(4) Evening Pro	gram - Bishop	Dudley Hospitality House	
		Servio	e	(BH-1800.8500)	Homeless Sl	helter	
	11	Date	in*	08 / 15 / 201	5 🕂 🕽 🎝	8 v: 33 v: 34 v AM	
-4	Ы	Date	Dut		27 🔿 Z		~
	•					g	Save Cancel

6. The clients with future check out dates will have an asterisk around their name. (5) This will indicate that there is a future check out date listed for this clients shelter stay. (See Figure 1-13)

	Shelter Inventory Information										
ſ	Unit List ·	Men's Side									
			Display All Beds 🗸 Sort By Room 🗸 Ascending 🗸 Sort						Sort		
	Date In	Room	Floor	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
N.	08/11/2016	BDHH Men's	Main	Bed 001		*(66) Wilson, Wade D*	08/01/1980	Male		No	
and a	š	BDHH Men's	Main	Bed 002	Hold	EMPTY					
	5	BDHH Men's	Main	Bed 003	Hold	EMPTY					
and a	Š	BDHH Men's	Main	Bed 004	Hold	EMPTY					
						Figure 1-13					

# **Check In- Using Reservations for Unit List**

Reservations are made for SENC clients that are pending arrival at a shelter. When reserving a bed you must click Hold in the Unit List to secure that reserved bed.

1. In the Reservation for Unit List area- Click Add Reservation. (1) (See Figure 1-14)

Reservations for Unit List - Mer	eservations for Unit List - Men's Side										
Arrival Date	Name	Date of Birth	Gender	Group ID							
Add Reservation			No matches.								
		Fi	gure 1-14								

In Client Search, enter key words such as the first three letters of the first name or last of the client in the Search field. Click Search. The screen will refresh and display a list of matching clients. If necessary, use the advanced search options by clicking Show Advance Search. Click Clear to reset the search fields. (See Figure 1-14) See Section 1- Adding Client for more information.

Note: If clients name does not appear. A new client will need to be added in ClientPoint before reservation can be made. See Section 1- Adding Client for more information.

3. Once client located in the Client Search area- Click on Add Client icon **Data** or click the clients name. Unit Reservation **Data** screen will appear. Click **Save**. (See Figure 1-15) Clients name will now appear in the Reservation for Unit List.

Uni	t Reservation Data - (66) W	Vilson, Wade D		×							
м	Reservation Date* 08	19 / 2016 🛛 🔊 💐									
м м	Households Overview										
Household Members Associated with this Reservation											
This Client is not a member of any Households.											
Incidents For (66) Wilson, Wade D											
Sta	art Date End Date Incident	Incident Code Provider	Ban Site	Staff							
n	Add New Incident	No matches.									
			Save	Cancel							

#### Figure 1-15

- 4. Click on the Bed/Green Plus icon is or HOLD to secure that listed reservation. (See Figure 1-16)
- 5. Access the **Reservations for Unit List** and click the **Bed/Green Plus** icon to assign a client to a bed. To add a <u>NEW</u> reservation- click **Add Reservation**. (See Figure 1-16)
- 6. Follow Client Check In process on page 3.

** <b>0</b>	BDHH Men's	Main	Bed 074	Hold	EMPTY								
	BDHH Men's	Main	Bed 075		HELD								
	BDHH Men's	Main	Bed 076		HELD								
	BDHH Men's	Main	Bed 077		HELD								
BICO	BDHH Men's	Main	Bed 078	Hold	EMPTY	EMPTY							
*	BDHH Men's	Main	Bed 079	Hold	EMPTY								
Rec C	BDHH Men's	Main	Bed 080	Hold	EMPTY								
-			Overflow (New	)	EMPTY								
Print Unit List							Start Express	Check In	Hold ALI	L Empty Units	Relea	se ALL HELI	D Units
Reservations for Unit List - Men's Side													
Arr	ival Date	Name				Date of Birth		Gender	G	roup ID			
08,	23/2016	(66) Wilso	n, Wade D			08/01/1980		Male				Cancel Res	ervation
Add Res	ervation						Showing 1-1 of	1					

Figure 1-16