Sioux Empire Network of Care
Training Manual

ServicePoint

SECTION 4

ShelterPoint

If you have any questions contact Riley Amundson at 605-274-1446 or sen@helplinecenter.org
## Icon Overview

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

<table>
<thead>
<tr>
<th>Icon Representation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="ServicePoint Icon" /></td>
<td>SENC Partner Agency</td>
</tr>
<tr>
<td><img src="image" alt="Lock Icon" /></td>
<td>Agency Shared Information</td>
</tr>
<tr>
<td><img src="image" alt="UnLock Icon" /></td>
<td>Globally Shared Information</td>
</tr>
<tr>
<td><img src="image" alt="Edit Icon" /></td>
<td>Update / Change Current Information</td>
</tr>
<tr>
<td><img src="image" alt="Delete Icon" /></td>
<td>Remove entries made in error - ONLY</td>
</tr>
<tr>
<td><img src="image" alt="View Detail Icon" /></td>
<td>View Attachments</td>
</tr>
<tr>
<td><img src="image" alt="Select Icon" /></td>
<td>Add Selected Information</td>
</tr>
<tr>
<td><img src="image" alt="Remove Icon" /></td>
<td>Removed Selected Information</td>
</tr>
<tr>
<td><img src="image" alt="Notes Icon" /></td>
<td>Add Note</td>
</tr>
<tr>
<td><img src="image" alt="Date Selection, Reverse, Current Date Stamp Icon" /></td>
<td>Enter, clear a date or current date stamp [Date format: mm/dd/yyyy]</td>
</tr>
<tr>
<td><img src="image" alt="Bed Icon" /></td>
<td>Shelter Bed Check In</td>
</tr>
</tbody>
</table>

### Data Measurement Tool

**< 91 - 360 Days >**

```
<table>
<thead>
<tr>
<th>Over 360 Days</th>
<th>90 Days or Less</th>
<th>90 Days or Less</th>
<th>90 Days or Less</th>
<th>90 Days or Less</th>
</tr>
</thead>
</table>
```
**Client Check In**

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](image1)

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.

![Figure 1-2](image2)

6. 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 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.*

![Figure 1-3](image3)
8. If the client has **never** stayed in the shelter an alert message that appears. Click **Continue** to check the client in. (See Figure 1-4)

![Figure 1-4](image)

**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)

![Figure 1-5](image)

2. The **Date** 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.

Release of Information (ROI)

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

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.

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.

![Figure 1-8](image)

**Entry Data**

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

![Figure 1-9](image)

2. 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 questionnaire that must be completed **ONLY** for adult clients (18+). This will ensure common and accurate data is shared throughout 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

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)
3. Click Shelter Stays. (2) Click the Edit Icon next to the shelter stay that will be Pay-to-Stay. (3) (See Figure 1-11)
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).
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 client’s shelter stay. (See Figure 1-13)

![Figure 1-13](image)

**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)

![Figure 1-14](image)

2. 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 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.

![Figure 1-15](image)
4. Click on the Bed/Green Plus icon  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 NEW reservation- click Add Reservation. (See Figure 1-16)

6. Follow Client Check In process on page 3.

![Figure 1-16](image-url)