Sioux Empire Network of Care Training Manual

ServicePoint

SECTION 4

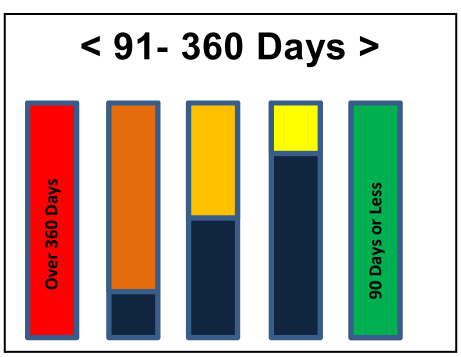
ShelterPoint

Icon Overview

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

	SerivcePoint Icon	SENC Partner Agency
	Lock Icon	Agency Shared Information
	UnLock Icon	Globally Shared Information
	Edit Icon	Update / Change Current Information
	Delete Icon	Remove enteries made in error- ONLY
	View Detail Icon	View Attachements
	Select Icon	Add Selected Information
	Remove Icon	Removed Selected Information
	Notes Icon	Add Note
	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

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.

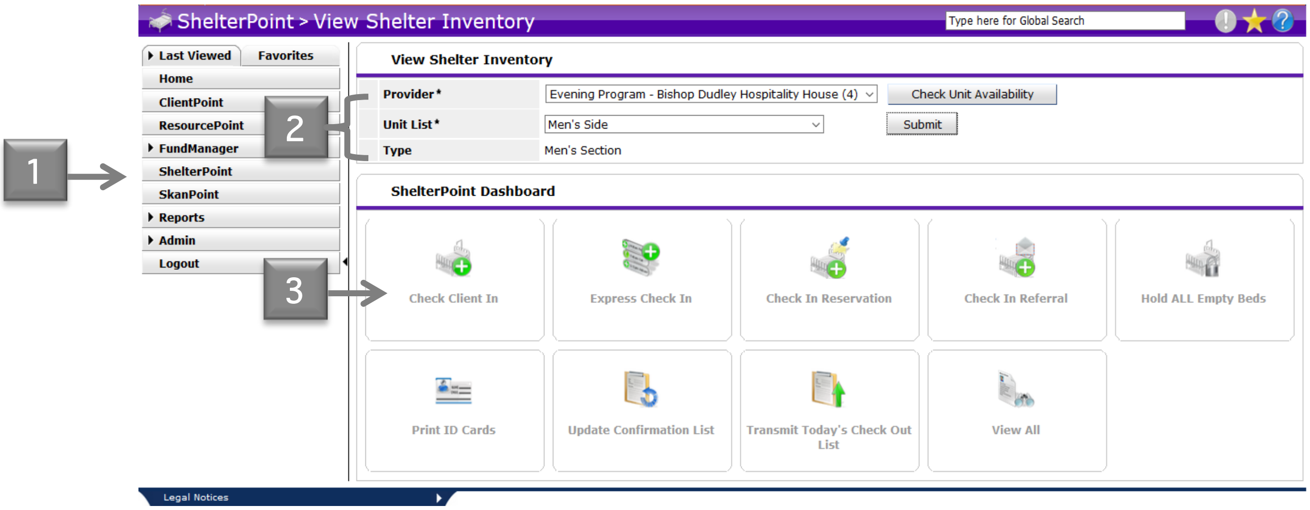


Figure 1-1

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.

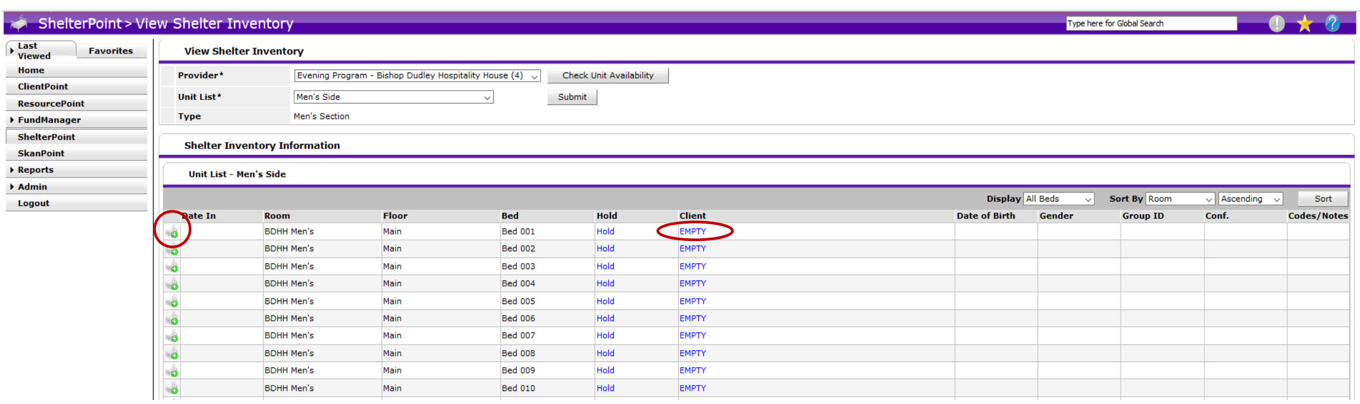


Figure 1-2

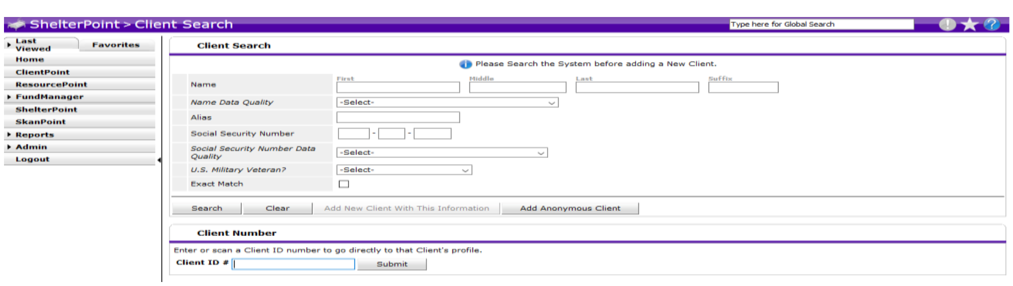
6. In **Client Search**, enter key words such as the first three letters of the first name or last of the client in the **Search** field. Click **Search**. The screen will refresh and display a list of matching clients. If necessary, use the advanced search options by clicking **Show Advance Search.**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

Note: *If clients name <u>does not</u> 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



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)

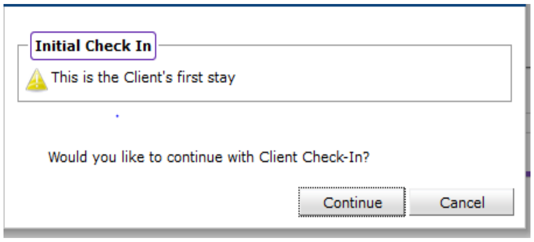


Figure 1-4

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)

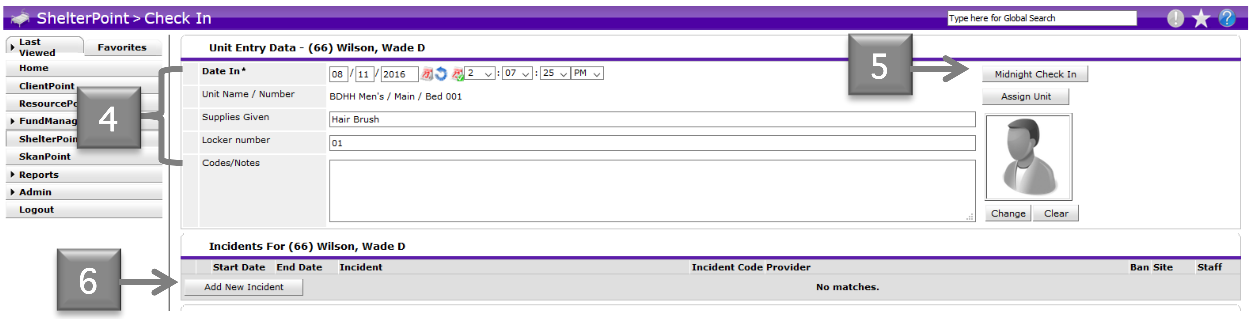


Figure 1-5

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.

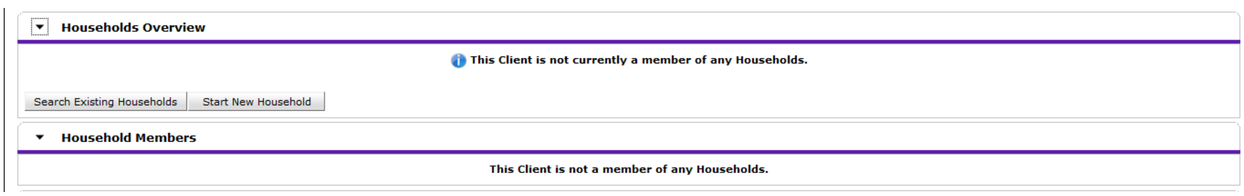


Figure 1-6

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.

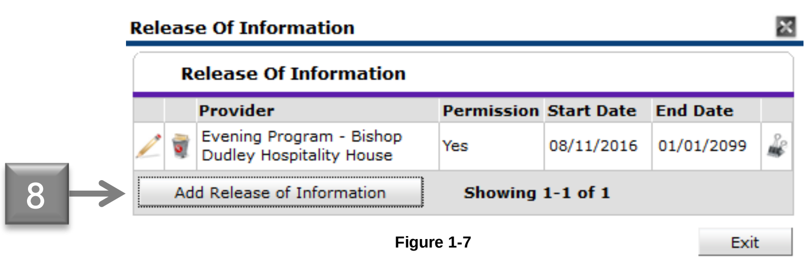


Figure 1-7

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.

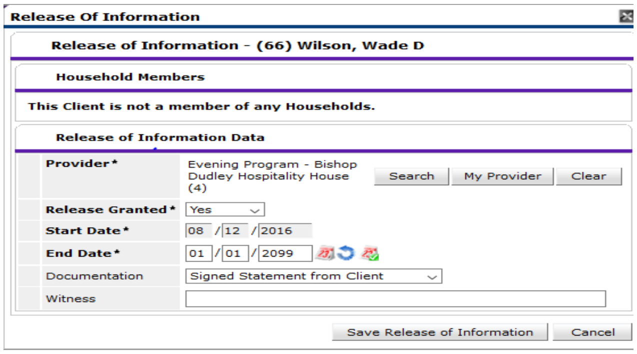


Figure 1-8

Entry Data

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

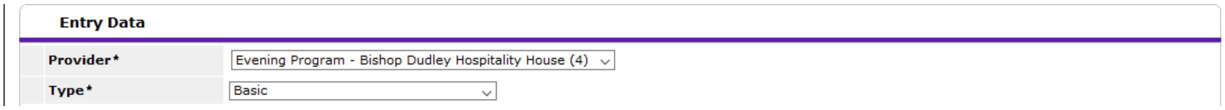


Figure 1-9

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 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

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)**

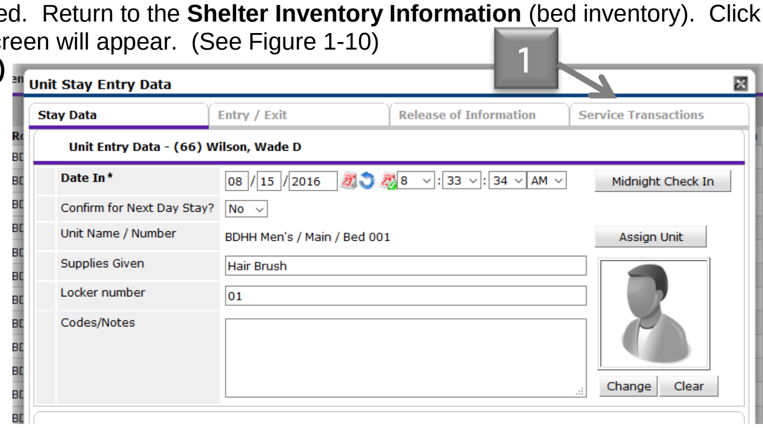


Figure 1-10

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)

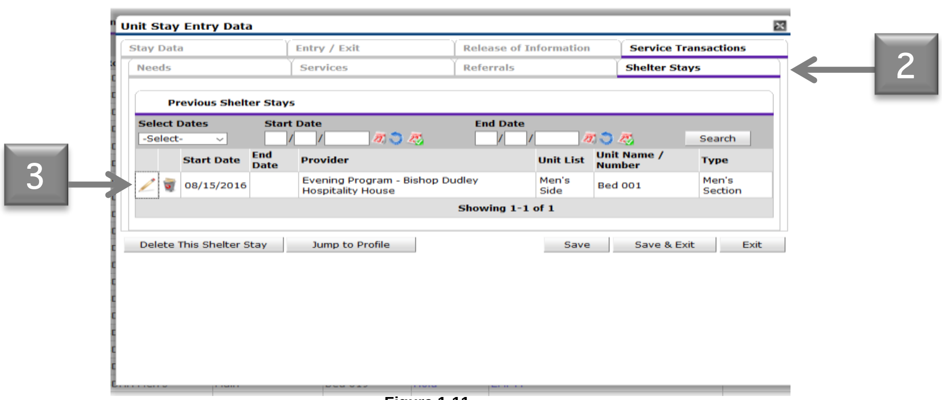
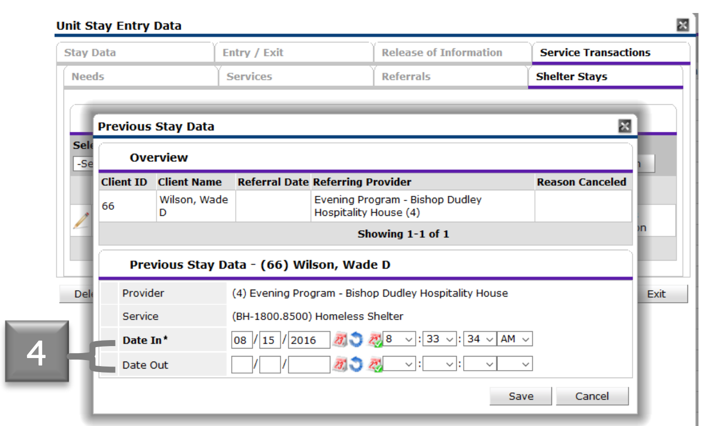


Figure 1-11

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).

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 clients shelter stay. (See Figure 1-13)

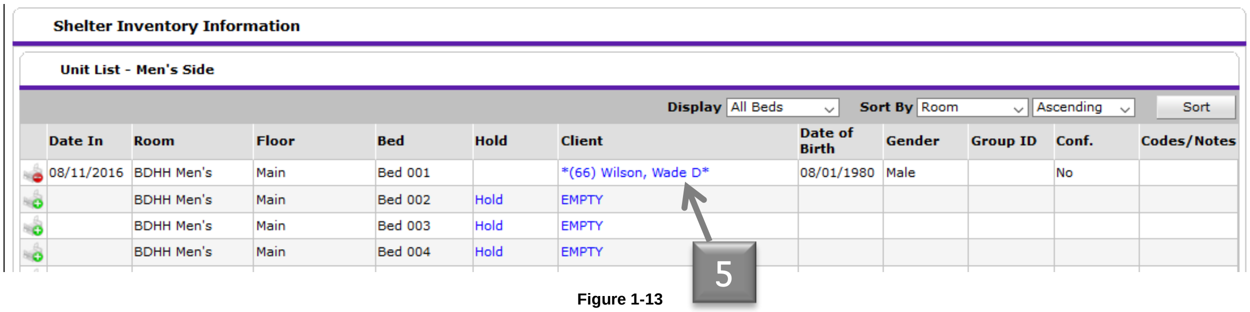


Figure 1-13

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)

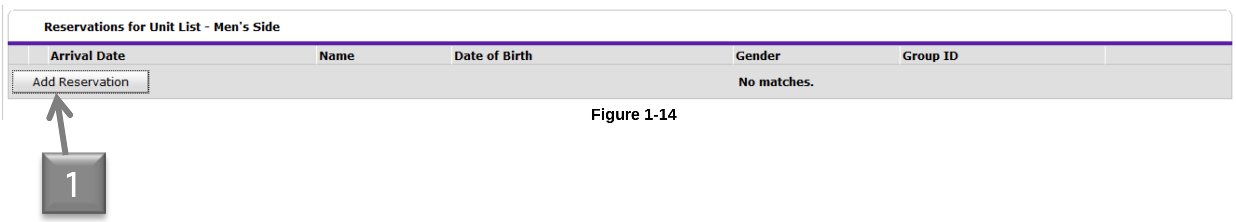


Figure 1-14

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**.

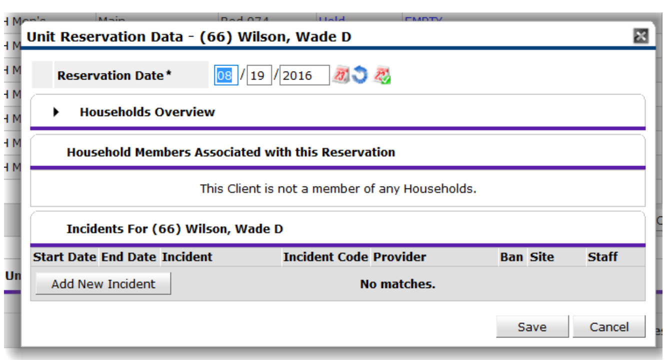
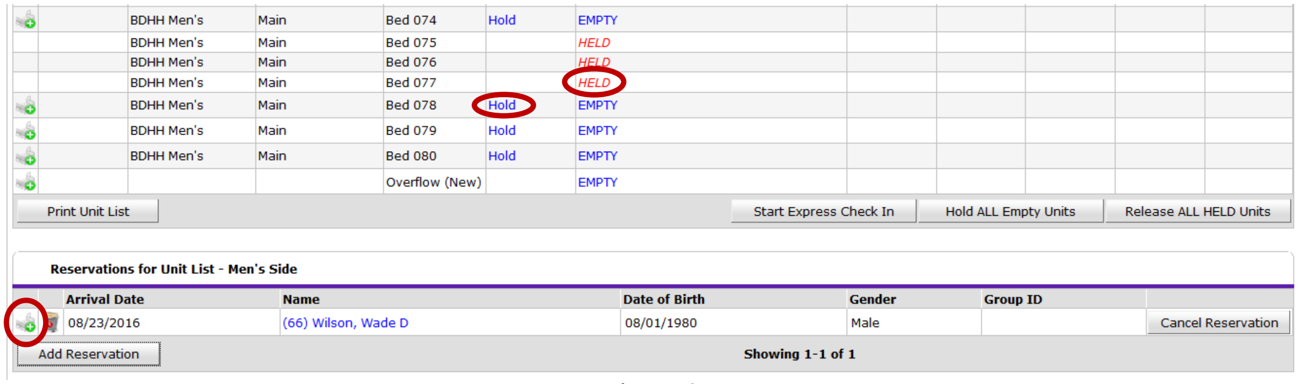


Figure 1-15

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 <u>NEW</u> reservation- click **Add Reservation**. (See Figure 1-16)
6. Follow **Client Check In process** on page 3.



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
BDHH Men's	Main	Bed 078	Hold	EMPTY
BDHH Men's	Main	Bed 079	Hold	EMPTY
BDHH Men's	Main	Bed 080	Hold	EMPTY
		Overflow (New)		EMPTY

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

Reservations for Unit List - Men's Side

Arrival Date	Name	Date of Birth	Gender	Group ID	
08/23/2016	(66) Wilson, Wade D	08/01/1980	Male		Cancel Reservation

Add Reservation | **Showing 1-1 of 1**

Figure 1-16