

ShelterPoint Guide

AREAS OF FOCUS

- [ShelterPoint Overview](#)
- [Accessing ShelterPoint](#)
- [The ShelterPoint Dashboard](#)
- [Assigning Households to Beds \(singles vs. families\)](#)
- [Express Check-In](#)
- [Check Households Out of Beds \(one-by-one\)](#)
- [Check Multiple Households Out of Beds](#)
- [Unit Lists](#)
- [Shelter Stays](#)

SHELTERPOINT OVERVIEW

ShelterPoint is a module of ServicePoint that is used to track clients that occupy beds in a particular program. ShelterPoint uses Unit Lists, also referred to as Bed Lists, to track client bed assignments. In Chicago, ShelterPoint is being used to document how many beds a program has in their program, as well as how many beds are currently occupied and unoccupied. A primary function of ShelterPoint is assigning clients to beds. When clients are assigned to beds, a Shelter Stay record is attached to the client's record. Shelter Stays are recorded as Service Transactions.

Despite the name ShelterPoint, Chicago will use this module of ServicePoint for all programs that house clients. Assigning clients to beds will be a necessary component of Coordinated Entry. Bed assignments will determine how many beds are unoccupied, allowing the system to accurately reflect programs able to receive referrals to fill those beds.

ACCESSING SHELTERPOINT

ShelterPoint is a menu option from the ServicePoint Menu, located on the left side of the screen. **Click on ShelterPoint** to review the available Dashboard options.

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

Once a **Provider** and **Unit List** are selected, click **Submit**.

View Shelter Inventory		
Provider *	All Chicago - Emergency Shelter (883) ▼	Check Unit Availability
Unit List *	Emergency Shelter ▼	Submit 

(* required)

Provider: Select a **PROGRAM** name from the available options in the drop-down list, select the program that data will be reviewed or created under.

Unit List: Select the Unit List that data will be reviewed or created under. If there is only one Unit List set-up for the Provider selected, the Unit List will populate automatically.

THE SHELTERPOINT DASHBOARD

Check Client In – assign Households, including single clients and families, to beds – one at a time
Express Check In – *randomly* assign Households with single clients only to beds – NOT for families
View All – a list of all beds available under the selected Unit List – all dashboard options are available as well

View Shelter Inventory

Provider *	All Chicago - Emergency Shelter (883) ▾	Check Unit Availability
Unit List *	Emergency Shelter ▾	Submit
Type	Emergency Shelter	

ShelterPoint Dashboard


Check Client In


Express Check In


Check In Reservation


Check In Referral


Hold ALL Empty Beds

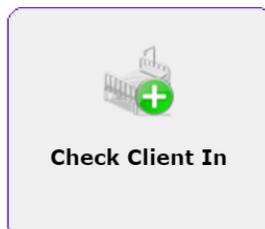

Print ID Cards


Update Confirmation List


Transmit Today's Check Out List


View All

ASSIGNING HOUSEHOLDS TO BEDS (SINGLES VS. FAMILIES)



This option takes the user to a list of ALL BEDS attached to the selected Unit List, including those that are assigned to a client and those that are empty. **Clients are added to beds one at a time using this option and specific HMIS beds can be selected**, representing the bed assigned to the client by the program.

Households including Families – start from an individual bed assignment for the **Head of Household (HoH)**. There will be an option to assign each family member to a bed while assigning the HoH a unit from the unit list.

After selecting **Check Client In**, users will see the **Shelter Inventory Information**. All beds in the selected Unit List will be visible. There may be separations by Floor or Room.

Shelter Inventory Information													
Unit List - Emergency Shelter													
Display All Beds ▾ Sort By Floor ▾ Ascending ▾ Sort													
	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes	On Premises	Exempt from Curfew
	01/12/2016	Fifth Floor	Suite 504	Bed 001		(292021) KungFu, Panda	03/11/2011	Male		No		No	No
	01/12/2016	Fifth Floor	Suite 504	Bed 002		(358860) Epstein, Theo	03/01/1991	Male		No		No	No
	01/25/2016	Fifth Floor	Suite 504	Bed 003		(3) test, test				Yes		Yes	No
		Fifth Floor	Suite 504	Bed 004	Hold	EMPTY							
		Fifth Floor	Suite 504	Bed 005	Hold	EMPTY							
		Fifth Floor	Suite 504	Bed 006	Hold	EMPTY							
		Fifth Floor	Suite 504	Bed 007	Hold	EMPTY							
		Fifth Floor	Suite 504	Bed 008	Hold	EMPTY							
		Fifth Floor	Suite 504	Bed 009	Hold	EMPTY							

In order to add a single client (or a family) to a bed, **click on the green circle with the plus sign, or the word EMPTY.**

ShelterPoint > Client Search

The Client Search window will appear next.

Users will search for clients by **Name, Social Security Number (SSN) or Client ID** number.

If Name or SSN are used, select the client's record from the search results.

(see screenshot on the next page)

ShelterPoint > Client Search Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name	First: <input type="text" value="test"/>	Middle: <input type="text"/>	Last: <input type="text" value="test"/>	Suffix: <input type="text"/>
Name Data Quality	-Select-			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

Buttons: Search, Clear, **Add New Client With This Information**, Add Anonymous Client

Client Number

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

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias
 3	test, test	***-**-1111		

Search for the client.
If searching by **Name or SSN**, select the correct record by clicking on the **green circle with the plus sign**.

It's possible that an **Alert** or **Unread Client Note Notification** window will pop up when you select a client record. Clicking **Continue** on the Alert window or **Exit** on the Unread Client Note Notification will allow the client to be attached to a bed.

Alerts - (390509) test, bowman

Initial Check In

 This is the Client's first stay

Would you like to continue with Client Check-In?

Unread Client Note Notification

Client Notes - (390509) test, bowman

Click Exit to close this window.

Provider	Note Date	Note Preview	Full Note
All Chicago	06/10/2016	test note abcd	

Buttons: Add New Client Note, Print, Showing 1-1 of 1,

In the next screen, confirm the Date and review any Household members. Then click **Save & Exit** to complete the bed assignment.

ShelterPoint > Check In Type here for Global Search

Unit Entry Data - (390509) test, bowman

Date In* 09 / 12 / 2016 9 : 18 : 22 PM Midnight Check In

On Premises Yes

Exempt from Curfew No

Unit Name / Number Fifth Floor / Suite 504 / Bed 004

Supplies Given

Locker number

Codes/Notes

Date In - date the client is assigned to the bed.
Unit Name / Number - indicates the bed the client was assigned

Assign Unit

Change Clear

Incidents For (390509) test, bowman

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.						

Add New Incident

Households Overview

Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(178462) Single Male

(390509) test, bowman Assign Unit

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider

Save Save & Exit Exit

Household members (if any) will be listed here. Click **Save & Exit** to finish assigning this single client to a bed.

The user will then be returned to the Unit List. The client is now assigned to a bed.

Display All Beds Sort By Floor

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.
01/12/2016	Fifth Floor	Suite 504	Bed 001		(292021) KungFu, Panda	03/11/2011	Male		No
01/12/2016	Fifth Floor	Suite 504	Bed 002		(358860) Epstein, Theo	03/01/1991	Male		No
01/25/2016	Fifth Floor	Suite 504	Bed 003		(3) test, test				Yes
09/12/2016	Fifth Floor	Suite 504	Bed 004		(390509) test, bowman	06/08/1987	Male		Yes
	Fifth Floor	Suite 504	Bed 005	Hold	EMPTY				
	Fifth Floor	Suite 504	Bed 006	Hold	EMPTY				
	Fifth Floor	Suite 504	Bed 007	Hold	EMPTY				
	Fifth Floor	Suite 504	Bed 008	Hold	EMPTY				
	Fifth Floor	Suite 504	Bed 009	Hold	EMPTY				
	Fifth Floor	Suite 504	Bed 010	Hold	EMPTY				

ASSIGNING HOH'S FAMILY MEMBERS TO BEDS

Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(21) Male w/ child

(44) Test, Bowman

(45) Test, George

1. Check off the box next to the additional Household member(s) name(s).

2. Select **Assign Unit**

In the next window, select a bed from the dropdown menu for the Household member.

Unit List

Daytime List

Bed: -Select-

- 1 / 1 / Bed 002
- 1 / 1 / Bed 003
- 1 / 1 / Bed 004
- 1 / 1 / Bed 005
- 1 / 1 / Bed 006
- 1 / 1 / Bed 007
- 1 / 1 / Bed 008
- 1 / 1 / Bed 009
- 1 / 1 / Bed 010
- 1 / 1 / Bed 011
- 1 / 1 / Bed 012
- 1 / 1 / Bed 013
- 1 / 1 / Bed 014
- 1 / 1 / Bed 015
- 1 / 1 / Bed 016
- 1 / 1 / Bed 017
- 1 / 1 / Bed 018
- 1 / 1 / Bed 019
- 1 / 1 / Bed 020

NOTE: Once the bed is selected, the bed number will appear. **Complete this step for each Household member staying in a bed.**

(21) Male w/ child

(44) Test, Bowman

(45) Test, George

Suite 504 ↓ Bed 005

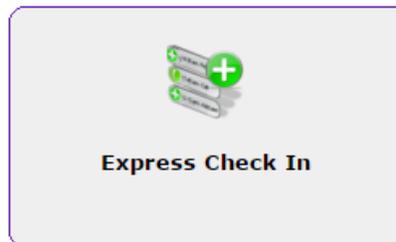
Click to complete the bed assignment for this Household.

Unit List - Emergency Shelter

		Display		All Beds		Sort By		Floor		Ascending			
	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes	On	Pro
	09/13/2016	Fifth Floor	Suite 504	Bed 003		(43) Test, [blurred]	09/13/2016	Female		Yes			Yes
	09/13/2016	Fifth Floor	Suite 504	Bed 002		(44) Test, [blurred]	09/13/2016	Female		Yes			Yes
	09/13/2016	Fifth Floor	Suite 504	Bed 001		(45) Test, [blurred]	09/13/2016	Female		Yes			Yes
	09/13/2016	Fifth Floor	Suite 504	Bed 004		(44) Test, Bowman			41	Yes			Yes
	09/13/2016	Fifth Floor	Suite 504	Bed 005		(45) Test, George			41	Yes			Yes

All of the household members should now be assigned to beds.

EXPRESS CHECK-IN



This options can be used for households representing **SINGLE CLIENTS ONLY**. Individual clients will be assigned **RANDOMLY** to the next available bed in the Unit List. Express Check In is a fast option to assign multiple clients to beds. User will search for clients by name, SSN or the Client ID can be used.

NOTE: it may be helpful to generate a list of client ID numbers to be assigned to beds, before using Express Check In.

Before starting your client search, ensure that your 'Date In' is set to the correct date. It will populate to "right now".

ShelterPoint > Express Check In

Unit Entry Data

Date In* 09 / 13 / 2016 9 : 27 : 18 AM Midnight Check In

Unit Name / Number (First Unit Available)

Supplies Given

Codes/Notes

Client Search

Please Search the System before adding a New Client.

Name First Middle Last Suffix

Name Data Quality -Select-

Alias

Social Security Number - - -

Social Security Number Data Quality -Select-

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 to add that Client to the Check In List.

Client ID # Submit

Find your clients by:

1. Entering the HMIS ID #
2. Searching by NAME or SSN
3. Scan client ID card

When using Client ID Number, click Submit to add the client to a bed.

Client Number

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

Client ID # 37 Submit

SCANNING ID CARDS

The cursor must be in the Client ID# field.

Clients are automatically assigned the next available beds.

Client Results

	ID	Name	Social Security Number	Date of Birth	Alias
+	42	test, test			
+	43	test2, test2			

Showing 1-2 of 2

Express Check In List

Incidents for Last Added,

Start Date	End Date	Incident
Add New Incident		

Express Check In List

Name	Floor	Room	Bed

If searching by **Name or SSN**, select the correct client from the results

The Client will appear in the **Express Check In List** once they have been assigned to a bed.

Alerts or Unread Client Note Notification windows could pop up when you select a client record. Clicking **Continue** or **Exit** will allow the client to be attached to a bed.

Once the client appears under the **Express Check In List** a Bed number will appear.

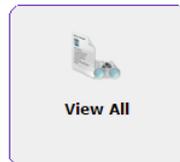
Express Check In List				
	Name	Floor	Room	Bed
+	(42) test, test	Fifth Floor	Suite 504	Bed 006

Move on to the next client that will be assigned to a bed. Users can add as many single clients to beds as needed, from this step.

NOTE: As each new client is assigned to a bed, the last client's name will disappear from the list. As long as a **Bed Number** appears, the client has been successfully assigned to a bed.

CHECK HOUSEHOLDS OUT OF BEDS (ONE-BY-ONE)

Households are checked out of beds from the Unit List window. If you are not already in this window, select VIEW ALL from the ShelterPoint Dashboard.



Unit List - Emergency Shelter

Display: All Beds | Sort By: Floor

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Code
09/13/2016	Fifth Floor	Suite 504	Bed 004		(44) Test, Bowman			41	Yes	
09/13/2016	Fifth Floor	Suite 504	Bed 005		(45) Test, George			41	Yes	
	Fifth Floor	Suite 504	Bed 009	Hold	EMPTY					

Find the client or HoH that will be removed from a bed. If there are **family members**, they will also be removed from beds in the next step.

From the Check Out window, ensure that the Date Out is correct.

ShelterPoint > Check Out
Type here for Global Search

Unit Exit Data - (44) Test, Bowman

Date Out*	09 / 13 / 2016 10 : 30 : 39 AM
On Premises	Yes
Exempt from Curfew	No
Unit Name / Number	Bed 004
Supplies Returned	<input checked="" type="radio"/> Yes <input type="radio"/> No

Apply Funds for Service

Funding Sources

Source
<input style="margin-right: 10px;" type="button" value="Add Funding Source"/> <input style="float: right;" type="button" value="Calc"/>

Household Members

i To update Household members' Check Out data, click on the box beside each Household Member who were previously checked out are disabled and appear purposes only.

- (21) Male w/ child**
 - (44) Test, Bowman (Date In: 09/13/2016 8:46:22 AM) (Primary Client)
 - (45) Test, George (Date In: 09/13/2016 8:46:22 AM)

To exit family members at the same time as the HoH, **check off the box** next to all clients in the family who are checking out of a bed.

To complete the Check Out, select **Save & Exit**.

Save

Save & Exit

Exit

The user will now be returned to the Unit List view.

The beds that the clients were just check out of will now be EMPTY.

Unit List - Emergency Shelter											
Display All Beds Sort By Floor											
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Code	
	Fifth Floor	Suite 504	Bed 004	Hold	EMPTY						
	Fifth Floor	Suite 504	Bed 005	Hold	EMPTY						
	Fifth Floor	Suite 504	Bed 009	Hold	EMPTY						

CHECK MULTIPLE HOUSEHOLDS OUT OF BEDS

Two Step Process: begin from the ShelterPoint Dashboard OR scroll to the bottom of the View All (Unit List) window.

step 1



Update Confirmation List

step 2



Transmit Today's Check Out List

Step #1 - Select **Update Confirmation List** to indicate the clients that will be removed from beds. Confirm who will be staying in a bed for another night.

Step #2 – Select **Transmit Today's Check Out List** to remove the identified clients from beds *in one step*.

Update Confirmation List

Transmit Today's Check Out List

Update Confirmation List

Confirmation

Client List

Client ID	Name	Group ID	Bed	Confirm	On Premises	Exempt from Curfew
9	Bing, Chandler		Bed 007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Bradshaw, Carrie		Bed 002	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
35	Dog, Cat		Bed 003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Fox, Amanda		Bed 001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
42	test, test		Bed 006	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
37	WEST,			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Uncheck boxes under the **CONFIRM** column for all clients being checked out of beds
Use Clear to uncheck all boxes at once!!

Clear Check All
Confirm Cancel

If the box is checked in the **CONFIRM** column, that client will not be checked out of a bed in Step #2.

If any clients are remaining in beds for another night, keep their box checked under **CONFIRM**.

Bed	Confirm	On Premises	Exempt from Curfew
Bed 007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed 002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed 003	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed 001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed 006	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bed 008	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clear Check All
Confirm Cancel

Click **Confirm** to move on to Step #2.

Bed 008

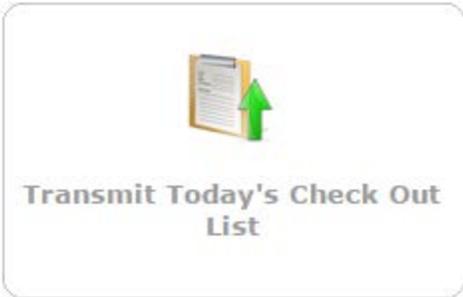
Confirmation Statistics

Successfully confirmed 0 client(s) and unconfirmed 6 client(s).

OK

Now move on to **Step #2**.

Step #2: Transmit Today's Check Out List



or

Check boxes under **CHECK OUT** for all clients leaving beds.

Check Out List

Current Check Out Date: 09 / 13 / 2016 11 : 18 : 59 AM

Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned	On Premises	Exempt from Curfew
<input type="checkbox"/>	9	Bing, Chandler		Bed 007	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No
<input type="checkbox"/>	6	Bradshaw, Carrie		Bed 002	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No
<input type="checkbox"/>	35	Dog, Cat		Bed 003	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No
<input type="checkbox"/>	3	Fox, Amanda		Bed 001	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No
<input type="checkbox"/>	42	test, test		Bed 006	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No
<input type="checkbox"/>	37	WEST, JUNE		Bed 008	09 / 13 / 2016 11 : 18 : 59 AM	<input type="checkbox"/>	No	No

Future Check Out List

Future Check Out Date: 09 / 13 / 2016 11 : 18 : 59 AM

Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned
<input type="checkbox"/>						<input type="checkbox"/>

Dates of check out can be adjusted for all clients at the top of the window, or individually from the window listing each client's **Date Out**.

Select Check Out to complete Step #2.

Returning to the View All screen will confirm that all beds are now **EMPTY**.

Shelter Inventory Information

Unit List - Emergency Shelter									
Display <input type="text" value="All Beds"/>									
	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Gr
		Fifth Floor	Suite 504	Bed 001	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 002	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 003	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 004	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 005	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 006	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 007	Hold	EMPTY			
		Fifth Floor	Suite 504	Bed 008	Hold	EMPTY			

UNIT LISTS

Unit Lists are maintained for each program by the HMIS Team, as requested by the Agency’s Technical Administrator (ATA). There should be an equal number of beds available in ShelterPoint, as are available in the program. There can be multiple Unit Lists created to represent different groups of clients, as requested by the program.

Floor, Room and **Bed** numbers can be randomly assigned by the HMIS Team, or the program can elect to create a list that represents their own numbering system. For scattered site projects, different **Rooms** can be set-up to represent family units.

Unit Lists can be adjusted, by reaching out to the HMIS Team. A link is available on the HMIS Helpdesk to request a new Unit List be created, to update an existing Unit List, or to delete an existing Unit List. [Click Here to access the form now.](#)

SHELTER STAYS

Shelter Stays are created under each client’s ClientPoint record when they are added to a bed in ShelterPoint. There is a Start and End date associated with the Shelter Stay record, as well as a Need. Start Dates represent the date the client was checked into the bed and the End Date is when the client was checked out. These records are used to run reports on how many clients occupied beds in a program, on a particular night. All users are able to run reports on Shelter Stays.

As questions arise, reach out to the HMIS Helpdesk by emailing HMIS@allchicago.org