ES Night by Night Workflow

Emergency Shelters using the Night-By-Night workflow must record an Initial Enrollment, every Bed Night when the client slept in the program, and an Exit for the season/period.

ClientPoint Entry: Creating a Project Entry for Initial Enrollment

Follow these steps the first night a client stays at the shelter if there is not already a shelter project open. This creates the project entry that will stay open until either:

- The shelter project is ending (if seasonal) OR
- The client obtains housing OR
- The client does not utilize the shelter for over 90 days

A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. *Client Search*
   1. Click on **ClientPoint**
   2. Enter Head of Household's Name &/or partial SSN
   3. Click **Search**
      a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of the client's name
      b. If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

C. *Client Profile*

   1. *Back Date Prompt*: change the date to match the intake date and click **Set New Back Date**
   2. Click on the pencil next to **Client Demographics.** Fill in the appropriate information and click **Save**.
   3. Add or update additional information
   4. "Client Profile: all projects" – *only complete contact information or client notes if available*

D. *Households*

   <u>If the client is presenting as a single client, skip this section.</u>

   1. Click on **Households** tab

2. If no household appears, click **Start New Household**
    a. Select appropriate **Household Type**
    b. Search for additional household member(s)
        - Enter another household member's Name.
        - Click **Search**
            - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of that client's name.
            - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, sex and click **Add New Client with This Information.**
    c. Repeat the search until all household members are listed in the "Selected Clients" section
    d. Click **Continue**
    e. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.
    f. Click **Save & Exit**
3. If a household is showing on this tab, verify/update household details by clicking **Manage Household**
    a. Verify **Household Type**
    b. Remove household member(s) by clicking the red circle next to their name.
    c. Add household member(s) by clicking **Add/Delete Household Members**
        - Click the arrow to expand **Add Clients to the Household** section
        - Search for additional household member(s)
            - Enter another household member's Name.
        - Click **Search**
            - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of that client's name.
            - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information.**
        - Repeat until all household members are listed in the "Select Clients" section
        - Click **Continue**
    d. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.
    e. Click **Save & Exit** once complete

E. Release of Information (ROI)

<u>STOP HERE & CONTACT THE DATA CENTER if the client marked "NO" to any section of the ROI</u>

1. Click on **ROI** tab
2. Click **Add Release of Information**
    a. Select all members of household
    b. Fill in **Release Granted**
    c. Fill in **End Date** with date one year from date signed
    d. Select **Documentation** type
    e. Fill in **Witness** full name with the name of the staff that conducted the privacy conversation
    f. Click **Save Release of Information**

F. Entry/Exit

1. Click **Entry/Exit** tab
2. Click **Add Entry/Exit**
3. Confirm Project Start Data
    a. If there is more than one client entering, check the box next to each additional household member that is entering the project. *Anyone not checked will be excluded from the project.*
    b. Confirm the **Provider** listed is correct.

        - *The default provider appearing will be whatever was selected under Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and research for the head of household.*

        - Select **HUD** as the Type

    c. Confirm the **Project Start Date**
    d. Click **Save & Continue**
4. Complete the assessment
5. Click **Save**
6. Scroll to the top of the assessment then click on the name of the next additional household member from the "Household Members" menu on the left.
7. Repeat steps 4-6 until all household members' data has been entered.
8. Click **Save & Exit**

G. *Record Shelter Stay following process below*

Recording a Bed Night

Every night a clients sleeps in a project must be recorded separately in HMIS. Each ES Nnb project must determine which method they will use before the project can launch.

Option 1: If Project Uses Service Transaction record for nightly Shelter Stay

A. Home Dashboard

1. Log into HMIS@NCCEH
2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. Client Search

1. Click on **Client**
1. *Enter Head of Household's* **Client ID**
2. *Back Date Prompt*: change the date to match the intake date and click **Set New Back Date**

B. *Record the Service Transaction*

1. Click on the **Service Transaction** tab
2. Click on **Add a Service**
3. Check all applicable Household members that stayed the night
4. Confirm the start date matches the Back Date Mode
5. Enter the **End Date** as the morning after the client entered the shelter (End date must be plus 1 to record a Bed Night)
6. Select Emergency Shelter as the transaction code
   a) The service code should be located in the drop down list. If it is not, contact the Data Center for updates.
7. Save & Continue
8. Scroll to the *Need* at the bottom
9. Mark the *Need* as **Complete**
10. Mark the *Outcome* as **Fully Met**
11. **Save & Exit**

Option 2:If Project uses ShelterPoint Bed Management for a nightly Shelter Stay

Follow these steps <u>every night</u> of shelter operation to check in/out clients who stayed at the shelter. Before checking someone in to the shelter for the first time, a project entry should be created.

A. *Home Dashboard*

12. Log into HMIS@NCCEH
13. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. *Click on ShelterPoint*

1. Because you are EDA as your project, the "Provider" should already be selected
2. Click on **Unit List** for the bed chart needed to access
3. Click **Submit**
4. Click **view all**
5. Click on the **green plus** to the left of "Date In" by a bed you want to check the client into

C. *Search for the client*

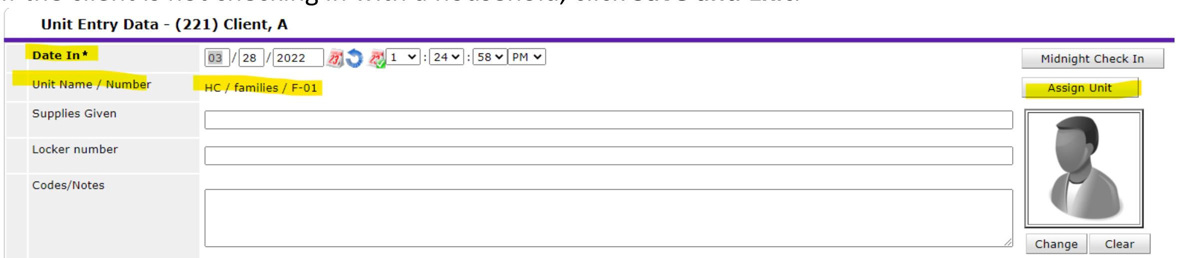
1. Enter Head of Household's Name and/or partial SS# or search by HMIS ID #
2. Click **Search**
   i. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of the client's name

Client Results

	ID	Name	Social Security Number	Date of Birth
	194	[redacted]	***-**-7526	1981
	225	[redacted]	***-**-2795	1960

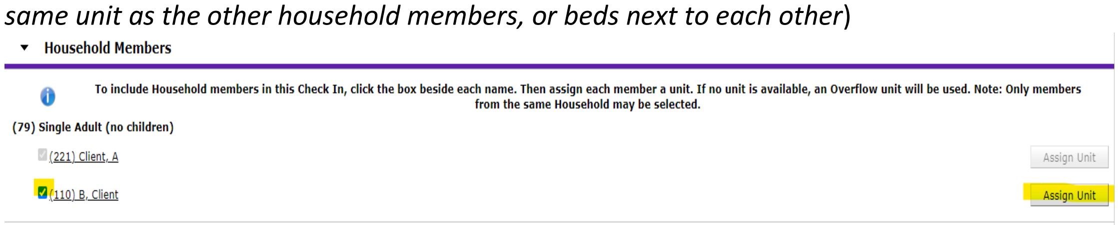
D. Unit Entry Data Section

1. *Date In:* the date the client is checking into the shelter
2. *Unit name/number:* the room and bed assigned to the client. If you need to change the room/bed- click on **Assign Unit** and select from the drop down a different bed/unit and click **select**
3. If the client is not checking in with a household, click **Save and Exit**.



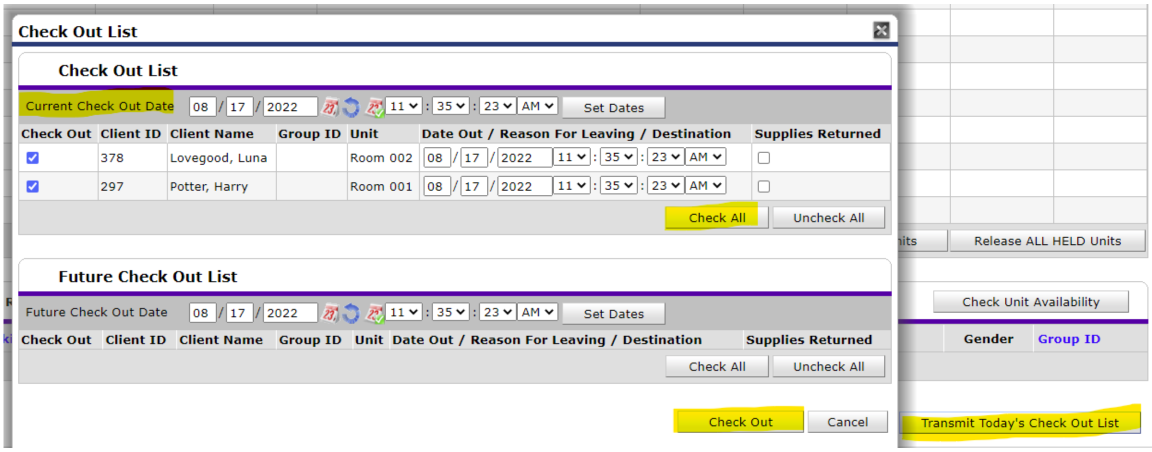
E. Households Members Section (if applicable)

1. Click the black down arrow to expand the **Household Members** section. If other household members are also checking in to the shelter, you will see the household members listed.
2. Click the **checkbox** to the left of the household members who are also checking in
3. Click **Assign Unit** to select which bed/unit to assign the member to (*so can be in the same unit as the other household members, or beds next to each other*)



F. Checking Clients Out the Next Morning

a. Click on ShelterPoint
b. Click on the **Unit List** for the bed chart and click **Submit** and **View All**
c. Click **Transmit Today's Check Out List,** found at the bottom of the screen
d. Ensure the **Current Check Out Date** is the date after the check in date
e. Click **Check All** to ensure all clients are getting checked out
f. Click **Check Out**



Record a missed Bed Night

If a client is signed in but does not actually stay the night, they should not have a "bed night" record. Instead, record the unmet Need with the following steps:

A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data
B. *Client Search*
   1. Click on **Client**
   2. Enter Head of Household's **Client ID**
   3. *Back Date Prompt*: change the date to match the intake date and click **Set New Back Date**
C. *Record the outstanding Need*
   1. Click on the **Service Transaction** tab
   2. Click on **Add a Need**
   3. Check all applicable Household members who intended to stay the night
   4. Confirm the **Date of Need** matches the Back Date Mode
   5. Select Emergency Shelter as the transaction code
      i. The service code should be located in the drop-down list. If it is not, contact the Data Center for updates.
   6. Select **Need Status** as *Canceled*
   7. Select **Outcome of Need** as Not Met
   8. Select **If Need not met, Reason** as appropriate. Common reasons include:
      i. Client Could Not Be Contacted
      ii. Client did not return/complete application
      iii. Ineligible
      iv. Service was not accessible
   9. Save & Continue

Interim Update: Recording Current Living Situations and a Date of Engagement

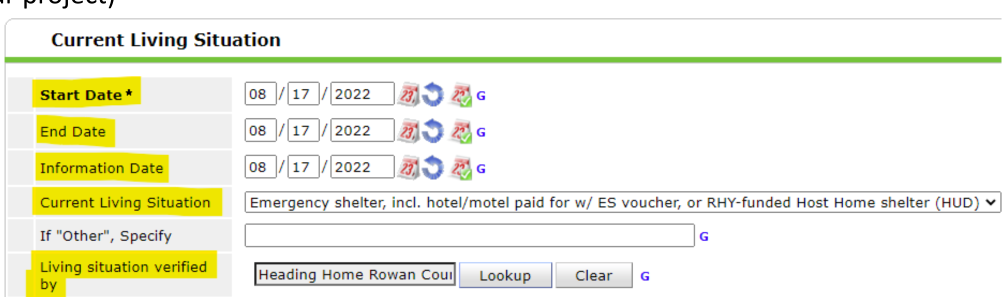
In HMIS, Night by Night shelters are expected to record every date an interaction occurs between a worker and a client via the Current Living Situation (CLS). CLS interactions are those designed to engage the client and may include activities such as a conversation about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.

In addition to recording each CLS, Night by Night shelters are expected to record a Date of Engagement when an interactive client relationship results in a deliberate client assessment or beginning of a case plan. If the client exits without becoming engaged, the Date of Engagement should be left blank.

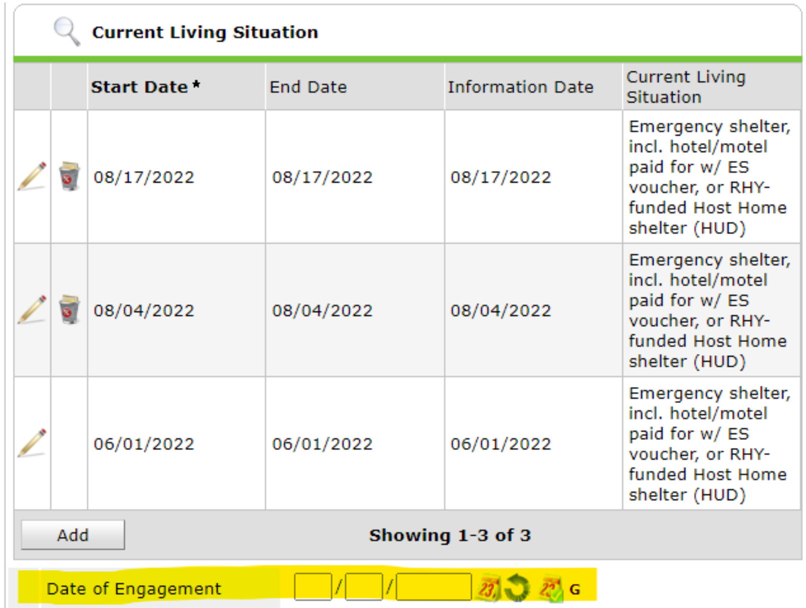
A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. *Client Search*
   1. Click on **ClientPoin**t from the lefthand menu on your HMIS homepage
   2. Search for the client (by name or by HMIS number) in ClientPoint
   3. Set **Back Date Mode** for the date of the contact and/or date of engagement

C. *Interim Review*
   1. Click the **Entry/Exit** tab
   2. Click the notebook icon located under "Interims" by the associated project entry, and click **Add Interim Review**
   3. Select the **Interim Review Type** as **Update**
   4. Confirm the **Review Date**
   5. Click Save and Continue
   6. Scroll down to the Current Living Situation assessment and click Add
   7. Fill in the Start, End, and Information Date, which should all be the same date, the Current Living Situation, which should be Emergency Shelter since that's where the client is staying during your contact, and Living Situation Verified By (use "Lookup" and find your project)



   8. If adding a **Date of Engagement**, enter the date in the field below the Current Living Situation section



Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
08/17/2022	08/17/2022	08/17/2022	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)
08/04/2022	08/04/2022	08/04/2022	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)
06/01/2022	06/01/2022	06/01/2022	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)

Add Showing 1-3 of 3

Date of Engagement / / G

ClientPoint Exit

A client should be exited from the project if any of the following conditions are met.

- The shelter project is ending (if seasonal) OR
- The client obtains housing OR
- The client does not utilize the shelter for over 90 days

A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the green plus next to the project for which you are entering data

B. *Client Search*
   1. Click on **ClientPoint**
   2. Search for the client that is exiting the project (name search or HMIS ID search)
   3. Set **Back Date Mode** for the date that the client is exiting the project. Click **Set New Back Date**

C. *Entry/Exit*

   1. Click **Entry/Exit** tab
   2. Click the pencil next to the Exit Date column within your project's row
   3. Complete Exit Data
      a. If there is more than one client exiting, check the box next to each additional household member that is exiting the project.
      b. Confirm the **Exit Date**
      c. Select **Reason for Leaving**
      d. Select **Destination.**
      e. Click **Save & Continue**

4. Complete exit assessment information.

Click **Save & Exit** once all assessments for all household members have been completed