ShelterPoint Workflow

ShelterPoint Entry

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

Entering a Client

A. 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

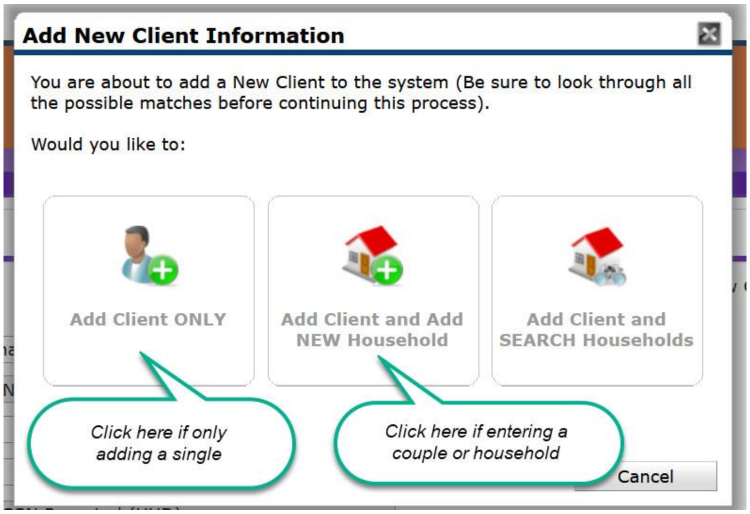
B. Search for the client

1. Enter Head of Household's Name and/or partial SS#
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

    ii. If no matches are found, try at least two other ways to search for the client (Partial Names or Alias or SSN)
    iii. If still no matches are found, verify all information listed is correct with proper capitalizations, add the additional information including the full social security number, date of birth, and veteran status, and click **Add New Client with This Information**
    iv. Click **Add Client ONLY** (if entering a single) or **Add Client and Add NEW Household (**if entering a new client with a household)

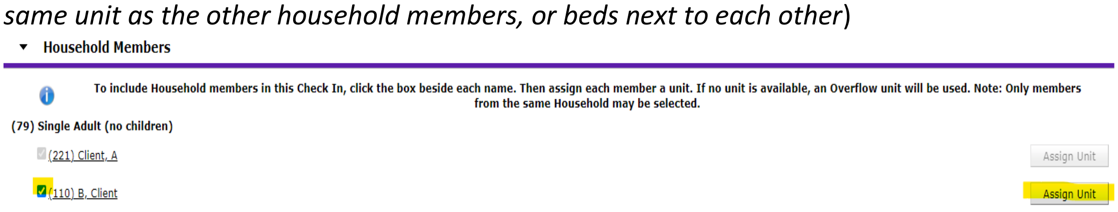


C. **Unit Entry Data Section**

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**

D. **Households Overview and Households Members Section**

1. Click the black down arrow to expand the **Households Overview** section. *In the Households Overview, you will see if the household member just checked-in is part of a household. From this section, you can create and/or manage the household. For more information on how to create a new household, or edit an existing household, see the TipSheet here. ([ShelterPoint: Creating a New Household] or [Managing Existing Households])*
2. 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.
3. Click the **checkbox** to the left of the household members who are also checking in
4. 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*)

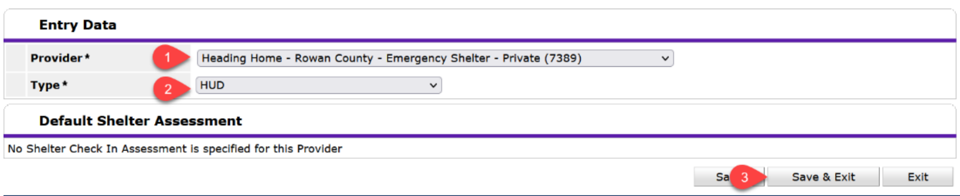


E. **Release of Information**

1. Click on **View ROI Details**
2. If an ROI is needed, click on **Add Release of Information**. *If a client marked "No" to any section of the ROI, contact the NCCEH Data Center for assistance locking the profile down as necessary.*
    i. Select all members of the household at the top if necessary
    ii. Fill in **Release Granted**
    iii. Fill in **End Date** with date one year from date signed
    iv. Select **Documentation** type
    v. Fill in **witness** name
    vi. Click **Save Release of Information**
    vii. Close the "Release of Information" pop up box

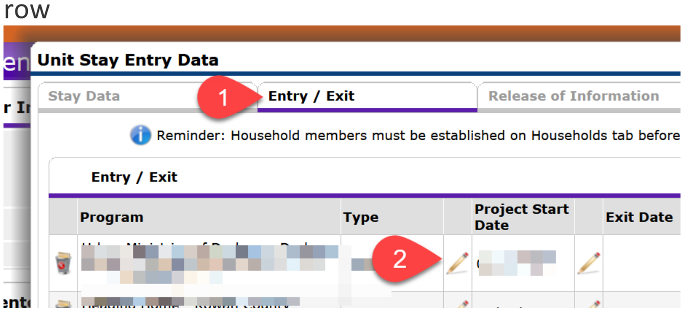
F. **Entry Data**

1. Confirm **Provider**
2. Confirm **Type**
    a) "HUD"= funding through ESG and local or private funding sources
    b) "VA"= funding through the VA such as GPD or HVCV
3. Click **Save & Exit** to return to unit list



G. **Entry/Exit Tab (Project Start Assessment)**

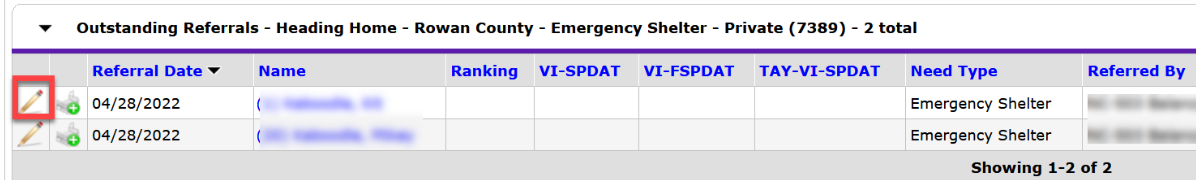
1. From the unit list, click on the household member's name click on Head of Household's Name
2. Click on the **Entry/Exit** tab
3. Click on the pencil icon to the left of the **Project Start Date** column within your project's row



4. Complete the entry assessment. *For tips and more details on how to properly complete the assessment, please view the following Tip Sheets/Guides. (link to ZenGuide)*
5. Click **Save**
6. Scroll to the top and select **additional household member**'s name from the menu on the left to complete their entry assessment
7. Repeat steps f-h for all household members
8. Once the assessment is completed for the last household member, click **Save & Exit**

H. Optional: Response to Shelter Stay Referral

Some shelters are receiving direct referrals within HMIS to the program. These referrals appear below the bedlist of clients within the "Outstanding Referrals" table.



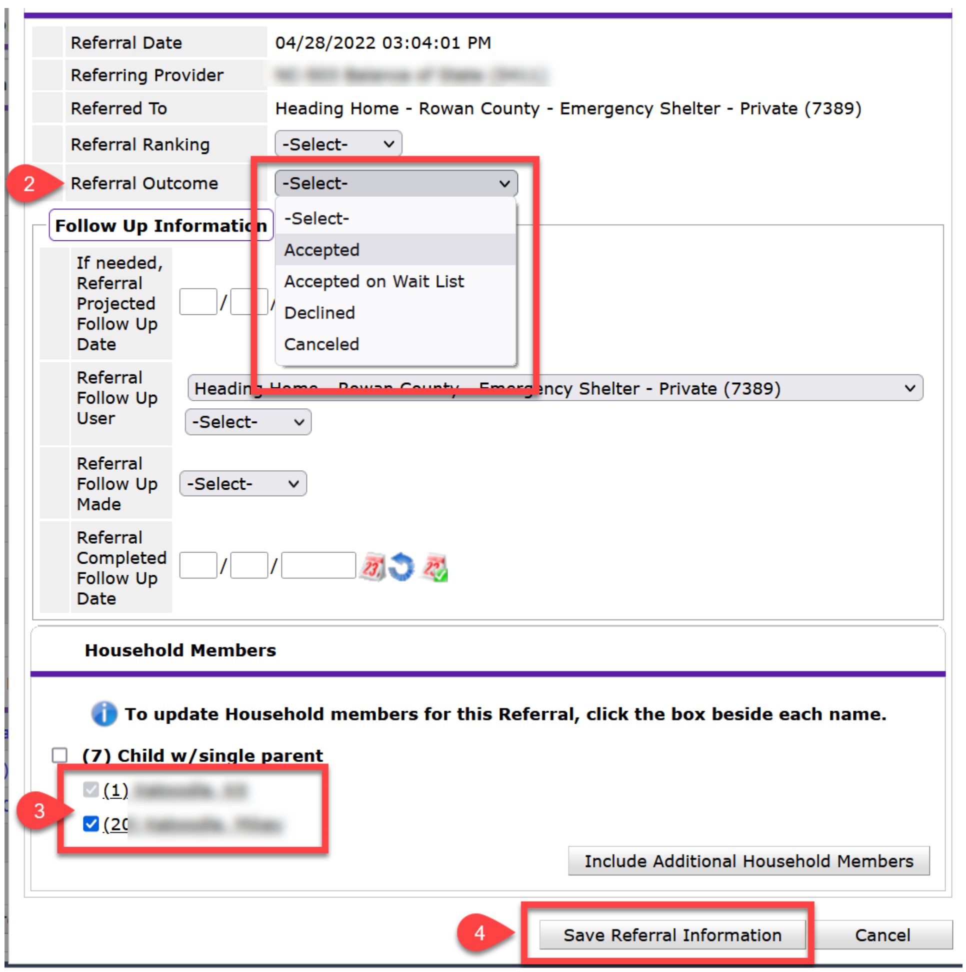
Outstanding Referrals - Heading Home - Rowan County - Emergency Shelter - Private (7389) - 2 total

	Referral Date	Name	Ranking	VI-SPDAT	VI-FSPDAT	TAY-VI-SPDAT	Need Type	Referred By
	04/28/2022	[illegible]					Emergency Shelter	[illegible]
	04/28/2022	[illegible]					Emergency Shelter	[illegible]

Showing 1-2 of 2

To update the referral:

1. Click the **pencil** at the front of the row with the Head of Household's name
2. From the "referral data" pop up window, select the appropriate **Referral Outcome**
3. Confirm all of the household members are checked
4. Click **Save Referral Information**



Interim/Update

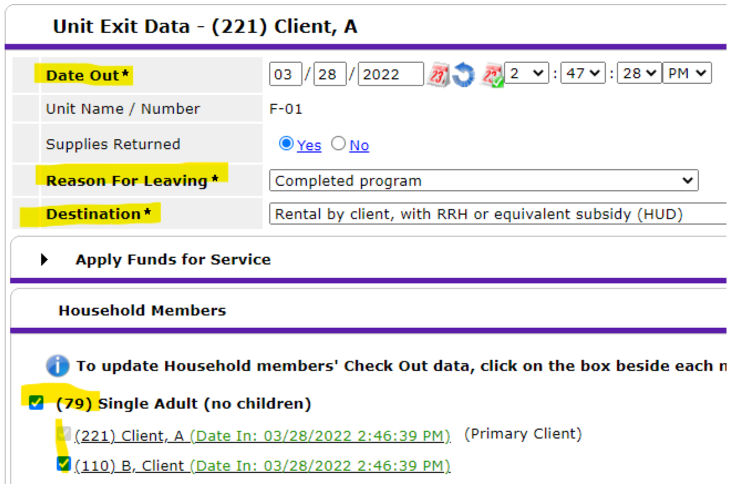
1. Click on **ClientPoin**t from the lefthand menu on your HMIS homepage
2. Search for the client (by name or by HMIS number) in ClientPoint
3. Click the **Entry/Exit** tab

4. Click the notebook icon located under "Interims" by the associated project entry, and click **Add Interim Review**
5. Select the **Interim Review Type**
   a) "Update": completed anytime information has changed since project entry
   b) "Annual Assessment": required assessment for all clients remaining in a project after one year; Annual Assessments must be completed within 30 days before or after the Head of Household's project start anniversary date (example: if the HoH entered the project on 3/17/2022, the Annual Assessment would need to be completed between 2/15/2022 and 4/16/2023)
6. Confirm the **Review Date**
7. Click **Save and Continue** to update the assessment. *For tips and more details about how to update HUD sub-assessments (for income, disabling condition, non-cash benefits, and health insurance), please view the following Tip Sheet/Guide: Updating HUD Verification Sub-Assessments*

Exiting Client and Removing from ShelterPoint Bed List

1. Click on **ShelterPoint**
2. Click on the **Unit List** for the bed chart needed to access and click **submit** and then **view all**
3. If a client has any information changing at the exit interview, update the Exit Assessment by clicking on the client's name from the bed list
   i. Click the **Entry/Exit** tab
   ii. Click the pencil icon located next to "Exit Date" for the project.
   iii. Enter the **Exit Date**
      - *Be sure to check all family members that are exiting, if applicable*
   iv. Select the **reason for leaving** and the appropriate **exit destination**. *For more guidance of selecting the most appropriate exit destination view this Tip Sheet (link to Zen Guide)*
4. Click **Save and Continue** to update the assessment. *For tips and more details about how to update HUD sub-assessments (for income, disabling condition, non-cash benefits, and health insurance), please view the following Tip Sheet/Guide: Updating HUD Verification Sub-Assessments*
5. From the bed list, click on the **Red Minus Symbol** to the left of the "Date In" by the client name
6. Enter the **Date Out** as the date the client is exiting from the shelter
7. Confirm the **reason for leaving** and the appropriate **exit destination**.

8. *For households only*: Under the "Household Members" section, check the boxes next to each household member who need to be removed from beds



9. Click **Save & Exit.** *The clients will automatically be removed from the Unit List and be exited from your project.*

**Any changes to the client record from this point forward must be made through ClientPoint's Entry/Exit tab.*