



## USER BULLETIN: Maneuvering Through ShelterPoint

24-Oct-13

The following document will assist you in entering clients into ShelterPoint, Removing Clients from ShelterPoint, and how to handle specific situations with the use of ShelterPoint tools.

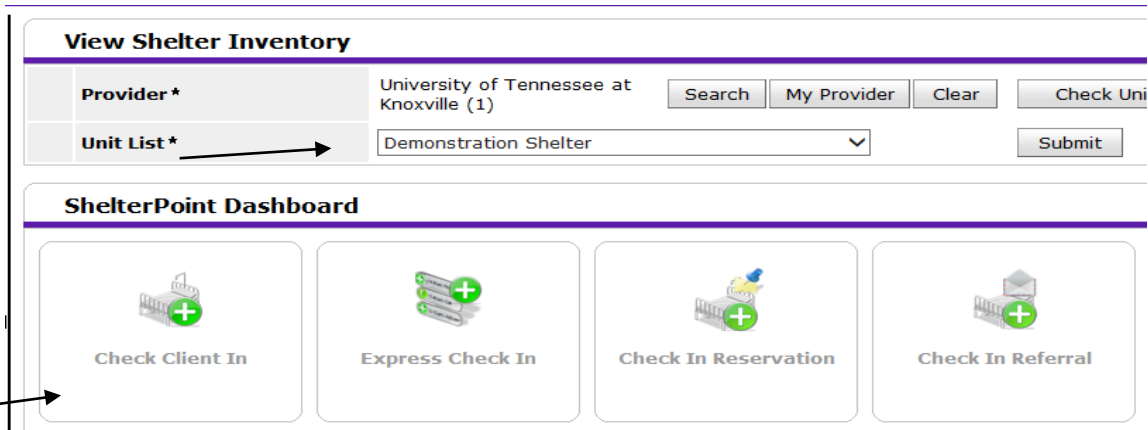
### Entering Clients into ShelterPoint

To enter clients into ShelterPoint:

1. Click on ShelterPoint from your menu.



2. Make sure you have the correct shelter selected for your provider.
3. Click on "Client Check In" on the ShelterPoint Dashboard.



- Click on "Empty" link on the bed you wish to fill.

**Shelter Inventory Information**

Unit List - Demonstration Shelter

Display: All Beds | Sort By: Floor | Ascending | Sort

| Floor           | Room | Bed | Hold | Client | Date of Birth | Gender | Group ID | Conf. | Codes/Notes |
|-----------------|------|-----|------|--------|---------------|--------|----------|-------|-------------|
| Blue: Level One | A    | 001 | Hold | EMPTY  |               |        |          |       |             |
| Blue: Level One | A    | 002 | Hold | EMPTY  |               |        |          |       |             |
| Blue: Level One | A    | 003 | Hold | EMPTY  |               |        |          |       |             |
| Blue: Level One | A    | 004 | Hold | EMPTY  |               |        |          |       |             |

- Search for Client or enter Client ID. \*Note: If the client is not in the system and does not have a client profile (KARM) or entry/exit (All other programs), please reference the Order of Entry User Bulletin before continuing <https://knoxhmis.sworps.tennessee.edu/wp-content/uploads/2013/09/OrderofEntry.pdf>

**Client Search**

Please Search the System before adding a New Client.

First: Ima | Middle: | Last: Test | Suffix: |

Alias: |

Social Security Number: | - | - |

Social Security Number Data Quality: -Select-

Exact Match:

Search | Clear | Add New Client With This Information | Add Anonymous Client

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**Client Number**

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

Client ID #: | Submit

- Click on plus sign for client (under search results) for Client you wish to enter.

**Client Results**

| ID    | Name        | Social Security Number | Date of Birth | Alias | Gender | Banned     | Household Count |
|-------|-------------|------------------------|---------------|-------|--------|------------|-----------------|
| 26468 | Test, Ima D | ***-**-7098            |               |       |        | Indefinite | 1               |

Showing 1-1 of 1

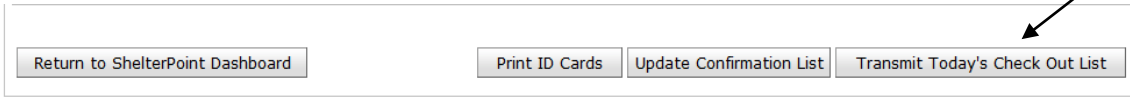
- Scroll down and click "Save and Exit".

Save | Save & Exit | Exit

- Repeat steps 4 through 7 until all clients are checked in.

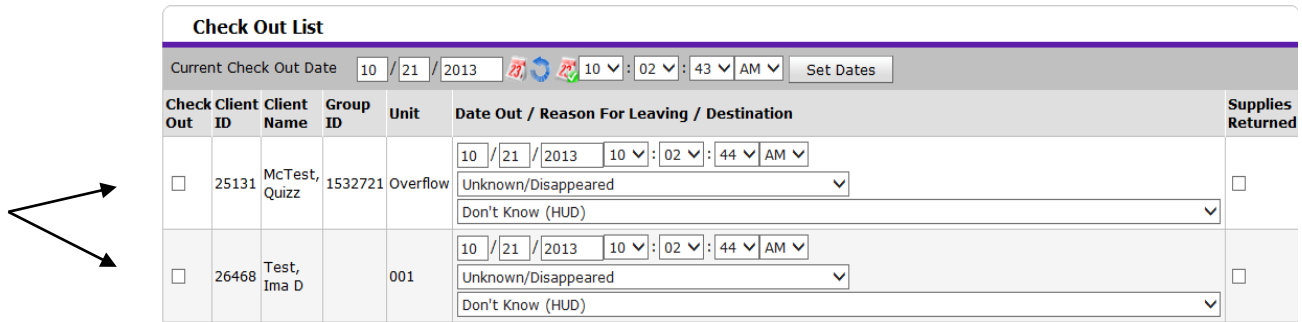
## Checking Clients out of ShelterPoint

1. Repeat steps 1-3 listed above.
2. Scroll to the bottom of the page and click "Transmit Today's Checkout List".



Return to ShelterPoint Dashboard      Print ID Cards      Update Confirmation List      Transmit Today's Check Out List

3. If checking out **individual client(s)**, click on "Check Out" box.



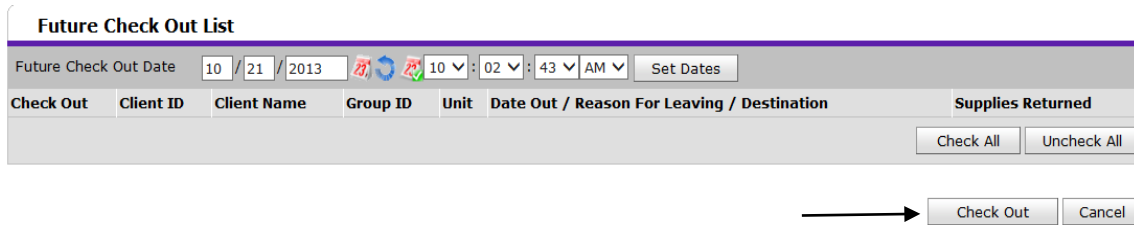
| Check Out                | Client ID | Client Name   | Group ID | Unit     | Date Out / Reason For Leaving / Destination                               | Supplies Returned        |
|--------------------------|-----------|---------------|----------|----------|---|--------------------------|
| <input type="checkbox"/> | 25131     | McTest, Quizz | 1532721  | Overflow | 10 / 21 / 2013 10 : 02 : 44 AM<br>Unknown/Disappeared<br>Don't Know (HUD) | <input type="checkbox"/> |
| <input type="checkbox"/> | 26468     | Test, Ima D   |          | 001      | 10 / 21 / 2013 10 : 02 : 44 AM<br>Unknown/Disappeared<br>Don't Know (HUD) | <input type="checkbox"/> |

If checking out **all clients**, click on "Check All" button.



Check All      Uncheck All

4. Click "Check Out" Button.



| Check Out | Client ID | Client Name | Group ID | Unit | Date Out / Reason For Leaving / Destination | Supplies Returned |
|-----------|-----------|-------------|----------|------|---|-------------------|
|-----------|-----------|-------------|----------|------|---|-------------------|

Check All      Uncheck All

Check Out      Cancel

**NOTE: If your ShelterPoint is set up to enter reason for leaving and destination, Please select prior to clicking "Check Out" button.**

## ShelterPoint Questions

1. What do I do if I have assigned a bed to a client and client needs to have the assignment changed?

1.1. Click on Client's name on the Bed List

| Unit List - Demonstration Shelter |      |     |      |                     |               |           |          |       |             |  |
|-----------------------------------|------|-----|------|---------------------|---------------|-----------|----------|-------|-------------|--|
| Display                           |      |     |      | Sort By             |               | Ascending |          | Sort  |             |  |
| Floor                             | Room | Bed | Hold | Client              | Date of Birth | Gender    | Group ID | Conf. | Codes/Notes |  |
| Blue: Level One                   | A    | 001 |      | (26468) Test, Ima D |               |           |          | No    |             |  |

1.2. Click on "Assign Unit" button.

| Unit Entry Data - (26468) Test, Ima D |                           |   |   |    |   |    |    |                   |  |  |
|---------------------------------------|---------------------------|---|---|----|---|----|----|-------------------|--|--|
| Date In *                             | 10 / 21 / 2013            | 8 | : | 44 | : | 35 | AM | Midnight Check In |  |  |
| Confirm for Next Day Stay?            | No                        |   |   |    |   |    |    |                   |  |  |
| Unit Name / Number                    | Blue: Level One / A / 001 |   |   |    |   |    |    | Assign Unit       |  |  |

1.3. Reassign Unit

| Assign Unit           |                           |
|-----------------------|---------------------------|
| Demonstration Shelter | -Select-                  |
| Bed                   | Blue: Level One / A / 002 |
|                       | Blue: Level One / A / 003 |
|                       | Blue: Level One / A / 004 |
|                       | Blue: Level One / A / 005 |
|                       | Blue: Level One / A / 006 |
|                       | Blue: Level One / A / 007 |
|                       | Blue: Level One / A / 008 |
|                       | Blue: Level One / A / 009 |
|                       | Blue: Level One / A / 010 |
|                       | Blue: Level One / A / 011 |
|                       | Blue: Level One / A / 012 |
|                       | Blue: Level One / A / 013 |
|                       | Blue: Level One / A / 014 |
|                       | Blue: Level One / B / 001 |
|                       | Blue: Level One / B / 002 |
|                       | Blue: Level One / B / 003 |
|                       | Blue: Level One / B / 004 |
|                       | Blue: Level One / B / 005 |
|                       | Blue: Level One / B / 006 |
|                       | Blue: Level One / B / 007 |
|                       | Blue: Level One / B / 008 |
| Cancel                |                           |
| Check In              |                           |

2. What do I do if a client checks in after Midnight?

2.1. Click on "Midnight Check-in" button.

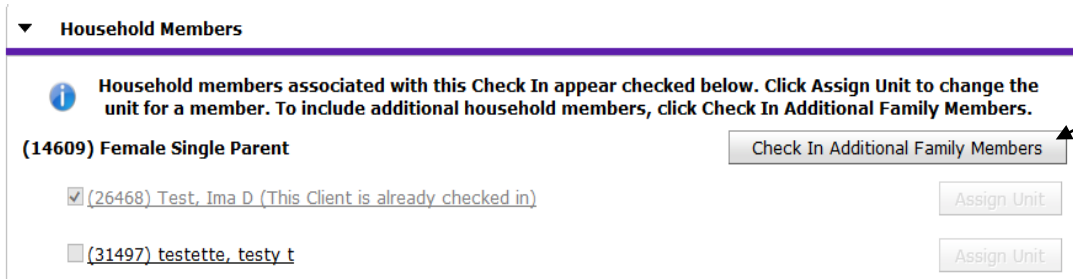
| Unit Stay Entry Data                  |                |   |              |    |                        |    |                      |                   |  |  |
|---------------------------------------|----------------|---|--------------|----|------------------------|----|----------------------|-------------------|--|--|
| Stay Data                             |                |   | Entry / Exit |    | Release of Information |    | Service Transactions |                   |  |  |
| Unit Entry Data - (26468) Test, Ima D |                |   |              |    |                        |    |                      |                   |  |  |
| Date In *                             | 10 / 21 / 2013 | 8 | :            | 44 | :                      | 35 | AM                   | Midnight Check In |  |  |
| Confirm for Next Day Stay?            |                |   |              |    |                        |    |                      |                   |  |  |

(This will change the time to prior to midnight so the night's stay will be recorded for the same night.)

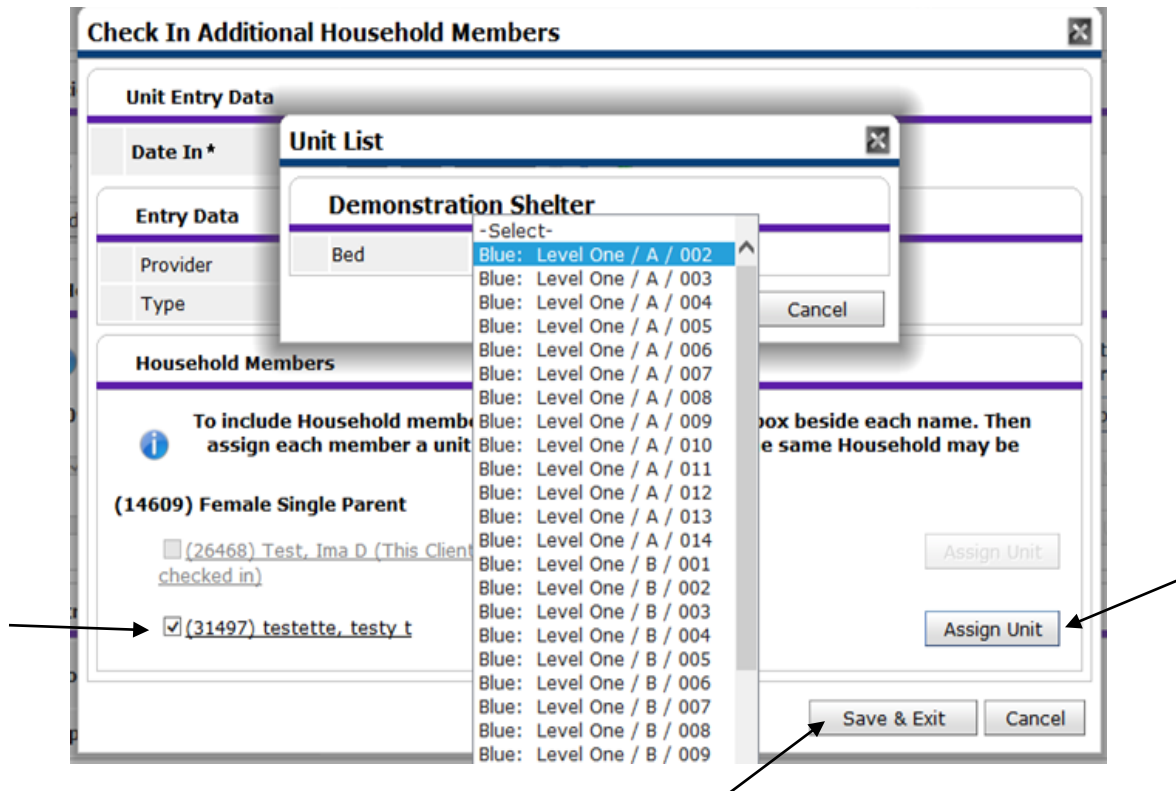
3. How do I house family members together?

3.1. Click on Client's name on the Bed List as in 1.1

3.2. Click on "Check in Additional Household Members" button.



3.3. Select household members to add and click on "Assign Unit" button, assign unit to selected household member, click on "Save and Exit" button.



Congratulations, you have finished entering and exiting clients from ShelterPoint.

Please contact [hmissupport@utk.edu](mailto:hmissupport@utk.edu) if you have any questions