



USER BULLETIN: Maneuvering Through ShelterPoint

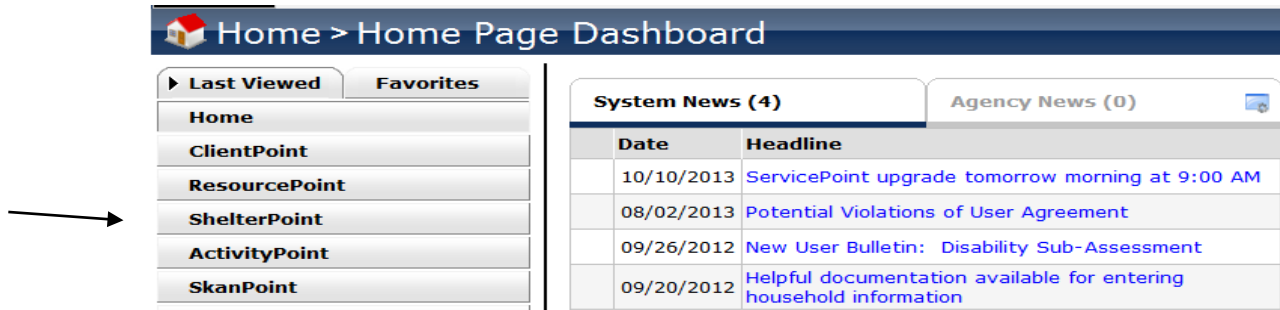
24-Oct-13

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.

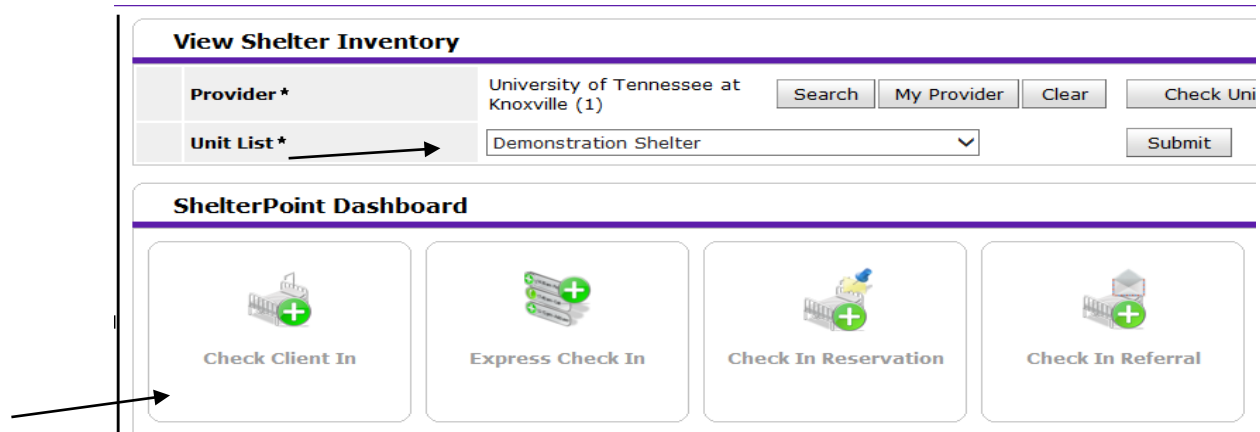
Entering Clients into ShelterPoint

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.

Name	First	Middle	Last	Suffix
Ima			Test	
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
Exact Match	<input type="checkbox"/>			

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 # 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

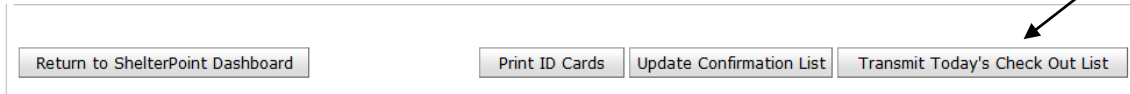
- Scroll down and click "Save and Exit".

Save Save & Exit Exit

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

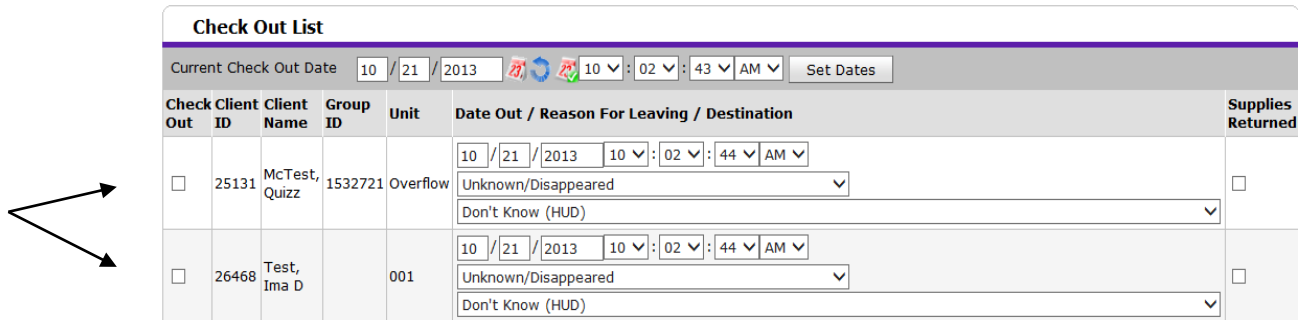
Checking Clients out of ShelterPoint

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.



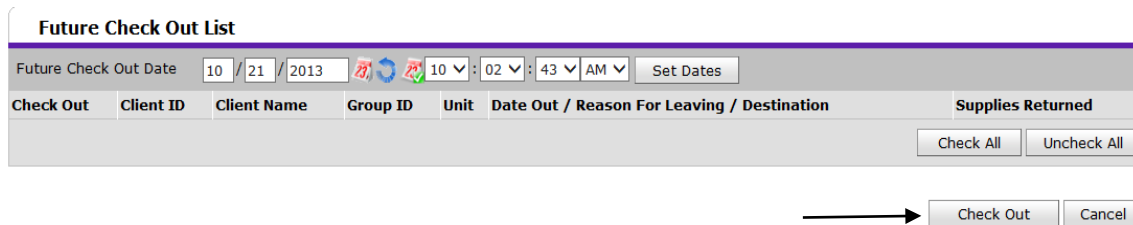
Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned
<input type="checkbox"/>	25131	McTest, Quizz	1532721	Overflow	10 / 21 / 2013 10 : 02 : 44 AM Unknown/Disappeared Don't Know (HUD)	<input type="checkbox"/>
<input type="checkbox"/>	26468	Test, Ima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

▼ Household Members

Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.

(14609) Female Single Parent

(26468) Test, Ima D (This Client is already checked in)

(31497) testette, testy t

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.

Check In Additional Household Members

Unit Entry Data

Date In *

Entry Data

Provider

Type

Household Members

To include Household members, assign each member a unit

(14609) Female Single Parent

(26468) Test, Ima D (This Client is already checked in)

(31497) testette, testy t

Unit List

Demonstration Shelter

Bed

-Select-

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

Blue: Level One / B / 009

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

Please contact hmissupport@utk.edu if you have any questions