ShelterPoint Module
Check-In/Check-Out Workflow

Note: The Homeless Resource Councill of the Sierras' HMIS Lead Agency **highly recommends** entering a client into ClientPoint before proceeding with the following steps.

Note: If your default provider log-in is not the program where data is to be entered, then:

- Click the "Enter Data As" function (upper right hand corner) to switch to the correct program.

Note: Back Date Mode is unavailable when you first logon; however, once you get to the shelter check in part in step 1 below, you will be able to go into Back Date mode.

Check a Client In

1. Click "ShelterPoint" tab in the left hand column.
    a. Ensure the "Provider" and "Unit List" are correct.
    b. Under the ShelterPoint Dashboard, Select "Check Client In" (The "Unit List" will be displayed showing all available and unavailable beds.)
        i. Click icon next to the bed that you want to add the client to.
            1. Enter First Name and Last Name, Click "Search"
                a. Click icon.
            or
            2. Enter Client ID # if known.
                a. Click "Submit"

Note: When you click the icon through the search or "Submit" when entering the Client's ID #, the Unit Entry Data Screen will load.

Unit Entry Data

2. Complete the "Unit Entry Data" section.
    a. **Date In:** Enter the date the client entered the shelter. (Midnight Check In will allow you to count a night even when the client did not enter the shelter until after midnight.)
    b. **Unit Name/Number:** Should Auto-Fill from your selection on the previous screen.
    c. **Supplies Given:** List any supplies given to the clients.
    d. **Locker Number:** List any locker numbers given to the clients.
    e. **Codes/Notes:** Please fill in any Notes that will be beneficial for the clients
3. Complete the "Incidents" section. (Optional)
    a. **Incidents for (Client Number) Last, First:** This section is for incidentals and bans on the client. If a client has been banned or an incident has happened then click on the "Add New Incident" button.
        i. Complete the Sub-Assessment.
            1. Click "Save"

Note: Please do not delete incidents for Data Quality. You can enter an end date for the period that the incident/ban is valid for.

4. Household Overview Section
    a. If the client is currently in a household then the information will be listed in this section. If single, then the text "This Client is not currently a member of any Households" will be displayed.
        i. You can Search Existing Households or Start a New Household if needed. This relates to the information entered in ClientPoint.

5. Household Members Section
    a. If Household Members are checking in with the client,
        i. Check the box next to their names.
        ii. Click “Assign Unit”
            1. Select the bed you want to assign to them.
                a. Click “Select”
                    i. Repeat for all additional household members.
6. Click “Save and Exit”

Note: Once you press the Save & Exit button then the screen will refresh to the Unit List

Check-Out Client

1. From the Unit List, Click  icon.

Note: Clicking the  icon will open up the “Unit Exit Data” screen.

Unit Exit Data

2. Complete the “Unit Exit Data” section.
    a. **Date Out:** The Date that client is leaving the program.
    b. **Unit Name/Number:** The bed name that the client is being exited from.
    c. **Supplies Returned:** If supplies were given to client at check in, check whether they were returned or not.
    d. Complete the “Funding Sources” section.
        i. Click “Add Source” if applicable.
            1. Funding Source screen will pop-up.
                a. Select “Funding Source”
                b. Enter dollar amount.
                    i. Click “Save” or “Save and Add Another”
    e. Complete the “Household Members” section.
        i. Check the box of all Household Members to associate with this check out.
            1. If none are associated then you will get the message “The associated household is no longer active.”
3. Complete the “Incidents” section. (Optional)
    a. **Incidents for (Client Number) Last, First:** This section is for incidentals and bans on the client. If a client has been banned or an incident has happened then click on the “Add New Incident” button.
        i. Complete the Sub-Assessment.
            1. Click “Save”
4. Click “Save and Exit”

Note: Once you hit the Save and Exit button then the screen will refresh and the client will no longer be listed in the Unit List.