

CHIN HMIS Training Manual

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Logging In

1. Log onto <https://chin.servicept.com>
2. Enter user name and one-time password.



3. Upon entering your one-time password, you'll be asked to create a new one.
4. The first time you enter your new password you will see the License Agreement. Review it and click **Accept**.
5. You are now at the ServicePoint home page.

Password Tips

Your password must:

1. Have at least 8 characters.
2. Have at least 2 numbers.
3. Have at least 1 capital letter.
4. Not be your name, your agency's name, or a common work spelled forward or backwards.

Password Expiration

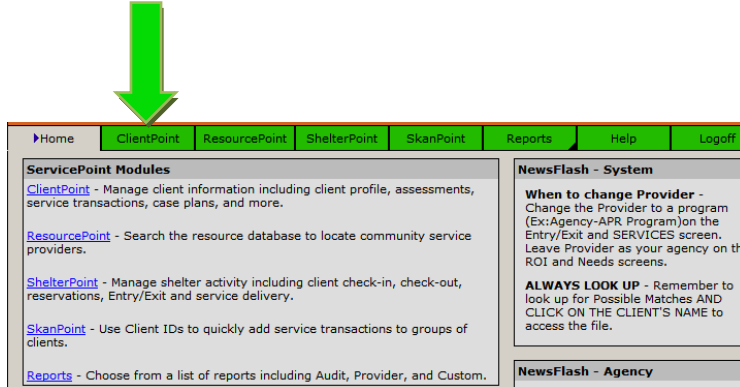
1. This screen means that your password has expired.
2. Create a new one and enter it in *both* fields.

ServicePoint will automatically ask you to change your password every 45 days. You cannot switch between 2 passwords, but you can cycle through 3. ServicePoint will lock you out of the system if you try more than 3 incorrect combinations. If you're locked out of the system, contact CHIN to have your password reset.

ClientPoint: Searching for/Adding a client

Here you will begin using the HMIS to collect client level data. If a client's file is already in ServicePoint, you can find it by either entering his/her client ID and clicking **Search This ID**, or by entering his/her name and clicking **Search For Client**. To get here, click on the ClientPoint tab.

1. Select **ClientPoint** to begin entering clients into the HMIS.



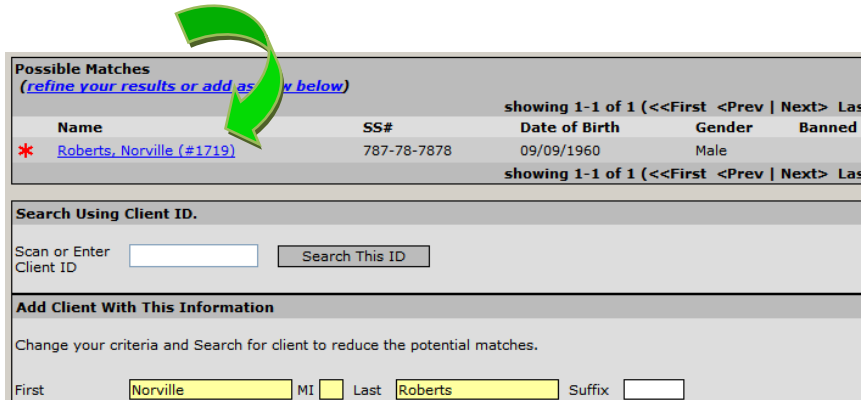
2. Type in the client's name, being careful to spell the names correctly.
3. Click **Search for Client**.

The screenshot shows the 'Search for Existing Client' form in the ServicePoint system. The form has a navigation bar at the top with tabs for Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Help, and Logoff. The main content area is titled 'Search for Existing Client' and contains the following fields and buttons:

- Search Using Client ID:** A text input field labeled 'Scan or Enter Client ID' and a button labeled 'Search This ID'.
- Search for Existing Client:** A section with the instruction 'Search for client before adding a new client.' containing:
 - First name: 'Norville' (highlighted in yellow), MI: a dropdown menu, Last name: 'Roberts' (highlighted in yellow), Suffix: a text input field.
 - SS#: Three text input fields separated by dashes.
 - Search Filter: A checkbox labeled 'Exact Match?'.
 - A button labeled 'Search For Client'.



- Be sure to look at the top of the screen for Possible Matches; if your client is already in the system, click on their name from the list. Clicking on the client's name will take you directly to the client's profile screen.



Possible Matches
(refine your results or add as new below)

showing 1-1 of 1 (<<First <Prev | Next> Last)

Name	SS#	Date of Birth	Gender	Banned
* Roberts, Norville (#1719)	787-78-7878	09/09/1960	Male	

showing 1-1 of 1 (<<First <Prev | Next> Last)

Search Using Client ID.

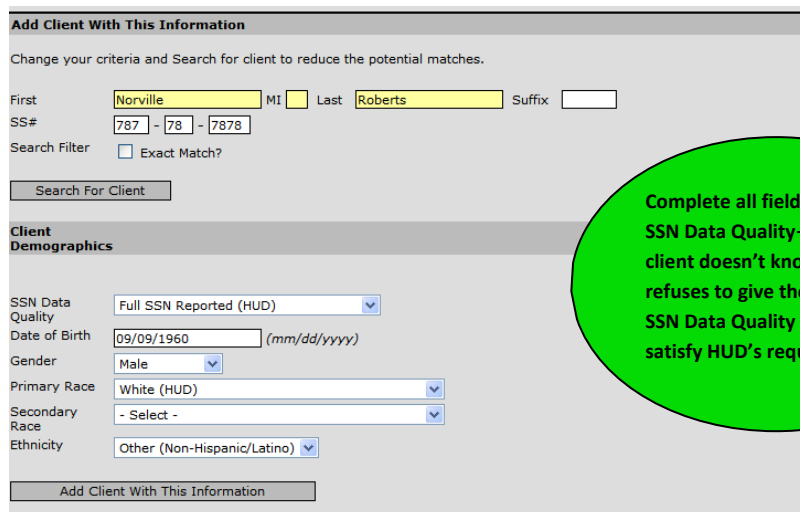
Scan or Enter Client ID

Add Client With This Information

Change your criteria and Search for client to reduce the potential matches.

First MI Last Suffix

- If the client is *not* in the system, continue entering his/her demographic information, and click **Add Client With This Information**.



Add Client With This Information

Change your criteria and Search for client to reduce the potential matches.

First MI Last Suffix

SS# - -

Search Filter Exact Match?

Client Demographics

SSN Data Quality

Date of Birth (mm/dd/yyyy)

Gender

Primary Race

Secondary Race

Ethnicity

Complete all fields, including SSN Data Quality—if the client doesn't know, have, or refuses to give the SSN, the SSN Data Quality field will satisfy HUD's requirements.

The following box will appear: "About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?" Click **OK**. This is reminding you to search for clients first so that duplicate files aren't entered.



Profile

You can reach the Profile screen in the following ways: 1) When you click on the client's name from the Add/Find screen, 2) when you click on Add Client with This Information, or 3) when you click on the Profile tab from within a client's file.

Notice that the name and any other information you entered in the Add/Find screen carried over to the profile.

If you are adding to an existing file, some of the information you saw in the Possible Matches might not be visible on the Profile. This is because the client did not give any other agency permission to share the file. Be VERY CAREFUL entering the date of birth, ethnicity, and gender; if you make a typo it will affect other agencies.

1. You will now be on the Client Profile Page. Continue adding information about the client, being sure to answer ALL RED HUD-REQUIRED QUESTIONS; click **Save Changes**.

Added to System Jan 22 2008 02:01PM

First MI Last Suffix

SS# - -

SSN Data Quality

Age 47

Universal Elements

Assessment Date :

Date of Birth (mm/dd/yyyy) H G

Gender H G

Ethnicity H G

Primary Race H G

Secondary Race H G

U.S. Military Veteran? H G

Zip Code of Last Permanent Address H G

Zip data quality H G

Driver's License Number H G

Issuing State for ID H G

Non-confidential notes H G

Don't Click Back Date

All Red questions are required by HUD

Household Information

Create households when a client is living with or sharing custody of their dependent(s) or a couple without children. Do not create a household for a single individual. A household must contain at least one adult and one child or 2 adults; unless a juvenile is a parent, in which case there would be 2 minors in the household.

1. To attach household members to the client's file, click the blue **Household Information** link, and then click **Start New Household**.

Client - Roberts, Norville (19)
 Release of Info: Ends 01/1/2009

Household Information - 1 Households - Click to Expand

Households Overview - Click to Collapse

Type	Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
------	-------	--------------	--------------	--------------	-------------------	----------------

2. Complete the information for the head of household, and again, click **Start New Household**.

Add Client to Household - (Norville Roberts)

Household Type: Male Single Parent

Head of Household: Yes

Relationship to Head of Household: Self

Date Entered: 01/22/2008 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Start NEW Household Cancel

Leave Blank

*Data Entry Tip: Don't complete **Date Removed** field. Always leave it blank.*



3. Answer questions about the next household member and then enter client's name and click **Search for Client**.

Household Member Information

Head of Household: No
 Relationship to Head of Household: Son
 Date Entered: 01/22/2008 (mm/dd/yyyy)

Add Using Client ID.

Scan or Enter Client ID:

Add Additional Clients to Household

"Search for Client" before adding a new client.

Last Profile: -Select-

First: Robert Last: Roberts

SS#: - -

Search Filter: Exact Match?

Answer questions about dependent.

Enter dependent's name and search for client.

4. If your client is not already in the system, continue entering his/her information. Notice that SSN Data Quality, Primary Race, and Ethnicity are already filled in. If these need to be changed, do so.

Add Client With This Information

Change your criteria and "Search for Client" to reduce the potential matches.

Last Profile: -Select-

First: Robert Last: Roberts

SS#: - -

Search Filter: Exact Match?

Client Demographics

SSN Data Quality: Don't Know or Don't Have SSN (HUD)
 Date of Birth: (mm/dd/yyyy)
 Gender: - Select -
 Primary Race: White (HUD)
 Secondary Race: - Select -
 Ethnicity: Other (Non-Hispanic/Latino)

SSN Data Quality, Race & Ethnicity have default answers—change them as necessary.



- Once all fields are complete, click **Add Client With This Information**.

Add Additional Clients to Household

"Search for Client" before adding a new client.

Last Profile:

First: MI Last: Suffix:

SS#: - -

Search Filter: Exact Match?

Client Demographics

Information contained in the following fields will be carried forward to the next screen and is also used when adding a client.

SSN Data Quality:

Date of Birth: (mm/dd/yyyy)

Gender:

Primary Race:

Secondary Race:

Ethnicity:

- As entered, household members will appear at the top of the screen.

Overview - Type: Male Single Parent, Current Members: 3 Removed Members: 0					
					<input type="button" value="Edit Household Type"/>
	Name	Relationship	Date Entered	Date Removed	Head of Household
	▶ Roberts, Norville (#1719)	Self	01/22/2008		Yes
	Roberts, Robert (#1721)	Son	01/22/2008		No
	Roberts, Bertie (#1722)	Daughter	01/22/2008		No



- Repeat above steps until all household members are entered. When all clients are entered into the household, click **Save & Exit**.

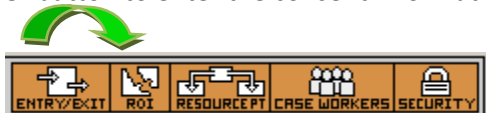
*Household Data Entry Tip: Be sure to click **Add Client With This Information** for every client—if you select **Save & Exit** before adding a client, that client’s data will not save.*

- The Profile screen will refresh to show the Households Overview.

Type		Count	Relationship	Date Entered	Date Removed	Head of Household	Monthly Income
Male Single Parent		H 3					
Roberts, Norville			Self	01/22/2008		Yes	
Roberts, Robert			Son	01/22/2008		No	
Roberts, Bertie			Daughter	01/22/2008		No	

Release of Information

1. Click on the orange ROI button to enter the consent information for the household—a new screen will appear.



2. Click **Add Release**.

Release of Information (Norville Roberts)			
Provider	Permission	Start Date	End Date
No Release of Information found for this client.			

3. If the dependents' release info is the same as the Head of Household's, check the boxes next to their names.

For questions on release of information parameters, see Client Consent Explanation on next page.

4. Complete the Release of Information.

5. Click **Save Release Info**.


Release of Information - (Roberts, Norville)	
<input type="button" value="Save Release Info"/> <input type="button" value="Cancel"/>	
Household members	
<p>To include household members in this release of info, click on the box beside each name. Note: Only members from the same household may be selected.</p> <p>Household #1 Members:</p> <p><input checked="" type="checkbox"/> *Roberts, Bertie</p> <p><input checked="" type="checkbox"/> *Roberts, Robert</p>	
Release of Info Data	
Provider	ABC Agency (#4) <input type="button" value="v"/>
Release granted?	Yes <input type="button" value="v"/>
Start Date	01/22/2008
End Date	01/22/2009
Documentation	Signed Statement from Client <input type="button" value="v"/>
Witness	HB
<input type="button" value="Save Release Info"/> <input type="button" value="Cancel"/>	


If dependents have the same release parameters, check the boxes next to their names.

 Select the agency as the Provider and complete the rest of the fields.

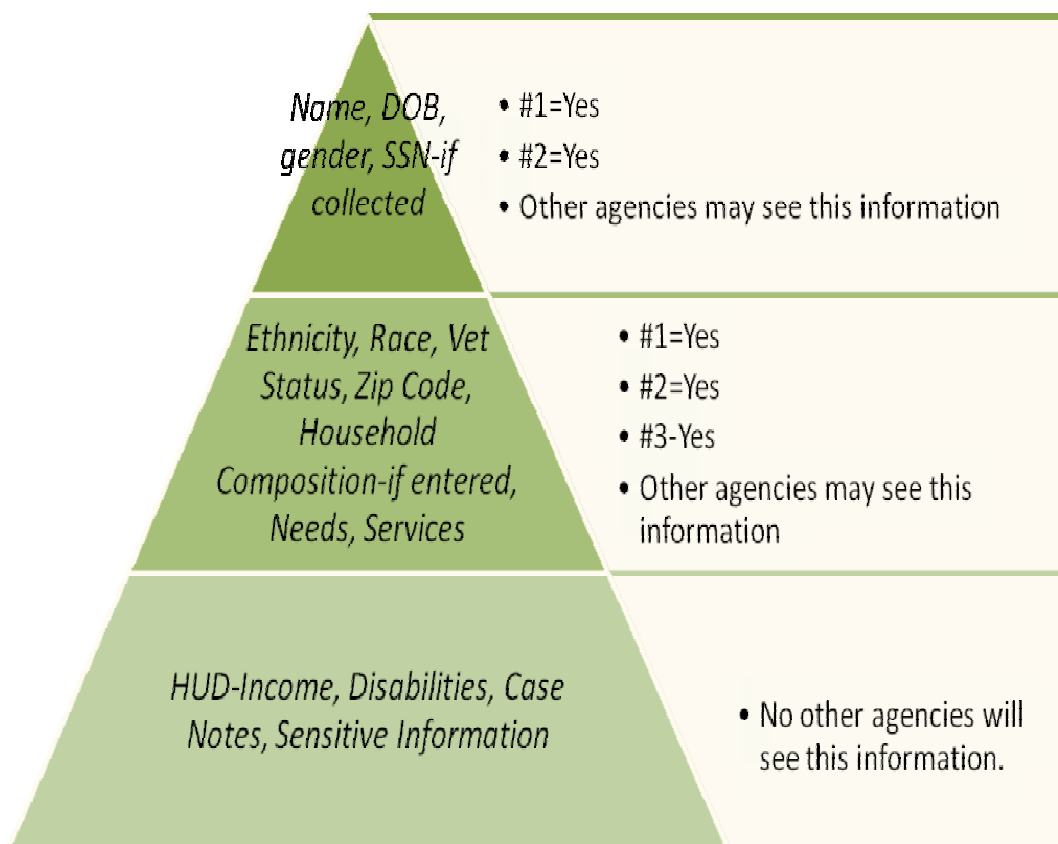


6. Another small screen will appear showing you that the release has been added; **Close** this window.

Release of Information (Norville Roberts)			
Provider	Permission	Start Date	End Date
 ABC Agency	Yes	01/22/2008	01/22/2009



CHIN HMIS Client Consent



Recording Participation in a Program—Entry/Exit Worksheets

1. Click on the orange Entry/Exit button at the top of the page—a new screen will appear.



2. Click **Add Entry/Exit**.

Entry/Exit (Roberts, Norville) Add Entry/Exit Close

Program	Type	Entry Date	Exit Date
No Entry/Exits found for this client.			

Note: Household members must be established on Profile before creating Entry/Exits.

Data Entry Tip: Once you select Add Entry/Exit you'll see the Household Data Sharing box at the top of the screen. First, complete the Entry Data, and then return to Household Data Sharing.

There are 4 important items you must remember on the Entry/Exit screen:

1. *Provider = Program (not agency). You must select the program that is providing the services.*
2. *Type = HUD 40118. If you must submit an APR or ESG report, you want to select HUD 40118 as the entry type in order to have an accurate report.*
3. *All red questions are required by HUD.*
4. *IF you change the date on the client's entry/exit, after you complete all the fields and click **SAVE**, the Zip Code, Zip Data Quality, and Vet Status will disappear. This happens because the client was created (and this is where this data was originally input) on a date after the Entry was created. There are 2 ways to fix this:*
 - *If the client is NOT attached to a household (is single), then simply re-answer the questions and click **SAVE**.*
 - *If the client has a household, complete the Household Data Sharing—this will complete these "missing fields" for other household members and the Head of Household's file.*



3. Check the boxes next to household members' names that are also entering the program.
4. Complete the fields—be careful to make sure the entry date is the date the client actually entered the program. *See note on previous page regarding Entry Date*

Household members

To include household members in this entry/exit, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

*Roberts, Bertie

*Roberts, Robert

Entry Data

Provider: ABC APR Program (#107) Provider = Program

Type: HUD-40118 Type = HUD 40118

Entry Date: 01/22/2008 02 : 40 PM

Is client a Juvenile Parent? H G

Type of Living Situation-HUD H G

Type of Living Situation-NC H G

Length of Stay-HUD H G

Is Client Homeless? H G

Is Client Chronically Homeless? H G

Homelessness Primary Reason H G

Zip Code of Last Permanent Address H G

Zip data quality H G

U.S. Military Veteran? H G

Domestic Violence Victim? H G

Do you have a disability of long duration? H G

All red questions
are HUD
required.

Living Situation Note: Living Situation-NC PiT answer should be the same as the HUD answer EXCEPT when a client was in a public institution (jail, mental health facility, hospital, substance abuse treatment center, juvenile detention center) before coming to your agency AND was there less than 30 days. For example: Norville was staying with friends. He went into the hospital and stayed there 2 weeks. He left the hospital and went to an emergency shelter. Select "Living with friends" for the Living Situation-HUD and "Hospital" for Living Situation-NC PiT.

5. Once all fields are complete, click **Save**.
6. If the client has a Disability or Income, be sure to complete the Disability and Monthly Income Assessments.



Adding a Disability

If you selected **Disability** as **Homelessness Primary Reason** or **Yes** for **Disability of Long Duration**, you must complete a Disability Assessment. Also, to answer yes for the above questions, the client must have a *diagnosed* disability.

1. If the client has a disability, click **Add** at the bottom of the Entry Data Screen in the Disability Information box.

Homelessness Primary Reason: Disability (ESG) H G

Zip Code of Last Permanent Address: 28805 H G

Zip data quality: Full Zip Code Recorded (HUD) H G

U.S. Military Veteran?: No (HUD) H G

Domestic Violence Victim?: No H G

Do you have a disability of long duration?: Yes (HUD) H G

Disability Information

Disabilities		Add
Disability Type		
No Record Sets		
Show Entire List In Window		

Monthly Income

Monthly Income			Add
Last 30 Day Income	Source of Income	Last 90 Day Income	
No Record Sets			
Show Entire List In Window			



2. A new window will appear. Complete the fields.

Client Name: Roberts, Norville
Client ID: 1719
Disabilities

Save & Add Another Save & Exit Exit

Assessment Date: 01/22/2008 02:40 PM

Disability Type: Developmental (HUD 40118)

If SA, substance of choice: H G

Note on Disability:

Above condition is going to be long term?: Yes H G

Start Date: 01/22/2008 (mm/dd/yyyy) H G

End Date: (mm/dd/yyyy) H G

Client Name: Roberts, Norville
Client ID: 1719
Disabilities

Save & Add Another Save & Exit Exit

If client had a disability before coming to your agency, enter a Start Date before or on the day of entry.

Complete End Date if client becomes no longer disabled.

3. Click **Save & Add Another** if there are multiple disabilities, and click **Save & Exit** when finished.



Tracking Monthly Income

Use the Monthly Income assessment to record any income for your client. This is particularly useful when trying to report a client’s financial gains while at your agency.

1. If the client has any income source, click **Add** at the bottom of the Entry Data Screen in the Monthly Income box.

The screenshot shows a form with several sections. The top section is 'Homelessness Primary Reason' with dropdown menus for 'Disability (ESG)', '28805', 'Full Zip Code Recorded (HUD)', 'No (HUD)', and 'Yes (HUD)'. Below this is a 'Disability Information' table with an 'Add' button. The 'Monthly Income' section is a table with columns for 'Last 30 Day Income', 'Source of Income', and 'Last 90 Day Income', also featuring an 'Add' button. A large green arrow points from the 'Add' button in the Monthly Income section towards the right.

2. A new screen will appear. Complete the fields.

The screenshot shows a 'Monthly Income' assessment form for Client Roberts, Norville (ID: 1719). The form includes fields for 'Assessment Date' (01/22/2008 02:40 PM), 'Last 30 Day Income' (330.00), 'Source of Income' (A Veteran's Disability Payment (HUD)), 'Last 90 Day Income', 'Start Date' (08/18/2000), and 'End Date'. A green callout box on the right explains: 'Start Date refers to the date the client started receiving income, disability benefits, or other any other benefits or income.' and 'End Date refers to the date the client stopped receiving income or benefits.'

3. Click **Save & Add Another** to record multiple income sources. Click **Save & Exit** when done.

ADDING HOUSEHOLD DATA

1. Click **Add Household Data**.

Name	Entry Date	Exit Date	Reason Leaving	Destination
Roberts, Bertie	01/22/2008			
▶ Roberts, Norville	01/22/2008			
Roberts, Robert	01/22/2008			

2. A new window will appear.
3. Check the boxes next to the household members' names.
4. Complete the fields that are correct for the *majority* of household members. (See the next page for instructions for household members with different data.)

Household members

To include household members in this "Household Assessment", click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

- *Roberts, Bertie
- *Roberts, Robert

Household Data Sharing Assessment

Assessment Date: 01/22/2008 02:40 PM Back Date

If enrolling in a program, do this at Entry screen

Is client a Juvenile Parent? No H G

Zip Code of Last Permanent Address: 28805 H G

Zip data quality: Full Zip Code Recorded (HUD) H G

U.S. Military Veteran? No (HUD) H G

Domestic Violence Victim? No H G

Do you have a disability of long duration? No (HUD) H G

Is Client Homeless? Yes H G

Is Client Chronically Homeless? No H G







Type of Living Situation-HUD: Living With Family (HUD) H G

Type of Living Situation-NC: Living With Family (HUD) H G

Length of Stay-HUD: More than one week, but less than one month (HUD) H G

Homelessness Primary Reason: Unemployment (ESG) H G

5. Click **Save and Close**—you'll be taken back to the Entry/Exit Screen where you'll be able to see the Entry/Exit Overview:

Overview - HUD-40118		
Name	Entry Date	Exit Date
Roberts, Bertie	 01/22/2008	
▶ Roberts, Norville	 01/22/2008	
Roberts, Robert	 01/22/2008	

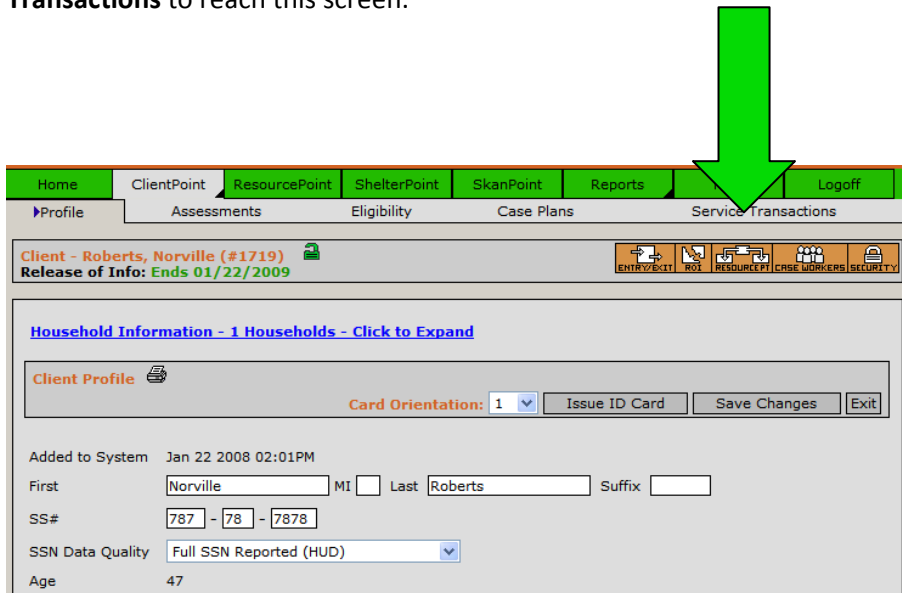
Instructions for Household Members with Different Data: You can change the answers for the 1st client after you save the Household Data by changing it on the Entry Worksheet. If OTHER household members have different answers, click on the pencil next to the other client's name—this will take you into that client's entry data file. From here change the necessary fields.

For example: Norville Roberts comes to your agency with his 2 children. He is a veteran and needs shelter. You create files for Norville and his 2 children in ClientPoint. After completing their Release of Information you input their entry data. First you complete Norville's entry data, answering that he is a veteran. Next you complete the Household Data Sharing Fields. The household members all share the same information except that the children are not veterans—you select NO for Veteran Status and Save the information. You then go back into Norville's file and change his Veteran Status back to YES and Save the information again. Now, the children's data and Norville's is correct, but you didn't have to complete separate entry forms for each household member.



Recording Services, Needs and Referrals

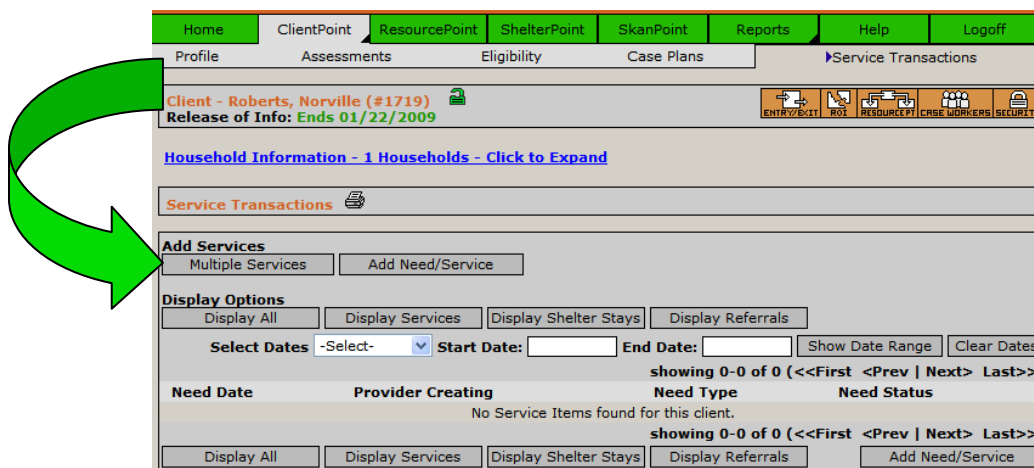
You can record single needs and services, multiple services, unmet needs, and referrals. Select **Service Transactions** to reach this screen.



Recording Multiple Services

Choose Multiple Services to easily record multiple services from one screen.

1. To record more than one service at a time, select **Multiple Services**.



2. Check boxes next to household members who are receiving the same services.
3. For **Provider**, select the **Program** the client is entering.
4. Complete fields:
 - **# of Services** defaults to 1; this can be changed if necessary. For example, if you want to record the actual number of times a client used the phone, you would record that here.
 - Select the **Service** your program is providing from the drop down menu.
 - Select the **Start Date** to record when the client began receiving services.
 - **End Date** defaults to today's date. If you know a specific End Date, enter it. If you leave the End Date blank it will only record services provided on the Start Date.
 - Optional: **Source** and **Cost of Service** can be used to track grant sources. It is not required for the APR, but can be used in reports to track cost of providing services.
 - Optional: **# of Units** and **Unit Type** can be used to describe what was provided. For example, you could record that 5 bus passes (**# of Units**) were in a transportation book (**Unit Type**).
 - Optional: **Cost of Unit** can be used to record the cost of unit. For example, the bus pass cost \$.50.
 - **Status** records whether needs were met, not met, or referred. While Status is not necessary for the APR, if your agency and/or program wants to run a Needs Report, Status must be selected.
 - Identified = Need Referred to another agency
 - In Progress = Ongoing Service your agency is providing
 - Closed = Your agency met the need

Household members

To include household members in these services, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

*Roberts, Bertie

*Roberts, Robert

Multiple Services

Warning: Be sure to select the correct provider before entering data in the Service List. If you change the Provider, the page will refresh to make adjustments for the new provider's defaults. Any data that is currently in the Service List will be removed and you will need to re-enter it.

Provider ABC APR Program (#107)

Service List

# of Services	1	Service	Case/Care Management
Start Date	01/24/2008 12 : 53 PM	End Date	01/24/2008 12 : 53 PM
Source 1	-Select-	Cost of Service 1	
Source 2	-Select-	Cost of Service 2	
# of Units		Unit Type	-Select-
Status	Closed	Cost of Unit	

Cancel Clear

Services

Add Another Cancel All Clear All Save And Exit Exit

5. Select **Add Another** to

continue adding services; record the services provided in each box.



6. When done, click **Save & Exit**.

Multiple Services

Warning: Be sure to select the correct provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be reentered.

Provider: ABC APR Program (#107)

Service List

# of Services: 1	Service: Case/Care Management
Start Date: 01/24/2008 12 : 53 PM	End Date: 01/24/2008 12 : 53 PM
Source 1: -Select-	Cost of Service 1: []
Source 2: -Select-	Cost of Service 2: []
# of Units: [] Unit Type: -Select-	Cost of Unit: []
Status: Closed	
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>

# of Services: 1	Service: Clothing
Start Date: 01/24/2008 12 : 53 PM	End Date: 01/24/2008 12 : 53 PM
Source 1: -Select-	Cost of Service 1: []
Source 2: -Select-	Cost of Service 2: []
# of Units: [] Unit Type: -Select-	Cost of Unit: []
Status: Closed	
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>

# of Services: 1	Service: Personal/Grooming Supplies
Start Date: 01/24/2008 12 : 53 PM	End Date: 01/24/2008 12 : 53 PM
Source 1: -Select-	Cost of Service 1: []
Source 2: -Select-	Cost of Service 2: []
# of Units: [] Unit Type: -Select-	Cost of Unit: []
Status: Closed	
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>

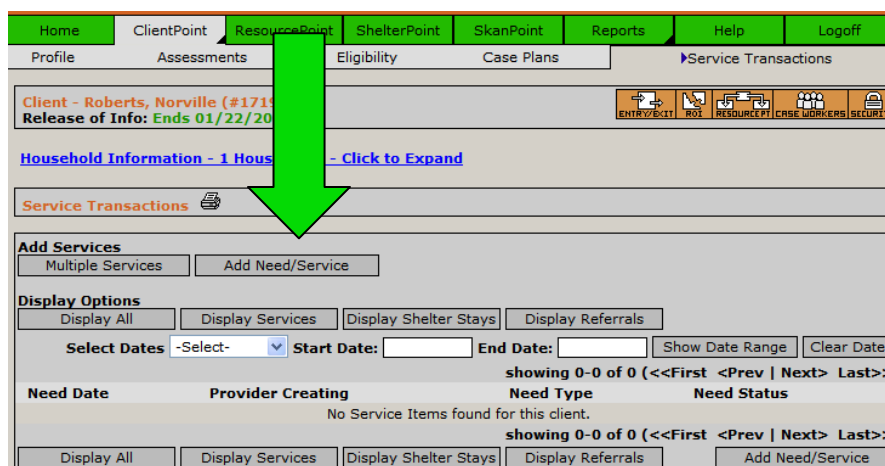
Services

Each time you click **Add Another**, a new box will appear to record services.

Recording a Single Service

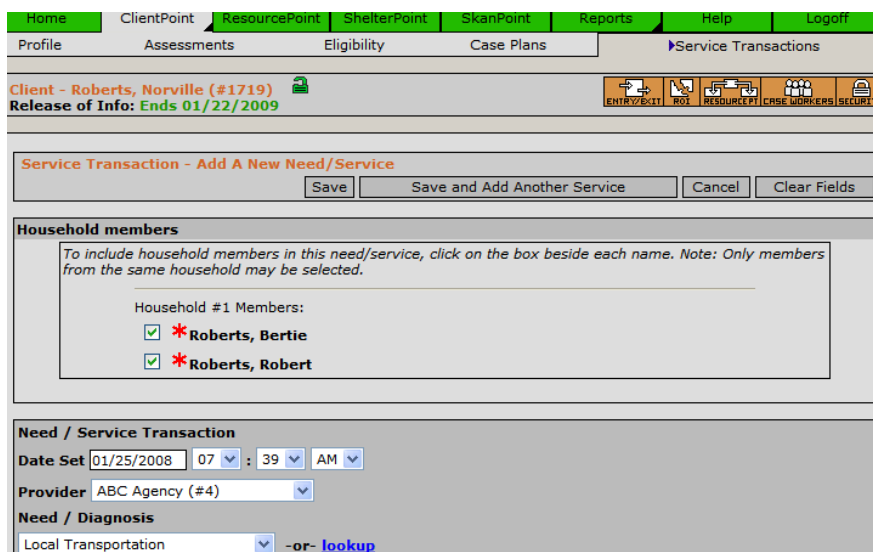
Record a single need and/or service in order to make referrals, track referrals and unmet needs, and to be able to add non-confidential notes about the need. Also use this function to record **Unmet Needs**. For Unmet Needs, only complete the fields in the **Needs** section (Leave **Services** blank) and click **Save**.

1. Select **Add Need/Service**.



The screenshot shows the ClientPoint interface for a client named Roberts, Norville (#1719). The 'Service Transactions' section is active, and the 'Add Services' sub-section is visible. A large green arrow points to the 'Add Need/Service' button. Below this, there are 'Display Options' and 'Select Dates' fields. The 'Need Date' and 'Provider Creating' fields are empty, and the 'Need Status' is 'No Service Items found for this client.' The 'Add Need/Service' button is highlighted.

2. Check boxes next to household members who have the same need and are receiving the same service.



The screenshot shows the 'Service Transaction - Add A New Need/Service' form. The 'Household members' section is expanded, showing two members: Roberts, Bertie and Roberts, Robert, both with checked boxes. The 'Need / Service Transaction' section is visible, with 'Date Set' set to 01/25/2008 07:39 AM, 'Provider' set to ABC Agency (#4), and 'Need / Diagnosis' set to Local Transportation. The 'Save' button is highlighted.



3. The screen is split between **Need** information and **Service** information. Remembering that the *Agency diagnoses the Need* and the *Program provides the Service*, complete the fields:

Need / Service Transaction

Date Set: 01/25/2008 07 : 39 AM

Provider: ABC Agency (#4)

Need / Diagnosis

Local Transportation -or- [lookup](#)

Local Transportation

Need

Financial Amount: Notes about Need:

Service

Service Provider: ABC APR Program (#107)

Start Date: 01/25/2008 07 : 39 AM End Date: : :

Provider-specific Service: -Select-

Service Notes:

Service Type: -Select Service from Quicklist-
-or- [lookup](#) -or- [Same As Need](#)
Local Transportation

Source 1: -Select- Cost Of Service 1:

Source 2: -Select- Cost Of Service 2:

of Units: Unit Type: -Select- Cost of Units:

Service Followup Date: Actual Followup Date: Followup Made: -Select-

- **Date Set** should be the day the need was diagnosed.
- **Provider** is the Agency (Agency Diagnoses the Need).
- For **Need/Diagnosis**, select the client's need from the drop-down menu.
- Optional: **Financial Amount** is for your agency's tracking needs.
- Optional: **Notes about Need** allows you to write non-confidential notes about your client's needs. Depending on the client's level of consent, these notes may be viewed by other agencies.
- **Service Provider** is the program that is providing the service.
- Select the **Start Date** to record when the client began receiving services.
- **End Date** defaults to today's date. If you know a specific End Date, enter it.
- Optional: **Provider Specific Service** is if your agency provides a special service that is not in the AIRS taxonomy.
- Select **Service Type** from the drop down menu, or click [lookup](#) to search for a service in the AIRS taxonomy. You can click [Same As Need](#) to automatically fill in the same service as the need that was diagnosed.
- Optional: **Service Notes** allows you to write non-confidential notes about the service.
- Optional: **Source** and **Cost of Service** can be used to track grant sources. It is not required for the APR, but can be used in reports to track cost of providing services.



- Optional: **# of Units** and **Unit Type** can be used to describe what was provided. For example, you could record that 5 bus passes (# of Units) were in a transportation book (Unit Type).
- Optional: **Cost of Unit** can be used to record the cost of unit. For example, the bus pass cost \$.50.
- Optional: Record a date to follow up with the client in **Service Followup Date**.
- Optional: Record the **Actual Followup Date**.
- Optional: Select whether a **Followup** was **Made**.

4. When all necessary fields are complete, click **Save**.

Making a Referral

Record Referrals from the **Add Need/Service** page. To make a referral, record the **Needs**, but leave the **Service** information blank.

1. Select **Referral Date**.

Referral

Referral Date

Check this box to notify ServicePoint Providers by Email.

Refer To

Provider #1 -or- [lookup](#) , [bed avail](#)
 [Clear](#)

Provider #2 -or- [lookup](#) , [bed avail](#)
 [Clear](#)

Provider #3 -or- [lookup](#) , [bed avail](#)
 [Clear](#)

Provider #4 -or- [lookup](#) , [bed avail](#)
 [Clear](#)

Provider #5 -or- [lookup](#) , [bed avail](#)
 [Clear](#)

Projected Followup Date

Status and Outcome

Status Outcome If Not Met, Reason

Service Transaction - Add A New Need/Service

2. Do not use *Check this box to notify ServicePoint Providers by Email*.

3. Select referring agency in **Provider** boxes.

4. Optional: Enter a **Projected Followup Date**.

5. Optional: **Status** records whether needs were met, not met, or referred. While Status is not necessary for the APR, if your agency and/or program wants to run a Needs Report, Status must be selected.
 - Identified = Need Referred to another agency
 - In Progress = Ongoing Service your agency is providing
 - Closed = Your agency met the need

6. Optional: **Outcome**
 - Service Pending
 - Fully Met
 - Partially Met
 - Not Met

7. Optional: **If Not Met, Reason**
 - All Services Full
 - Client Not Eligible
 - Client Refused Service
 - Service Does Not Exist
 - Service Not Accessible

Viewing Services Provided

You can view Needs Diagnosed, Services Provided, Unmet Needs, Referrals, and Shelter Stays from the **Service Transactions** page. Select one of the following options: **Display All**, **Display Needs**, **Display Services**, **Display Shelter Stays**, or **Display Referrals**.

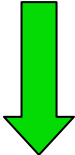
Display All View:

Transaction Type	Date	Provider	Type	Need Status	Need Outcome
Need	01/24/2008	ABC Agency	Case/Care Management	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Case/Care Management	Closed	Fully Met
Need	01/24/2008	ABC Agency	Clothing	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Clothing	Closed	Fully Met
Need	01/24/2008	ABC Agency	Personal/Grooming Supplies	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Personal/Grooming Supplies	Closed	Fully Met



ShelterPoint

ShelterPoint allows you to place clients in a bed, hold beds, create waiting lists, check out a list of clients or a single client, and check bed availability at other shelters. You can either place an existing client in a bed, or you can enter a new client and place them in a bed from this screen. You can also complete the ROI and provide services from ShelterPoint. To reach this screen, click on the green ShelterPoint tab at the top of the page.




Home ClientPoint ResourcePoint **ShelterPoint** SkanPoint Reports Help Logoff

View Bedlists For Provider

ABC APR Program

Place a Client in a Bed

1. Select the **Provider (Program)** from the drop down menu (**View Bedlists for Provider**).
2. Click **Submit**.
3. Select the **Bedlist** from **View Information for Bedlist**.
4. Click **Submit**.
5. Click **Empty**.



Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Help Logoff

View Bedlists For Provider ABC APR Res

[Check Bed Availability](#)

View Information For Bedlist

Note: Households must be established in ClientPoint before making reservations for or checking in Families.

Reservations for Bedlist - Emergency Shelter

	Arrival Date	Client	DOB	Gender	Group ID
cancel reservation checkin	01/14/2008	Que, Suzy (#1579)	01/12/1970	Female	
cancel reservation checkin	01/15/2008	Mo...		Male	

Bedlist (Emergency Shelter - Emergency Shelter)

Floor	Room	Bed	Hold	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
Families	1	F-01	Hold	EMPTY					
Families	1	F-02		Jones, Karen A (#1579)	08/31/1950	Female	9915	No	
Families	1	F-03		Jones, Charles J (#1582)	06/04/2005	Male	9915	No	
Families	1	F-04	Hold	EMPTY					

Click Empty next to the bed in which you'd like to place your client.



6. A new screen will appear. From here, either place an existing client in a bed or create a new client.
7. You have 3 options for placing an existing client in a bed:
 - Enter the client's ID # and click **Search this id**.
 - Select a client you recently worked with from **Last Profile**.
 - Enter the client's first and last name and click **Search for Client**

The screenshot shows a web form with two main sections: "Search Using Client ID" and "Check In Client".

Search Using Client ID: This section contains a text input field labeled "Scan or Enter Client id" with the value "1719" and a button labeled "Search this id". A green callout bubble points to the button with the text "Enter Client ID."

Check In Client: This section contains a heading "Check In Client" and a sub-heading "Search for Client" before adding a new client. It includes several input fields and a button:

- Last Profile:** A dropdown menu with "-Select-" selected. A green callout bubble points to it with the text "Select client from Last Profile."
- First:** A text input field with "N" entered.
- MI:** A checkbox.
- Last:** A text input field with "Roberts" entered.
- Suffix:** A text input field.
- SS#:** Three text input fields separated by dashes.
- Search Filter:** A checkbox labeled "Exact Match?".
- Search For Client:** A button at the bottom of the section. A green callout bubble points to it with the text "Enter client's Name and Search for Client."

8. A new screen will appear. Complete the fields:
- **Date In** is the date the client began staying at the shelter.
 - Optional: **Supplies Given** records anything lent to the client during his/her stay.
 - Optional: **Locker #** records the locker assigned to the client.
 - Optional: **Codes/Notes** records any non-confidential notes.


Date In	01/27/2008 10 : 55 AM Midnight Checkin
Bed Name/Number	Families 1 F-04
Supplies given	linens, towels
Locker #	321
Codes/Notes	

Household members	
<i>To checkin household members also, click on the box beside each name. Then assign each member a bed. If no bed is specified, an Overflow bed will be used. Note: Only members from the same household may be selected.</i>	
Household #1 Members:	
<input checked="" type="checkbox"/> *Roberts, Bertie	Assign Bed 
<input checked="" type="checkbox"/> *Roberts, Robert	Assign Bed 

9. To assign household members to beds, check the boxes next to their names and click **Assign Bed**. A new screen will appear.

10. Place client in bed by selecting bed name/number.

11. Click **Submit**.

Quicklist
Beds:
-Select- 
-Select-
Families 1 F-01
Families 1 F-04
Families 2 F-05
Families 2 F-06
Families 2 F-07
Families 2 F-08
Families 3 F-09
Families 3 F-10
Families 3 F-11
Families 3 F-12



12. The screen will refresh to show bed placement.

Bed Stay Data - Norville Roberts #1719 (Male 09/09/1960 787-78-7878)

Date In: 01/27/2008 10 : 55 AM [Midnight Checkin](#)

Bed Name/Number: Families 1 F-04

Supplies given:

Locker #:

Codes/Notes:

Household members

To checkin household members also, click on the box beside each member to assign each member a bed. If no bed is specified, an Overflow bed will be assigned. Members from the same household may be selected.

Household #1 Members:

<input checked="" type="checkbox"/>	*Roberts, Bertie	1521	Families 2 F-05	<input type="button" value="Assign Bed"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	*Roberts, Robert			<input type="button" value="Assign Bed"/>	<input type="checkbox"/>

Bed Name and Number.

13. Repeat for each household member needing bed placement.

14. On this same screen you can enter the client's ROI (see p. 10 for instructions), and record multiple services (See p. 18 for instructions).

Household #1 Members:				
<input checked="" type="checkbox"/>	*Roberts, Bertie	1521	Families 2 F-05	Assign Bed <input type="checkbox"/>
<input checked="" type="checkbox"/>	*Roberts, Robert	1522	Families 2 F-06	Assign Bed <input type="checkbox"/>

Infractions for Norville Roberts				
Banned Start	Banned End	Infraction	Ban Code	Provider
No Infractions found for this client.				

Release of Information Data

Release of Info: Ends 01/22/2009

Services

Add Another Cancel All

Multiple Services

Warning: Be sure to select the correct provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be reentered.

Provider: ABC APR Program (#107)

Service List				
# of Services	1	Service	-Select-	
Start Date	01/27/2008	11	: 16	AM
End Date	01/27/2008	11	: 16	AM
Source 1	-Select-			Cost of Service 1
Source 2	-Select-			Cost of Service 2
# of Units		Unit Type	-Select-	Cost of Unit
Status	Identified			
<input type="button" value="Cancel"/> <input type="button" value="Clear"/>				

From here, you can enter the ROI (see. p. 10)

You can also provide services. REMEMBER, PROVIDER = PROGRAM (see p. 18)



Holding a Bed

1. Click on the **Hold** link next to the bed to be held. This is useful when the bed is broken or can't be used because it's in a family room. To remove the hold, click on the **Held** link.

Bedlist (Emergency Shelter - Emergency Shelter)										
		Display	All Beds	Sort By	Bed	Ascending	Filter			
Floor	Room	Bed	Hold	Client	DOB	Gender	Group ID	Conf.	Codes/Notes	
Families 1	1	F-01	Hold All	EMPTY						
Families 1	1	F-02	Hold	Jones, Karen A (#1579)	08/31/1950	Female	9915	No		
Families 1	1	F-03	Hold	Jones, Charles J (#1582)	06/04/2005	Male	9915	No		
Families 1	1	F-04	Hold	EMPTY						
Families 2	2	F-05	Hold	HELD						
Families 2	2	F-06	Hold	EMPTY						
Families 2	2	F-07	Hold	EMPTY						
Families 2	2	F-08	Hold	EMPTY						
Families 3	3	F-09	Hold	EMPTY						
Families 3	3	F-10	Hold	EMPTY						
Families 3	3	F-11	Hold	EMPTY						
Families 3	3	F-12	Hold	EMPTY						

Click **Hold** to place a hold. Click **Held** to remove the hold.

Creating a Reservation/Waiting List

1. Click on **Add Reservation**; a new screen will appear.

Home	ClientPoint	ResourcePoint	ShelterPoint	ScanPoint	Reports	Help	Logoff
View Bedlists For Provider: ABC APR Program <input type="button" value="Submit"/>							
Check Bed Availability							
View Information For Bedlist: Emergency Shelter <input type="button" value="Submit"/>							
<i>Note: Households must be established in ClientPoint before making reservations for or checking in Families.</i>							
Reservations for Bedlist - Emergency Shelter							<input type="button" value="Add Reservation"/>
	cancel reservation	checkin	Arrival Date	Client	DOB	Gender	Group ID
	cancel reservation	checkin	01/14/2008	Que, Suzy (#1600)	04/13/1970	Female	
	cancel reservation	checkin	01/15/2008	Mouse, Monster (#1313)	02/25/1928	Male	

Click Add Reservation



2. You have 3 options for placing an existing client on a reservation list:
 - Enter the client's ID # and click **Search this id**.
 - Select a client you recently worked with from **Last Profile**.
 - Enter the client's first and last name and click **Search for Client**.

The screenshot shows a web form with the following sections and elements:

- Search Using Client ID.**: A section with a text input field containing "1719" and a button labeled "Search this id". A green callout bubble points to the button with the text "Enter Client ID."
- Add Reservation**: A section with a heading and a sub-heading: "Search for Client" before adding a new".
- Last Profile**: A dropdown menu currently showing "-Select-". A green callout bubble points to it with the text "Select client from Last Profile."
- First**: A text input field containing "Roberts, Norville".
- MI**: A small checkbox.
- Last**: A text input field containing "Roberts".
- Suffix**: A small text input field.
- SS#**: Three separate text input fields separated by hyphens.
- Search Filter**: A checkbox labeled "Exact Match?".
- Search For Client**: A button at the bottom of the form. A green callout bubble points to it with the text "Enter client's Name and Search For Client."

3. You can also create a new client from this screen.
4. Click **Continue With Reservation**; a new screen will appear.
5. Select **Reserve Date**.
6. Check household members' boxes if you'd like to add them to the reservation.

7. Click **Save & Continue**.

Bed Reservation Data - Norville Roberts (Male 09/09/1960 787-78-7878)

Reserve Date

Household members

*To make reservations for household members also, click on the box beside each name.
Note: Only members from the same household may be selected.*

Household #1 Members:

*Roberts, Bertie

*Roberts, Robert

Infractions for Norville Roberts

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No Infractions found for this client.						

8. The Bedlist will refresh, showing reservations.

Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Help Logoff

View Bedlists For Provider

[Check Bed Availability](#)

View Information For Bedlist

Note: Households must be established in ClientPoint before making reservations for or checking in Families.

Reservations for Bedlist - Emergency Shelter

	Arrival Date	Client	DOB	Gender	Group ID
cancel reservation checkin	01/14/2008	Que, Suzy (#1600)	04/13/1970	Female	
cancel reservation checkin	01/15/2008	Mouse, Monster (#1313)	02/25/1928	Male	
cancel reservation checkin	02/18/2008	Roberts, Bertie (#1722)	04/04/2004	Female	9935
cancel reservation checkin	02/18/2008	Roberts, Norville (#1719)	09/09/1960	Male	9935
cancel reservation checkin	02/18/2008	Roberts, Robert (#1721)	05/05/1999	Male	9935

Bedlist (Emergency Shelter - Emergency Shelter)

Display Sort By Ascending

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
Families	1	F-01	Hold	EMPTY					
Families	1	F-02		Jones, Karen A (#1579)	08/31/1950	Female	9915	No	

Moving a Client from Reservation to Bed List

1. Click **checkin** next to the client's name you want to place in a bed; a new screen will appear.

2. Complete fields:

- **Date In** is the date the client began staying in the shelter.
- Click **Assign Bed** to place client in a specific bed.
 - A pop-up window will appear; select bed name & number and click **Submit**.

- Optional: **ID**
- Optional: **Overflow Bed Name** records your name for your overflow bed.
- Optional: **Supplies Given** records any supplies lent to client.
- Optional: **Locker #** records locker assigned to client.
- Optional: **Codes/Notes** records non-confidential codes and notes.

3. Click **Save**.



- The Bedlist will refresh showing the client moved from Reservation List to bed.

Reservations for Bedlist - Emergency Shelter							Add Reservation	
		Arrival Date	Client	DOB	Gender	Group ID		
	cancel reservation	checkin	01/15/2008	Mouse, Monster (#1313)	02/25/1928	Male		
	cancel reservation	checkin	02/18/2008	Roberts, Bertie (#1722)	04/04/2004	Female	9935	
	cancel reservation	checkin	02/18/2008	Roberts, Robert (#1721)	05/05/1999	Male	9935	

Bedlist (Emergency Shelter - Emergency Shelter)										
		Display	All Beds	Sort By	Bed	Ascending				
Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Code	Note
Families 1	1	F-01	Hold	EMPTY						
Families 1	1	F-02		Jones, Karen A (#1579)	08/31/1950	Female	9915	No		
Families 1	1	F-03		Jones, Charles J (#1582)	06/04/2005	Male	9915	No		
Families 1	1	F-04	Hold	EMPTY						
Families 2	2	F-05		HELD						
Families 2	2	F-06		Roberts, Norville (#1719)	09/09/1960	Male	9935	No		
Families 2	2	F-07	Hold	EMPTY						
Families 2	2	F-08	Hold	EMPTY						

Client Norville Roberts moved from Reservation List to Bedlist.

Checking a Client Out of a Shelter

You can check clients out either individually or as a group.

To check out an individual

- Click on the green **ShelterPoint** tab.

Home ClientPoint ResourcePoint **ShelterPoint** SkanPoint Reports Help Logoff

View Bedlists For Provider:

ABC APR Program

- Select the **Provider (Program)** from the drop down menu (**View Bedlists for Provider**).
- Click **Submit**.
- Select the **Bedlist** from **View Information for Bedlist**.
- Click **Submit**.

6. Click on the client's name that you want to check out; a new screen will appear with that client's bed stay information.

Reservations for Bedlist - Emergency Shelter							Add Reservation	
		Arrival Date	Client	DOB	Gender	Group ID		
	cancel reservation	checkin	01/15/2008	Mouse, Monster (#1313)	02/25/1928	Male		
	cancel reservation	checkin	02/18/2008	Roberts, Bertie (#1722)	04/04/2004	Female	9935	
	cancel reservation	checkin	02/18/2008	Roberts, Robert (#1721)	05/05/1999	Male	9935	

Bedlist (Emergency Shelter - Emergency Shelter)										
		Display	All Beds	Sort By	Bed	Ascending	Filter			
Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes	
Families 1	1	F-01	Hold	EMPTY						
Families 1	1	F-02		Jones, Karen A (#1579)						
Families 1	1	F-03		Jones, Charles J (#1582)						
Families 1	1	F-04	Hold	EMPTY						
Families 2	2	F-05		HELD						
Families 2	2	F-06		Roberts, Norville (#1719)	09/09/1960	Male	9935	No		
Families 2	2	F-07	Hold	EMPTY						
Families 2	2	F-08	Hold	EMPTY						

Click the client's name to check him/her out of the shelter.

7. Complete fields:

- **Date In, Confirmed for Next Day Stay?, Bed Name/Number, Overflow Bed Name, Supplies Given, Locker #, Codes/Notes** all default to information originally recorded when client was checked in. This information can be changed as necessary.
- **Date Out** records the date the client checked out of the shelter.
- **Time** defaults to the current time and if not changed the client is immediately check out. If you need to change the time, do so; however, note that the time is in Central Standard Time. Also, if you enter a later time, asterisks also appear around the client's name until 1 hour after check out time, after which the client is removed from the bedlist.
- Select whether **Supplies returned**.



- Optional: **Cost of Service** and **Source** are available for your agency to track grant sources.

If the client has a check-out date in the future, you can enter that.

Bed Stay Data - Norville Roberts (Male 09/09/1960 787-78-7878)

Date In: 01/27/2008 12:25 PM
 Confirmed for Next Day Stay? No
 Bed Name/Number: Families 2 F-06 [Reassign Bed]
 ID: 1522
 Overflow Bed Name (optional):
 Supplies given: linens, towels
 Locker #: 321
 Codes/Notes:
 Date Out: 01/28/2008 12:00 PM
 Supplies returned? Yes
 Cost Of Service 1: [] Source 1: -Select-
 Cost Of Service 2: [] Source 2: -Select-

Infractions for Norville Roberts [Add new infraction to Client]

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No Infractions found for this client.						

[Save & Exit] [Save]
 [Jump To Client Profile] [Jump To Service Transactions] [Jump To Multiple Services] [Cancel]
 [Check in Additional Family Member]

- To continue checking client out, click **Save** or **Save & Exit** if you are completely done with that client’s shelter stay information; the bedlist will refresh.

View Information For Bedlist [Emergency Shelter] [Submit]

Note: Households must be established in ClientPoint before making reservations for or checking in Families.

Reservations for Bedlist - Emergency Shelter [Add Reservation]

	Arrival Date	Client	DOB	Gender	Group ID
cancel reservation checkin	01/15/2008	Mouse, Monster (#1313)	02/25/1928	Male	
cancel reservation checkin	02/18/2008	Roberts, Bertie (#1722)	04/04/2004	Female	9935
cancel reservation checkin	02/18/2008	Roberts, Robert (#1721)	05/05/1999	Male	9935

Bedlist (Emergency Shelter - Emergency Shelter)

Display: All Beds Sort By: Bed Ascending

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes Notes
Families 1	F-01	F-01	Hold	EMPTY					
Families 1	F-02	F-02	Hold	Jones, Karen A (#1579)	08/31/1950	Female	9915	No	
Families 1	F-03	F-03	Hold	Jones, Charles J (#1582)	06/04/2005	Male	9915	No	
Families 1	F-04	F-04	Hold	EMPTY					
Families 2	F-05	F-05	Hold	HELD					
Families 2	F-06	F-06	Hold	*Roberts, Norville (#1719)*	09/09/1960	Male			
Families 2	F-07	F-07	Hold	EMPTY					
Families 2	F-08	F-08	Hold	EMPTY					

Notice the asterisks around Norville’s name—these show that he has a check-out date in the future.

Also see p. 35, point 7 for more info on asterisks in ShelterPoint.

If his check-out date were that day, or in the past, his name would be removed from the bedlist.



- A pop-up window will appear asking you to confirm that you want to check out the client; click **OK**.
- From here you can also record service transactions or check in/out an additional family member.

Checking Multiple Clients Out of a Shelter

1. From your program's bedlist, click on **Transmit Today's Checkout List**.

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
Families 1	F-01		Hold	EMPTY					
Families 1	F-02			Jones, Karen A (#1579)	08/31/1950	Female	9915	No	
Families 1	F-03			Jones, Charles J (#1582)	06/04/2005	Male	9915	No	
Families 1	F-04		Hold	EMPTY					
Families 2	F-05			HELD					
Families 2	F-06			*Roberts, Norville (#1719)*	09/09/1960	Male	9935	No	
Families 2	F-07		Hold	EMPTY					
Families 2	F-08		Hold	EMPTY					
Families 3	F-09		Hold	EMPTY					
Families 3	F-10		Hold	EMPTY					
Families 3	F-11		Hold	EMPTY					
Families 3	F-12		Hold	EMPTY					
Singles Men	M-01		Hold	EMPTY					
Singles Men	M-02			Simpson, Homer (#1182)	01/01/2005	Male	9907	No	
Singles Men	M-03			Simpson, Bart (#1178)	01/01/1980	Male	9907	No	
Singles Men	M-04		Hold	EMPTY					
Singles Men	M-05		Hold	EMPTY					
Singles Men	M-06		Hold	EMPTY					
Singles Men	M-07		Hold	EMPTY					
Singles Men	M-08		Hold	EMPTY					
Singles Men	M-09			Pits, Brad D (#1260)	08/04/1969	Male	9911	No	
Singles Men	M-10		Hold	EMPTY					
Singles Women	W-01			Pits, Shiloh (#1261)	01/12/2007	Female	9911	No	
Singles Women	W-02			Que, Suzy (#1600)	04/13/1970	Female		No	
Singles Women	W-03		Hold	EMPTY					
Singles Women	W-04			Jones, Gail T (#1580)	12/16/1999	Female	9915	No	
Singles Women	W-05		Hold	EMPTY					
Overflow (new)				EMPTY					

Show Outstanding Referrals (3 total)

Update Confirmation List Transmit Today's Checkout List

Click Transmit Today's
Checkout List.

2. Check the boxes next to the clients you want to check out of the shelter.
3. Choose whether or not Supplies were returned.

Current Checkout Date: 01/27/2008 01 : 22 PM Set Dates

Checkout?	Client Name	Bed #	Date Out	Time Out	Supplies Returned?
<input type="checkbox"/>	HELD	F-05			
<input type="checkbox"/>	Jones, Charles J (#1582)	F-03	01/27/2008	01 : 22 PM	Yes
<input type="checkbox"/>	Jones, Gail T (#1580)	W-04	01/27/2008	01 : 22 PM	Yes
<input type="checkbox"/>	Jones, Karen A (#1579)	F-02	01/27/2008	01 : 22 PM	Yes
<input checked="" type="checkbox"/>	Pits, Brad D (#1260)	M-09	01/27/2008	01 : 22 PM	Yes
<input checked="" type="checkbox"/>	Pits, Shiloh (#1261)	W-01	01/27/2008	01 : 22 PM	Yes
<input type="checkbox"/>	Que, Suzy (#1600)	W-02	01/27/2008	01 : 22 PM	Yes
<input type="checkbox"/>	Simpson, Bart (#1178)	M-03	01/27/2008	01 : 22 PM	Yes
<input type="checkbox"/>	Simpson, Homer (#1182)	M-02	01/27/2008	01 : 22 PM	Yes

Check/Uncheck all Clients with current checkouts

Future Checkout Date: 01/27/2008 01 : 22 PM Set Dates

Checkout?	Client Name	Bed #	Date Out	Time Out	Supplies Returned?
<input type="checkbox"/>	HELD	F-05			
<input type="checkbox"/>	Roberts, Norville	F-06	01/28/2008	12 : 00 PM	Yes

Check/Uncheck all Clients with future checkouts

Check Out Cancel

4. Click **Check Out**; the bedlist will refresh and clients checked out will be removed from list.
5. **Update Confirmation List** is also located at the bottom of this screen. Unless you've discussed this with your regional coordinator, don't use this function. Confirming a next day's stay can cause shelter-data problems.



Exiting a Client from a Program

Make sure you always complete an Exit Worksheet whenever a client leaves your program. Also, make sure the Exit Date matches the date the client left the program.

1. From **ClientPoint**, pull up your client's file; then click on the orange **Entry/Exit** button.

The screenshot shows the ClientPoint interface. A green arrow points to the 'ClientPoint' tab in the top navigation bar. Below the navigation bar, a green callout bubble with the text 'Click on Entry/Exit.' points to the 'ENTRY/EXIT' button in the top toolbar. The main content area displays client information for 'Client - Roberts, Norville (#1719)' with a release of info ending on 01/22/2009. Below this, there is a 'Household Information' section and a 'Client Profile' form with fields for first name (Norville), last name (Roberts), SSN, and age (47).

2. A new screen will appear showing Entry/Exit information; click on the pencil under **Exit Date** to begin the Exit Worksheet.

The screenshot shows the 'Entry/Exit (Roberts, Norville)' screen. It features a table with the following columns: Program, Type, Entry Date, and Exit Date. The first row contains the data: ABC APR Program, HUD-40118, 01/20/2008, and a pencil icon indicating an edit function. A green arrow points to the pencil icon under the Exit Date column. The screen also includes buttons for 'Add Entry/Exit' and 'Close', and a note at the bottom: 'Note: Household members must be established on Profile before creating Entry/Exits.'

Program	Type	Entry Date	Exit Date
ABC APR Program	HUD-40118	01/20/2008	

3. A new screen with the Exit Worksheet will appear.
4. Complete the fields:
 - **Exit Date** defaults to today's date; change, if necessary, to the date the client left the program.
 - Select the **Reason for Leaving** from the drop down menu.
 - If the reason isn't listed, select *Other* and type reason into **If other, specify**.
 - Enter **Destination**.
 - Select **Tenure** from drop down menu.
 - Select if client is receiving any **Subsidy** from drop-down menu.
 - Enter non-confidential **Notes**.
 - Check boxes next to household members' names who are also exiting the program.
5. Click **Save and Close**.
6. For household members with different Exit Worksheet responses, click on the pencil next to client's name to update their file.

Entry/Exit - (Roberts, Norville) Save and Close Save Cancel

Overview - HUD-40118

Name	Entry Date	Exit Date	Reason Leaving	Destination
Roberts, Bertie	01/20/2008			
▶ Roberts, Norville	01/20/2008			
Roberts, Robert	01/20/2008			

Exit Data

Exit Date: 01/27/2008 02 : 03 PM

Reason for Leaving: Disagreement with rules/persons

If other, specify:

Destination: Don't know

If other, specify:

Tenure: Don't Know

Subsidy: None

Notes:

To update household members' exit data also, click on the box beside each name.

Roberts, Bertie

Roberts, Robert

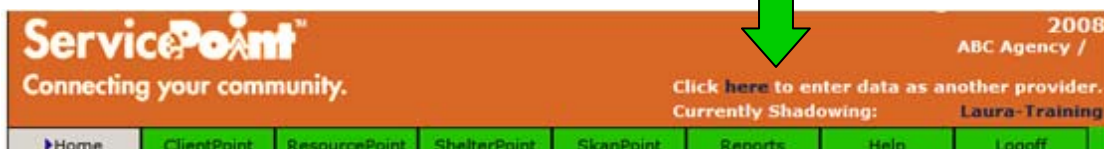
Edit Entry Data

Entry/Exit - (Roberts, Norville) Save and Close Save Cancel

Data Entry Tip: If client acquired a job, or received additional income while in your program, click on **Edit Entry Data** and record new information (see p. 14 for further instructions).

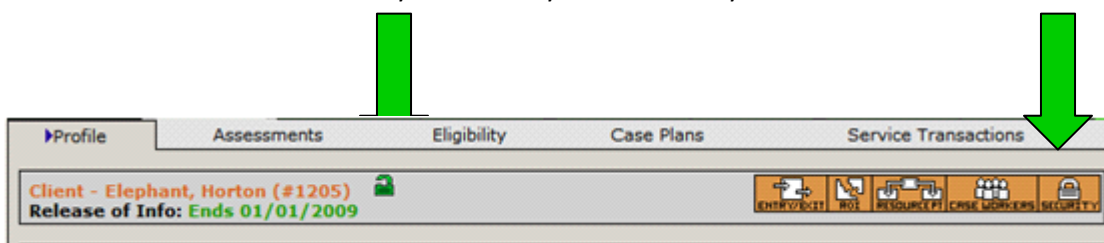
Don't do the following unless you have specific instructions from your Regional Coordinator:

- Don't click on **Click here to enter data as another provider.**



This could change how your data is both handled and seen in the system; it will also affect reports.

- Don't click on the locks or Security buttons anywhere in the system.



These buttons control how data is seen in the system and should only be used by CHIN System Administrators.