

ShelterPointTM

Data Entry Workflow

Shelterpoint

Always use Shelterpoint when entering and exiting clients into a project that has unit/bed inventory.

The screenshot shows a web browser window with two tabs titled "View Shelter Inventory - S...". The address bar displays the URL: <https://sp5.servicept.com/harfordcounty/com.bowmansystems.sp5.core.ServicePoint/index.html#shelterPointMain;1491313283526>. The page header features the SERVICEpoint logo with the tagline "Connecting Your Community." Below this, the user is logged in as "Harford County Government" with a date of "April 04, 2017". A purple navigation bar contains the text "ShelterPoint > View Shelter Inventory".

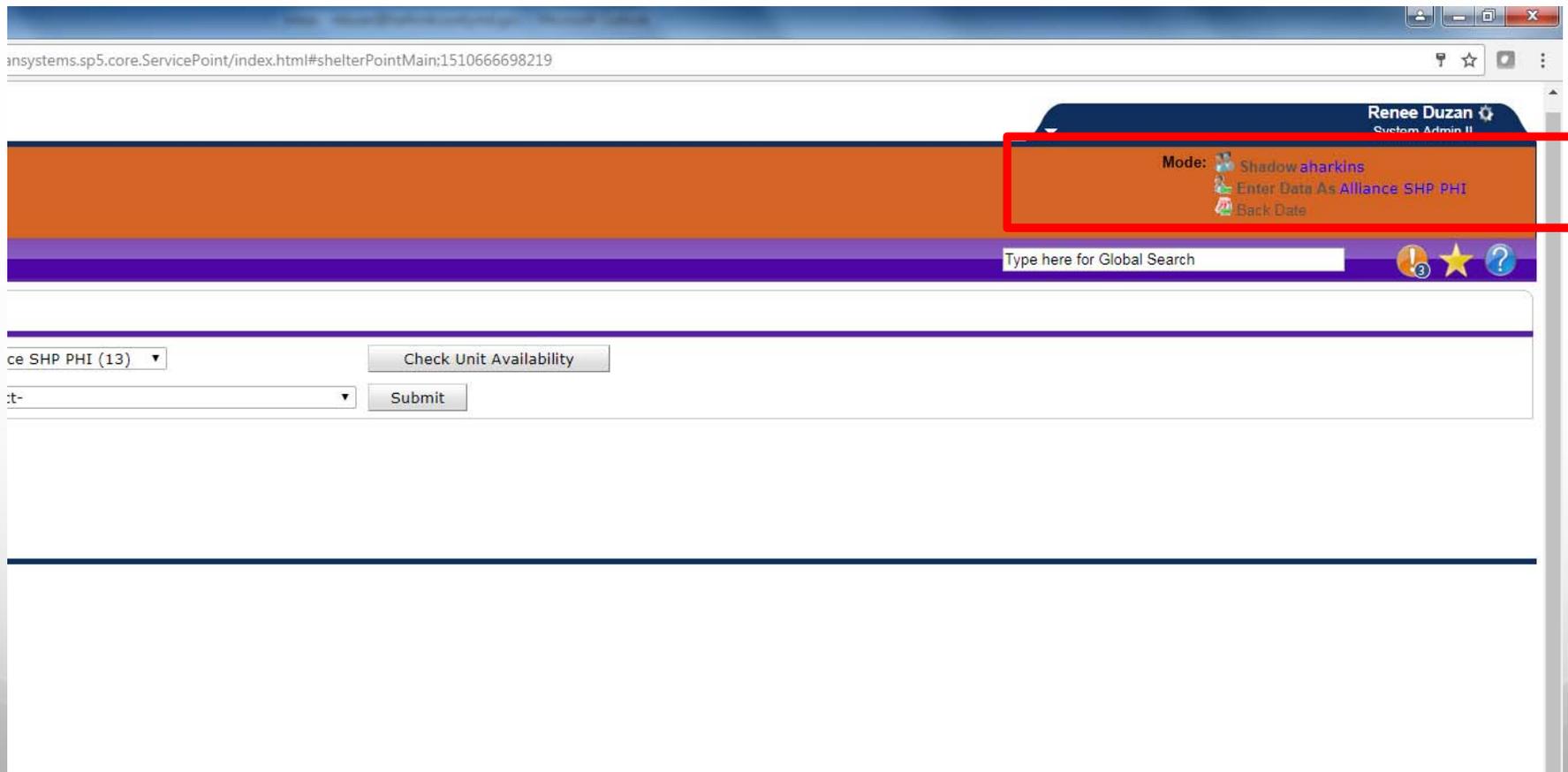
On the left side, there is a vertical menu with the following items: "Last Viewed", "Favorites", "Home", "ClientPoint", "ResourcePoint", "ShelterPoint" (highlighted with a red box), "ScanPoint", "Reports", "Admin", and "Logout".

The main content area is titled "View Shelter Inventory". It contains a form with the following fields and buttons:

- Provider ***: Harford County Government (1) [Search] [My Provider] [Clear] [Check Unit Availability]
- Unit List ***: -Select- [Submit]

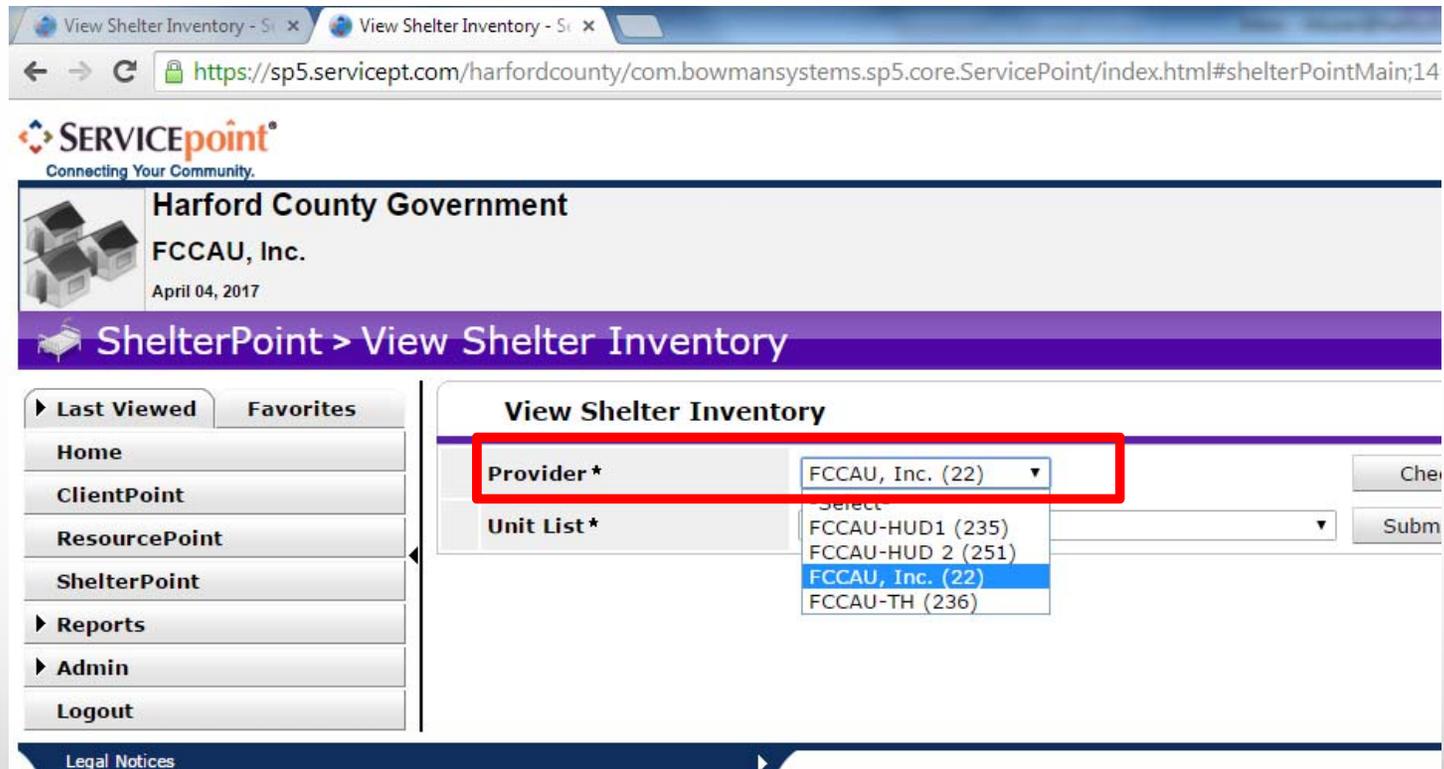
Shelterpoint

Use Enter Data As to choose the correct project to work out of



Shelterpoint

Using the drop down menu, choose the provider/project to enter client into.



The screenshot displays the ShelterPoint web application interface. The browser address bar shows the URL: <https://sp5.servicept.com/harfordcounty/com.bowmansystems.sp5.core.ServicePoint/index.html#shelterPointMain;14>. The page header includes the SERVICEpoint logo and the text "Connecting Your Community." Below this, the Harford County Government logo is shown, along with the text "FCCAUI, Inc." and the date "April 04, 2017". The main navigation bar features a purple background with the text "ShelterPoint > View Shelter Inventory".

The main content area is titled "View Shelter Inventory" and contains a form with the following fields:

- Provider ***: A dropdown menu with "FCCAUI, Inc. (22)" selected. This field is highlighted with a red box.
- Unit List ***: A dropdown menu with "FCCAUI-HUD1 (235)", "FCCAUI-HUD 2 (251)", "FCCAUI, Inc. (22)", and "FCCAUI-TH (236)" listed. The "FCCAUI, Inc. (22)" option is highlighted in blue.

Buttons for "Che" and "Subm" are visible to the right of the dropdown menus. A sidebar on the left contains navigation links: "Last Viewed", "Favorites", "Home", "ClientPoint", "ResourcePoint", "ShelterPoint", "Reports", "Admin", and "Logout". A "Legal Notices" link is located at the bottom of the sidebar.

Shelterpoint

Next, select the unit inventory

The screenshot shows a web browser window with two tabs titled 'View Shelter Inventory - St...'. The address bar displays the URL: <https://sp5.servicept.com/harfordcounty/com.bowmansystems.sp5.core.ServicePoint/index.html#shelterPointMain;1491313988>. The page header features the 'SERVICEpoint' logo with the tagline 'Connecting Your Community'. Below the logo, it identifies the user as 'Harford County Government' and 'FCCAU, Inc.', with a login date of 'April 04, 2017'. A purple navigation bar contains the text 'ShelterPoint > View Shelter Inventory'. On the left side, there is a sidebar menu with 'Last Viewed' and 'Favorites' tabs. The 'Last Viewed' tab is active, showing a list of links: Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, and Logout. The main content area is titled 'View Shelter Inventory' and contains a form. The 'Provider*' field is set to 'FCCAU, Inc. (22)'. The 'Unit List*' field is highlighted with a red rectangle and shows a dropdown menu with options: '-Select-', '-Select-', 'Dormitory - Men's Section', and 'Dormitory - Women's Section'. To the right of the form are two buttons: 'Check Unit Ava' and 'Submit'. At the bottom of the page, there is a 'Legal Notices' link.

Shelterpoint

Select “View All” to see empty beds in that unit

City Government
Government

View Shelter Inventory

View Shelter Inventory

Provider *	UB PSH I Chronic (281)	Search	My Provider	Clear	Check Unit Availability
Unit List *	104 Shamrock Rd. Bel Air, MD	Submit			
Type	Permanent Supportive Housing				

ShelterPoint Dashboard



Check Client In



Check In Referral



Hold ALL Empty Beds



Transmit Today's Check Out List



View All

Shelterpoint

The **Green** plus sign indicates an available bed.



The **Red** minus sign indicates the bed is filled.



Choose the **Green Plus** sign to “Check-In” a client to that bed.

View Shelter Inventory

View Shelter Inventory

Provider* UB PSH I Chronic (281) Search My Provider Clear Check Unit Availability

Unit List* 104 Shamrock Rd. Bel Air, MD Submit

Type Permanent Supportive Housing

Shelter Inventory Information

Unit List - 104 Shamrock Rd. Bel Air, MD

	Date In	Floor	Room	Bed	Hold	Client	Dis
		Floor 1	Room 1	Bed 001	Hold	EMPTY	
		Floor 1	Room 2	Bed 001	Hold	EMPTY	
		Floor 1	Room 3	Bed 001	Hold	EMPTY	
				Overflow (New)		EMPTY	

Print Unit List

▼ Outstanding Referrals - UB PSH I Chronic (281) - 0 total

Shelterpoint

Shelterpoint Client Search="The filing cabinet!"

Client Search

Client Search

Please Search the System before adding a New Client

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number	- - -			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-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**

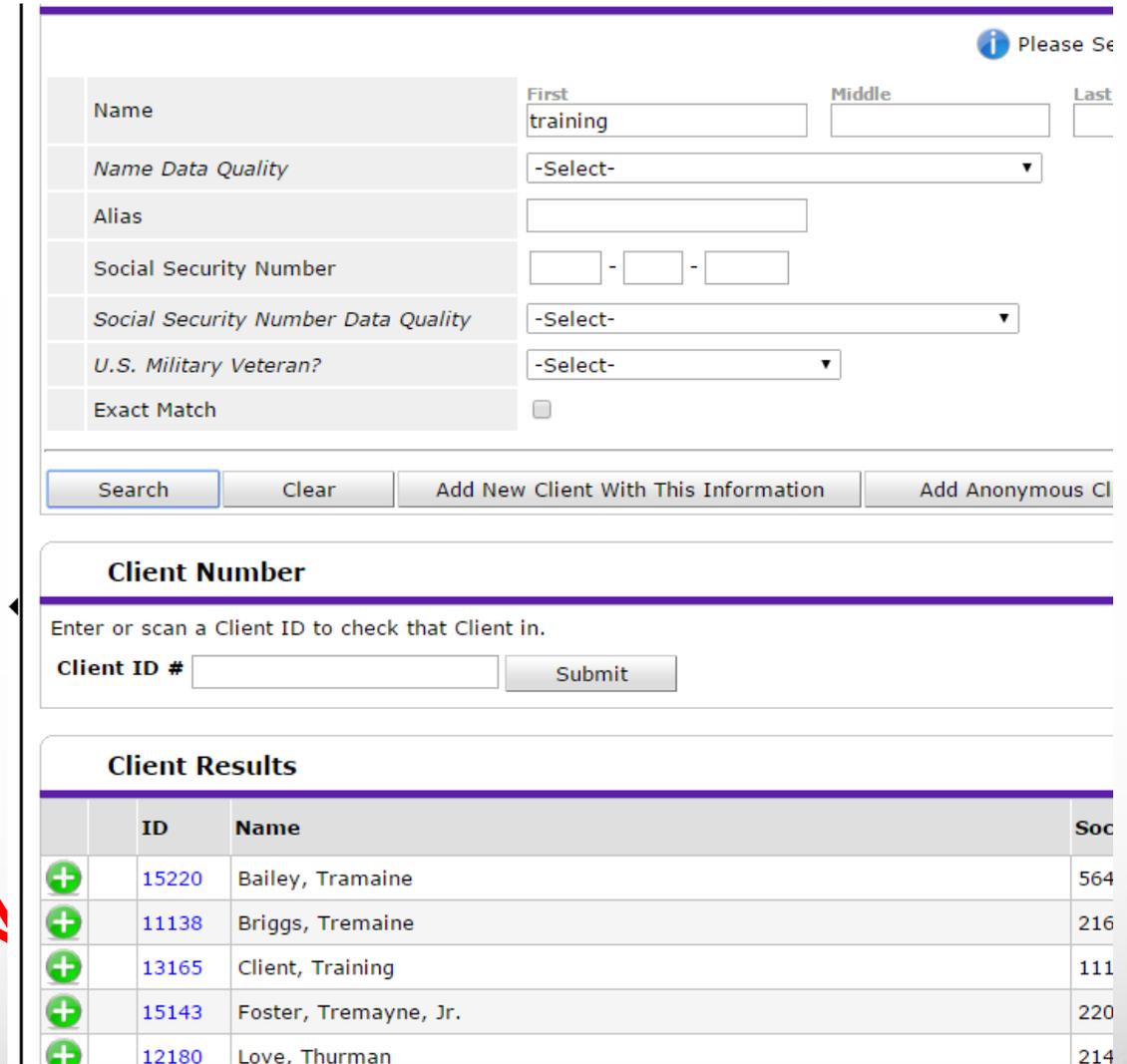
Search for existing clients, or
add clients

DO NOT add a new client unless
you have done both name and SSN
search.

Shelterpoint

If client is in the system, click on green Plus sign to select the client .

Go to Slide # 14, Shelterpoint -Entry



Name First Middle Last

Name Data Quality

Alias

Social Security Number - -

Social Security Number Data Quality

U.S. Military Veteran?

Exact Match

Client Number

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

Client ID #

Client Results

	ID	Name	Soc
<input data-bbox="829 1161 871 1193" type="button" value="+"/>	15220	Bailey, Tramaine	564
<input data-bbox="829 1209 871 1242" type="button" value="+"/>	11138	Briggs, Tremaine	216
<input data-bbox="829 1258 871 1291" type="button" value="+"/>	13165	Client, Training	111
<input data-bbox="829 1307 871 1339" type="button" value="+"/>	15143	Foster, Tremayne, Jr.	220
<input data-bbox="829 1356 871 1388" type="button" value="+"/>	12180	Love, Thurman	214

Shelterpoint

If client is not in the system, choose “Add New Client with This Information”

Client Search

Client Search

Please Search the System before adding a New Client.

Name	First Jerry	Middle	Last Seinfeld	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-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

Client Results

ID	Name	Social Security Number	Date of Birth	Alias
No matches.				

Shelterpoint

Create Relationships between records before entering clients into programs or providing services!

systems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:

Add Client ONLY

Add Client and Add NEW Household

Add Client and SEARCH Households

Cancel

First
Monty

Full Name

111 - 4

Full SSN Reported (HUD)

No (HUD)

For NEW Households with multiple members, choose **“Add Client and Add NEW Household”**

If adding a household with multiple members:

➤ Choose Household Type

➤ Continue entering family members

➤ You will see that household members are being added at the bottom

➤ When finished entering all family members, Click “Continue”

nansystems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Household Type

Household Type*

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number: - -

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

Client Number

or Scan a Client ID to add that Client to this Household.

Client ID #

Client Results

Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.						

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
23284	Python, Andrew	112-45-7896					0
23283	Python, Monty	111-45-2368					0

Showing 1-2 of 2

Shelterpoint-Household Relationships

- Designate 1 person as **Yes**, Head of Household
- Relationship to Head of Household = **Self**
NOTE: Only one member of the household grouping should be listed as the Head of Household. All other member relationships should be based on who was designated the Head of Household.

bowmansystems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Household Information - (6626) Male Single Parent

(6626) Male Single Parent

Save Save & Exit Exit

Household Type * Male Single Parent

Income US\$0.00 monthly (US\$0.00 annual)

Client Count 2

Household Members							
Name	Adp	Head of Household	Relationship to Head of Household	Joined Household *		Previous Associations	Household Count
(23284) Python, Andrew		Yes	Self	09	27 / 2016	0	1
(23283) Python, Monty		No	Son	09	27 / 2016	0	1

Add/Delete Household Members Household History Report

▶ Previous Household Members

Joined Household* = Date of Intake or Arrival into the program.

Shelterpoint

- When adding Single Adults, a Household does not need to be created.
- Choose “Add Client ONLY”

systems.sp5.core.ServicePoint/index.html#clientPointMain;1474987077692

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:

Add Client ONLY

Add Client and Add NEW Household

Add Client and SEARCH Households

Cancel

First: Monty

Full Name: []

111 - 4

Full SSN Reported (HUD): []

No (HUD)

Shelterpoint-Entry

1. Clear data using blue circle arrow and use calendar icon to select the Entry date

2. Choose the unit or bed

The screenshot displays the 'Unit Entry Data' form for Jerry Seinfeld (ID: 23296). The form includes the following sections:

- Unit Entry Data (23296) Seinfeld, Jerry**
 - Date In***: 04 / 04 / 2017. A red arrow points to the date field, and another red arrow points to the blue circular refresh icon next to it.
 - Unit Name / Number**: FCCAU, Inc. / Men's Section / Bed #07. A red arrow points to this field.
 - Supplies Given**: [Empty text box]
 - Locker number**: [Empty text box]
 - Codes/Notes**: [Empty text box]
- Incidents For (23296) Seinfeld, Jerry**
 - Table with columns: Start Date, End Date, Incident, Incident Code, Prov.
 - Buttons: Add New Incident
- Households Overview**
- Household Members**
 - Text: This Client is not a member of any Ho...
- Release of Information**
 - Release of Information: None
- Entry Data**
 - Provider***: FCCAU, Inc. (22) [Search]
 - Type***: HUD
- HUD CoC & ESG Entry SO ES SH (2016)**
 - Date of Birth***: [Empty date field]
 - Date of Birth Type***: -Select- [G]
 - Primary Race***: -Select- [G]
 - Secondary Race**: -Select- [G]

Shelterpoint-Entry

View ROI details and click “Add Release of Information”

The screenshot displays the Shelterpoint-Entry web application interface. The main content area is titled "Unit Entry Data - (23296) Seinfeld, Jerry". It includes a "Date In*" field set to 04/03/2017, a "Unit Name / Number" field with the value "FCCAU, Inc. / Men's Section /", and several empty input fields for "Supplies Given", "Locker number", and "Codes/Notes". To the right of these fields are buttons for "Midnight Check In", "Assign Unit", a user profile picture, and "Change" and "Clear" buttons.

A modal window titled "Release Of Information" is overlaid on the page. It contains a table with columns "Provider", "Permission", "Start Date", and "End Date". The table is currently empty, displaying "No matches." Below the table is an "Add Release of Information" button, which is highlighted by a red arrow pointing from the text above. An "Exit" button is located at the bottom right of the modal.

Below the modal, the "Incidents For (23296) Seinfeld, Jerry" section is visible, featuring a table with columns "Start Date", "End Date", and "Incident", and an "Add New Incident" button. Below this is a "Households Overview" section with a "Household Members" subsection. A message at the bottom of the household section states: "This Client is not a member of any Households."

The "Release of Information" section shows a "Release of Information" field with the value "None". A "View ROI Details" button is highlighted with a red box. Below this is the "Entry Data" section, which includes a "Provider*" field with the value "FCCAU, Inc. (22)" and a "Type*" field with the value "HUD". There are "Search", "My Provider", and "Clear" buttons next to the provider field.

The footer of the page is a yellow bar with the text "HUD CoC & ESG Entry SO ES SH (2016)" on the left and "Date: 04/03/2017 12:00:00 PM" on the right.

Shelterpoint-Release of Information

- Start date should = Entry date
- End date should be 1 year from the start date
- Save your information

The screenshot shows a web application window titled "Release Of Information" for a client named Jerry Seinfeld (ID: 23296). The form is divided into several sections:

- Household Members:** A message states, "This Client is not a member of any Households."
- Release of Information Data:** A table with the following fields:

Provider *	FCCAU, Inc. (22)	Search	My Provider	Clear
Release Granted *	Yes			
Start Date *	04 / 03 / 2017	[Calendar icons]		
End Date *	04 / 03 / 2018	[Calendar icons]		
Documentation	Signed Statement from Client			
Witness	<input type="text"/>			

At the bottom of the form, there are two buttons: "Save Release of Information" and "Cancel".

Shelterpoint-Assessment

Answer all questions on either the **HUD COC & ESG Entry SO ES SH (2016)** or the **HUD COC & ESG Entry All Other Projects (2016)** Assessment. These fields are important for reporting status at Entry.

- Answers may trigger other fields to pop up in HUD COC & ESG Entry All Other Projects (2016) Assessment. .
- Answer the additional questions that pop up.
- Fields that are **red** and have an ***** are required fields.

Select an Assessment

HUD UDEs for All other Projects (2016)

Annual Assessment (2016)

HUD CoC & ESG Entry All Other Projects (2016)

HUD

HUD CoC & ESG Update (2016)

Household Members

(23284) Python, Andrew
Age: Unknown
Veteran: No (HUD)

(23283) Python, Monty
Age: 48
Veteran: No (HUD)

Household Data Sharing

Client: (23283) Python, Monty

HUD CoC & ESG Entry All Other Projects (2016) Entry Date

Date of Birth *	06 / 20 / 1968
Date of Birth Type *	Full DOB Reported (HUD) G
Primary Race *	White (HUD) G
Secondary Race	-Select- G
Ethnicity *	Non-Hispanic/Non-Latino (HUD) G
Gender *	Male G
Relationship to Head of Household *	-Select-
Client Location *	-Select- G
Residence Prior to Project Entry *	-Select-

Shelterpoint-Assessment

There are additional Data Elements with pop up boxes that must be answered completely. The **red** triangle means something was missed.

- Answers in the pop up boxes should coincide with information related to this section i.e. If you answered "No" to income and put "0" amount in the field, then all boxes should be marked "No" in the additional pop up.

SH in the past three years

Total Monthly Income * G

Income from Any Source * G

Monthly Income

Monthly Amount	Source of Income	Start Date *	End Date
	VA Non-Service Connected Disability Pension (HUD)	04/03/2017	

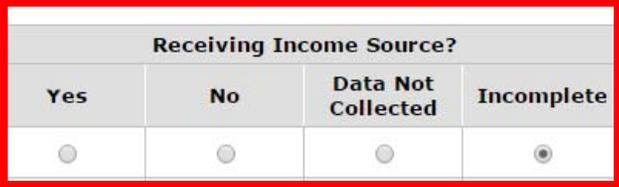
HUD Verification: Monthly Income for 04/03/2017

Per Source of Income, the current records for Monthly Income as of 04/03/2017 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 04/03/2017, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
<input type="text" value=""/> Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="text" value=""/> Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="text" value=""/> Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="text" value=""/> General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="text" value=""/> Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="text" value=""/> Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>



Shelterpoint-Assessment

- You know you have answered all of the questions when the **Red** triangle turns to a **Green** checkmark

Income from Any Source * No (HUD) G

Monthly Income HUD Verification

	Monthly Amount	Source of Income	Start Date *	End Date
 		VA Non-Service Connected Disability Pension (HUD)	04/03/2017	
 		Worker's Compensation (HUD)	04/03/2017	
 		VA Service Connected Disability Compensation (HUD)	04/03/2017	
 		Unemployment Insurance (HUD)	04/03/2017	
 		TANF (HUD)	04/03/2017	

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

Non-cash benefit from any source * No (HUD) G

Non-Cash Benefits HUD Verification

	Amount of Non-Cash Benefit	Source of Non-Cash Benefit	Start Date *	End Date
--	----------------------------	----------------------------	--------------	----------

Shelterpoint-Assessment

- Always Save or Save and Exit at the bottom of each screen.

Add Showing 1-5 of 8 First Previous Next Last

Domestic violence victim/survivor * No (HUD) G

If yes for Domestic violence victim/survivor, when experience occurred -Select- G

If yes for Domestic Violence Victim/Survivor, are you currently fleeing? -Select- G

 Outreach

Date of Contact	Location	Start Date *	End Date
Add			
Date of Engagement	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G	
Residential Move-in Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G	

Delete This Shelter Stay Jump to Profile

Save Save & Exit Exit

Shelterpoint-Service Transactions

“Service Transactions Tab”

Release of Information: March 4, 2011

Client Information

Service Transactions

Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services



Add Referrals



View Previous Service Transactions



View Entire Service History

Use the **Dashboard** to quickly add needs, services or referrals or to view the client's historical records.

Shelterpoint-Service Transactions

Review Historical Transactions!
Navigate **Back to Dashboard**

Client Training (+)

Release of Information: March 4, 2011

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

Previous Needs

Select Dates

Start Date

End Date

-Select-

/ /

/ /

Search

	Provider Creating	Need Status	Amount of Need
  	Professional Services Training Provider	Identified	
  	Professional Services Training Provider	In Progress	

Add Need

Showing 1-2 of 2

Back to Dashboard

Exit

Shelterpoint-Service Transactions

Client - (12973) Salud, Mariano 

(12973) Salud, Mariano
Release of Information: **None**

-Switch to Another Household Member- ▾

Client Information **Service Transactions**

Service Transaction Dashboard

 Add Need	 Add Service	 Add Multiple Services	 Add Referrals	 View Previous Service Transactions
 View Shelter Stays	 View Entire Service History			

Add Service Transactions Using “Add Multiple Services”

Shelterpoint-Service Transactions

Add multiple services quickly by automatically diagnosing the **Need** to be the same as the service.

▼ Household Members

Note: To include Household members in these Services, click the box beside each name. Only members from the SAME Household may be selected.

Household #1 Members: Partner, Training

Multiple Services

Note: 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 re-entered.

Provider* (1) Professional Services Training ▼

Service Start Date* 03 / 06 / 2010

Service End Date 03 / 06 / 2010

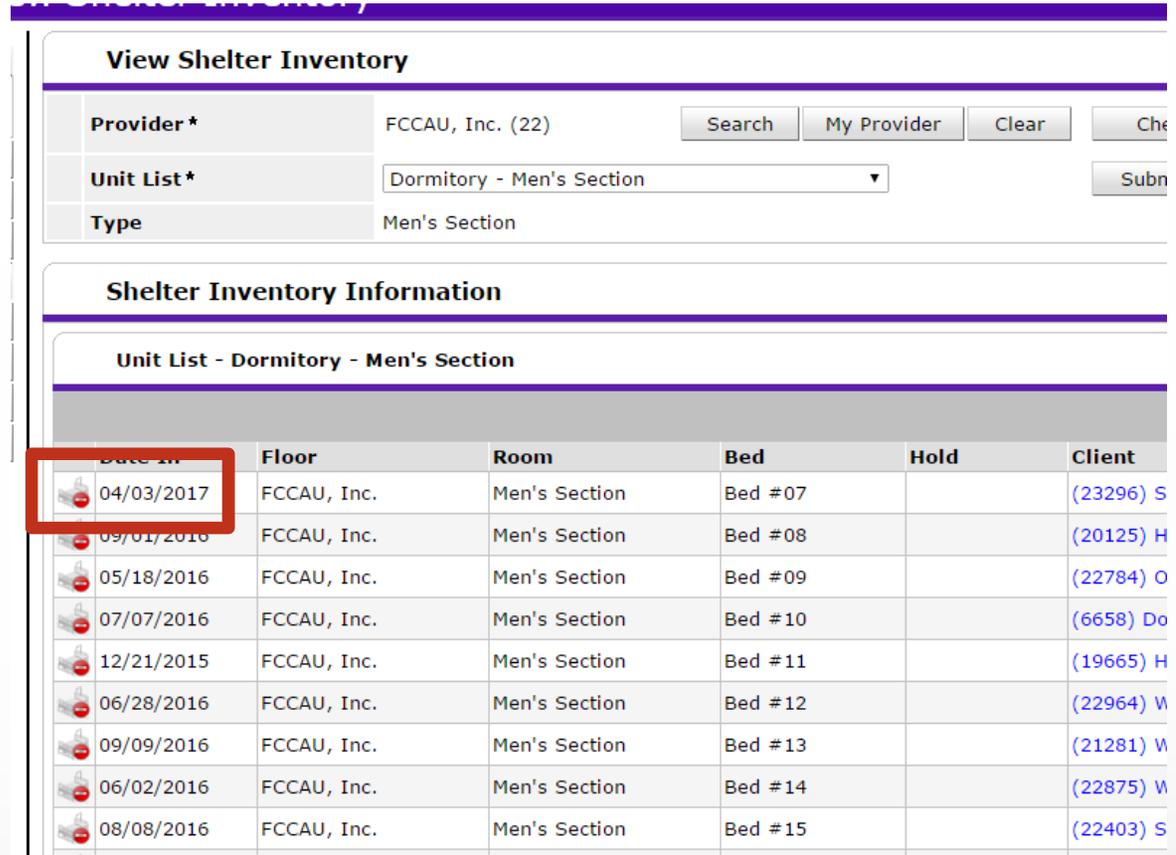
Service List

Number of Services Status -Select-

Number of Services *	<input type="text" value="1"/>
Service	(TP-3350.8000-130) Database Creation/Management Software Selection
Status *	-Select- ▼

Shelterpoint-Exit

- Go back to Shelterpoint and choose the client you want to exit.
- **Always** exit clients from Shelterpoint



View Shelter Inventory					
Provider *	FCCAUI, Inc. (22)	Search	My Provider	Clear	Che
Unit List *	Dormitory - Men's Section	Subn			
Type	Men's Section				
Shelter Inventory Information					
Unit List - Dormitory - Men's Section					
Date In	Floor	Room	Bed	Hold	Client
 04/03/2017	FCCAUI, Inc.	Men's Section	Bed #07		(23296) S
 09/01/2016	FCCAUI, Inc.	Men's Section	Bed #08		(20125) H
 05/18/2016	FCCAUI, Inc.	Men's Section	Bed #09		(22784) O
 07/07/2016	FCCAUI, Inc.	Men's Section	Bed #10		(6658) Do
 12/21/2015	FCCAUI, Inc.	Men's Section	Bed #11		(19665) H
 06/28/2016	FCCAUI, Inc.	Men's Section	Bed #12		(22964) W
 09/09/2016	FCCAUI, Inc.	Men's Section	Bed #13		(21281) W
 06/02/2016	FCCAUI, Inc.	Men's Section	Bed #14		(22875) W
 08/08/2016	FCCAUI, Inc.	Men's Section	Bed #15		(22403) S

Shelterpoint-Exit

- Clear data and select Exit date using the calendar.

Check Out

Unit Exit Data (2278) Shelterpoint, Inc.

Date Out* 04 / 03 / 2017 12 : 00 : 00 PM

Unit Name / Number Bed #09

Supplies Returned Yes No

Reason For Leaving* -Select-

Destination* -Select-

Apply Funds for Service

Funding Sources

Source

Household Members

This Client is not a member of any Households.

HUD CoC & ESG Exit (2016)

Total Monthly Income* 300 G

Income from Any Source* Yes (HUD) G

Monthly Income

	Monthly Amount	Source of Income	Start Date*
		Worker's Compensation (HUD)	05/18/2016
		VA Service Connected Disability Compensation (HUD)	05/18/2016
		VA Non-Service Connected Disability Pension (HUD)	05/18/2016
		Unemployment Insurance (HUD)	05/18/2016
		TANF (HUD)	05/18/2016

Shelterpoint-Exit

- You **must** choose a Reason for Leaving and a Destination.
- Make any changes in the Assessment area to reflect client status at exit.
- Save & Exit

Check Out

Unit Exit Data - (22784) Oldaker, Steve, Sr.

Date Out* 04 / 03 / 2017 12 : 00 : 00 PM

Unit Name / Number Bed #09

Supplies Returned Yes No

Reason For Leaving* -Select-

Destination* -Select-

Apply Funds for Service

Funding Sources

Source

Household Members

This Client is not a member of any Households.

HUD CoC & ESG Exit (2016)

Total Monthly Income* 300 G

Income from Any Source* Yes (HUD) G

Monthly Income

	Monthly Amount	Source of Income	Start Date*
		Worker's Compensation (HUD)	05/18/2016
		VA Service Connected Disability Compensation (HUD)	05/18/2016
		VA Non-Service Connected Disability Pension (HUD)	05/18/2016
		Unemployment Insurance (HUD)	05/18/2016
		TANF (HUD)	05/18/2016