



# ENDEAVORS – HENNEPIN RESPITE HMIS USER GUIDE

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## HMIS WORKFLOW OVERVIEW FOR ENDEAVORS RESPITE PROJECT

1. Healthcare for the Homeless (HCH) staff identify clients who are eligible and interest in the Respite program.
2. HCH staff determines if the client has an existing HMIS profile and Community Card.
  - a. If the client does not have an existing HMIS profile:
    - i. HCH staff will warm transfer the client to the Adult Shelter Connect (ASC).
    - ii. The ASC creates an initial profile and complete the ESG assessment.
    - iii. ASC transfers the client back to the HCH staff to complete the reservation process
3. HCH staff creates a reservation into the Endeavors Respite
4. Catholic Charities staff checks the client into the unit via Shelterpoint
  - a. If the client does not have a Community Card, one will be created for them when they arrive at Endeavors
5. HCH staff will follow-up with the client within 24 hours to complete an intake, including reviewing and updating the ESG Assessment
6. Upon exit, HCH staff will exit the client from the Respite provider and record an exit destination



## CLIENT BEGINS PROGRAM

1. Log into HMIS
2. EDA to Endeavors Respite provider (5400)

**Enter Data As Provider Search**

Mode: Shadow

- Enter Data As
- Back Date
- Connect To ART
- Connect To Olik

**Provider Search**

Search for Providers by using keywords from the Provider Name or Description.

Search  Show Advanced Options

Search Clear

**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID #  Submit

**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
			CCSPM-ES-HCC<><>Exodus Medical Respite (5400)													Level 4	Unknown	Minneapolis, MN 55402	05/11/2022								

**Time Rema**

- Past
- Past
- Past
- Past

## SEARCH FOR CLIENT RECORD

1. On the Client Point – Client Search screen,
  - a. Search for client up to 3 different ways
  - b. If a matching client is found that has **SHARED** in the Alias field, click on that client to open record. Continue to Create Bed Reservation
  - c. If no matches found, contact the Adult Shelter Connect to have a client record and initial assessment completed. Then continue to Create Bed Reservation.



**Client Search**

Please Search the System before adding a New Client.

Name	First Test	Middle	Last Client	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 number to go directly to that Client's profile.

Client ID #

**Client Results**

ID	Name ^	Social Security Number	Date of Birth	Alias
1029777	Client, CES Test			SHARED
837005	Client, New		10/15/1952	test client
1048377	Client, SNAP Test			
1094096	Client, Test Shelter	123-44-1234	01/01/1987	SHARED

## CREATE BED RESERVATION

1. Click on ShelterPoint to access the reservation system

- 
- 
- 
- 
- 
- 
- 
- 

2. Select **View All** from the dashboard
3. Confirm there are units available by reviewing the unit list and existing reservations.
4. If units are available, click **Add Reservation** in the "Reservations for Unit List" section toward the bottom of the screen

Reservations for Unit List - Endeavors Respite

Arrival Date	Name	Date of Birth	Gender	Group ID
<input type="button" value="Add Reservation"/> No matches.				

5. When the Client Search Pop-up appears, search for the client for whom you want to make a reservation, or you can enter their client ID from their Community Card if they have one.

**Client Search**

Please Search the System before adding a New Client.

Name	First Test	Middle	Last Client	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 number to select that Client.

Client ID # 1003157 Submit

- Review the incidents for the client and make sure they have not been banned from the site.
- Click **Save** to complete the reservation

## CHECK CLIENT IN TO ENDEAVORS

- Log into HMIS
- EDA to Endeavors Respite provider (5400)

Mode: Shadow

Enter Data As Provider Search

**Provider Search**

Search for Providers by using keywords from the Provider Name or Description.

Search  Show Advanced Options

Search Clear

**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID # 5400 Submit


**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All		
	Provider																									Level	Phone	Location	Last Updated
+	CCSPM-ES-HCC<><>Exodus Medical Respite (5400)																									Level 4	Unknown	Minneapolis, MN 55402	05/11/2022

- Click on ShelterPoint to access the reservation system

- ▶ Last Viewed
- ▶ Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint**
- SkamPoint
- ▶ Reports
- ▶ Admin
- Logout

4. Find the client's name in the Reservations for Unit List table and click on the green plus sign next to the arrival date to check in the client.

Reservations for Unit List - Test shelter		
	Arrival Date	Name
	06/30/2021	(1) Phoenix, The

- a. Read any pop-up alerts to determine whether any action needs to be taken. (For example, the client might have an active ban incident for your shelter.)
  - i. If there is a pop-up alert, decide whether to continue with the check-in or cancel it.

5. In the Unit Entry Data, make sure the check-in date is correct and you can assign a specific bed/unit to the client

Unit Entry Data - (1) Phoenix, The	
Date In *	12 / 01 / 2021   12 : 13 : 32 PM <input type="button" value="Midnight Check In"/>
Unit Name / Number	Overflow 

a. Assign unit and click **Select** to confirm

Assign Unit	
Our Saviour's	
Bed	OSH Shelter / OSH Shelter / Room 112
<input type="button" value="Select"/> <input type="button" value="Cancel"/>	

6. Add any additional information you wish to note

Supplies Given	<input type="text"/>
Locker number	<input type="text"/>
Codes/Notes	<input type="text"/>

7. Click **Save and Exit**



## CLIENT INTAKE AND ASSESSMENT

1. Log into HMIS
2. EDA to Endeavors Respite provider (5400)

Mode: Shadow

**Enter Data As Provider Search**

**Provider Search**

Search for Providers by using keywords from the Provider Name or Description.

Search

**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	CCSPM-ES-HCC<><>Exodus Medical Respite (5400)																										
	<b>Provider</b>	<b>Level</b>	<b>Phone</b>	<b>Location</b>	<b>Last Updated</b>																						
	CCSPM-ES-HCC<><>Exodus Medical Respite (5400)	Level 4	Unknown	Minneapolis, MN 55402	05/11/2022																						

3. Click on ShelterPoint

► Last Viewed    Favorites

Home

ClientPoint

ResourcePoint

**ShelterPoint**

SkamPoint

► Reports

► Admin

Logout

4. Click on the client's name to open their Entry Data

**Shelter Inventory Information**

Unit List - Endeavors Respite

Display: All Beds    Sort By: Program    Ascending   

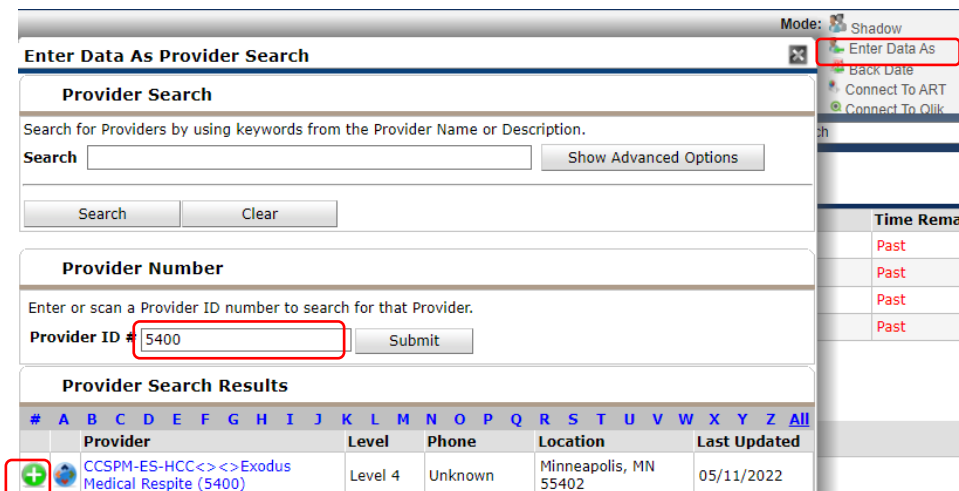
Date In	Program	Location	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
05/27/2022	Endeavors Respite ES	Endeavors	Unit 101		(1) Phoenix, The	01/01/1980	Female		No	

5. Review and update the **HUD: ESG Entry for ES and SO Assessment within the Stay Data tab**
  - a. Confirm all previously completed data is still correct. If not, update the fields
  - b. Section 3, Housing Situation, is most likely to have fields that need to be updated. However, Health Ins, Disability, Income, and Non-Cash Benefits may also warrant some extra attention as well.
  - c. Complete any fields where information is missing
  
6. Click **Save & Exit**

## EXITING THE CLIENT

WHEN A CLIENT WILL NO LONGER BE STAYING AT THE SHELTER, THEY SHOULD BE CHECKED OUT.

1. Log into HMIS
2. EDA to Endeavors Respite provider (5016)



3. Click on ShelterPoint
  - ▶ Last Viewed
  - ▶ Favorites
  - Home
  - ClientPoint
  - ResourcePoint
  - ShelterPoint**
  - SkansPoint
  - ▶ Reports
  - ▶ Admin
  - Logout
  
4. Open the unit list in **ShelterPoint**.
5. Find the name of the client and click on the **red circle** next to the **Date In**.

Date In	Program	Room	Bed	Hold	Client
08/01/2018	Men's Section	Room 112	112 1 Bottom		(460) Jim Bob, Jane
08/02/2018	Men's Section	Room 112	112 1 Top		(133) Car, Fast
11/08/2018	Men's Section	Room 112	112 2 Bottom		(254) Henry, Bruce

6. Set the **Date Out** as the morning they are leaving shelter.
7. Pick the most accurate answers from the **Reason for Leaving** and **Destination** drop-down menus.
8. Review the **HUD: CoC & ESG Exit** assessment and make updates where necessary.
9. Scroll down and click on **Save & Exit**.