HMIS DATA ENTRY GUIDE FOR
EXTENDED STAY EMERGENCY SHELTERS

Data entry instructions for checking single adults into and out of beds at extended stay emergency shelter programs in Hennepin County.

TABLE OF CONTENTS

Last Updated on 12/28/2021

BEFORE DOORS OPEN FOR THE NIGHT

Prepare for the night by checking for system alerts and making sure the bed lists are up-to-date.

1. Log into **Community Services**.

2. Check the **System News** section on your Home Page Dashboard for announcements about system downtime, new data standards, and other important updates.

System News (6)	Agency News (0)	
Date	**Headline**	
10/18/2021	Reminder: Do NOT use the 'Verify and Save Data' button!	
10/15/2021	CoC APR, ESG CAPER, and PATH reports have been updated.	

3. Click on **Enter Data As** and select the correct shelter provider from the pop-up menu.

4. Select **ShelterPoint** from the navigation menu on the left side of the screen.

5. Select the **View All** option from the ShelterPoint Dashboard.

6. Double check the bedlist. Make sure clients that have exited the shelter are checked out of the beds.

7. Select **Print Unit List**, then click on **Print**.

   a. Depending on your printer's setup, you may need to click through additional prompts to finish printing the unit list.

AFTER DOORS OPEN FOR THE NIGHT

Follow these steps for each client that comes to check into a bed.

Note: If the client arrives prior to 10:15pm without a reservation, direct them to visit/call the Adult Shelter Connect.

1. Ask the individual for their **Community Card**. If the client does not have their Community Card, ask them for another form of identification, such as a driver's license or state ID.

2. Look for the client's name on the unit list that you printed, then follow the proper set of instructions below, depending on whether they appear on your list.

CLIENT APPEARS ON THE UNIT LIST

1. Check the client's name off on the unit list.

2. Remind the client which bed they will be staying in.

3. Continue on to the next client.

CLIENT DOES NOT APPEAR ON THE UNIT LIST

1. 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.

2. 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.)

   a. If there is a pop-up alert, decide whether to **continue** with the check-in or **cancel** it.

3. In the **Unit Entry Data**, make sure the entry date is correct and you can assign a specific bed/unit to the client

4. Scroll through the **HUD: ESG Entry for SO and ES assessment** and make sure all the data is up to date. Make changes as needed. Click on **Save and Continue** to finish the check-in process.

   a. Make sure the **Client Location** field says MN-500 Hennepin.

5. Continue on to the next client.

CHECK-INS AFTER ASC CLOSES (AFTER 10:15PM)

These can be clients who are referred by 2-1-1, or just clients who arrive at your shelter without ASC reservations or 2-1-1 referrals. If clients have ASC reservations but arrive after 10:15pm, please refer to the section above for how to check in clients with ASC reservations.

CHECKING IN CLIENTS WITH 7-DIGIT AND SHARED HMIS PROFILES

Note: If your shelter doesn't have any open beds, ask the client to call 2-1-1 for other available shelter openings.

1. Find an open bed in the bed list. Click on the **green plus sign** *or* **Empty** to check in the client.

Date In	Floor	Location	Bed	Hold	Client
➕	First floor	Section 1	A	Hold	EMPTY

2. Scan the client's Community Card or enter the Client ID in the **Client ID #** field to pull up the client record.
   a. **IF** the client can't present a Community Card or knows their HMIS ID, type the client's information into the **Client Search** boxes, then click on **Search**.

      i. Repeat this step multiple times, using different combinations of information to search for the client, because client records often have incomplete information, it may be necessary to search with only a few boxes filled out.

	First	Middle	Last
Name	Belladonna		Took
Name Data Quality	Partial, Street Name, or Code Name Reported ⌄		
Alias	SHARED		
Social Security Number	☐ - ☐ - ☐		
Social Security Number Data Quality	Client refused (HUD) ⌄		
U.S. Military Veteran?	Client refused (HUD) ⌄		

      ii. Locate the correct client record in the search results and click on the **green plus sign** next to their Client ID

Client Results

ID	Name
➕ 1029807	10, CNC Test

3. 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.)
   a. If there is a pop-up alert, decide whether to **continue** with the check-in or **cancel** it.

    b. If the client is checking-in after midnight, click the **Midnight Check In** button.

4. Scroll to the bottom and click **Save & Exit**.

5. Inform the client they will need to go to the Adult Shelter Connect in the morning if they would like to make a reservation for the next night.

CHECKING IN CLIENTS WITHOUT HMIS PROFILES

If the client does not have an HMIS record, one will need to be created for them. The first step is to discuss the **HMIS Release of Information** with the client: The HMIS ROI asks whether the client will consent to share their information with other service providers. When an agency is able to access a client's shared information, the client is saved from having to answer the same questions over and over again.

1. Find an open bed in the bed list. Click on the **green plus sign** or **Empty** to check in the client.

	Date In	Floor	Location	Bed	Hold	Client
		First floor	Section 1	A	Hold	EMPTY

2. If the client checks the **SHARE** box on the ROI:

    a. Type the client's information into the **Client Search** boxes. It is important to fill out these boxes as completely as possible.

    b. Type the word **SHARED** into the **Alias** field, since this client has agreed to statewide data sharing.

    c. Click on **Add New Client With This Information**, then select **Ok** in the confirmation pop-up to continue with creating the record.

    d. Select the client by clicking on the **green plus sign** next to their name in the **Client Results** section. When you are alerted that this is the client's initial check-in, click on **Continue**.

Client Results

	ID	Name
⊕	1029807	10, CNC Test

    e. On the next screen, fill out the **HUD: ESG Entry for SO and ES assessment** as completely as possible. When you are finished, click on **Save & Exit**.

    f. **Note**: Inform the client they will need to go to the Adult Shelter Connect in the morning if they would like to make a reservation for the next night.

3. If the client checks the **DO NOT SHARE** box on the ROI:

    a. Inform the client that they will not be able to reserve shelter beds and instead will need to call 2-1-1 each night to find an available bed.

b. Select **ClientPoint** from the navigation menu on the left side of the screen.

c. Type the client's information into the **Client Search** boxes. It is important to fill out these boxes as completely as possible.

d. Click on **Search**. Make sure that a record with matching information does not appear in the search results.

e. Click on **Add New Client With This Information**, then select **Ok** in the confirmation pop-up to continue with creating the record.

f. When prompted by the **Back Date Mode** pop-up, select **Use Current System Date**.

g. Write **DO NOT SHARE** in the **Alias** field.

h. Email the **Helpdesk** right away at mnhmis@icalliances.org with the **Client ID** and ask to remove the statewide data sharing.

    i. The Helpdesk will respond on the next business day

4. Open your shelter's unit list in **ShelterPoint**.

    a. Pick an open bed in the unit list for the client and click on the word "**EMPTY**".

    b. Enter the client's ID number and click on **Submit**. When you are alerted that this is the client's initial check-in, click on **Continue**.

        i. If it is after midnight, click on **Midnight Check In**.

    c. Fill out the **HUD: ESG Entry for SO and ES assessment** as completely as possible. When you are finished, click on **Save & Exit**.

END OF CHECK-IN TIME

Once all clients with reservations have checked-in, any unfulfilled reservations should be cancelled.

1. Open your shelter's unit list in **ShelterPoint**.

2. Scroll down to the **Reservations for Unit List** section.

3. For each client that did not claim their reservation, click on **Cancel Reservation**, then select **No Show** and click on **Save**.

AT CLIENT MOVE-OUT

When a client will no longer be staying at the shelter, they should be checked out.

1. Open your shelter's unit list in **ShelterPoint**.

2. Find the name of the client and click on the **red circle** next to the **Date In**.

Date In	Program	Room	Bed	Hold	Client
⟵018	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
11/20/2010	Man's Continu	Room 112	112 2 Bottom		(254) Hanny Days

3. Set the **Date Out** as the morning they are leaving shelter.

4. Pick the most accurate answers from the **Reason for Leaving** and **Destination** drop-down menus.

5. Review the **HUD: CoC & ESG Exit** assessment and make updates where necessary.

6. Scroll down and click on **Save & Exit**.

APPENDIX A: POP-UP ALERTS

When a client is checked into a bed, a pop-up alert may appear. It is important to review these alerts because they may contain information that impacts the client's stay.
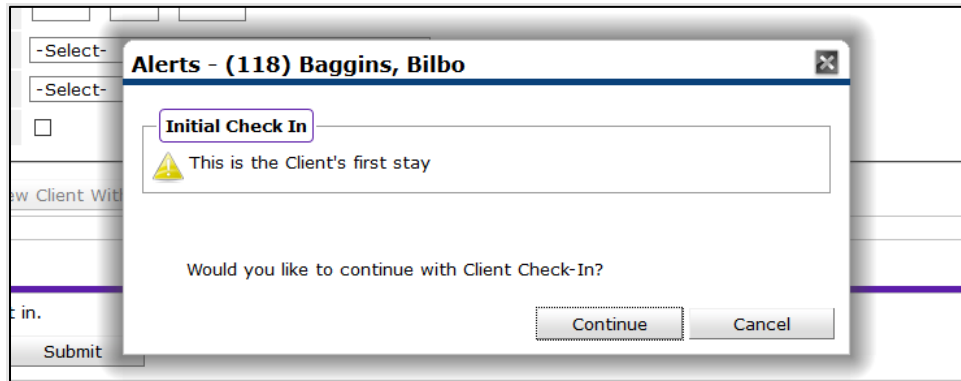
INITIAL CHECK-IN

What does this mean?

This is the first time a particular client record has been checked into your shelter's unit list. Though this alert often indicates that a client has never stayed at your shelter before, if an individual has multiple client records in HMIS, they may have checked-in previously using one of those other records.

What do you need to do?

Confirm that you have selected the correct client record. If the right record has been chosen, complete your shelter's intake process with the client; this can happen after the initial rush of check-in, but ideally before the individual leaves the next morning. One key part of intake is completing entry assessment required by your funder, which is often the *HUD: ESG Entry for ES and SO* assessment.

TIME BETWEEN STAYS

What does it mean?

The client record has not been checked into your bed list within the last 14 days.

What do you need to do?

Complete your shelter's intake process with the client; this can happen after the initial rush of check-in, but ideally before the individual leaves the next morning. Since the client has stayed at your shelter in the past, you will be updating their existing assessment information.

INCIDENTS

When should you create an incident?

Incidents are used to document things that should be shared with other agencies or should appear as a pop-up when a client is checking into shelter. Examples include upcoming doctor's appointments, pending

referrals for housing, or a negative interaction staff had with a client. Notes about a client can also be entered into the **Client Notes** section on the **Client Profile** tab.

		Provider	Note Date	Note Preview	Full Note
✏️	🗑️	Our Saviour-ES-HCC-HUD-ESG-DHS OEO- Shelter	12/05/2018	Client obtained employment.	📓

Add New Client Note   **Print**   **Showing 1-1 of 1**

When should an incident include a "ban"?

To determine whether an incident qualifies as a "ban" event, consider the following:

1. If you create the ban, the client will not be able to check into your shelter.

2. Is the client restricted or trespassed from your shelter? This requires a ban in the incident.

3. Are you trying to document a situation where a client was disrespectful or violated a rule, but you do not want to kick them out of the shelter? In this case, <u>do not</u> include a ban in the incident.

INCIDENT ALERT: BAN INCIDENTS FOR CHECK IN PROVIDER

What does it mean?

The client has been banned from staying at your shelter, either temporarily or indefinitely.

What do you need to do?

Check the pop-up to confirm which shelter the client is banned from and to see notes about the incident. Explain to the client why they are not allowed to stay at the shelter and follow any of your agency's protocols involving banned clients.

Rare Occasions

1. Shelter Staff: If the incident does not appear to be accurate or you have reason to believe the ban should be be lifted, contact your shelter manager.

2. Shelter Managers: If you need to remove a ban from an incident, follow the instructions below:

    a. Select **ClientPoint** from the navigation menu.

    b. Ask the client to scan their **Community Card**.

    c. Locate the **Incidents** section at the bottom of the **Summary** tab.

    d. Click on the **edit pencil** next to the incident that you would like to update.

    e. Change the **Ban** answer from **Yes** to **No**, then click on **Save**.

INCIDENT ALERT: BAN INCIDENTS FOR OTHER PROVIDERS

What does it mean?

The client has been banned from staying at another agency's shelter or a different shelter within your own agency. However, they can still be checked into a bed at your shelter.
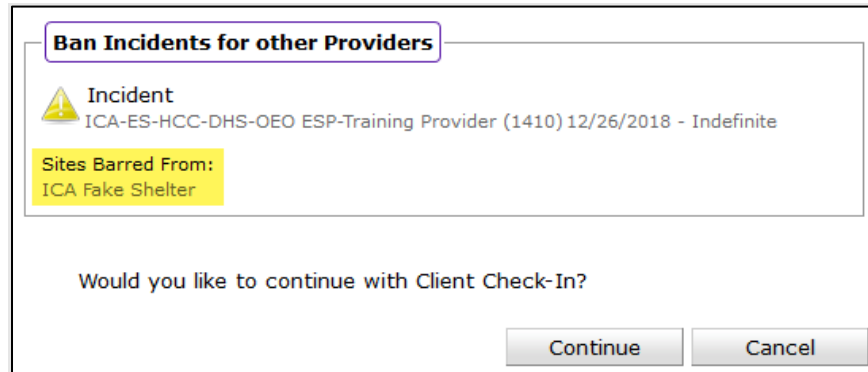
What do you need to do?

Since only a single HMIS provider can be attached to a ban incident, you will want to read the pop-up alert carefully to make sure that the client was not barred from staying at your shelter as well.

1. If the incident does not involve your provider, select **Continue** and proceed with check-in.

2. If the incident <u>does</u> involve your provider, cancel the check-in process. Explain to the client why they are not allowed to stay at the shelter and follow any of your agency's protocols involving banned clients.

INCIDENT ALERT: INCIDENTS FOR CHECK IN PROVIDER

What does it mean?

A staff person at your shelter documented an incident involving the client and the incident's end date has not yet been reached.

What do you need to do?

This incident provides you with information that may or may not require additional action: for example, the alert may ask you to remind the client of an upcoming doctor's appointment. Review the pop-up, take any necessary action, then click on **Continue** and proceed with check-in.

INCIDENT ALERT: INCIDENTS FOR OTHER PROVIDERS

What does it mean?

A staff person at another shelter documented an incident involving the client and the incident's end date has not yet been reached.

What do you need to do?

This incident provides you with information that may or may not require additional action: for example, the alert may ask you to remind the client of an upcoming doctor's appointment. Review the pop-up, take any necessary action, then click on **Continue** and proceed with check-in.

CREATE AN INCIDENT

Follow the instructions below to create a new incident. You should never edit another provider's incident or delete an incident unless it was created in the wrong client's record.

1. Open your shelter's unit list in **ShelterPoint**.

2. Find the client's name in the unit list and click on it.

3. Select **Add New Incident**, then fill out the following fields:

    a. **Provider**: Select your shelter provider.

    b. **Start Date**: Enter today's date.

    c. **End Date**: If this is not a ban incident, enter today's date; if it is a ban incident, enter the date they are allowed back in the shelter <u>minus</u> one day.

    d. **Incident**: Choose the most accurate option.

    e. **Ban**: Select Yes or No. (Click here to review the criteria for creating ban incidents.)

    f. **Staff Person**: Enter your name.

    g. **Sites Barred From**: If this is a ban incident, type <u>the full name of your shelter</u>.

    h. **Notes**: Explain what happened. Add your initials at the end.

4. When all fields have been filled out, click on **Save**.

Incident

Add a New Incident - (1026629) Client8=9, Test

Provider*	Institute for Community Alliances (ICA) - (no data entry) (1)	Search	My Provider	Clear
Start Date*	12 / 09 / 2021			
End Date	01 / 01 / 2021			
Incident	Disrespectful Behavior ∨			
Incident Code	-Select- ∨			
Ban	● Yes ○ No			
Staff Person	Ben Affleck			
Sites Barred From	ICA Emergency Shelter			
Notes	The client is banned from the ICA Emergency Shelter for a month following an incident. - B.A.			

Save   Cancel

This sample ban incident will prevent client 1026629 from checking into provider 1's shelter from 12/09/2021 to 01/01/2022.