


# HMIS DATA ENTRY GUIDE FOR DAILY DATA ENTRIES AT HCC NIGHT-BY-NIGHT EMERGENCY SHELTERS

Data Entry Instructions for checking single adult clients into and out of beds and recording entry/exits for new clients that haven't stayed at the shelter in the past 7 days. Run the ESG-CAPER report and compare it with the unit list to identify currently checked in clients without an active entry/exit.

## 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 (4)		Agency News (0) 
Date	Headline	
08/11/2022	<a href="#">ART Has Retired 🗑️ Click Here for Information About Its Replacement, BusinessObjects</a>	
12/28/2021	<a href="#">Reminder: Do NOT use the 'Verify and Save Data' button!</a>	

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 your specific project from the [Provider](#) drop-down menu.
6. Select the [View All](#) option from the [ShelterPoint](#) Dashboard.
7. Double check the bedlist. Make sure clients that have exited the shelter are checked out of the beds.
8. Print the Reservation List from the [ShelterPoint](#) screen

## AFTER DOORS OPEN FOR THE NIGHT


1. Check in client from the reservation list in **ShelterPoint**

Reservations for Unit List - Test shelter		
	Arrival Date	Name
	08/22/2022	(1029809) 20, CNC Test


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.

**Alerts - (200)**

**Initial Check In**

 This is the Client's first stay





**Ban Incidents for other Providers**

 Incident - Violent Behavior  
Our Saviour-ES-HCC-HUD-ESG-DHS OEO- Shelter (197) 09/20/2018 - 01/19/2019




Sites Barred From:  
Our Saviour's Shelter

Notes:  
 pulled a knife on while looking for food. KP

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

<b>Date In *</b>	08 / 22 / 2022				3	: 19	: 35	PM	<b>Midnight Check In</b>
Unit Name / Number	Overflow								 <b>Assign Unit</b>

★ **Note:** if the client is checking in after midnight, click on **Midnight Check In** so the time and date are correctly updated.

<b>Date In *</b>	08 / 22 / 2022				11	: 59	: 59	PM	<b>Midnight Check In</b>
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4. Click on **Save and Continue** to finish the check-in process.
5. Check in the rest of the clients following the above steps.

## END OF REGULAR CHECK-IN TIME

1. Count unoccupied beds and clear the reservation list of no-shows. Contact ASC to make additional reservations.
2. Repeat the steps above for checking in the late arrival guests.

## 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](#).

## AFTER CHECK-IN TIME

Run the ESG-CAPER report and compare it with the unit list to identify currently checked in clients without an active entry/exit.

1. Log into [Community Services](#).
2. ★ Click on [Enter Data As](#) and select the correct shelter provider from the pop-up menu.
3. Select [Reports](#) from the navigation menu on the left side of the screen.
4. Select the [ESG CAPER](#) report
5. Fill out the reporting prompt as shown below (also see screenshot below):
  - a. [Name](#) is optional. Add a name for easy identification.
  - b. For [Provider Type](#), choose 'Provider'
  - c. For [Provider](#), the field should automatically show the provider that you currently are in EDA mode to (Don't forget to EDA!)
  - d. For [Program Date Range](#), set it to a 'single day' (start date matches the end date i.e. 10/1-10/1)  
**Note:** the date should be "Today's date." For example, clients are checked in on 10/1, but you are running this report after midnight on 10/2, still run it for 10/1-10/1.
  - e. For [Entry/Exit Types](#), select 'HUD'
  - f. Then click on [Build Report](#) to run the report

### Report Options

Name

Description

Provider Type  Provider  Reporting\_Group

Provider \* TSA HLC-ES-HCC-HUD  
ESG/ESG-CV-Mpls-Safe Bay (1943)

This provider AND its subordin  This provider ONLY

Program Date Range 08 / 29 / 2022 to 08 / 29 / 2022

Entry/Exit Types \*  B  HUD  PATH  RHY  VA  HPRP (Retired)

6. When the **ESG CAPER** report finishes, you can find it at the top of the screen

Report Run History							
Report ID	Date Ran (Run-time)	Report Type	Name	User Creating	Running Provider	Running User	Report Status
193222	08/30/2022 03:22:27 PM (0.06 mins)	EsgCaper		Selina Sun	Institute for Community Alliances (ICA)	Selina Sun	Completed

7. When the Report Status says **Completed**, click on the Magnifying Glass to load the report.

8. Scroll down to **Total Number of Persons Served** in the **5a – Report Validation Table**. Click on the number to the right to view the client list – this is the list of clients with open entry/exits.

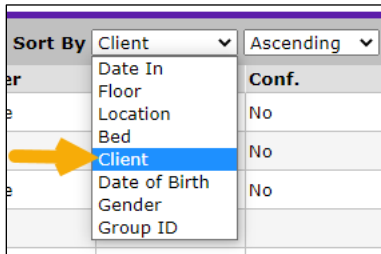
5a - Report Validation Table	
Report Validation Table	
1. Total Number of Persons Served	96

9. Click on **Download Results** to download the list of clients. In the pop-up window, click on **Download** again to proceed

1146274	
1092927	
1180835	
1188706	
Showing 1-20 of 96	
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>	
<input type="button" value="Download Results"/>	<input type="button" value="Exit"/>

10. Open the Excel file in the downloaded zip folder. Print the list. Write the report date on the printout.

- Go to your shelter's unit list in [ShelterPoint](#). Sort the client list by Name.



Click on [Print Unit List](#) at the bottom of the unit list, then click on [Print](#) again in the pop-up window to proceed.

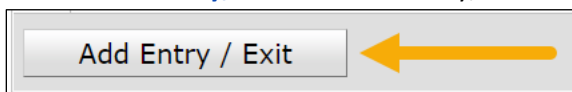
- Compare the printed [ESG CAPER](#) report and the printed unit list and circle the clients on the unit list printout that aren't on the [ESG CAPER](#) report. These are the clients that will need to have entry/exits added.
- Return to the unit list in ShelterPoint, find the clients that you just circled on the unit list printout and click on their name.



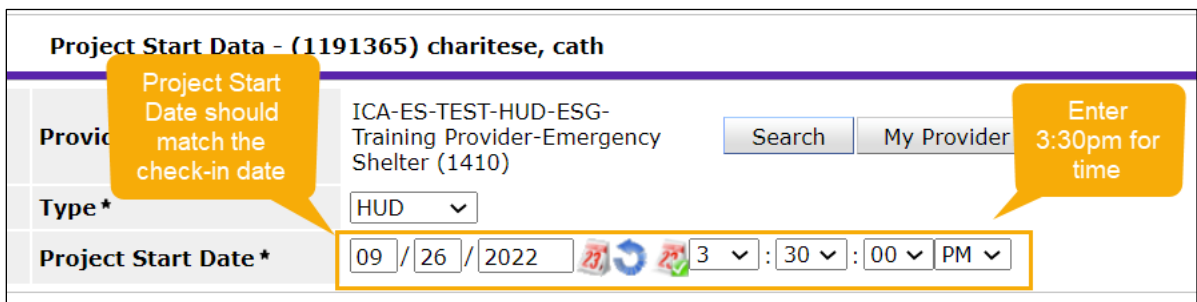
- In the pop-up window, click on the [Entry/Exit Tab](#)



- Click on [Add Entry/Exit](#) to add an entry/exit.



- Make sure the Entry Date matches the date of the client's first stay. If 9/26/2022 is the first day that the client is staying with your shelter, the Project Start Date should also be 9/26/2022. The time needs to be *at or before* the check-in time. Enter 3:30pm for the Project Start Time for all clients.



**Note:** if you are adding entry/exits after midnight, the entry date will automatically show the real-time date. Make sure to update the date so it matches the first day the client is checked into the shelter. For example, you are adding entry/exits at 2am on 9/27 for clients that checked on the evening of the 9/26. Double check and make sure the 'Project Start Date' says 9/26, not the actual time and date you are doing the data entry.





b. Click on **Save and Continue** to continue to the entry assessment


16. Scroll through the **HUD: ESG Entry for SO and ES assessment** and make sure all the data is up to date. Pay attention particularly to the two data elements below.

a. Make sure that the **Relationship to Head of Household** field says 'Self (Head of Household'

**Relationship to Head of Household \***

b. If the **Date of Birth** is already filled out, make sure the **Date of Birth Type** says 'Full DOB Reported'




Date of Birth     

Date of Birth Type 

c. Make sure the **Client Location** field at the bottom of the assessment says 'MN-500 Hennepin'.

Client Location   

d. Click on **Save and Exit**. The entry/exit you just added should be showing up at the top of the Entry/Exit list.

Entry / Exit				
Program	Type	Project Start Date	Exit Date	
 ICA-ES-TEST-HUD-ESG-Training Provider-Emergency Shelter (1410)	HUD	 09/26/2022		

Showing 1-1 of 1

17. Repeat steps 13-16 for every client checked in today that isn't on the **ESG CAPER** report