

HENNEPIN OVERFLOW PROJECTS

FAMILY SHELTER DATA ENTRY WORKFLOW

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BEFORE YOU START

1. Make sure that the clients you will be entering have been created in HMIS. If not, please use this resource to [Create or Find Record of Presenting Client](#).
2. Make sure that the clients are in a household, and that one is designated as Head of Household. If not, please use this resource to [Create a Household](#).
3. Have the client’s name or ID number, and the room they will be staying in, at the ready.
4. Click on **Enter Data As** in the upper right-hand corner and select the correct provider.
5. If the client is not moving in today, start by clicking on the **Back Date** button also in the upper right -hand corner and put in the date the client entered your program.

ENTER A HOUSEHOLD (NO REFERRAL)

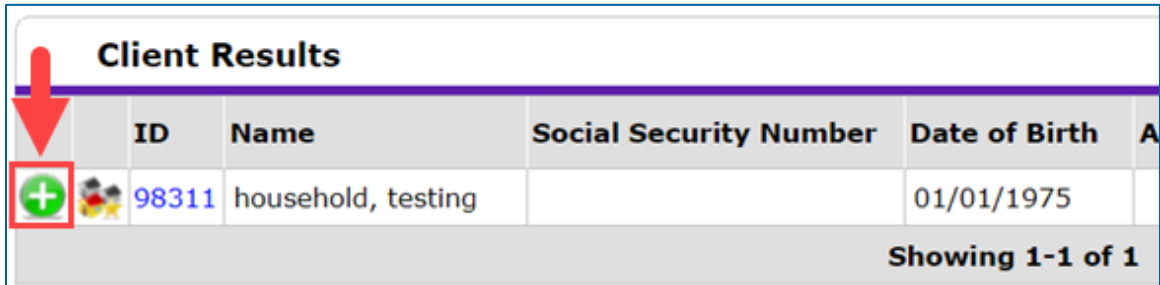
1. In the menu on the left-hand side of Community Services, click on the **Shelters** module.
2. If there are multiple options, select the **Provider** and **Unit List** you will be entering the clients into. Then, click **Submit**.

View Shelter Inventory	
Provider *	Hennepin-ES-HCC<>>Family Overflow 2 FP (6777)
Unit List *	-Select-
<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> <input type="button" value="Check Unit Availability"/>	
<input type="button" value="Submit"/>	

3. On the resulting Shelters Dashboard, click on the button to **View All**, which will bring you to the **Unit List**.



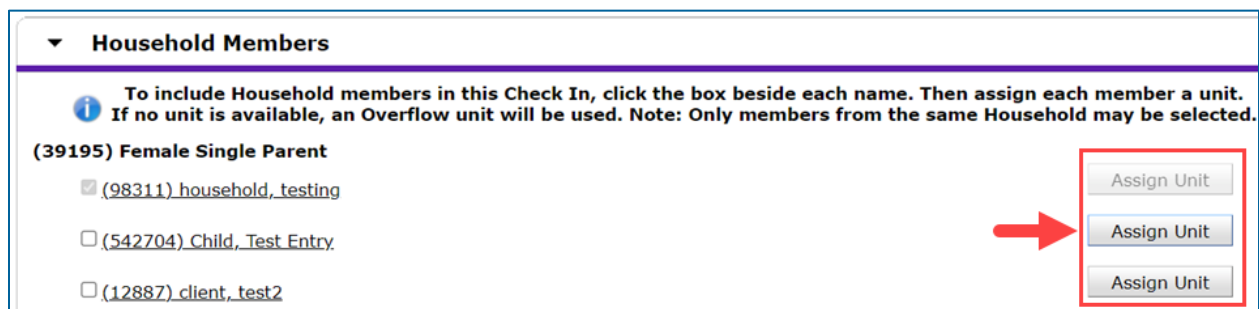
- Find the correct bed for the client and click on the green icon on the left-hand side of the row.
- Search for the client or enter the Client ID. When the client comes up in the **Client Results**, click the green plus sign next to their name, to go to the **Unit Entry Data** page.



Client Results					
	ID	Name	Social Security Number	Date of Birth	A
	98311	household, testing		01/01/1975	

Showing 1-1 of 1

- You should now be on the **Unit Entry Data** page. Under **Household Members**, click **Assign Unit** for each of the other members of the household.



Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(39195) Female Single Parent

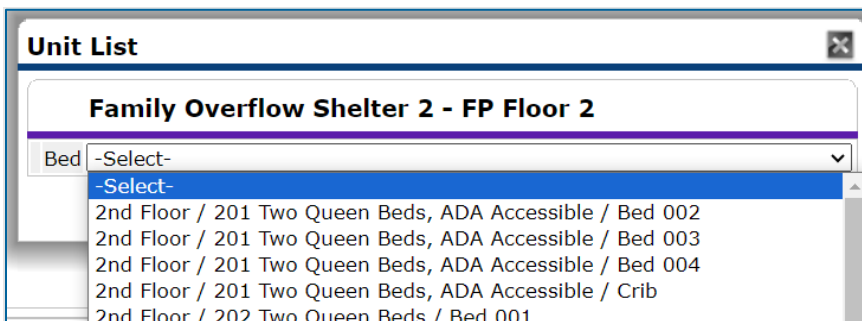
- (98311) household, testing
- (542704) Child, Test Entry
- (12887) client, test2

Assign Unit

Assign Unit

Assign Unit

- Select the appropriate unit for each client in the household using the resultant drop-down menu.



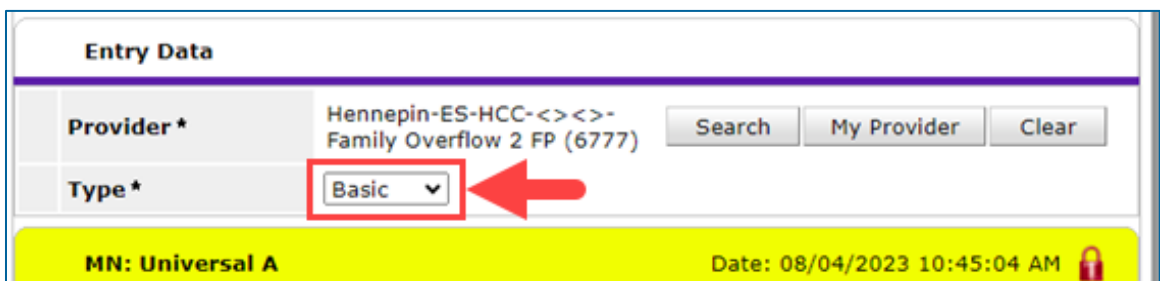
Unit List

Family Overflow Shelter 2 - FP Floor 2

Bed: -Select-

- Select-
- 2nd Floor / 201 Two Queen Beds, ADA Accessible / Bed 002
- 2nd Floor / 201 Two Queen Beds, ADA Accessible / Bed 003
- 2nd Floor / 201 Two Queen Beds, ADA Accessible / Bed 004
- 2nd Floor / 201 Two Queen Beds, ADA Accessible / Crib
- 2nd Floor / 202 Two Queen Beds / Bed 001

- Scroll down to the **Entry Data** section and select “Basic” as the **Entry Type**.



Entry Data

Provider * Hennepin-ES-HCC-<><>- Family Overflow 2 FP (6777) Search My Provider Clear

Type * Basic

MN: Universal A Date: 08/04/2023 10:45:04 AM

9. Fill out the entry assessment as much as possible. Be sure to confirm relationships with the head of household.
10. Click **Save and Exit**. This will take you back to the **Shelter Inventory** page.
11. Find the next client in the household who is staying with the Head of Household. Click on their name, under the **Client** column. This will bring you to their entry assessment.

Unit List - Family Overflow Shelter 2 - FP Floor 1					
				Display	All Beds
	Date In	Floor	Room	Bed	Client
		1st Floor	101 King Bed	Bed 001	EMPTY
	08/04/2023	1st Floor	101 King Bed		(12887) client, test2

12. Under **Entry Data**, fill out this assessment, again checking the relationships to head of household. Some sections are only for the Head of Household, or only for adults, so those can be skipped as appropriate.
13. Repeat these steps for every member of the household, until all have a complete assessment.

ENTER A HOUSEHOLD WITH A REFERRAL

1. Make sure that the client has a referral before beginning. The referral should be viewable in the **Outstanding Referrals** section on the **Shelter Inventory** page.
2. Follow steps 1-3 in the above instructions to navigate to the **Unit List**.
3. At the bottom of the **Unit List**, find the box labeled **Outstanding Referrals**. Click the green button next to the name of the client.

Reservations for Unit List - Simpson Women's Shelter										
Arrival Date	Name	Date of Birth	Gender	Group ID						
<input type="button" value="Add Reservation"/> No matches.										
Outstanding Referrals - Simpson Single-ES-HCC-HUD-ESG CV-Hennepin-Women's Shelter (4085) - 1 total <input type="button" value="Check Unit Availability"/>										
Referral Date	Name	Ranking	VI-SPDAT	VI-FSPDAT	TAY-VI-SPDAT	Need Type	Referred By	Date of Birth	Gender	Group ID
09/27/2023	(1) Phoenix, The					Emergency Shelter	Hennepin-HCC-Adult Shelter Connect (4083)	01/20/1981		
Showing 1-1 of 1										
<input type="button" value="Return to Shelters Dashboard"/>			<input type="button" value="Print ID Cards"/>		<input type="button" value="Update Confirmation List"/>		<input type="button" value="Transmit Today's Check Out List"/>			

- Confirm the date of shelter entry and assign the correct bed to the Head of Household using the **Assign Unit** button. Without a unit assignment, the client will be recorded as in Overflow.

Unit Entry Data - (1) Phoenix, The

Date In *	09 / 27 / 2023	10	: 27	: 22	AM	Midnight Check In
Unit Name / Number	Overflow					Assign Unit

- Scroll down to the **Household Members** tab. Check off any other clients in the Household staying at the shelter, and use Assign Unit to record their bed assignments as well.

Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(147) Male Single Parent

(714) Phoenix, Joey [Assign Unit](#)

(1) Phoenix, The [Assign Unit](#)

- Scrolling down further, under **Entry Data**, confirm the provider and select Basic as the **Entry Type**.

Entry Data

Provider *	Hennepin-ES-HCC-<->-Family Overflow 2 FP (6390)	Search	My Provider	Clear
Type *	Basic			

- Complete the **Entry Assessment** for the **Head of Household**. Click Save and Exit.
- In the above instructions, complete steps 11 and 12 for every additional household member.



EXIT A HOUSEHOLD FROM SHELTER

- In the menu on the left-hand side of Community Services, click on **ShelterPoint**.
- If there are multiple options, select the **Provider** and **Unit List** you will be entering the clients into. Then, click **Submit**.

View Shelter Inventory

Provider *	Hennepin-ES-HCC-<->-Family Overflow 2 FP (6777)	Search	My Provider	Clear	Check Unit Availability
Unit List *	-Select-	Submit			

- On the resulting ShelterPoint Dashboard, click on **Show All**, which will bring you to the **Unit List**.
- Find the head of household and click on the red check-out button on their row.

	Date In	Floor	Room	Bed	Client
	08/11/2023	2nd Floor	201 Two Queen Beds, ADA Accessible	Bed 001	(98311) household, testing
	08/11/2023	2nd Floor	201 Two Queen Beds, ADA	Bed 002	(542704) Child, Test Entry

- You should now be on the **Unit Entry** page. Choose the **Reason for Leaving** and the **Destination**.
- Under **Household Members**, select the checkbox to select all members of the household.

Household Members

To update Household members' Check Out data, click on the box beside each member. Members who are disabled and appear for in...

(39195) Female Single Parent

(98311) household, testing (Date In: 08/11/2023 7:52:22 AM) (Primary Client)

(542704) Child, Test Entry (Date In: 08/11/2023 7:52:22 AM)

- Scroll down and click **Save and Exit**. This will take you back to the **Shelter Inventory** page.