



How-To Guide

ServicePoint 4.04
- ShelterPoint -

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Shelter Point provides functions for shelter staff to reserve beds, extend nights stays, check out and update occupancy, and document services provided.

Viewing Bedlists

Staff can view the current residence and availability in a shelter. The bedlist should automatically be available when you click on the ShelterPoint tab. If there is more than one bedlist for your agency you can select the bedlist you are interested in viewing:

1. Click the **ShelterPoint** tab at the top of the screen.
2. In the *Viewing Bedlists for Provider* field, select a provider and click **Submit**.
3. Select a bed list and click **Submit**.

The screenshot shows the ServicePoint web application interface. At the top, there is a navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint (highlighted), ActivityPoint, SkanPoint, Reports, Admin, Help, and Logoff. Below the navigation bar, there is a section titled "View Bedlists for Provider" with a dropdown menu set to "Test Program 1" and a "Submit" button. Below this, there is a "View Information for Bedlist" section with a "Bedlist" dropdown and a "Submit" button. A note states: "Households must be established in ClientPoint before making reservations for or checking in Families." Below the note, there is a section titled "Reservations for Bedlist - Bedlist" with an "Add Reservation" button and a table showing "No Reservations found for this bedlist." Below this, there is a section titled "Bedlist (Bedlist - Emergency Shelter)" with a table of bedlist details. The table has columns: Floor, Room, Bed, Hold, Client, DOB, Gender, Group ID, Conf., and Codes/Notes. The table contains several rows of data, including "1st Floor 102 *New Bed*" and "1st Floor 101 *New Bed*" with client information.

Reserving A Bed

Shelters can indicate potential shelter occupants by entering his or her information.

1. Click Add Reservation.

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Home ClientPoint ResourcePoint ShelterPoint ActivityPoint SkanPoint Reports Admin Help Logoff

View Bedlists For Provider Test Program 1 [Submit]

[Check Bed Availability](#)

View Information For Bedlist Bedlist [Submit]

Note: Households must be established in ClientPoint before making reservations for or checking in Families.

Reservations for Bedlist - Bedlist [Add Reservation]

Arrival Date	Client	DOB	Gender	Group ID
No Reservations found for this bedlist.				

2. Search for the client by name or Client ID number. If searching for a client by name, click **Search For Client**.
3. Choose the correct client from the list of possible matches or if you are creating a new client, click **Add Client with This Information**.

Possible client search match

Search for a client

Add a new client

Possible Matches (refine your results or add as new below) showing 1-1 of 1 (<<First <Prev | Next> Last>>)

Name	SS#	Date of Birth	Gender	Banned
* Angel, Charlie (#342)	111-11-1111	02/14/1863	Female	

showing 1-1 of 1 (<<First <Prev | Next> Last>>)

Search Using Client ID. Scan or Enter Client ID [Search this id]

Add Client With This Information

Change your criteria and "Search for Client" to reduce the potential matches.

Last Profile [-Select-]

First [Charlie] MI [] Last [Angel]

Suffix []

SS# [] - [] - []

Search Filter Exact Match?

[Search For Client] [Add Client With This Information] [Cancel]

- The reserve date field is prefilled with today's date, if you wish to change the date of the reservation enter the new information in to the reserve date field.
- If the reservation is for additional household members, click the check boxes next to the additional household members' names.
- Click **Save and Continue**. The client's name and arrival date is displayed in the reservations section of the page.

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Home ClientPoint ResourcePoint ShelterPoint ActivityPoint SkanPoint Reports Admin Help Logoff

View Bedlists For Provider Test Program 1 [Submit]

[Check Bed Availability](#)

View Information For Bedlist Bedlist [Submit]

Note: Households must be established in ClientPoint before making reservations for or checking in Families.

Reservations for Bedlist - Bedlist [Add Reservation]

	Arrival Date	Client	DOB	Gender	Group ID
cancel reservation Check In	09/22/2009	Angel, Charlie (#342)	02/14/1863	Female	

Bedlist (Bedlist - Emergency Shelter)

Display All Beds [Sort By Bed] [Ascending] [Filter]

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/ Notes
1st Floor	102	*New Bed*	Hold	EMPTY					
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	101	*New Bed*		doe, john (#341)	01/01/1800	Male		No	
1st Floor	1601	*New Bed*		bill, dollar (#343)	12/12/1812	Transgender		No	He is violent...
		Overflow (new)		EMPTY					

Checking In Clients With Reservations

Use the function if you have an individual with reservations is checking into shelter.

- Under the Reservation for Bedlist heading, click **checkin** link.
- Click the **Assign Bed** button and select a bed.
- Enter any supplies given or assigning a client locker number.

Reservation Check In: Bed Stay Data - Charlie Angel (Female 02/14/1863 111-11-1111)

Date In: 09/22/2009 01 : 02 PM

Bed Name/Number: 1st Floor 102 *New Bed* Assign Bed

ID: 102

Overflow Bed Name (optional):

Supplies given: Grooming Kit

Locker #: 102

Codes/Notes:

Save Cancel

- In the Codes/Notes field, enter notes as appropriate.
- Click **Save**. The client is removed from the reservation list and added in the Bedlist.

Reservations for Bedlist - Bedlist Add Reservation

Arrival Date	Client	DOB	Gender	Group ID
No Reservations found for this bedlist.				

Bedlist (Bedlist - Emergency Shelter)

Display: All Beds Sort By: Bed Ascending Filter

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	101	*New Bed*		doe, john (#341)	01/01/1800	Male		No	
1st Floor	1601	*New Bed*		bill, dollar (#343)	12/12/1812	Transgender		No	He is violent...
1st Floor	102	*New Bed*		Angel, Charlie (#342)	02/14/1863	Female		No	
		Overflow (new)		EMPTY					

Check-In Clients Without Reservations

This is used to enter a client into shelter if they do not have a reservation; shelter staff can also enter needs and additional services provided using this function.

- Click the **Empty** link next to the bed to be assigned. If no beds are available, click **Empty** link next to the Overflow bed option.

Bedlist (Bedlist - Emergency Shelter)									
		Display	All Beds	Sort By	Bed	Ascending	Filter		
Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	201	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	101	*New Bed*		doe, john (#341)	01/01/1800	Male		No	

2. Search for the client by name or Client ID number. If searching for the client by name, Click **Search for Client**.

Search Using Client ID.

Scan or Enter Client ID

Add Client With This Information

Change your criteria and "Search for Client" to reduce the potential matches.

Last Profile

First MI Last

Suffix

SS# - -

Search Filter Exact Match?

3. Choose the correct client from the list of possible matches if you are creating a new click **Add Client with this Information**.
4. Update shelter date if necessary; enter supplies given, locker # if assigned, and any notes.
5. If the client has additional household members to check-in, click the checkbox next to each person to be checked in and click **Assign Bed** button and select a bed for each person then click submit.
6. Chose any services that have been provided to the client upon check in. If the services are provided to other household members are sure to check the box under the words "Multiple Services".
7. Date of services can be changed to reflect the actual date the services were provided.
8. Enter the status to Close if you have provided the service.
9. Click **Save Changes**.

Supplies and Locker Number

Household member check box

Assign bed to checked member(s)

Services

Save & Continue

Bed Stay Data - Daffy Duck #128 (Female 01/01/1959 123-56-7890)

Date In: 09/22/2009 01 : 57 PM [Midnight Check In](#)

Bed Name/Number: 1st Floor 202 *New Bed*

Supplies given:

Locker #:

Codes/Notes:

Household members

To checkin household members also, click on the box beside each name. Then assign each member a bed. If no bed is specified, an Overflow bed will be used. Note: Only members from the same household may be selected.

Household #1 Members:

*boop, betty

Infractions for Daffy Duck

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No infractions found for this client.						

Services

Multiple Services

Warning: 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 reentered.

Provider: ShelterLink Test Agency (#55)

Service List

of Services: Service: -Select-

Start Date: 09/22/2009 01 : 57 PM End Date: :

Status: Identified

Services

Holding Shelter Beds

A housing provider may choose to use the hold option if they do not have the individual or families information but are aware that the bed will be occupied and want to make sure other shelter staff are aware that the bed is reserved.

1. Click the **Hold** link. The Empty link will change to Held.

Bedlist (Bedlist - Emergency Shelter)									
		Display	All Beds	Sort By	Bed	Ascending	Filter		
Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	201	*New Bed*	HELD						
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	101	*New Bed*		doe, john (#341)	01/01/1800	Male		No	
1st Floor	1601	*New Bed*		bill, dollar (#343)	12/12/1812	Transgender		No	He is violent...
1st Floor	102	*New Bed*		Angel, Charlie (#342)	02/14/1863	Female		No	
1st Floor	202	*New Bed*		Duck, Daffy (#128)	01/01/1959	Female	802	No	
1st Floor	201	*New Bed*		boop, betty (#285)	11/16/2004	Female	802	No	
		Overflow (new)		EMPTY					

NOTE If the shelter has a room with four single beds and is checking a household with three members into the room, the shelter may want to hold the fourth bed if possible so that the household may have privacy.

Confirming Clients Stay Individually

This is used if you would like to confirm and individual or single family for a stay the following night.

1. From the bed list, click the client's name.
2. Select Yes next to the confirmed for next day stay field.
3. To add more data to a client record, click **Jump to Client Profile** button.
4. To add more services to the client's record, click **Jump to Multiple Services** button.
5. Click **Save & Exit**.

Date In: 09/21/2009 11:59 PM

Confirm for Next Day Stay? **Yes**

Bed Name/Number: 1st Floor 1601 *New Bed* Reassign Bed

ID: 105

Overflow Bed Name (optional):

Supplies given: None

Locker #: None

Codes/Notes: He is violent

Date Out:

Supplies returned?: -Select-

Cost of Service 1: Source 1 -Select-

Cost of Service 2: Source 2 -Select-

Household members

No Household members were found for this client.

Infractions for dollar bill Add new infraction to Client

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No Infractions found for this client.						

Buttons: Save & Exit, Save, Jump To Client Profile, Jump To Service Transactions, Jump To Multiple Services, Cancel

Confirming Clients Stay Using A Confirmation List

Use this function if you are reserving multiple clients for a shelter stay for the next day.

1. Click **Update Confirmation List** button.

Bedlist (Bedlist - Emergency Shelter)

Display: All Beds | Sort By: Bed | Ascending | Filter

Floor	Room	Bed	Hold All	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	201	*New Bed*	HELD						
1st Floor	202	*New Bed*	Hold	EMPTY					
1st Floor	101	*New Bed*		doe, john (#341)	01/01/1800	Male		No	
1st Floor	1601	*New Bed*		bill, dollar (#343)	12/12/1812	Transgender		Yes	He is violent...
1st Floor	102	*New Bed*		Angel, Charlie (#342)	02/14/1863	Female		No	
1st Floor	202	*New Bed*		Duck, Daffy (#128)	01/01/1959	Female	802	No	
1st Floor	201	*New Bed*		boop, betty (#285)	11/16/2004	Female	802	No	
		Overflow (new)		EMPTY					

Show Outstanding Referrals (0 total)

Buttons: Update Confirmation List, Transmit Today's Check Out List, Print ID cards

2. Click the checkbox next to each client you wish to confirm the next day stay night.
3. Click **Confirm**.

Confirmation Screen [print](#)

Confirm for Next Day	Client Name	Group ID	Bed #
<input checked="" type="checkbox"/>	Angel, Charlie (#342)		*New Bed*
<input checked="" type="checkbox"/>	bill, dollar (#343)		*New Bed*
<input checked="" type="checkbox"/>	boop, betty (#285)	802	*New Bed*
<input checked="" type="checkbox"/>	doe, john (#341)		*New Bed*
<input checked="" type="checkbox"/>	Duck, Daffy (#128)	802	*New Bed*

Check/Uncheck all Clients

Check-Out Individually

1. From the bed list, click the client's name.
2. Enter the Date Out and Time the client left.
3. Indicate the return of any supplies.
4. Enter the cost of service, if you wish to record it.
5. Click **Save and Exit**.

Bed Stay Data - dollar bill (Transgender 12/12/1812 111-22-3344)

Date In: 09/21/2009 11 : 59 PM

Confirm for Next Day Stay? Yes

Bed Name/Number: 1st Floor 1601 *New Bed* Reassign Bed

ID: 105

Overflow Bed Name (optional):

Supplies given: None

Locker #: None

Codes/Notes: He is violent

Date Out: 09/22/2009 04 : 15 PM

Supplies returned? Yes

Cost Of Service 1: Source 1 -Select-

Cost Of Service 2: Source 2 -Select-

Household members

No Household members were found for this client.

Infractions for dollar bill Add new infraction to Client

Banned Start	Banned End	Infraction	Ban Code	Provider	Sites	Staff
No Infractions found for this client.						

Save & Exit Save

Check-Out Using A Transmit List

You may want to use a list if you are checking out multiple clients as the same time. This is very useful if you do a daily check out of you shelter clients.

1. Click on **Transmit Today's Checkout List** button at the bottom of the page.
2. Click the checkbox next to each client you are checking out.
3. The current date and time will pre-fill in the field, if you wish to enter individual check out times for each client enter Date/Time Out and indicate the return of any supplies
4. Use the Current Checkout Date Field to set the same checkout date and time for all clients. Click **Set Dates**.
5. Click **Check Out**.

Check Out Screen [print](#)

* There are clients in the bedlist with future check out dates. These clients are listed in a separate table beneath the table containing clients with current check out times.

Current Check Out Date: :

Check Out?	Client Name	Bed #	Date Out	Time Out	Supplies Returned?
<input checked="" type="checkbox"/>	Angel, Charlie (#342)	*New Bed*	<input type="text" value="09/22/2009"/>	<input type="text" value="03"/> : <input type="text" value="17"/> <input type="text" value="PM"/>	<input type="text" value="Yes"/>
<input checked="" type="checkbox"/>	boop, betty (#285)	*New Bed*	<input type="text" value="09/22/2009"/>	<input type="text" value="03"/> : <input type="text" value="17"/> <input type="text" value="PM"/>	<input type="text" value="Yes"/>
<input checked="" type="checkbox"/>	doe, john (#341)	*New Bed*	<input type="text" value="09/22/2009"/>	<input type="text" value="03"/> : <input type="text" value="17"/> <input type="text" value="PM"/>	<input type="text" value="Yes"/>
<input checked="" type="checkbox"/>	Duck, Daffy (#128)	*New Bed*	<input type="text" value="09/22/2009"/>	<input type="text" value="03"/> : <input type="text" value="17"/> <input type="text" value="PM"/>	<input type="text" value="Yes"/>

Check/Uncheck all Clients

Future Check Out Date: :

Check Out?	Client Name	Bed #	Date Out	Time Out	Supplies Returned?
<input type="checkbox"/>	bill, dollar (#343)	*New Bed*	<input type="text" value="09/22/2009"/>	<input type="text" value="04"/> : <input type="text" value="15"/> <input type="text" value="PM"/>	<input type="text" value="Yes"/>

Check/Uncheck all Clients