

OFFICE OF SUPPORTIVE HOUSING

HOMELESS MANAGEMENT INFORMATION SYSTEM

SHELTER SERVICES STAFF MANUAL

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## **SHELTER SERVICES STAFF AND SUPERVISOR**

Job Role: The Shelter Services staff has the following responsibilities:

- a. "Accepting the POS".
- b. Print the daily bed check list.
- c. Mark "Attendance" on the daily "Shelter Attendance Screen" based on the bed check list.
- d. "Close a POS" in order to delete the client from the Attendance Screen.
- e. Report Shelter/Client Incidents and Client Complaints.

The **Shelter Services Supervisor** oversees and supports the above functions and "Submits" the Attendance on a daily basis. They also maintain the unit bed configuration.

## ACCEPTING A POS

**Purpose** The “Accept a POS” function has the following purposes:

1. Transferring the file to the shelter so the worker can access the data.
2. Notifies the HMIS system that the client has reached the shelter
3. Assigns a client to a unit so that the vacancy is no longer available to the System.
4. Delete No-shows from the Attendance Screen.
5. View Reception Interview.

Note: The Shelter Services staff should “Accept the POS” when the client arrives for service. This releases the file to the shelter immediately. If the POS is not “Accepted” at this time, it will be automatically “Accepted” when the “Attendance” is saved. However, this may not happen until late at night or the next morning.

A POS which is written by an Intake or After Hours worker will appear on the “Accept POS” screen. A POS written by a case manager will not appear on this screen.

**Note: A POS written between 12AM and 5AM is a special situation that will be discussed in training.**

## ACCEPT POS PROCEDURE

- At the left hand side of the screen, choose “POS”
- Choose “Accept POS”. This screen lists all clients whose POS’s have not been Accepted.
- Double click the correct POS on the “Accept POS” screen.
- At the “Accept POS” screen **for the client** chosen, go to the “POS Acceptance” block
- At “Client Admitted? Choose “Yes” or “No. **The “No” choice will be used primarily if the client is a “No Show” at the shelter.** “Refused will be chosen if the shelter does not want to admit the client. By choosing either option, the client will no longer appear on the Attendance screen. If the choice is “No” or “Refused: the POS will be automatically closed with the same date as the Start date, which means that there was no night of occupancy.
- Next to the “Unit No” is a magnifying glass. Click this, and the “Shelter Unit Assignment” screen will appear. Double click on the room to which you want to assign the client. Note: Assigning a room at this point is optional. However, the unit must be assigned on the “Attendance Screen”.
- At the bottom of the screen, choose “Save.”

Note: The “Accept POS” which lists all clients whose POS’s are to be accepted has a “Refresh” at the bottom. Choose “Refresh” to make sure that all previously accepted POS’s do not appear on this screen.

## VIEW INTAKE

- At the bottom of the “Accept POS” screen there is a block called “View Intake”. This choice will allow the worker to view the “Reception Interview” screen that has basic client data, alerts, contact info, health issues and recent addresses.

## ATTENDANCE SCREEN

### GENERAL

The Shelter Attendance screen shows all clients who have POS’s written to a particular shelter for a particular day. This includes clients who are at the shelter, those who are no shows, and those who have excused absences. **As long as the POS covers the day, the client will appear on the Attendance screen.**

Shelters which have multiple bed checks can mark clients as Attended or not Attended as many times as necessary during the night. The Attendance screen can be “Saved” multiple times.

The Shelter Services Supervisor will “Submit” the Attendance the next morning. Once Attendance is submitted, any adjustments must be performed on the “Attendance Adjustments” screen.

### ATTENDANCE SCREEN

The Attendance screen has the following columns:

- Attended - This column is checked if the client is present and not checked or unchecked if the client is not present.
- Client – Shows the Client Name and any children listed on the case. Children’s names are indented.
- Relationship – Shows the relationship of each member of the family to the Head of Household.
- OESS Number – OESS Case Number
- Unit Number – The unit number for the client. A unit must be assigned to each client.
- Reason for Absence – Choose the reason for a client absence
- Unit Available – Check this block to free the unit for another client.

In order to navigate through the screen, use the scroll bar on the right hand side.

## Other Attendance Screen Functions

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**Night of 7/12 To Morning of: 7/13:** In the example, the Attendance would show clients who were at the shelter from the Night of 7/12 until the morning of 7/13. This is to allow for clients who come in during the night. The time frame shown does not include the Night of 7/13. **Note that the Attendance screen date will change to the following day after Midnight. It is very important for anybody doing Attendance after Midnight, to change the Screen date to the Previous Night or they will be doing attendance for the wrong night.**

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**Unit Assignment:** This field should say “1 unit per family member” if the shelter assigns each client and children to a particular bed. Use “1 Unit per Case Number” if the shelter assigns clients to rooms and does not number beds separately.

**Sort On:** The Attendance list can be sorted either alphabetically or by unit number. Choose whichever sort is desired and click “Refresh”.

**Select All:** Check this box to mark as attended all clients who have a **room assigned**. A large shelter may decide to check this box rather than mark each client as Attended. The shelter can then uncheck any clients who are not at the shelter. If a client is not assigned to a room, the “Select All” box will not check these clients.

**Printing the Attendance List Report:** At the bottom of the screen are three print buttons.

**The first says “Print Attended Clients”.** This selection will print only the clients who have a Red check mark in the Attended column. The list will be either alphabetical or by unit number, depending on which sort has been selected.

**The second print button says “Print All clients”.** This button will produce a list of all clients who have POS’s to the shelter whether or not they are currently at the shelter. **This report can be used as the Bed List. Note:** Most shelters will probably sort the list by unit if they want to use the list for bed checks.

**The third button says “ Bed Sheet”.** This screen displays a list of all units (occupied and vacant) at the shelter. Occupants shown on the list will those for whom Attendance has been submitted.

These three reports have a navigation button located at the bottom left of the screen. Choose the single arrow to scroll forward or backward through the pages.

## SHELTER ATTENDANCE PROCEDURE

1. Print list of tentative shelter clients using the “**Print All Clients**” button described above. Make sure you select Sort on “Unit” or “ Client” and press “Refresh” before you print. **Make sure that the date is correct. Remember that the Attendance Screen Date is changed after midnight. It should be reset to the previous day if you are doing Attendance on the next morning.**
2. The clients who are not in units appear at the top of the list when the “Unit” sort is used.
3. The list (sorted by unit) can be used as a worksheet during bed checks to make notes on any changes. Any clients not listed should be noted on the bottom of the worksheet.
4. After the bed check, return to the Attendance screen and post the appropriate entries. “Save” the screen.
5. The unit number can be directly entered in the “Unit” column without using the magnifying glass to obtain the bed list. Unit changes can also be entered in this column.
6. If there is a unit that is occupied and is not listed on the printout, note this in the Comments, and the Shelter Services supervisor will register the unit in the morning.
7. On the Attendance screen, the clients who are present should have a “Red” check mark in the “Attended” column.
8. If a client is absent, choose the correct reason in the “Reason for Absence” column. If the reason is “Approved Absence”, the unit will be retained for the client. If any of the other reasons are chosen, the unit is deleted for the client. In both cases, the Red Checkmark in the “Attended” column will be deleted.
9. If there are clients in the shelter who are not on the Attendance list, this means that a POS was not written covering the day. Follow whatever procedure the shelter has established for writing a POS. This may require OESS to write the POS, or the “After Hours Clerk” to write the POS if the shelter has that job role.
10. Note that a client who enters the shelter after midnight will have a POS with the wrong date. Go to the “Change POS” function, and re-set the “Start Date” to the previous night.
12. After the Attendance screen list is correct, choose “Save”.
13. “Print Attended” button produces clients who are present.

## **UNAVAILABLE UNIT**

The “**Unavailable Unit**” column on the “Shelter Unit Assignment “ screen would be checked in situations such as the following :

- The room has 4 beds, and the family only has 3 members. If the shelter does not want to place a single person in the 4<sup>th</sup> bed, this bed would be marked “unavailable”

## **PROCEDURE**

- Click the magnifying glass next to “Unit No” and the “Shelter Unit Assignment” screen will appear.
- Click the box in the “Unavailable” column.
- Save the transaction, and the line will turn pink.

## **CLOSING A POS**

**Purpose:** A POS is closed when the client leaves the Shelter. In HMIS, the POS that is initially written shows a “Start Date” and a “Projected End Date”. When the POS is closed, an “Actual End Date” is entered. This is the real date on which the client left the shelter. Closing a POS will delete the POS entry from the daily Attendance Screen. This is the only way to get a client off of the Attendance screen.

HMIS allows you to close either all members of the family, or just individual family members

The Procedure is as Follows:

- Click POS on the left hand side of the screen
- Click “Close POS”
- The screen will display the last POS written since this is the one that will probably be closed.
- Enter “Close Type”. This will be either “Whole POS” or Individual. If Individual, click the individual(s) you want to close.
- Enter “Actual End Date”
- Enter “Reason for Termination”. This field is mandatory.
- Click “Close POS”. The Clients’ data in the grid will turn to Red.

## **POS HISTORY**

**This function** is used to view all the POS's which have been written for the client.

- Click "POS History". The entire POS History will be displayed.
- Double click the POS you want to view and the details will appear on the screen.

## **TRANSFER POS**

This function allows the shelter to write a POS to another shelter. The screen is the same as the Create/Change POS. The only difference is that the POS Site field lists all sites instead of just the site of the worker writing the POS.

**At the shelter, the only job roles authorized to Transfer POS's are the CM Supervisor, Shelter Service Staff, Shelter Service Supervisor, and Shelter Service Administrator**

## SHELTER/CLIENTS INCIDENTS

**Purpose:** This screen records any incidents related to either the shelter or the client and the Outcome of the investigation. Examples of shelter related incidents might include Fire, Health and Safety, Overcrowding. Examples of client related issues include violence, injuries, and medical emergencies.

**This screen shows all incidents for the shelter, and is not limited to incidents for the client whose name is a the top of the screen.**

### **Procedure:**

- Click “Incidents” on the left hand column
- Choose “Shelter/Client Incidents.
- Page 1 describes the Incident
- Enter fields as appropriate
- Note that there is an “Incident Related To” field. Choose either “Client” or “Shelter”. Note that the “Incident” list changes depending on whether you choose Client or Shelter.
- Enter “Notes” as appropriate.
- Go to P.2. this page describes the Investigation and Outcome of the Incident
- Click “Save”. The OESS compliance analyst will complete this portion of the form.

## **SHELTER SERVICES SUPERVISOR ROLE**

Role: The Shelter Services Supervisor will review the previous night's submission, make any corrections, and Submit the Attendance.

The Supervisor will also have the responsibility of creating the room configuration and keeping this updated.

### **REVIEW PREVIOUS NIGHT SUBMISSION**

- Enter the Attendance Screen.

**(Note: Make sure that the date is reset to the previous night or you will be doing attendance for the wrong day**

- Sort list by Unit or Client.
- Choose "Print Attended" list.
- Review the list.
- Make any corrections. Corrections might include changing a unit or deleting a unit for a client, or writing a POS for a client not shown on the Attendance list.
- Save the Attendance screen
- Press "Submit" to submit the final Attendance list. Once the daily attendance has been submitted, you cannot make any adjustments to the Shelter Attendance screen.
- Reprint the Attended list for the file.

### **ATTENDANCE ADJUSTMENTS**

After the Attendance has been submitted, you may find that some entries need modifying. Examples might include deleting a room assignment, adding a client to the list, or deleting an incorrect entry.

**Note: This screen can only be used after the Attendance for a particular day has been submitted.**

**Enter the "Attendance Adjustments" screen and click Refresh to obtain the current date.**

Make any adjustments and click "Save"

Any adjustments made to this screen will appear with a Pink line on the Adjustments screen and on original Attendance screen. In order to see these adjustments on the original screen, close the Adjustments.

## **TRANSFER POS**

This function allows the shelter to write a POS to another shelter. The screen is the same as the Create/Change POS. The only difference is that the POS Site field lists all sites instead of just the site of the worker writing the POS.

**At the shelter, the only job roles authorized to Transfer POS's are the CM Supervisor, Shelter Service Staff, Shelter Service Supervisor, and Shelter Service Administrator.**

## **UNIT MAINTENANCE**

To add or delete a unit, go to the main HMIS screen and choose "Maintenance". Then choose "Unit Master". The "Site Unit Master" screen appears. This function is used to Add a Unit, Modify information on a unit, Delete a Unit, or Rename a Unit.

### **Add a Unit**

- On the right hand side of the screen, choose "Unit" and enter the unit designation.
- Enter "Type" of unit, which refers to the bed type.
- Enter "Client Type"
- Enter No of Adults, No of Children, and Total Capacity.
- Choose "Save"

### **Modify Information on a Unit**

- On the left hand side of the screen, double click the Unit for which information is to be modified. The details will appear in the right hand column.
- Modify any details and Save the transaction.

### **Delete a Unit**

- On the left hand side of the screen, double click the Unit that is to be deleted. The details will appear in the right hand column.
- Click the "Delete" key at the bottom of the screen.

### **Renaming a Unit**

If a unit requires renaming or splitting a room into beds, call OESS at 215-686-7110 for assistance.

