

OFFICE OF SUPPORTIVE HOUSING
HOMELESS MANAGEMENT INFORMATION SYSTEM

SHELTER SERVICES STAFF TRAINER MANUAL

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Review client flow through system. Start with Intake, writing of POS, Accept POS screen, Attendance screen. Just discuss in a general way that these are the steps.

Log In Procedure

Demonstrate how to Enter HMIS using Terminal Services
Enter HMIS User ID and Password.

I. HMIS Application/Navigation

- Discuss Title Bar with User Name, Job Role and Site. Emphasize that the Staff must have their Shelter's Site Name at the top of the screen.
- The "Job Role" should be either "Shelter Service Staff" or "Shelter Service Staff Supervisor", depending on who is doing the function.
- Explain Task Icons on the left of the screen and how you change to Screen Icons on top of screen. The Screen Icons allow access to all the detailed screens in which data is entered.
- Demonstrate how to navigate around the screens.
- Screen Dragging- Frequently, the bottom of the screen where the "Save" and "Cancel" buttons are located is not visible. Show the worker how to move the screen up by clicking on the Blue Bar at the top of the screen and moving the screen until they can see the "Save" and "Cancel" functions
- Show how to retrieve a client using "Find" at the top of the screen.
- Discuss in detail the "Shelter Services Staff" manual. This manual has all details of the job function.

II. Accept POS (Note: If posting POS's, do not write POS's from case manager job role or they will not post to Accept Screen)

- **Discuss POS . What is a POS.**
 - Admission Ticket to Shelter for Client
 - Tracking information for case manager
 - Basis of monthly shelter billing
- **POS Dates:** "Start Date" is the first night of shelter. "End Date" is the "Morning of Departure" and does not count as a night of shelter.
- Review "Accept POS" procedure. (from manual).
- Discuss importance of "Accepting the POS" when the client arrives at the shelter. If not done then, the file will not be released until the POS is accepted. However, when "Attendance" is saved, POS will automatically be accepted. Since Attendance will not be done until late at night or the next morning, the shelter has to decide how important it is to release the file when the client arrives.
- Discuss procedure if "No" is chosen for Client Admitted". This choice will occur if client does not show up, and it is necessary to take the client off the Attendance Screen. "No" will make the Start and End Dates the same so that there is no shelter stay.
- Assign client to room.
- Discuss backdating by one day of a POS written between 12AM and 6AM. This will get the client on the previous night's Attendance screen.
- Review "View Intake" button to see case details.

III. Attendance Screen

- Review the purpose of this screen from the “General” section of the Manual. Shelters are only paid for those on the Attendance screen
- **Emphasize that the date must be set back one day. You are not doing Attendance for Today.**
- Emphasize that “Attendance” screen can be saved multiple times during the night. It is only after it has been “Submitted” that no further adjustments can be made on the “Attendance” screen. Further changes can be done on the “Attendance Adjustments” screen.
- Review “Attendance Screen” columns. (from Manual)
- Review “Attendance Screen” functions (from Manual).
- Enter rooms for client.
- Discuss “Sort On” function. Allows the Screen and Reports to be sorted alphabetically or by “Unit Number”. Sort by “Unit Number” will probably be used as the bed sheet.
- Printing - There are two print functions. “**Print Attended Clients**” prints those who have a red check in the “Attended” column. “**Print All Clients**,” prints the list of all clients with a POS to the shelter, whether they are there or not. **This list should be used as the bed sheet. Most shelters will sort by “Unit No” for this report.**
- Review the “**Recommended Shelter Attendance Procedure**”. This procedure is only recommended. Some shelters will do bed checks during the night, enter the data, and “Save” the “Attendance Sheet” several times. Others will print the “**Print All Clients bed list**” list and make notes during the night. The actual attendance would be entered by staff the next morning from the bed list.
- “Unavailable Unit” function - Click the magnifying glass next to “Unit No” and the “Shelter Unit Assignment” screen will appear. Choose the unit to be made “Unavailable”. Click the “Unavailable” block, Save the transaction, and the line will turn pink. To make the room available, click the “Unavailable” block and remove the check.

Note that at this time, the room cannot be held for a specific person. It can only be Made “Unavailable”. The shelter will need to keep track of which rooms it wants to hold for individuals who will be returning.

IV. Close POS

- Demonstrate retrieving a global client using “Find” at top of screen. The Accept and Shelter Attendance screens are for all clients. Close POS requires retrieving the client and having the name at the top of the screen.
- This function will be used when a client leaves the shelter. **The important point is that this function will delete the client from the Attendance screen.** As long as there is an active POS, the client will remain on the Attendance screen. Another feature is that individual family members can be closed on the POS. This might happen if a child goes to foster care.

V. POS History

- Demonstrate POS History screen to view past client POS’s

VII. Shelter Incidents and Client Complaints

These screens record any incidents at the shelter or client complaints.
Review each screen.

IX. Shelter Services Supervisor

This person has several additional jobs concerning the Attendance function

- Review previous night's submission.
- “**Submit**” the Attendance daily.
- Perform any required “Attendance Adjustments” after the initial submission.
- Maintain Units. This might consist of Adding new units, deleting units, or changing information about unit capacities. If a Unit requires renaming or splitting a unit, contact OESS at 215-686-7110 for assistance.