



How-To Guide

ServicePoint 4.04

SHELTERPOINT

WISCONSIN

ServicePoint

HELP DESK _____

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

VIEWING BEDS

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**.

This is an example of the bed list. It allows staff to get an overview of the current shelter situation to assess capacity.

ServicePoint™ WI Department of Commerce, Bureau of Housing Apr 28, 2008
4.04 Training Provider / Madison

Home ClientPoint ResourcePoint **ShelterPoint** SkanPoint Reports Admin Help Logoff

View Bedlists For Provider 4.04 Training Provider [Submit]

[Check Bed Availability](#)

View Information For Bedlist Women's Emergency Shelter [Submit]

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

Reservations for Bedlist - Women's Emergency Shelter [Add Reservation]

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

Bedlist (Women's Emergency Shelter - Emergency Shelter)

Display All Beds Sort By Bed Ascending Filter

Floor	Room	Bed	Hold	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	Room A	Bed 1	All	Naef, John (#5439)			7670	No	
1st Floor	Room A	Bed 10		Naef, Chris (#5440)			7670	No	
1st Floor	Room A	Bed 2	Hold	EMPTY					
1st Floor	Room A	Bed 3	Hold	EMPTY					
1st Floor	Room A	Bed 4	Hold	EMPTY					
1st Floor	Room A	Bed 5	Hold	EMPTY					
1st Floor	Room A	Bed 6	Hold	EMPTY					
1st Floor	Room A	Bed 7	Hold	EMPTY					
1st Floor	Room A	Bed 8	Hold	EMPTY					
1st Floor	Room A	Bed 9	Hold	EMPTY					

RESERVING A BED

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

1. Click Add Reservation.

ServicePoint™ WI Department of Commerce, Bureau of Housing Apr 28, 2008
Connecting your community. 4.04 Training Provider / Madison

Home ClientPoint ResourcePoint ShelterPoint SkanPoint Reports Admin Help Logoff

View Bedlists For Provider 4.04 Training Provider [Submit]

[Check Bed Availability](#)

View Information For Bedlist Women's Emergency Shelter [Submit]

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

Reservations for Bedlist - Women's Emergency Shelter

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

[Add Reservation]

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 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
* Nelson, Joan (#5445)				

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

First MI Last Suffix

SS# - -

Search Filter Exact Match?

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

4. 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.
5. If the reservation is for additional household members, click the check boxes next to the additional household members' names.
6. Click **Save and Continue**. The client's name and arrival date is displayed in the reservations section of the page.

The screenshot shows the ServicePoint web application interface. At the top, there is a header with the ServicePoint logo, the text "WI Department of Commerce, Bureau of Housing", the date "Apr 29, 2008", and the user role "4.04 Training Provider / Madison". Below the header is a navigation menu with buttons for Home, ClientPoint, ResourcePoint, ShelterPoint (selected), SkanPoint, Reports, Admin, Help, and Logoff. The main content area is titled "View Bedlists For Provider" and shows a dropdown menu set to "4.04 Training Provider" with a "Submit" button. Below this is a link for "Check Bed Availability". Another section titled "View Information For Bedlist" shows a dropdown menu set to "Women's Emergency Shelter" with a "Submit" button. A note states: "Note: Households must be established in ClientPoint before making reservations for or checking in Families." Below the note is a section titled "Reservations for Bedlist - Women's Emergency Shelter" with an "Add Reservation" button. A table displays reservation details for a client named Nelson, Joan (#5445) with an arrival date of 04/29/2008. The table has columns for Arrival Date, Client, DOB, Gender, and Group ID. There are also links for "cancel reservation" and "checkin".


CHECKING IN CLIENTS WITH RESERVATIONS

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


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

Reservation Checkin: Bed Stay Data - Joan Nelson ()

Date In: 04/29/2008 10 : 32 AM

Bed Name/Number: 1st Floor Room A Bed 2 

ID: 1391

Overflow Bed Name (optional): 

Supplies given: grooming kit

Locker #: 457

Codes/Notes:

- 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 - Women's Emergency Shelter

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

Bedlist (Women's Emergency Shelter - 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	Room A	Bed 1	Hold	EMPTY					
1st Floor	Room A	Bed 10	Hold	EMPTY					
1st Floor	Room A	Bed 2		Nelson, Joan (#5445)				No	

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 (Women's Emergency Shelter - 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	Room A	Bed 1	Hold	EMPTY					
1st Floor	Room A	Bed 10	Hold	EMPTY					

2. Search for the client by name or Client ID number. If searching for the client by name, Click **Search for Client** (Note: It does not matter which name is selected - the name must merely associate with the household)

4. Choose the correct client from the list of possible matches if you are creating a new click **Add Client with this Information**.
5. Update shelter date if necessary; enter supplies given, locker # if assigned, and any notes.
6. 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.
7. 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”.
8. Date of services can be changed to reflect the actual date the services were provided.
9. Enter the status to Close if you have provided the service.
10. Click **Save Changes**.

NOTE: Emergency shelters should NOT have any shelter service codes on their Multiple Services Quicklist. If you give a client in shelter a service from the quicklist of Emergency Shelter, you are duplicating their shelter stay. This is wrong.

Bed Stay Data - Chris Naef #5440 (252-45-8628)

Date In: 04/29/2008 11 : 15 AM [Midnight Checkin](#)

Bed Name/Number: 1st Floor Room A Bed 1

Supplies given: grooming kit

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:

*Naef, John 1404 1st Floor Room A Bed 10

Infractions for Chris Naef

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: 4.04 Training Provider (#4065)

Service List # of Services: 0 Status: Identified

# of Services	2	Service	Personal/Grooming Needs
Start Date	04/29/2008 11 : 15 AM	End Date	04/29/2008 11 : 15 AM
Source 1	DONATIONS	Cost of Service 1 *	<input type="text"/>
Source 2	-Select-	Cost of Service 2 *	<input type="text"/>
# of Units *	<input type="text"/>	Unit Type	-Select-
Status	Closed	Outcome	Fully Met
If Need Not Met, Reason	-Select-		

 (* Indicates that this amount will be evenly divided by household members)

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.

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.

Bedlist (Women's Emergency Shelter - Emergency Shelter)

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

Floor	Room	Bed	Hold	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	Room A	Bed 1	Hold All	EMPTY					
1st Floor	Room A	Bed 10	Hold	EMPTY					
1st Floor	Room A	Bed 2		Nelson, Joan (#5445)				No	
1st Floor	Room A	Bed 3		Smith, Sally A (#2094)	01/02/2003	Female		No	
1st Floor	Room A	Bed 4		HELD				No	
1st Floor	Room A	Bed 5	Hold	EMPTY					
1st Floor	Room A	Bed 6	Hold	EMPTY					
1st Floor	Room A	Bed 7	Hold	EMPTY					

CONFIRMING CLIENTS STAY INDIVIDUALLY

This is used if you would like to confirm an 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 and Exit**.

Bed Stay Data - Sally A. Smith (Female 01/02/2003 387-33-2626)

Date In: 04/30/2008 01 : 55 PM

Confirmed for Next Day Stay? Yes

Bed Name/Number: 1st Floor Room A Bed 3 Reassign Bed

ID: 1392

Overflow Bed Name (optional)

Supplies given

Locker #

Codes/Notes

Date Out

Supplies returned? -Select-

Cost of Service 1 Source 1 -Select-

Cost of Service 2 Source 2 -Select-

Infractions for Sally A. Smith Add new infraction to Client

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

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.

View Information For Bedlist Women's Emergency Shelter Submit

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

Reservations for Bedlist - Women's Emergency Shelter Add Reservation

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

Bedlist (Women's Emergency Shelter - Emergency Shelter)

Display All Beds Sort By Bed Ascending Filter

Floor	Room	Bed	Hold	Client	DOB	Gender	Group ID	Conf.	Codes/Notes
1st Floor	Room A	Bed 1	All	Naef, Chris (#5440)			7679	No	
1st Floor	Room A	Bed 10		Naef, John (#5439)			7679	No	
1st Floor	Room A	Bed 2		Nelson, Joan (#5445)				No	
1st Floor	Room A	Bed 3	Hold	EMPTY					
1st Floor	Room A	Bed 4	Hold	EMPTY					
1st Floor	Room A	Bed 5	Hold	EMPTY					
1st Floor	Room A	Bed 6	Hold	EMPTY					
1st Floor	Room A	Bed 7	Hold	EMPTY					
1st Floor	Room A	Bed 8	Hold	EMPTY					
1st Floor	Room A	Bed 9	Hold	EMPTY					
		Overflow (new)		EMPTY					

Show Outstanding Referrals (0 total)

Update Confirmation List Transmit Today's Checkout List

Print ID cards

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

Confirmation Screen [print](#)

Confirmed for Next Day Stay?	Client Name	Group ID	Bed #
<input checked="" type="checkbox"/>	Naef, Chris (#5440)	7679	Bed 1
<input checked="" type="checkbox"/>	Naef, John (#5439)	7679	Bed 10
<input checked="" type="checkbox"/>	Nelson, Joan (#5445)		Bed 2

Save Cancel

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 - Joan Nelson ()

Date In: 04/29/2008 10 : 32 AM

Confirmed for Next Day Stay? Yes

Bed Name/Number: 1st Floor Room A Bed 2 Reassign Bed

ID: 1391

Overflow Bed Name (optional):

Supplies given: grooming kit

Locker #: 457

Codes/Notes:

Date Out: 05/01/2008 09 : 00 AM

Supplies returned? Yes

Cost Of Service 1: Source 1 -Select-

Cost Of Service 2: Source 2 -Select-

Infractions for Joan Nelson Add new infraction to Client

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

Save & Exit Save

Jump To Client Profile Jump To Service Transactions Jump To Multiple Services Cancel

CHECK-OUT USING A TRANSMIT LIST

You may want to use a list if you are checking out multiple clients at the same time. This is very useful if you do a daily check out of your 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](#)

Current Checkout Date: :

Checkout?	Client Name	Bed #	Date Out	Time Out	Supplies Returned?
<input checked="" type="checkbox"/>	Naef, Chris (#5440)	Bed 1	<input type="text" value="05/01/2008"/>	<input type="text" value="09"/> : <input type="text" value="53"/> <input type="text" value="AM"/>	<input type="text" value="Yes"/>
<input checked="" type="checkbox"/>	Naef, John (#5439)	Bed 10	<input type="text" value="05/01/2008"/>	<input type="text" value="09"/> : <input type="text" value="53"/> <input type="text" value="AM"/>	<input type="text" value="Yes"/>
<input type="checkbox"/>	Nelson, Joan (#5445)	Bed 2	<input type="text" value="05/01/2008"/>	<input type="text" value="09"/> : <input type="text" value="53"/> <input type="text" value="AM"/>	<input type="text" value="Yes"/>
<input type="checkbox"/>	Smith, Sally A (#2094)	Bed 3	<input type="text" value="05/01/2008"/>	<input type="text" value="09"/> : <input type="text" value="53"/> <input type="text" value="AM"/>	<input type="text" value="Yes"/>

Check/Uncheck all Clients with current checkouts