

Spokane Community Management Information System

# Housing Check-In

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## Introduction

This instruction manual is for CMIS projects that are using the night-by-night method of tracking emergency shelter utilization. This method of tracking is typically used in mass shelters and/or shelters where a significant proportion of clients enter and exit on an irregular bases. The night-by-night method relies on creating a separate record of each individual date on which a client is present in the shelter as a means for calculating length of stay. In this method: (1) entry information is collected (2) the project records every discrete date (or series of dates) that the client utilizes a bed; (3) the CMIS maintains historical data on the nights a client is sheltered; (4) the client may be exited or the system may be designed to automatically generate an exit after an extended absence; and (5) the duration of each stay can be accurately determined and aggregated based on bed nights provided to calculate each client's total length of stay in the project.

## How do I get started?

Log into ClientTrack and then select the appropriate workgroup and organization.

The image shows two screenshots from the ClientTrack application. The left screenshot is the login page, featuring the ClientTrack logo (by eccovia), a 'Sign in to ClientTrack' heading, and input fields for 'User Name' and 'Password'. A link for 'Did you forget your password?' is located below the password field, and a 'Sign in' button is at the bottom. The right screenshot is a profile configuration window. It includes a 'Workgroup' dropdown set to 'Spokane Workgroup' with a 'Design Mode' checkbox, an 'Organization' dropdown set to 'City of Spokane', a 'Location' dropdown set to 'City of Spokane', and a 'Theme' dropdown set to 'Default'. The user's name is 'Teague Griffith' with email 'tgriffith@spokanecity.org'. There are links for 'Change photo', 'Security settings', and 'Clear preferences'. 'Sign Out' and 'Apply' buttons are at the bottom.

## Navigate to the Client Workspace

Once you are logged into ClientTrack navigate to the Client Workspace using the carousel.

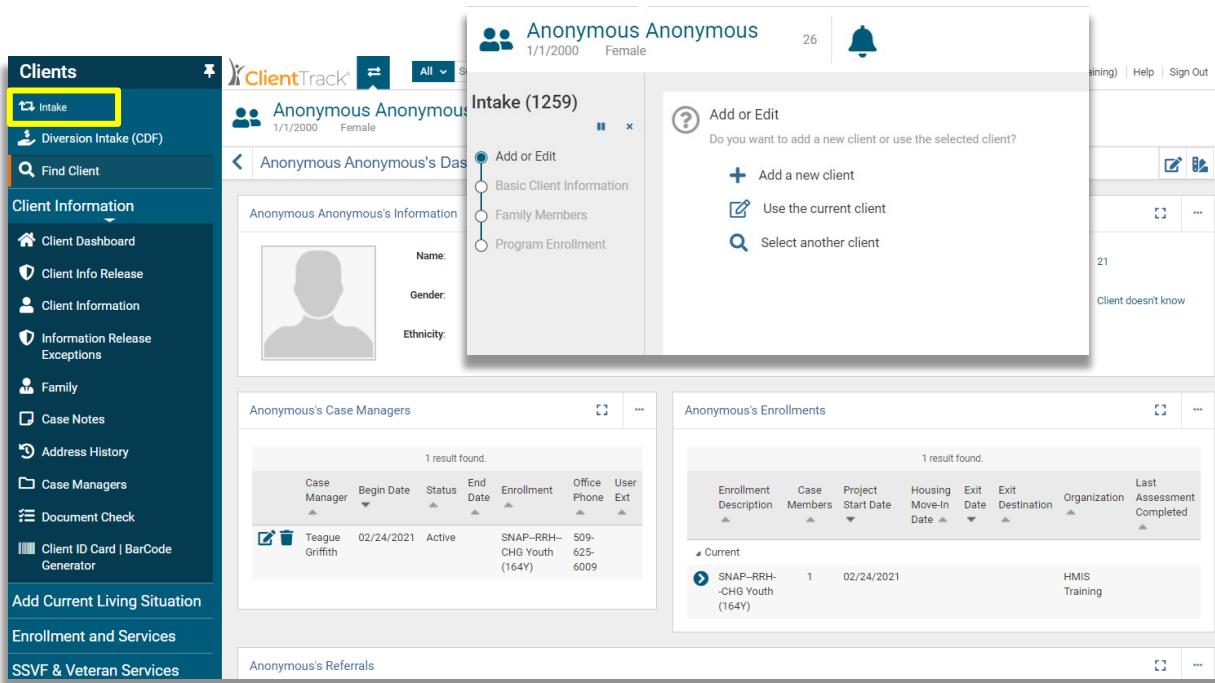
The image shows the ClientTrack dashboard for user Teague Griffith. A carousel overlay is active, displaying a client profile for 'Anonymous Anonymous' (DOB: 1/1/1983, Male, ID: 312). The carousel also shows a 'HOME' card for Daniel Ramos and a 'HOUSING' card for CC-ES-House of Charity Shelter. The main dashboard content includes a 'Current Program Enrollments' table and a bar chart.

Program	Cases	Clients
CC-ES-HOC Shelter	1	1
CC-ES-SMS Shelter	4	6
CC-ES-Warming Center	1	1
CC-RRH-WA0288-Rapid Rehousing	1	1
County-PSH-CBRA HARPS	1	1
FPS-ES-Open Doors	2	3
GI-HP-HEN Prevention	1	2
GI-HP-SSVF	1	2

The bar chart displays enrollment data for various programs, with the highest enrollment for CC-ES-SMS Shelter (6 clients).

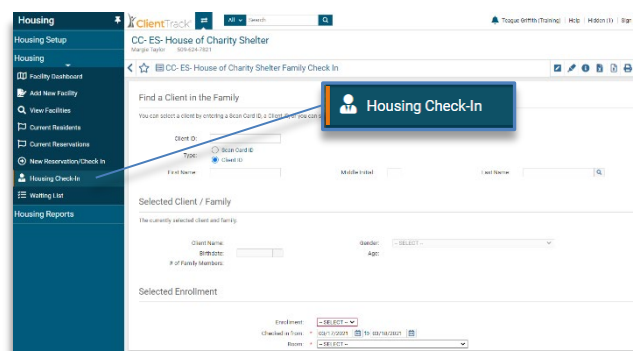
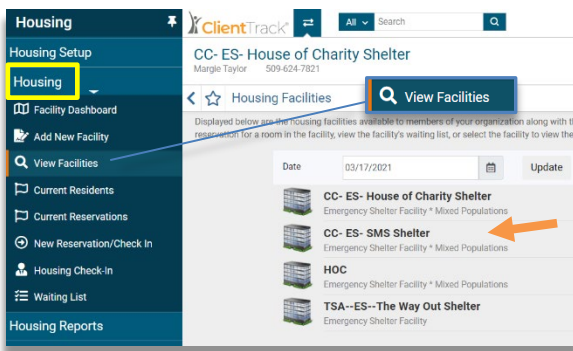
## Enroll the Client into the Project: Use the Workflow

Once you have entered the Clients Workspace click on the workflow icon to begin the enrollment and assessment(s) of the client into the project. You can either look-up the client using the find feature or you can create a new client. Follow each step in the workflow to complete the enrollment and assessment. The enrollment is necessary to complete a housing check-in.



## Navigate to the Housing Workspace & Family Check-In Form

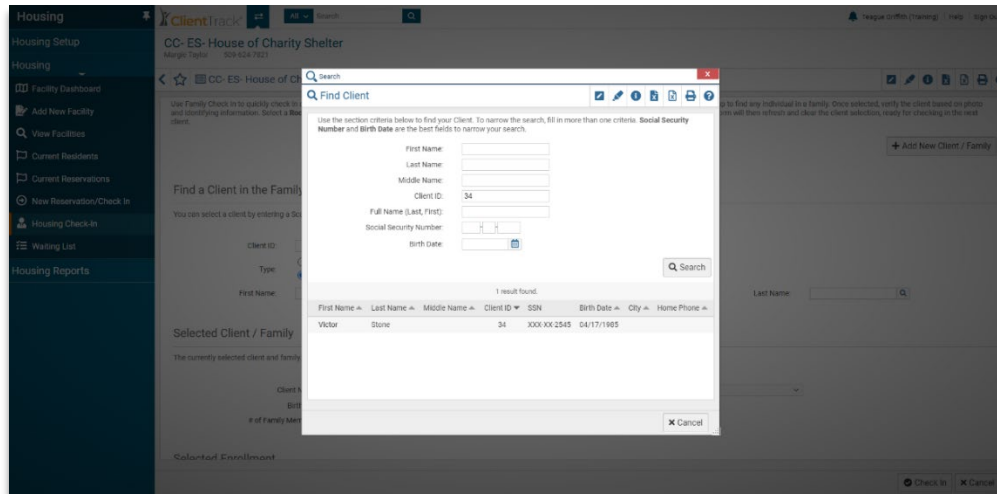
Once you enrolled the client in your project, navigate to the Housing Workspace using the carousel. Click on Housing in the left hand menu pane and select View Facilities. Click on your facility and then return to the menu pane and select Family Check In.



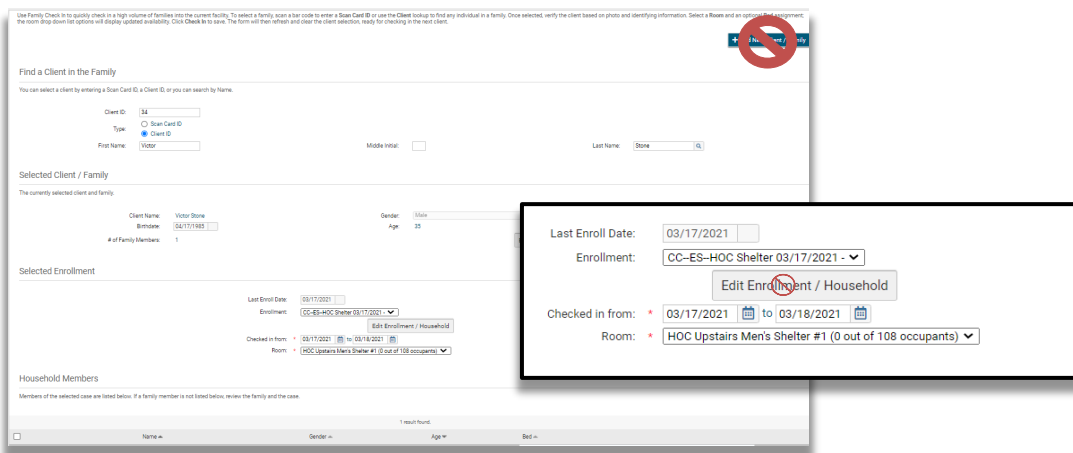
## Check-In the Client into the Facility

Please follow each step closely to ensure you do not accidentally create a second enrollment or get navigated back to the Client Workspace workflow. Do not type in the client name or ID and press enter in any of the fields, use the steps below.

Now that you are in the **Housing Check In** form, click on the magnifying glass next to the **Last Name** field. A client search form will pop-up, use the form to search your client by either their name or client ID. Select your client when it appears in the list. This will load your client into the Housing Check-in Form.



In the **Selected Enrollment** section of the form, locate the enrollment field (do not select *Edit Enrollment/ Household*). Select the shelter enrollment associated with the client. It should auto populate if your client is properly enrolled in the project.. Update the **Checked in from** field with the appropriate date. Select the appropriate **Room**. In the **Household Members** sections select your client by clicking on the box next to their name, and then select the appropriate bed assignment then click **Check In** to finish. Checking the client into the facility creates a “housing check-in” service entry that will posted to the client’s record.



Name	Gender	Age	Bed
Anonymous, Anonymous	Male	33	Bed 16 #16



## Verify the Check-In

You can verify the enrollment and most importantly, the check-in service by reviewing the client's dashboard to see that the service was posted.

The screenshot shows a client dashboard for 'Anonymous Anonymous's Information'. Key details include: Name: Anonymous, Anonymous; Birth Date: 1/1/1983; Age: 33; Gender: Male; Disabling Condition: No; Veteran: No; Race: Asian. Below this, 'Anonymous's Case Managers' shows Daniel Ramos as the active case manager for 'CC-ES-HOC Shelter' starting on 08/30/2016. 'Anonymous's Referrals' and 'Anonymous's Services' sections both show a 'Housing Check-In' service on 08/29/2016 at 'CC - House of Charity'.

## How to Run the Barcode Check In Roster

You can run a report of individuals checked into your facility for any given night. Navigate to the Housing Workspace and in the Housing Reports menu select **Barcode Check In Roster**. Select the appropriate housing facility and select all the rooms. You can select all the rooms by clicking on the green check mark next to the **Rooms** field. Enter in the date you want to run the report and select *Client ID* as the **Bar Code Type**. Click **Report** to run it and use the PDF or Excel buttons in the report viewer to save, print or export it.

The screenshot shows the 'Barcode Check In Roster' configuration screen. The 'Housing Facility' dropdown is set to 'CC-ES- House of Charity Shelter'. The 'Room(s)' dropdown is set to '(No Desc) #84', '(No Desc) #85', '(No Desc) #86', '(No Desc) #87', and '(No Desc) #88'. The 'Begin Date' field is empty. The 'Bar Code Type' is set to 'Client ID'. The 'Show Picture' option is set to 'Yes'. The 'Column Names' section shows: Column 1 Name: Bed, Column 2 Name: A, Column 3 Name: B, Column 4 Name: C, Column 5 Name: D. A callout box highlights the 'Housing Facility' and 'Room(s)' dropdowns.