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| **KHLogo** | **SPE Call Center Workflow** | **(REV 07/13/2018)** |

**Note: *Family Waitlist Workflow is at the bottom of the document***

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| **Search For Client** |
| 1. Log On To ServicePoint
2. EDA: SPE Call Center
3. Click on ClientPoint Module
4. Search for Client by first and last name
5. ***If Client has an existing HMIS Record, proceed to the ROI Tab***
6. If not found, fill in NDQ, SS#, SS#DQ & Vet Status, then …
7. Click on “Add New Client With This Information”
8. Click on either “Add Client Only” or “Add Client and Add NEW Household” (if working with a family, you MUST click on the latter)
9. Click OK to “Continue with New Client” Prompt

**If adding a new household:**1. Set “Household Type” at top of window
2. After adding the record, continue to Search and Add other family Members
3. As they are added, they will be listed in the “Selected Clients” List at the bottom of window
4. When finished adding family members, click “Continue”
5. Adjust the “Head of Household” and “Relationship to Head of Household”
6. Click Save and Exit
7. Proceed to “ROI TAB”
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| **ROI Tab** |
| 1. Click ROI Tab and click the “Add Release of Information” button
2. If there is a Household, check all boxes for all family members
3. Release Granted “Yes” or “No”
4. Set End date for 1 years out
5. Choose Documentation Type. *Note: if client is a caller, read the designated ROI Call Center Release form, in signature line of paper copy write “Verbal” and write the client’s HMIS # on it.*
6. Witness it
7. Click on “Save Release of Information”
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| **Entry/Exit Tab** |
| 1. Click on Add Entry/Exit
2. Select Family Members if it applies
3. Set “Type” to: **HUD**
4. Click “Save & Continue
5. Complete “Louisville CoC & ESG Entry” Assessment for Individuals (answer ALL questions and complete the HUD Verification; verify that HUD Verifications have green checkmarks)
6. Click “Save & Exit
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| **If Photo ID Card is needed** |
| 1. Click on “Service Transaction” Tab
2. Click on “Add Multiple Service” button
3. Include additional household members if necessary (click on check boxes)
4. Leave “Number of Services=1” as is
5. Select “Service Type” = Identification Cards
6. Click “Save & Continue” button
7. Scroll to bottom of the page
8. Set “Need Status” = “Closed” (this is important)
9. Outcome of Need = “Fully Met”, then click on “Save & Exit”
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| **If Bed is NOT Available** |
| 1. Remain on the Services Tab
2. Click “Add Another” at the bottom right of the screen to add a second service
3. Set “Service Type” to “Emergency Shelter (BH-1800)
4. “Need Status” = “Closed”
5. “**Outcome of Need” = “Not Met”**
6. **“If Need is Not Met, Reason”= “All Services Full”**
7. Click Save and Exit

***NOTE: This is how we capture Unmet Need*****Exit Client:**1. Click on Entry/Exit Tab
2. Click on pencil icon for “Exit Date”
3. Click on Checkboxes to choose family members
4. Reason for Leaving= Completed Step
5. Set Destination for whatever applies
6. Click Save and Continue
7. Scroll to bottom and click “Exit”

**If Family needs to be put on Waitlist, see Waitlist Workflow below** |
| **If Bed is Available** |
| **Exit Client From Call Center Project:**1. Click on Entry/Exit Tab
2. Click on pencil icon for “Exit Date”
3. Reason for Leaving= Completed Step
4. Set Destination for whatever applies
5. Click Save and Continue
6. Scroll to bottom and click “Exit”

**Create Reservation for Emergency Shelter** (example: SPE Wayside Mens)1. Click on “ShelterPoint”
2. Change **Provider** to appropriate Shelter Project
3. Click “Check In Reservation”
4. Towards bottom of the page, click the “Add Reservation” button
5. Search for client’s name then enter their HMIS ID
6. Click on “green plus-sign” icon to the left of the name to select
7. **Pay attention to any Incidents that may be listed**
8. On “Unit Reservation Data” window click “Save”; client now has a reservation
9. To delete reservation, click on the trash can icon on the “Reservation For Unit List”
10. Exit or Return to ShelterPoint Dashboard
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| **KHLogo** | **SPE Waitlist Families Workflow** | **(REV 12/19/2014)** |

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| **Add Family to Waitlist** |
| 1. Click on ShelterPoint Module
2. Change Provider to: SPE Waitlist Families (2183)
3. Click “Check Client In”
4. Click on “Empty” in the Client Column and select relevant prioritized bed/slot
5. Search for Client/Head of Household by first and last name
6. Click on “green plus-sign” icon to the left of client’s name to select
7. In “Codes/Notes” section (top of page), enter Priority and if they are a sex offender
8. Do not check boxes for other family members (this would specify a bed for each member)
9. Review and/or Answer all questions on “Louisville SPE Family Waitlist” Assessment (should already be answered if you followed the above workflow)
10. At bottom of the page, enter any necessary information (how many family members, sex and age of children, are they being evicted, domestic violence issues, phone number, where they are currently staying, etc…) in the “Notes” section (different than “Codes/Notes” at the top of the screen)
11. Save & Exit
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