STEP BY STEP INSTRUCTIONS for the BED REGISTER:

1. Sign on to http://hmis.housingworks.net

    Username: _____   Password _____

    Quick Reports ◄
    Stored Reports ◄
    Bed Register

2. Click the link: "Bed Register" (in the left hand menu)

3. **Take all these steps to properly exit a guest, in order**: Look to the *light bulb* to see if any clients need to be exited. This section indicates that clients need to be exited. This exiting work is your highest priority and must be addressed before you enter any more clients into the Bed Register.

    💡 You have 2 client(s) who have not exited your program, but have not occupied a bed in 30 days or more. Please use the "Bed Register Lapsed" tab on the Exit Individuals Wizard to exit these people ⬅

    1. **Open the Bed Register and check all the guest's Bed Dates**: exit the client any time there is a 30 day gap.
    2. **Important**: the exit date must be 24 hours AFTER the last bed night: if the client last slept in a bed on Oct 3, then the Exit Date must be Oct 4 (the next day).
    3. **Click the client's name in the Bed Register Lapsed to see who needs exiting. Print out this list immediately! In step 6, you will begin clicking each name to start the "Exit Wizard"**
    4. **Review the client's ENTRY ASSESSMENT answers before clicking a guest's name in the Bed Lapsed list!** The clients' cash and benefit answers may change, but his/her health conditions should ALWAYS be the same: If he had drug use, HIV, and mental health problems at ENTRY, he must have those same conditions at EXIT.
    5. **The Exit Wizard is a two-page process**. Finish it completely before doing any other work. And never exit the person through any other method!

4. **Once you've exited all the "lapsed" clients**, return to the Bed Register and use the right side of the page to enter more new clients into a bed. To use this section, type a date, a client's name (it should auto-complete), and part of a Bed name (it should also auto-complete). Once these three fields are complete, click the "Save and Create Another" button.

    How to enter the dates on the page (different)
    - Type the date in the left-hand half of the page like this: 2010-10-02
    (then hit the related "Apply" Button)

    - Type the date in the right-hand half of the page like this: 10/02/2010
    (then hit the related "Save and Create Another" Button)

    How to enter part of a bed name:
    - try "1B" for M1B
    - try: "W1" for Women's bed 1
    - try: "DR" or "11" for Dining Room pad 11

Efficiency: The most efficient strategy is for you to enter all the clients for <u>one night</u>, rather than try to enter different nights for <u>one client</u>: *until you change it, the date remains the same, so that you can enter all the clients for a single night without having to retype that same date over and over.*

Obstacles: If the client's name doesn't 'auto-complete', or if pushing the button "Save and Create Another" produces a message saying the client is not current enrolled, you'll have to leave the Bed Register page by clicking the <u>Entry Wizard</u> in the left-hand menu. In other words, you must create a new <u>Entry Record</u> for this client before you use to the Bed Register. *The reason you have to create a new Entry Record: the client's circumstances may have changed while the client was gone from your program.* Creating an additional Entry Record lets you provide a new Intake Date for the client, as well as providing possibly different answers to the questions about *Living Situation just Prior to Entry, Health Conditions at Entry, Income Sources at Entry,* and *Benefits at Entry.*

If you want to see a history of your work, use the left side of the Bed Register page.

The most current entries show as the default. To check on a particular date, client, or bed, complete one or more of the filters shown. For instance, you can see the history of a bed: who's been sleeping in that bed? This picture show you Bed "A" in the Women's room, and it looks like someone slept in that Bed in April and then the bed was empty until October (this bed is apparently a *seasonal* bed).

And, you can see that someone accidentally assigned Jane Smith THREE TIMES on April 15th to Bed "A" in the Women's Room. This needs to be corrected. Also you can see that the very next time anyone slept in that bed was Oct, and that it was the same person who slept there in April. This is probably a *seasonal bed*.

Bed Register

Room/Bed: Women / A ⇕   **Name:** _____

Date _____   (Apply)

Format: 2009-11-02

Date ▲	Room/Bed	First	Last	SSN (last 4)	Year Born	Edit
04/14/2009	W-A	Jane	Smith	4539	1955	edit
04/15/2009	W-A	Jane	Smith	4539	1955	edit
04/15/2009	W-A	Jane	Smith	4539	1955	edit
04/15/2009	W-A	Jane	Smith	4539	1955	edit
04/16/2009	W-A	Jane	Smith	4539	1955	edit
10/05/2009	W-A	Jane	Smith	4539	1955	edit
10/05/2009	W-A	Jane	Smith	4539	1955	edit
10/06/2009	W-A	Jane	Smith	4539	1955	edit
10/12/2009	W-A	Jane	Smith	4539	1955	edit

BED REGISTER – PROBLEMS THAT MAY OCCUR

PROBLEM ONE: Client has an Entry Wizard but no listings in the Bed Register. The initial entry was not complete! Because *Exit data* was entered in the *Entry/Exit* page, you will not now be able to add the person to the Bed Register. *(The bed register doesn't let you enter data for a client who has exited already.)*

SOLUTION: *Visit the Entry/Exit page and erase ALL the Exit Data for that client. Don't do a partial erasure as in the picture below!*
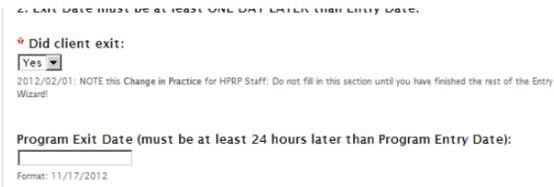
*Once the Exit data has been erase, you will be able to enter the client into the bed register. Once the Bed Register is complete, visit the **Bed Register Lapsed page** and do the Exit Wizard: you will essentially be re-entering data you just erased, but now all pages are in agreement about the client's visit.*

PROBLEM TWO: Client has **several entry records** but **was never exited from previous visits** (see picture below.)

Smith, John (xxx-xx-4438)	Entry: 4/11/2011	Exit: **exit data missing**
Smith, John (xxx-xx-4438)	Entry: 5/13/2012	Exit: **exit data missing**
Smith, John (xxx-xx-4438)	Entry: 10/03/2012	Exit: **may or may not still be present**

You should have exited them when they hadn't used a bed in 30 days. **Because they weren't exited in a timely fashion, you will now have trouble exiting them at all!** - the "Bed Register Lapsed" Wizard may get confused.

- The client's **Exit Page** and the **Exit Assessment may not get completed.**
- You may see some garbled programming code at the top of the page when you are trying to exit this client:

SOLUTION: You must call HousingWorks to clean this up.
To avoid this problem future, you <u>must</u> stay current with your work.

Open five windows in two browsers:
In I.E. open: the **Bed Register**; and
the **Exit Wizard/All**.
In Google Chrome, open: **Clients: Merge/Clean/Filter/Delete Admin**;
the **Bed Register** – a second window
one extra page to create *Extra Assessments* from the **Favorites**

*Bed Register set up in I.E. (left side of monitor)**: In the *Bed Occupancy Table* on the left,** erase the default *exit date*, then enter a client name; this will allow you to see all the bed nights for that client. <u>Look for 30 day gaps</u>, and write down the main program entry and exit dates – which are determined by those 30 day gaps

Clients: Merge/Clean/Filter/Delete set up in Google Chrome (right side of monitor): **Enter a client name**. Compare the bed register dates in the IE window with the Entry/Exit Records. Sort by Record Type so that all Assessments are together, all Entries, all Services, etc. Look for these kinds of problems:

- Record days Client exited but an Exit Date may be missing:
  Change the "Yes" answer to "No", save the page, and do the Bed Register Lapsed wizard.

- an Exit Assessment may be missing. *You can see on the right that the client has two Entries, but no Exit Assessment for the first visit.*

*Go the Exit Wizard/All Page (not the **Bed Register Lapsed** page) to see if the client name appears twice.*

If the client name doesn't show multiple time but he did have multiple visits without an Exit Assessment, you need to now go to the **Client: Merge/Clean/Filter/ Delete** admin page and click the "Edit" link by each **Entry/Exit Record**. Check to see if the record looks like this picture. Having a *Yes* answer here prevents the client from showing up in the Exit wizard. So change the "Yes" answer to "No", save the page, and then return to the **Exit Wizard/All** page to exit the visit. Note: be sure you are on the **Exit Wizard/All** page and not the **Exit Wizard/Bed Register Lapsed** page! The exit date you use when answering questions must be related to the correct visit, and this may not be the last night the client slept in the program (which may be for a later visit)!
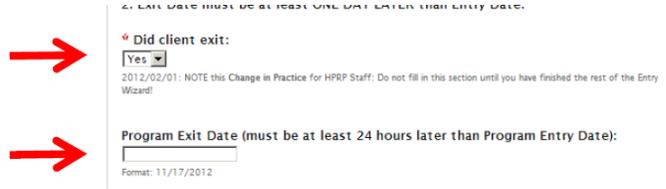
PROBLEM TWO-A: In the Bed Register, the client is mistakenly entered **twice on the same night**. This is an easy fix.
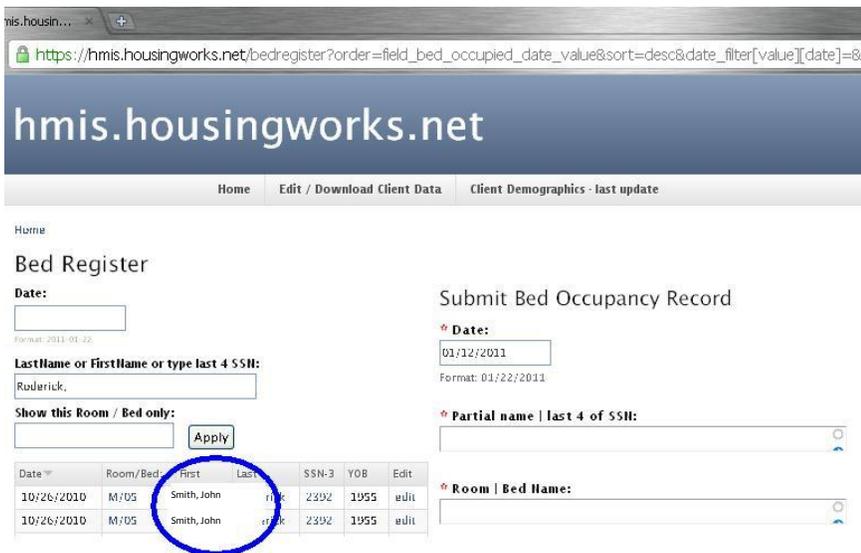
SOLUTION: Go to the **Bed Register page** and delete the duplicate stay by hitting the "edit" link at the right. If you are not able to delete a client this way, it is be asue they already have an exit date listed for that visit. In that case, do the next set of steps in Problem Two-B below.

PROBLEM TWO-B: Inthe Clients: Merge | Clean | Filter, the client is mistakenly entered **twice with same set of Entry/Exit dates.**

SOLUTION:
- Download excel from Entry Page. Open the excel and sort by col B (name) to

locate the problem entries

- Open three browser windows:
  1. **Go to the menu item**: "**Clients: Merge | Clean | Filter**"
  2. **Exit tab of Worksheet**
  3. **Bed Register** webpage

- Using the **Exit tab**. Using the 'last name, first name' filter (and not the 'PIN' filter) , remove exit info where dates are wrong.
- Then go to the **Bed Register page** and delete the duplicate stay. (You won't be able to takje this step unless the exit date is erased or corrected in the previous step.)

PROBLEM THREE: Client is missing an entry record. Or rather, it's there but is invisible or unattached. See picture below, where there is a ClientID, a Service and an Assessment but no entry record.

Probably the most common reason

for this problem is, *y*ou created a duplicate clientID; then, at some point, HW staff located this and deleted the duplicate client IDs. As a consequence, the *Entry* record attached to that deleted clientID gets '*orphaned*', and becomes invisible.

SOLUTION:

1. Go to the menu item "Clients: Merge | Clean | Filter".

2. Use the client's name to locate it (not the HIN or PIN filters). Click edit, and just save the page to re-attach it.