



Suffolk County Department of Social Services Shelter Online Attendance Reporting Instruction Manual

Requirements needed to process attendance online:

Hardware: Computer, Internet Access capability

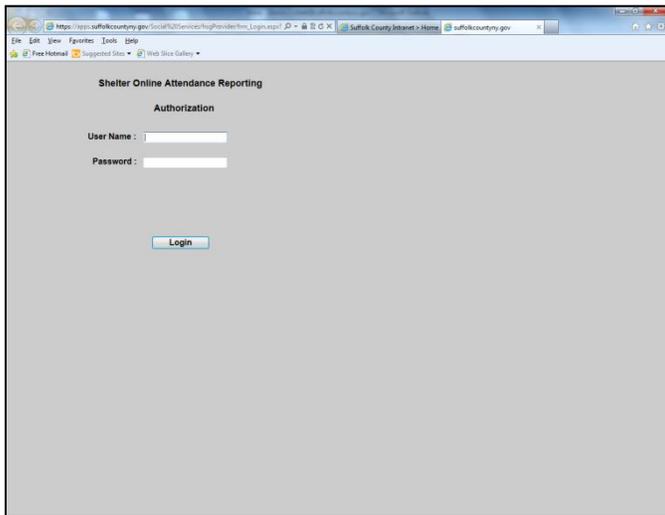
Software: Windows 7 OS w 2 gb RAM minimum, Internet Explorer browser version 9, 10 or 11

Internet Explorer link to application:

https://apps.suffolkcountyny.gov/social_services/hsgProvider/ShelterOnlineAttendanceReporting.aspx

Once the link opens in Internet Explorer, make a shortcut and place it on your desktop. The shortcut address may need to be edited for forms authentication once it is on the computer desktop. To do this, follow the instructions in either the "How to Create the SOAR Production Shortcut" or the "How to Create the SOAR Training Area Shortcut" document.

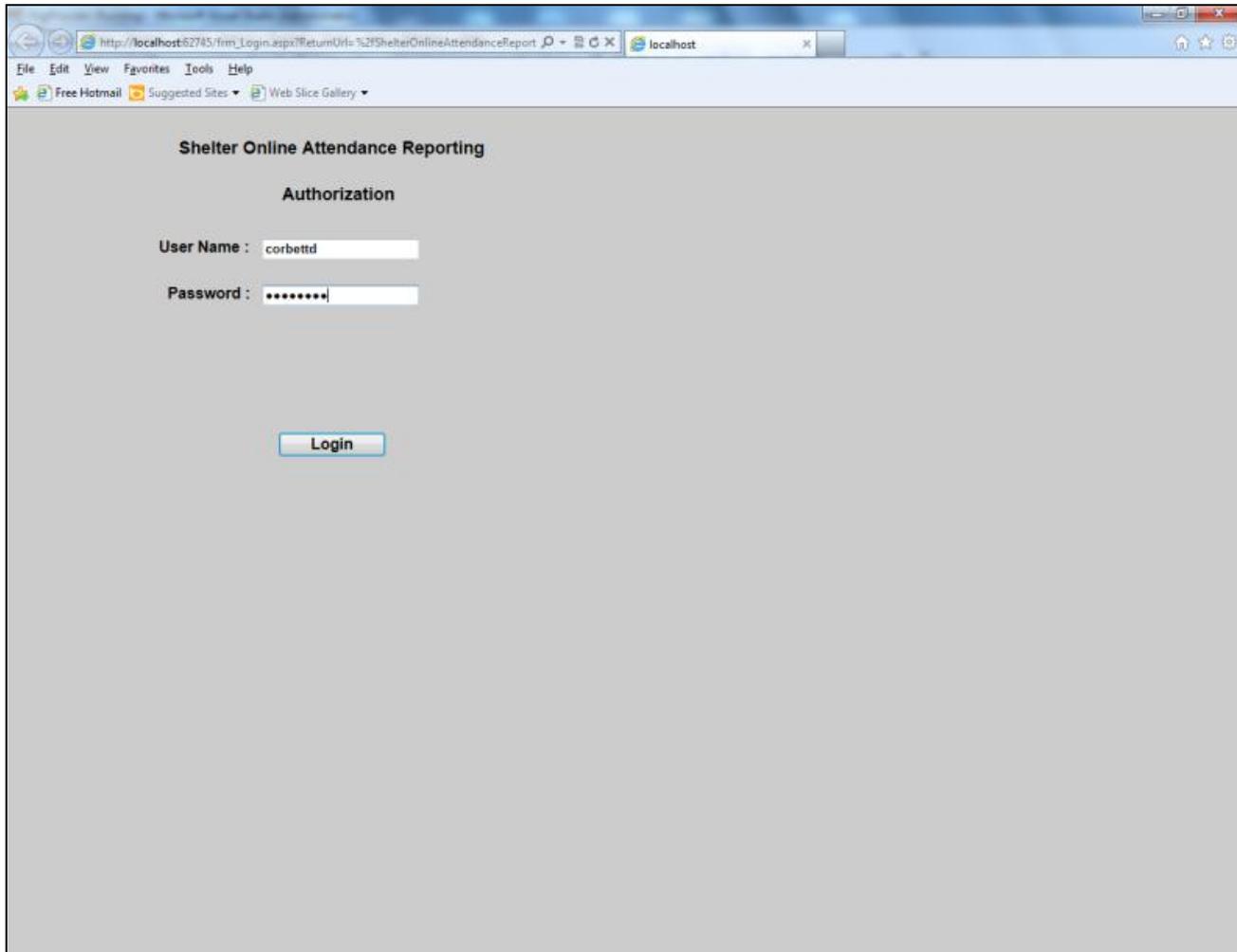
Log in screen will appear.



Enter User Name assigned to you by Suffolk County Department of Social Services. The first time signing into the application, you will use the default password provided at training, enter the default password and you will then be asked to create your own password. Follow directions on the screen.

Functionality Changes For Providers As of February 28, 2015:

- **Facility Selection:** Once user logs in and creates their new password , they will select a facility from the drop down at left side at top of page (this is a new feature for Single Sign-On functionality) and select the attendance date and edit/update each attendance record then submit the attendance and room availability – as usual. If you are submitting attendance for multiple facilities within your Organization, you no longer have to login with a separate userid for each facility in the organization.
- Ability to print a currently or previously submitted attendance date report from a command button named **"Print by Att. Day"**. It will provide the opportunity to save a text file to the user's computer - Details are in the instruction manual.



Passwords require: one capital letter, one number and must be 8 – 12 characters in length total. Once you create your own password, you will then use it to log in to application again. Passwords will expire every 90 days. Note: Cannot use same password consecutively. If you enter your userid/password incorrectly 4 times, it will lock you out and you will need to call:

631-854-9524 8:00AM – 4:00PM Monday-Friday

631-854-9518 8:30AM – 4:30PM Monday-Friday

631-854-9160 – Before 8AM, Evenings after 4:30PM, Weekends, Holidays

Approved times to log in and track attendance: 4:30 pm each day until 8:45 am of the following day. Submit time for attendance is 5:00 am until 8:45 am of the attendance day.

Note: Password creation is only available from 4:30 pm until 8:45 am each attendance day.

Note: After logging into the Shelter Online Attendance Reporting Application, the application will log you out automatically after 40 minutes of inactivity. This will require logging back in with your user id and password.

Once logged into the application, following screen appears with user name and facility name:

Shelter Online Attendance Reporting
Client Attendance / Room Availability

Facility: Select Attendance Date: Get Submit Date Refresh Attend/Room Info

User: Dennis Corbett Help / Glossary

Org: Community Housing Innovations Inc.1 Note: for those in continuous placement, mark arrival time at 6AM

Client Attendance * Placements marked as ES or Extended date may be discharged

Adults Children

Last Name Case Number Clear Search Text Client Search

Room Availability No Rooms Available

1 Bed Add

Comments

** No Rooms Found ** To Add above - select type, enter quantity, click add button

Save Submit Print By Att. Day

Note: If you do attendance for multiple facilities within your organization, you no longer are required to login with a separate userid for each facility. Select your facility, update the records, submit attendance and then select the next facility from the dropdown list and follow same procedure for each facility.

Shelter Online Attendance Reporting
Client Attendance / Room Availability

Facility: CHI Koren Lane Attendance Date: 02/25/2015

User: Dennis Corbett [Help / Glossary](#)

Org: Community Housing Innovations Inc.1 Note: for those in continuous placement, mark arrival time at 6AM

Client Attendance * Placements marked as ES or Extended date may be discharged

Case Last	Case First	Case Number	Rm Num	Adults	Children	ES	Ext Date	Status	Arrival/Attendance Date/Time	Did Not Stay	DNS Left Date/Time	Discharge Reason
C.		P00D	1	0		N				<input type="checkbox"/>		Edit
Co.		P00G	1	0		N				<input type="checkbox"/>		Edit
D.		P00G	1	1		Y	02/28/2015			<input type="checkbox"/>		Edit
D.		P00I	1	0		N				<input type="checkbox"/>		Edit
D.		P00I	1	0		N				<input type="checkbox"/>		Edit
D.		P00A	1	0		N				<input type="checkbox"/>		Edit
D.		P00A	1	0		N				<input type="checkbox"/>		Edit
D.		P00C	1	0		N				<input type="checkbox"/>		Edit

Adults: Children:

Last Name: Case Number:

Room Availability No Rooms Available

Comments

“Attendance Date”:

Select today’s attendance date by clicking the **Get Submit Date** command button. This will open up a date picker/calendar (see below.) Select attendance date from the calendar by clicking on a date. Note: If you are overnight staff (those working 4 pm– 12 am) and you are entering client attendance – you will need to select the next day as attendance date not the current day). Note: Attendance must be submitted each and every morning for the previous day.

Date Picker - Windows Internet Explorer

July 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Hour: Minutes: AM/PM:

For example, if you are working 4 pm – 12 am on Monday, Jan 6th and you are tasked with updating attendance records, you would select Tuesday, Jan 7th as the attendance date. If you are working 12 am – 8 am or 8 am – 4 pm and are tasked with updating/submitting the attendance, you would always select the current date as the attendance date.

Once the attendance date has been selected, screen will then populate with current clients placed at the facility.

C...	P00D	1	0	N		Edit
C...	P00C	1	0	N		Edit
D...	P00G	1	1	Y	02/28/2015	Edit
D...	P00K	1	0	N		Edit
D...	P00L	1	0	N		Edit
D...	P00M	1	0	N		Edit
D...	P00A	1	0	N		Edit
D...	P00E	1	0	N		Edit

Adults 8 Children 1 **New**

Last Name _____ Case Number _____ Clear Search Text Client Search

Room Availability No Rooms Available

1 Bed [] Add

Comments

** No Rooms Found ** To Add above - select type, enter quantity, click add button

Save Submit Print By Att. Day

All of the attendance day's current placements will appear in case last name order. **Note:** if there are more than 10 clients at the facility, a *page indicator* appears in the lower right corner of the Client Attendance grid. Click on the page number to advance through the pages. Once the attendance records have populated on the screen, you are ready to do attendance.

[Edit](#)

[Edit](#)

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Page Indicator

Note- New Fields **Adults** and **Children** contain the total number of each for the cases staying at the facility.

How To Report Attendance: To update Status for each client. Click on the **Edit** button to allow editing the client record. The following fields can be edited: Status, Arrival Date/Time, Did Not Stay, DNS Left Date/Time, Discharge Reason.

C...	P00D	1	0	N		Edit
C...	P00C	1	0	N		Edit
D...	P00G	1	1	Y	02/28/2015	Edit
D...	P00K	1	0	N		Edit
D...	P00L	1	0	N		Edit
D...	P00M	1	0	N		Edit
D...	P00A	1	0	N		Edit
D...	P00C	1	0	N		Edit

Adults Children

Last Name Case Number

Room Availability No Rooms Available

Comments

** No Rooms Found ** To Add above - select type, enter quantity, click add button

Enter **Status** – select “Arrived” or “Did Not Arrive” from the drop down list. If status is “Arrived”, enter Arrival Date/Time– click on the **Date** Button in the Arrival Date/Time column and select the date/time client arrived*; after entering date and time information, click the **Done** button in the calendar. Select Discharge Reason of “Not Discharged”.

*For example, if client “Arrived”: select “**Arrived**” from the Status dropdown list; next, enter the client arrival date/time anywhere between 6:00 am Dec 9th until 5:59 am Dec 10th for the “attendance date” of: Dec 10th. Select discharge reason of “Not Discharged”. If client did not arrive, select the status of “Did Not Arrive” and no additional information needs to be entered. The discharge reason “Whereabouts Unknown” will be automatically selected.

If client “Did Not Stay” – click the “**Did Not Stay**” checkbox and click the **Date** button under the Left Date/Time column to indicate the date/time client departed from the facility. Select an appropriate discharge reason.

Case Last	Case First	Case Number	Rm Num	Adults	Children	ES	Ext Date	Status	Arrival/Attendance Date/Time	Did Not Stay	DNS Left Date/Time	Discharge Reason
[Redacted]	[Redacted]	[Redacted]	1	0	N			Arrived	07/21/2014 10:27:00 PM	<input type="checkbox"/>		Not Discharged *
[Redacted]	[Redacted]	[Redacted]	1	0	N			Arrived	07/21/2014 3:28:00 PM	<input checked="" type="checkbox"/>	07/22/2014 1:26:00 AM	Inappropriate Behavior
[Redacted]	[Redacted]	[Redacted]	1	1	N			Did not arrive	<input type="text" value="Date"/>	<input type="checkbox"/>	<input type="text" value="Date"/>	

Update
Cancel

After editing each individual client record, click the **Update** button. When done editing records, room availability or the comment field - you must click the yellow **Save** button which is located toward bottom of screen.



Shelter Online Attendance Reporting
Client Attendance / Room Availability

Attendance Date : 01/07/2014 Get Date Refresh Attend/Room Info

User Dennis Corbett [Help / Glossary](#)

Facility Peconic Hgts Note: for those in continuous placement, mark arrival time at 6AM

Client Attendance * Placements marked as ES or Extended date may be discharged

Case Last	Case First	Case Number	Rm Num	Adults	Children	ES	Ext Date	Status	Arrival/Attendance Date/Time	Did Not Stay	DNS Left Date/Time	Discharge Reason
S	B	P00	1	0	N			Arrived	01/06/2014 5:27:00 PM	<input type="checkbox"/>		Not Discharged * Edit
T	J	P00	1	2	N					<input type="checkbox"/>		Edit

Last Name Case Number

Available Rooms No Rooms Available

1 Bed

Comments
test comments 1/7/2014

** No Rooms Found ** To Add above - select type, enter quantity, click add button

Message from webpage

1 Attendance records have not been updated. Please update attendance and resubmit

If you forget to update an attendance record and try to then submit the attendance, you will receive an error message alerting that a client record needs to be updated. All client records need updating in order to submit the information successfully.

Shelter Online Attendance Reporting
Client Attendance / Room Availability

Attendance Date : 01/07/2014

User Dennis Corbett [Help / Glossary](#)

Facility Peconic Hgts Note: for those in continuous placement, mark arrival time at 6AM

Client Attendance * Placements marked as ES or Extended date may be discharged

Case Last	Case First	Case Number	Rm Num	Adults	Children	ES	Ext Date	Status	Arrival/Attendance Date/Time	Did Not Stay	DNS Left Date/Time	Discharge Reason
S	B	P00	1	0		N		Arrived	01/06/2014 5:27:00 PM	<input type="checkbox"/>		Not Discharged * Edit
T	J	P00	1	2		N				<input type="checkbox"/>		Edit

Message from webpage

 1 Attendance records have not been updated. Please update attendance and resubmit

Last Name Case Number

Available Rooms No Rooms Available

1 Bed

Comments

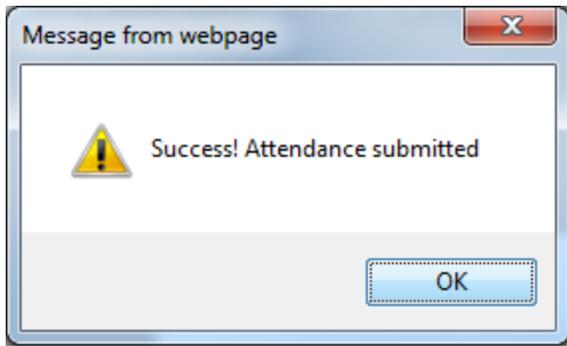
test comments 1/7/2014

** No Rooms Found ** To Add above - select type, enter quantity, click add button

9:56 AM 01/07/2014

Once all clients have had their attendance recorded and the room availability/unavailability noted, the information is ready to be submitted. Click the red **Submit** button to submit attendance to the DSS Emergency Housing Placement Unit.*





You will receive a message letting you know the attendance has been submitted successfully. ***Note:** Attendance can only be submitted between the hours of 5:00 am and 8:15 am on Attendance Reporting Date.

Glossary – description of various fields and command buttons on the attendance form

Edit - must be clicked to allow entering information into fields for each record.

Update – must click after “editing” each record.

Save – click when done editing records on the screen. This transmits the attendance information to our database.

Status – client would either have “Arrived” or “Did Not Arrive”

Did Not Stay - If client arrived but did not stay overnight, indicate this by clicking the **Did Not Stay** check box. This will automatically “discharge” the client. Enter the Date/Time client left facility. Note: There is no need to select a discharge reason if the client has the Did Not Stay checkbox filled in.

Arrival Date/Time – used when client arrived at facility.

DNS Left Date/Time – used when client did not stay at the facility to indicate date/time departed.

Discharge Reason - “Not Discharged” is selected if the client arrived and stayed the night. If you wish to alert the Housing Placement Unit to some problem that occurred during the placement (i.e., drugs/alcohol or police involved/arrested). Select a Discharge Reason – the client will be discharged from that particular placement and will show the reason for discharge that you selected from the dropdown list. This information is then available to the Housing Placement Unit and notifies them that you do not want this particular client’s placement to continue at your facility.

Available Rooms grid starts with a default of room type as “1 Bed” and the # of rooms field blank. The availability grid will enlarge as you add available room types located at your facility. Once a room type is selected, enter the # available in the text box next to the room type and click the Add button. This information can be edited or deleted as needed. If there are no rooms available at the facility, please check the box “No Rooms Available”. Note: Room availability is submitted once each morning along with the attendance information. Please call the DSS EH Placement Unit to alert them if room availability changes after submitting the day’s attendance information each morning.

Comment Field - is used to indicate any important information about the facility itself that you wish to communicate to the Social Services Housing Placement Unit.

Client Search – useful if there are multiple pages of clients listed. Enter the client last name or case # and click Client Search. To clear the search field(s) and search for a different client/case #, click on **Clear Search Text** and then enter different search criteria and click Client Search. This will take you to the page where client record is located.

Submit - Attendance can only be submitted once each day (between the hours of 5:00 am – 8:45 am.) Please allow enough time to enter the attendance before the 8:45 am cutoff.

Discharge Reasons:

Reason	Description
Case Denied	agency denied case, no longer eligible for temporary housing
Curfew Violation	client violated shelter curfew
Deceased Client	client is deceased
Decertified By DSS	agency decertified client/family no longer eligible for temporary housing
Destruction of Property	client destroyed shelter property, violating shelter rules
Domestic Violence	client was aggressor in a domestic violence incident at shelter
Drugs / Alcohol	client violated shelter drug/alcohol policy
Health / Safety	client involved in dangerous or unsafe behavior in violation of shelter rules
Inappropriate Behavior	client engaged in other inappropriate behavior, violation of shelter rules
Non-pmt of Shelter Oblig.	client failed to pay their the shelter obligation
Other Shelter Rule Violation	client violated shelter rules not listed above
Police Involvement / Client Arrested	client arrested and no longer at shelter
Sanction	agency sanctioned client no longer eligible for temporary housing
Self-Discharged-Family	everyone in family or single at shelter left the shelter to live with family
Self-Discharged-Ind. Family Mem.	one member of household left the shelter
Transfer to Another Shelter	agency transferred client to another shelter
Unauthorized Absence	client left shelter for evening and then returned, in violation of ILP
Unsupervised Children	client failed to supervise their children, in violation of shelter rules
Violence / Threats	client threatened or used violence toward shelter staff or another individual at shelter
Weapon Possession	client was in the possession of a weapon, violating shelter rules
Whereabouts Unknown	client's current address is not known, no longer at shelter
Will Not Sign ILP/Shelter rules	client arrived and was required to sign an ILP and has refused to sign

NOTE: If client has discharged to Permanent Housing – select “Self-Discharged-Family” or “Self-Discharged-Ind.Family Mem. as the discharge reason.

Online Attendance Recording Matrix

Scenario	Description	Status Selection	Status Date	Did Not Stay Checkbox	Did Not Stay Left Time/Date	Discharge Reason	Discharged from Placement Database	
1	Client arrived and stayed the night	Arrived	Enter the date/time arrived	Unchecked	Leave Blank	Not Discharged	No - <i>unless they are ES</i>	
2	Client arrived and stayed the night but will not be returning or provider prefers they not be placed another night at their facility.	Arrived	Enter the date/time arrived	Unchecked	Leave Blank	Select the Appropriate Discharge Reason which then appears in the Placement Database	Yes	
3	Client Arrived but did not stay the entire night for some reason.	Arrived	Enter the date/time arrived	Checked	Enter the date/time client left the facility	Select the Appropriate Discharge Reason which then appears in the Placement Database	Yes	
4	Client Did Not Arrive	Did Not Arrive	Leave Blank	Leave Blank	Leave Blank	Leave Blank - Defaults to "Whereabouts Unknown" in the Placement Database	Yes	
5	Client is at your facility but is not listed on the screen or client is listed on the screen but no longer at your facility	Call DSS (see telephone numbers below)						

For userid/password maintenance/client roster issues, please contact DSS:

8:00AM – 4:00PM 631-854-9524 Monday – Friday
 8:30AM – 4:30PM 631-854-9518 Monday – Friday
Before 8AM, Evenings after 4:30PM, Weekends, Holidays 631-854-9160

New reporting feature added to SOAR:

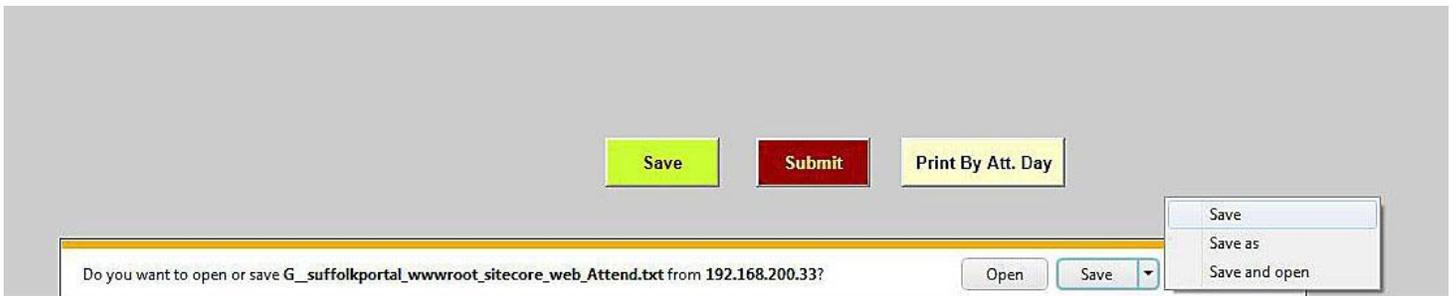
To retrieve the attendance from a given day (attendance has to have already been submitted previously) and save to file or print:

1. Sign in to SOAR (After 4:30 pm and prior to 8:45 am the following day)
2. Select a facility and an attendance date
3. Click the **ATTEND TXT** button on the main screen.
4. You will receive following message which will be located at the bottom of your screen.

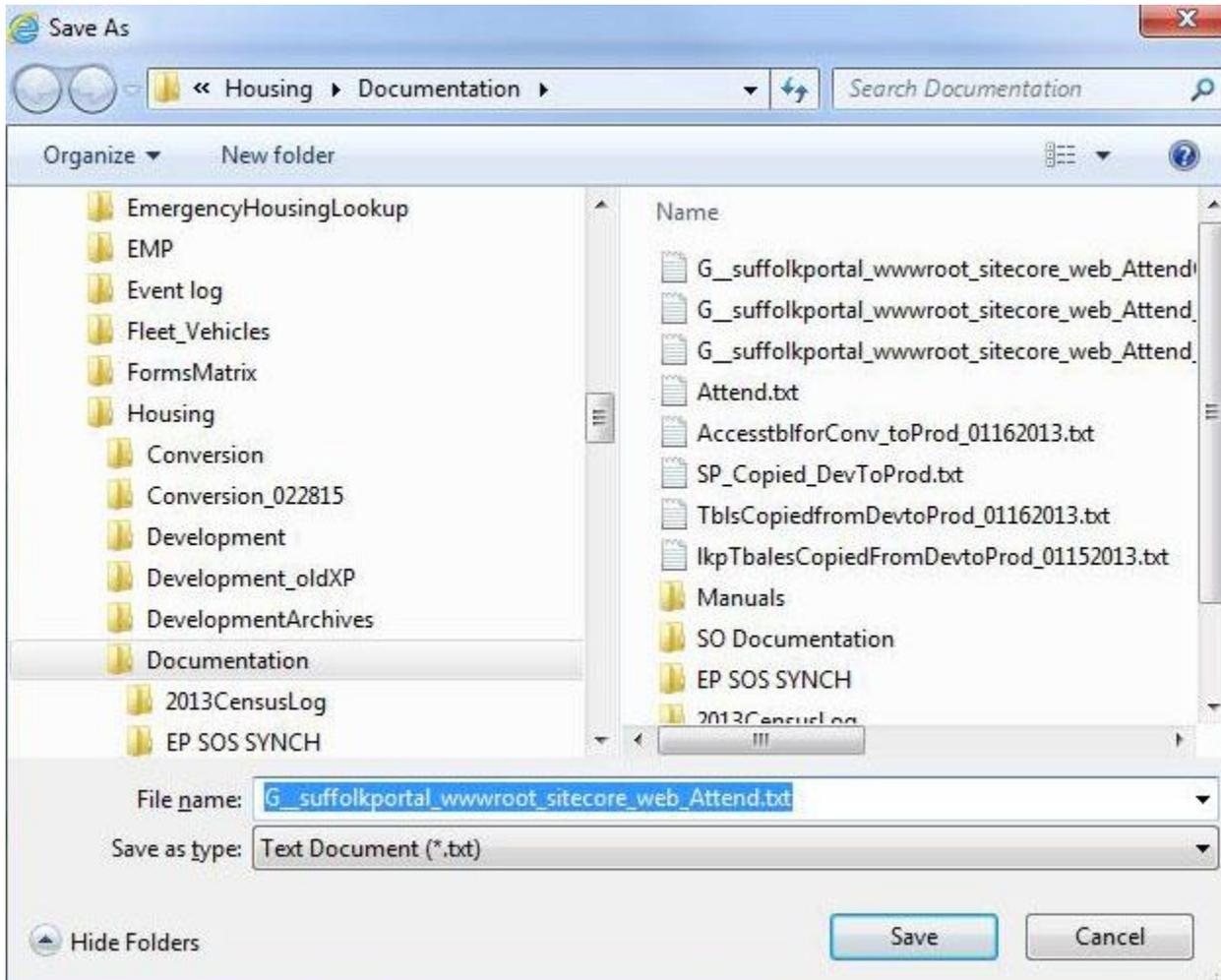


You have the option to open the file or save the file at this time.

To save the file with a meaningful file name, click the arrow to the right of the Save button and select "Save As":

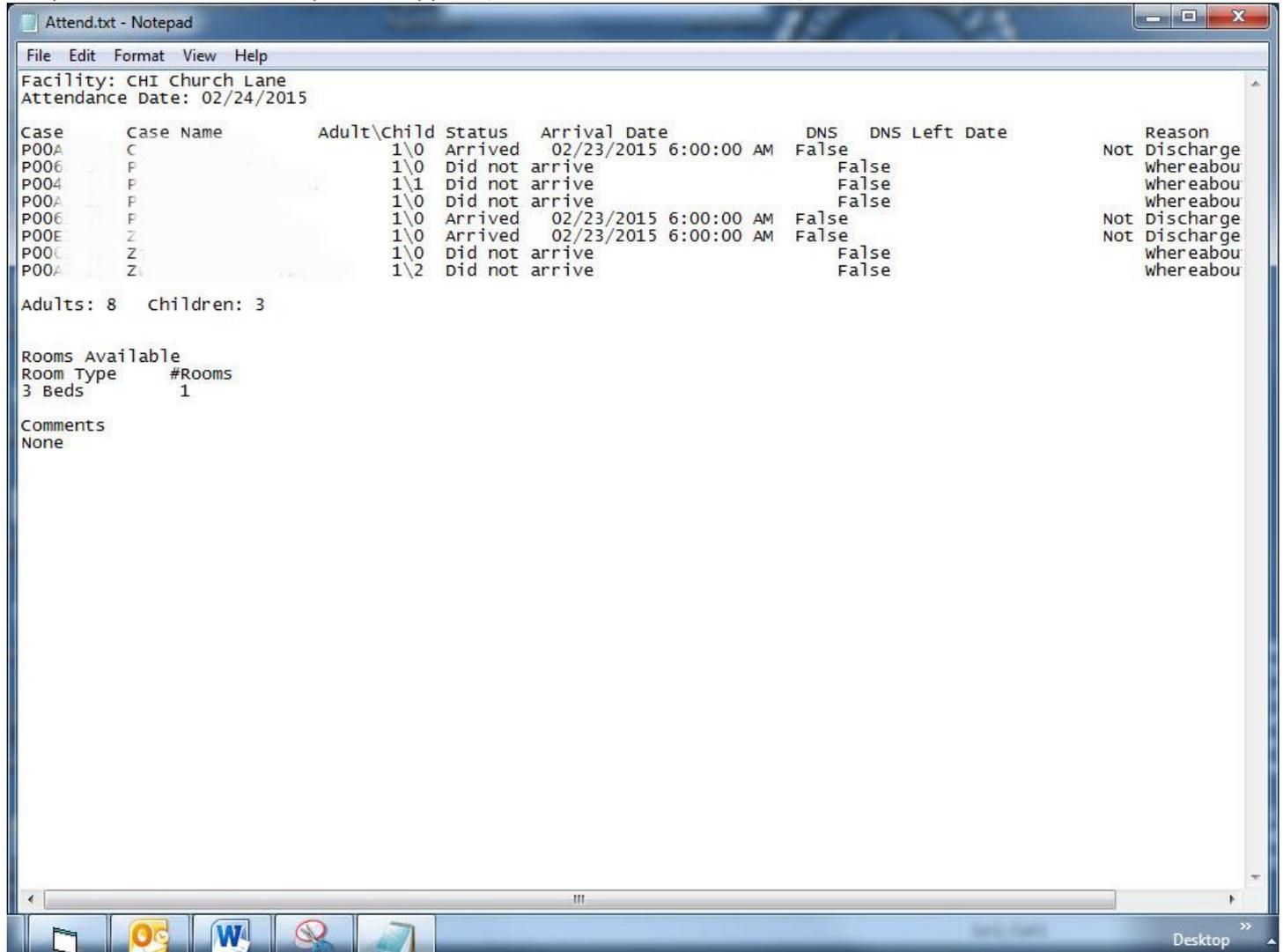


The following screen will appear and will contain a default name in the file name field. At this time, you can change this default file name to a more meaningful file name, for example: 20150302 Attendance Roster.txt and save it as a .txt file to any folder on your computer.



Once you have saved the file to your system, right click the file name and select "Open With" and select "Notepad" from the list.

Sample of how Attend. Txt report will appear (Case #'s and Names redacted):



Note: Make sure you open the printer properties and change the paper orientation in page setup to "Landscape" when printing and the Margins should be set to 0.25 or the file will not be aligned properly.

