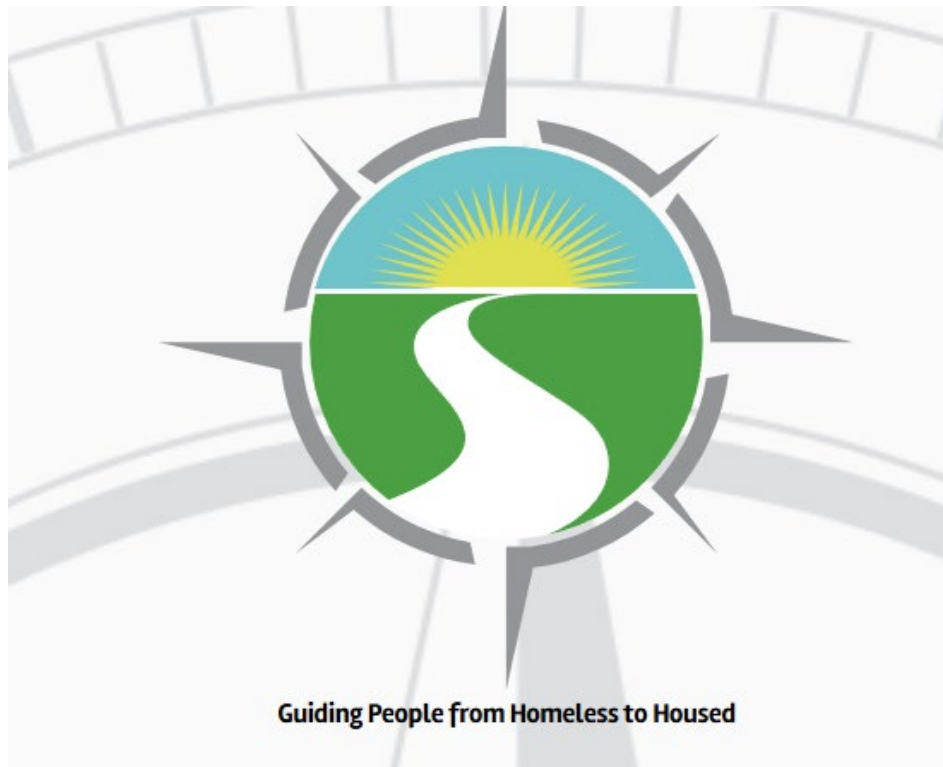


SHOW THE WAY

END USER GUIDE



Version 1.0



Show The Way

Guiding People from Homeless to Housed



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END USER GUIDE



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People • Communities • Brighter Futures

Introduction to Show The Way

What Is Show The Way?

Show The Way is a community-based platform designed to support communities in their efforts to move people from homelessness toward housing and greater stability. Developed by Simtech Solutions using human-centered design principles, the platform combines mobile case management with real-time, geospatial data collection to help outreach teams capture meaningful information while engaging with people in the field. Show The Way provides communities with a centralized system for managing client information, outreach activity, community resources, and other locally relevant data while supporting HMIS-compliant data collection.

Who Is Show The Way For?

Show The Way is designed to support the different people and organizations involved in responding to homelessness within a community. Street outreach workers and other frontline staff can use the platform to document interactions, identify client needs, connect people with services, and maintain information as relationships develop over time. Program leads, supervisors, and system administrators can use the Command Center to oversee outreach activity, review data, coordinate teams and geographic coverage, manage system settings, and support reporting and data-quality efforts. Show The Way also provides opportunities for first responders, community partners, and the general public to participate in coordinated response efforts, such as submitting requests for assistance that can be routed to the appropriate teams.

How Show The Way Supports Community Work

By bringing information about people, places, services, and outreach activity together in one system, Show The Way helps communities develop a more complete picture of their response to homelessness. Information collected through day-to-day outreach can help teams coordinate efforts, identify unmet needs, reduce duplication, monitor data quality, and better understand where services and resources are needed. This shared visibility supports both individual service coordination and broader community planning, helping organizations work together toward the goal of moving people from homelessness to housing.

Datastores, Roles, and Permissions

Datastores

A **datastore** is the local or regional Show The Way environment where information submitted through the app is stored. The datastore is connected to a regional Command Center that local administrators can access to manage information and configuration for their community.

- Most users will work within one datastore associated with their community or organization.
- Administrators may have responsibility for and access to multiple datastores.
- The information a user can see or manage inside a datastore depends on their assigned role and permissions.

Roles and Permissions

Roles define the general level of access a user has in Show The Way. **Permissions** control the screens, information, and actions available to that user within the system. As a result, two users working in the same datastore may have different views or capabilities.

Role	Typical Use	Access and Visibility	Key Restrictions
Admin	Users responsible for administrative setup and management.	Highest level of visibility. Typically supports activities such as resource management, survey setup, user management, and other system configuration.	Broad administrative access based on responsibilities.
Outreach	Users performing case management responsibilities and data collection.	Can access assigned projects and view client-level data within the system.	No change-management capabilities; access is limited to assigned projects.
First Responder	Users who assist with recording information but are not acting as case managers.	Can see client-level data that they personally record.	More restricted actions and visibility within the system.

Access Note: The screens and actions available in Show The Way may vary based on your role and permissions. If you expect to see a feature or action that is not available, contact your regional administrator to confirm your datastore assignment, role, and access.

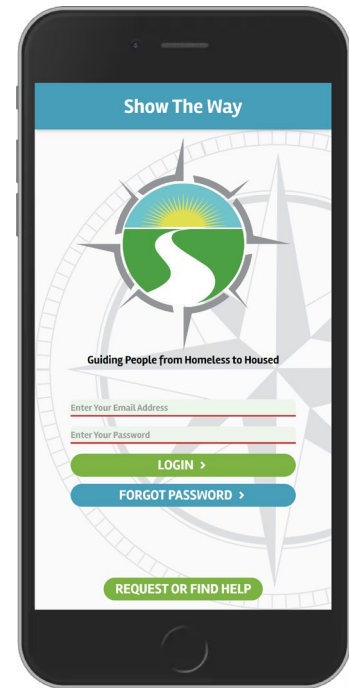
Logging In and Getting Started

Before you Start - What you need

- Make sure you have a valid Show The Way account provided by your organization and/or Regional Administrator.
- Confirm that you know which datastore you should use.
- Use a supported device with internet or mobile data access. Show The Way can be accessed through the mobile app or on the web.

Logging In

1. Access Show The Way using the method that applies to your device.
2. Enter the email address associated with your Show The Way account and your password, then select the option to sign in.
 - If this is your first time signing in, use the Forgot Password option to create or reset it.
3. After signing in, verify the project name shown at the top of the screen.
 - In many cases, you will be connected to your local datastore automatically. If a list of datastores appears, select the datastore for your organization.

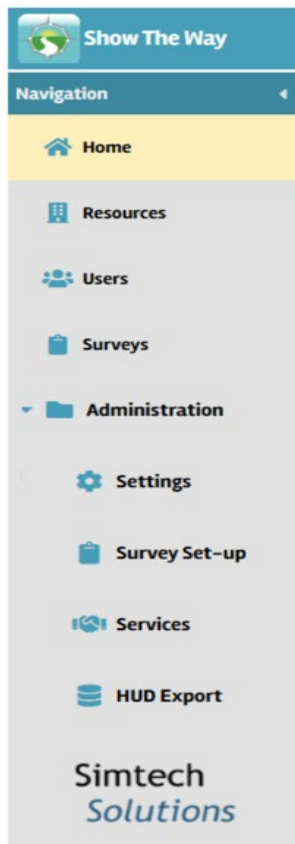


Helpful Tip: Session Timeout- users will be logged out after 30 minutes of inactivity. Users will need to log in again.

Ways to Access Show The Way

Platform	Best For	Primary Uses	Access Method
Show The Way Command Center	Administrators, program leads, and supervisors	System oversight, managing users and settings, reviewing outreach activity, monitoring data quality, managing surveys and services, reporting, and other administrative functions	https://commandcenter.showtheway.org
Show The Way Web/Desktop App	Outreach workers and other users working from a computer or browser	Client and case management, documenting interactions, accessing resources, managing client information, and completing outreach-related workflows	www.showtheway.org
Show The Way Mobile App	Street outreach workers, first responders, and other frontline users within the community	Capturing client and interaction information in the field, geo-tagging locations, documenting services and notes, accessing resources, managing encampment information, and responding to requests	Available for download on your mobile device via Apple or Google Play.

Show the Way Command Center Overview



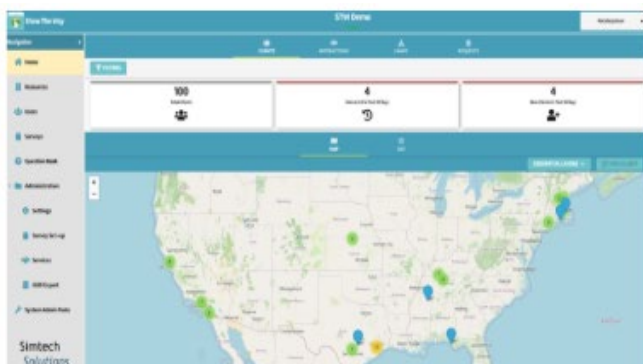
The Show The Way Command Center is the primary administrative workspace for managing and overseeing Show The Way at the community level. Designed for use from a desktop or workstation, the Command Center provides Administrators with the broadest view of system activity and access to tools for managing users, surveys, resources, services, HUD exports, and datastore-wide settings. It also provides visibility into client and outreach activity, system operations, and data quality, allowing administrators to support the overall management of Show The Way.

Feature	What You Can Do
Home	View client level information such as client records, interactions, encampments, and Requests.
Resources	This will show the projects in your datastore, resources you can refer clients to, and shelters that provide beds for clients.
Users	Shows everyone assigned to the datastore. Admins can manage end user information.
Surveys	Shows the list of available surveys assigned to this datastore. Admins can create new or edit existing surveys.
Administration	Here users can access settings, survey management, services, and export data.

Home

The Command Center is intended primarily as an administrative oversight tool. Administrators can use the Clients, Interactions, Camps (Encampments), and Requests sections to review information that has been recorded within Show The Way. Client-level information and other outreach activity should be entered through the appropriate Show The Way application (desktop or mobile) rather than through the Command Center.

The Home page provides quick access to core operational records and activity. Administrators can use this section of Show The Way to **view** client level data related to Client, Interactions, Camps, and Requests.



What Administrators Can Review

Feature	Administrative Use
Clients	View recorded client information.
Interactions	Review recorded client interactions and outreach activity.
Encampments	Review recorded encampment or camp information.
Requests	Review recorded requests associated with client or outreach activity.

Viewing Existing Records

The process for locating and reviewing client-level information is generally the same across Clients, Interactions, Encampments, and Requests.

Step 1: Select the Appropriate Feature

From the Show The Way Command Center, select the feature containing the information you want to review: Clients, Interactions, Encampments, or Requests.

Step 2: Search or Browse Existing Records

Use the available Map View or List View to locate the record you want to review. The information displayed will vary depending on the selected feature, but both views allow administrators to navigate existing records and identify the appropriate client, interaction, encampment, or request.

Step 3: Open the Record

Open the appropriate record using the option available for the selected view.

- **Map View:** Select the applicable map pin, then select the available View option for the record, such as View Interaction, View Encampment, or View Request.
- **List View:** Select the appropriate record, open the Menu on the left, and select View.

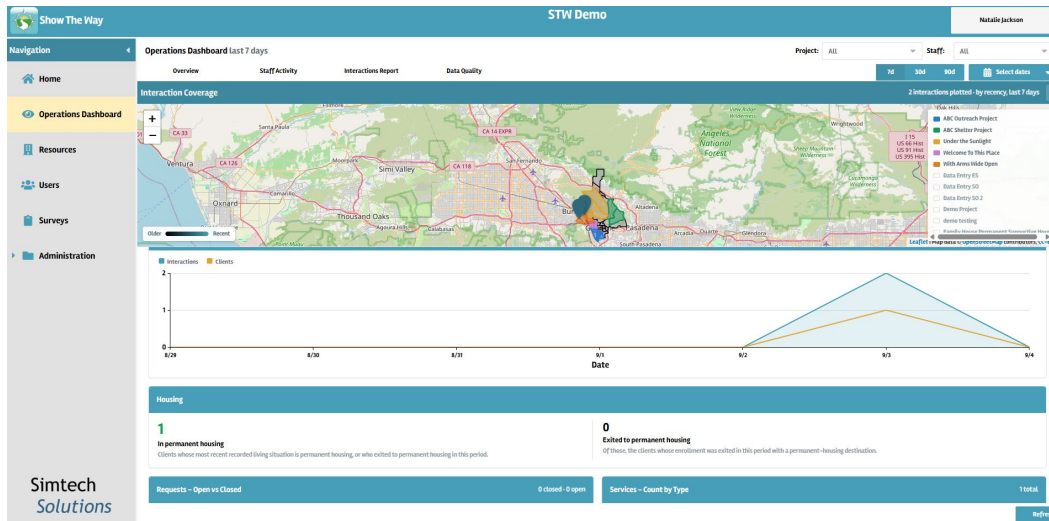
Step 4: Review the Recorded Information

Review the information contained within the record. Administrators can use this information for oversight, monitoring, troubleshooting, data-quality review, or understanding activity occurring within the datastore.

Important Note: The Command Center is best used for administrative review and oversight. When recording new client-level information or completing routine workflow activities, use the Web/Desktop App or Mobile App whenever possible to access the platform experience and functionality designed for data entry.

Operations Dashboard

The Operations Dashboard provides a comprehensive view of activity within Show The Way. This allows Administrators a centralized view of activity across projects and staff, making it easier to monitor performance, evaluate outreach, support reporting, and identify data-quality issues. Administrators can filter and sort information and multi-select by project and staff. Filters carry across each tab, allowing selections to remain consistent as you move between dashboard screens.



Tab	What You'll Find	Benefits for Administrators
Overview	• High-level summary of activity • Interactive coverage map • Key metrics for housing, requests, and services	• Quickly understand outreach coverage and recent activity • Identify areas with overlapping coverage, shown in red • See where activity is most recent (blue pins) or older (black pins) • Monitor key trends at a glance
Staff Activity	• Staff list with last login • Counts of interactions, services, closed requests, and open requests	• Review and compare activity by staff • Track engagement and workload • Export staff activity data for further analysis
Interactions Report	• Interaction trends and totals • Demographic, service, and living-situation summaries	• Identify interaction trends over time • Understand outreach coverage, activity, and client needs • Support program evaluation and reporting
Data Quality	• Data-quality indicators and issue list • Counts of missing, incomplete, overlapping, or inconsistent records	• Identify and address data-quality issues • Improve accuracy and completeness of client and project records • Export data-quality results for follow-up

Resources

Resources functions as a community-focused repository for identifying and managing resources that can help connect people to assistance.

Creating a Resource

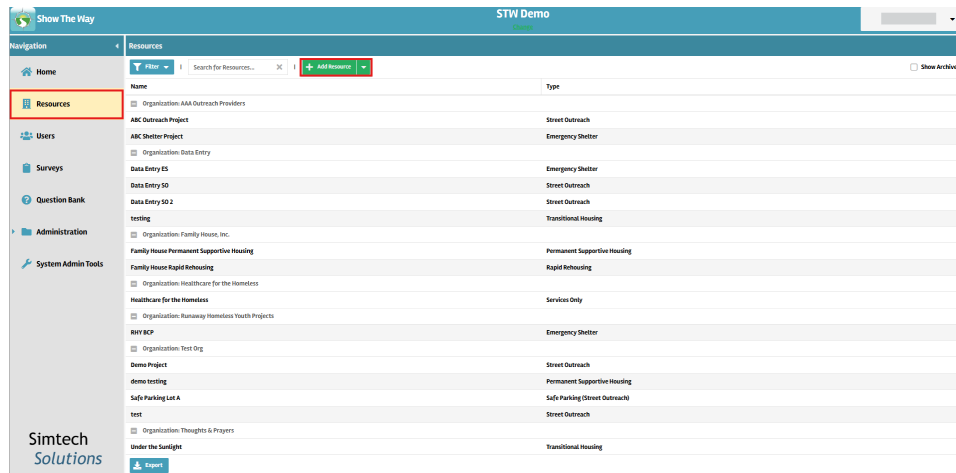
Step 1: Open Resources

In the Show The Way Command Center, select Resources from the left sidebar. This opens the area used to create and manage organizations and resources.

Important Note: Resource management includes creating resources, assigning users, editing HUD PDDEs, and maintaining resource details.

Step 2: Select Add Resource

From the Resources page, select the green + Add Resource button at the top of the page.



Step 3: Enter the Resource Details

In the pop-up window, select the appropriate Organization, enter the Resource Name, and select the Resource Type. Then select Add Resource.

Add Resource

Organization:

+

Name:

Type:

Add Resource

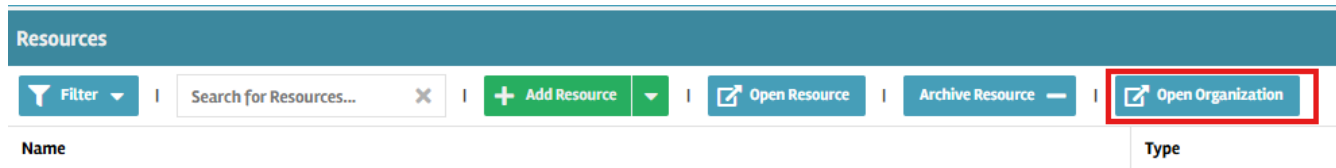
Step 4: Confirm the Resource Was Created

After the resource is added, confirm that it appears in the main Resource list.

Managing Organization Information

Step 5: Open the Organization

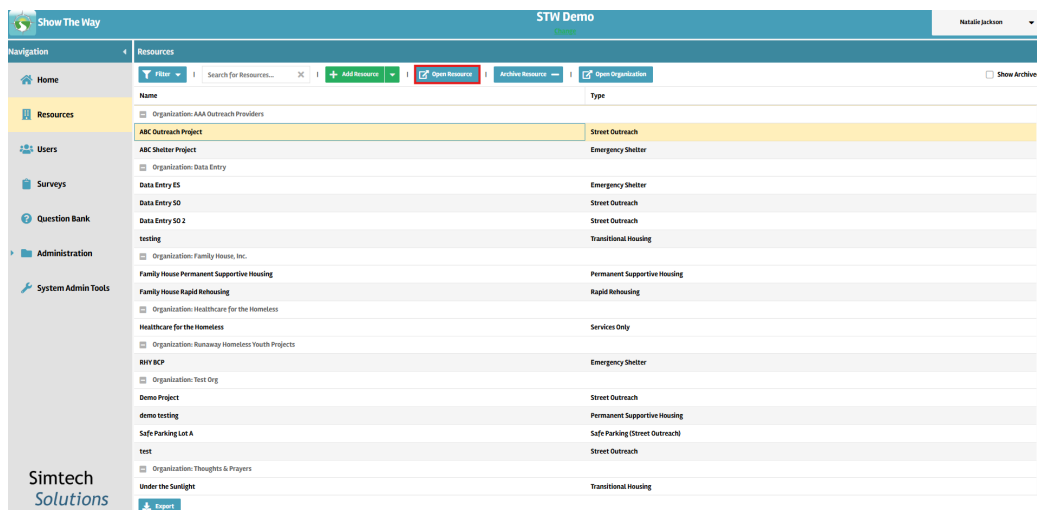
From the main Resource list, use the Organization Button in the top row to open the organization record.



Step 6: Update Organization Information

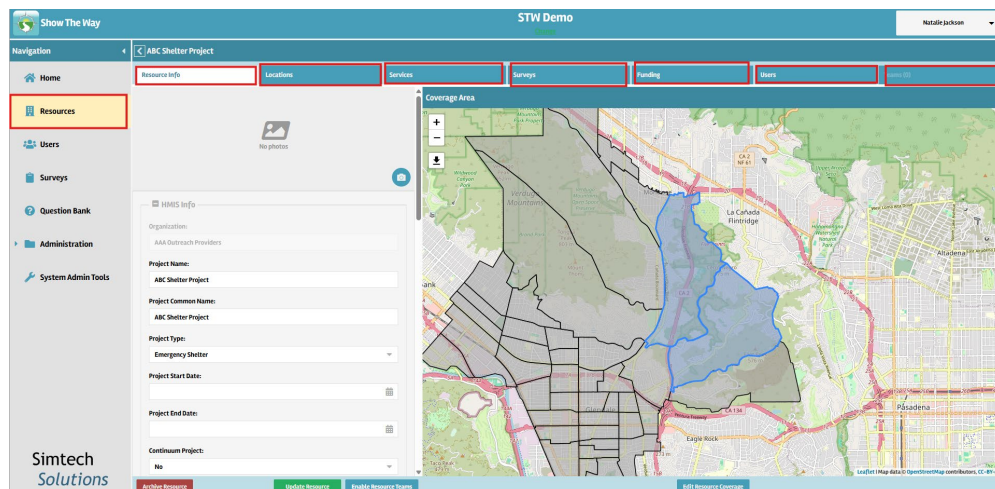
Update the organization name as needed, add a Common Name if the organization uses one, and indicate whether the organization is a Victim Services Provider. **Save** the changes when complete.

Managing Resource Information



Step 7: Open a Resource

From the main Resource list, select the resource you want to manage. **Select Open Resource**. The resource record contains tabs for Resource Info, Locations, Services, Surveys, Funding, Users, Teams, and Archive.



Step 8: Update Resource Info

Open the Resource Info tab and update the applicable HUD PDDEs, Resource Directory information, description, contact information, hours, and other resource details. Update the resource when finished.

Important Note: Except for bed inventory, Resource Directory details are maintained in Resource Info. The Overview and Contact information is displayed in Resource Directory views.

Managing Locations

Step 9: Open the Locations Tab

Select Locations from the resource record.

Important Note: The Locations tab is also where CoC Code, Geocode, and Geography type are entered.

The screenshot shows a form titled 'New Street Outreach Project' with several tabs: Info, Locations, Surveys, Funding, Users, and Teams (0). The 'Locations' tab is selected. Below the tabs are two buttons: 'Add Location' and 'Save*'. Below these buttons is a table with columns: Primary Location, Name, Street, City, State, Zip, CoC Code, Geo Code, and Geography. The first row in the table has a star icon in the Primary Location column, the name 'Main Office', the street '123 Broadway', the city 'Denver', the state 'CO', the zip '80014', the CoC Code 'CO-503', the Geo Code '080390', and the Geography '1'.

Step 10: Add a Location

Select Add Location, enter the relevant address and location details, and then select **Save**.

Important Note: A resource without an address can appear in Resource Directory List View but not Map View. Sheltered resources must have a primary location entered before they can have bed inventory. Add additional addresses here when a resource has multiple locations.

Managing Services

Step 11: Enable Custom Services, If Needed

If the resource should use custom services instead of the datastore defaults, return to Resource Info, clear Service Mode Default, and select Update Resource.

Important Note: Resources use predefined default services unless custom services are enabled. Default services can be used immediately but are not tied to HUD service elements. The Services tab becomes available after default service mode is turned off.

The screenshot shows a 'Settings' form. Under the 'Collect Current Living Situation?' section, there is a checkbox for 'Service Mode Default:' which is currently unchecked. A red arrow points to this checkbox. Below this is a dropdown menu for 'Display in Community Resource Directory?' with 'No' selected. Under the 'Tags' section, there are two tags: 'Meals' and 'Emergency Shelter'. At the bottom of the form, there are three buttons: 'Archive Resource', 'Update Resource', and 'Disable Resource Teams'. A red arrow points to the 'Update Resource' button.

Step 12: Assign Custom Services

Open the **Services** tab and select the checkbox beside each custom service that should be available to the resource.

Important Note: Unchecked custom services are not accessible to users of the resource.

< Street Outreach Demo

Resource Info

Locations

Services

Surveys

Funding

Users

2

Service	Service Category	HUD Category
☒ Case management	Care	P1.2 PATH Services,V2.2 SSVF:
☒ Clinical assessment	Health	P1.2 PATH Services
☒ Community mental health	Health	P1.2 PATH Services,P2.2 PATH
☒ Educational services	Education	P2.2 PATH Referral,R14.2 RHY
☒ Financial	Financial	General
☐ Care	Care	General
☐ Child Care	Care	General
☐ Clothing	Goods	General

Managing Surveys

Step 13: Add a Survey

Open the Surveys tab, select + Add on the left, choose the survey from the drop-down menu, and select Add Survey.

Important Note: Most resources need Personal Info, Homeless History, Income Benefits Insurance, and Resource Exit & Destination. Together, these surveys contain the required HUD enrollment questions. Only surveys that already exist in the datastore can be added here.

Managing Funding Sources

Step 14: Add a Funding Source

Open the **Funding** tab, select **Add**, choose the funding source, enter the start date, and select Add Funding Source.

Important Note: Survey-question visibility can depend on the funding source, so funding should be added to newly created resources.

New Street Outreach Project

Project Info | Locations | Surveys | **Funding** | Users | Teams (0)

+ Add | Remove

Funder Type | Start | End | Other Funder T... | Grant ID

Select a funding source: HUD: ESG - Street Outreach

Start Date: 05/01/2025

Add Funding Source

Project Info | Locations | Surveys | **Funding** | Users | Teams (0)

+ Add | Remove

Funder Type | Start | End | Other Funder T... | Grant ID

HUD: ESG - Street Outreach | 05/01/2025 | | |

Step 15: Add Funding Details

After the funding source is added, enter any additional applicable information, such as Other Funder Type or Grant ID.

Important Note: A resource can have multiple funding sources when necessary.

Assigning Users to a Resource

Step 16: Open the Users Tab

Select Users at the top of the resource record, then select + Add Users.

Important Note: Users must already exist in the datastore before they can be assigned to a resource.

STW Demo | Natalie Jackson

ABC Shelter Project

Resource Info | Locations | Services | Surveys | Funding | **Users** | Teams (0)

+ Add Users

User

Ben Dov, Joseph
e.joseph@simtechsolutions.com
p. 8008675309

Step 17: Add Users to the Resource

From the list of datastore users, select the plus (+) button beside each user you want to add to the resource.

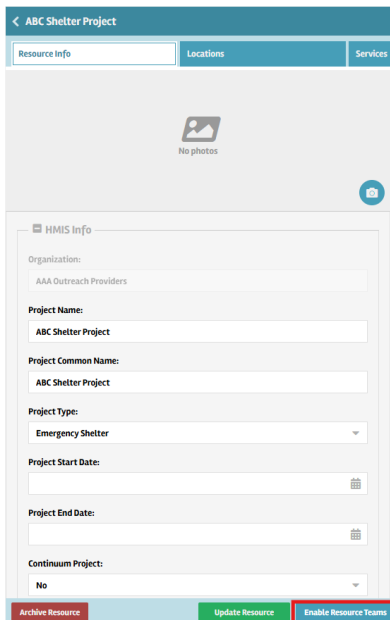
Important Note: Users must be assigned to at least one resource in the datastore to create enrollments. After assignment, their client interactions are connected to that resource.

Managing Resource Teams

Step 18: Enable Resource Teams

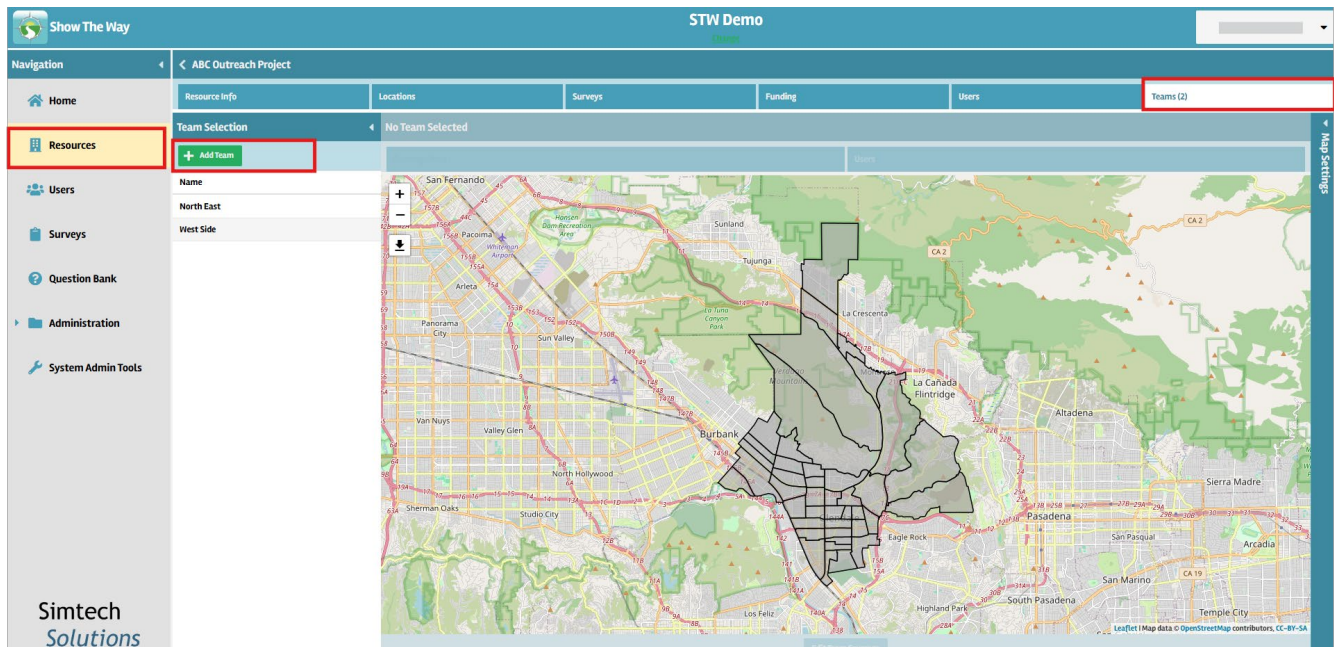
If teams will be used, open Resource Info and enable the Resource Teams setting. Update the resource to activate the Teams tab.

Important Note: Teams are optional and can be used to segment resource users by relevant groupings, such as geographic coverage, veteran outreach, or youth outreach.



Step 19: Create a Team

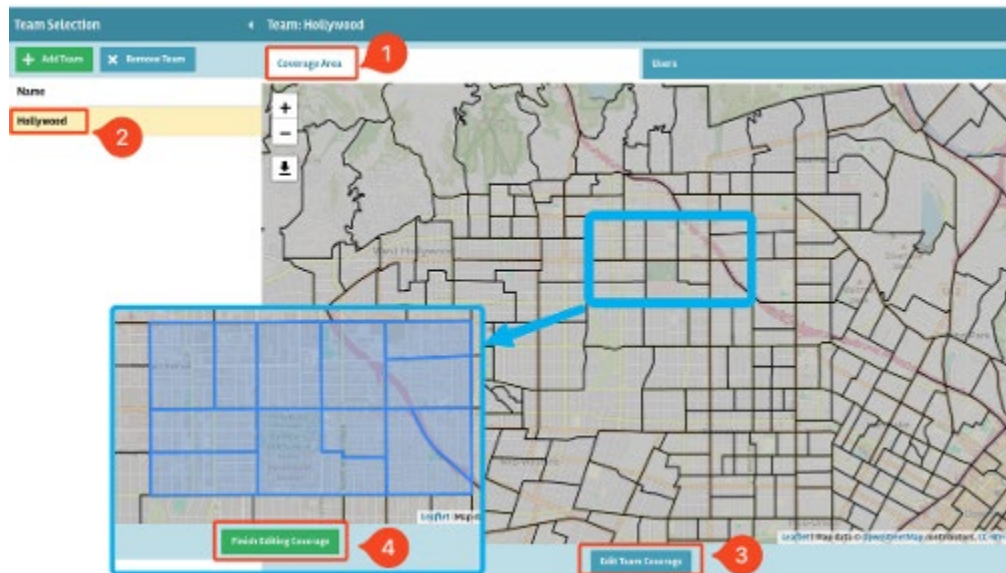
Open the Teams tab, **select Add Team**, enter the team name, and **select OK**.



Step 20: Assign Team Users and Coverage

Select the newly created team to highlight it. Add the appropriate resource users to the team. To define coverage, select Edit Team Coverage, select the census tracts to include, and then select Finish Editing Coverage.

Important Note: Selected team coverage areas are visible in the app's Resource Directory so workers can see the boundaries of their resource coverage.

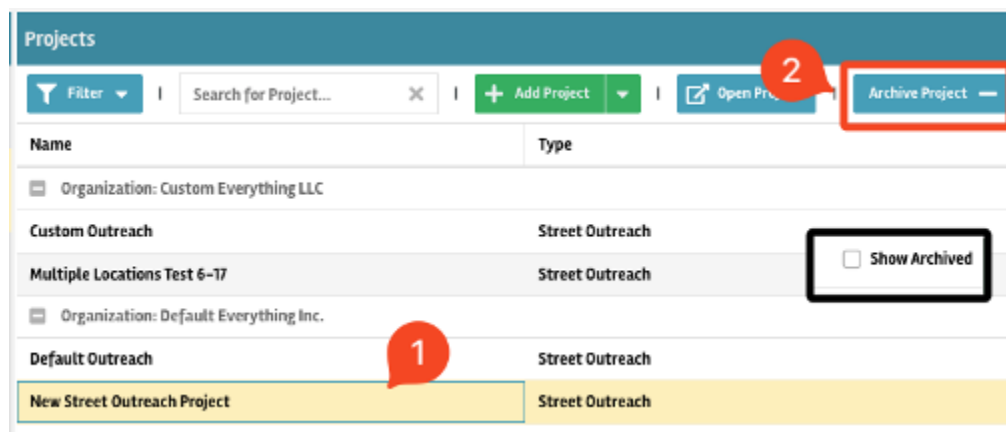


Archiving and Restoring Resources

Step 21: Archive a Resource

From the Resources page, select the resource name to highlight it, then select Archive Resource.

Important Note: Archive a resource when it has closed or was added to the datastore by mistake. Archived resources no longer appear in the active Resource list, and assigned users no longer see them as an option in the app.



Step 22: Restore an Archived Resource

To reactivate a resource, select Show Archived in the upper-right area of the Resources page, select the archived resource, and then select Restore Resource.

Users

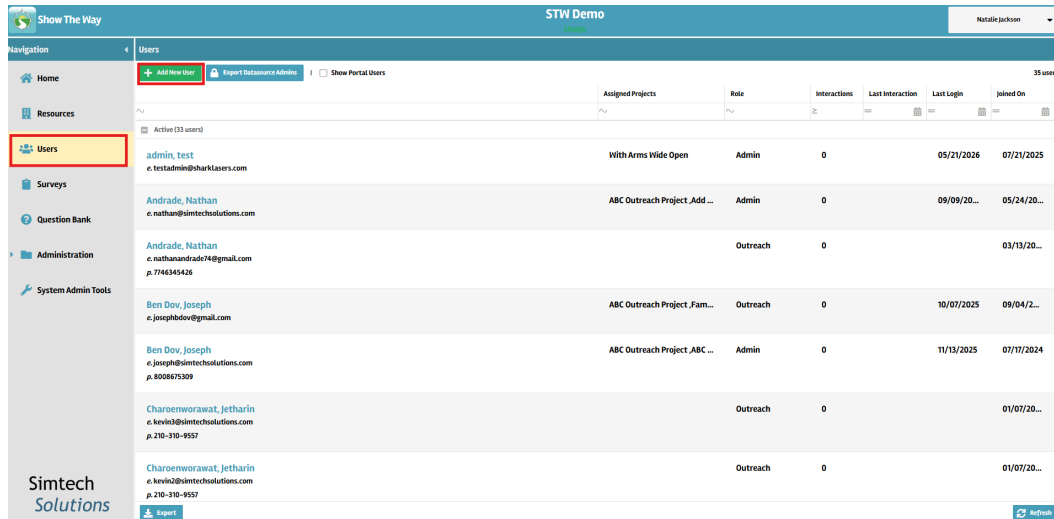
Creating a New User

Step 1: Open the Users Page

From the Show The Way Command Center, select the Users tab from the navigation menu. The Users page displays the accounts associated with the current datastore.

Step 2: Select Add New User

At the top of the Users page, select the green + Add New User button to begin creating an account.

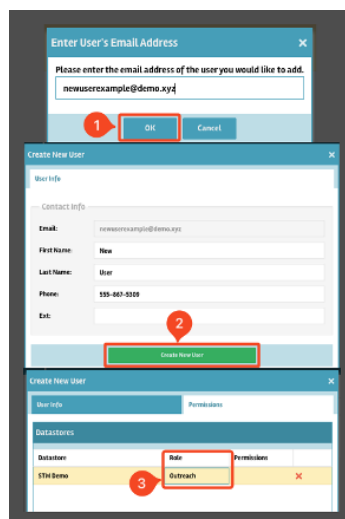


Step 3: Enter the User's Email Address

Enter the email address for the person you want to add, then **select OK**. Use the email address the user will use to access Show The Way.

Step 4: Enter the User's Information

In the next window, enter the user's available profile information, such as their name and phone number. When the information is complete, **select Create New User**.



Step 5: Review and Assign the User Role

After the account is created, review the user's role permissions. New users default to the Outreach role. Change the role when necessary so the user has the level of access appropriate for their responsibilities.

Step 6: Have the User Set Their Password

After the account has been added to the datastore, the new user must create a password before signing in. The user can open the Show The Way app or visit ShowTheWay.org, **select Forgot Password**, and follow the instructions sent to their email address.

Managing Existing Users

Existing user accounts can be managed from the Users page. Administrators can deactivate an account when access should be suspended while retaining an administrative record or remove a user's role from the datastore when access should be removed.

Deactivating a User

Step 1: Open the User's Account

From the Users page, select the name of the user whose account you want to deactivate.

Step 2: Open Permissions

In the user's account window, select the Permissions tab.

The screenshot shows the user management interface. At the top, there's a user card for 'TestFR, Role' with email 'roletestfr@simtechsolutions.com'. Below this, the 'Permissions' tab is selected. The 'Datastores' section shows a table with columns: Datastore, Role, Disabled, Date Disabled, Disabled By, and Permissions. The 'Disabled' dropdown menu is open, showing 'No' and 'Yes' options. The 'Date Disabled' field is highlighted.

Datastore	Role	Disabled	Date Disabled	Disabled By	Permissions
STW Demo	Admin	No			

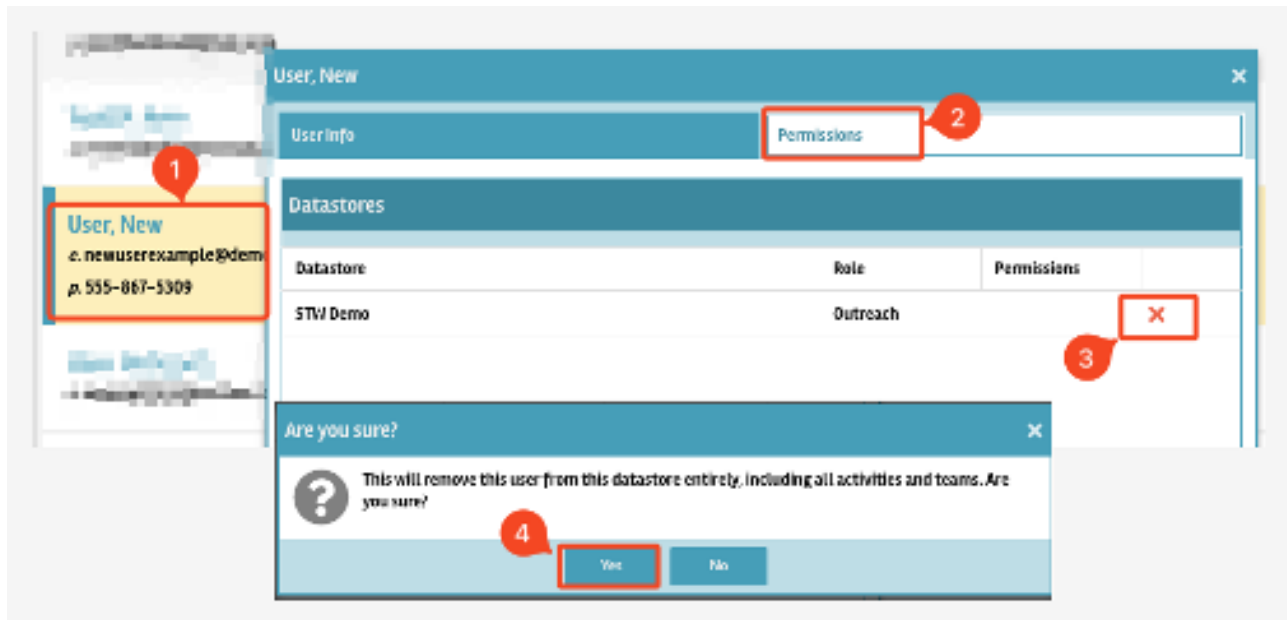
Step 3: Disable the Account

Locate the Disabled setting and use the drop-down menu to **select Yes**. Once saved, the account is disabled. Show The Way also retains information about who disabled the user and when the change was made.

Removing a User

Step 1: Open the User's Permissions

From the Users page, select the user's name and then open the Permissions tab.



Step 2: Remove the User's Role

Select the red X located to the right of the user's role. A confirmation message will appear.

Step 3: Confirm Removal

Review the confirmation message and select Yes to remove the user from the datastore.

Important Notes

- New users default to the Outreach role. Review permissions when the user requires a different level of access.
- Deactivating an account preserves administrative information such as the user's last login and the record of who disabled the account.
- Use the current datastore's Users page to ensure you are managing access for the correct Show The Way implementation.

Surveys

Survey labels can be updated when your organization needs to customize the wording of a survey question or its available response options. These changes are completed from the Surveys section of the Command Center.

The screenshot displays the 'STW Demo' interface. On the left, a navigation menu includes 'Home', 'Resources', 'Users', 'Surveys' (highlighted), 'Administration', 'Settings', 'Survey Set-up', 'Services', and 'HUD Export'. The main content area is titled 'Encampment Needs' and shows a survey question: 'What are the most immediate needs in this location?'. The 'Response Options' tab is active, showing a 'Name' field with 'Outreach_ServicesProvided', a 'Type' dropdown set to 'Checkbox', and checkboxes for 'HUD Compliance?', 'Required?', and 'Has Dependencies?'. Below this is an 'Editable' section with 'Label' and 'Spanish Label' text boxes. A 'Save Question' button is at the bottom right.

How to Update a Survey Question Label

Step 1: Open Surveys

From the Command Center, select Surveys from the left-hand navigation panel.

Step 2: Open the Survey

Locate and open the survey you want to update.

Step 3: Select a Question

Select the survey question whose displayed wording you want to modify.

Step 4: Update the Label

On the right side of the screen, locate the Label field and edit the wording as needed.

Step 5: Save the Change

Select Save to apply the updated question label.

Updating Response Options

For checkbox or dropdown questions, the available response values can also be customized. Open the applicable survey question, select the Response Options tab, and modify the response values as needed.

Important Note: Updating a survey label changes the wording displayed for a selected question. This is different from changing the survey's Display Name. Survey Display Names are managed under Administration → Survey Set-up.

Related Survey Administration

Adding or removing surveys: Go to Administration → Survey Set-up. From this area, administrators can add or remove existing surveys and edit a survey's Display Name directly within the table.

Administration

The Administration tab provides access to system settings and tools used to manage shared configuration. From this area, authorized users can manage surveys and services, adjust settings, and export data. Because changes may affect other users or workflows, confirm your organization's local policies and procedures before modifying shared configuration.

Survey Setup

Managing surveys is a two-part process. Part 1 determines which surveys are included in your Show The Way implementation. Part 2 manages the wording and response options displayed within those surveys. This section focuses only on Part 1: adding and removing surveys through Survey Set-up.

Understanding the Two-Part Process

Part	Location	Purpose
Part 1: Survey Set-up	Administration > Survey Set-up	Add or remove existing surveys and edit the survey Display Name.
Part 2: Survey Labels	Surveys tab	Modify question wording and response options. This is a separate process and is not covered in this section.

Show The Way

STW Demo

test admin

Navigation

Home

Resources

Users

Surveys

Administration

Settings

Survey Set-up

Services

HUD Export

+

Add

×

Remove

Status	Name	Display Name	For Participant?	Category	Resource Directory?
Live	Income, Benefits, and Insurance	Income Benefits Insurance	Yes	GENERAL	No
Live	Homelessness History - ES, SH, or SO	Homelessness History	Yes	GENERAL	No
Live	Personal Information (Disabling Condi...	Personal Info	Yes	GENERAL	No
Live	Date of Engagement	Date of Engagement	Yes	GENERAL	No
Live	Individual Needs	Individual Needs	Yes	CLIENT	No
Live	Request Help	Request Help	No	GENERAL	Yes
Live	Background Client Portal	Background Client Portal	Yes	PORTAL_CLIENT	No
Live	Bed Inventory	Bed Inventory	Yes	INVENTORY	No
Live	CE Event - Demo	CE Event - Demo	Yes	CE	No
Live	Consent	Consent	Yes	CLIENT	No
Live	Encampment Assessment - Checkboxes U...	Encampment Assessment - Checkboxes U...	Yes	CAMP	No
Live	Local Profile Details	Local Profile Details	Yes	CLIENT	No
Live	Encampment Needs	Needs	Yes	CAMP	No
Live	Needs and Goals Client Portal	Needs and Goals Client Portal	Yes	PORTAL_CLIENT	No
Live	PATH Enrollment	PATH Enrollment	Yes	GENERAL	No
Live	PIT Information Survey	PIT Information Survey	Yes	CLIENT	No
Live	PIT Information Survey - v2	PIT Information Survey - v2	Yes	CLIENT	No
Live	Project Exit and Destination	Project Exit and Destination	Yes	GENERAL	No
Live	Public Portal Request	Public Portal Request	Yes	PORTAL_REQUEST	No
Live	Request with HDE	Request with HDE	No	GENERAL	No
Live	Runaway Homeless Youth Intake Survey	Runaway Homeless Youth Intake Survey	Yes	GENERAL	No

Adding and Removing Surveys

Use Survey Set-up to choose which existing surveys are part of your local Show The Way implementation. You can also edit a survey's Display Name directly within the Survey Set-up table.

Step 1: Open the Command Center

Access the Show The Way Command Center using your authorized account.

Step 2: Open Survey Set-up

From the Administration area, select Survey Set-up.

Step 3: Review the survey list

Review the existing surveys and identify which surveys should be included in your implementation.

Step 4: Add or remove surveys

Use the available controls to add an existing survey to the implementation or remove a survey that should no longer be included.

Step 5: Edit the Display Name, if needed

Edit the survey Display Name directly within the Survey Set-up table when the name shown to users needs to be updated.

Services

Access service settings, create custom services, categorize them, and make them available for use by resources in Show The Way.

Understanding Service Options

- Services must be added to the Show The Way implementation before they can be made available to Resources and used by outreach workers in the app. Each Resource can use either Default Services or Custom Services.
- **Default Services** are predefined, cannot be edited, and are available for immediate use. They are intended for basic service tracking and are not tied to HUD elements.
- **Custom Services** are created and maintained by administrators. They can reflect community-specific services and can be categorized so they connect to the appropriate HUD and funding information.

CUSTOM SERVICES			DEFAULT SERVICES		
Service	Service Category	HUD Category	Service	Service Category	HUD Category
Bed-right	Shelter	General	Clothing	Goods	General
Check in		General	Employment	Work	General
Child Care	Care	R14.2 RHH Services,V3.3 SSVF Financial Assist	First Aid	Health	General
Clothing	Goods	General	Food & Water	Food	General
Coffee	Food	P1.2 PATH Services,V3.3 SSVF Financial Assist	Housing	Housing	General
Education	Education	P1.2 PATH Services	Hygiene Items	Care	General
Employment	Work	General	IDs	Legal	General
First Aid	Health	General	Income & Benefits	Financial	General
Food	Food	V3.3 SSVF Financial Assistance	Other Supplies	Goods	General
Food & Water	Food	General	Shelter	Shelter	General
Habilitation / rehabilitation		P1.2 PATH Services	Shower	Care	General
Health/medical care	Health Care	P1.2 PATH Services	Transportation	Transit	General
Housing	Housing	General			
Housing eligibility determination		P1.2 PATH Services			
Housing minor renovation		P1.2 PATH Services			
Housing moving assistance		P1.2 PATH Services			

Adding a New Services

Step 1: Open Administration

From the Show The Way Command Center, locate and select Administration in the left-hand navigation.

Step 2: Open Services

Under Administration, select **Services** to open the service-management screen.

Step 3: Open the Custom Services Screen

On the Services page, navigate to the Custom Services area.

Step 4: Select Add New

At the bottom-left of the Custom Services screen, select **+ ADD NEW** to begin creating a service.

STW Demo		
CUSTOM SERVICES		
DEFAULT SERVICES		
44	Service	Service Category
	~	~
	Bed-night	Shelter
	Case management	General
	Check In	W1.2 HOPWA Services
	Child Care	General
	Clothing	R14.2 RHY Services,V3.3 SSVF Financial Assistance
	Coffee	General
	Education	P1.2 PATH Services,V3.3 SSVF Financial Assistance
	Employment	P1.2 PATH Services,W1.2 HOPWA Services
	First Aid	General
	Food	General
	Food & Water	V3.3 SSVF Financial Assistance
	Habilitation / rehabilitation	General
	Health/medical care	P1.2 PATH Services
	Housing	P1.2 PATH Services
	Housing eligibility determination	General
	Housing minor renovation	P1.2 PATH Services
	Housing moving assistance	P1.2 PATH Services
	Housing services	P2.2 PATH Referral
	Hygiene Items	General

+ ADD NEW

Step 5: Enter the New Service

Enter the requested information for the new service, including a clear service name, and save or confirm the new service.

Important Note: Use service names that are clear and recognizable to the outreach workers who will select them in the Show The Way app.

Categorizing and Managing a Custom Service

Step 6: Open the Service Menu

Locate the custom service you want to manage and select the hamburger menu to the left of the service row.

Step 7: Assign or Update the Service Category

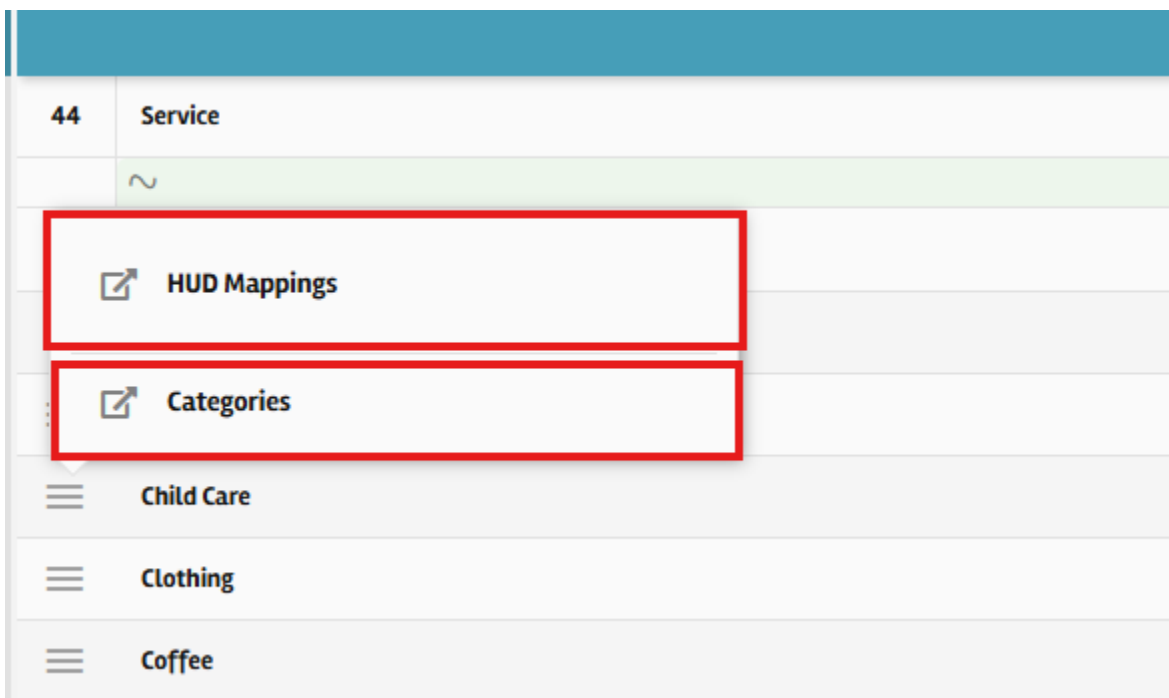
Use the service options to select or update the appropriate Service **Category** for the custom service.

Important Note: Adding Service Categories improves the ability to search for and filter services.

Step 8: Assign or Update the HUD Category

Select the appropriate **HUD Category** for the custom service and save the change.

Important Note: The HUD Category maps the service to the appropriate HUD/funding type. Correct categorization is important when community-specific services need to be tied back to funding sources.



Step 9: Repeat for Additional Services

Repeat the creation and categorization process for each community-specific service that should be available in the implementation.

Making Custom Services Available to Resources

Step 10: Open the Resource

Return to Resources and open the resource that should use the custom services.

Step 11: Confirm the Resource Uses Custom Services

In Resource Info, confirm that **Service Mode Default** is turned off, then update the resource if you changed the setting.

Important Note: A resource uses either Default Services or Custom Services. The Services tab becomes available for custom service assignment after Service Mode Default is turned off.

Step 12: Open the Resource's Services Tab

Select the Services tab within the resource record.

Step 13: Assign Services to the Resource

Select the checkbox beside each custom service that should be available to the resource.

Important Note: Only the custom services selected for the resource will be accessible to users working under that resource.

HUD Export

Administrators can export data from the Command Center in the current HUD Comma Separated Value (CSV) Exchange Format by following these instructions:

The screenshot displays the 'STW Demo' application interface. On the left is a 'Navigation' pane with a tree structure. The 'HUD Export' option is highlighted with a red box. The main area shows an 'Exports' table with columns: ExportID, Datastore, Name, Time Started, Time Completed, Export Start Date, Export End Date, and Requested By. The table contains four rows of export data. A red box highlights the 'Create Export' and 'Download Export' buttons in the top left of the table area.

ExportID	Datastore	Name	Time Started	Time Completed	Export Start Date	Export End Date	Requested By
1813591450	STW Demo	4/1 Test	03/24/2026 01:56 pm	03/24/2026 01:56 pm	04/01/2025	03/31/2026	Stevens, Connor
1561279931	STW Demo	FY26 Test (1)	02/12/2026 12:13 pm	02/12/2026 12:13 pm	10/01/2024	09/30/2025	Stevens, Connor
1441213781	STW Demo	FY26 Test	10/01/2025 10:27 am		10/01/2024	09/30/2025	Stevens, Connor
1812782489	STW Demo	9/29 Test	09/29/2025 03:02 pm		08/01/2025	08/29/2025	Ben Dou, Joseph

Step 1: Navigate to HUD Export Tab

From the Navigation Pane, underneath Administration, select **HUD Export**.

Step 2: Create Export

Click on the “Create Export” button. On the pop-up window, select the date range for the export, enter a name for the export, then click **Submit**. Click **OK** on the confirmation window.

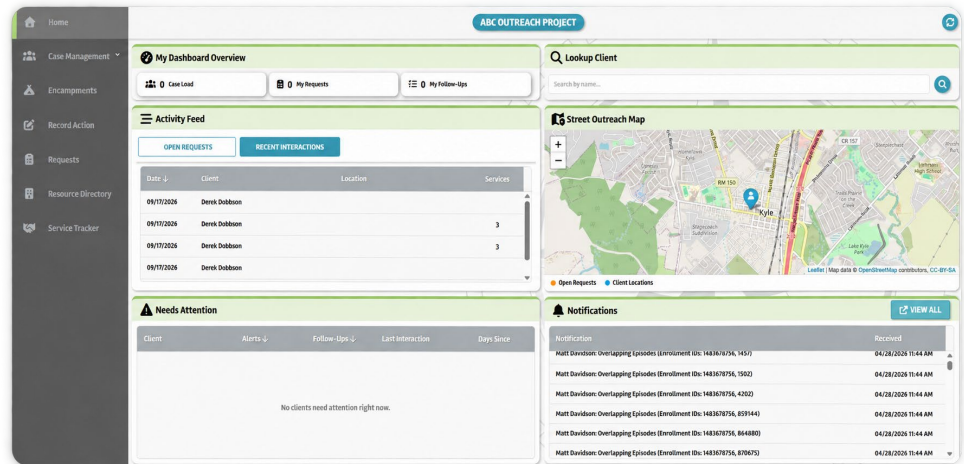
Step 3: Download Export

Once the processing is complete, click on the newly created export to select it. Click **Download Export** to have the zip file containing the HUD CSV Data saved to your computer’s Downloads folder.

Show the Way Desktop/Website Overview

Home Page Overview

The Home page is the landing page displayed after signing in to the Show The Way Website/Desktop App. It provides quick access to common client and project functions, while the left-side navigation pane provides access to the primary application workflows.



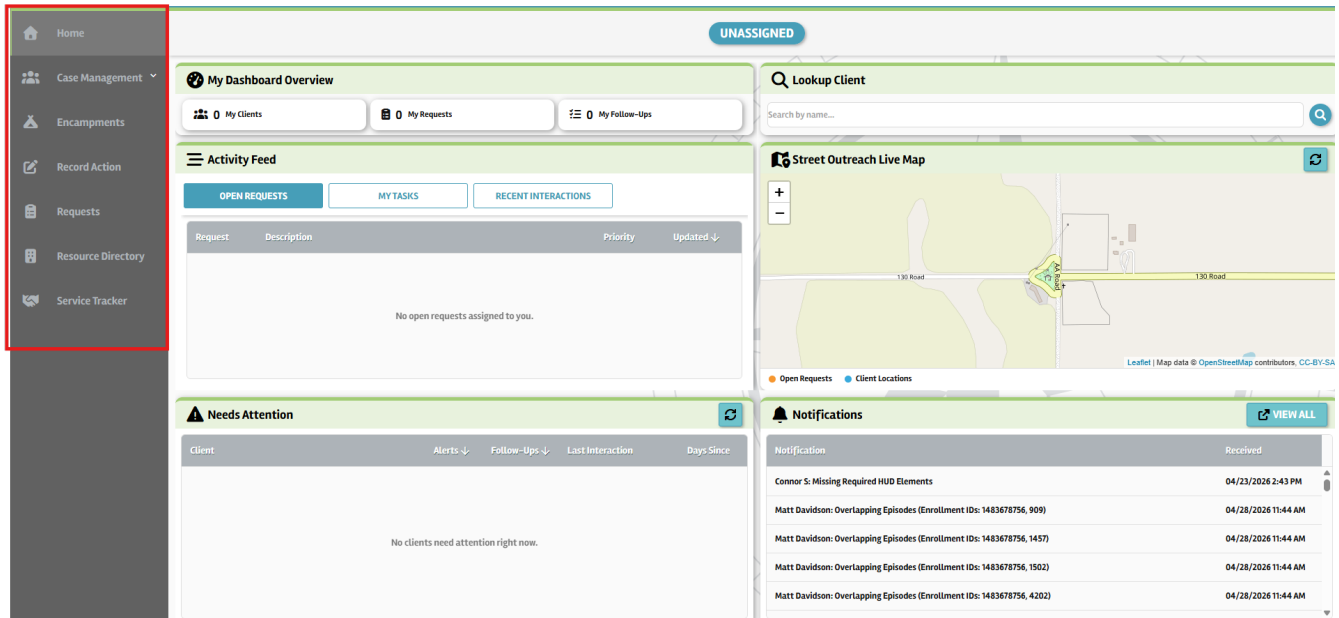
Important Note: The features available to an individual user may vary based on their datastore, project assignments, and permissions.

Home Page Overview

#	Home Page Item	What It Does
1	Project Assignment	Displays the name of the current project you are currently working in. Confirm the correct assignment before beginning work.
2	My Dashboard Overview	Provides a quick summary of your Case Load, My Requests, and My Follow-Ups, with a count for each.
3	Lookup Client	Search for an existing client by entering their name and selecting the search icon.
4	Activity Feed	Switch between Open Requests and Recent Interactions to review activity. Recent Interactions displays the date, client, location, and number of services recorded.
5	Street Outreach Map	Displays mapped Open Requests and Client Locations. Use the legend to identify marker types and the + / - controls to adjust the zoom.
6	Needs Attention	Highlights clients who may need follow-up, with columns for Alerts, Follow-Ups, Last Interaction, and Days Since. An empty-state message appears when no clients currently need attention.
7	Notifications	Highlights data quality issues that need to be reviewed and addressed, along with when each notification was received. Select View All to access the full notification list.

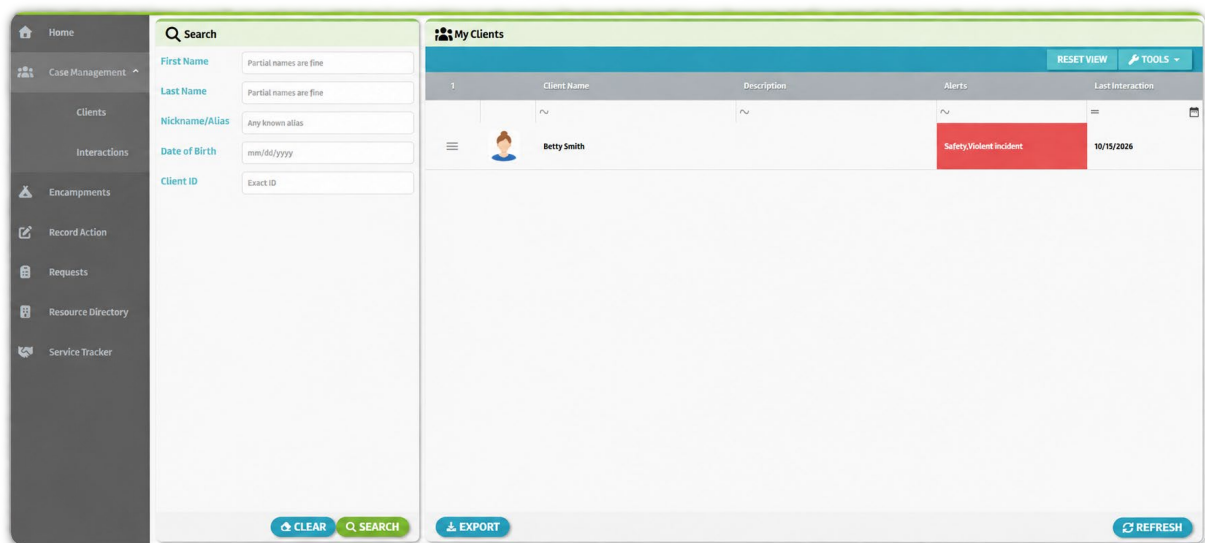
Navigation Pane Overview

The left-side navigation pane remains available throughout the Website/Desktop App.



#	Navigation Item	What It Does
1	Home	Returns you to the main landing page after signing in.
2	Case Management	Opens client-focused tools used to look up clients, select from your client list, and work with client records.
3	Encampments	Opens the community encampment map and list. Use this area to view encampment pins, switch between map and list views, search for encampments, and add a new encampment when permitted.
4	Record Action	Provides options for recording activity that is not necessarily tied to a specific client, including Request Help and Known Locations Survey workflows. Available options may depend on local configuration.
5	Requests	Displays the datastore's requests. Use list or map view and available search or filter options to locate and review requests.
6	Resource Directory	Opens the Resource Directory in map view, with an option to switch to list view. Use it to locate projects and community resources, including resources available to clients and shelters that provide beds.
7	Service Tracker	Supports applying or recording services for more than one client at a time, while also allowing use for an individual client.

Case Management Overview



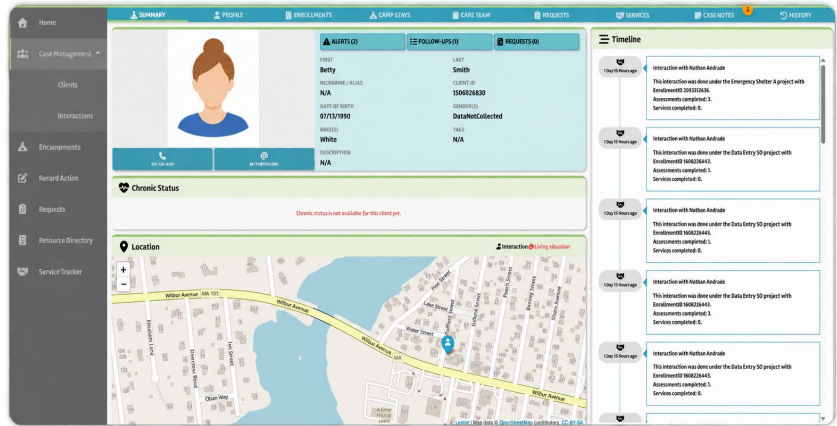
When navigating to the Case Management page on the Show The Way desktop/website platform, the landing page allows end users to:

Navigation Item	What It Does
Lookup Client	Opens the client search form, where you can search for an existing client or begin creating a new client record without starting an interaction.
My Clients	Displays clients with whom you have interacted, been assigned, created, or enrolled in a project. Clients you only searched for, or whose personal information you updated without beginning an interaction, may not appear here.
Clients	Displays client records across the datastore in both List View and Map View, allowing users to locate and review clients within the selected datastore.
Interactions	Displays recorded client interactions across the datastore in both List View and Map View, allowing users to review interaction activity and where interactions have occurred.

Case Management

The Client Profile

The Website version of the client profile organizes client information into tabs, so you can review details, history, services, requests, and related records.



Client Profile	What It Does
Summary	Overview including the client's photo, key details, a map marker for the most recent interaction location, and the most recent Current Living Situation location when collected.
Profile	Editable client details such as name, demographics, and contact information, plus an Other Client Details survey for additional client-level questions.
Enrollments	Grid of the client's active project enrollments.
Camp Stays	Grid of encampments where the client has stayed.
Care Team	Staff members assigned to the client's care team.
Requests	Requests or tickets tied specifically to the client.
Services	Services already logged for the client and, when enabled, an Add Services button for recording a new service.
Case Notes	Mini tab panel containing Alerts, Follow-Ups, and Client Notes. Each section includes its own Add button; the tab may show a badge for open alerts.
History	Combined map and grid of the client's past interactions, including date, user, project, and distance from the client's known location.

Role-Based Visibility: Some tabs may not appear for every user. For example, Case Notes and History are hidden for First Responders.

Accessing the Client Record

Step 1: Open Case Management

Open Case Management and locate the client using the workflow available to you, such as Clients, Lookup Client or My Clients.

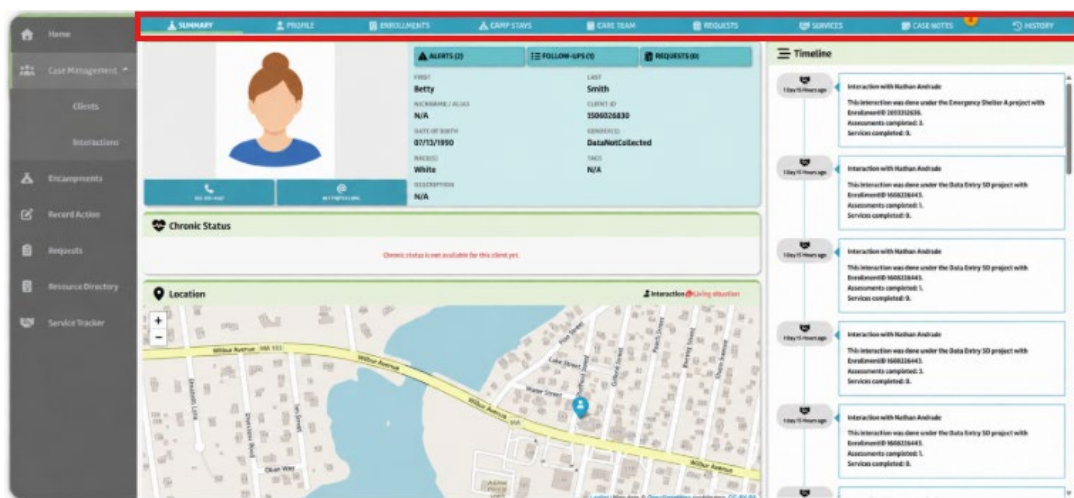
Step 2: Confirm You Have the Correct Client

Review the client's identifying information before making changes or recording new information. If not, select **+ ADD NEW** from the Lookup Client feature.

Step 3: Review the Summary

Use the Summary screen to orient yourself to the client. Review available identifying information, alerts or follow-ups, requests, recent location information, and the interaction timeline before moving into the editable or related tabs.

Helpful Tip: The Summary is an orientation point. Use the tabs along the top of the client record to complete or review the detailed information associated with the client.



Complete the Client Profile

Use Client Profile to review and maintain the client's core record before moving into project- or service-specific information.

Step 4: Open Profile

Select Profile from the client-level navigation.

Step 5: Open Client Details

Open Client Details to review the client's complete profile and make changes when needed.

Step 6: Review and Update Client Information

Complete as much information as is currently available. Depending on the configured fields, this may include identifying information, demographics, contact information, and other client details.

Step 7: Add Contact Information When Available

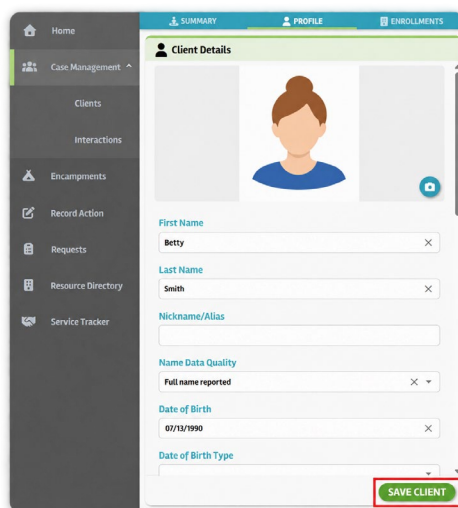
Enter or update the client's phone number and email address when known. Contact shortcuts may become available when this information is present.

Step 8: Review Tags or Priority Information

Apply or update available tags when appropriate for your local workflow. Priority clients may display a priority indicator in applicable client lists.

Step 9: Save Client Details

Select Save Client after adding or changing information.



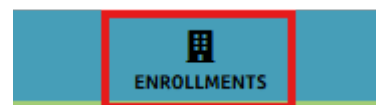
Step 10: Complete Other Client Details, If Applicable

Review Other Client Details to update any additional client-level surveys configured for your community. Select the applicable survey, enter the available information, and submit it.

Best Practice: Review the Profile first so the client's core information is as current as possible before you document enrollment, service, request, or other case-management activity.

Review and Maintain Enrollments

Open Enrollments to review the client's project enrollment information. For communities using expanded HMIS enrollment workflows, enrollment data may include entry, update, exit, and other enrollment stages.



Step 11: Open Enrollments

Select **Enrollments** from the client-level navigation and review the enrollment records associated with the client.

Step 12: Confirm the Correct Project

Before entering or updating enrollment data, confirm that your active project assignment matches the project where the information should be recorded.

Important Note: Enrollment data is tied to the active project assignment.

Step 13: Review the Enrollment Status

Determine whether the client is beginning an enrollment, has an active enrollment, is completing an exit, or is being re-enrolled.

Step 14: Complete Applicable Enrollment Assessments



Follow the enrollment workflow for the selected project by selecting **ADD NEW** on the Enrollments tab. Complete the applicable Entry, Update, or Exit Assessment and submit the information currently available.

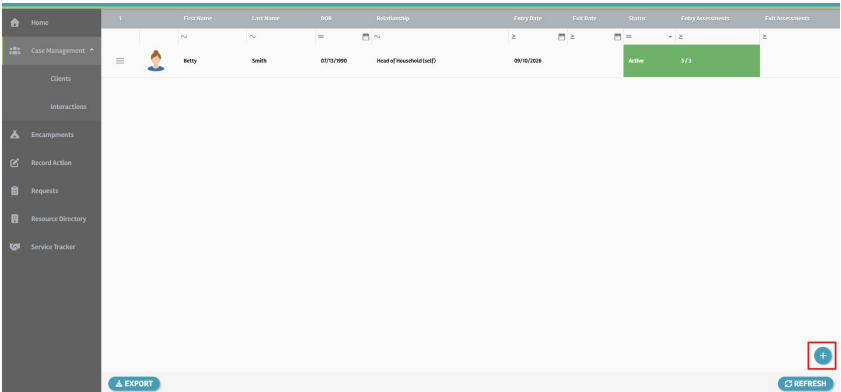
Step 15: Record the Current Living Situation

When prompted, review the Information Date and update it if back data entry is needed. Select where the client is sleeping. If the client is staying in an existing Show The Way encampment, select that encampment from the available list to add the client to the camp. Select **Save or Next** to continue.

Important Note: If the information is not available, even for required fields, you can still select **Save** and continue. Required fields are indicated with an *

Step 16: Update Household Members

Click the + at the bottom right of the screen to add additional household members to the project enrollment. Select **Next**.



Step 17: Income, Benefits, and Insurance Information

With the information you have available, enter the information to update the enrollment. Select **Next**.

Step 18: Personal Information

With the information you have available, update the personal information fields. Select **Next**

Step 19: Homelessness History

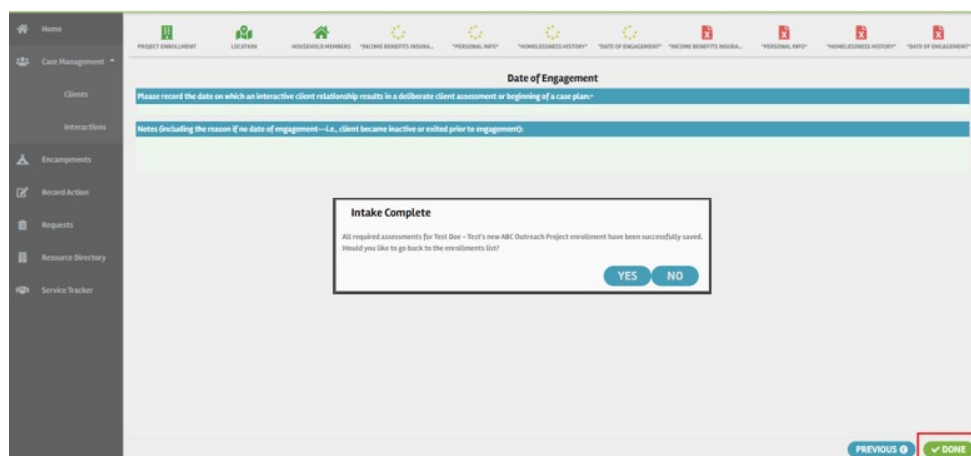
With the information you have available, update the Homelessness History fields. Select **Next**.

Step 20: Date of Engagement

With the information you have available, update the Date of Engagement fields. Select **Next**.

Step 21: Complete Enrollment

When you come to the end of the Enrollment workflow, select **Done**. Select **Yes or No** in the confirmation box to confirm that the enrollment is complete or if you would like to go back to the Enrollment list.

The screenshot shows a web application interface for a client record. The top navigation bar includes tabs for PROJECT ENROLLMENT, LOCATION, HOUSEHOLD MEMBERS, INCOME BENEFITS INSURANCE, PERSONAL INFO, HOMELESSNESS HISTORY, DATE OF ENGAGEMENT, INCOME BENEFITS INSURANCE, PERSONAL INFO, HOMELESSNESS HISTORY, and DATE OF ENGAGEMENT. The 'DATE OF ENGAGEMENT' tab is active. Below the tabs, there's a section titled 'Date of Engagement' with instructions: 'Please record the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.' and a note: 'Notes (including the reason if no date of engagement—i.e., client became inactive or exited prior to engagement)'. A confirmation dialog box titled 'Intake Complete' is displayed in the center, stating: 'All required assessments for Test One - Test's new ABC Outreach Project enrollment have been successfully saved. Would you like to go back to the enrollments list?'. The dialog has 'YES' and 'NO' buttons. At the bottom right of the form, there are 'PREVIOUS' and 'DONE' buttons, with 'DONE' highlighted by a red box.

Review Camp Stays

Within the Client Record, Use Camp Stays to review encampments associated with the client. Camp information can provide location-based context alongside the client's individual record.



Step 22: Open Camp Stays

Select Camp Stays from the client-level navigation. Click on the hamburger menu next to the camp record and select **View**.

Step 23: Review Recorded Camp Stays

Review the encampment records associated with the client and use the available information to understand the client's camp-based history or current context.

Camp Name/Status	Description	Status	Start Date	End Date	Count	Client Name	Client Address	Client Follow-up	Open Camp Requests	Open Client Requests
Cypress Creek	New Sleep drop-off...	Active	10/10/2020		1			1	3	5

Step 24: Document an Applicable Camp Connection Through the Available Workflow

When the client's Current Living Situation identifies an existing Show The Way encampment, select the applicable encampment when that option is presented. In the documented enrollment workflow, selecting an existing encampment adds the client to that encampment's client list.

Review the Care Team

Use Care Team to understand which staff members are assigned to work with the client.

Step 25: Open Care Team

Select Care Team from the client-level navigation.

Step 26: Review Assigned Staff

Review the staff members currently shown on the client's care team. Select **ADD NEW** to assign additional staff members.

Step 27: Use Care Team Information to Coordinate Work

Use the available care team information as context when determining who may already be involved with the client or when coordinating next steps based on your organizational workflow.

Review and Address Client Requests

Use the client's Requests tab to review requests or tickets tied specifically to that client.

Step 28: Open Requests

Select Requests from the client-level navigation.

Step 29: Review Client-Specific Requests

Review the requests associated with the client and open the applicable item when additional detail is needed.

Step 30: Complete Available Request Actions

Where permitted, use the available request controls to Claim Request, Update assignments, Update Status or Priority, or enter notes.

Helpful Distinction: The Requests tab inside the client record is client-specific. The main Requests module provides a broader view of requests across clients and locations.

Review and Record Services

Use Services to review services already logged for the client and, when service tracking is enabled, record additional services.

Step 31: Open Services

Select Services from the client-level navigation.

Step 31: Review Previously Logged Services

Review the service records already associated with the client.

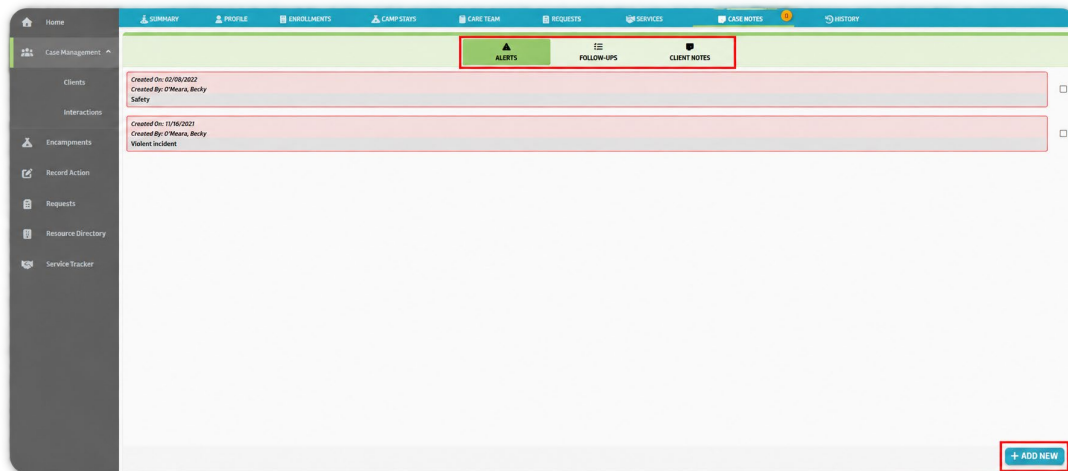
Step 33: Add a Service, If Applicable

When the Add Services option is available and a service needs to be documented, select **Add Services** and complete the configured service-entry workflow.

Feature Availability: Services and the Add Services option appear only when your organization uses service tracking. The exact service-entry fields are determined by the local configuration.

Complete Case Notes

Use Case Notes to document information that should remain visible with the client record. The documented workflow includes Alerts, Follow-Ups, and Client Notes.



Alerts

Step 34: Open Alerts

Select Case Notes, then Alerts. Review existing alerts for important information other users working with the client should know.

Step 35: Add or Update an Alert, When Appropriate

Select the add option to enter a new alert and save it. Review, edit, or close existing alerts only when appropriate and within your responsibility.

Follow-Ups

Step 36: Open Follow-Ups

Select Follow-Ups to review outstanding needs or reminders associated with the client.

Step 37: Add or Update a Follow-Up

When a new follow-up is needed, enter the applicable priority, due date, and follow-up details, then save the record. Close completed follow-ups so other users can see that the need has been addressed.

Client Notes

Step 38: Open Client Notes

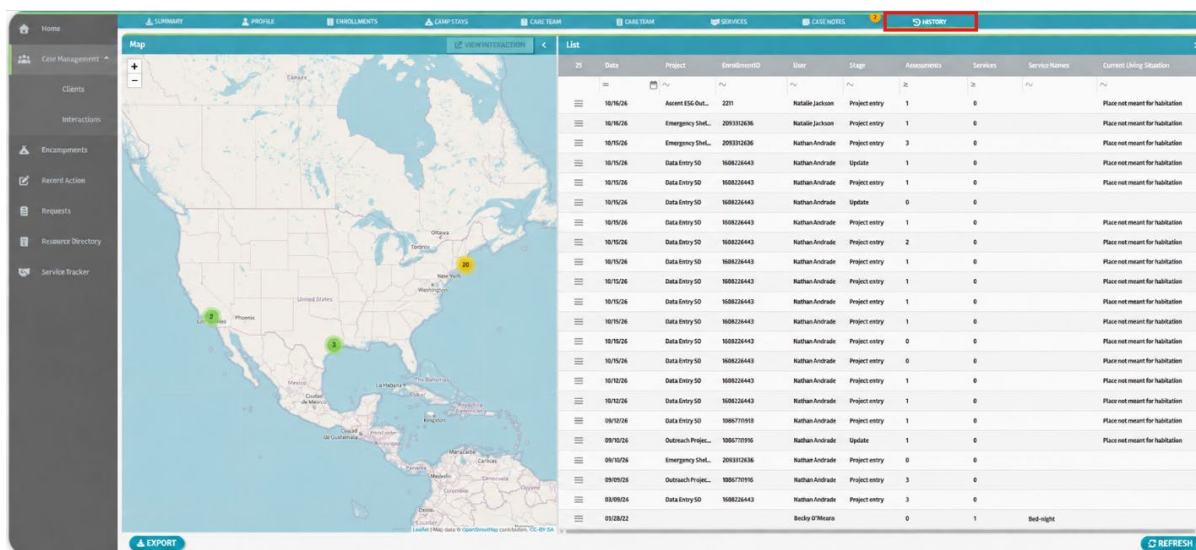
Select Client Notes/Notes to review general case notes previously recorded for the client.

Step 39: Add a Client Note

Use the add option to enter the note and save it. Follow your organization's procedures when editing or removing existing notes.

Review Client History

Finish the client-record review by using History to understand previous interactions, submitted information, and geographic patterns.



ID	Date	Project	Enrollment ID	User	Stage	Assessments	Services	Service Name	Current Living Situation
10/16/24	Assess EIS-Out...	2201	Nathalie Jackson	Project entry	1	0			Place not meant for habitation
10/16/24	Emergency Shet...	209312636	Nathalie Jackson	Project entry	1	0			Place not meant for habitation
10/16/24	Emergency Shet...	209312636	Nathan Andrade	Project entry	3	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Update	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Update	0	0			
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	2	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	0	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	0	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
10/16/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
09/17/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	1	0			Place not meant for habitation
09/17/24	Outreach Project...	N08026443	Nathan Andrade	Update	1	0			Place not meant for habitation
09/17/24	Emergency Shet...	209312636	Nathan Andrade	Project entry	0	0			
09/19/24	Outreach Project...	N08026443	Nathan Andrade	Project entry	3	0			
09/19/24	Data Entry SO	N08026443	Nathan Andrade	Project entry	3	0			
01/28/22			Becky O'Meara		0	1		Bed-night	

Step 39: Open History

Select History from the client-level navigation. The documented client-record workflow provides List View and Map View for prior interactions.

Step 40: Review Previous Interactions

In List View, review prior interactions, including the interaction date, user who recorded it, and available information about activity completed during the interaction.

Step 41: Open an Interaction for More Detail

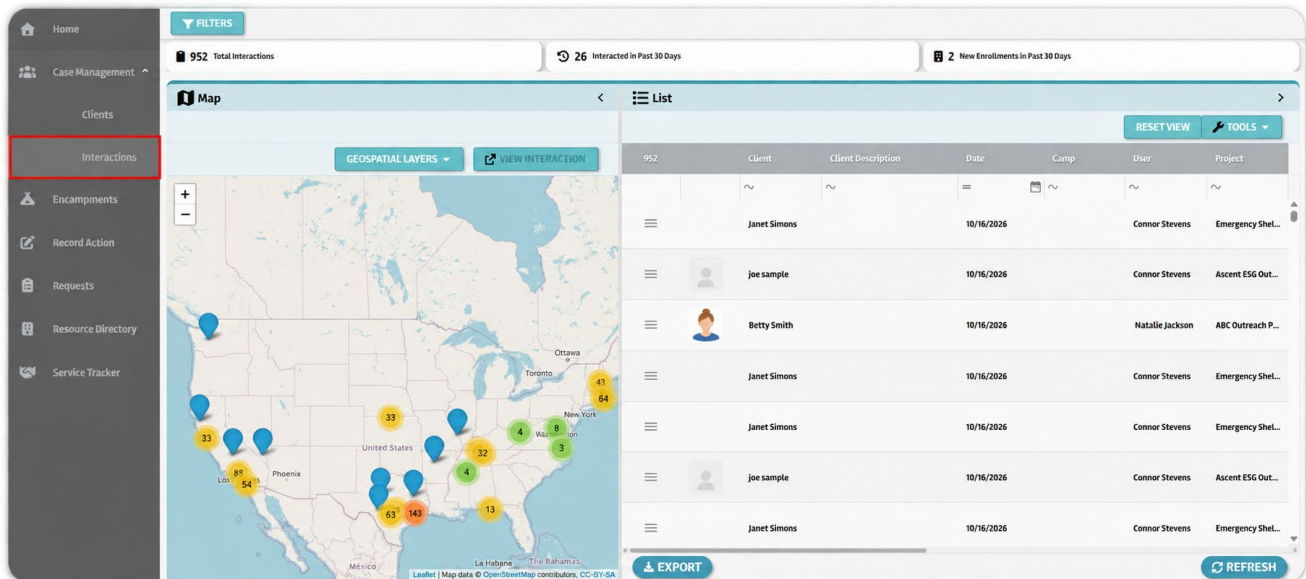
Select an interaction to review its details, including the recorded location and available staff information.

Step 42: Review Historical Assessments

Open a listed assessment or survey when you need to review information submitted during a previous interaction.

Interactions

From the Main Navigation, under Case Management, the Interactions page provides a cross-client view of recorded interactions, allowing users to review activity across clients rather than the history of one individual. Use the available views and filters to locate and review previous interactions.



Step 1: Open Interactions

From the navigation pane, select Case Management > Interactions.

Step 2: Review Prior Activity

Review previous interactions using the available grid or map view.

Step 3: Narrow the Information Displayed

Use available filters or search options to focus on the interactions you need to review.

Step 4: Review the Interaction History

Use previous activity to understand what has already occurred and identify potential next steps.

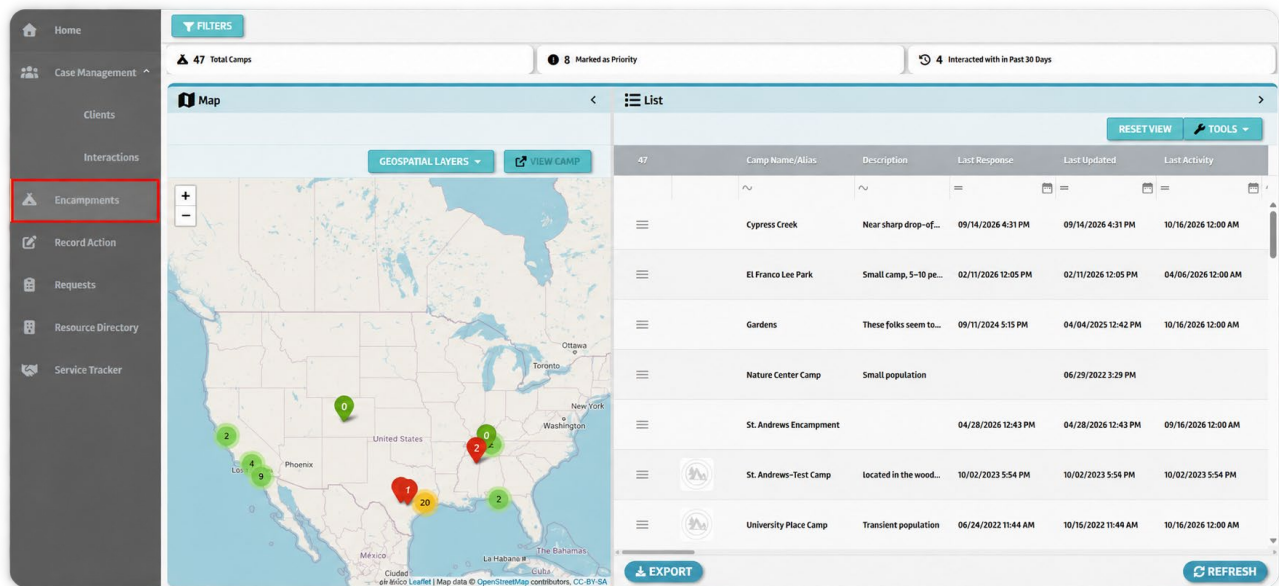
Step 5: Continue Client-Level Work, If Needed

If additional information needs to be recorded for a specific client, open the client's record and start a new interaction from the client profile.

Helpful Tip: Interactions shows activity across clients, while the History tab within a client profile shows activity for that individual client.

Encampments

The Encampments page provides access to recorded encampment information through Map and List views. From either view, users can locate an encampment and open its record for additional information or related work.



Step 1: Open Encampments

From the navigation pane, select Encampments.

Step 2: Choose a View

Select the Map or List view based on how you want to locate the encampment.

Step 3: Locate the Encampment

In Map view, review camp location markers, which may be color-coded by status. In List view, use the available sorting and filtering tools to narrow the records displayed.

Step 4: Open the Encampment Record

Select the appropriate encampment to open its record.

Step 5: Review Camp Information

Review available information, including the camp's name, location, photo gallery, and tags.

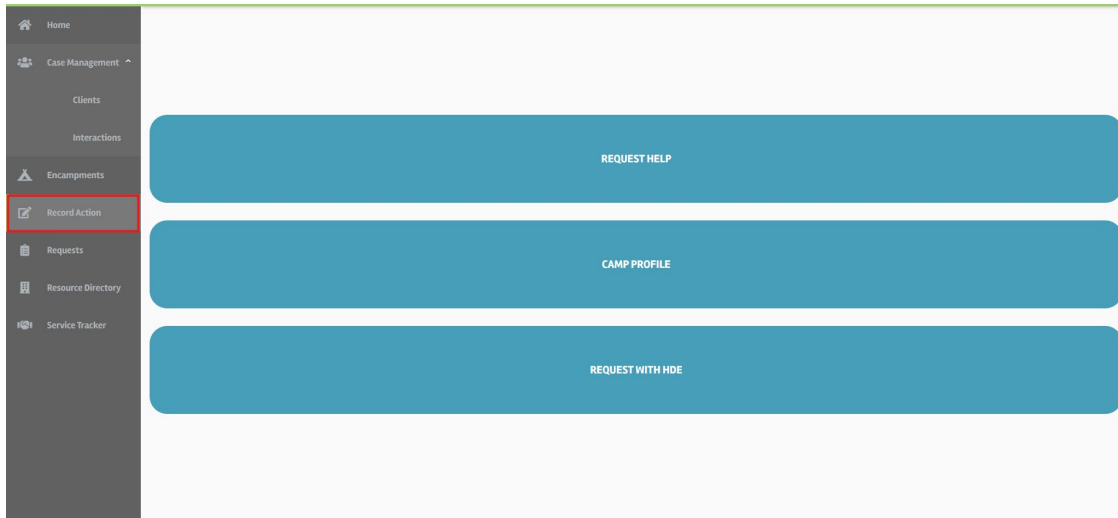
Step 6: Continue Related Work

Update applicable camp details or continue into client-level work associated with the encampment as needed.

Helpful Tip: Start with Encampments when your work centers on a camp or location rather than a specific client.

Record Action

The Record Action page is used to complete available surveys and create records outside of a specific client workflow. The survey options displayed depend on the actions configured for your organization.



Step 1: Open Record Action

From the navigation pane, select Record Action.

Step 2: Review Available Actions

Review the available survey or action buttons, which may be organized by category.

Step 3: Select a Survey or Action

Choose the survey or action you want to complete.

Step 4: Complete the Guided Questions

Follow the step-by-step wizard and answer each applicable question.

Step 5: Continue Through Conditional Questions

Continue through the questions as prompted. If the survey contains conditional or branching questions, the wizard automatically adjusts based on the responses entered.

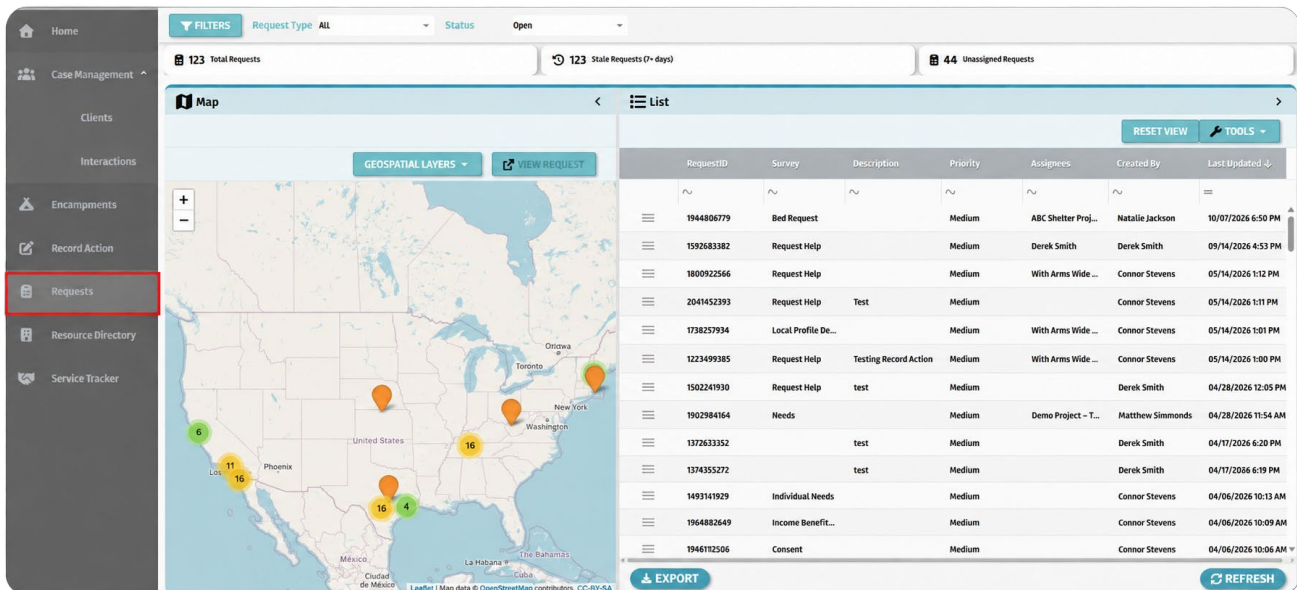
Step 6: Save or Submit the Record

Review the information entered and save or submit the record when complete.

Helpful Tip: Use Record Action when you need to create a standalone survey-style record rather than review an existing client record.

Requests

The Requests page is used to manage service or support requests. Users can review open requests in a filterable List view or use the Map view to see request locations.



Step 1: Open Requests

From the navigation pane, select Requests.

Step 2: Choose a View

Use the List tab to review and triage open requests, or select the Map tab to view request locations as map markers with popup details.

Step 3: Locate the Request

In List view, use the available sorting and filtering tools to narrow the open requests displayed. In Map view, review where requests are located or concentrated.

Step 4: Open the Request

Select the appropriate request to review its details.

Step 5: Take the Appropriate Action

Based on the request, assign it to yourself or another user, add a note, or complete the applicable follow-up.

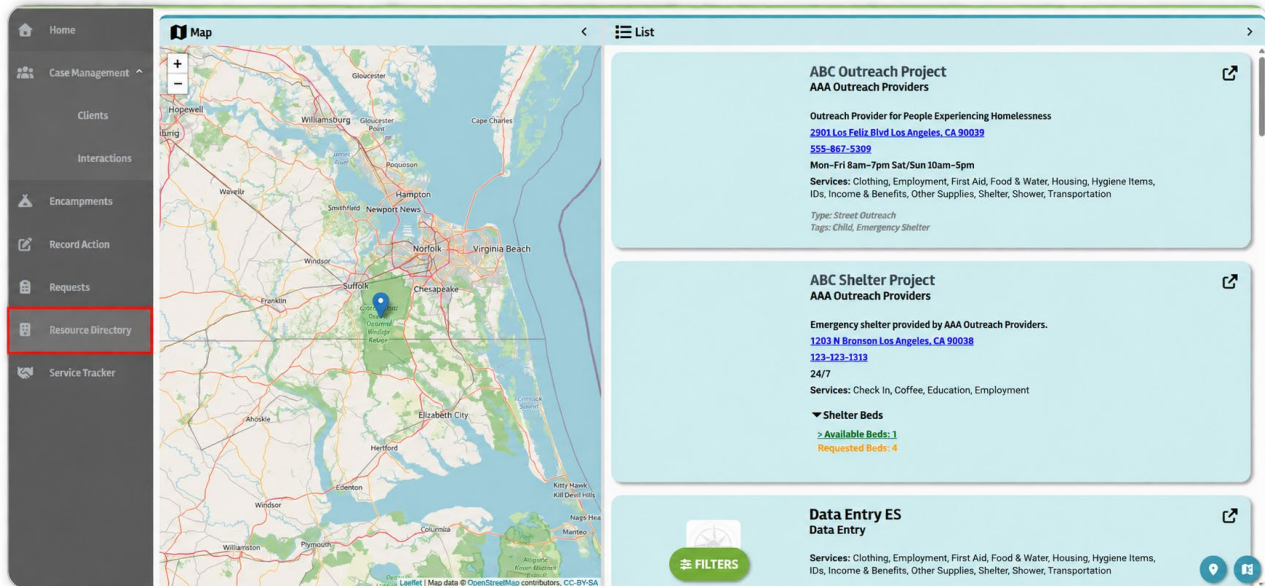
Step 6: Close the Request When Resolved

Once the request has been addressed, mark it complete or closed.

Helpful Tip: Use Requests when handling incoming needs, reviewing open work items, or coordinating follow-up on a request that requires attention.

Resource Directory

The Resource Directory helps users find services and organizational resources for clients. Resources can be explored in Map or List view and filtered by resource type to identify appropriate support.



Step 1: Open the Resource Directory

From the navigation pane, select Resource Directory.

Step 2: Search or Browse Available Resources

Use the Map or List view to search or browse the resources available in the directory.

Step 3: Filter by Resource Type, If Needed

Narrow the results by resource type when looking for a specific kind of support. Available types may include general resources, public resources, referral resources, or datastore-specific services.

Step 4: Open a Resource

Select the appropriate resource to review additional information by clicking the symbol indicated above.

Step 5: Review Resource Details

Review the available contact information, services offered, hours, and eligibility information.

Step 6: Use the Resource as the Next Step

Use the information to support the client's next step, such as connecting the client with the service or making a referral.

Managing Unit and Bed Inventory

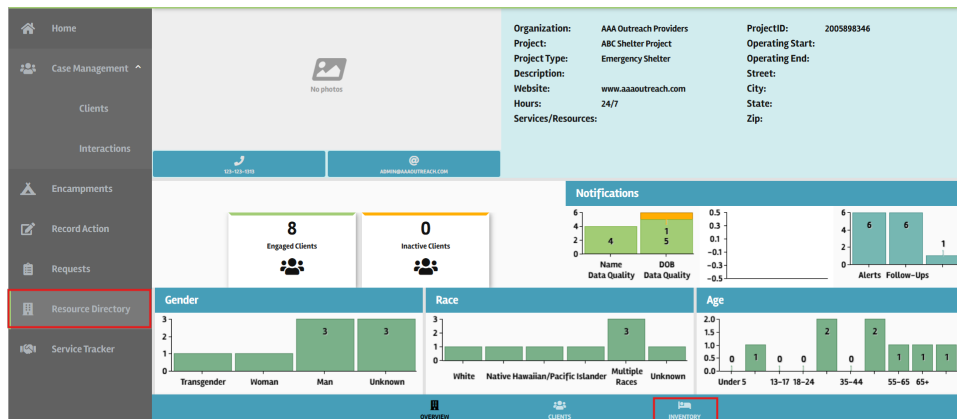
Use these instructions to create and maintain unit and bed inventory for a project in Show The Way.

Important Note: Before creating bed inventory, open the appropriate project.

- Create the unit before setting up the associated bed profile and beds.
- Both units and beds must include an end date to appear in the Resource Directory.
- Household Type is used to account for the presence or absence of children.
- Population identifies a group for whom beds are reserved; a specific subpopulation is not required for a bed to be created.
- Use the bed profile to create the appropriate number of beds with the same profile information.
- Use the hamburger drop-down beside an existing inventory item when edits or adjustments are needed.

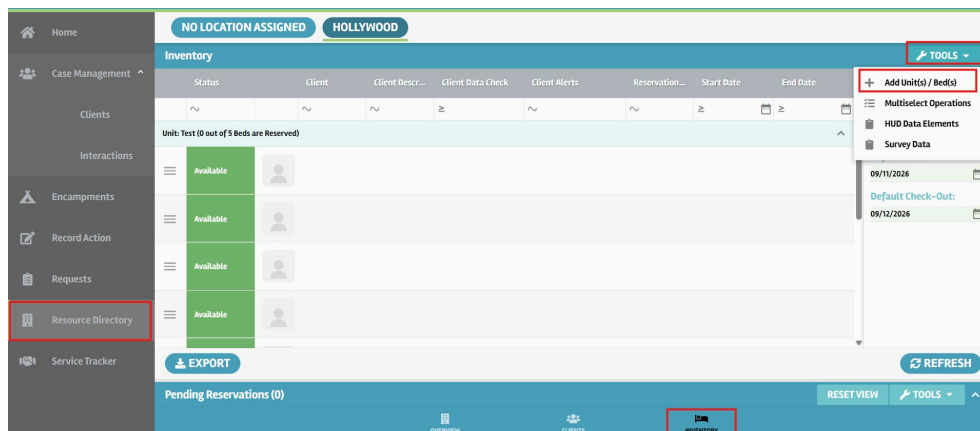
Step 1: Open the Project Inventory

Open the appropriate project in Show The Way and navigate to the Inventory button at the bottom of the project page.



Step 2: Open the Unit Setup

From the Inventory area, select Tools above the inventory list. From the available options, select Add Unit. Note the Location Selector at the top, units and beds added will assigned to the selected location.



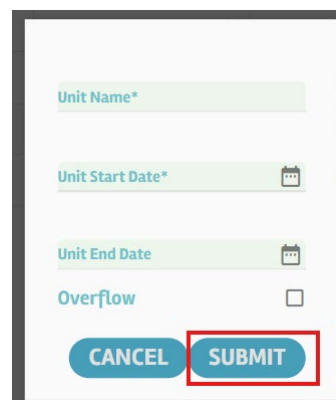
Step 3: Creating a Unit - Select Add New

On the unit page, select Add New near the bottom of the screen to begin creating a unit.

Step 4: Enter the Unit Information

In the pop-up window, enter the unit name and the required information. **Submit** the information to create the unit.

Important Note: Include an end date for the unit. The training states that both units and beds must have an end date in order to appear in the Resource Directory.



date

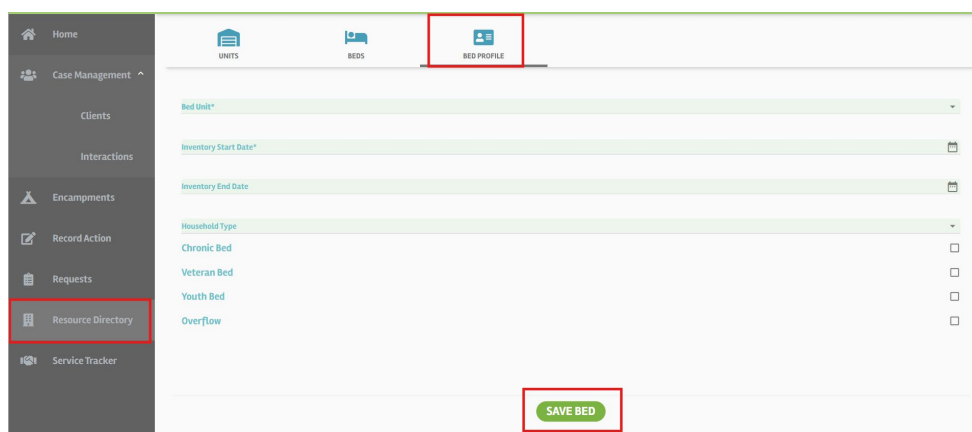
Profile

Step 5: Creating the Bed Profile and Beds - Open Bed

After the unit information has been submitted, select Bed Profile at the top of the page to begin setting up the beds associated with the unit.

Step 6: Complete the Bed Details

Enter the additional information requested for the bed profile. Review the Household Type and Population options and select the values that apply to the beds being created.



Helpful Guidance: Household Type reflects the presence or absence of children within the unit. Population identifies the group for whom the beds are reserved. Beds do not have to be associated with a specific subpopulation in order to be created.

Step 7: Save the Bed and Enter the Number of Beds

Select Save Bed. When prompted, enter the number of beds you want to create using the completed bed profile and submit the information.

Step 8: Confirm the Beds Were Added

Review the inventory to confirm that the beds were successfully created and added to the project.

Step 9: Edit or Adjust Inventory, If Needed

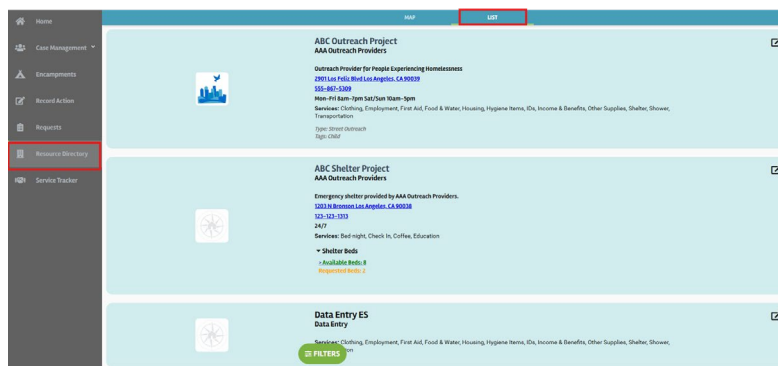
If a unit or bed requires an edit or adjustment, use the hamburger drop-down menu located to the left of the applicable inventory item and select the appropriate action.

Checking in a Pending Bed Reservation

Use this workflow from the receiving project to locate a pending bed request, confirm the reservation, and check the client into the bed.

Step 1: Open the Resource Directory

After signing in, select Resource Directory from the navigation pane and switch to List View.

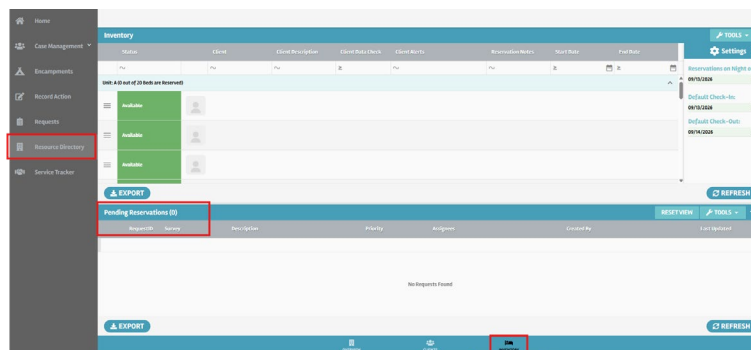


Step 2: Open the Project

Locate the organization that has the requested bed and open the applicable project.

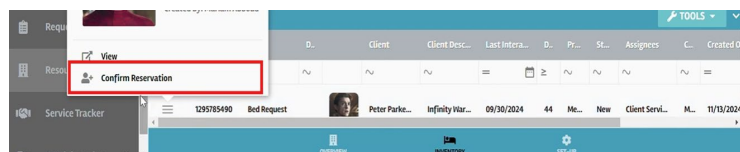
Step 3: Open Inventory

From the project, select the Inventory tab to review the bed request and confirm that it is pending.



Step 4: Confirm the Reservation

Locate the client's pending reservation. Select the hamburger menu to the left of the client's details and choose the option to confirm the reservation.

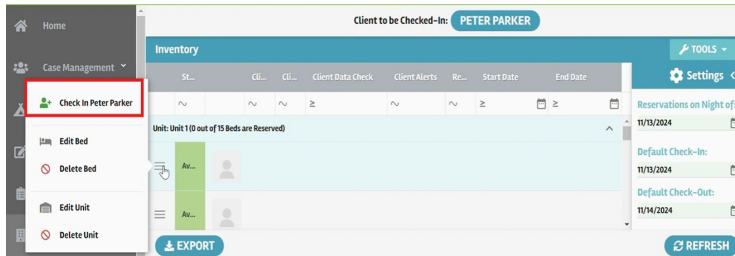


Step 5: Open the Reservation Menu Again

After the reservation is confirmed, select the hamburger menu again to access the next available action.

Step 6: Check In the Client

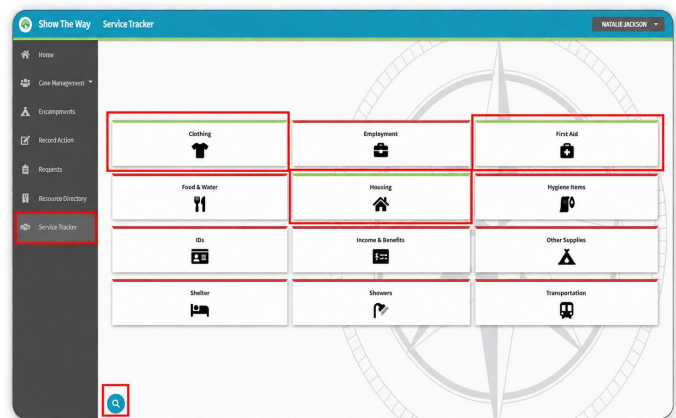
Choose the check-in action to complete the client's bed check-in.



Using the Service Tracker

The Service Tracker provides a streamlined way to record services for one or multiple clients. It is especially useful when the same services are being provided to several people, such as during outreach, at a service center, or while working at an encampment.

Before You Begin: The Service Tracker can display up to 12 services at one time. Available services depend on how services have been configured for your project or resource.



Step 1: Open the Service Tracker

From the application, open the navigation menu and select **Service Tracker**.

Step 2: Review the Available Services

The Service Tracker can display up to **12 services at a time**. If your project has more than 12 available services, select the **Services** button to choose which services should appear on the Service Tracker screen.

Step 3: Select the Services to Display

Check or uncheck the applicable services, then select **Confirm**. Only the services you selected will appear on the Service Tracker screen.

Step 4: Select the Services Being Provided

Select each service you want to record for the client or clients. Services display a **red stripe** by default; when selected, the stripe changes to **green**, indicating that the service will be applied.

Step 5: Search for the Client

Select the **Search** icon in the lower-left corner and locate the client who received the selected services. If the client is not already in Show The Way, the workflow also provides an option to create a new client.

Step 6: Select the Client

Select the appropriate client from the search results, then select **View Client**.

Step 7: Complete the Location Step

Continue through the location screen presented as part of the workflow.

Step 8: Confirm the Services Were Applied

After completing the location step, return to the Service Tracker and look for the **Success** message at the bottom of the screen. This confirms that the selected services were applied to the client.

Step 9: Repeat for Additional Clients

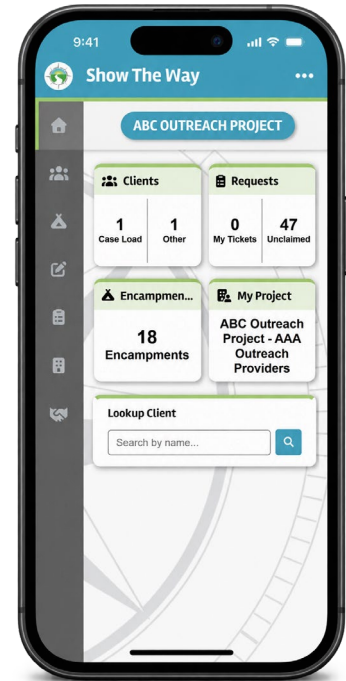
If the same services were provided to other clients, repeat the client search and selection process for each person. You do not need to reselect the services for each client as long as you are continuing to apply the same selected services.

Show the Way Mobile Overview

Home Page

The Home page is the landing page displayed after signing in to the Show The Way Website/Desktop App. It provides quick access to common client and project functions, while the left-side navigation pane provides access to the primary application workflows.

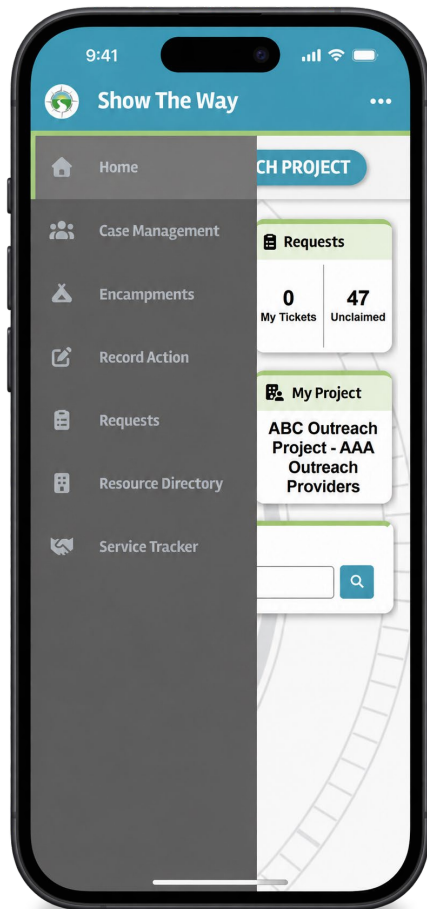
Important Note: The features available to an individual user may vary based on their datastore, project assignments, and permissions.



#	Item	What It Does
1	Project Assignment	Displays the name of the project you are currently working in. Confirm the correct assignment before beginning work.
2	Clients	Displays clients with whom you have interacted, created, or enrolled in a project. Clients you only searched for, or whose personal information you updated without beginning an interaction, may not appear here.
3	Requests	Displays requests assigned to you, your team, or your project, depending on how the project is configured.
4	Encampments	Displays the number of active Encampments.
5	My Project	Displays the name of the project you are currently working in.
6	More Menu	The three-dot menu provides access to My Settings, My Account, My Interactions, and Sign Out. Use My Settings to review or switch assignments when more than one assignment is available.

Navigation Pane Overview

The left-side navigation pane remains available throughout the Website/Desktop App. Select the Show The Way logo to expand the pane and view the full feature names.

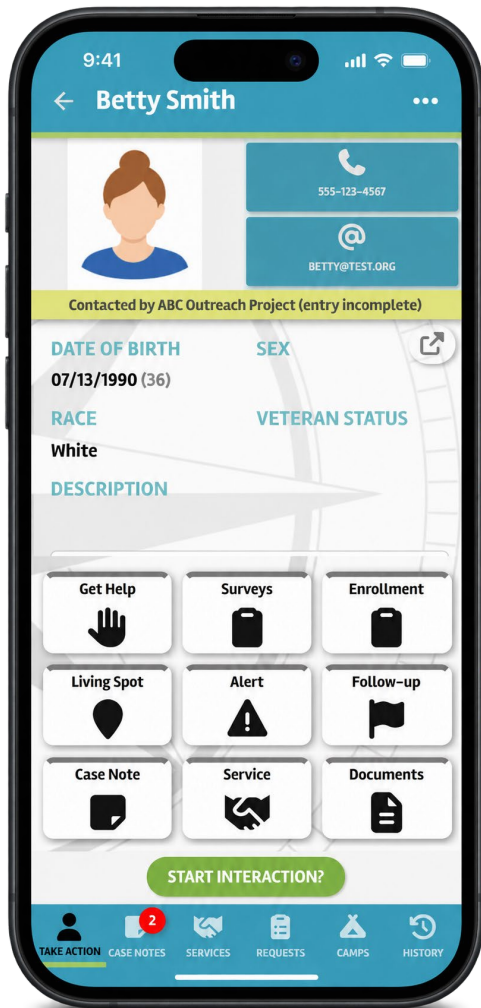


Navigation Item	Purpose
Home	Returns you to the main landing page after signing in.
Case Management	Opens client-focused tools used to look up clients, select from your client list, and work with client records.
Encampments	Opens the community encampment map and list. Use this area to view encampment pins, switch between map and list views, search for encampments, and add a new encampment when permitted.
Record Action	Provides options for recording activity that is not necessarily tied to a specific client, including Request Help and Known Locations Survey workflows. Available options may depend on local configuration.
Requests	Displays the datastore's open requests. Use list or map view and available search or filter options to locate and review requests.
Resource Directory	Opens the Resource Directory in map view, with an option to switch to list view. Use it to locate projects and community resources, including resources available to clients and shelters that provide beds.
Service Tracker	Supports applying or recording services for more than one client at a time, while also allowing use for an individual client.

Understanding the Client Profile

The Client Profile organizes client information into tabs, so you can review details, history, services, requests, and related records.

Role-Based Visibility: Some tabs may not appear for every user. For example, Case Notes and History are hidden for First Responders.

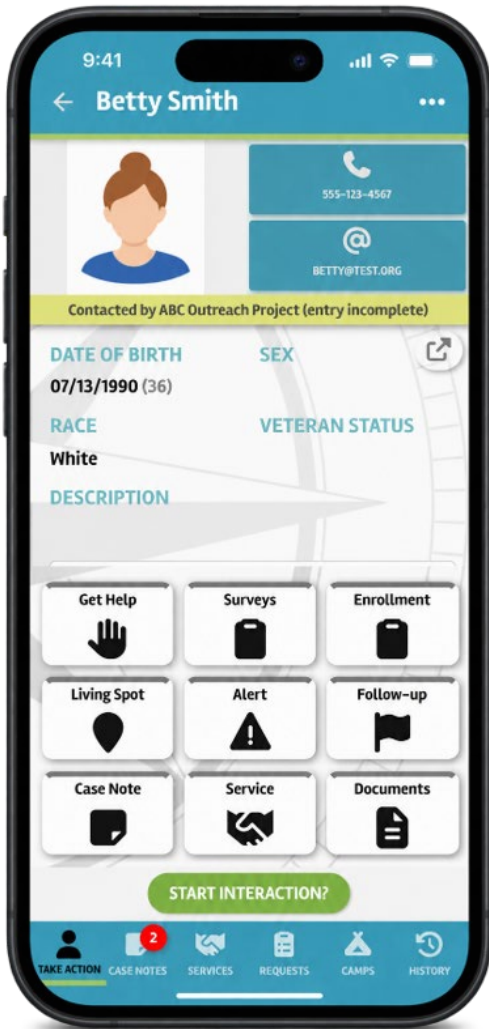


Client Profile Tab	Information Available
Take Action	This tab serves as the main page of the Client Profile. From here, users can access available case management tools to record information or take action on behalf of the client.
Case Notes	Tab containing Alerts, Follow-Ups, and Client Notes. Each section includes its own Add button; the tab may show a badge for open alerts.
Services	Services already logged for the client and, when enabled, an Add Services button for recording a new service.
Requests	Requests or tickets tied specifically to the client.
Camps	Grid of encampments where the client has stayed.
History	Combined map and grid of the client's past interactions, including date, user, project, and distance from the client's known location.

Understanding the Client Profile

The Client Profile organizes client information into tabs, so you can review details, history, services, requests, and related records.

Role-Based Visibility: Some tabs may not appear for every user. For example, Case Notes and History are typically hidden for First Responders



Client Profile Button	Information Available
Get Help	Allows users to complete a bed request for the client or search for general resource information.
Surveys	Allows users to complete available surveys for the client.
Enrollment	Allows users to enroll the client in an available project.
Living Spot	Allows users to record or update current living situation information about where the client is currently staying.
Alert	Allows users to create an alert associated with the client.
Follow-Up	Allows users to create a follow-up reminder associated with the client.
Case Note	Allows users to record a new case note for the client.
Service	Allows users to record a service provided to the client.
Documents	Allows users to access and upload documents.

Accessing the Client Record

Step 1: Open Case Management

Open Case Management and locate the client using the workflow available to you, such as Clients, Lookup Client, or My Clients.

Step 2: Confirm You Have the Correct Client

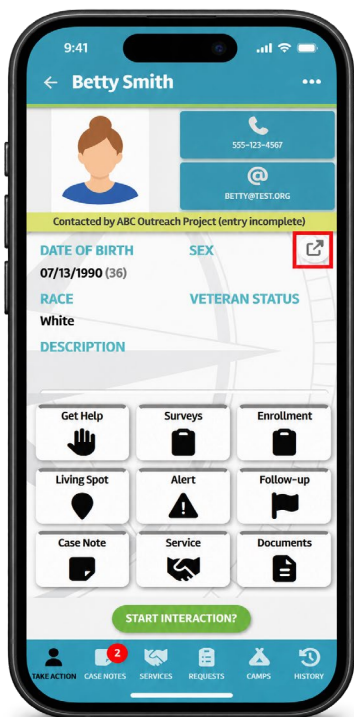
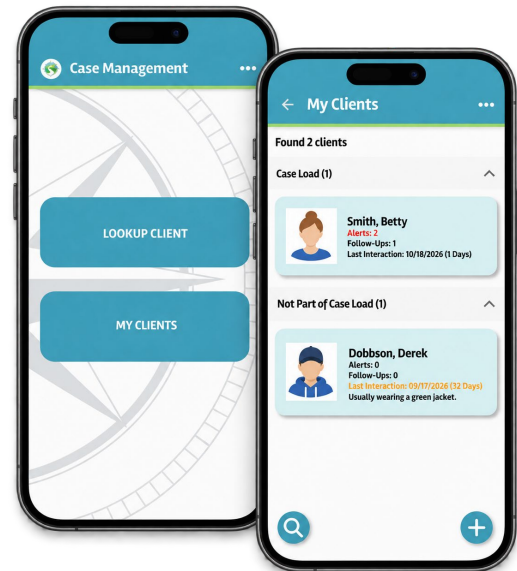
Review the client's identifying information to confirm. Select **View Client** to open the client profile.

Complete the Client Profile

Review and maintain the client's core record before moving into project- or service-specific information.

Step 3: Open Profile

Select Profile from the client-level navigation.



Step 4: Open Client Details

Open Client Details to review the client's complete profile and make changes when needed.

Step 5: Review and Update Client Information

Complete as much information as is currently available. Depending on the configured fields, this may include identifying information, demographics, contact information, and other client details.

Step 6: Add Contact Information When Available

Enter or update the client's phone number and email address when known. Contact shortcuts may become available when this information is present.

Step 7: Review Tags or Priority Information

Apply or update available tags when appropriate for your local workflow. Priority clients may display a priority indicator in applicable client lists.

Step 8: Save Client Details

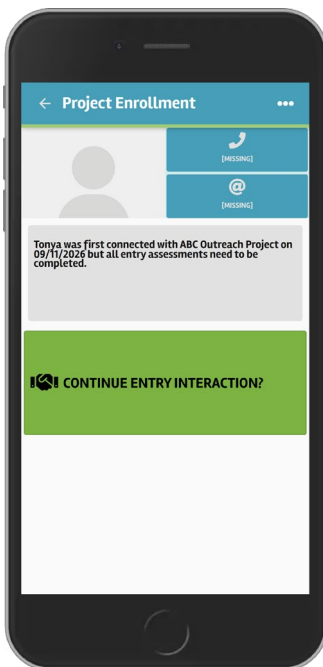
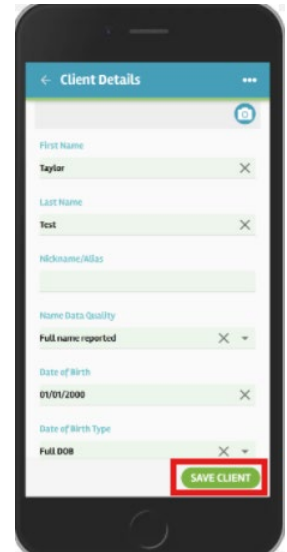
Select Save Client after adding or changing information on the Client Details page.

Important Note: Show The Way supports progressive data collection. The client record can be maintained over time as additional information becomes available.

Step 9: Complete Other Client Details, If Applicable

Open Other Client Details to review any additional client-level surveys configured for your community. Select the applicable survey, enter the available information, and submit it.

Best Practice: Review the Profile first so the client's core information is as current as possible before you document enrollment, service, request, or case-management activity.



Review and Maintain Enrollments

Use Enrollments to review the client's project enrollment information. For communities using expanded HMIS enrollment workflows, enrollment data may include entry, update, and exit stages. Enrollment data is tied to the active project assignment.

Step 10: Open Enrollments

Select Enrollments from the client-level navigation and review the enrollment records associated with the client.

Step 11: Confirm the Correct Project

Before entering or updating enrollment data, confirm that your Active Assignment matches the project where the information should be recorded.

Step 12: Review the Enrollment Status

Determine whether the client is beginning an enrollment, has an active enrollment, is completing an exit, or is being re-enrolled.

Important Note: Show The Way uses progressive data collection. A partially completed survey can be submitted and completed during a later interaction.

Understanding Assessment Colors

Color	Meaning
Red	No information has been collected on the survey yet.
Yellow	Some information may be complete, but one or more required fields still need responses.
Green	All required fields for the survey have been completed.

Step 13: Complete Applicable Enrollment Assessments

Follow the enrollment workflow for the selected project by selecting **ADD NEW** on the Enrollments tab. Complete the applicable Entry, Update, or Exit Assessment and submit the information currently available.

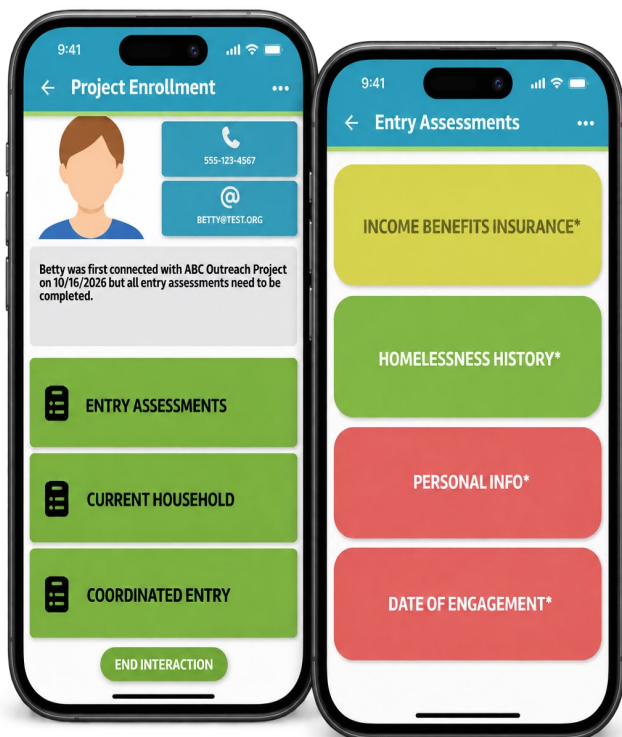
Step 14: Record the Current Living Situation

When prompted, review the Information Date and update it if back data entry is needed. Select where the client is sleeping. If the client is staying in an existing Show The Way encampment, select that encampment from the available list to add the client to the camp. Select **Save or Next** to continue.

Important Note: If the information is not available, even for required fields, you can still select **Save** and continue. Required fields are indicated with an *

Step 15: Update Household Members

Click the + at the bottom right of the screen to add additional household members to the project enrollment. Select **Next**.



Step 16: Income, Benefits, and Insurance Information

With the information you have available, enter the information to update the enrollment. Select **Next**.

Step 17: Personal Information

With the information you have available, update the personal information fields. Select **Next**.

Step 18: Homelessness History

With the information you have available, update the Homelessness History fields. Select **Next**.

Step 19: Date of Engagement

With the information you have available, update the Date of Engagement fields. Select **Next**.

Step 20: Complete Enrollment

When you come to the end of the Enrollment workflow, select **Done**. Select **Yes or No** in the confirmation box to confirm that the enrollment is complete or if you would like to go back to the Enrollment list.

Review Camp Stays

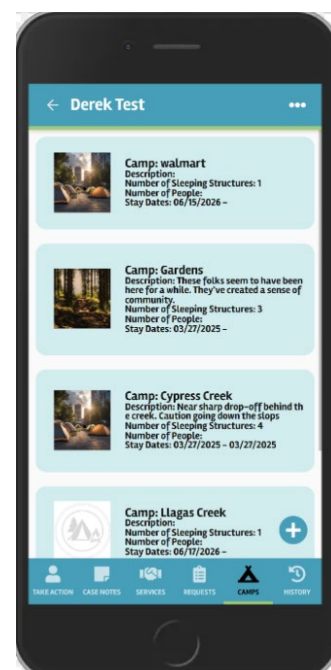
Use Camp Stays to review encampments associated with the client. Camp information can provide location-based context alongside the client's individual record. Camp Stays can be used as supporting context. The exact controls available from this tab may vary by implementation.

Step 21: Open Camp Stays

Select Camp Stays from the client-level navigation.

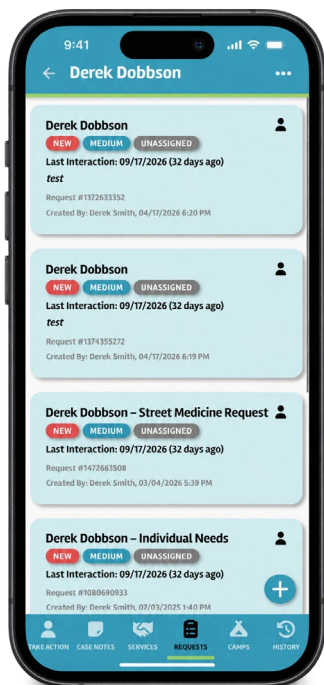
Step 22: Review Recorded Camp Stays

Review the encampment records associated with the client and use the available information to understand the client's camp-based history or current context.



Step 23: Document an Applicable Camp Connection Through the Available Workflow

When the client's Current Living Situation identifies an existing Show The Way encampment, select the applicable encampment when that option is presented. In the documented enrollment workflow, selecting an existing encampment adds the client to that encampment's client list.



Review and Address Client Requests

Use the client's Requests tab to review requests or tickets tied specifically to that client.

Step 24: Open Requests

Select Requests from the client-level navigation.

Step 25: Review Client-Specific Requests

Review the requests associated with the client and open the applicable item when additional detail is needed.

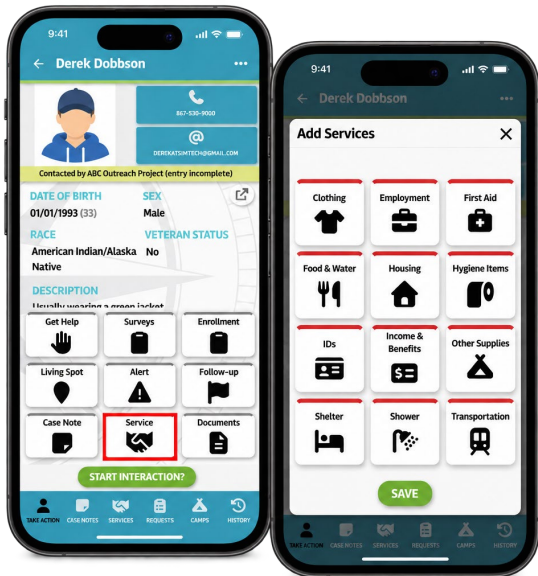
Step 26: Complete Available Request Actions

Where permitted, use the available request controls to document follow-up, assignment, notes, or resolution.

Helpful Distinction: The Requests tab inside the client record is client-specific. The main Requests module provides a broader view of requests across clients and locations.

Review and Record Services

Use Services to review services already logged for the client and, when service tracking is enabled, record additional services.



Step 27: Open Services

Select Services from the client-level navigation.

Step 28: Review Previously Logged Services

Review the service records already associated with the client.

Step 29: Add a Service, If Applicable

When the Add Services option is available and a service needs to be documented, select Add Services and complete the configured service-entry workflow.

Feature Availability: Services and the Add Services option appear only when your organization uses service tracking. The exact service-entry fields are determined by the local configuration.

Complete Alerts, Follow-Ups and Case Notes

Use Case Notes to document information that should remain visible with the client record. The documented workflow includes Alerts, Follow-Ups, and Client Notes.

Alerts

Step 30: Open Alerts

Select Case Notes, then Alerts. Review existing alerts for important information other users working with the client should know.

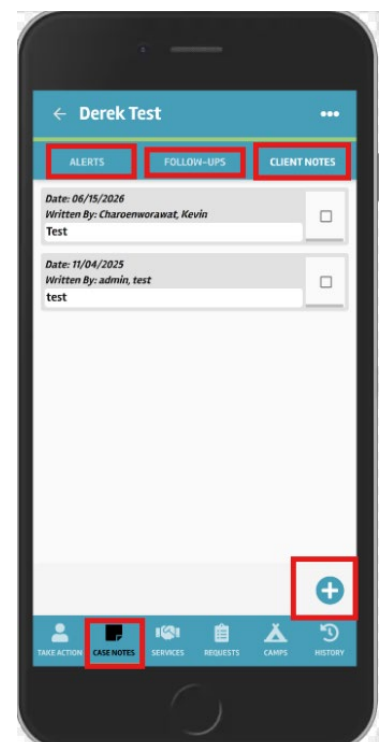
Step 31: Add or Update an Alert, When Appropriate

Select the add option to enter a new alert and save it. Review, edit, or close existing alerts only when appropriate and within your responsibility.

Follow-Ups

Step 32: Open Follow-Ups

Select Follow-Ups to review outstanding needs or reminders associated with the client.



Step 33: Add or Update a Follow-Up

When a new follow-up is needed, enter the applicable priority, due date, and follow-up details, then save the record. Close completed follow-ups so other users can see that the need has been addressed.

Client Notes

Step 34: Open Client Notes

Select Client Notes/Notes to review general case notes previously recorded for the client.

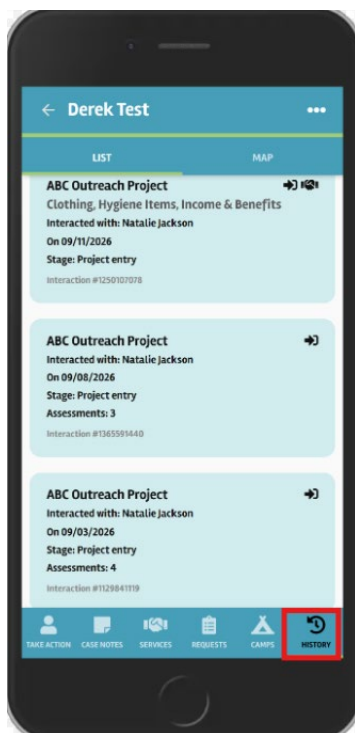
Step 35: Add a Client Note

Use the add option to enter the note and save it. Follow your organization's procedures when editing or removing existing notes.

Best Practice: Review existing Alerts and Follow-Ups before adding new ones. This helps reduce duplicate work and gives you context about outstanding needs.

Review Client History

Finish the client-record review by using History to understand previous interactions, submitted information, and geographic patterns.



Step 34: Open History

Select History from the client-level navigation. The documented client-record workflow provides List View and Map View for prior interactions.

Step 35: Review Previous Interactions

In List View, review prior interactions, including the interaction date, user who recorded it, and available information about activity completed during the interaction.

Step 36: Open an Interaction for More Detail

Select an interaction to review its details, including the recorded location and available staff information.

Step 37: Review Historical Assessments

Open a listed assessment or survey when you need to review information submitted during a previous interaction.

Important Note: Historical assessment responses can be reviewed from History but are not edited from this area.

Encampments

The Encampments page provides access to recorded encampment information through Map and List views. From either view, users can locate an encampment and open its record for additional information or related work.

Step 1: Open Encampments

From the navigation pane, select **Encampments**.

Step 2: Choose a View

Select the Map or List view based on how you want to locate the encampment.

Step 3: Locate the Encampment

In Map view, review camp location markers, which may be color-coded by status. In List view, use the available sorting and filtering tools to narrow the records displayed.

Step 4: Open the Encampment Record

Select the appropriate encampment to open its record.

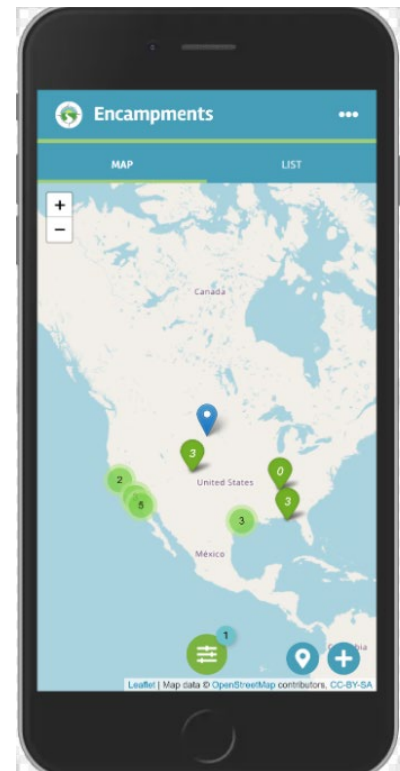
Step 5: Review Camp Information

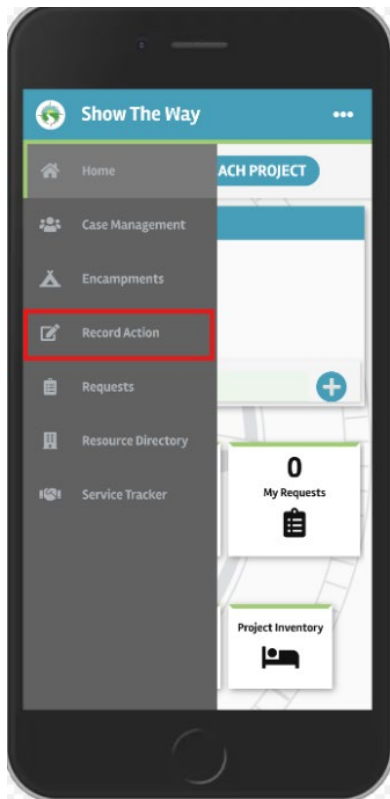
Review available information, including the camp's name, location, photo gallery, and tags.

Step 6: Continue Related Work

Update applicable camp details or continue into client-level work associated with the encampment as needed.

Helpful Tip: Start with Encampments when your work centers on a camp or location rather than a specific client.





Record Action

The Record Action page is used to complete available surveys and create records outside of a specific client workflow. The survey options displayed depend on the actions configured for your organization.

Step 1: Open Record Action

From the navigation pane, select Record Action.

Step 2: Review Available Actions

Review the available survey or action buttons, which may be organized by category.

Step 3: Select a Survey or Action

Choose the survey or action you want to complete.

Step 4: Complete the Guided Questions

Follow the step-by-step wizard and answer each applicable question.

Step 5: Continue Through Conditional Questions

Continue through the questions as prompted. If the survey contains conditional or branching questions, the wizard automatically adjusts based on the responses entered.

Step 6: Save or Submit the Record

Review the information entered and save or submit the record when complete.

Helpful Tip: Use Record Action when you need to create a standalone survey-style record rather than review an existing client record.

Requests

The Requests page is used to manage service or support requests. Users can review open requests in a filterable List view or use the Map view to see request locations.

Step 1: Open Requests

From the navigation pane, select **Requests**.

Step 2: Choose a View

Use the List tab to review and triage open requests, or select the Map tab to view request locations as map markers with popup details.

Step 3: Locate the Request

In List view, use the available sorting and filtering tools to narrow the open requests displayed. In Map view, review where requests are located or concentrated.

Step 4: Open the Request

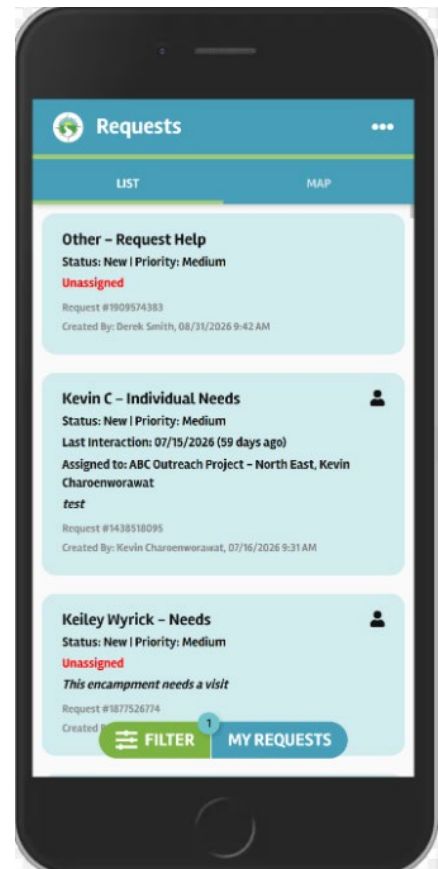
Select the appropriate request to review its details.

Step 5: Take the Appropriate Action

Based on the request, assign it to yourself or another user, add a note, or complete the applicable follow-up.

Step 6: Close the Request When Resolved

Once the request has been addressed, mark it complete or closed.



Helpful Tip: Use Requests when handling incoming needs, reviewing open work items, or coordinating follow-up on a request that requires attention.

Resource Directory

The Resource Directory helps users find services and organizational resources for clients. Resources can be explored in Map or List view and filtered by resource type to identify appropriate support.

Step 1: Open the Resource Directory

From the navigation pane, select Resource Directory.

Step 2: Search or Browse Available Resources

Use the Map or List view to search or browse the resources available in the directory.

Step 3: Filter by Resource Type, If Needed

Narrow the results by resource type when looking for a specific kind of support. Available types may include general resources, public resources, referral resources, or datastore-specific services.

Step 4: Open a Resource

Select the appropriate resource to review additional information.

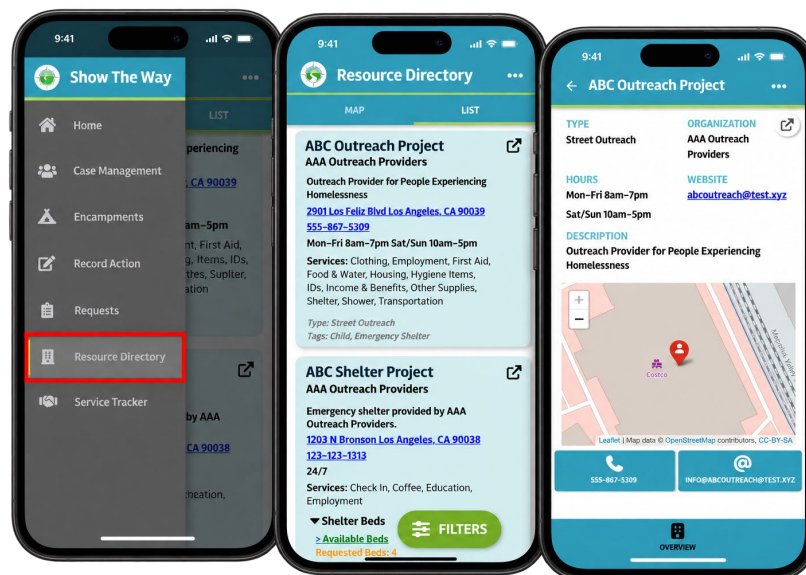
Step 5: Review Resource Details

Review the available contact information, services offered, hours, and eligibility information.

Step 6: Use the Resource as the Next Step

Use the information to support the client's next step, such as connecting the client with the service or making a referral.

Helpful Tip: Use the Resource Directory when connecting a client to a service, researching available supports, or identifying an appropriate next step for a client need.



Referring a Client to an Available Bed

To request an available bed for a client and then complete the reservation and check-in process from the receiving project's inventory. **Before You Begin:** The available options shown in these workflows depend on bed inventory already being configured for the project and on the user's access to the applicable client, Resource Directory, and project inventory functions.

Use this workflow when an existing client needs to be referred to a bed that is available through a resource in the Resource Directory.

Step 1: Open Lookup Client

After signing in to Show The Way, select Lookup Client to open the client search area.

Step 2: Search for the Client

Select Search to display saved clients. Locate the client in the list or use the available lookup tools to find the correct client.

Step 3: Open the Client Record

Select the correct client, then select **View Client**.

Step 4: Select Get Help

From the available client actions, select **Bed Request**. This opens the Resource Directory so you can locate a resource that offers beds.

Step 5: Choose a Resource

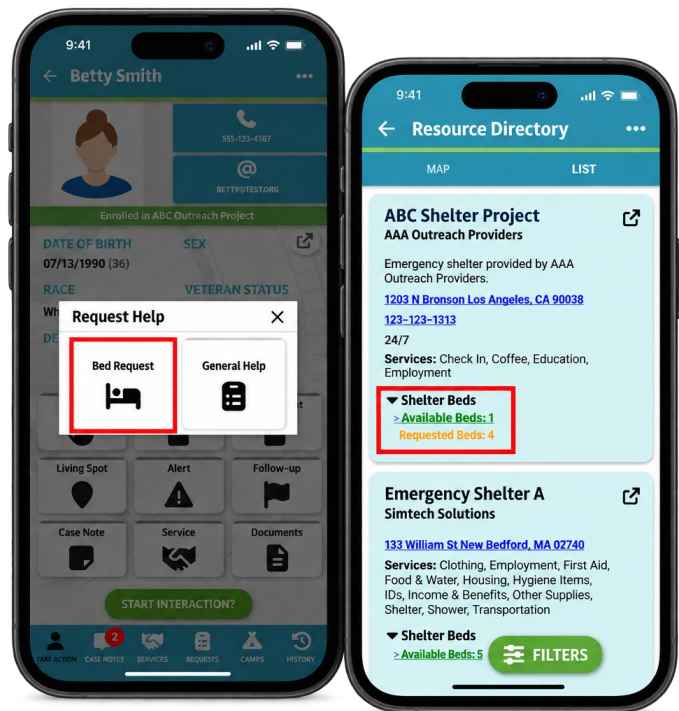
Review the organizations or projects available in the Resource Directory and select the appropriate resource for the client.

Step 6: Request an Available Bed

With the appropriate resource selected, choose Available Beds to request a bed for the client.

Step 7: Review the Request, If Needed

To confirm or edit details associated with the bed request, return to the client's record and open the **Requests** tab.



Using the Service Tracker

The Service Tracker provides a streamlined way to record services for one or multiple clients. It is especially useful when the same services are being provided to several people, such as during outreach, at a service center, or while working at an encampment.

Before You Begin: The Service Tracker can display up to 12 services at one time. Available services depend on how services have been configured for your project or resource.

Step 1: Open the Service Tracker

From the application, open the navigation menu and select **Service Tracker**.

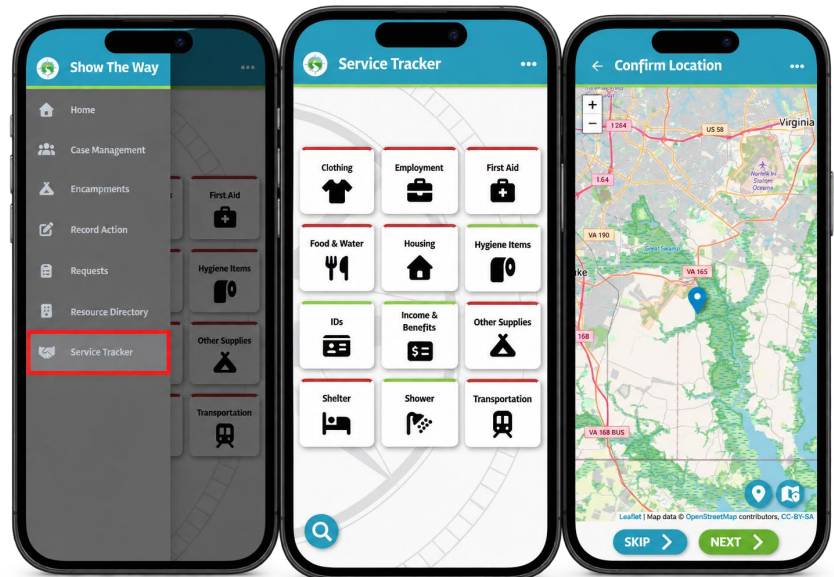
Step 2: Review the Available Services

The Service Tracker can display up to **12 services at a time**. For custom services, if your project has more than 12 available services, select the **Services** button to choose which services should appear on the Service Tracker screen.

Step 3: Select the Services to Display

Check or uncheck the applicable services, then select **Confirm**.

Only the services you selected will appear on the Service Tracker screen.



Step 4: Select the Services Being Provided

Select each service you want to record for the client or clients. Services display a **red stripe** by default; when selected, the stripe changes to **green**, indicating that the service will be applied.

Step 5: Search for the Client

Select the **Search** icon in the lower-left corner and locate the client who received the selected services. If the client is not already in Show The Way, the workflow also provides an option to create a new client.

Step 6: Select the Client

Select the appropriate client from the search results, then select **View Client**.

Step 7: Complete the Location Step

Continue through the location screen presented as part of the workflow.

Step 8: Confirm the Services Were Applied

After completing the location step, return to the Service Tracker and look for the **Success** message at the bottom of the screen. This confirms that the selected services were applied to the client.

Step 9: Repeat for Additional Clients

If the same services were provided to other clients, repeat the client search and selection process for each person. You do not need to reselect the services for each client as long as you continue to apply the same selected service.

Thank you for using Show The Way!

