CMIS CHECK IN PROCESS

Use this checklist when using ShelterPoint

- [ ] **STEP 1. DATE IN**
  For ES/TH - is the identified date when client moved in?
  For PSH - is the identified date when client had their intake?

- [ ] **STEP 2. UNIT NAME/NUMBER**
  Is the selected room/bed number where client is staying?

- [ ] **STEP 3. HOUSEHOLD MEMBERS**
  If not an individual client, were other members selected?

- [ ] **STEP 4. RELEASE OF INFORMATION**
  Did client sign an ROI during intake? If not an individual client, were other members selected? Choose parent provider.

- [ ] **STEP 5. PROVIDER & TYPE**
  Was a specific project and HUD (unless advised otherwise) selected?

- [ ] **STEP 6. UNIVERSAL DATA ELEMENTS**
  Does client have answers for their birthdate, race, ethnicity, gender, relationship to HoH, client location, and county?

- [ ] **STEP 7. PRIOR LIVING SITUATION**
  Where did client sleep prior to intake and for how long? When did they last lose their housing? How many times and total months have they been experiencing homelessness?

- [ ] **STEP 8. INCOME**
  Is client receiving any income? If yes, what source and amount? Check if old data matches current answers. If not anymore, add an End Date for old entries.

- [ ] **STEP 9. NON-CASH BENEFITS**
  Is client receiving any non-cash benefits? If yes, what source and amount? Check if old data matches current answers. If not anymore, add an End Date for old entries.

- [ ] **STEP 10. HEALTH INSURANCE**
  Does client have any insurance? If yes, what kind? Check if old data matches current answers. If not anymore, add an End Date for old entries.

- [ ] **STEP 11. DISABILITIES**
  Is client living with any disabling conditions? If yes, what kind? Check if old data matches current answers. If not anymore, add an End Date for old entries.

HOUSING ALLIANCE DELAWARE

CMIS CHECK OUT PROCESS

Use this checklist when using ShelterPoint

☐ STEP 1. DATE OUT

Is the identified date when the client exited from your program?

☐ STEP 2. REASON FOR LEAVING

Why did the client exit from your program? Please select the most appropriate reason, and avoid using 'Other'.

☐ STEP 3. DESTINATION

Where did the client go to after leaving your program? If not specified, but client has shared a possible destination (e.g. friends/family), use that. Save "No Exit Interview Completed" as a last resort since it will be flagged as an error.

☐ STEP 4. HOUSEHOLD MEMBERS

If not an individual client, check off all other members exiting from the program with client.

☐ STEP 5. INCOME

Did client exit with the same source and amount of income?

If no, update answers on 1) Yes/No, 2) HUD Verification, and 3) Total Monthly Income

☐ STEP 6. NON-CASH BENEFITS

Did client exit with the same source and amount of non-cash benefits?

If no, update answers on 1) Yes/No and 2) HUD Verification.

☐ STEP 7. HEALTH INSURANCE

Did client exit with the same source of health insurance?

If no, update answers on 1) Yes/No and 2) HUD Verification.

☐ STEP 8. DISABILITIES

Did client exit with the same disabling conditions?

If no, update answers on 1) Yes/No and 2) HUD Verification. If necessary, add an End Date.

☐ STEP 9. HOUSING ASSESSMENT AT EXIT

Is client receiving any non-cash benefits? If yes, what source and amount? Check if old data matches current answers. If not anymore, add an End Date for old entries.