EMERGENCY SHELTER WORKFLOW

For Large and Congregate Shelter Programs

1. **INTAKE**
    a. Meet with client and complete all necessary intake paperwork.

CMIS DATA ENTRY

2. **BACK DATE MODE**
    a. Set Back Date Mode to date and time of client checking into the shelter program.
        i. CoC guidelines must be adhered to, where data for shelter stays must be entered within 3 days of client completing intake.
3. **CLIENTPOINT - SEARCH**
    a. Clients who have contacted CI will have a profile in CMIS. Those who have not contacted CI will need to have a profile created.
4. **CLIENT PROFILE**
    a. Enter/update clients' Universal Data Elements (UDEs).
5. **HOUSEHOLDS**
    a. Check that all household members being checked into shelter program are found in the same household. If not, add additional household members now.
6. **RELEASE OF INFORMATION (ROI)**
    a. Add Release of Information for all household members under the Parent Provider.
7. **ENTRY/EXIT – PROJECT ENTRY**
    a. Click "Add Entry/Exit"
    b. Select all household members that are being checked into shelter.
    c. Add an Entry/Exit under the specific shelter that the client is staying at.
    d. Review and update all questions on Entry Assessment to reflect clients' situation as of their date of intake.
8. **DURATION OF SHELTER STAY**
    a. Case Management tab – add clients' case manager
    b. Case Plans tab – upload files relating to client's case management
    c. Interims – record changes in a client's information throughout their shelter stay.
9. **PROJECT EXIT**
    a. Clients are to be exited from the project when they check out or do not stay at the shelter for a night.
    b. Select all household members exiting the project.
    c. Select the Reason for Leaving and Destination that best reflects the client's situation.
    d. Update the Exit Assessment with any information not collected at Entry or through an Interim.