

PERMANENT SUPPORTIVE HOUSING WORKFLOW

Single Site

1. REFERRAL

- a. Receive referral from Centralized Intake (CI) through CMIS and email.
- b. Contact client.
 - i. Explain provider's Permanent Supportive Housing (PSH) process.
 - ii. Request client information and documentation.
 - iii. Schedule clients' intake and move in.

2. INTAKE

- a. Complete all necessary intake paperwork.

CMIS DATA ENTRY

3. CLIENTPOINT/CLIENT PROFILE

- a. Clients referred by CI will have a profile in CMIS.
- b. Review/Update client's Universal Data Elements (UDEs).

4. SHELTERPOINT

- a. Select program as Provider and click "View All" on ShelterPoint Dashboard.
- b. Un-hold bed(s) clients will move into.
- c. Begin Check-In process by using the check-in button next to Head of Household () in Outstanding Referrals section.

5. PROJECT ENTRY

- a. Date In should reflect date and time of client's application being approved.
- b. Assign Unit.
- c. (for families) Select all household members moving into program.
- d. Add Release of Information for all household members under the Parent Provider.
- e. Review/Update the following under Entry Assessment
 - i. Provider and Project Type to match program's settings.
 - ii. All questions (living situation, income, non-cash benefits, insurance, disability) to reflect clients' situation as of their date of check-in.
 1. Housing Move-In Date (HMID) – if client moves into housing unit on date of application approval, enter date in Entry Assessment.

6. DURATION OF PROGRAM 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 program stay.
 - i. Housing Move-In Date – if client moves into housing unit after date of application approval, create an Interim to update HMID.
 - ii. Annual Assessment – Needs to be added annually through an interim for clients staying in program for 365 days or more.

7. PROJECT EXIT

- a. Use check-out button next to Head of Household () when client(s) move out of their PSH unit.

- b. Select all household members exiting the program.
- c. Answer "Reason for Leaving" and "Destination" that best reflects client's situation.
- d. Update Exit Assessment as needed.
- e. Hold the now-Open bed(s) until they are available for new Referral from CI.