JOINT TRANSITIONAL HOUSING/RRH WORKFLOW

1. **REFERRAL**
    a. Receive referral from Centralized Intake (CI) through CMIS and email.
    b. Contact client.
        i. Explain program policies and procedures.
        ii. Schedule clients' intake and move-in.

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

CMIS DATA ENTRY

3. **CLIENTPOINT/CLIENT SUMMARY**
    a. Clients referred by CI will have a profile in CMIS.
    b. Accept RRH Referral from "Outstanding Incoming Referrals" on the Client Summary tab.

4. **CLIENT PROFILE**
    a. Review/Update clients' Universal Data Elements (UDEs).
5. **HOUSEHOLDS**
    a. Check that all household members being enrolled into program are found in the same household. If not, add additional household members now.
6. **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 – Use the check-in button next to Head of Household () in Outstanding Referrals section.
7. **CHECK IN – TH PROJECT ENTRY**
    a. "Date In" should reflect date and time of client move-in.
    b. Assign Unit.
    c. (for families) Select *all* household members also moving in and Assign Unit.
    d. Add Release of Information (ROI) for all household members under the Parent Provider.
    e. Review/Update the following under Entry Assessment
        i. Provider and Project Type to match shelter settings.
        ii. All questions (living situation, income, non-cash benefits, insurance, disability) to reflect clients' situation as of their date of check-in.
8. **ENTRY/EXIT – RRH PROJECT ENTRY**
    a. Click "Add Entry/Exit".
    b. Select all household members that are being enrolled.
    c. Add an Entry/Exit under the specific RRH project ("Provider") that the client is being served by. The Project Start Date should match the client's TH Date In.

    d. Answer/Update all RRH-related questions, as other assessment questions were updated during TH entry.

9. **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 stay.
        i. Housing Move-In Date (HMID) – Through an interim, add HMID for all household members once they move into permanent housing.
            1. For a Joint TH/RRH program, the HMID will be when the client exits the TH program.
        ii. Annual Assessment – Needs to be added annually through an interim for clients staying in program for 365 days or more.
    d. Clients can be enrolled under multiple RRH Providers if they are receiving funding from them.
        i. If one RRH program is CoC-funded, the Entry and Exit Dates will have to encompass the entire time range that the client was served.
10. **SERVICE TRANSACTIONS** (for DSHA-funded RRH programs)
    a. Add Services for each time financial assistance is provided to client.
        i. Log funding source used and amount of money provided under "Apply Funds to Service" section of Services page.
11. **PROJECT EXIT**
    a. Clients are to be exited from the RRH project when they stop receiving RRH assistance.
        i. If the client exits the program without being housed, the TH Exit Date will match the RRH Exit Date.
    b. **TH – SHELTERPOINT CHECK OUT**
        i. Use check-out button next to Head of Household ( ) when exiting client(s) from TH program.
        ii. Select all household members exiting the project.
        iii. Select the "Reason for Leaving" and "Destination" that best reflects the client's situation.
        iv. Update the Exit Assessment with any information not collected at Entry or through an Interim.
    c. **RRH – CLIENTPOINT EXIT**
        i. Select all household members exiting the project.
        ii. Select the Reason for Leaving and Destination that best reflects why the client is exiting the program and where they are exiting to.
        iii. All Exit Assessment information will be transferred from TH Exit Assessment.