HOUSING ALLIANCE DELAWARE

SERVICE ONLY WORKFLOW

Includes Diversion, Homelessness Prevention, and Housing Locator Programs

1. **REFERRAL**
   a. If applicable, receive referral from Centralized Intake (CI) through CMIS and email.
   b. Contact client.
      i. Explain provider's Service program and process.
      ii. Request client information.
      iii. Schedule clients' intake.

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

CMIS DATA ENTRY

3. **BACK DATE MODE**
   a. Set Back Date Mode to date and time of intake meeting with client.
4. **CLIENTPOINT/CLIENT SUMMARY**
   a. Clients referred by CI will have a profile in CMIS.
   b. If referred by CI, accept Referral from "Outstanding Incoming Referrals" on the Client Summary tab.
5. **CLIENT PROFILE**
   a. Review/Update clients' Universal Data Elements (UDEs).
6. **HOUSEHOLDS**
   a. Check that all household members being enrolled into program are found in the same household. If not, add additional household members now.
7. **RELEASE OF INFORMATION (ROI)**
   a. Add Release of Information for all household members under the Parent Provider.
8. **ENTRY/EXIT – PROJECT ENTRY**
   a. Click "Add Entry/Exit".
   b. Select all household members that are being enrolled in the program.
   c. Add an Entry/Exit under the specific project ("Provider") that the client is being served by.
   d. Review and update all questions on Entry Assessment to reflect clients' situation as of their date of intake.
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 program stay.
10. **SERVICE TRANSACTIONS** (for DSHA-funded 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 Service Only project when they stop receiving assistance.
    i. For Service-Only projects where clients can potentially receive continuous assistance, clients will be exited after a pre-determined amount of time of no contact with the client.
b. Select all household members exiting the project.
c. Select the Reason for Leaving and Destination that best reflects why the client is exiting the program and where they are exiting to.
d. Update the Exit Assessment with any information not collected at Entry or through an Interim.
    i. Homelessness Prevention and Diversion programs are required to answer Housing Assessment questions at the bottom of the Exit Assessment.