

TRANSITIONAL HOUSING WORKFLOW

1. REFERRAL

- a. If applicable, receive referral from Centralized Intake (CI) through CMIS and email.
- b. Client will contact agency shortly after referral is received.
 - i. Explain program policies and procedures.
 - ii. 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
 - i. With CI Referral – Under the Outstanding Referrals section, use the check-in button next to Head of Household (👤➕).
 - ii. Without CI Referral – Click the check-in button (👤➕) next to bed assigned to Head of Household.

5. CHECK IN

- 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.

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 stay.
 - i. Annual Assessment – required Interim for clients staying in program for 365 days or more.

7. CHECK OUT

- a. Use check-out button next to Head of Household (👤➖) when exiting client(s).
- b. Select all household members exiting the program.
- c. Select the "Reason for Leaving" and "Destination" that best reflects the 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, if applicable.