HOUSING
ALLIANCE
DELAWARE

EMERGENCY SHELTER WORKFLOW

1. **REFERRAL**
    a. Receive referral from Centralized Intake (CI) through CMIS and email.
    b. Client will contact shelter shortly after referral is received.
        i. Explain shelter 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 shelter's Provider project 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 when the client moved 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 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.
7. **CHECK OUT**
    a. Use check-out button next to Head of Household ( ) when exiting client(s).
    b. Select all household members exiting the shelter.
    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.