Quick Guide: CMHA Workflow 1

Complete Shelter Enrollment	Unit Assignment	Unit Transfers

Complete Shelter Enrollment

1. Click on the *Programs Tab*. Scroll down to the *Programs: Available* section.
2. Select the program you would like to enroll the client(s) into.
3. Click *Enroll* and complete the program enrollment screen.

*Please note: Enable the *Include Group Members* toggle to include family members in the enrollment.

Unit Assignment

1. After the client is enrolled, click *Add Unit* from the *Units Tab* under the program enrollment.
2. Enter Unit Start Date.
3. Click on *Available Units*.
4. Select the unit you would like to assign the client to.

5. Click Save and Close.

*Ensure client contact information is up-to-date

Unit Transfers

Clients may need to move to another unit due to reasonable accommodations, unit repairs, etc. Follow these steps to transfer a client to another unit.

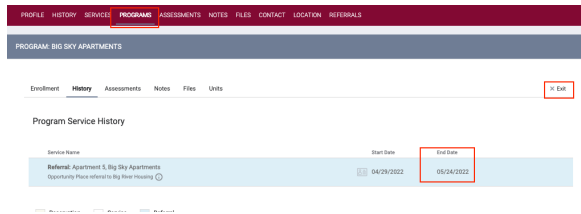1. Go to the *Units Tab*.
2. Click edit next to the current unit.

3. Add an End Date to the Current Unit.
4. Assign the Client to a New Unit.

Exits

Exist are completed when a client is no longer receiving services.

1. Click on *Programs tab*
2. Click on *Exit*
3. Complete Exit Information
   - Exit Destination
   - Complete Exit for all household members

4. Save and Close

*The client will also be exited from the unit when the enrollment exit is completed.