Quick Guide: CMHA Workflow 2

Coordinated Entry Enrollment	Crisis Assessment & Queue Referral	Unit Queue

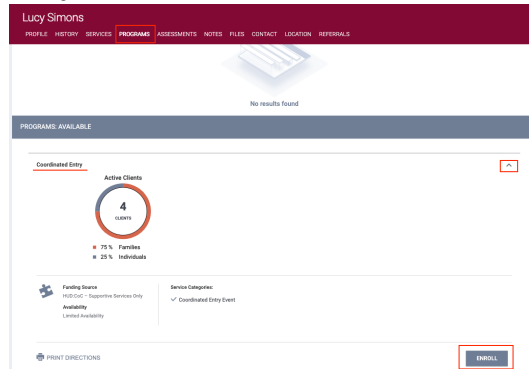## Coordinated Entry Enrollment

1. Complete when the shelter is at full capacity
2. Go to client file
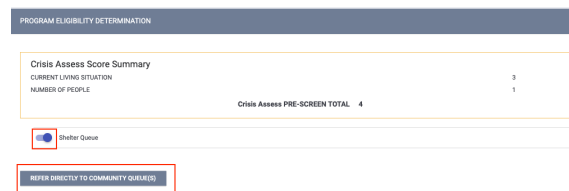3. Click *Programs*
4. Click drop down next to *Coordinated Entry*

5. Click *Enroll* and complete the program enrollment screen.
6. Save and Close

Crisis Assessment & Queue Referral

1. After completion of CE Enrollment, you will be directed to the *Assessment Tab*.
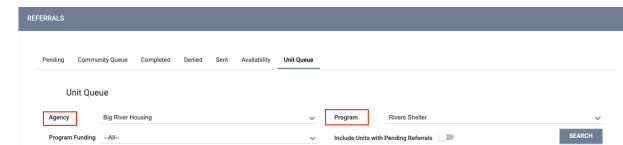2. Complete the Crisis Assessment
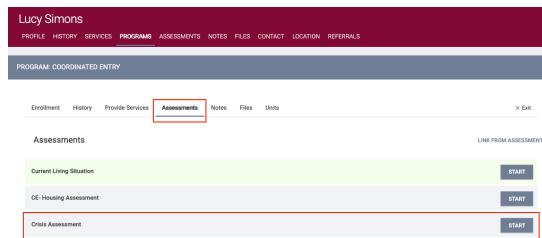
3. Save
4. Toggle on *Shelter Queue*
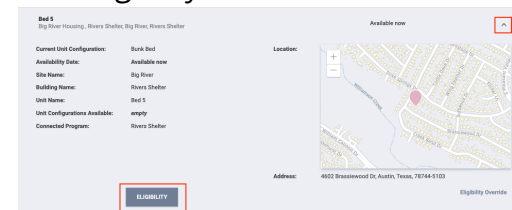5. Click *Refer Directly to Community Queues*

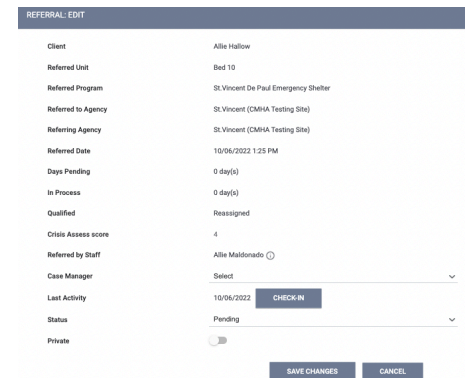6. Click *Send Referral*

Unit Queue

1. When shelter is at capacity, refer a client to your program under the Unit Queue
2. Filter the queue by agency and/or program

3. Identify the available room/bed
4. Click *Eligibility*

5. Click Refer

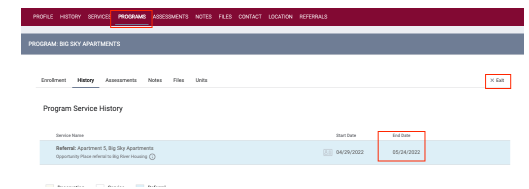| Processing Referrals	Unit Transfers	Exits

Enrolling the client correctly will complete the referral and enroll the client into the program simultaneously.
 	
1. Go to *Referrals & click Pending or go directly to the Program Tab in the client record.*
2. Accept the referral and complete the enrollment
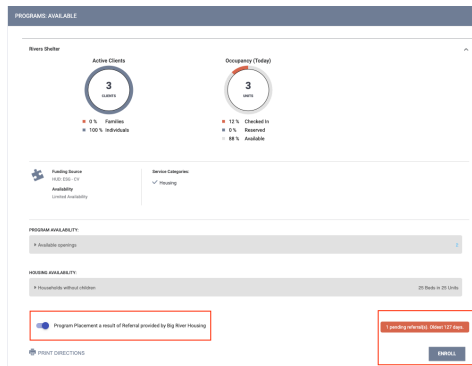 	
*The referral is a result of the "Program placement a result of Referral provided by" toggle being enabled.
 	
1. The client is automatically assigned to the referred room/bed.
2. Save Changes
	Clients may need to move to another unit due to reasonable accommodations, unit repairs, etc. Follow these steps to transfer a client to another unit.
	
	1. Go to the *Units Tab.*
	2. Click edit next to the current unit.
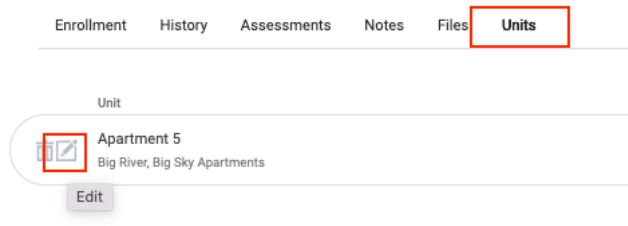	
	3. Add an End Date to the Current Unit.
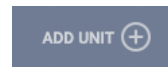	
	4. Assign the Client to a New Unit.
	
		Exit are made when a client is no longer receiving services.
		
		1. Click on *Programs tab*
		2. Click on *Exit*
		3. Complete Exit Information
		   o Exit Destination
		   o Complete Exit for all household members
		
		4. Save and Close