

MSHDA Shelter Diversion Basic Workflow

!!!IMPORTANT PREREQUISITE NOTICE!!

This workflow requires that users have a *FIRM* understanding of the ClientPoint Module as well as basic ServicePoint functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above **MUST** complete the appropriate prerequisite training before continuing. Please see www.hmislearningcenter.org for more information.

MSHMIS Shelter Diversion Project (MSHDA) Assessment – Complete on Shelter Diversion Project Page

*REMEMBER **BACK DATE** AND **ENTER DATA AS MODE** (IF NECESSARY)

1. **Search** for client in **ClientPoint** (Create **Household** if not already done)
2. Add **ROI**

Program Entry

3. Add a **HUD** type **Program Entry** (spread to all HH members).
 - **Entry Date** = Intake date
 - **Complete assessment questions on entry** for **ALL** HH members up to the section labeled “Answer for Head of Household Only”.
 - **Return to HoH Record** before proceeding.
4. Add **Service Transactions** (spread to all HH members) –See ‘[Service Transaction Addendum](#)’ for more information.
 - **Start Date** = Start of Service. **End Date** = Same as Start Date.
 - **Status of Need, Outcome of Need & If Need is Not Met, Reason** = Responses will vary

Services may include:

- Food
- Housing Expense Assistance
- Rent Payment Assistance
- Relocation Assistance
- Relocation Services
- Moving Services
- Household Goods Storage
- Material Goods
- Transportation
- Utility Assistance
- Mediation
- Landlord/Tenant Assistance
- General Legal Aid
- Child Care Expense Assistance
- Temporary Financial Assistance
- Information and Referral
- Education
- Income Support and Employment

Service Costs

NOTE: You must cost out services where dollars are appropriated. You will use the MSHDA Shelter Diversion funding source.

5. Choose the Service Transaction Tab

- Click **Multiple Services**
- Do not include additional family members
- Choose correct **Service Provider, Start Date and Service Type**
- Click the down arrow next to **Apply Funds for Service**
- Click **Add Funding Source**
- Search for **MSHDA Shelter Diversion**
- Click the **Plus Sign Next to MSHDA Shelter Diversion**
- **Add funds**
- **Closed and Fully Met**
- **Save and Exit**

****Important** – Continue to **update services** while client is still in the program

Program Exit

1. Update **Service Transactions** (if applicable)
2. Add a **Program Exit** (spread to all HH members)
 - **Exit Date = Date client leaves project**
 - **Reason for Leaving and Destination** must be completed.