

# Add Client to Shelter Waitlist

The Housing Hotline makes coordinated entry shelter placements using a vulnerability-based waitlist pulled directly from HMIS. This new update allows any ServicePoint user to add their literally homeless clients to the waitlist for shelter access. This **does not** require that the client has an open program entry.

Ensure your client has a valid and current ROI for your program by checking that there is a date on the Release of Information line at the top of the page. If you do not have an active ROI, please know that verbal ROIs from the clients **are** acceptable for entering shelter waitlist information. Please enter a length of one month for any verbal ROIs (i.e. an ROI starting 3/18/20 would end 4/18/20).

The screenshot shows the top section of a client record for "Client - (26860) Bowman, Test". It includes a green lock icon in the top right. Below the header, the client name "(26860) Bowman, Test" is displayed. The "Release of Information" field is set to "Ends 04/18/2020". To the right is a dropdown menu labeled "-Switch to Another Household Member-" and a "Submit" button. Below this are two tabs: "Client Information" (selected) and "Service Transactions".

Click on the Assessments tab (1). You should see a short list of questions that says Crisis Needs Assessment at the top (2). All questions on this list are used in to generate the shelter waitlist.

- If you see a list of questions that is NOT titled Crisis Needs Assessment, your provider hasn't been updated to allow shelter waitlist additions yet. Email Gwen for an immediate update.

Complete all questions on this list and hit Save at the bottom. If there are multiple people in the household, use the Switch to Another Household Member dropdown (3) to complete these questions for each member.

This screenshot shows the same client record with the "Assessments" tab selected, indicated by a blue box with the number "1". The "Assessments" tab is highlighted in the navigation bar. Below the navigation bar, there is a "Select an Assessment" section with a dropdown menu set to "-Select-" and a "Submit" button. Below this, the "Crisis Needs Assessment" section is visible, highlighted with a blue box and the number "2". At the top right of the main content area, the "-Switch to Another Household Member-" dropdown and "Submit" button are highlighted with a blue box and the number "3".

Click on the Service Transactions tab and click Add Need.

**Client - (26860) Bowman, Test**

(26860) Bowman, Test  
Release of Information: Ends 04/18/2020

-Switch to Another Household Member- Submit

**Client Information** | **Service Transactions**

**Service Transaction Dashboard**

- Add Need
- Add Service
- Add Multiple Services
- Add Referrals
- View Previous Service Transactions

Check the box for all household members that need shelter. Set the need to “Emergency Shelter” (a), the outcome to “Not Met” (b), and the reason not met to “All Services Full” (c).

**Add Need**

**Household Members**

To include Household members for this Need, click the box beside each name. Only members from the SAME Household may be selected.

- (15225) Male Single Parent
  - (26860) Bowman, Test
- (43545) Couple With No Children
  - (26860) Bowman, Test

**Need Information**

**Provider\*** Coordinated Assessment (2402) Search My Provider Clear

**Need\*** Emergency Shelter (BH-1800) Look Up **a**

**Date of Need\*** 03 / 18 / 2020 3 16 : 12 PM

Amount if Financial

Notes

**b** **Need Status\*** Identified

**Outcome of Need** Not Met

**If Need is Not Met, Reason** All Services Full **c**

Save & Continue Save & Exit Cancel

Click “Save & Exit” at the bottom. Your client will appear on the coordinated entry shelter waitlist the following day.

Please email [hmisrequest@councilforthehomeless](mailto:hmisrequest@councilforthehomeless) with any additional questions.