

Step-by-Step: Program Enrollment

1. Login to CSIS.
2. Search for Client - Review client profile to ensure all fields are correct.
 - a. If the client is new to the CoC or new to homelessness, you may need to create the client. You can follow the instructions on creating a client if you are unsure how to do this.
3. Verify the client has an active Universal ROI (UROI) is not active, the system will notify you with the image below.

 Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

MANAGE

- a. You can also manager the UROI in the client's privacy.



ADD RELEASE OF INFORMATION 

- b.


4. Review and add the client's **Contact Information**.

CONTACT

ADD CONTACT 

5. Review and add the client's **Location Information**.

LOCATION

ADD ADDRESS 

6. Verify/Update client's Household prior to providing services or program enrollment.

Household Members

Manage

7. Enroll client in Program, click on the "**PROGRAM**" text along the of screen.

Betty Smith

PROFILE

HISTORY

SERVICES

PROGRAMS

ASSESSMENTS

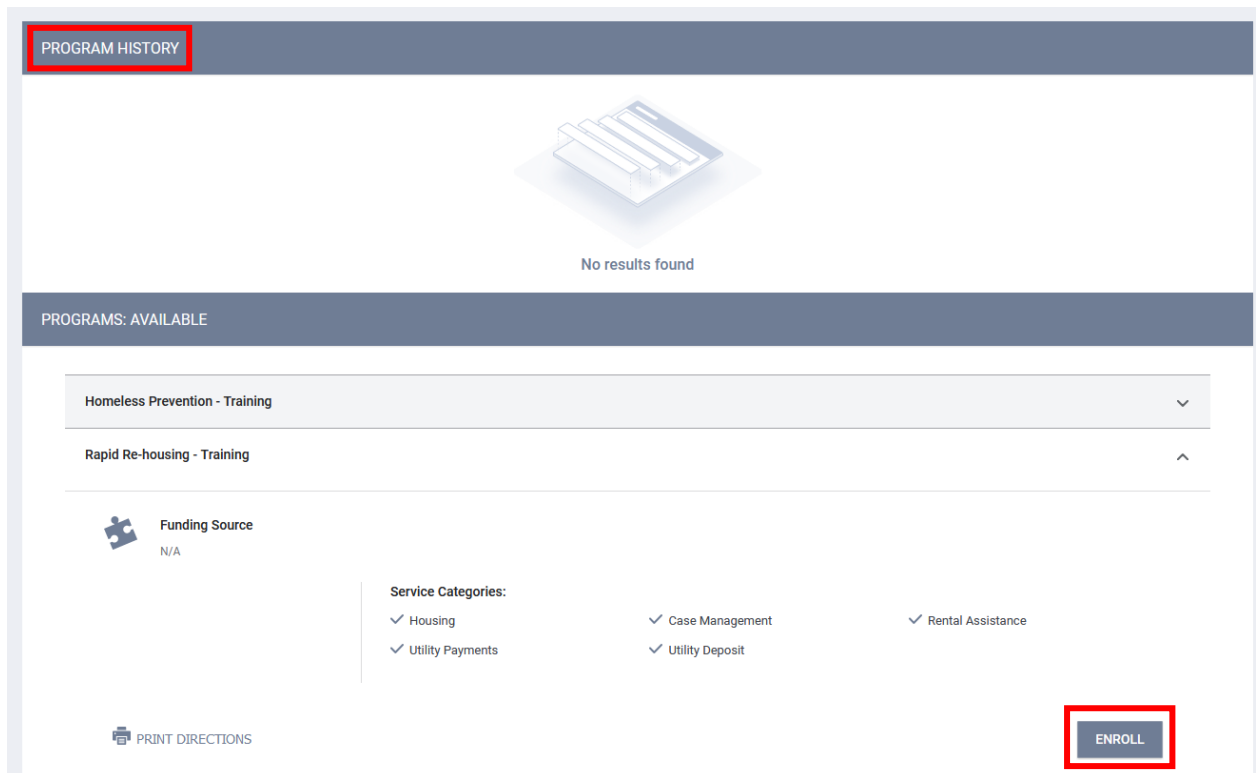
NOTES

FILES

CONTACT

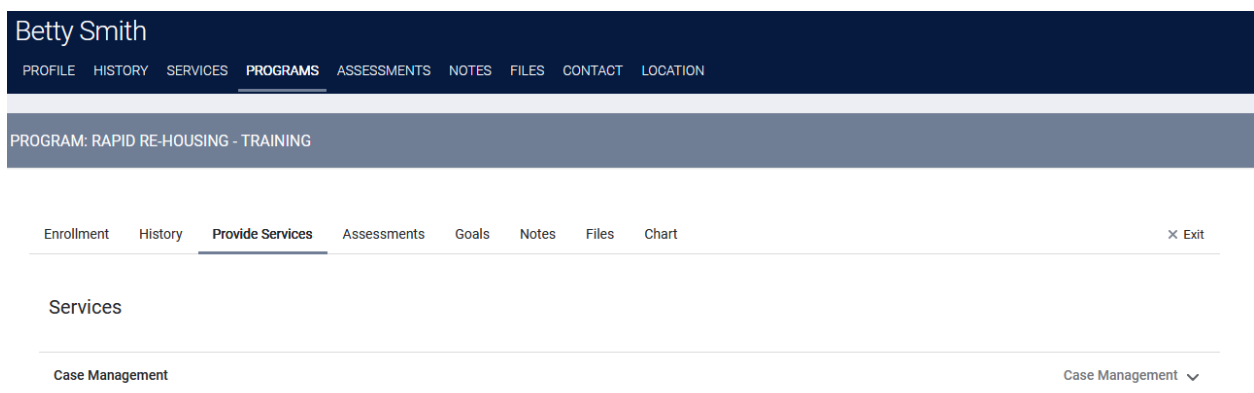
LOCATION

- Client's Program History screen will appear. Below this, is the Programs Available under your agency to enroll the client in. Select which program you wish to enroll client in by clicking the down arrow and clicking on the **ENROLL** icon.



- Complete the entire client enrollment screen. Review and update all data to ensure it is complete, current, consistent, and correct. **SAVE & CLOSE**
- Once you saved and close client's enrollment, the system will automatically take you to the Provide Services screen. You may not be ready to enter any financial services, but a case/care management service should be entered at this time.

Select which service category you wish to provide client with by clicking the down arrow.





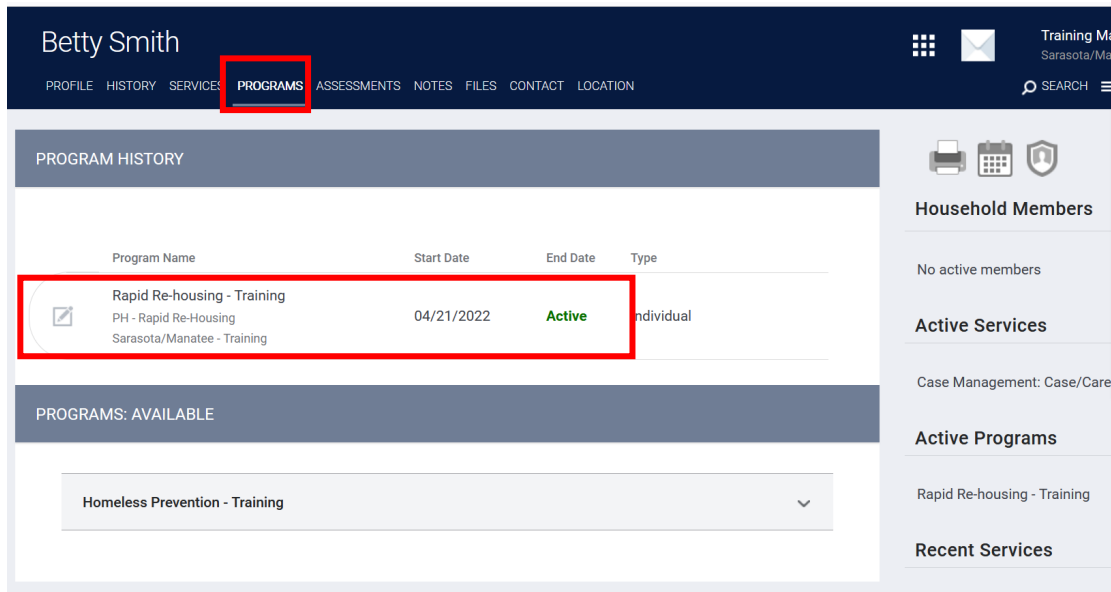
- This will open all available services under this category. To select the type of service you wish to provide by click on the down arrow to the left. Do not add case notes under service notes. Complete all service information on screen and **SUBMIT**.

- Select the **NOTES** tab under the program banner. This is the notes area that is associated with your program enrolled are enter. To add a note, click on the **ADD NOTE**.

- Create Title, select category from drop down and type note. Notes can be made private by clicking on the toggling at the bottom. Click on **ADD RECORD** to save.

Step-by-Step: Program Exit

1. To exit client from program, search for client from client search bar or use your Caseload screen. Once the client's profile has been brought up, select the **PROGRAM** text. Select the program you wish to exit client from under Program History. Hover your mouse over programs name and click on the box with the pencil to the left. This opens the program



Betty Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION

SEARCH

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Rapid Re-housing - Training PH - Rapid Re-Housing Sarasota/Manatee - Training	04/21/2022	Active	Individual

PROGRAMS: AVAILABLE

Homeless Prevention - Training

Household Members

No active members

Active Services

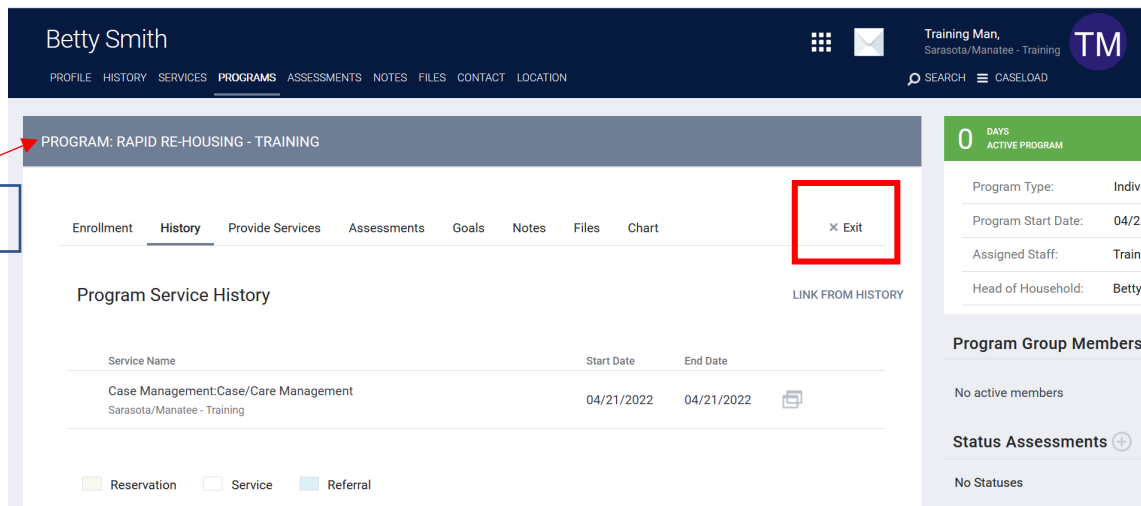
Case Management: Case/Care

Active Programs

Rapid Re-housing - Training

Recent Services

2. To exit client, select the **X EXIT** icon/text at the end to the row, under the program banner.



Betty Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION

SEARCH CASELOAD

PROGRAM: RAPID RE-HOUSING - TRAINING

Enrollment **History** Provide Services Assessments Goals Notes Files Chart

X Exit

Program Service History

LINK FROM HISTORY

Service Name	Start Date	End Date
Case Management:Case/Care Management Sarasota/Manatee - Training	04/21/2022	04/21/2022

Reservation Service Referral

0 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 04/21/2022

Assigned Staff: Training

Head of Household: Betty

Program Group Members

No active members












Status Assessments


No Statuses

Program Banner

3. The Program Exit screen will appear. Complete/update information that may have change during this client's enrollment. **SAVE & CLOSE**

End Program for client Betty Smith


Project Exit Date	04/21/2022 
Destination	Select 
DISABLING CONDITIONS AND BARRIERS	
Physical Disability	No 
Developmental Disability	No 
Chronic Health Condition	No 
HIV - AIDS	No 
Mental Health Disorder	No 
Substance Use Disorder	No 
MONTHLY INCOME AND SOURCES	
Income from Any Source	No 
NON-CASH BENEFITS	
Receiving Non-Cash Benefits	No 
HEALTH INSURANCE	
Covered by Health Insurance	No 

 If the client/household has been permanently housed, please update the Housing Move-In Date field on the enrollment screen with the date the client/household moved into the permanent unit.

SAVE & CLOSE

CANCEL

NOTE: MOVE-IN DATES should be entered into the client's enrollment screen. When client is housed. If you do not do this prior to client's exit a warn pop up will appear to remind you.

 If the client/household has been permanently housed, please update the Housing Move-In Date field on the enrollment screen with the date the client/household moved into the permanent unit.