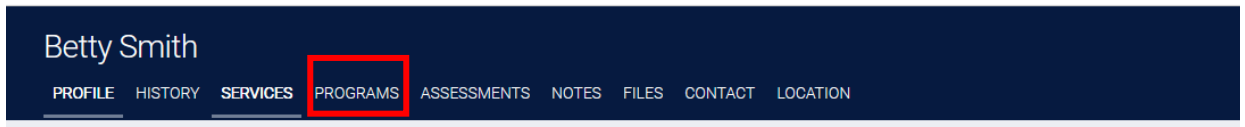


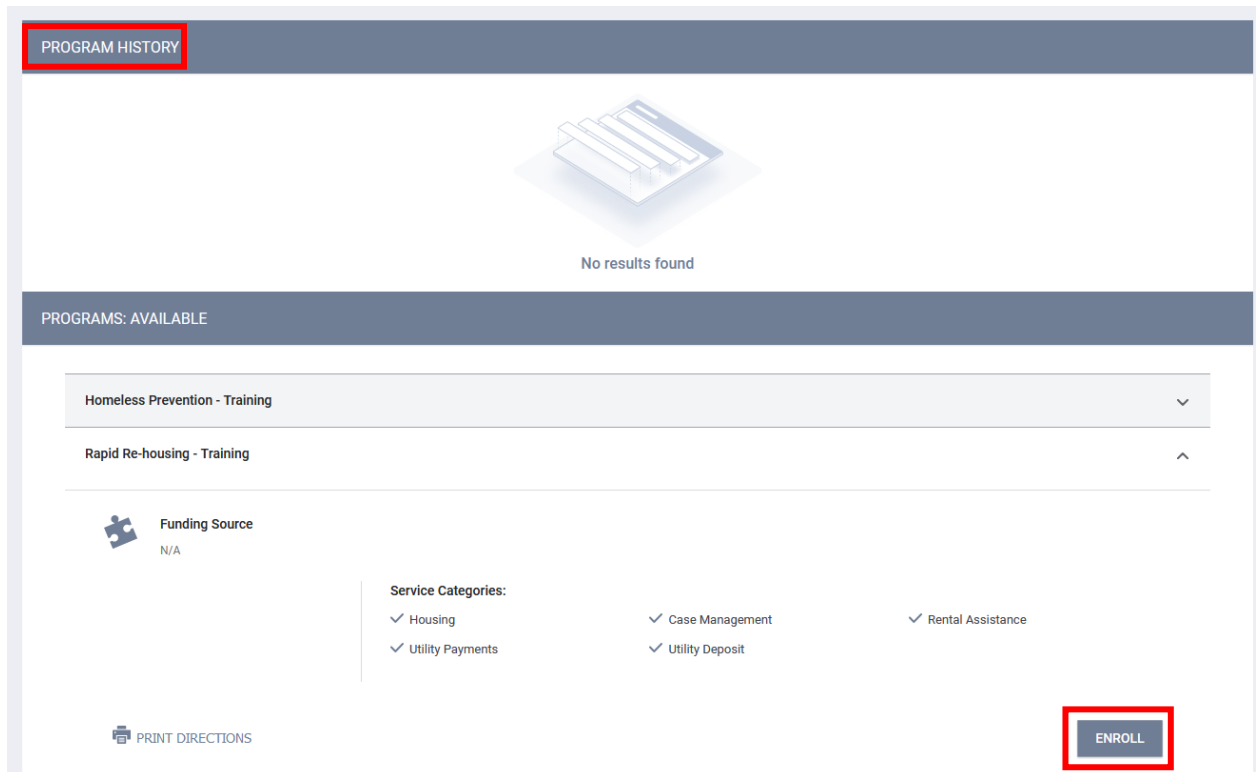


Step-by-Step: Entry/Exit

1. Login to CSIS.
2. Search for Client
 - 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. Ensure client has an active Universal Release of Information (UROI). Please review instructions on how to do this.
4. Enroll client in Program, click on the **"PROGRAM"** text along the of screen.



5. 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.



6. Complete the entire client enrollment screen. Review and update all data to ensure it is complete, current, consistent, and correct. **SAVE & CLOSE**
7. 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.

Betty Smith

[PROFILE](#) [HISTORY](#) [SERVICES](#) **[PROGRAMS](#)** [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#)

PROGRAM: RAPID RE-HOUSING - TRAINING

[Enrollment](#) [History](#) **[Provide Services](#)** [Assessments](#) [Goals](#) [Notes](#) [Files](#) [Chart](#)[X Exit](#)

Services

Case Management

Case Management ▼

Housing

Housing ▼

Rental Assistance

Rental Assistance ▼

Utility Deposit

Utility Deposit ▼

Utility Payments

Utility Payments ▼

8. 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**.

Services

Case Management


Case Management ▼

Case/Care Management ▼

Case Management

Case Management ▼

Case/Care Management


Event Date 04/21/2022 


Time Tracking: None ▼ 30 min ▼

Service Note :

B

I





SUBMIT



9. 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

This screenshot shows the user interface for Betty Smith's profile. At the top, a dark blue navigation bar contains the name "Betty Smith" and a series of tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The "NOTES" tab is circled in red with a yellow 'X' over it. Below this is a "Program Banner" for "PROGRAM: RAPID RE-HOUSING - TRAINING". A sub-menu includes Enrollment, History, Provide Services, Assessments, Goals, Notes, Files, and Chart. The "Notes" tab is highlighted with a red box. On the right side of the banner, there is an "Exit" button and an "ADD NOTE" button, both highlighted with red boxes. The main content area is titled "Client Program Notes" and displays a message "No results found" with an illustration of a stack of papers.

10. 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

This screenshot shows the "CLIENT NOTES" form. It has a header bar with "PROGRAM: RAPID RE-HOUSING - TRAINING" and a sub-menu with Enrollment, History, Provide Services, Assessments, Goals, Notes, Files, and Chart. The "Notes" tab is selected. The form contains several fields: "Title" (a text input field), "Category" (a dropdown menu with "Select" as the current option), "Date" (a date picker set to 04/21/2022), and "Note" (a large text area with a rich text editor toolbar). Below the "Note" field is a "Private" toggle switch. At the bottom of the form, there are two buttons: "ADD RECORD" and "CANCEL", both highlighted with red boxes.



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 Manager

Head of Household: Betty Smith

Program Group Members

No active members

Status Assessments

No Statuses

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

DISABLING CONDITIONS AND BARRIERS

Physical Disability Developmental Disability Chronic Health Condition HIV - AIDS Mental Health Disorder Substance Use Disorder


MONTHLY INCOME AND SOURCES

Income from Any Source


NON-CASH BENEFITS

Receiving Non-Cash Benefits

HEALTH INSURANCE

Covered by Health Insurance  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.