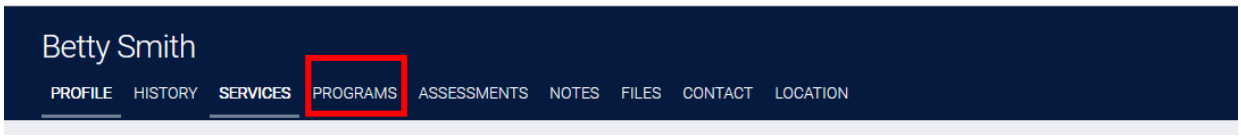
Step-by-Step: Entry/Exit

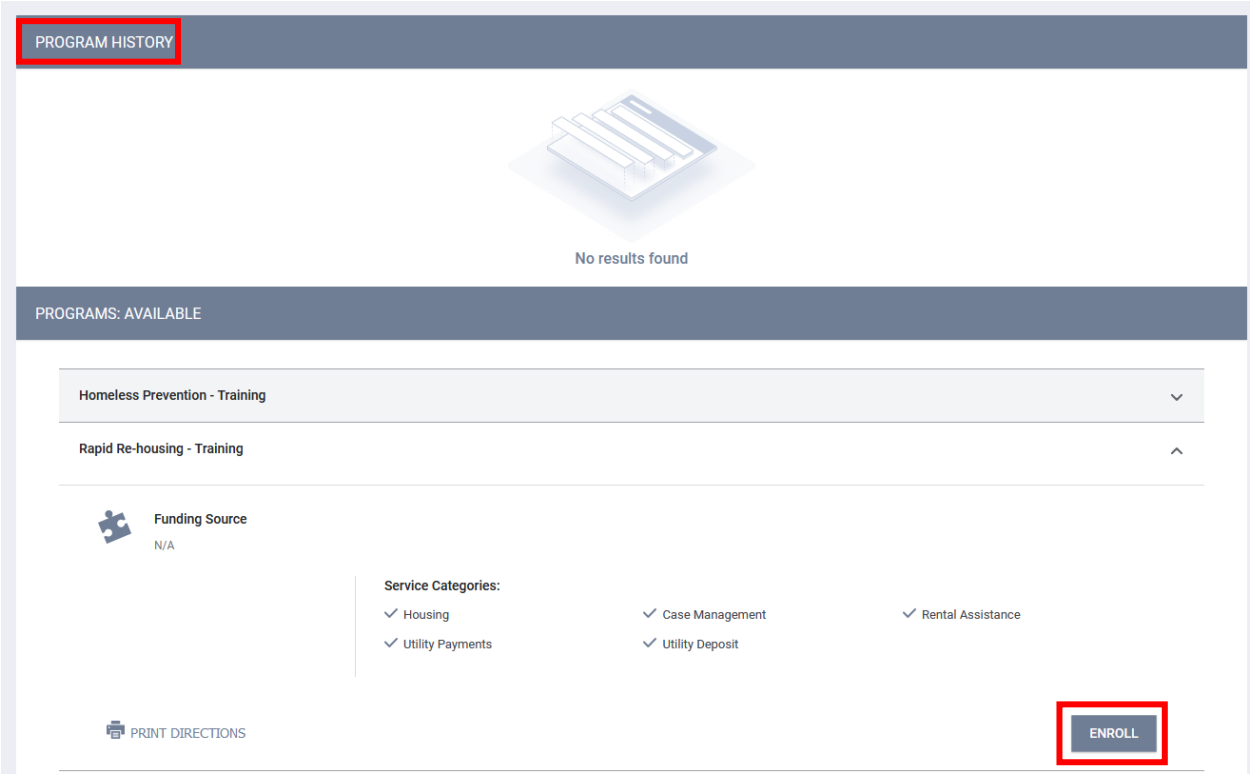
1. Login to CSIS.
2. Search for Client

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.

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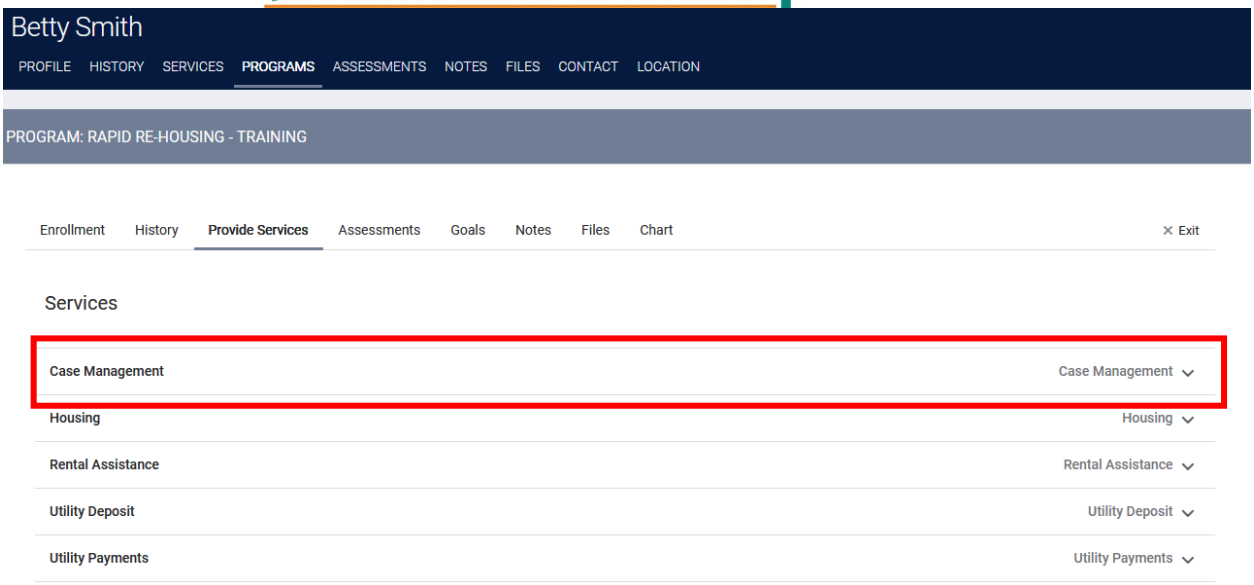
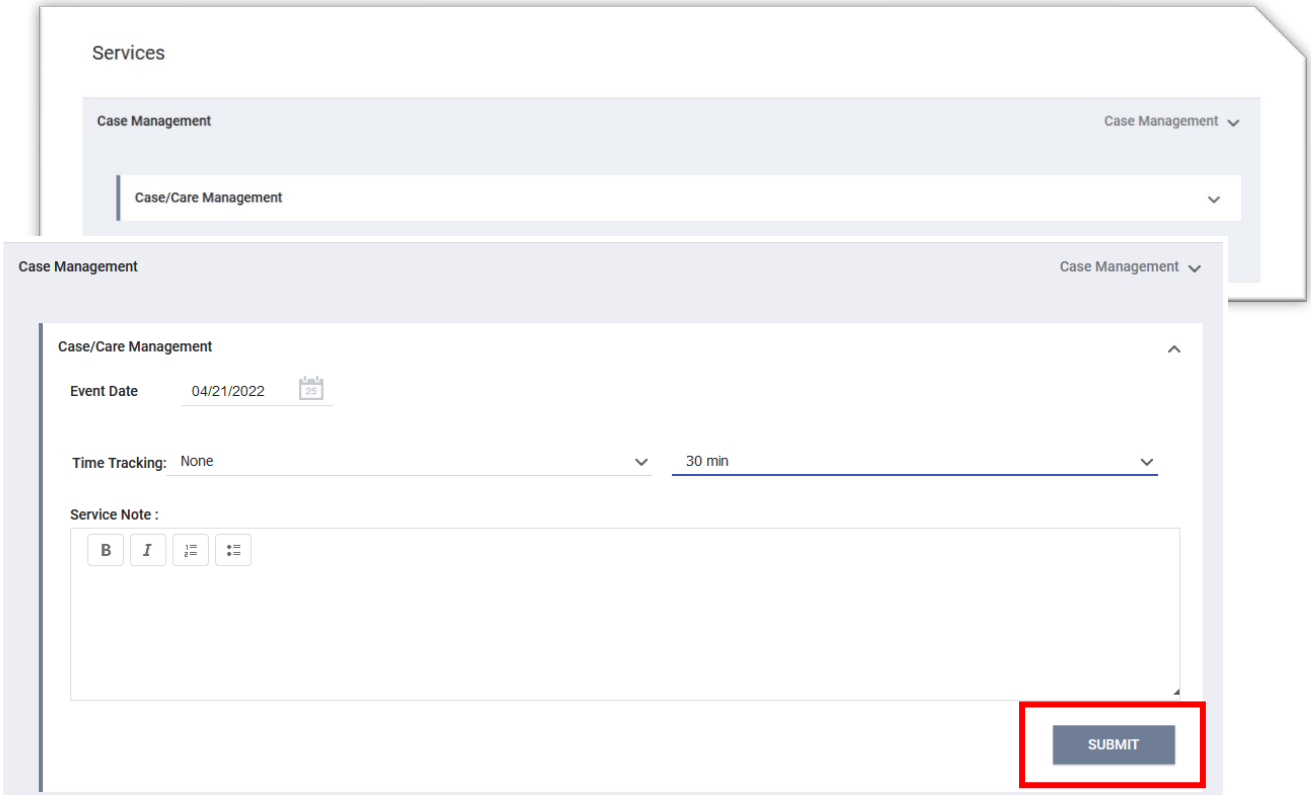
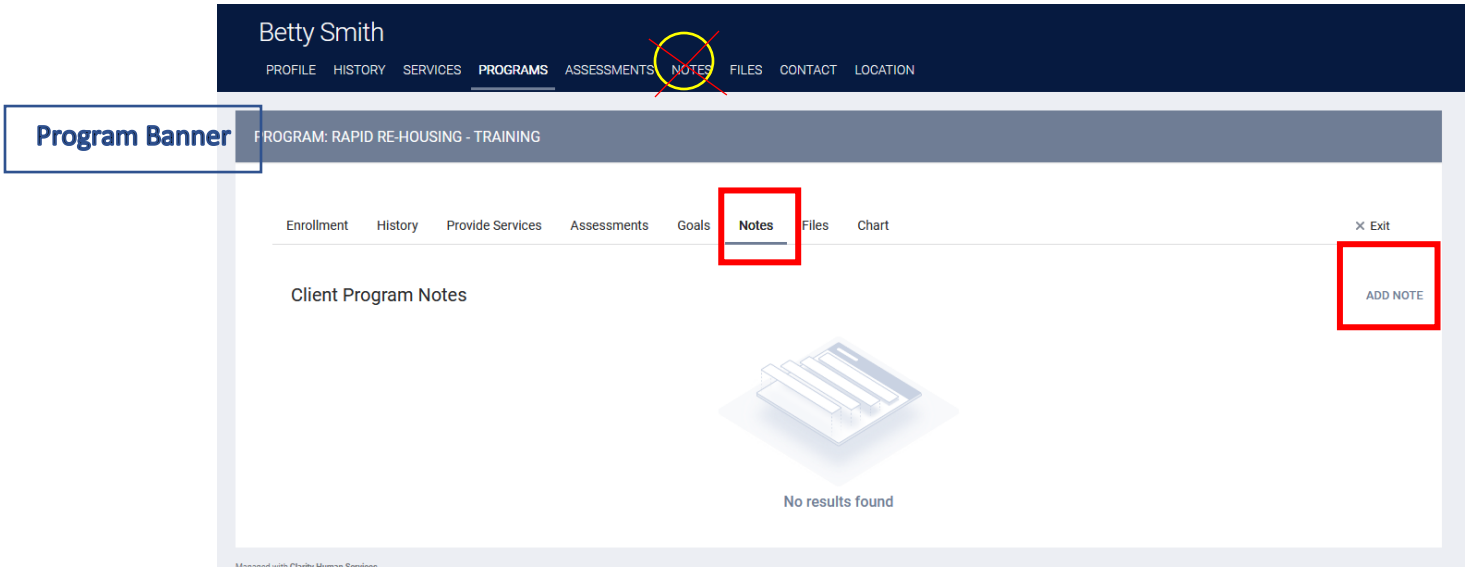


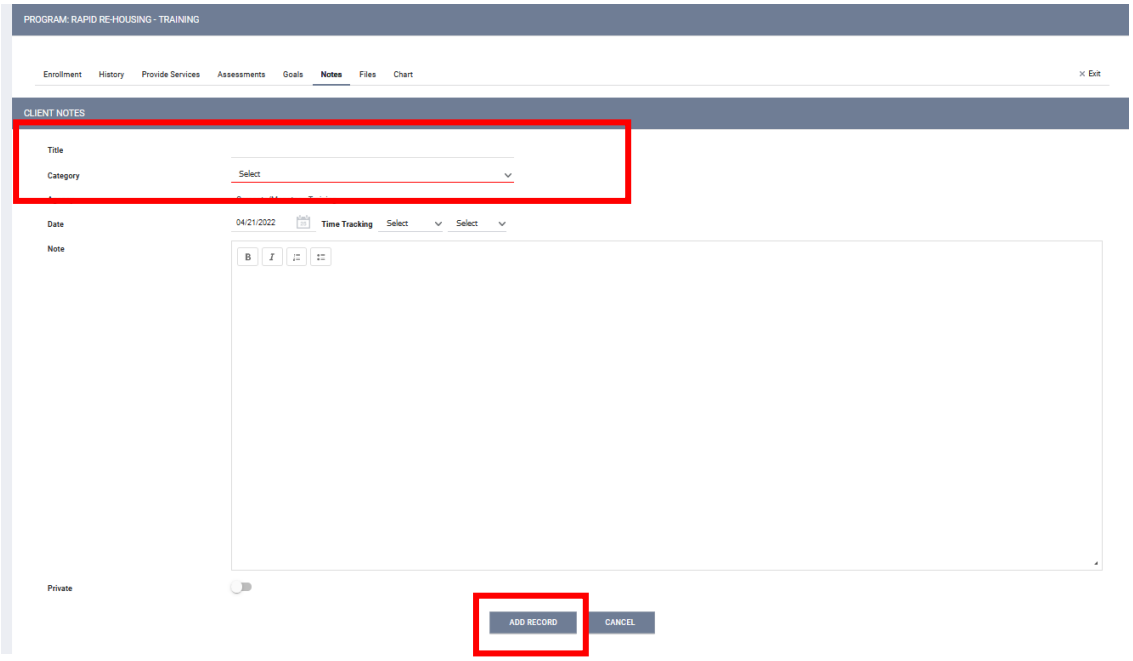
8. This will open all available services under this category. To select the type of service you wish to provide by click on the down arrow to the left. Do not add case notes under service notes. Complete all service information on screen and **SUBMIT.**



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

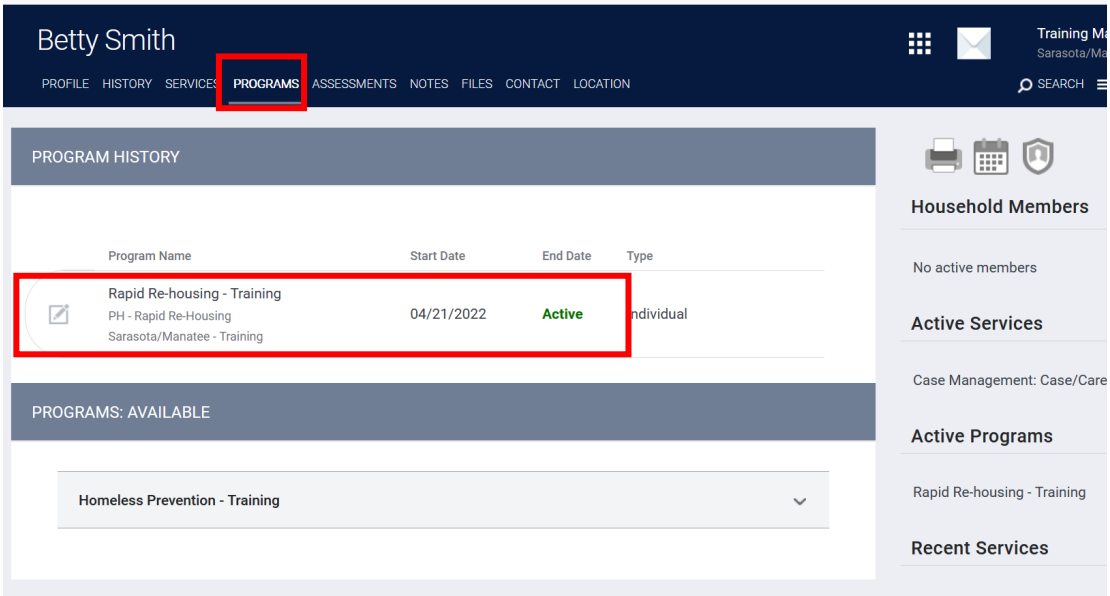


10. Create Title, select category from drop down and type note. Notes can be made private by clicking on the toggling at the bottom. Click on **ADD RECORD** to save

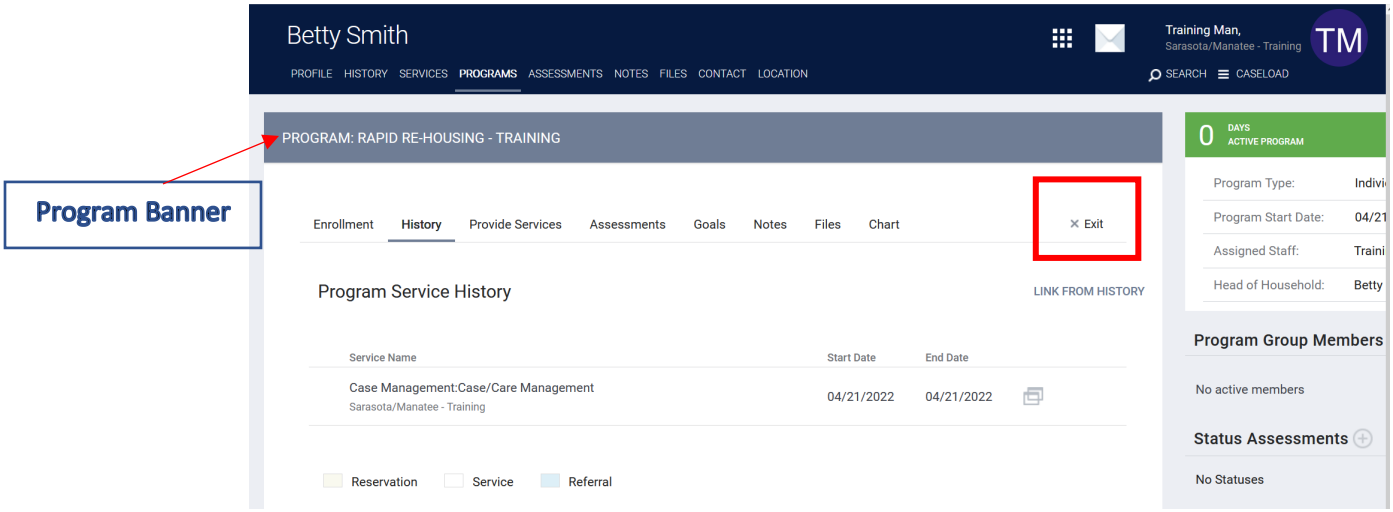


Step-by-Step: Program Exit

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



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



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

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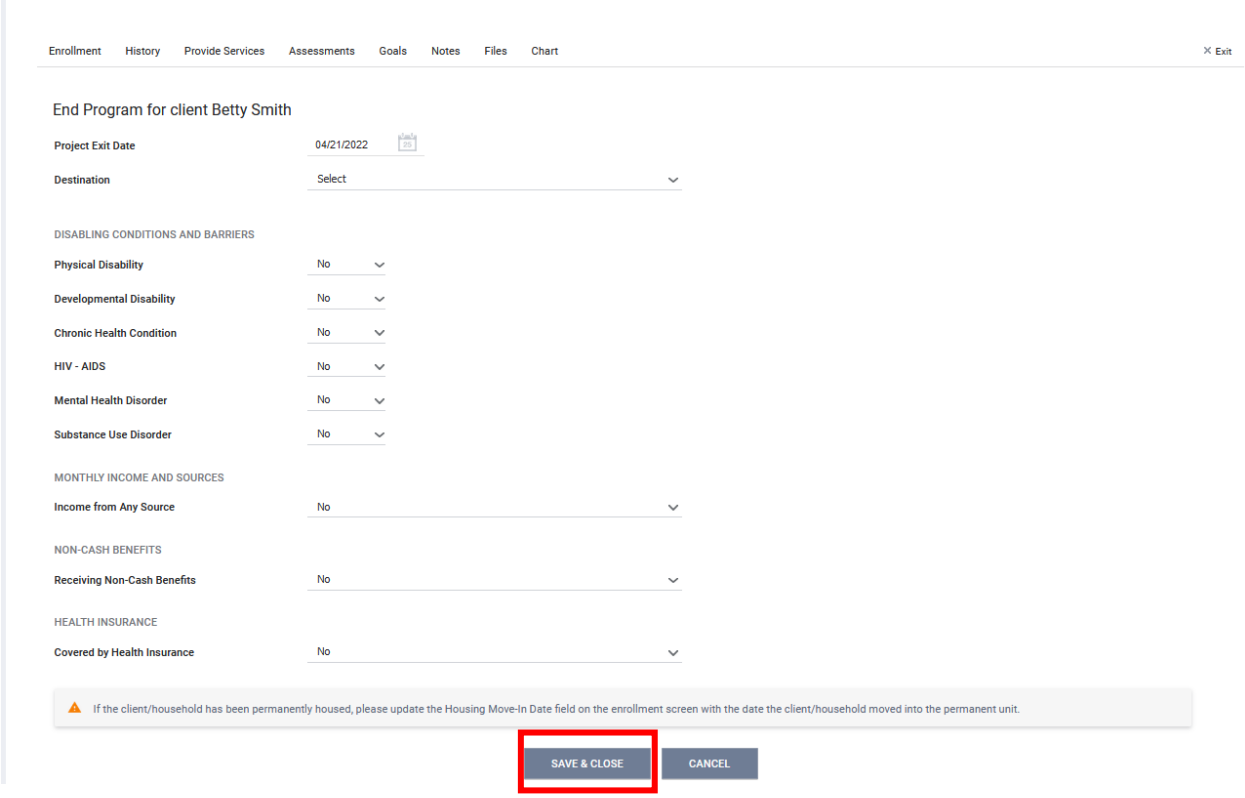

NOTE: MOVE-IN DATES should be entered into the client's enrollment screen. When client is housed. If you do not do this prior to client's exit a warn pop up will appear to remind you.