

Shelter intake and welcome

Use this staff checklist alongside your approved intake process. It is not an eligibility assessment, consent form, or medical screen.

Make a copy. Replace bracketed text and change the tasks for your shelter. Mark ☐ as ☒ when done.

Shelter: [Name] Staff: [Name] Date: [Date] Secure reference: [Reference]

Prepare for arrival

- ☐ Confirm the space and the staff member responsible for the welcome.
- ☐ Have current service information and communication support options available.

Welcome and explain

- ☐ Introduce yourself and explain the next step.
- ☐ Ask what would help the person take part in the conversation.
- ☐ Explain where to rest, get food, use bathrooms, and ask for help.

Check immediate support needs

- ☐ Ask about immediate practical support and follow the approved escalation process.
- ☐ Offer available communication or access support; record agreed follow-up in the approved system.

Orient and follow up

- ☐ Explain belongings, privacy, daily routines, and how to raise a concern.
- ☐ Provide the current resident welcome sheet and check understanding.
- ☐ Name the next contact person and agree on when to check in.

Agreed follow up

Action: [Agreed next step or none]

Owner: [Name] When: [Date and time]

Use local intake, consent, safeguarding, accessibility, and HMIS procedures. Replace service details with your facility's verified information.