

Shelter intake and welcome

Fictional completed example

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

Staff: Casey Date: September 8, 2026 Secure reference: TRAINING-001

Prepare for arrival

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

Welcome and explain

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

Check immediate support needs

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

Orient and follow up

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

Agreed follow up

Larger-print schedule provided. Jordan will check in after breakfast. Conversation notes remain in the approved system.

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