

Shelter software evaluation

Use the same fictional scenarios with each vendor. Record demonstrated behavior, open questions, and evidence before deciding whether the software fits your shelter.

Make a copy. Replace bracketed text and change the tasks for your shelter. Mark [] as [x] when done.

Shelter: [Shelter name] Vendor: [Vendor name] Review date: [Date]

Daily work

- [] Change a bed to out of service during intake and show the other staff view.
- [] Record an arrival and departure, then reconcile the nightly census.
- [] Hand off an unresolved task with an owner and due time.

Access and records

- [] Demonstrate staff permissions and removal of a departing staff member.
- [] Show a usable export and explain access, retention, and exit arrangements.
- [] Explain how the product fits existing HMIS entry and required reporting.

Implementation and support

- [] Describe migration work, staff training, and who does each step.
- [] Show written support hours, channels, and escalation arrangements.
- [] List recurring fees, setup, migration, taxes, and usage charges.

Evidence and follow up

Requirement or question	Evidence or remaining gap	Owner and date

Original comparison aid from ShelterCurrent, a shelter software provider. No vendor rankings or predetermined scores. Use the Excel worksheet for side-by-side evidence and costs.