

How to Use This Checklist

1. Share it with your team.

Send this checklist to program directors, case supervisors, outreach staff, and data managers.

2. Check off what applies.

Mark any item that reflects your current challenges or workarounds

3. Add notes.

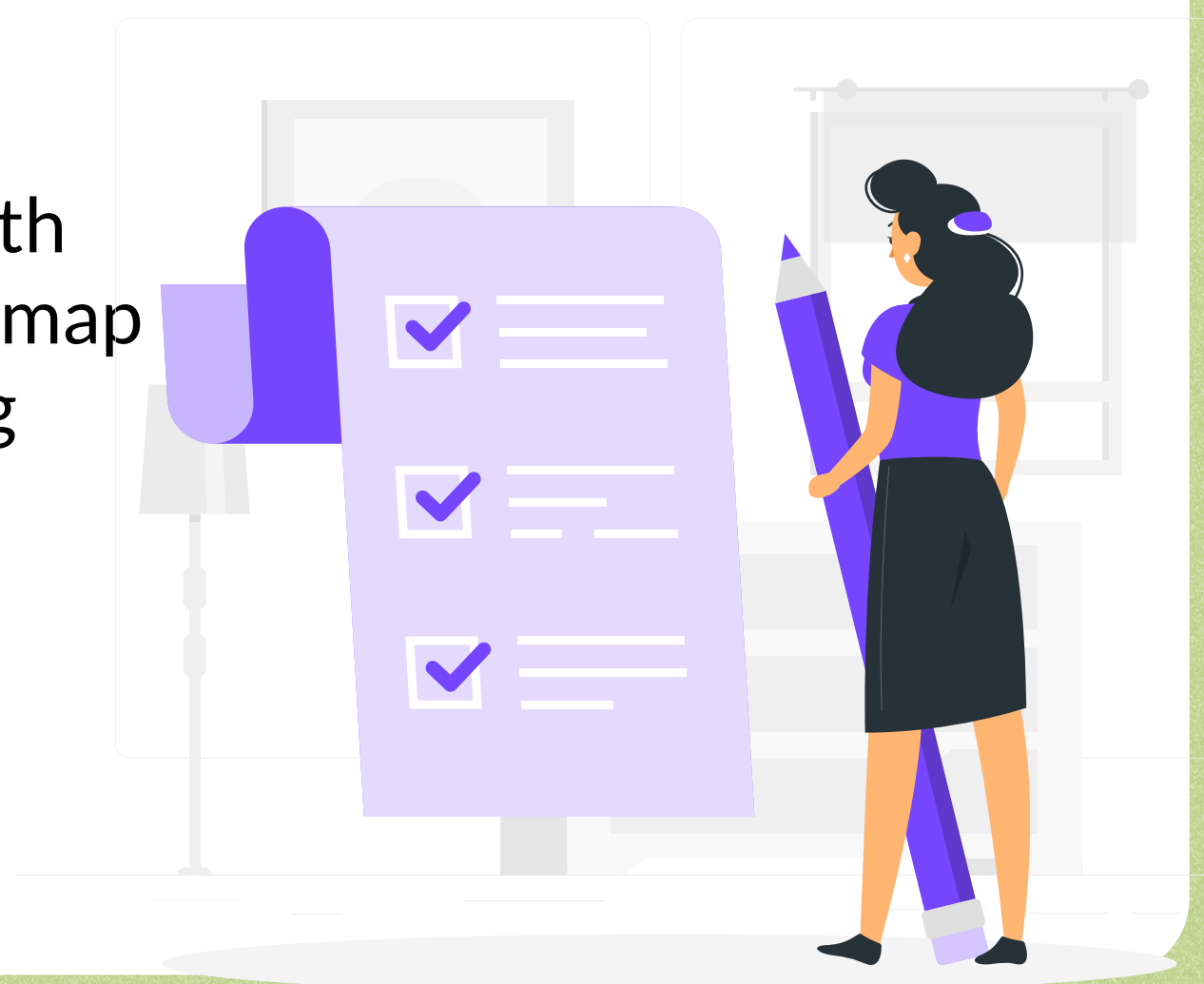
Jot down examples, tools you're using, or feedback from staff.

4. Review your results.

If you checked 3 or more boxes, integration could help. If you checked 5 or more, take action.

5. Bring it to CUBE84.

Schedule a free discovery session with CUBE84. We'll use your checklist to map gaps to Salesforce, without replacing HMIS or risking compliance.



Checklist: Extending HMIS with Salesforce

Check	Challenge or Gap Identified	Notes / Team Comments
<input type="checkbox"/>	Staff still use spreadsheets or email to track client progress or caseloads	
<input type="checkbox"/>	Referral statuses are hard to track or update in real time	
<input type="checkbox"/>	Outreach teams can't update records while in the field	
<input type="checkbox"/>	Intake forms or client workflows don't match program needs	
<input type="checkbox"/>	Case managers lose visibility when clients move between programs	
<input type="checkbox"/>	Housing placements get delayed due to poor tracking of landlord and unit details	

Check	Challenge or Gap Identified	Notes / Team Comments
<input type="checkbox"/>	Teams can't see up-to-date caseloads, housing timelines, or outcome metrics	
<input type="checkbox"/>	Client records are duplicated across departments or partner agencies	
<input type="checkbox"/>	No dashboards exist for visualizing time-to-housing, returns to homelessness, or outcomes	
<input type="checkbox"/>	Supervisors can't easily see if staff have completed follow-ups or updated case notes	
<input type="checkbox"/>	Providers can't securely share data without over-sharing or breaching privacy protocols	
<input type="checkbox"/>	Coordinated Entry lacks shared visibility into queues, placements, or prioritization logic	
<input type="checkbox"/>	Staff say the tools they have slow them down or limit service quality	

What to Do Next

- If you checked 3 or more boxes: Your team likely needs a support layer beyond HMIS.
- If you checked 5+ boxes: You may be dealing with major data coordination or client service bottlenecks.

Bring your completed checklist to a free discovery session with CUBE84. We'll review the gaps with you and map them to the right Salesforce features, without disrupting your current HMIS setup.

