
City of San Jose

RRH Workflow Training

— March 7, 2018 —

Steps in the Process

1. Managing Referrals
2. Program Enrollment
3. Status Assessment
4. SPDAT
5. Provide Services
6. Case Notes
7. Program Exit

1. Managing Referrals

Managing Referrals - Overview

- Check Referrals tab for Pending Referrals
- Change Referral Status to “Pending - In Process”
- Attempt to locate client - log outreach attempts in the Notes tab and create an Outreach Service
- If denying the referral, send the referral back to the Community Queue
- If accepting the referral, move on to Program Enrollment

Check for Referrals

- On Search screen, go to Referrals tab
- Pending tab shows referrals to your agency
- Click Edit icon to the right of the referral you want to view

The screenshot shows the user interface for checking referrals. At the top, the user is identified as Jenn Ong, SCC CM Agency (e.g. BWC, PATH). The navigation bar includes SEARCH, CASELOAD, and REFERRALS (highlighted with a red box). Below the navigation bar, the REFERRALS section is active, with the Pending tab selected (also highlighted with a red box). The interface shows filters for Search, Mode (Standard), Eligible Clients Only (disabled), and Sort By (Default). A SEARCH button is present. The main content area displays a table of referrals with columns for Client, Referral Date, Qualified, and Days Pending. A red arrow points to the first row, which is for Mrs Potts, Program: [RRH CSJ] CM Program, Referred By: CCP ICM Agency (e.g. PATH), with a Referral Date of 10/23/2017, Reassigned status, and 0 Days Pending.

Client	Referral Date	Qualified	Days Pending
Mrs Potts Program: [RRH CSJ] CM Program Referred By: CCP ICM Agency (e.g. PATH)	10/23/2017	Reassigned	0

Mark Referral as “In Process”

- On the referral, change Status to “Pending - In Process”
- Optional - assign a Case Manager
- Save changes

REFERRAL: EDIT

Client	Mrs Potts
Referred Program	[RRH CSJ] CM Program
Referred to Agency	SCC CM Agency (e.g. BWC, PATH)
Referring Agency	CCP ICM Agency (e.g. PATH)
Referred Date	10/23/2017 9:01 PM
Days Pending	0 day(s)
Qualified	Reassigned
Referred by Staff	Jenn Ong
Case Manager	Select ▾
Last Activity	10/23/2017 CHECK-IN
Status	✓ Pending Pending - In Process Denied Expired
Private	

SAVE CHANGES

CANCEL

Attempts to Contact Clients

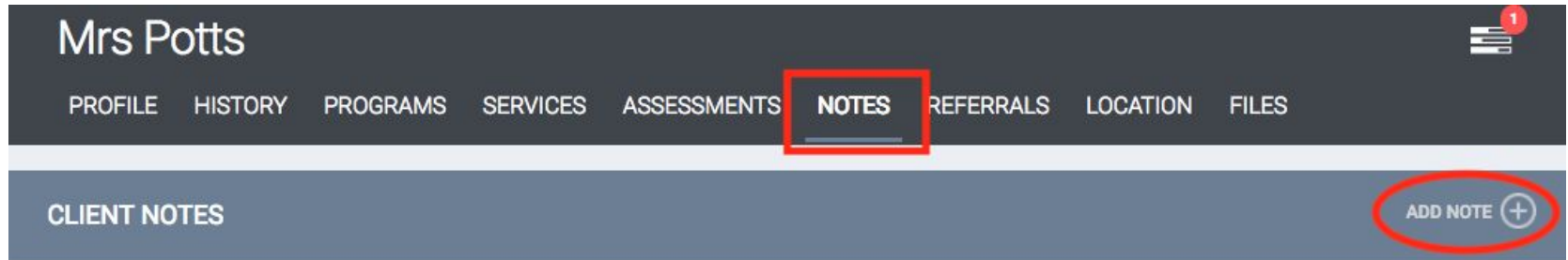
- Finding the client - Clarity can help
 - “Where is it easiest to find you...” questions in VI-SPDAT
 - Location tab
 - Client’s History tab (program/service history)
 - Assigned staff at latest program enrollment
 - Public alerts
- **Document your attempts to contact client in the Notes tab and Services tab**

Entering Attempts to Locate a Client into HMIS

1. Enter a Case Note for the client
2. Create an Outreach Service (for reporting and data tracking, more visible to other agencies)

Document Attempts to Contact Client: Case Note

- Go to the client's Notes tab and click "Add Note"
- Fill out Title, Date and Notes and click "Save"
- Notes added to the Notes tab are private to your agency



Document Attempts to Contact Client - Outreach Service

- Go to the client's Services tab
- For non-SSVF referrals, create a **[RRH Referral] Outreach** service
- For SSVF referrals, create a **[SSVF] Outreach Services**
- Fill out the Start Date/End as the date you attempted to locate the client, and click "Submit"
- If asked, track the time you spent trying to locate the client
- Leave the Service Note blank, as that note is shared with all HMIS users

Mrs Potts

PROFILE **SERVICES** HISTORY REFERRALS PROGRAMS ASSESSMENTS FILES NOTES LOCATION

[RRH Referral] Outreach ← Use this for all RRH referrals except SSVF referrals Case Management ^

Locate client with a RRH referral ^

Start Date: 02/21/2018 End Date: 02/21/2018

Time Tracking: None None

Include group members:

Chip Potts **Start and End Dates should be the same date - the date you attempted to locate the client**

Mr Beast **Track the amount of time spent in the Time Tracking section**

Service Note

B I

SUBMIT

[SSVF] Outreach services ← Use this for all SSVF referrals VA SSVF Service ^

Denying a Referral

Please contact the County before denying the referral

- Change Status to “Denied”
- Send to Community Queue - answer “Yes”
- Fill out Denied Reason and Denied Message
- Save changes

The referral will now appear in the Denied tab

REFERRAL: EDIT	
Client	Mrs Potts
Referred Program	[RRH CSJ] CM Program
Referred to Agency	SCC CM Agency (e.g. BWC, PATH)
Referring Agency	CCP ICM Agency (e.g. PATH)
Referred Date	10/23/2017 9:01 PM
Days Pending	0 day(s)
Qualified	Reassigned
Referred by Staff	Jenn Ong
Case Manager	Select ▾
Last Activity	10/23/2017 CHECK-IN
Status	Denied ▾
Send to Community Queue	-- Select -- ▾
Denied Reason	Select ▾
Denied Message	<input type="text"/>
Private	<input type="checkbox"/>
SAVE CHANGES	

2. Program Enrollment

Program Enrollment: Overview


Accept a referral by enrolling the client into the program

- Review the client's ROI
- Go to the client's Programs tab
- Enroll the client into the program, making sure the "Program Placement is a result of Referral..." is checked
 - **If you do not check this box, the referral will still appear on your list of open referrals**
- Include any household members that are included in the enrollment
- Complete the regular program enrollment process
- When you go back to the Referral tab, the referral will now appear in the Completed tab

Program Enrollment: Step-by-Step

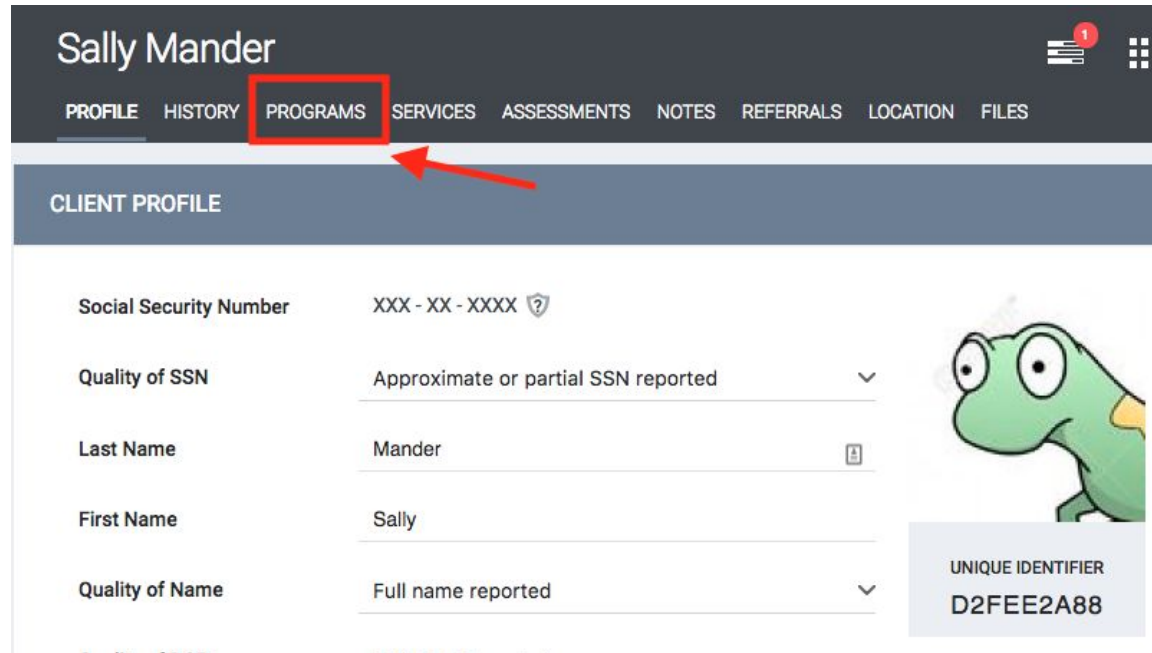
- On the client's Profile screen, click the shield icon
- Click the PDF to the right of the ROI to view it
- Follow the client's ROI when entering data into HMIS

The screenshot shows a user interface for a client profile. At the top, the client's name "Sally Mander" is displayed. Below the name are navigation tabs: PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, REFERRALS, LOCATION, and FILES. On the right side of the header, the user's name "Jenn Ong" and agency "SCC CM Agency (e.g. BWC, PATH)" are shown, along with a search icon and a "CASELOAD" link. A red arrow points to a shield icon in the top right corner, which is highlighted with a red box. Below the shield icon is a "Household Members" section with a "Manage" button. The main content area is titled "CLIENT PROFILE" and includes a "Social Security" section. Below this, there is a "RELEASE OF INFORMATION" section with a table of records. A red arrow points to a PDF icon in the table, which is also highlighted with a red box.

Agency Name	Permission	Type	Start Date	End Date	
Jenn Test Agency	Yes	Attached PDF	08/01/2017	08/01/2022	

Program Enrollment: Step-by-Step

Click on the Programs tab at the top of the client record



Sally Mander

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

CLIENT PROFILE

Social Security Number	XXX - XX - XXXX ?
Quality of SSN	Approximate or partial SSN reported
Last Name	Mander
First Name	Sally
Quality of Name	Full name reported


UNIQUE IDENTIFIER
D2FEE2A88

Program Enrollment: Step-by-Step


To enroll a client/household into a program, select the down arrow next to the applicable program under “Programs: Available”.

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
[CCP Housing Maintenance] Subsidy Program CCP Subsidy Agency (e.g. Abode)	10/01/2017	10/05/2017	Group 
Emergency Shelter Jenn Training Agency	09/01/2017	09/15/2017	Group

PROGRAMS: AVAILABLE

[RRH CSJ] CM Program	
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Program Enrollment: Step-by-Step

- Make sure all household members that are enrolling into the program are checked
- Make sure the “Program Placement a result of Referral” is checked
- Select Enroll

The screenshot shows a web form for program enrollment. At the top right, a red box contains the text "1 pending referral(s). Oldest 1 days." Below this, on the left, is a toggle switch labeled "Program Placement a result of Referral provided by CCP ICM Agency (e.g. PATH)", which is currently turned on. A red arrow points to this toggle. On the right, under the heading "Include group members:", there are two more toggle switches: "Chip Potts" (turned on) and "Mr Beast" (turned off). A red circle highlights both of these switches, with a red arrow pointing to the circle. At the bottom of the form, there are three buttons: "PRINT DIRECTIONS" with a printer icon, "DOC REQUIREMENTS" with a document icon, and "ENROLL" in a blue box with a white border. A red rectangle highlights the "ENROLL" button.

Program Enrollment: Step-by-Step

- Complete enrollment information for all household members
- If household is not housed at entry, leave “Housing Move-In Date” blank. (If household is housed at entry, use the enrollment date.)

Project Start Date	<input type="text" value="__/__/__"/> 
Relationship to Head of Household	Self (head of household) 
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) 
Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response) 
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT	
Housing Move-In Date	<input type="text" value="__/__/__"/>  Only fill out if client is housed

3. Status Assessments

Status Assessment: Overview

Create a Status Update Assessment if...

- The client moves into housing - make sure to fill in the “Housing Move-In Date”
- There are changes to income, benefits, health insurance, etc - make sure to update what has changed
- The client has been in the program for one year or longer - every year, create an **Annual Assessment**. The Status Date should be within 30 days of the client’s program anniversary.

Status Assessment: Step-by-Step

Go to the client's program enrollment. On the right side, click on the plus button next to Status Assessments.

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES SEARCH CASELOAD

PROGRAM: [RRH CSJ] CM PROGRAM

Enrollment **History** Provide Services Assessments Notes Files Forms × Exit

Program Service History LINK FROM HISTORY

There are no results to display

Managed with Clarity Human Services

23 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 10/01/2017

Assigned Staff: Jenn Ong

Head of Household: Sally Mander

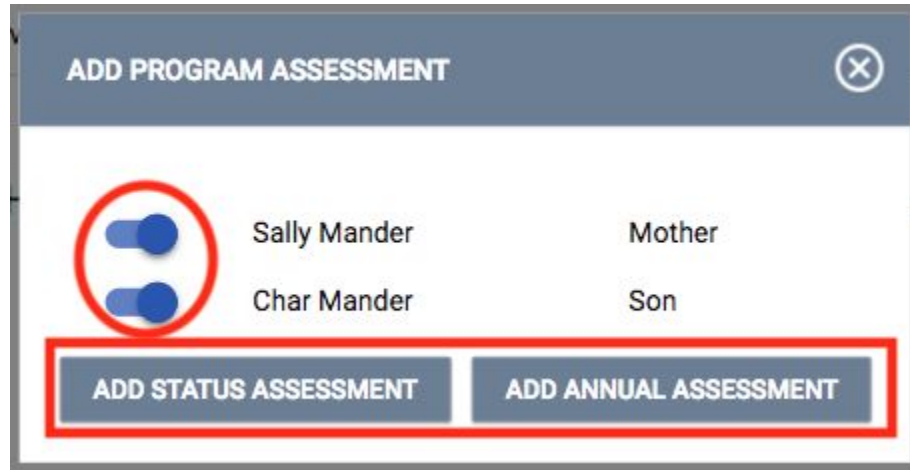
Program Group Members

Char Mander	10/01/17	Active
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Status Assessments + Add

Status Assessment: Step-by-Step

Check all the household members you want to update and choose either Status Assessment (for general changes) or Annual Assessment (within 30 days of the client's program anniversary).



The screenshot shows a mobile application interface for adding a program assessment. At the top, there is a dark blue header with the text "ADD PROGRAM ASSESSMENT" and a close button (an 'X' in a circle). Below the header, there is a list of household members. Each member has a blue toggle switch to their left. The first member is "Sally Mander" with the role "Mother". The second member is "Char Mander" with the role "Son". A red circle highlights the toggle switches for both members. At the bottom of the interface, there are two buttons: "ADD STATUS ASSESSMENT" and "ADD ANNUAL ASSESSMENT". A red rectangle highlights both buttons.

Member	Role
Sally Mander	Mother
Char Mander	Son

ADD STATUS ASSESSMENT ADD ANNUAL ASSESSMENT

Status Assessment: Step-by-Step

If the client has been housed, enter the date the client moved into a permanent housing unit under “Housing Move-in Date”. Be sure to update any other information about the client that has changed.

Project Status Date

Is the Program Type a Permanent Housing Program Type?

Yes (Automatically Generated Response)



COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

Status Assessment: Step-by-Step

- Complete or update all information on the screen. Be sure to note changes in income and benefits.
- Click Save & Next at the bottom of the screen for each household member and Save & Close for the last one.

NON-CASH BENEFITS

Receiving Non-Cash Benefits

No



HEALTH INSURANCE

Covered by Health Insurance

No



SAVE & CLOSE

CANCEL

4. SPDAT

SPDAT

- Complete a SPDAT within 30 days of program enrollment
- While client is in the program, complete a SPDAT every 90 days
- Choose the SPDAT (Single Adult, Family, or Youth) based on the household type

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

PROGRAM: [RRH CSJ] CM PROGRAM

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments

	LINK FROM ASSESSMENTS
Status Update Assessment	START
Annual Assessment	START
SPDAT	START

In the RRH CSJ Program, click Assessments tab. Click Start next to the appropriate version of the SPDAT.

Important Note

When you save the SPDAT, a screen with the SPDAT score will appear. do NOT click “Refer Directly to Community Queue” button at the bottom of the screen.

PROGRAM ELIGIBILITY DETERMINATION

SPDAT Score Summary

SPDAT PRE-SCREEN TOTAL 10

Category Agency Availability **SEARCH**

INELIGIBLE PROGRAMS

~~**REFER DIRECTLY TO COMMUNITY QUEUE**~~ **CANCEL**

5. Provide Services

Provide Services: Overview

- Find the service from the Provide Services list and enter in service dates and other service information
- Enter financial services under the head of household only:
 - Choose type of assistance (e.g. Rental Assistance, Security Deposit)
 - Fill out Start Date and End Date
 - Fill out Expense Date and Expense Amount
 - If an “Other” funding source or type of assistance was provided, specify what type in the Notes section

For [RRH CSJ] programs, The Health Trust Rental Subsidy Administrator will enter any financial assistance services provided by their team (e.g. subsidy assistance for security deposits or monthly rent)

Standard RRH Services

Financial Services

Rental assistance
Utility fee payment assistance
Utility deposit
Security deposit
Moving costs
Transportation services: tokens/vouchers
Transportation services: vehicle
repair/maintenance
Child Care
Motel
Other

Supportive Services




Outreach services
Case management services
Assistance obtaining/coordinating public
benefits

Note: *These services are listed for every RRH program. Your agency may have additional services listed - check with your HMIS Agency Administrators if you have any questions.*

Services for Supportive Services Administrators

- Go to client's program enrollment
- Click on Provide Services tab
- Choose service and fill out information (Service Note can be blank). Click "Submit".

The screenshot shows a web application interface for providing services. At the top, there is a dark navigation bar with tabs: PROFILE, HISTORY, PROGRAMS (highlighted with a red box), SERVICES, ASSESSMENTS, NOTES, REFERRALS, LOCATION, and FILES. Below this is a blue header bar that reads "PROGRAM: [RRH CSJ] CM PROGRAM". Underneath, there is a secondary navigation bar with tabs: Enrollment, History, Provide Services (highlighted with a red box), Assessments, Notes, Files, and Forms. An "Exit" button is located on the far right of this bar. The main content area is titled "Services" and contains a table with three rows. The first row is "Assistance obtaining/coordinating public benefits" with a dropdown menu set to "Case Management" (highlighted with a red circle and a red arrow). The second row is "Case Management" with a dropdown menu set to "Case Management". The third row is "Outreach" with a dropdown menu set to "Outreach Contact".

Services	
Assistance obtaining/coordinating public benefits	Case Management 
Case Management	Case Management 
Outreach	Outreach Contact 

Services for Rental Subsidy Administrator

- Go to client's program enrollment
- Click on Provide Services tab
- For Rental Assistance:
 - Choose Funding Source, if needed
 - Fill out Start Date/End Date to cover the entire month
 - Fill out Expense Date as date the assistance was provided
 - Fill out Expense Amount
- For other financial assistance (e.g. Security Deposit)
 - Fill out Start Date/End Date and Expense Date as date the assistance was provided
 - Fill out Expense Amount

PROFILE SERVICES HISTORY REFERRALS **PROGRAMS** ASSESSMENTS FILES NOTES LOCATION

PROGRAM: [RRH CSJ] CM PROGRAM

Enrollment History **Provide Services** Assessments Notes Files Forms ✕ Exit

Services

[RRH CSJ] Rental Assistance Rental Assistance ^

HALA ▼
If needed, choose funding source
HOME ^

Start Date: 01/01/2018 📅 End Date: 01/31/2018 📅
Expense Amount: 0.00 Expense Date: 01/01/2018 📅

Funding Source: HOME ▼

Service Note

B *I* 1/2 0/0

SUBMIT

CSJ Services Requested by THT Rental Subsidy Administrators

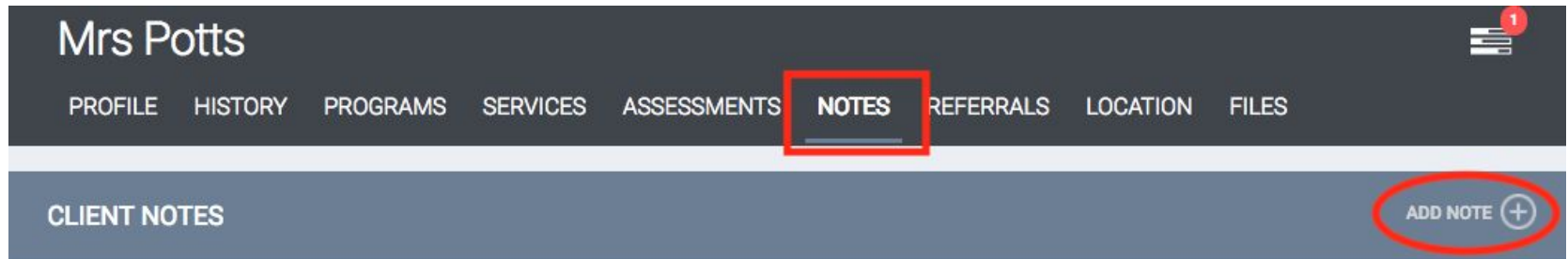
- Complete Intake Application Received
 - Start/End Dates should be the date the application was received
- Coupon Issuance
 - Start/End Dates should be date the coupon was issued
- HQS Inspection Completed
 - Start/End Dates should be date the HQS Inspection was completed
- Tenant Portion of Rent
 - Start/End Dates should cover the entire month
 - Expense Date should be date the assistance was provided
 - Expense Amount should be the amount of rent the tenant pays
 - Note: the Tenant Portion of Rent and Rental Assistance during the same month should total that month's rent

6. Case Notes

Case Notes

Enter case notes in the Notes tab, not under the Program tab

- Go to the client's Notes tab and click "Add Note"
- Fill out Title, Date and Notes and click "Save"



7. Program Exit

Program Exit: Overview

- When a client exits the program, click the Exit button
- Choose all household members that are exiting
- If client was housed at exit and will be staying in the same rental unit, check the box that says: “Did the client stay in the same rental unit at exit (transition in place)?”

Program Exit: Step-by-Step

On the right side of the program tab bar, click Exit.

The screenshot shows a user interface for managing a program. At the top, the user's name 'Sally Mander' is displayed, along with navigation icons and a notification badge. Below this is a menu with options: PROFILE, HISTORY, PROGRAMS (selected), SERVICES, ASSESSMENTS, NOTES, REFERRALS, LOCATION, and FILES. On the right, there is a search bar and a 'CASELOAD' button. The main content area shows the program name 'PROGRAM: [RRH CSJ] CM PROGRAM' and a sub-menu with options: Enrollment, History (selected), Provide Services, Assessments, Notes, Files, and Forms. A red arrow points to a red-bordered button labeled '× Exit' in the sub-menu. Below the sub-menu, the text 'Program Service History' is visible, followed by 'LINK FROM HISTORY' and 'There are no results to display'. On the right side, there is a summary card for '23 DAYS ACTIVE PROGRAM' and a table of program details.

Program Type:	Group (2)
Program Start Date:	10/01/2017
Assigned Staff:	Jenn Ong <input checked="" type="checkbox"/>
Head of Household:	Sally Mander <input checked="" type="checkbox"/>

Program Group Members

Program Exit: Step-by-Step

Check all the household members who are exiting and click End Program.

SELECT CLIENTS TO EXIT FROM PROGRAM

<input checked="" type="checkbox"/>	Sally Mander	Mother
<input checked="" type="checkbox"/>	Char Mander	Son

End Program

Program Exit: Step-by-Step

The Transition In Place question appears if the head of household has a Housing Move-In Date. It should be checked if the client is staying in the same rental unit that they were placed into during their time in RRH.

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

09/01/2017



Did the client stay in the same rental unit at exit (transition in place)?



Program Exit: Step-by-Step

- Complete or update all information on the exit screen. Be sure to note changes in income and benefits.
- Click Save & Next at the bottom of the Exit Screen for each household member and Save & Close for the last one.

NON-CASH BENEFITS

Receiving Non-Cash Benefits No

HEALTH INSURANCE

Covered by Health Insurance No