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

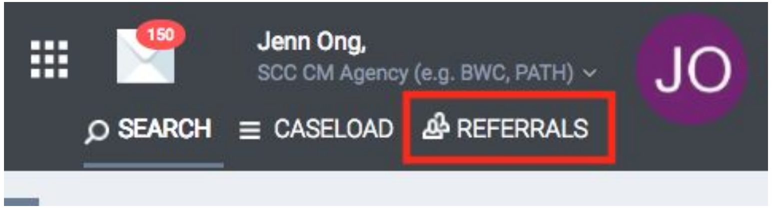
1. Managing Referrals

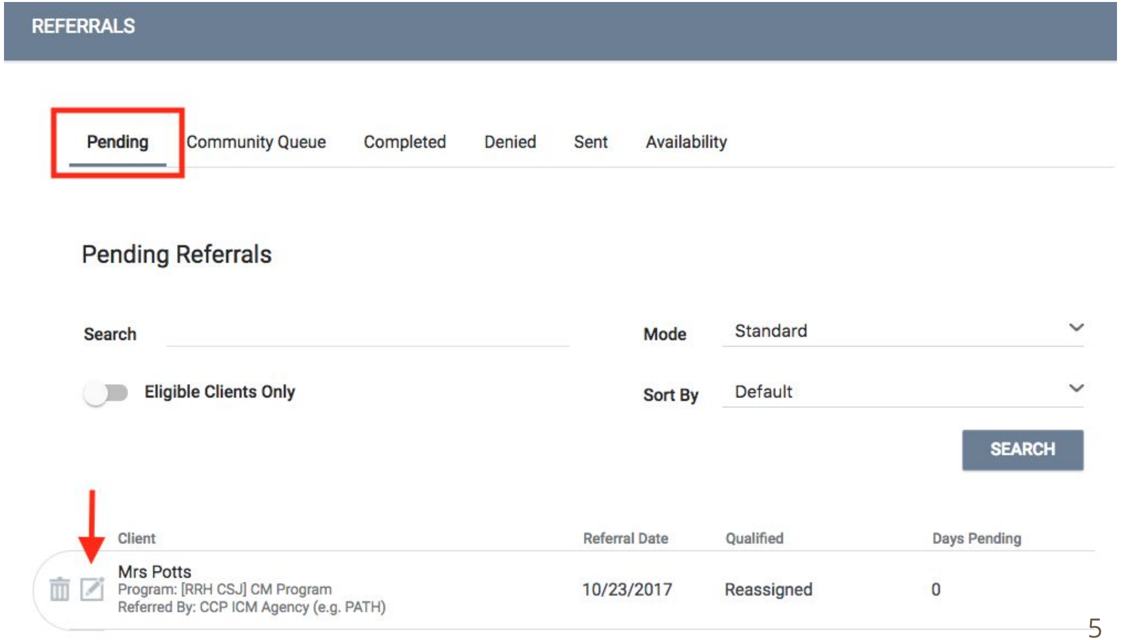
Managing Referrals - Overview

- 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

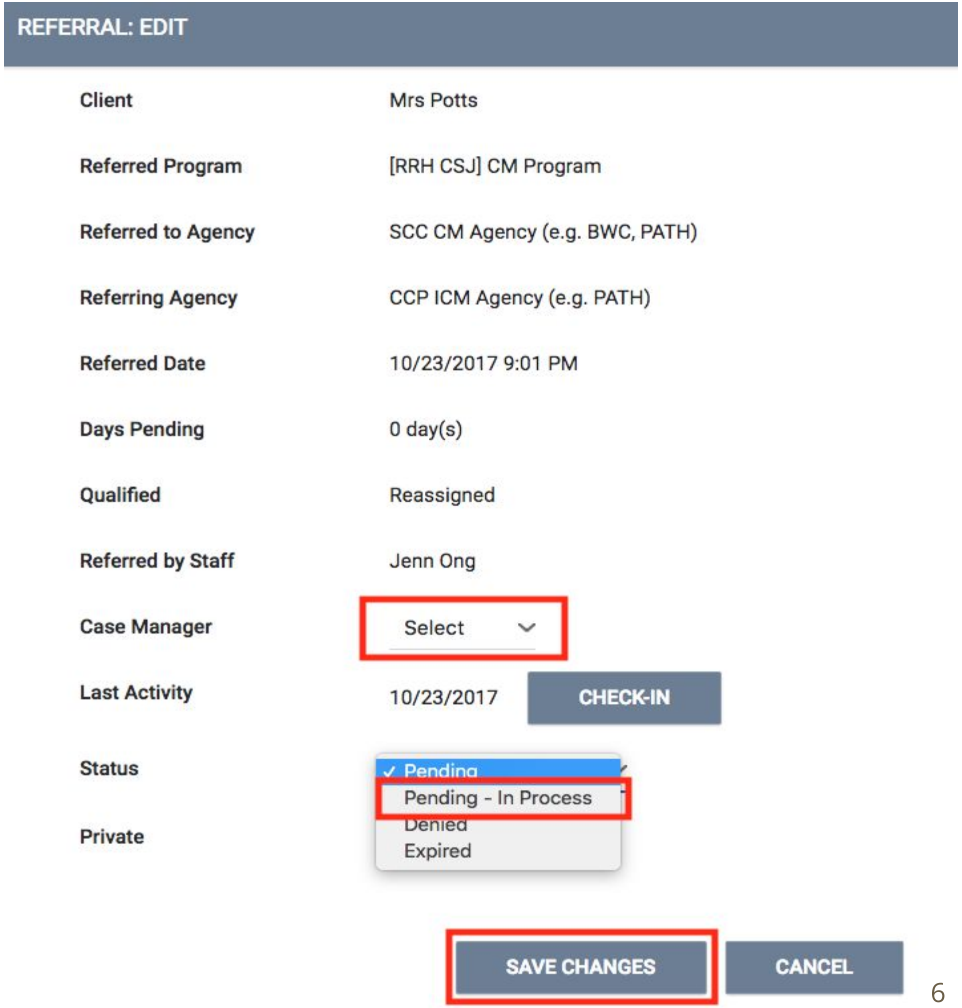
- On Search screen, go to Referrals tab
- Pending tab shows referrals to your agency
- Click Edit icon to the right of the referral you want to view





Mark Referral as "In Process"

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



Attempts to Contact Clients

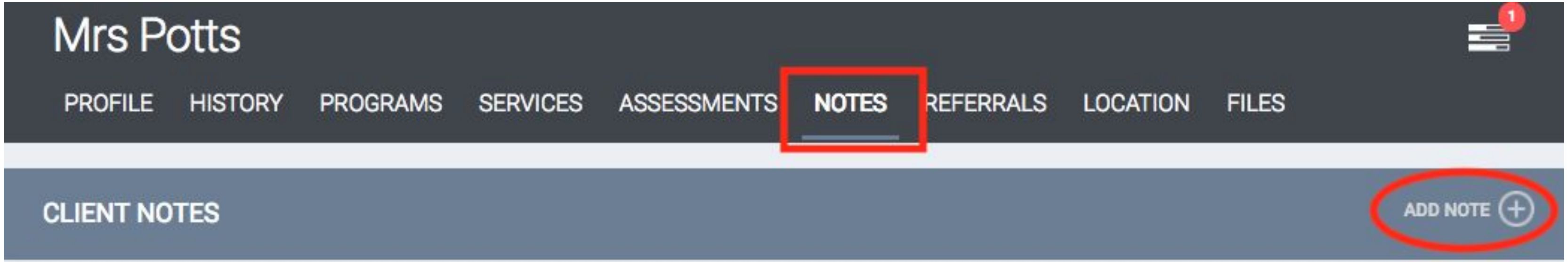
- Finding the client - Clarity can help
  - “Where is it easiest to find you…” questions in VI-SPDAT
  - Location tab
  - Client’s History tab (program/service history)
  - Assigned staff at latest program enrollment
  - Public alerts
- **Document your attempts to contact client in the Notes tab and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

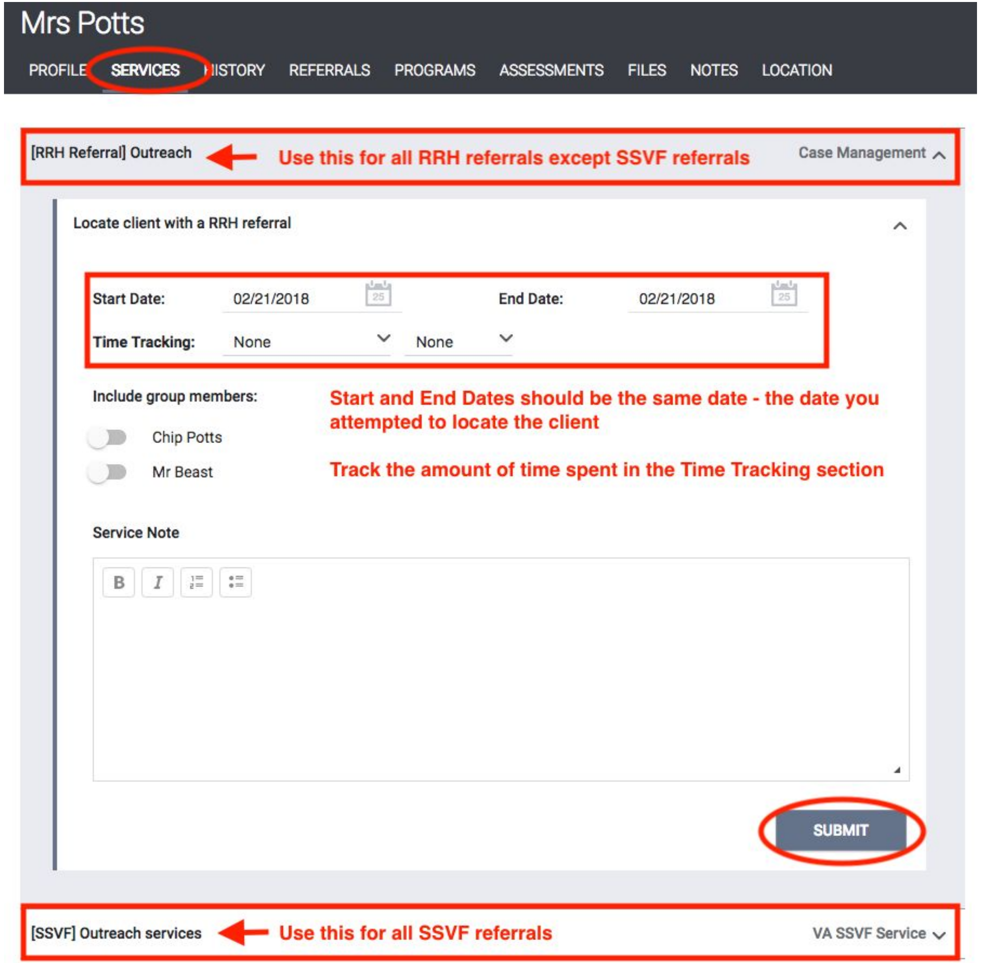
Document Attempts to Contact Client: Case Note

- 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

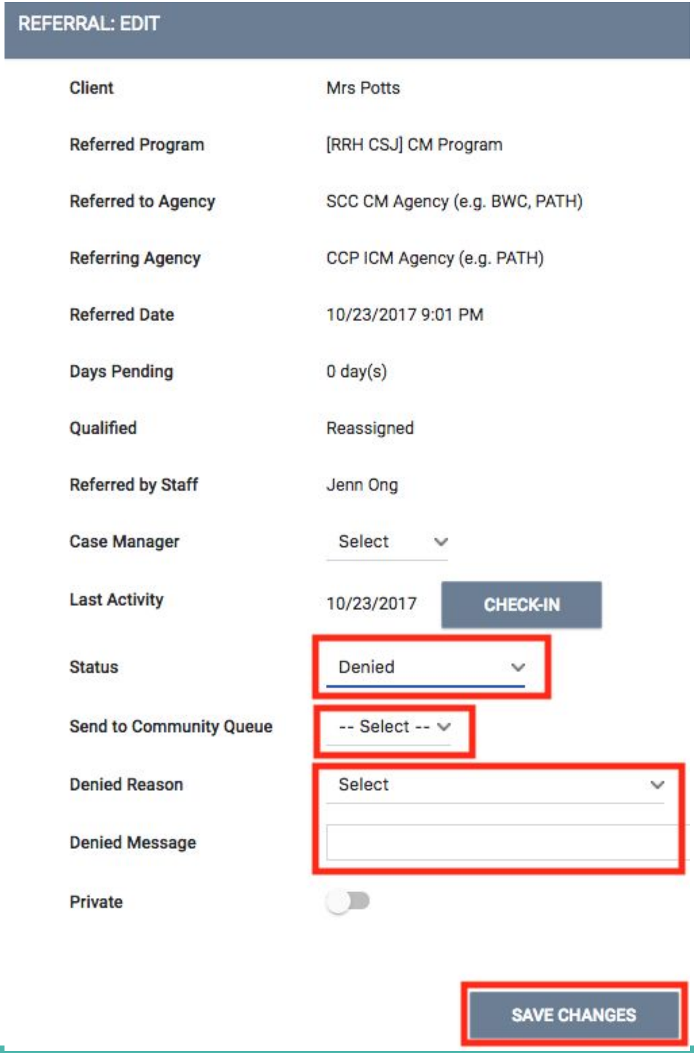


Denying a Referral

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



2. Program Enrollment

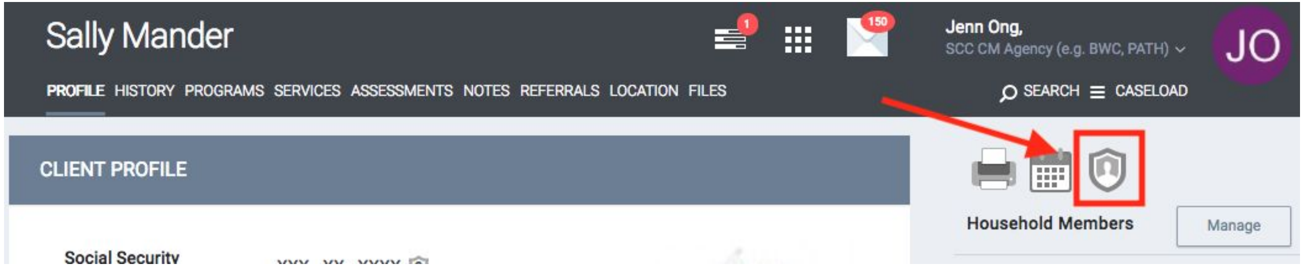
Program Enrollment: Overview

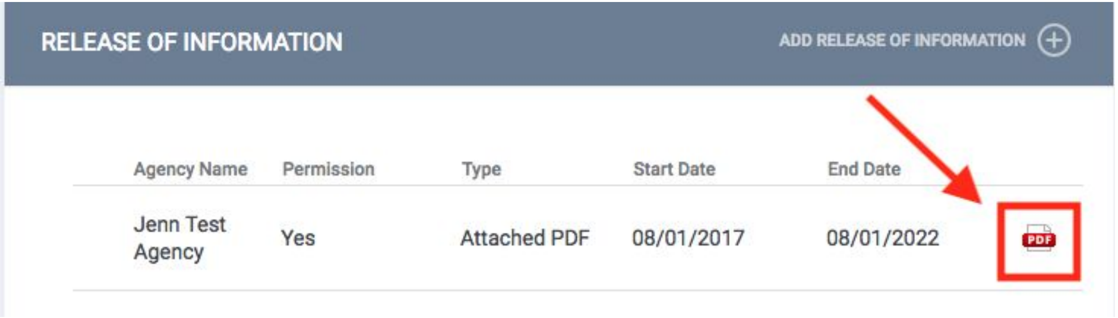
Accept a referral by enrolling the client into the program

- 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

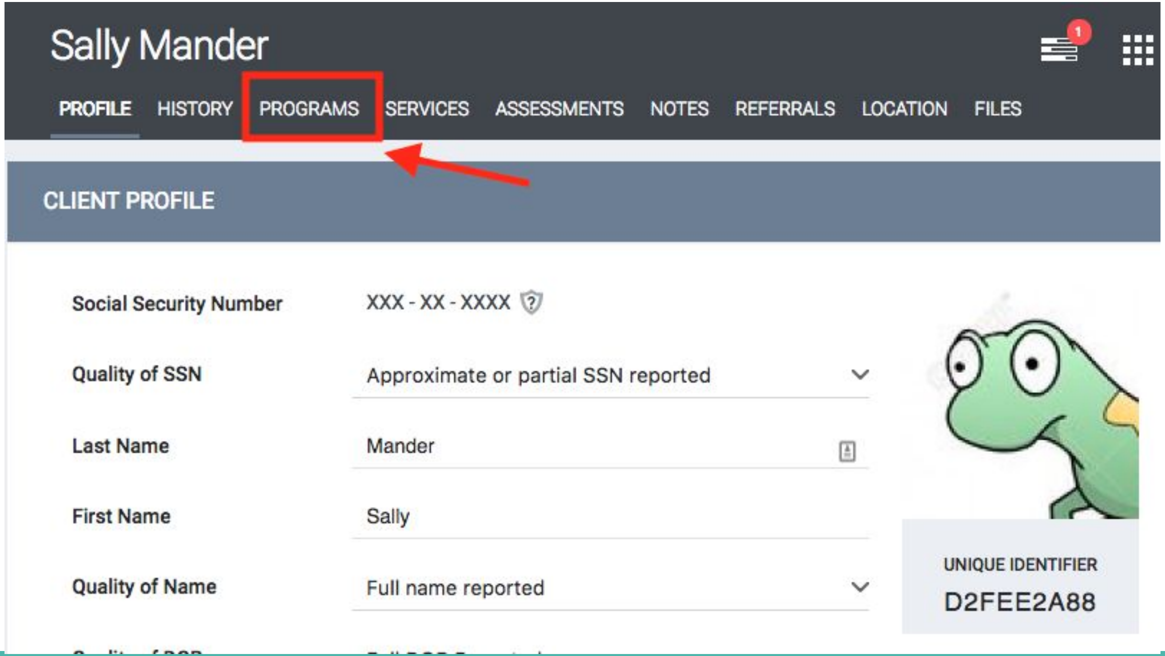
- On the client's Profile screen, click the shield icon
- Click the PDF to the right of the ROI to view it
- Follow the client's ROI when entering data into HMIS





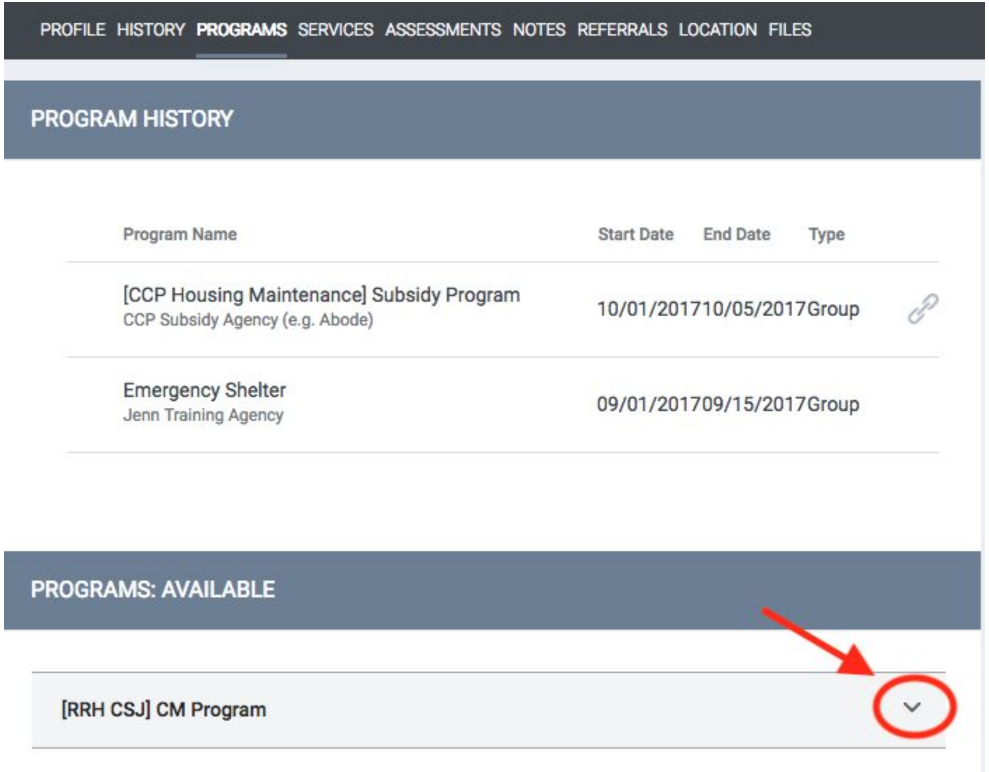
Program Enrollment: Step-by-Step

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



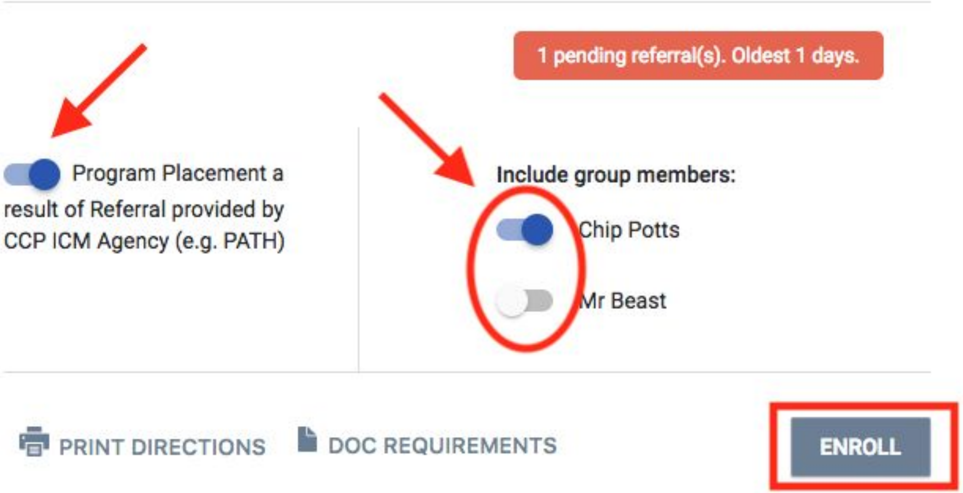
Program Enrollment: Step-by-Step

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



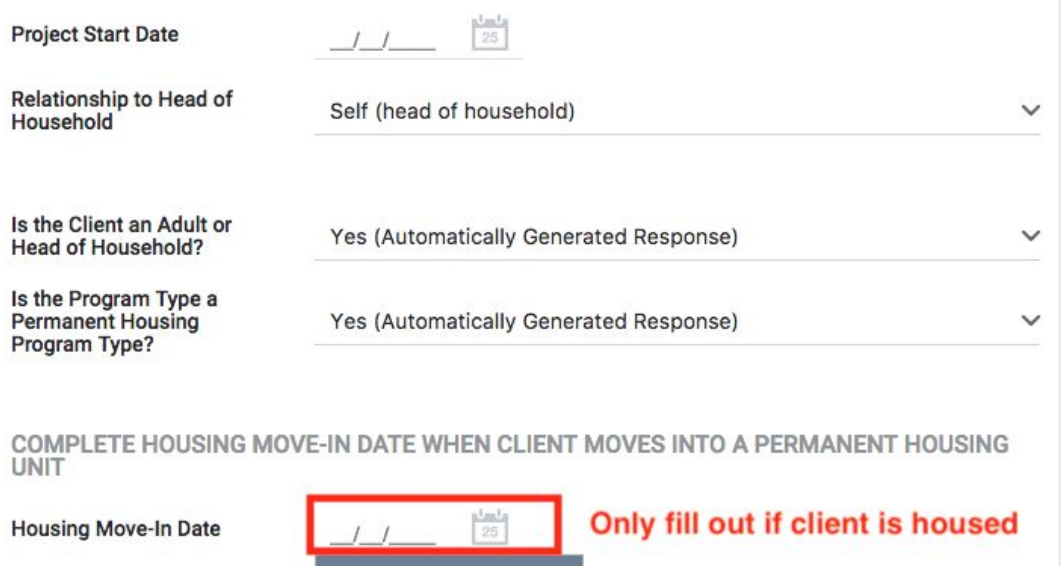
Program Enrollment: Step-by-Step

- 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



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.)



3. Status Assessments

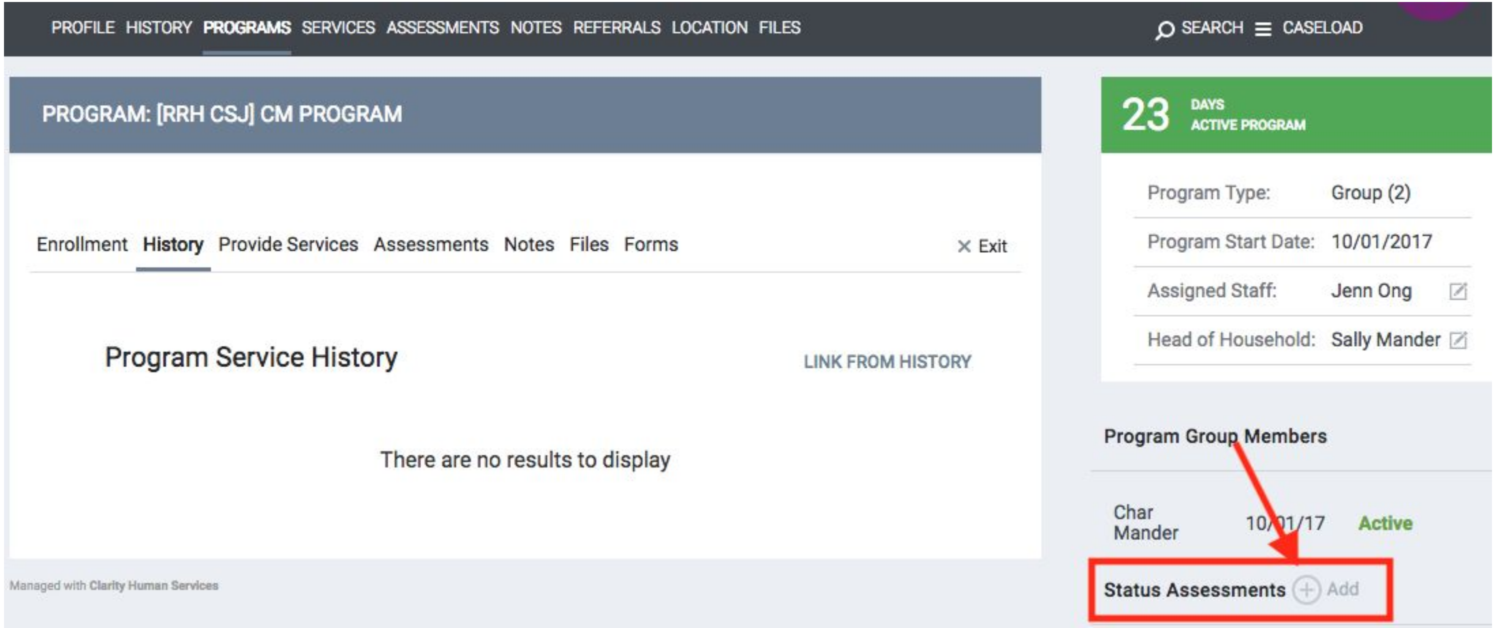
Status Assessment: Overview

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.

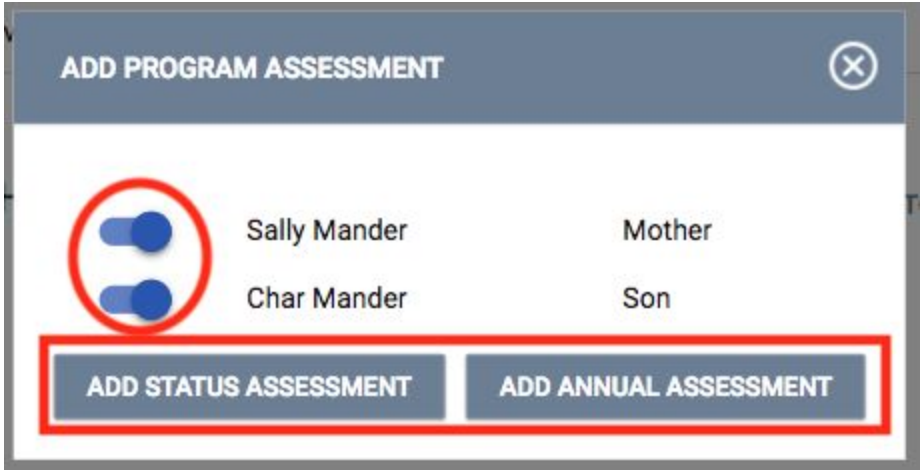
Status Assessment: Step-by-Step

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



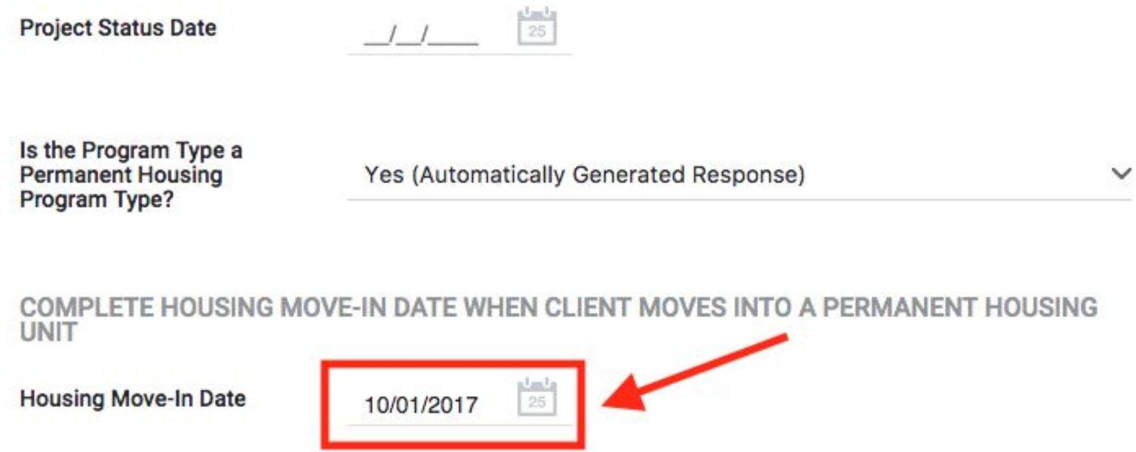
Status Assessment: Step-by-Step

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).



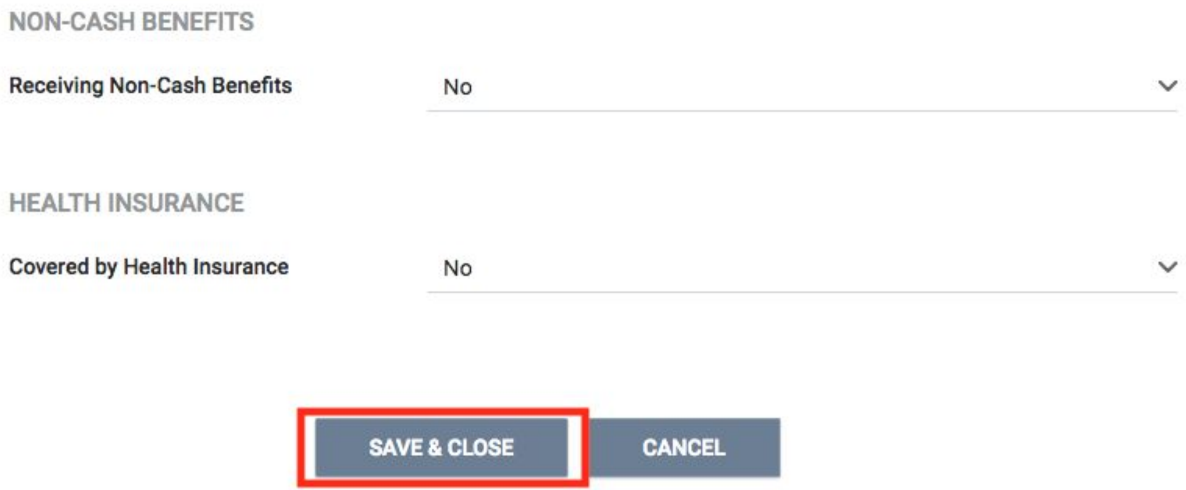
Status Assessment: Step-by-Step

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.



Status Assessment: Step-by-Step

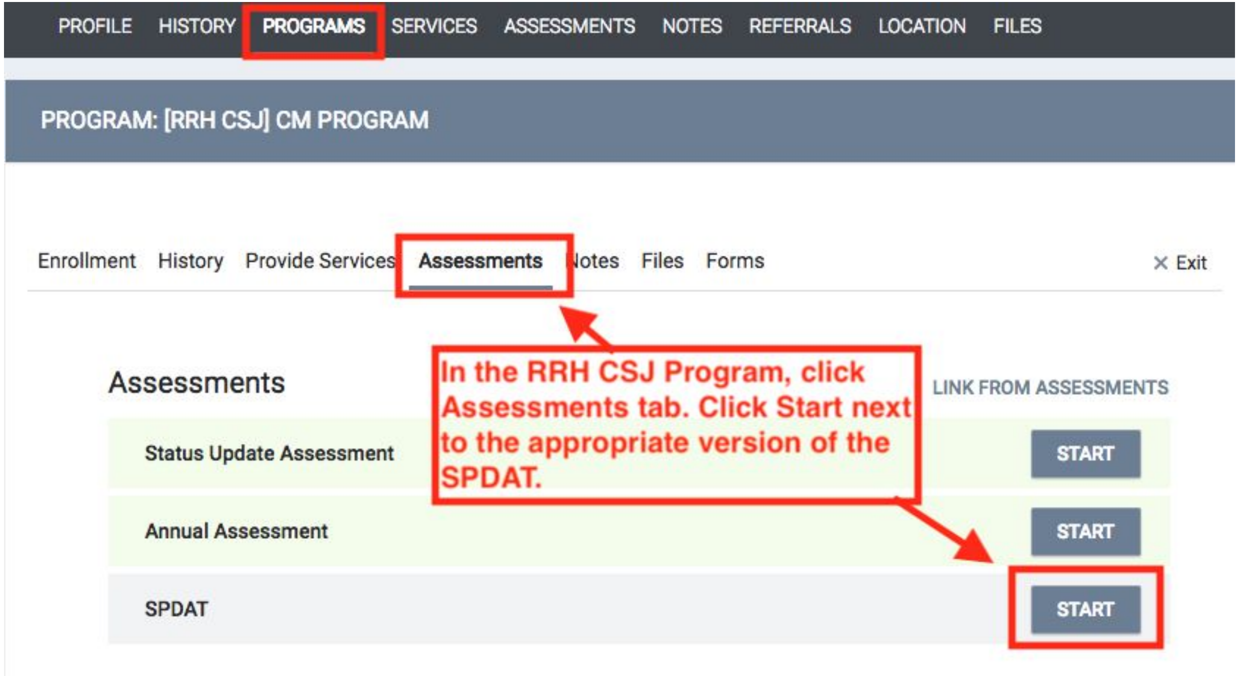
- Complete or update all information on the screen. Be sure to note changes in income and benefits.
- Click Save & Next at the bottom of the screen for each household member and Save & Close for the last one.



4. SPDAT

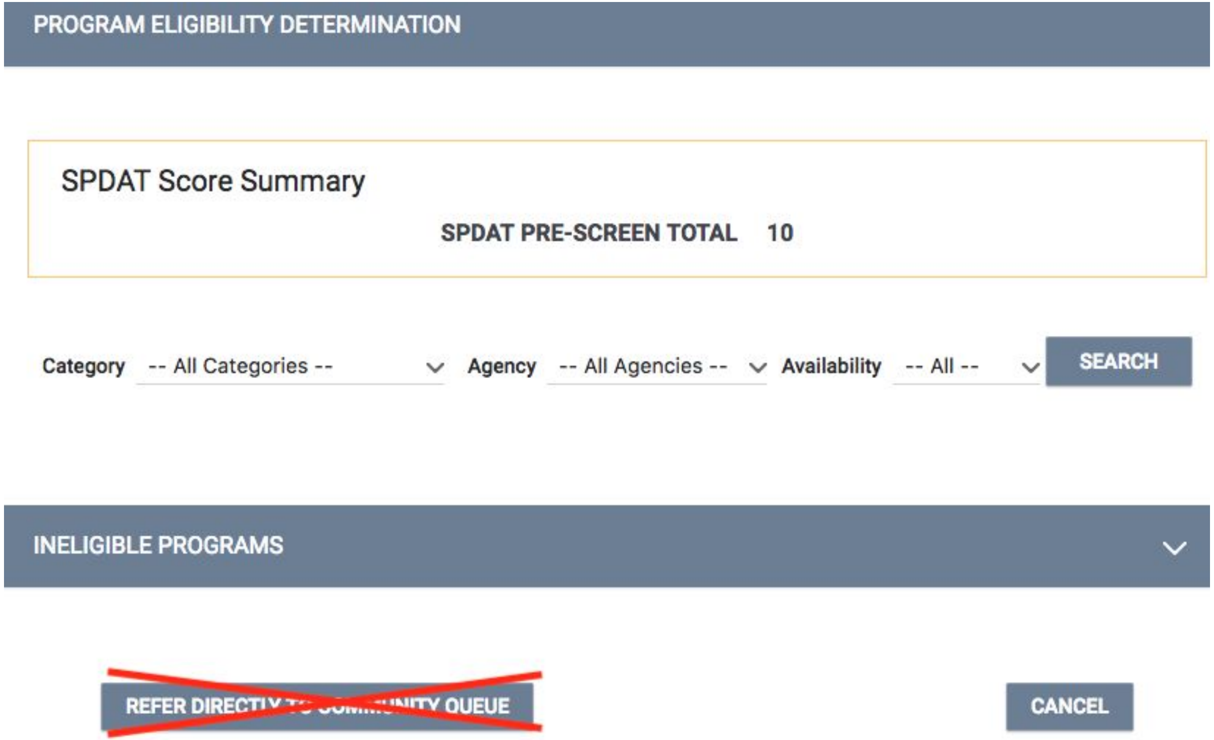
SPDAT

- 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



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.



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

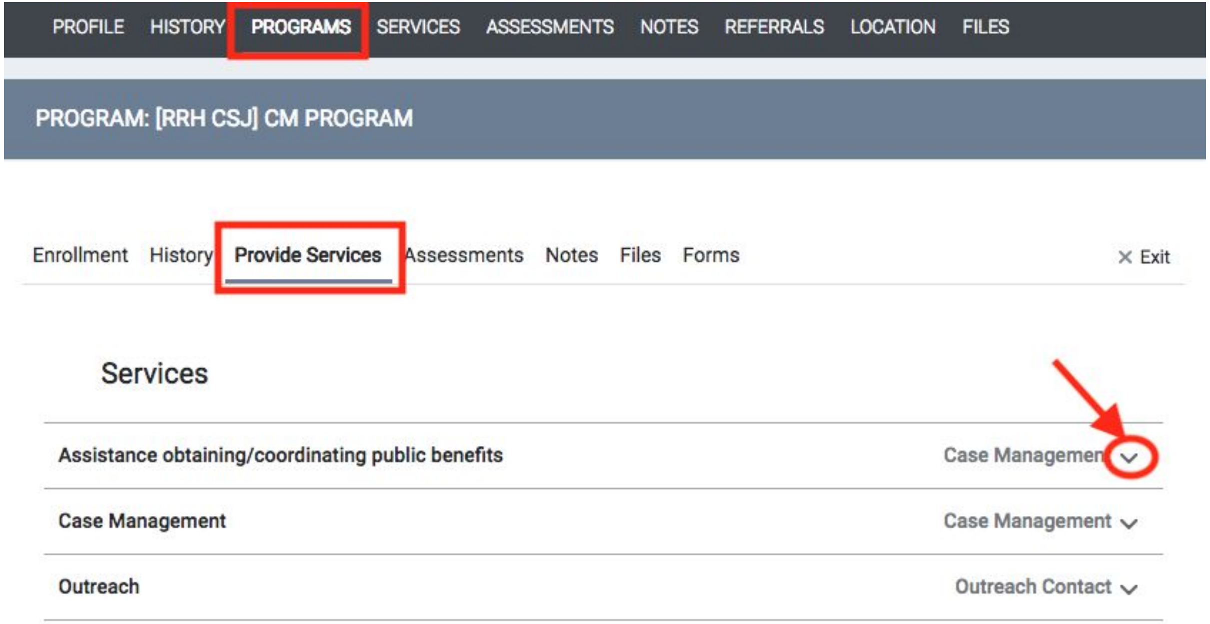
Financial Services
Rental assistance
Utility fee payment assistance
Utility deposit
Security deposit
Moving costs
Transportation services: tokens/vouchers
Transportation services: vehicle repair/maintenance
Child Care
Motel
Other

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.*

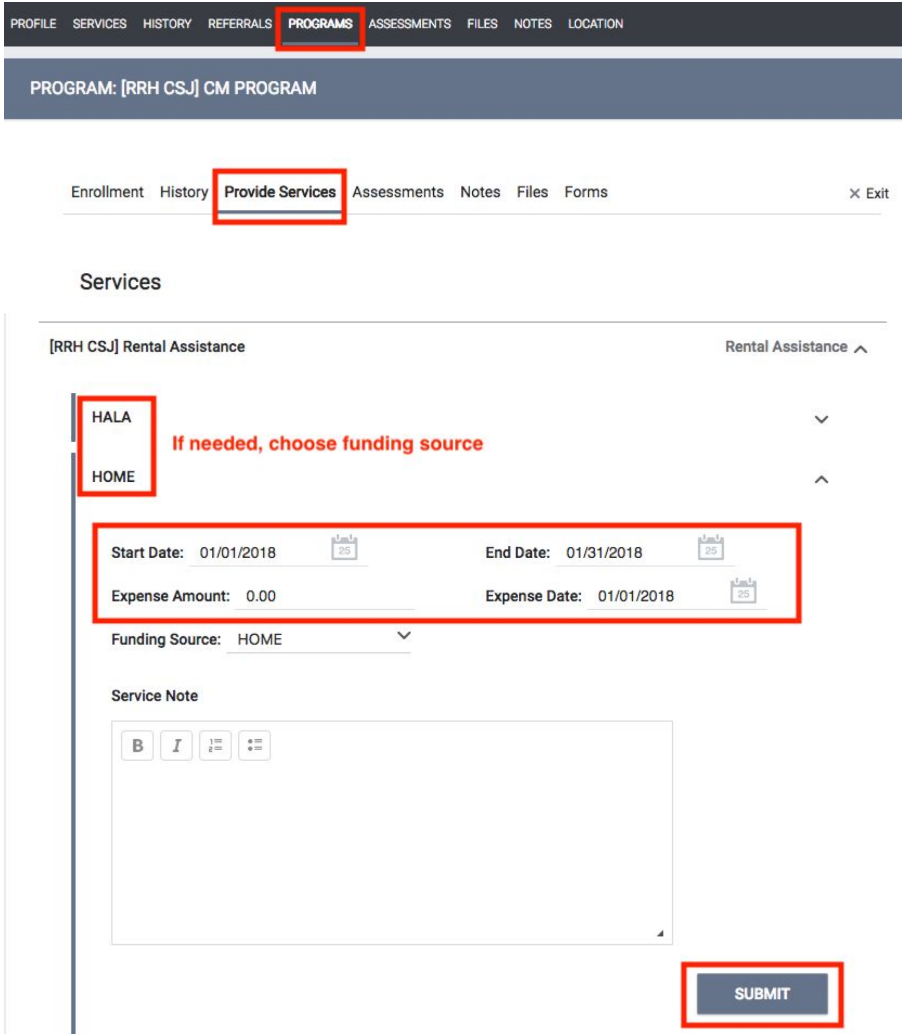
Services for Supportive Services Administrators

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



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



CSJ Services Requested by THT Rental Subsidy Administrators

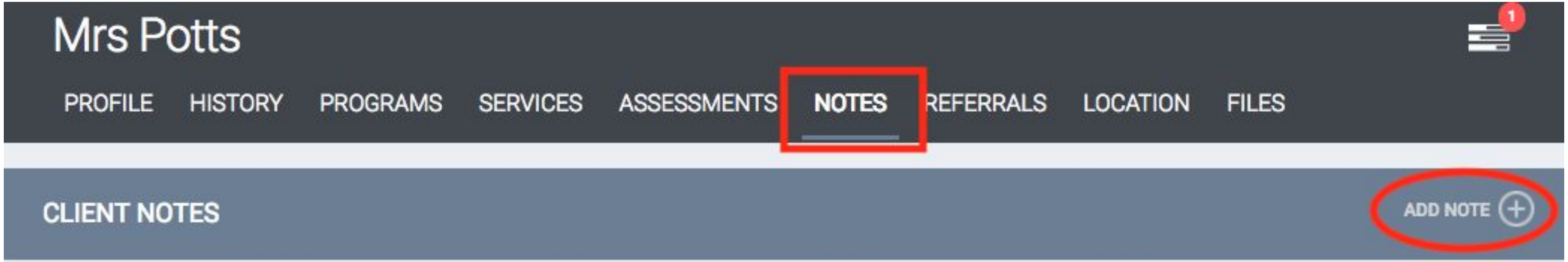
- Complete Intake Application Received
  - Start/End Dates should be the date the application was received
- Coupon Issuance
  - Start/End Dates should be date the coupon was issued
- HQS Inspection Completed
  - Start/End Dates should be date the HQS Inspection was completed
- Tenant Portion of Rent
  - 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"



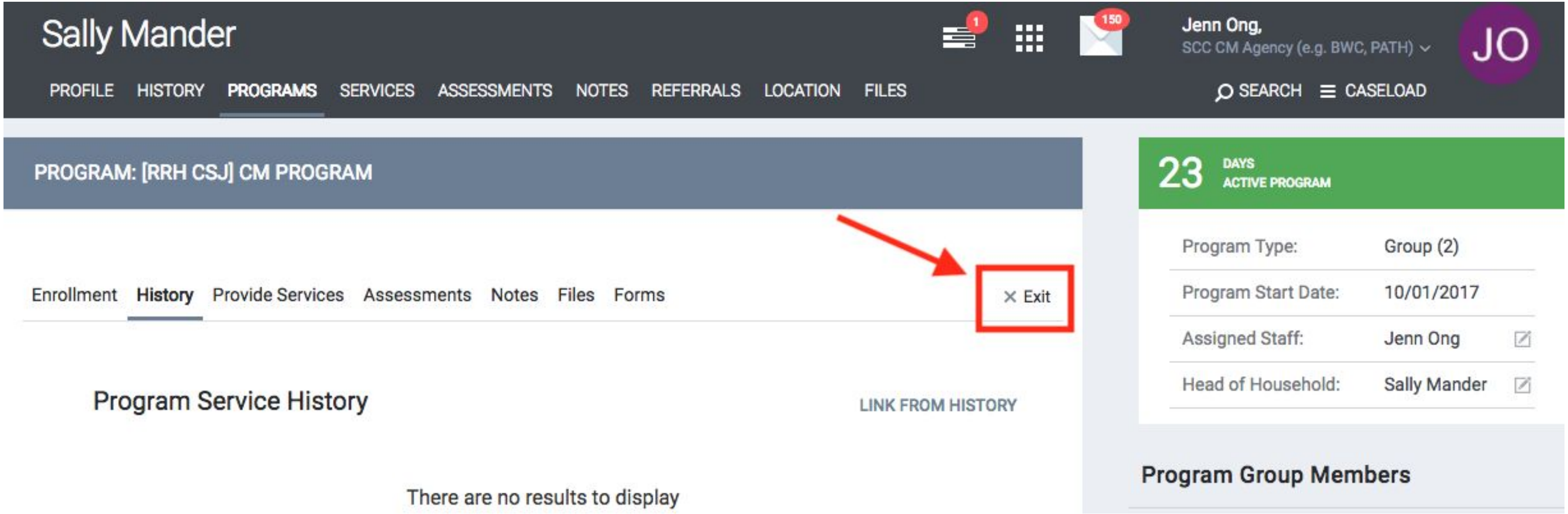
7. Program Exit

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.

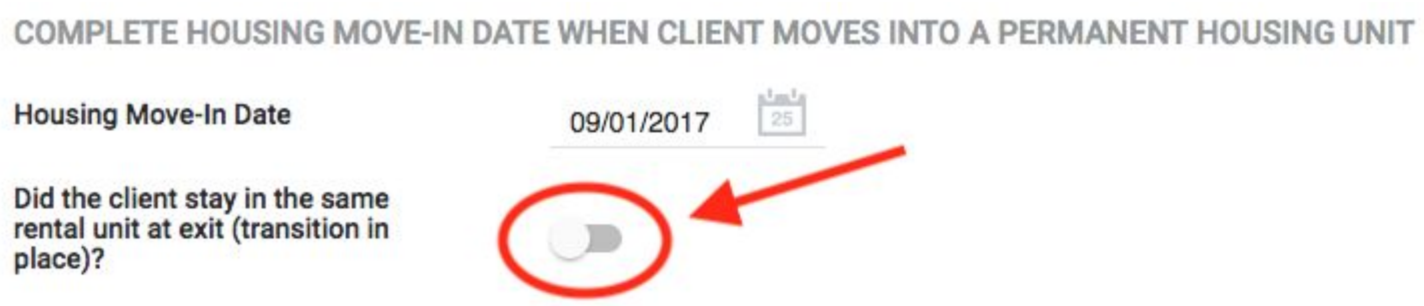


Program Exit: Step-by-Step

Check all the household members who are exiting and click 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.



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.