RRH Workflow Training





The RRH Workflow Process

- A. Managing Referrals
- B. Documenting Outreach Attempts
- C. Program Enrollment
- D. Status Assessment
- E. Annual Assessment
- F. <u>SPDAT</u>
- G. Provide Services
- H. Program Exit



A. 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 and Services Tab

- If denying the referral, send the referral back to the Community Queue
- If accepting the referral, move on to Program Enrollment



How to Check for Referrals



- 1. Select the **REFERRALS** Tab directly under username
- 2. You will be redirected to the **Referrals** screen
- From the options available select the Pending tab - this will populate any pending referrals
- From the list provided, identify the client(s) and then select the "edit" icon (small square with pencil)
- 5. You will then be redirected to the **Referral** Edit screen

REFERRALS							
Dashboard Pen	ding Community Queue	Analysis Completed	Denied	Sent Availabi	ility Open U	Inits	
Pending Ref	errals						
Search				Mode	Standard		~
Sort By	Default		~	Characteristic	Select		~
Eligible C	lients Only						SEARCH
Client				Referral Date		Qualified	Days Pending
The second secon	H CSJ] PATH TRAINING] Abode Services (j)			8 05/25/2021		No	0 total 0 pending



Editing the Referral

- 1. Assign a **Case Manager** if there is one *this is optional*
- Change the Status to Pending in
 Process from the options
- 3. SAVE CHANGES when done

REFERRAL: EDIT

Client	King Cake
Referred Program	[RRH CSJ] PATH
Referred to Agency	[TRAINING] PATH
Referring Agency	[TRAINING] Abode Services
Referred Date	05/25/2021 12:17 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Νο
Referred by Staff	Lesly Soto 🕦
Case Manager	Select 🗸
Last Activity	05/25/2021 CHECK-IN
Status	✓ Pending Pending - In Process
Private	Denied Expired
	SAVE CHANGES CANCEL



Denying a Referral

Please contact the County before denying the referral

- Status: Denied
- Send to Community Queue: Yes
- Denied By Type: Provider or Client
- **Denied Reason:** Select from drop down options
- **Denial Information:** Enter note
- SAVE CHANGES

The referral will now appear in the Denied tab

REFERRAL: EDIT	
Client	King Cake
Referred Program	[RRH CSJ] PATH
Referred to Agency	[TRAINING] PATH
Referring Agency	[TRAINING] Abode Services
Referred Date	05/25/2021 12:17 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	No
Referred by Staff	Lesly Soto 🕡
Case Manager	Select Y
Last Activity	05/25/2021 CHECK-IN
Status	Denied 🗸
Send to Community Queue	Yes 🗸
Denied By Type	Provider 🗸
Denied Reason	Needs could not be met by program
Denial Information	Enter note
Private	
	SAVE CHANGES CANCEL



B. Documenting Outreach Attempts



Finding the Client-Clarity Can Help



Use the VI-SPDAT: "Where is it easiest to find you..."

Location Tab - Clients location



Contact Tab - Clients phone number & email address



History Tab - Clients program/service history



Care Team - Who has worked with the client

Public Alerts- provide a way to direct staff members to important information within a client record by displaying an alert.

Document your attempts to contact clients in the Notes and/or Services Tabs

- Include the details of your attempt in the Notes tab *Case Note*.
- Record the [RRH Referral] Outreach service for reporting purposes - *Services Tab.*



Entering Attempts to Locate a Client in HMIS

Adding a Case Note in the NOTES section

- 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

- This is entered at the Agency Level
- Select the SERVICES tab
- A list of available services will be provided
- For non-SSVF referrals, create a [RRH Referral] Outreach Service
- For SSVF referrals, create a **[SSVF] Outreach** Service
- Fill out the Start Date/End as the date you attempted to locate the client, and click "Submit"
- Track the time you spent locating the client; this may be optional (check w/your lead)
- Leave the Service Note blank; this note will be visible to all HMIS users



Document Attempts to Contact Client - Outreach Service

King Cake profile history program services assessments notes files contact locatio	[RRH Referral] Outreach	Case Management 🗸
SERVICES	Locate client with a RRH referral Start Date: 05/26/2021 Ime Tracking: None V None Start/End Date should be the same date - the date you attempted to locate the client	v
Security Deposit [HP Financial] Housing Industry Foundation (HIF) [HP Financial] Housing Trust	Include group members: Alex Rodriguez Private Test Private Service Note :	
[HP Financial] Other Funding Source [HP Financial] Seasons of Sharing (SoS) [RRH Referral] Outreach Use this for all RRH Referrals except SSVF referrals. [TH Referral] Outreach	B I ;= := DO NOT ENTER NOTE HERE.	
		SUBMIT



C. 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





Program Enrollment: Step by Step





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.)

Enroll Program for client King Cake							
Project Start Date	05/26/2021						
Zip Code of Last Address	95020						
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 MOV UNIT	VE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING	Ì					
Housing Move-In Date	_/ / 🔁 Only Add date is client is housed.						



D. Annual Assessment



Annual Assessment: Overview

Annual Assessments are required...

- 30 days before or after the Head of Household's enrollment anniversary
- Required for all project types and all Household Members
- Do not complete if the client is enrolled less than a year
- If you miss the anniversary date for entering an assessment
 - You can reenter the most recent assessment again; but back date it
 - Edit the date on an existing one, if it is off by a few weeks, days, etc.
 - If you have the paper assessment on file, but never entered it; do so
 - Ensure there are not 2 assessments for the same year



Annual Assessment: Step by Step

Go to the client's program enrollment. On the Assessments Tab, from the list of options select the **Annual Assessment** and select the **START** button.

PROGRAM: [RRH CSJ] PATH	14 даче реобрам
Enrollment History Provide Services Assessments Notes Files Forms × Exit Assessments	Program Type: Individual Program Start Date: 05/26/2021 Assigned Staff: Lesly Soto Head of Household: King Cake
Current Living Situation START	Program Group Members 🕀
Status Update Assessment START Annual Assessment START	No active members Status Assessments 🕂

Check all the household members for whom you will complete an Annual Assessment (within 30 days of the HoH's program start date anniversary).





Annual Assessment: Step by Step

- Complete all information on the screen. Be sure to enter all information about Disabling Conditions and Income and Sources.
- Click Save & Next at the bottom of the screen for each household member and Save & Close for the last one.

~
~



E. Status Assessment



Status Assessment: Overview

Create a Status Update Assessment if...

- 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 Annual Assessment Date should be within 30 days (before or after) the client's program start date 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.

PROG	RAM: [RRH CSJ] PATH				C	DAYS ACTIVE PROGRAM		
						Program Type:	Individual	
						Program Start Date:	05/26/2021	
E	nrollment History Provide Services Assessments Notes Files Forms			× Exit		Assigned Staff:	Lesly Soto	
						Head of Household:	King Cake	
	Program Service History			LINK FROM HISTORY				
	Service Name	Start Date	End Date		F	Program Group Memb	ers 🕀	
	Referral: [RRH CSJ] PATH [TRAINING] Abode Services referral to [TRAINING] PATH 🕢	8 05/26/2021	05/26/2021			No active members		
	Referral: [RRH CS.J] PATH [TRAINING] Abode Services referral to [TRAINING] PATH 🕢	8 05/25/2021	05/25/2021		5	tatus Assessments (Ð	

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 HoH's program start date anniversary).





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.





REMINDER: *Record Move-in Date on Enrollment Screen*

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.

King Cake PROFILE HISTORY PROGRAMS SERVIC PROGRAM: [RRH CSJ] PATH	CES ASSESSMENTS
Enrollment History Provide Ser	COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT Housing Move-In Date



F. SPDAT



SPDAT

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



Finding and Recording the SPDAT





G. 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)
- For service expense date the <u>Start</u>
 <u>Date is the start of the month</u>, the <u>End</u>
 <u>Date is the last day of month</u> and
 <u>Expense date is the check date</u>
- Fill out Expense Amount
- If an "Other" funding source or type of assistance was provided, specify what type in the Notes section

Financial Assistance	Financial
General Financial assistance Start and End Date should be the month for which the assistance was provided. For example if providing financial assistance for RENT, it should be the start and end date of the month the rent was paid for.	^
Start Date: 03/01/2023 💼 End Date: 03/31/2023 🛅	
Expense Amount: 500.00 Expense Date: 03/16/2023	
Funding Source: No Funding Source	
The Expense Date should be the day the check date.	
B I III	
	UBMIT



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 will be listed for all RRH programs. Only enter services that your program provides.



Standard RRH Services

	King (PROFILE	Cake ніsто	RY PR	OGRAMS	SERVICES	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS	
I	PROGRAM	I: [RRH (SJ] PAT	Ή								
	Enroll	ment	History	Provide	Services	Assessments	Notes	Files	Forms			× Exit

- Go to client's program enrollment
- Click on **Provide Services** tab
- Choose service and fill out information (Service Notes are **not** required and are visible to all HMIS users. When in doubt, leave the Service Note blank). Click "Submit".

Enrollment	History	Provide Services	Assessments	Notes	Files	× Exit
Service	s					
Assistance	obtaining/c	oordinating public ben	efits			Case Management 🗸
Case Mana	gement					Case Management 🗸
Child Care						Child Care 🗸
Motel						Motel and Hotel Vouchers \checkmark
Moving Cos	sts					Moving Cost Assistance 🗸
Other Finan	cial Service					Other 🗸
Outreach						Case Management 🗸
Rental Assi	stance					Rental Assistance 🗸
Security De	posit					Security Deposit 🗸
Transporta	tion					Transportation 🗸
Utilities						Utility Payments 🗸
[RRH CSJ]	Assistance c	btaining/coordinating	public benefits			No Category 🗸
[RRH CSJ]	Case Manag	ement				Case Management 🗸
[RRH CSJ]	Dutreach					Case Management 🗸



Financial Services

- Go to client's program enrollment
- Click on Provide Services tab
- Choose service and fill out information:
 - Fill out Start Date, End Date, and Expense Date as date the assistance was provided
 - Fill out Expense Amount

Enrollment	History Provide	Services Assessment	s Notes File	s Forms		×
Se	rvices					
[RRH CS	J] Child Care					Child Care 🥆
[F	RRH CSJ] PATH					~
1	Start Date:	25	En	d Date:	25	
	Expense Amount:	0.00	Ex	pense Date:	25	
	Funding Source: Service Note B Bold I Itali	No Funding Source	llets			
					SUBM	π



H. Program Exit



Program Exit: Overview

- When a client exits the program, click the Exit button
- Be sure to enter the correct Exit Date (this usually populates to the current date)
- 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)?"
- If client is housed elsewhere, select the option from drop down list



Program Exit: Step-by-Step

	PROGRAM: [RRH CS.] PATH
KING CAKE	
	Enrollment History Provide Services Assessments Notes Files Forms
PROGRAM: [RRH CSJ] PATH	End Program for client King Cake
	Project Exit Date 05/26/2021
	Destination Select V
Enrollment History Provide Services Assessments Notes Files Forms × Exit	is the client standarding to a difference project of the same project type?
	Is the Program Type a Permanent Housing Yes (Automatically Generated Response) Yougins Type?
	Did the client stay in the
On the right side of the programs tab bar, click Exit	(Transition in place)
	Disabiling conditions and Barriers Update all Information
	Physical Disability No Y On the exit screen
	Developmental Disability No Vote changes in income
	Chronic Health Condition No Y
	Mental Health Problem No V
Sally Mander Mother	Substance Abuse Problem No V
	MONTHLY INCOME AND SOURCES
Char Mander Son	Income from Any Source No V
End Program	Receiving Non-Cash
	Benefits <u>NO Ý</u>
	HEALTH INSURANCE
	Covered by Health No V
Check all the nousehold members who are exiting and click End Program	IMPORTANT REMINDER: ENTER 'HOUSING MOVE-IN DATE' ON ENROLLMENT SCREEN WHEN CLIENT MOVES INTO PERMANENT HOUSING.
CIICK LIIU FIOYIAIII	



Questions, Comments, Concerns?

Please contact: sccsupport@bitfocus.com