



RRH Workflow Training



The RRH Workflow Process

- A. [Managing Referrals](#)
- B. [Documenting Outreach Attempts](#)
- C. [Program Enrollment](#)
- D. [Status Assessment](#)
- E. [Annual Assessment](#)
- F. [SPDAT](#)
- G. [Provide Services](#)
- H. [Program Exit](#)

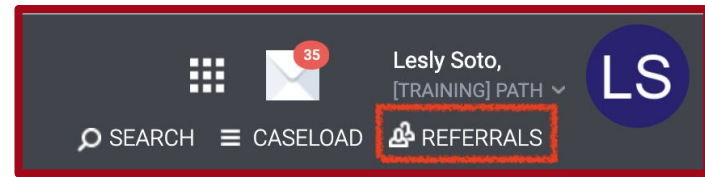
A. Managing Referrals



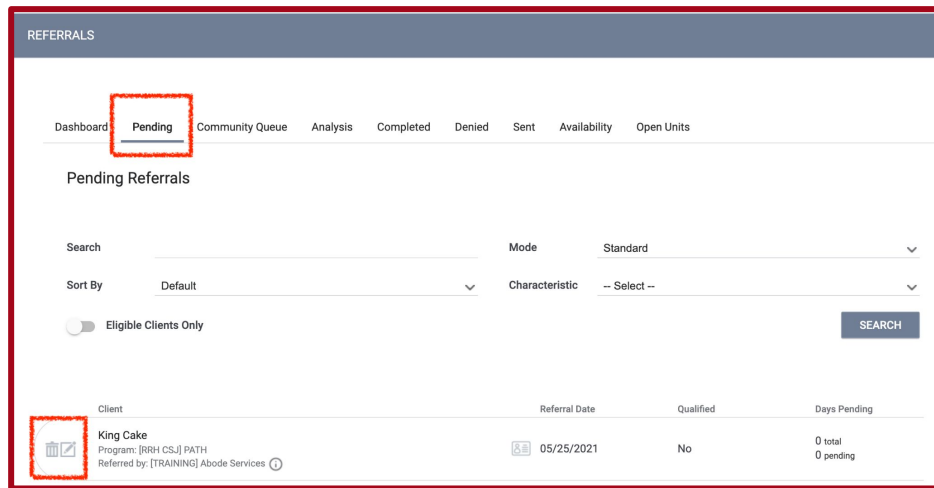
Managing Referrals - Overview

- 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
3. From the options available select the **Pending** tab - this will populate any pending referrals
4. 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



Editing the Referral

1. Assign a **Case Manager** if there is one - *this is optional*
2. 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	No
Referred by Staff	Lesly Soto ⓘ
Case Manager	Select ▼
Last Activity	05/25/2021
Status	<div>✓ Pending Pending - In Process Denied Expired</div>
Private	

CHECK-IN

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
- ☒ **Assigned Staff** - 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.

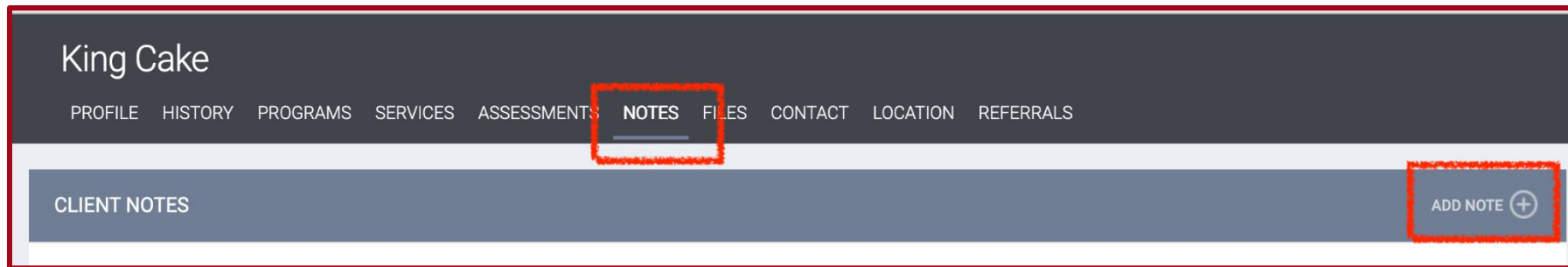
Document your attempts to contact clients in the Notes and/or Services Tabs

- 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



King Cake

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

CLIENT NOTES

ADD NOTE +

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 PROGRAMS **SERVICES** ASSESSMENTS NOTES FILES CONTACT LOCATION

SERVICES

Security Deposit

[HP Financial] Housing Industry Foundation (HIF)

[HP Financial] Housing Trust

[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

[RRH Referral] Outreach Case Management

Locate client with a RRH referral

Start Date: 05/26/2021

End Date: 05/26/2021

Time Tracking: None None

Include group members:
☐ Alex Rodriguez
☐ Private Test Private

Service Note :

B I L R

DO NOT ENTER NOTE HERE.

SUBMIT

Start/End Date should be the same date -
the date you attempted to locate the client

[SSVF] Outreach services This is the service you will use for SSVF referrals

VA SSVF Service

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 CS.J] 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 ▼
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

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

Select the
Profile Tab for
the Client

King Cake

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

CLIENT PROFILE

Next select
the Shield
Icon to view
ROI for client

Household Members

Review the ROI
permissions
Follow clients ROI
when entering
HMIS Data

Verify Dates
are still
relevant

Check
Permission

RELEASE OF INFORMATION					RELEASE OF INFORMATION (+)
Permission	Type	Start Date	End Date	Version	
Yes	Electronic Signature	03/25/2020	03/25/2023	V.1	
[TRAINING] Jobtrain CA-500					

Program Enrollment: Step by Step

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
[HPS - DH] SHCS Prevention Program Homeless Prevention [TRAINING] Sacred Heart Community Serv	04/28/2021	Active	Individual

This is a list of programs the client can be enrolled in

PROGRAMS: AVAILABLE

Minimal Street Outreach	Street Outreach ▼
SOAR	Street Outreach ▼
Street Outreach	Street Outreach ▼
[RRH CSJ] PATH	PH - Rapid Re-Housing ▼
[TBRA Pre-Housing] Case Management	Street Outreach ▼

To enroll a client/household into a program, select the down arrow next to the applicable program under PROGRAMS: AVAILABLE

Make sure the "Program Placement a result of Referral" is checked

Program Placement a result of Referral provided by 21904

Include group members:

☐ Alex Rodriguez

☐ Private Test Private

ENROLL


Select Enroll

Make sure all household members that are enrolling into the program are checked

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

Housing Move-In Date



Only Add date is client is housed.

D. Annual Assessment

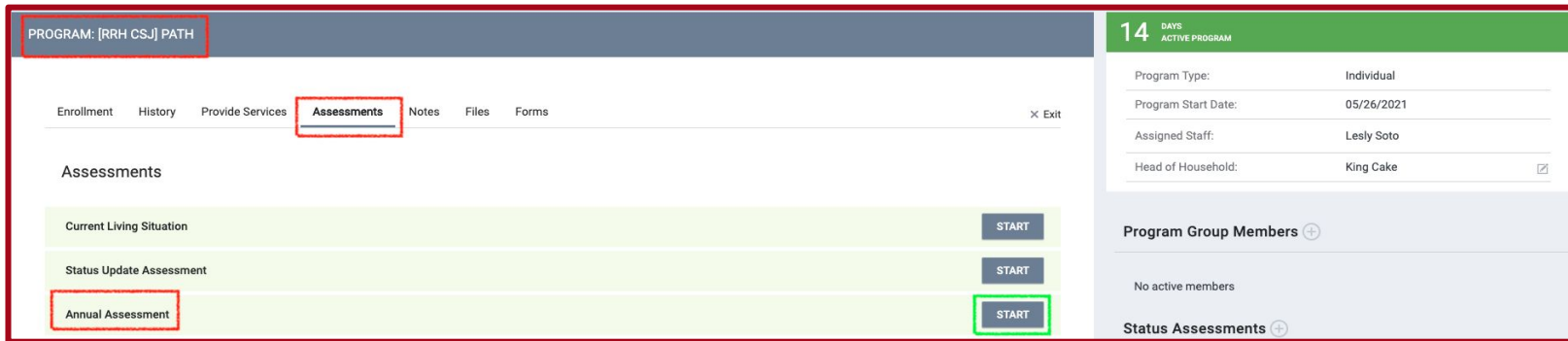
Annual Assessment: Overview

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

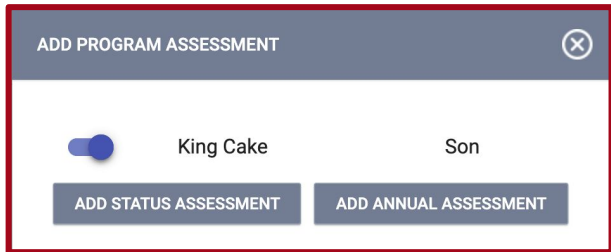
Annual Assessment: Step by Step

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.



The screenshot shows the client's program enrollment page. The top bar displays "PROGRAM: [RRH CSJ] PATH". The main navigation tabs include Enrollment, History, Provide Services, **Assessments** (highlighted with a red box), Notes, Files, and Forms. The Assessments section lists three options: Current Living Situation, Status Update Assessment, and **Annual Assessment** (highlighted with a red box). Each option has a corresponding "START" button, with the "START" button for the Annual Assessment highlighted with a green box. On the right side, a sidebar shows "14 DAYS ACTIVE PROGRAM" and details for the program type (Individual), start date (05/26/2021), assigned staff (Lesly Soto), and head of household (King Cake). Below this, there are sections for "Program Group Members" (No active members) and "Status Assessments".

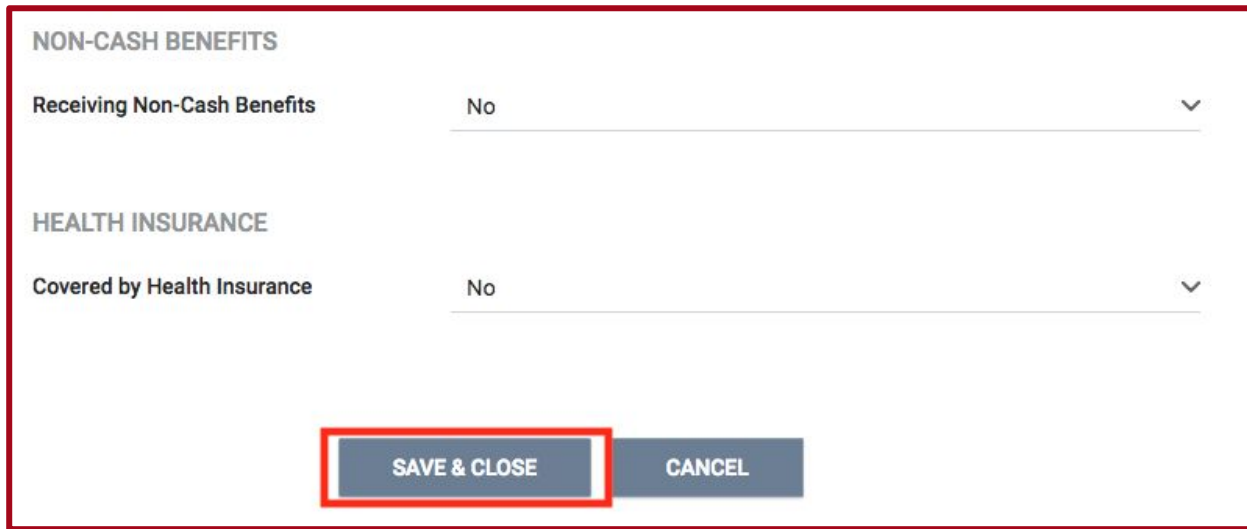
Check all the household members for whom you will complete an Annual Assessment (within 30 days of the HoH's program start date anniversary).



The screenshot shows a dialog box titled "ADD PROGRAM ASSESSMENT" with a close button (X). Inside the dialog, there is a toggle switch for "King Cake" which is currently turned on. Below the toggle, there are two buttons: "ADD STATUS ASSESSMENT" and "ADD ANNUAL ASSESSMENT".

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.



NON-CASH BENEFITS

Receiving Non-Cash Benefits No

HEALTH INSURANCE

Covered by Health Insurance No

SAVE & CLOSE **CANCEL**

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.

PROGRAM: [RRH CSJ] PATH

Enrollment

History

Provide Services

Assessments

Notes

Files

Forms

× Exit

Program Service History

LINK FROM HISTORY

Service Name	Start Date	End Date
Referral: [RRH CSJ] PATH [TRAINING] Abode Services referral to [TRAINING] PATH	05/26/2021	05/26/2021
Referral: [RRH CSJ] PATH [TRAINING] Abode Services referral to [TRAINING] PATH	05/25/2021	05/25/2021

0 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 05/26/2021

Assigned Staff: Lesly Soto

Head of Household: King Cake

Program Group Members

No active members

Status Assessments

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).

ADD PROGRAM ASSESSMENT

King Cake


Son


ADD STATUS ASSESSMENT

ADD ANNUAL ASSESSMENT

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.

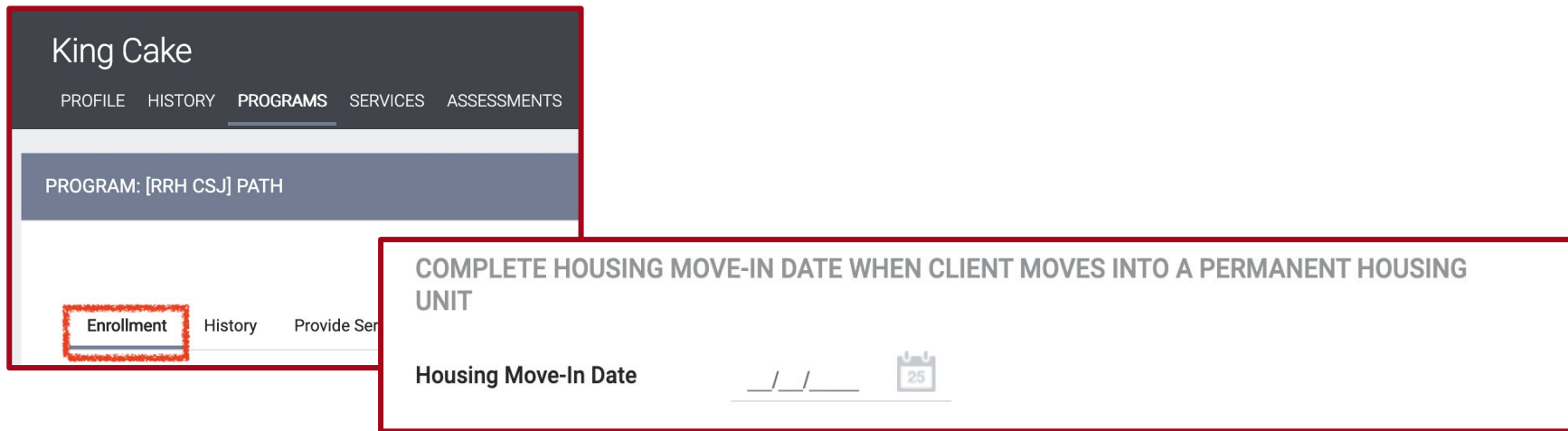
NON-CASH BENEFITS
Receiving Non-Cash Benefits No 

HEALTH INSURANCE
Covered by Health Insurance No 

SAVE & CLOSE **CANCEL**

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.



The screenshot displays the client profile for "King Cake". The top navigation bar includes "PROFILE", "HISTORY", "PROGRAMS", "SERVICES", and "ASSESSMENTS", with "PROGRAMS" currently selected. Below this, the program is identified as "[RRH CSJ] PATH". A red box highlights the "Enrollment" tab in the bottom navigation bar, which is also outlined with a red dashed border. To the right of the "Enrollment" tab, the text "History" and "Provide Ser" are partially visible. A large red-bordered callout box is overlaid on the right side of the screen, containing the instruction: "COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT". Below this instruction, the "Housing Move-In Date" field is shown with a date input format of __/__/__ and a calendar icon displaying the number 25.

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

King Cake

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES PAPER CONTACT LOCATION REFERRALS

PROGRAM: [RRH CSJ] PATH

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

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
SPDAT for Individuals [v5.2] (Labels)	START

Be sure to be in the **PROGRAMS** Tab and select the appropriate program

Select the **Assessments** Tab - this populate a list of Assessments

Select the appropriate one for your client


Complete the assessment and save

SPDAT for Families	START
SPDAT for Individuals [v5.2] (Labels)	START
SPDAT for Youth [v5.2] (Labels)	START

ASSESSMENT HISTORY

Advanced Search Options View ▾

To see the score return to the assessment history tab

Assessment Name	Completed	Details
 SPDAT for Individuals [v5.2] (Labels) [TRAINING] PATH ⓘ	05/26/2021	SPDAT V5.2-IND : 42

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)
 - Fill out Start Date, End Date, and Expense Date as date the assistance was provided
 - Fill out Expense Amount
 - If an “Other” funding source or type of assistance was provided, specify what type in the Notes section

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 Cake

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

PROGRAM: [RRH CSJ] PATH

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

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

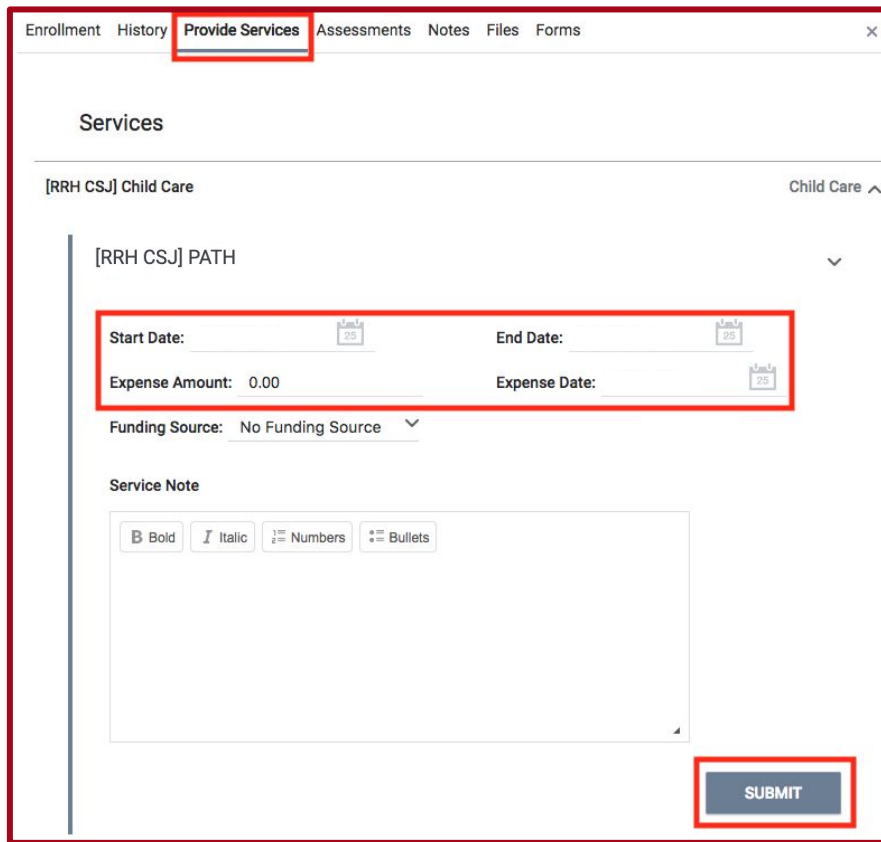
Services

Assistance obtaining/coordinating public benefits	Case Management ▼
Case Management	Case Management ▼
Child Care	Child Care ▼
Motel	Motel and Hotel Vouchers ▼
Moving Costs	Moving Cost Assistance ▼
Other Financial Service	Other ▼
Outreach	Case Management ▼
Rental Assistance	Rental Assistance ▼
Security Deposit	Security Deposit ▼
Transportation	Transportation ▼
Utilities	Utility Payments ▼
[RRH CSJ] Assistance obtaining/coordinating public benefits	No Category ▼
[RRH CSJ] Case Management	Case Management ▼
[RRH CSJ] Outreach	Case Management ▼

- 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".

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** Assessments Notes Files Forms

Services

[RRH CSJ] Child Care Child Care ^

[RRH CSJ] PATH ^

Start Date: End Date:

Expense Amount: 0.00 Expense Date:

Funding Source: No Funding Source ^

Service Note

B Bold I Italic 1= Numbers * = Bullets

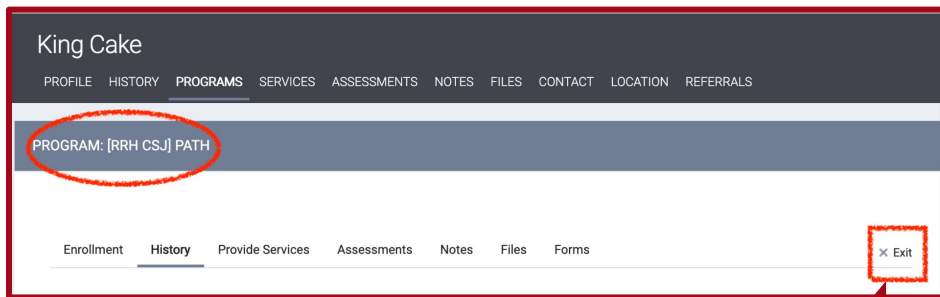
SUBMIT

H. Program Exit

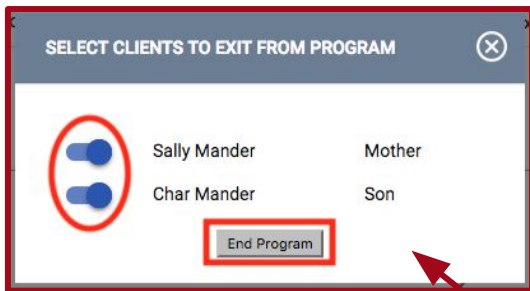
Program Exit: Overview

- 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

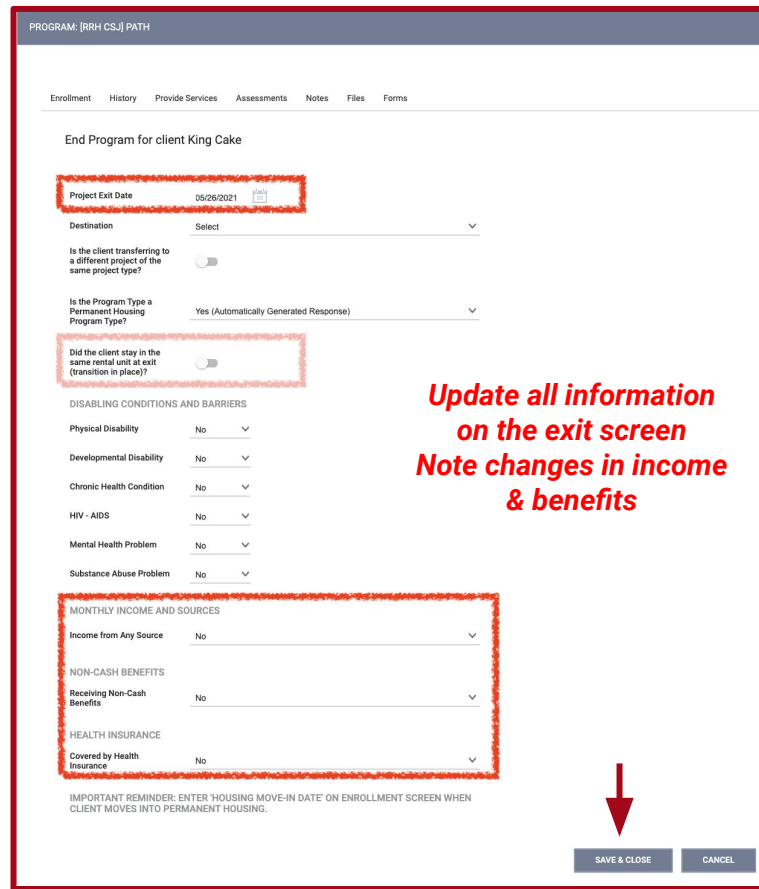
Program Exit: Step-by-Step



On the right side of the programs tab bar, click Exit



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



Update all information on the exit screen
Note changes in income & benefits

Questions, Comments, Concerns?

Please contact: sccsupport@bitfocus.com
