RRH Workflow Training

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The RRH Workflow Process

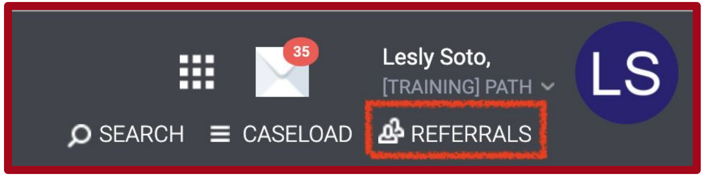
A. Managing Referrals

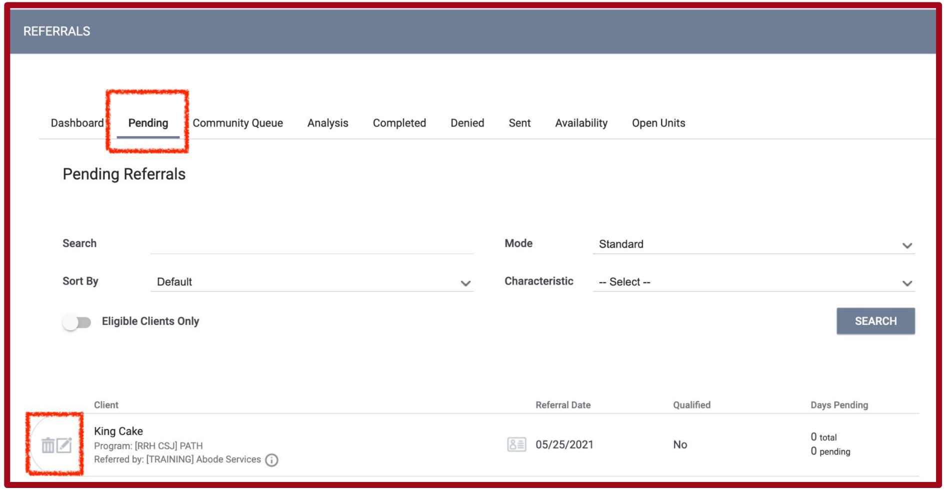
Managing Referrals - Overview

- 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





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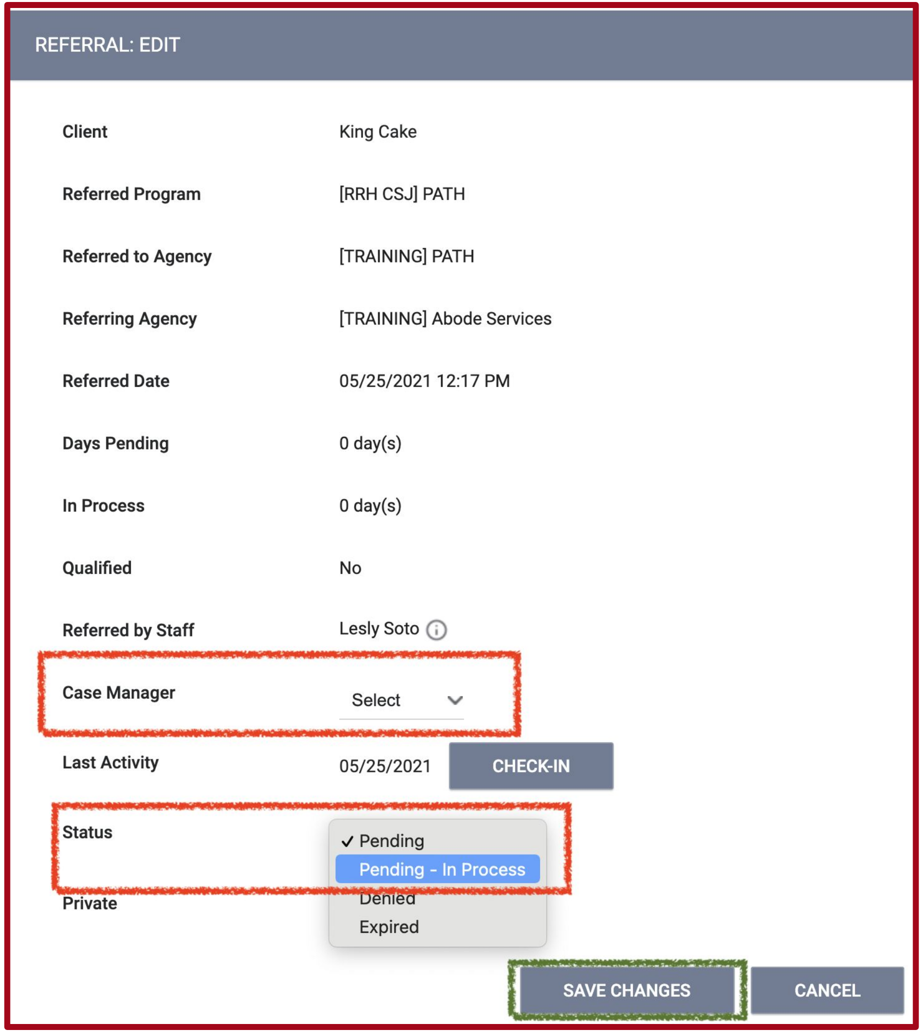
Editing the Referral

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



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.

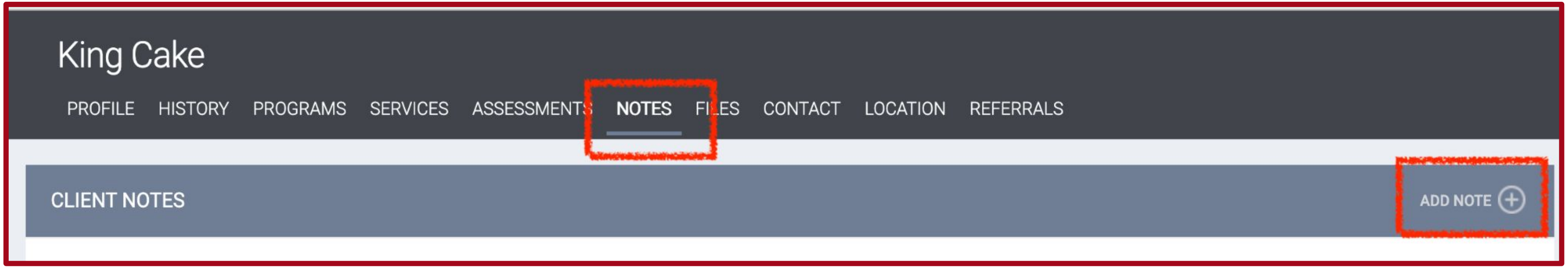
Document your attempts to contact clients in the Notes and/or Services Tabs

- 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



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***

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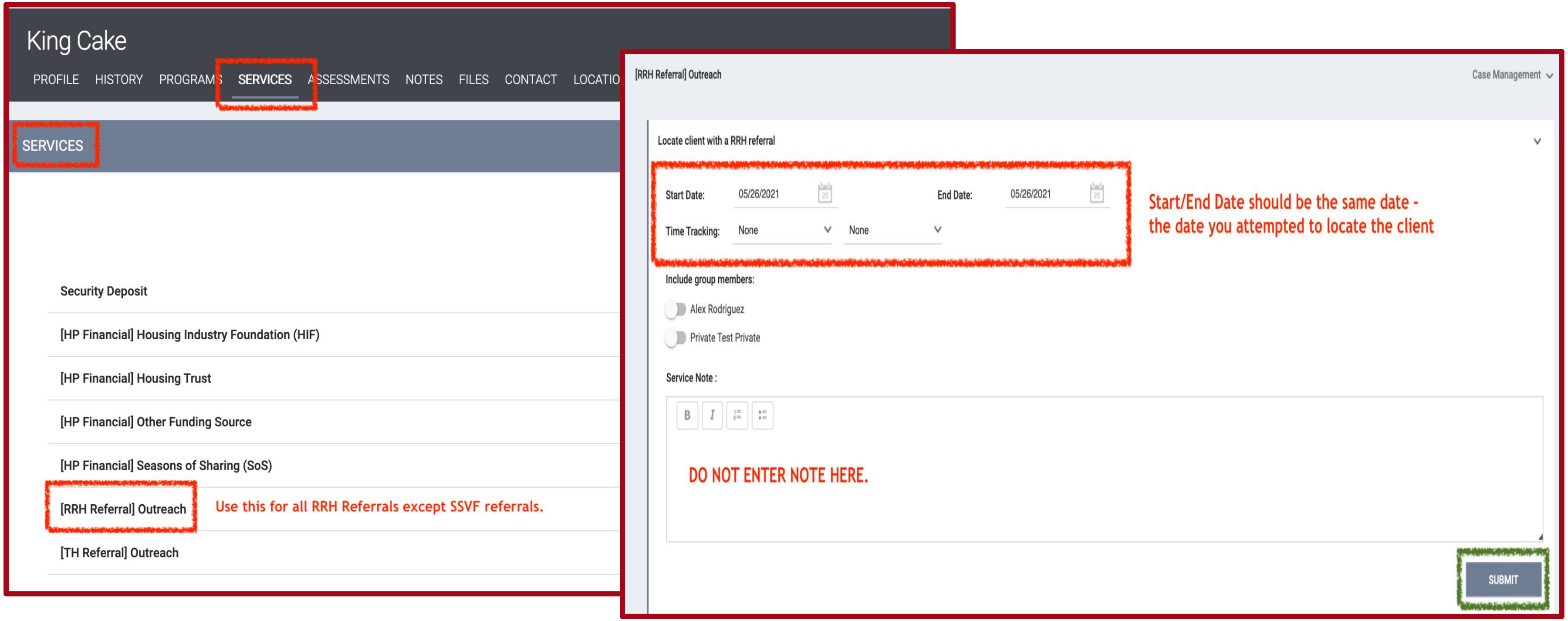
Document Attempts to Contact Client - *Outreach Service*



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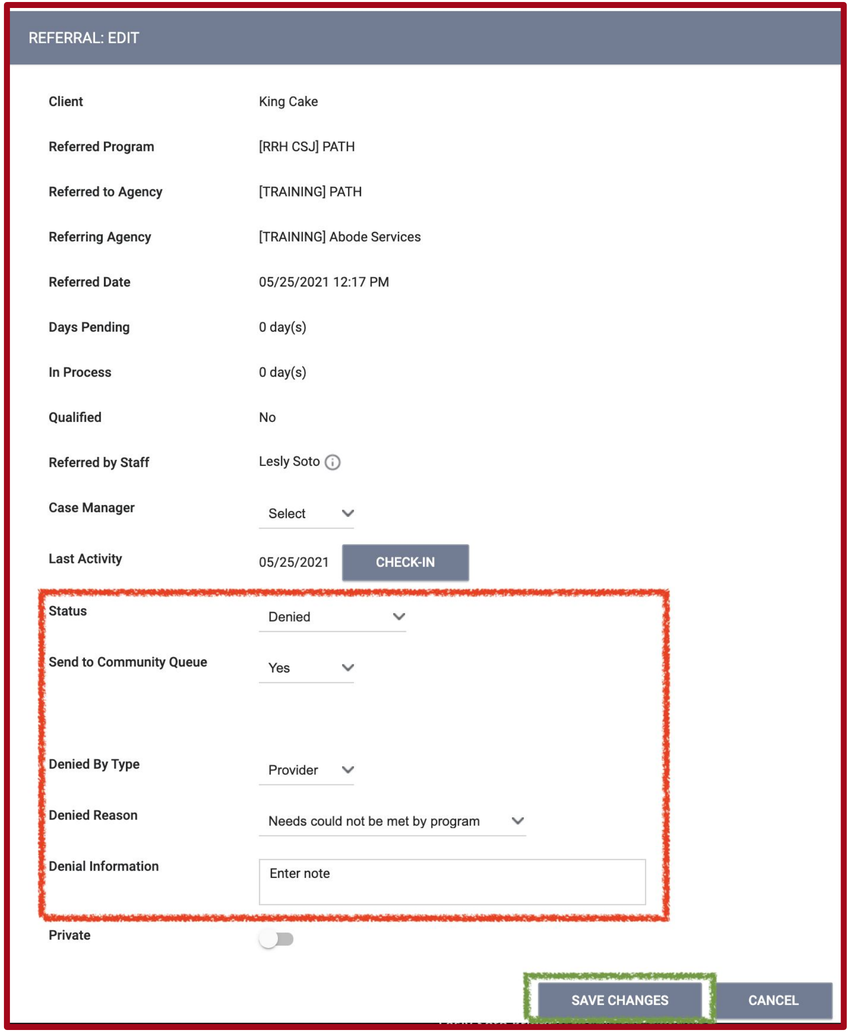
Denying a Referral

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



C. Program Enrollment

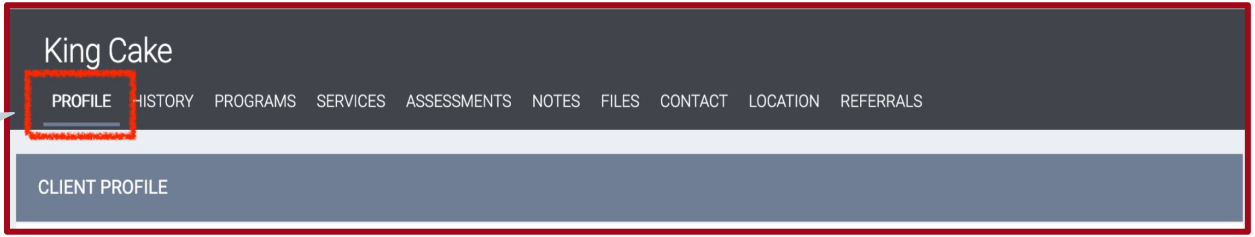
Program Enrollment: Overview

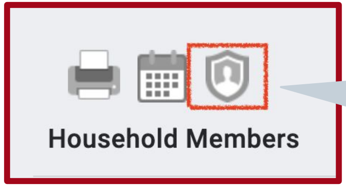
Accept a referral by enrolling the client into the program

- 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





Next select the Shield Icon to view ROI for client

Review the ROI permissions Follow clients ROI when entering HMIS Data

Verify Dates are still relevant

Check Permission

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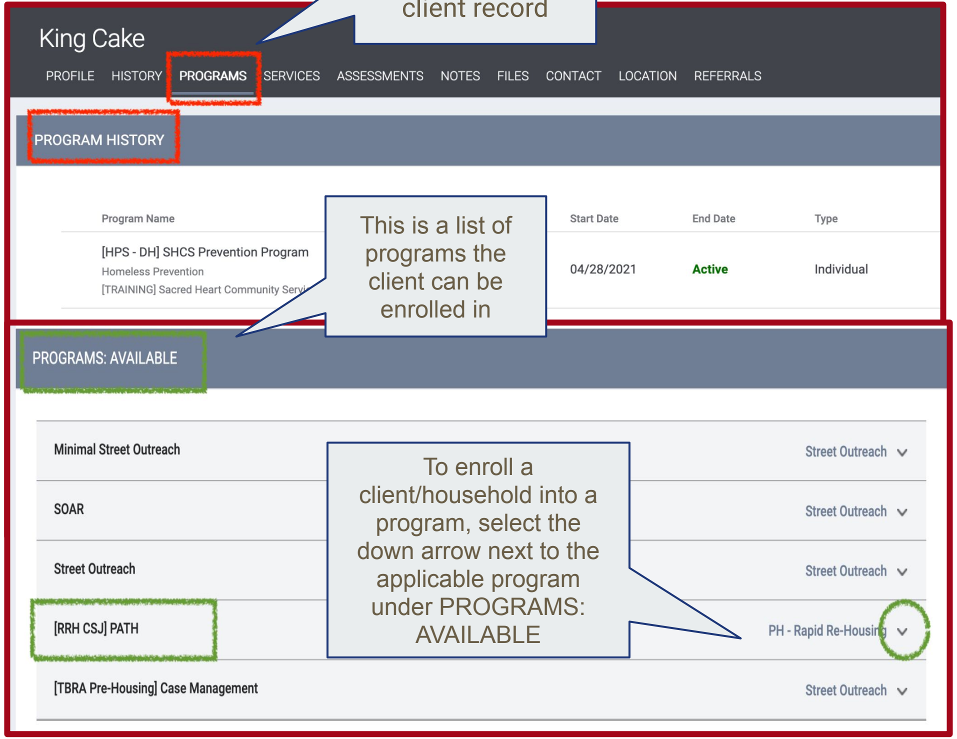
Program Enrollment: Step by Step

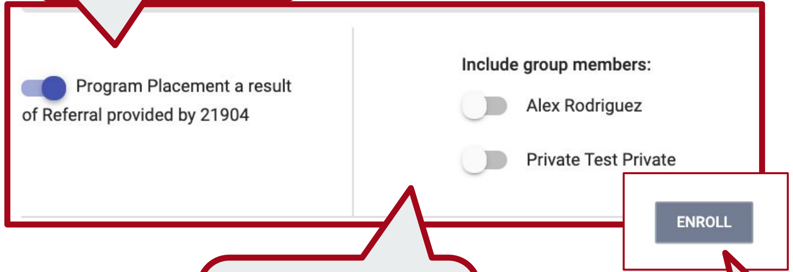
Click on the Programs tab at the top of the client record



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

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



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

Select Enroll

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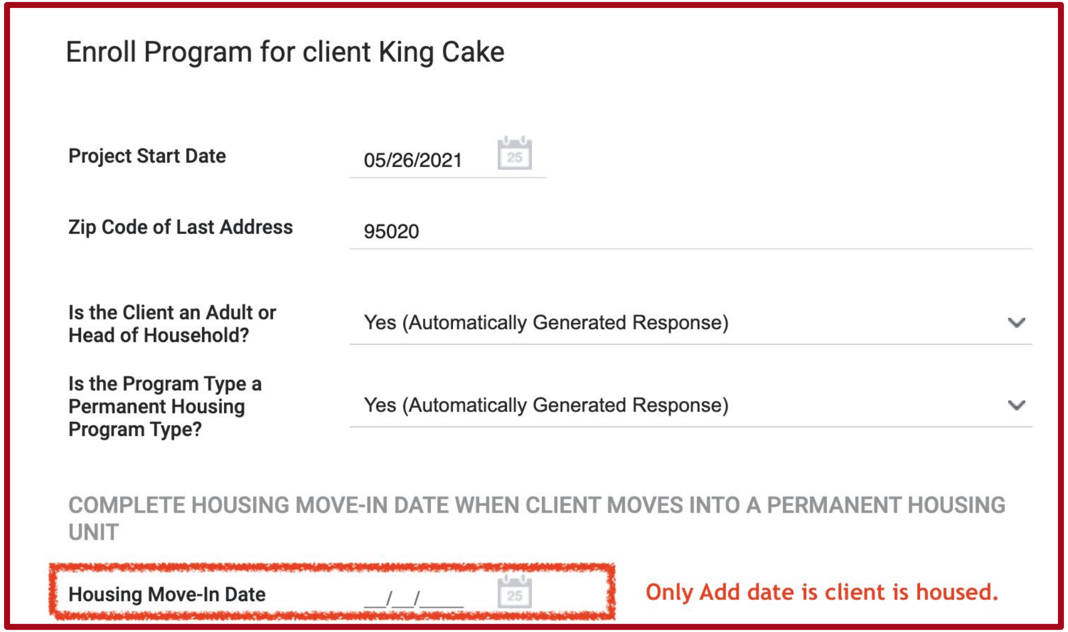
Program Enrollment: Step by Step

- 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

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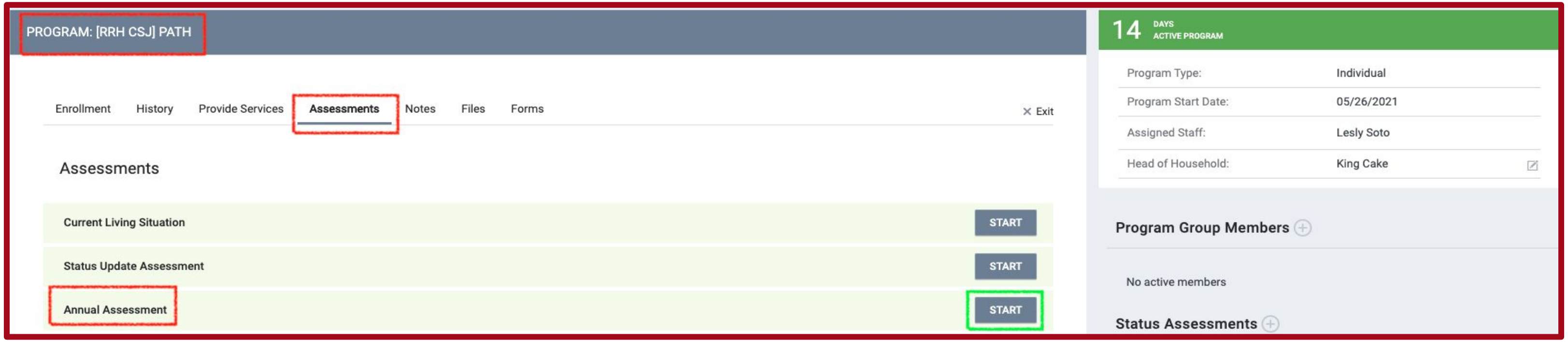
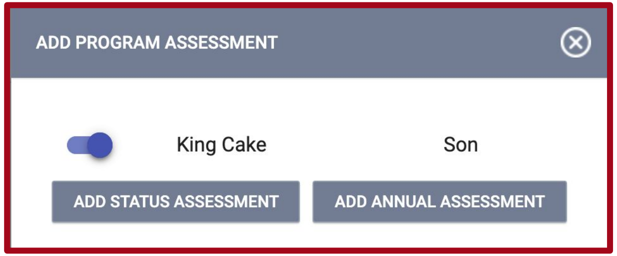
Annual Assessment: Step by Step

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.

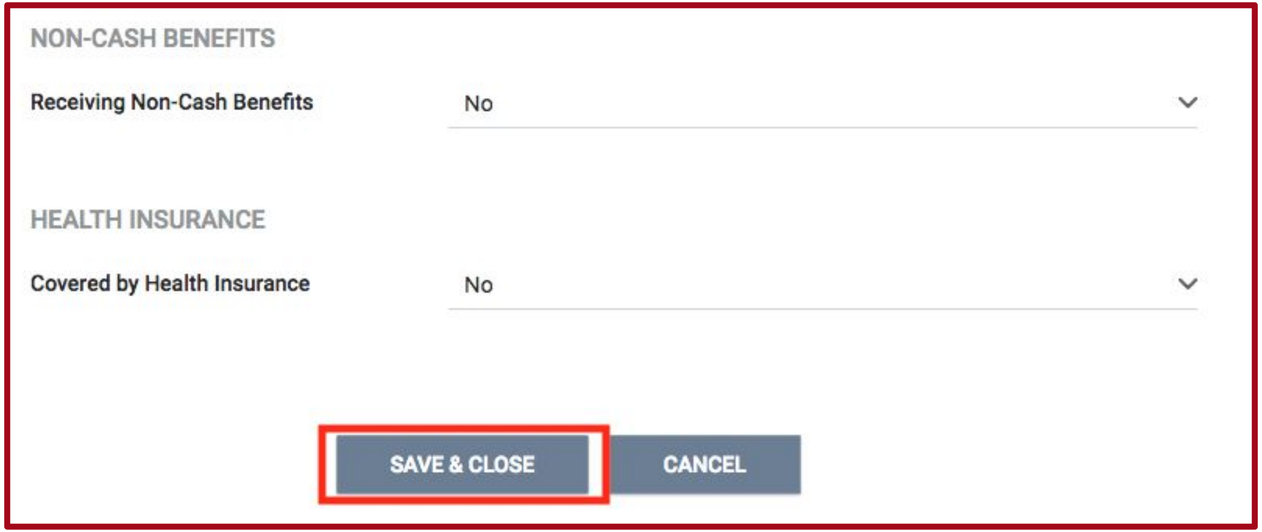


Check all the household members for whom you will complete an Annual Assessment (within 30 days of the HoH's program start date anniversary).



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.

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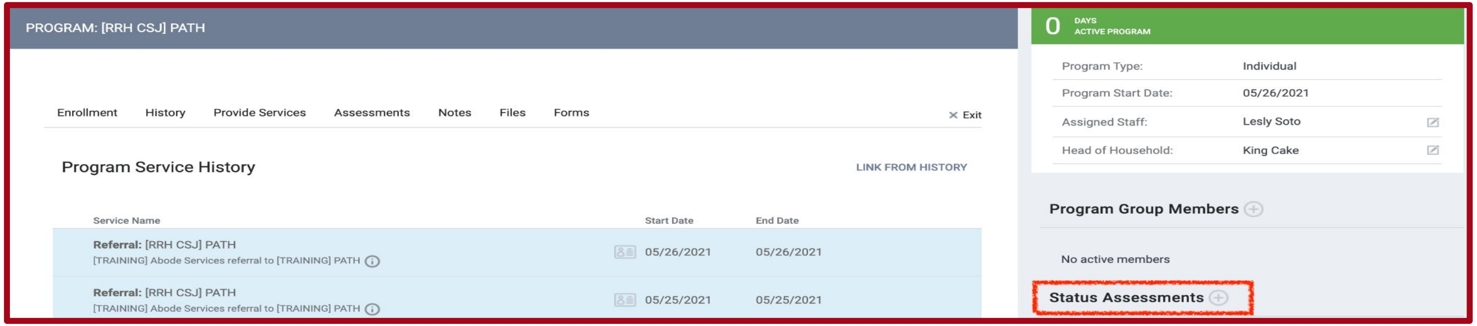
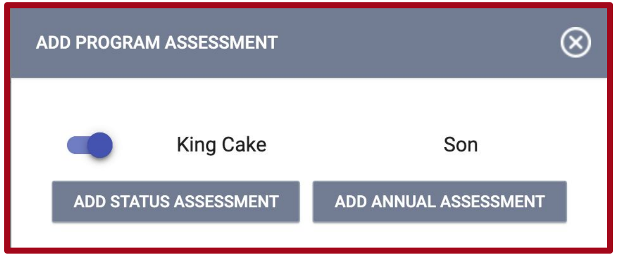
Status Assessment: Step by Step

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

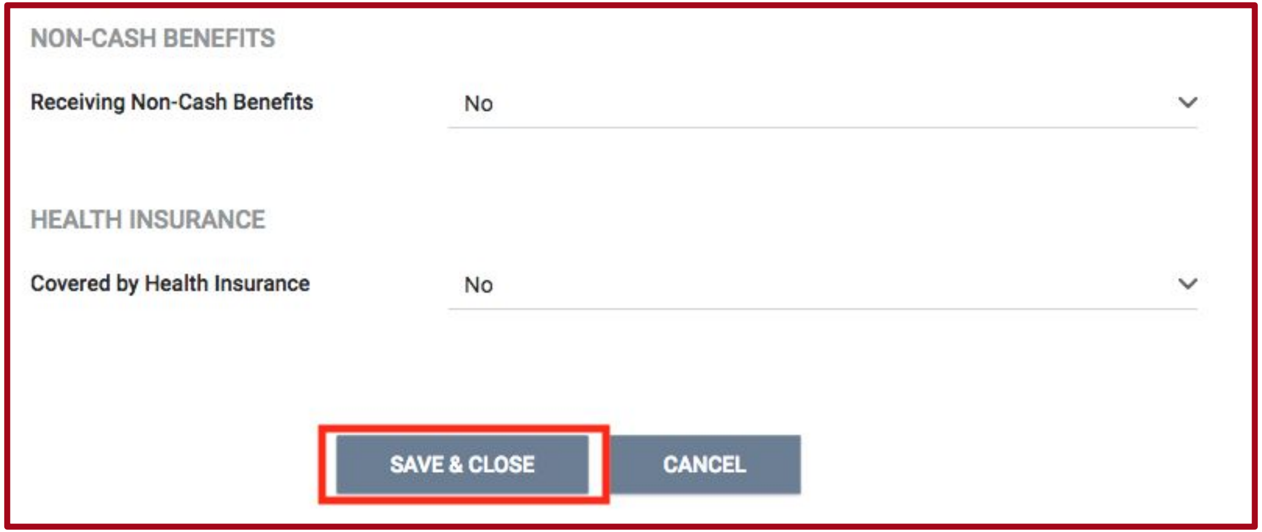


Check all the household members you want to update and choose either Status Assessment (for general changes) or Annual Assessment (within 30 days of the HoH's program start date anniversary).



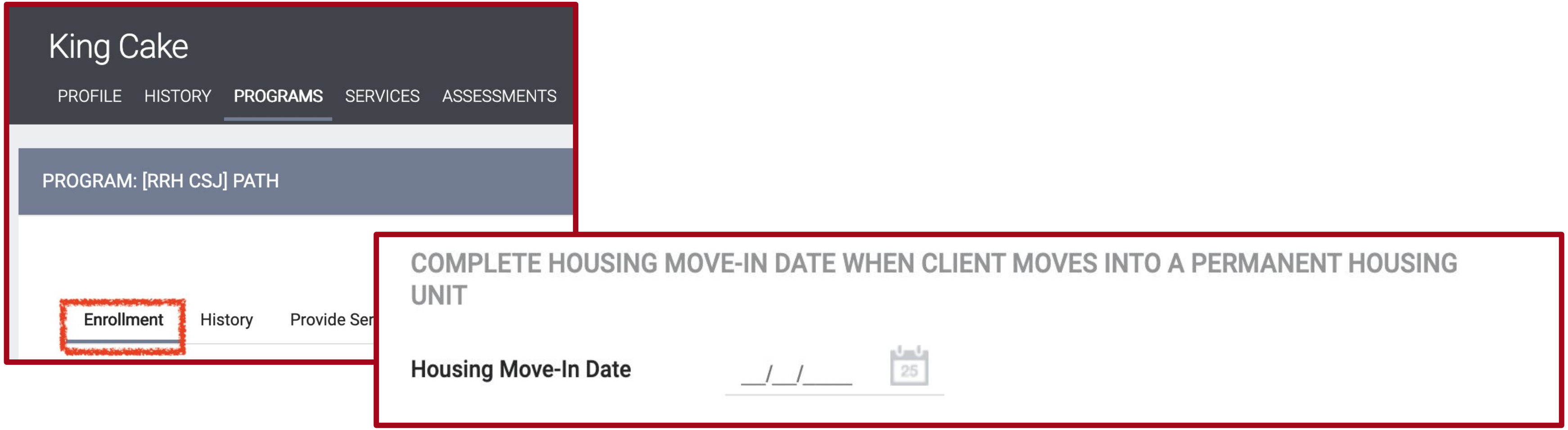
Status Assessment: Step by Step

- 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.



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

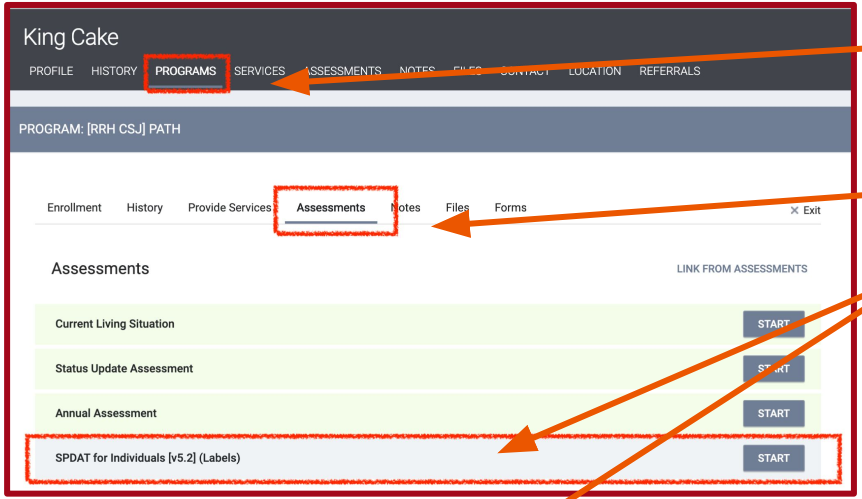
Finding and Recording the SPDAT

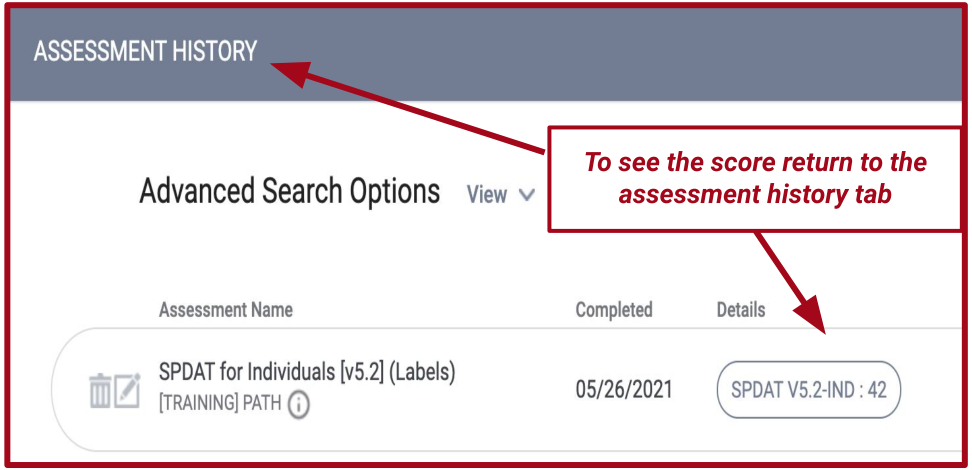
Be sure to be in the **PROGRAMS** Tab and select the appropriate program

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

Select the appropriate one for your client

Complete the assessment and save





To see the score return to the assessment history tab

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

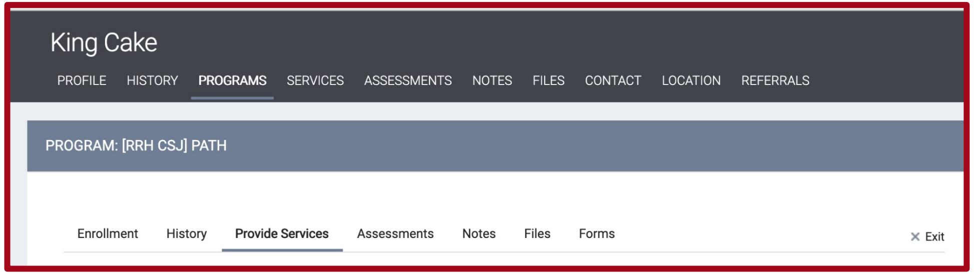
Rental assistance
Utility fee payment assistance
Utility deposit
Security deposit
Moving costs
Transportation services: tokens/vouchers
Transportation services: vehicle repair/maintenance
Child Care
Motel
Other

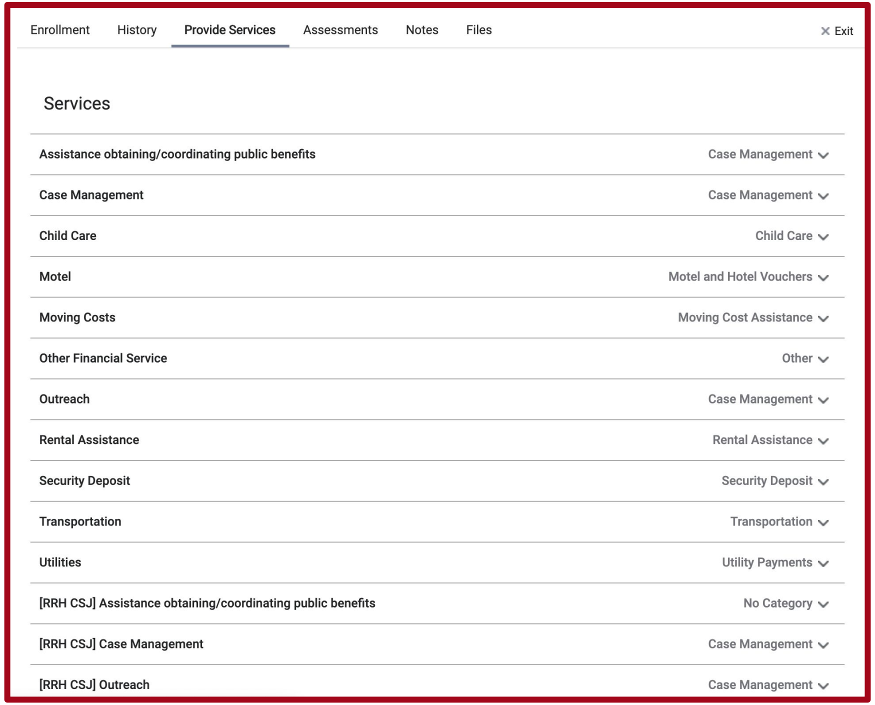
Supportive Services

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

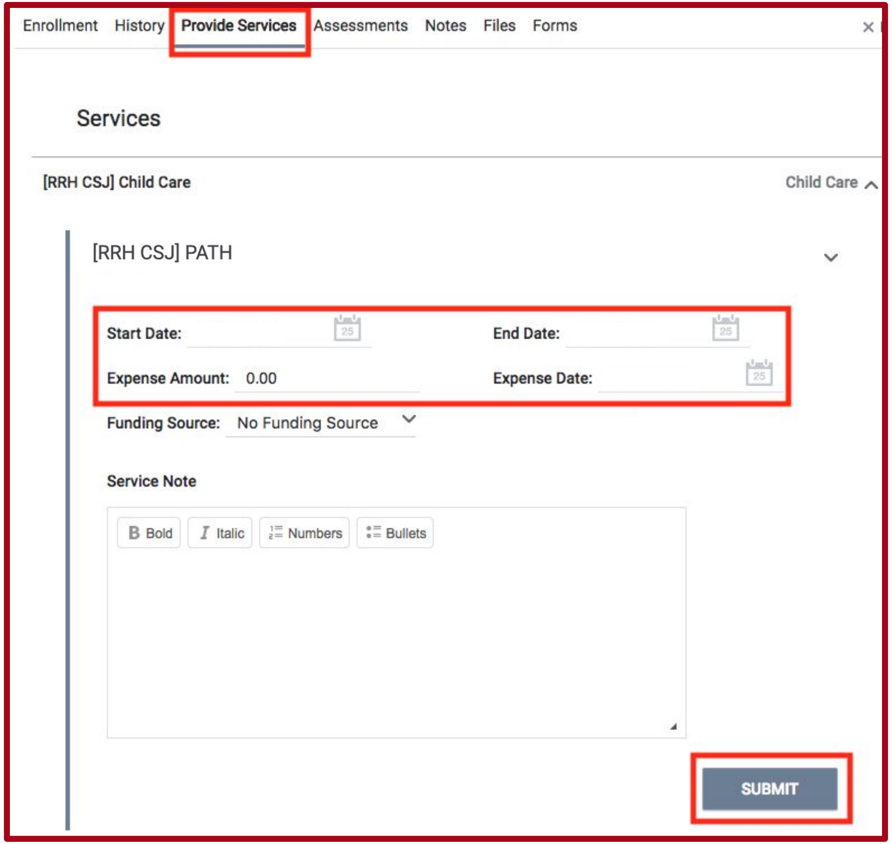




- Go to client's program enrollment
- Click on **Provide Services** tab
- Choose service and fill out information (Service Notes are **not** required and are visible to all HMIS users. When in doubt, leave the Service Note blank). Click "Submit".

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



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

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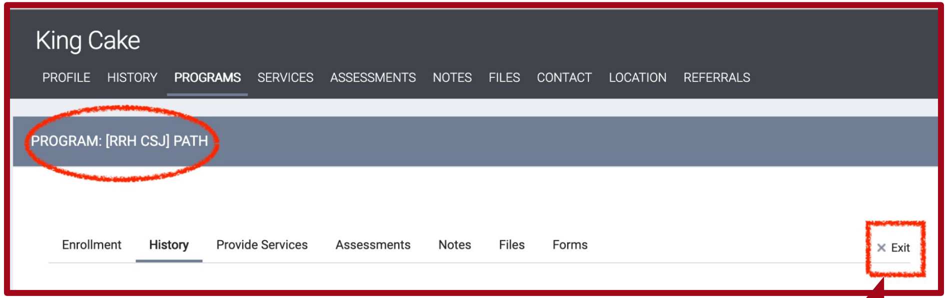
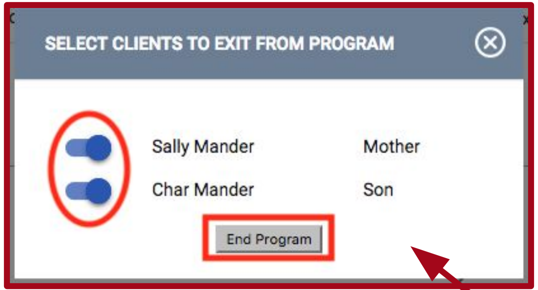
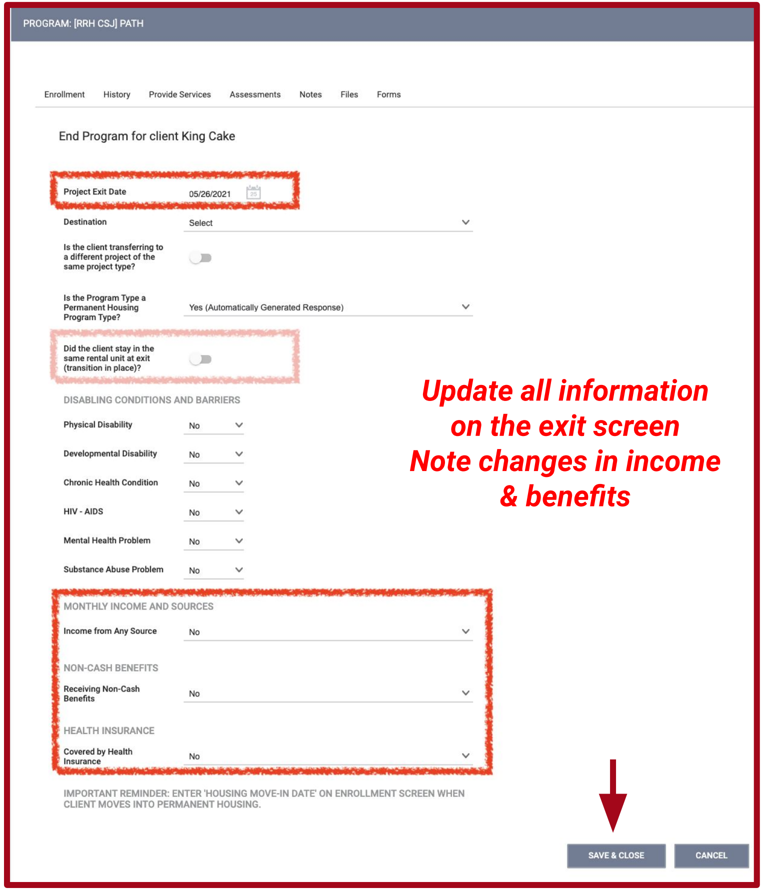
Program Exit: Step-by-Step



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