



Sonoma County: Housed Programs

ETO VIRTUAL INTERACTIVE LAB

Welcome!

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Agenda

ENROLLMENT

HOUSEHOLD

HUD ENTRY ASSESSMENT

HUD EXIT ASSESSMENT/PROGRAM DISMISSAL

OFFICE HOURS



Learning Objective

To provide an overview of Housed Programs within HMIS.

Enrollment



Enrollment

Before you add a participant in ETO, always search to ensure they do not already have a record.



Enrollment

Searching for Participants

Searching is a two step process

- Quick Search
- Enterprise Enroll



Enrollment

Quick Search

- The Quick Search is used to look for Participants who are already enrolled in the program.
- A blank quick search will return ALL of the participants currently enrolled in the program

The screenshot shows a software interface with a search bar and navigation options. The search bar contains the text "Search Term(s)..." and a magnifying glass icon. To the right of the search bar, there are two dropdown menus: "Within" set to "Participants" and "In" set to "Sono - COTS, ES MIC - Singles". A green "SEARCH" button is located to the right of the second dropdown menu. Above the search bar, there is a header area with the text "COTS Sono - COTS, ES MIC - Singles" and three icons: "CHANGE" (pencil), "REPORTING" (bar chart), and "MESSAGES" (envelope). To the right of these icons is a profile icon and the text "Enterprise Manager".



Enrollment

Enterprise Search

Participants > Enroll Participants from other COTS pgm

- Search for participants that are in the enterprise, but are not currently enrolled in the program.

Enroll Participants into Sono - COTS, ES MIC - Singles

Search for Participants in COTS by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.
1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enrollment information; if multiple participants are selected with different dates, finish on the following page.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:



Enrollment

Enrolling Participants

New Participants

Add New Participant > fill in HUD
Demographics > enroll for correct
date

The screenshot shows a web form with two main sections: 'Program Enrollment' and 'Add New Participant'. A red arrow points to the 'Enroll in Program' checkbox, which is checked. Below it is the 'Program Start Date' field with a calendar icon. The 'Add New Participant' section contains various input fields and dropdown menus for demographic information, including Case Number, First Name, Middle Name, Last Name, Suffix, Sono - Participant Nickname, Name Data Quality (HUD), SSN, SSN Quality (HUD), DOB, DOB Quality (HUD), Gender (HUD), Other Gender (HUD), Race (HUD) with multiple checkboxes, Ethnicity (HUD), Alert, and Veteran Status (HUD).

BEST PRACTICE TIP



Any custom demographics ending with (HUD) needs to be completed for ALL HMIS participants.

Enrollment

Enrolling Participants

Participants in other Programs

Search Participant > Set Program
Start Date > click “Enroll
Participant” > Update Necessary
Demographics

Kelli Alberts's Dashboard

Search Participants (This Site)

Search Participants (This Site)

Dashboard Search:

Recent TouchPoints [1]

Kelli Alberts's Recent Sono - Upload Scanned Participant Documents

There are no recent TouchPoints for this participant.

Household Info (Must have at least 1)

Household Info (Must have at least 1)

Kelli Alberts Family
Kelli Alberts Self/Head of Household **Head of Household**

[Family Program History](#)
[Family Composition History](#)

Participant Information

Kelli Alberts

CaseNumber: 37120
Suffix:
FirstName: Kelli
LastName: Alberts
DOB: 2/15/1971
Age: 48 years
[View/Edit Demographics](#)



If the participant gets enrolled from a non-HMIS Program the system won't prompt them to go back and check

LIMITATION



Household



Household

A Household is one or more Participants.

A Single Participant is a Household of one and the Head of Household

A Household can also be 2 or more Participants. One member is the Head of Household

Household

Add a Household

- Participants can be added into the system as a household (family)
- This will create a participant record for each member of the family

Add Family

* Indicates Required Field

Family Member

Head of Household: (Only one Head of Household may be selected for this Family)

Relationship: Self (head of household) <

Prefix: --Select--

First Name:

Middle Name:

Last Name:

Suffix: --Select--

Address 1:

Address 2:

Zip Code: -

Email:

Referral Entity: --Select--

Funding Entity: --Select--

SSN: ___-__-____

Case Number:

DOB: ?

Gender: Female Male

Household

Edit Family Information

Make changes to members of a Family, View Family Program and Composition History

Search Term(s)...

Within Participants In Sono - COTS, ES MIC - Singles SEARCH

View/Edit Family: 1 Fake Family

1 Fake Family

[Edit Family Name](#) [Delete Family](#) [Disable Family](#) [View Program History](#) [View Composition History](#)

Family Member	Age	Date of Birth	Relationship	Take Action
No records to display.				

Add New Members to Family: 1 Fake Family [Search for Others...](#) | [Add New Family Member](#)

Household

Edit an Existing Family for adding New Members

Search Term(s)...

Within Participants In Sono - COTS, ES MIC - Singles SEARCH

View/Edit Family: 1 Fake Family

1 Fake Family

Edit Family Name Delete Family Disable Family View Program History View Composition History

Family Member	Age	Date of Birth	Relationship	Take Action
No records to display.				

Add New Members to Family: 1 Fake Family Search for Others... | Add New Family Member

Add Family

* Indicates Required Field

Existing Members

Click to Add Family Member by Family Relationship

- Aunt/Uncle
- Brother
- Child
- Foster Child
- Foster Parent
- Grand Child
- Grandparent
- Legal Guardian
- Non-married Partner
- Other Family
- Parent
- Self/Head of Household
- Sibling
- Sister
- Spouse
- Step Parent
- Self (Head of Household)

* Start Date

Take Action

Delete Row

Save and Create Group Save



Household


Family Dashboard

Search Term(s)...




Within Families In COTS SEARCH

1 Fake Family Family Dashboard

Family Information

 **1 Fake Family Family**

1 Fake Family
Family Program History
Family Composition History


  

Household

Participant Dashboard


Sally Fake's Dashboard

Search Participants (This Site)

 **Search Participants (This Site)**


Dashboard Search:

Recent TouchPoints [1]

 **Sally Fake's Recent Sono - Upload Scanned Participant Documents**


There are no recent TouchPoints for this participant.

Household Info (Must have at least 1)

 **Household Info (Must have at least 1)**


Sally Fake is not a member of any Family.

Participant Information

 **Sally Fake**


CaseNumber: 77442
Suffix:
FirstName: Sally
LastName: Fake
DOB: 2/1/1993
Age: 26 years
[View/Edit Demographics](#)

Quick Actions

 **Quick Actions**

- Batch Upload
- View Marketplace
- Add Service/Assistance
- Review Participant Efforts
- Project History (Site)
- Manage Groups
- Record Efforts
- Review My Efforts
- Record Attendance
- Multiple Participant Efforts
- Create Collection
- Record Touchpoints
- View/Edit Participant TPs
- View General TouchPoints

Project History (Site)

 **Project History (Site)**

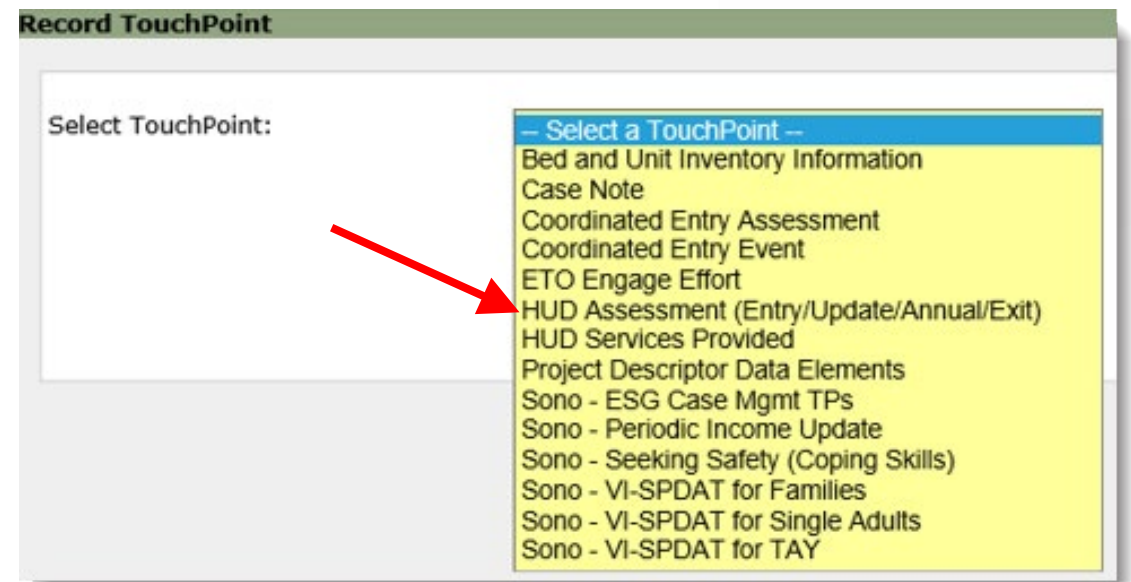
Program Name	Start Date	End Date	Reason for Dismissal
Sono - COTS, ES MIC - Singles	1/30/2020	Pending	

HUD Assessment: Project Entry

HUD Assessment: Project Entry

Recording TouchPoints

- Forms used to track interactions with participants.
- Each program has forms according to the services provided by that program.



Record TouchPoint

Select TouchPoint:

- Select a TouchPoint –
- Bed and Unit Inventory Information
- Case Note
- Coordinated Entry Assessment
- Coordinated Entry Event
- ETO Engage Effort
- HUD Assessment (Entry/Update/Annual/Exit)
- HUD Services Provided
- Project Descriptor Data Elements
- Sono - ESG Case Mgmt TPs
- Sono - Periodic Income Update
- Sono - Seeking Safety (Coping Skills)
- Sono - VI-SPDAT for Families
- Sono - VI-SPDAT for Single Adults
- Sono - VI-SPDAT for TAY



HUD Assessment: Project Entry

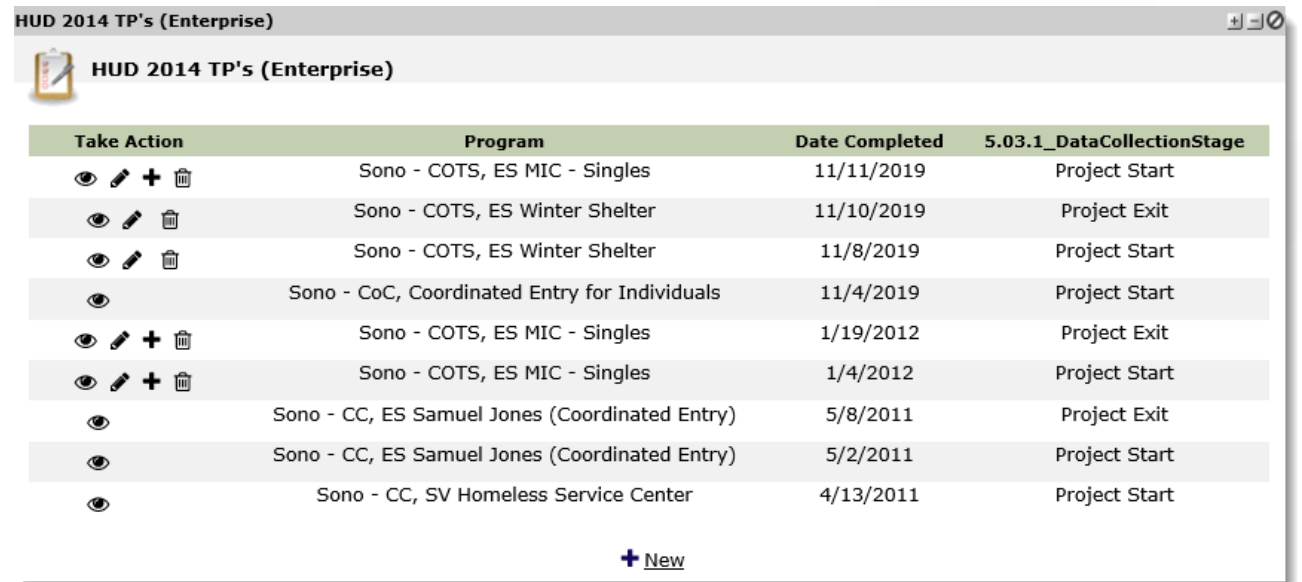
The HUD Assessment collects participant data in order to report to the Department of Housing and Urban Development.

HUD Assessment: Project Entry

Completing a HUD Assessment

The HUD Assessment can be accessed from two places:

- Participant Dashboard > HUD Assessment ETO Part



Take Action	Program	Date Completed	5.03.1_DataCollectionStage
	Sono - COTS, ES MIC - Singles	11/11/2019	Project Start
	Sono - COTS, ES Winter Shelter	11/10/2019	Project Exit
	Sono - COTS, ES Winter Shelter	11/8/2019	Project Start
	Sono - CoC, Coordinated Entry for Individuals	11/4/2019	Project Start
	Sono - COTS, ES MIC - Singles	1/19/2012	Project Exit
	Sono - COTS, ES MIC - Singles	1/4/2012	Project Start
	Sono - CC, ES Samuel Jones (Coordinated Entry)	5/8/2011	Project Exit
	Sono - CC, ES Samuel Jones (Coordinated Entry)	5/2/2011	Project Start
	Sono - CC, SV Homeless Service Center	4/13/2011	Project Start

[+ New](#)



HUD Assessment: Project Entry

The HUD Assessment is organized into four sections:

- Page 1: Universal Information
- Page 5: Income and Benefits
- Page 6: Health Insurance
- Page 7: Health Information

HUD Assessment: Project Entry

There are 4 forms of HUD Assessment:

- Project Start
- Project Update
- Project Annual Assessment
- Project Exit

The screenshot shows a web-based form interface with four tabs at the top: 'PAGE #1. Universal Information' (highlighted in orange), 'PAGE #5. Income and Benefits', 'PAGE #6. Health Insurance', and 'PAGE #7. Health Information'. Below the tabs, the form contains a question 'A-1. At what point is this data being collected?' with a red asterisk. A dropdown menu is open, displaying the following options: '-- Select --', 'Project Start', 'Project Update', 'Project Annual Assessment', and 'Project Exit'. Below this question, there is another question 'A-1. Relationship to the head of household?' with a red asterisk and a dropdown menu showing '-- Select --'.



HUD Assessment: Project Entry

Always take a HUD Assessment

- At **EVERY** Program Enrollment
- HUD Assessment: Project Start must be taken for all Household members
- Every participant in your program must have an HUD Assessment: Project Entry taken
- Only one Project Start Assessment can be taken PER enrollment

HUD Assessment: Project Entry

Page #1: Universal Information

- This page contains basic data elements regarding participant prior and current housing status.
- Depending on the member of the household, you will ask different questions.

HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020

Identifier: HMIS DEMO

PAGE #1. Universal Information PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information

A-1. At what point is this data being collected? *

-- Select --

A-3. What is the client's relationship to the head of household? *

-- Select --

Next Page



Any question on the HUD Assessment that is marked with a red asterisk is required, and the form cannot be saved until the question is answered.





HUD Assessment: Project Entry

Page #1: Universal Information

A-4. Continuum Code - HUD-assigned CoC Codes for this Project's Location

PA-500

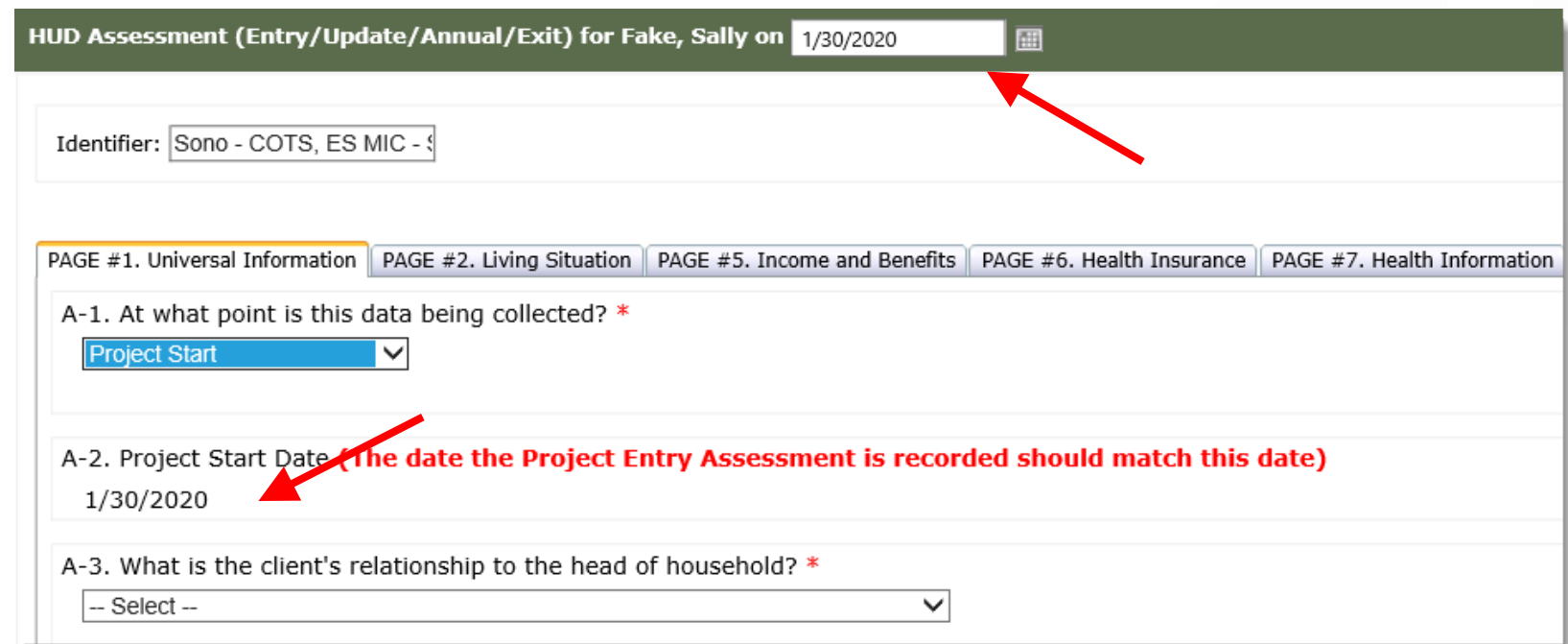
A-5. HUD-assigned CoC code for the client's location (Please enter the CoC code from the question above. If there are multiple CoC codes listed above, please choose the code that links the client to the correct CoC based on the geographic area where the head of household is staying at the time of project entry. If you are unsure please contact your HMIS Administrator) *

PA-500

HUD Assessment: Project Entry

Page #1: Universal Information

Date Taken must Match Project Start Date!



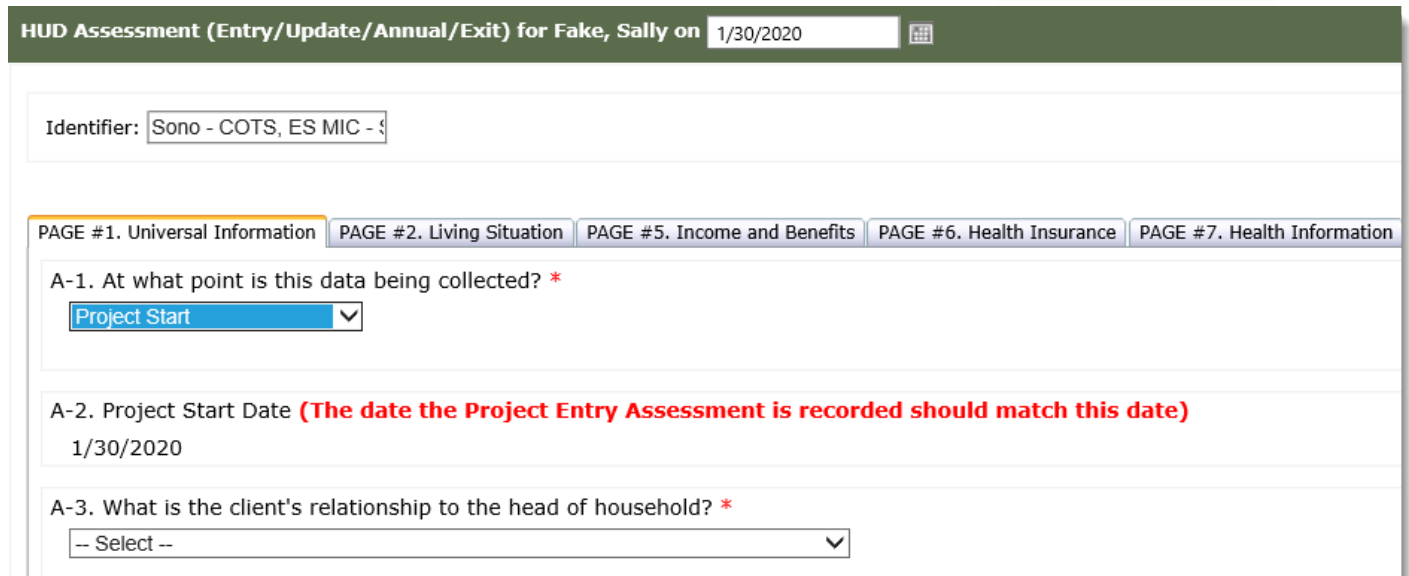
The screenshot displays a web form titled "HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020". The form includes an "Identifier" field with the value "Sono - COTS, ES MIC - \$". Below this are navigation tabs for "PAGE #1. Universal Information", "PAGE #2. Living Situation", "PAGE #5. Income and Benefits", "PAGE #6. Health Insurance", and "PAGE #7. Health Information". The "PAGE #1. Universal Information" tab is active. It contains three sections: "A-1. At what point is this data being collected? *" with a dropdown menu set to "Project Start"; "A-2. Project Start Date (The date the Project Entry Assessment is recorded should match this date)" with the date "1/30/2020" entered; and "A-3. What is the client's relationship to the head of household? *" with a dropdown menu set to "-- Select --". Two red arrows point to the date "1/30/2020" in the top header and the "A-2" field, highlighting that they must match.

HUD Assessment: Project Entry

Page #1: Universal Information

Identifiers

- The identifier populates with the program name that you are currently in.



HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020

Identifier: Sono - COTS, ES MIC - \$

PAGE #1. Universal Information | PAGE #2. Living Situation | PAGE #5. Income and Benefits | PAGE #6. Health Insurance | PAGE #7. Health Information

A-1. At what point is this data being collected? *

Project Start

A-2. Project Start Date (The date the Project Entry Assessment is recorded should match this date)

1/30/2020

A-3. What is the client's relationship to the head of household? *

-- Select --

HUD Assessment: Project Entry

Page 2: Living Situation

HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020

Identifier: Sono - COTS, ES MIC - \$

PAGE #1. Universal Information | PAGE #2. Living Situation | PAGE #5. Income and Benefits | PAGE #6. Health Insurance | PAGE #7. Health Information

A-54. What was the client's residence prior to project entry? *

-- Select --

A-56. Length of Stay in the Prior Living Situation *

-- Select --

HUD Assessment: Project Entry

Page 2: Living Situation

Identifier:

PAGE #1. Universal Information | PAGE #2. Living Situation | PAGE #5. Income and Benefits | PAGE #6. Health Insurance | PAGE #7. Health Information

A-55. What was the client's residence prior to project entry? *

A-57. Length of Stay in the Prior Living Situation *

The key concepts to help determine the actual or approximate start date are:

1. Have the client look back to the date of the last time the client had a place to sleep that was not on the streets, ES, or SH.
2. As the client looks back, there may be breaks in their stay on the streets, ES, or SH. The breaks are allowed to be included in the look back period to calculate the approximate start date ONLY IF:
 - a. the client moved continuously between the streets, shelters, or safe havens. The date would go back as far as the first time they stayed in one of those places; or
 - b. the break in their time on the street, ES or SH was less than 7 nights. A break is considered 6 or less consecutive nights not residing in a place not meant for human habitation, in shelter or in a Safe Haven. The look back time would not be broken by a stay less than 7 consecutive nights; or
 - c. the break in their time on the streets, ES, or SH was less than 90 days due to an institutional stay (i.e. jail, substance abuse or mental health treatment facility, hospital, or other similar facility). The look back time would include all of those days (up to 89 days) when looking back for the start date.
3. If the client knows the actual date – enter the date they indicate. If they know the month and year but not the day, the worker may substitute the day of the month with the project entry day of the month. For example: a client enters the project on March 15, 2015. During the intake interview, the client answers the start date question with a response of "a couple of months". The worker clarifies - "It's March, would that mean you started sleeping on the streets in January this year?" Client affirms, yes, January. The worker clarifies: "Do you know the day?" Client responds: "no." - Worker then enters January 15 (project entry day), (this year).
4. If the HMIS displays information about the person's entry date on the streets, ES or SH, the worker may share that information with the client to help jog their memory. However, administrative information may **not** be substituted for the information provided directly by the client, or entered in the case that the client refuses to answer or does not know the answer, or that the data was not collected by the project from the client.

A-62. Approximate date homelessness started *

Data not collected

A-66. Regardless of where they stayed last night -- Number of times the client has been on the streets, in an Emergency Shelter, or a Safe Haven in the past three years including today *

A-68. Total number of months homeless on the street, in an Emergency Shelter, or a Safe Haven in the past three years *

ES/TH VS. PH:

ES/TH is to be used for ONLY persons entering a Street Outreach, Emergency Shelter, or Safe Haven project


PH is to be used for persons entering all other HMIS project types



HUD Assessment: Project Entry

Page 3: RHY Information

PAGE #1. Universal Information | PAGE #3. RHY Information | PAGE #5. Income and Benefits | PAGE #6. Health Insurance | PAGE #7. Health Information

A-23. Date of RHY - BCP Status Determination
 

A-24. FYSB Youth?
 No
 Yes

A-29. Is the client currently employed?

A-30. Type of Employment


A-31. What is the reason the client is not employed?

A-32. What is the client's general health status?


HUD Assessment: Project Entry


Page 4: Housing Information (PATH Programs)

PAGE #1. Universal Information | PAGE #2. Housing Information | PAGE #4. PATH Information

A-86. Date of PATH Status Determination
 

A-87. Did the client become enrolled in PATH? **
 No
 Yes

A-88. What is the reason the client was not enrolled?
 

A-89. Has the client connected to the SOAR program?
 

HUD Assessment: Project Entry

Page 5: Income and Benefits

PAGE #1. Universal Information PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information

When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.

A-89. Is the client currently receiving income from any source? *

-- Select --

A-123. Is the client currently receiving non-cash benefits from any source? *

-- Select --

HUD Assessment: Project Entry

Page 6: Health Insurance

HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020

Identifier:

PAGE #1. Universal Information | PAGE #2. Living Situation | PAGE #5. Income and Benefits | **PAGE #6. Health Insurance** | PAGE #7. Health Information

A-147. Is the client currently covered by health insurance? *

A-148. Is the client covered by MEDICAID? *

A-150. Is the client currently covered by MEDICARE? *

HUD Assessment: Project Entry

Page 7: Health Information

HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020

Identifier: Sono - COTS, ES MIC - \$

PAGE #1. Universal Information PAGE #2. Living Situation PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information

A-222. Does the client currently have a physical disability? *

-- Select --

A-226. Does the client currently have a developmental disability? *

-- Select --

A-229. Does the client currently have a chronic health condition? *

-- Select --

HUD Assessment: Project Entry

Page 8: HOPWA Information

PAGE #1. Universal Information | PAGE #2. Housing Information | PAGE #5. Income and Benefits | PAGE #6. Health Insurance | PAGE #7. Health Information | PAGE #8. HOPWA Information

A-180. Is the client receiving public HIV/AIDS medical assistance? *

-- Select --

A-181. Choose the reason why the client isn't receiving public HIV/AIDS medical assistance.

-- Select --

A-182. Is the client receiving from the AIDS Drug Assistance Program (ADAP)? *

-- Select --

Previous Page












HUD Assessment: Project Entry

Save as Draft

The Save as Draft option will appear at the bottom of each page in the HUD Assessment

HUD Assessment

 HUD Assessment

Take Action	Program	Status
   	2014 Template	Draft
   	2014 Template	Enabled

[+ New](#)

HUD Assessment: Project Exit



HUD Assessment: Project Exit

A Project Exit must be taken for each member of the Household enrolled in the program.



HUD Assessment: Project Exit

There are 4 steps to completing the HUD Assessment Project Exit:

- Step 1: From the Participant Dashboard, choose take New HUD Assessment
- Step 2: Pre populate the responses from the most recent HUD Assessment
- Step 3: For question A-1, Choose Project Exit
- Step 4: Update any information that has changed since the form was last recorded and save.



HUD Assessment: Project Exit

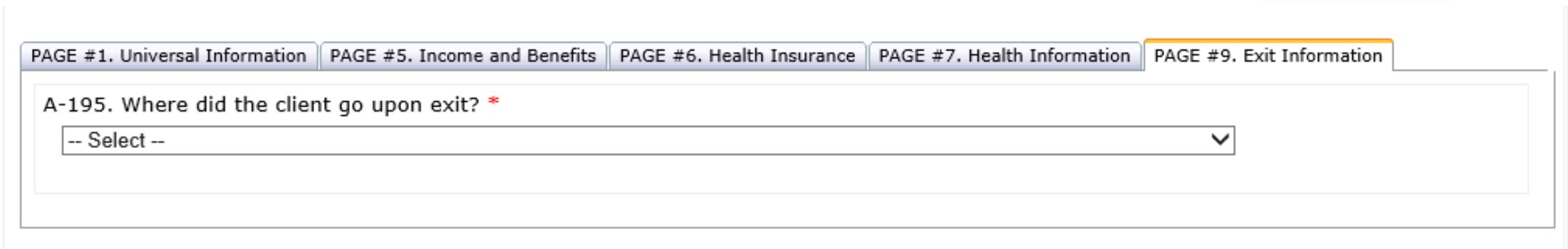
Step 1 & 2: Start the New Assessment & Pre-Populate Previous Responses

- Populate the responses from previous HUD Assessment.
- Update any areas where the information has changed.

HUD Assessment: Project Exit

Step 3 & 4: Choose Project Exit & Update Information

- Fill out the information on where the client went upon exit from the program.



PAGE #1. Universal Information PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information PAGE #9. Exit Information

A-195. Where did the client go upon exit? *

-- Select --



Welcome to Office Hours!

- Please use this time to

COMPLETE HANDS-ON ASSIGNMENTS

ASK QUESTIONS ABOUT FUNCTIONALITY

ASK TRAINER TO REDO A DEMO

ASK REAL-LIFE APPLICATION QUESTIONS



We Value Your Feedback!

To help us improve our training,
please complete the survey!



Logging In

We will begin by accessing ETO:
www.etosoftware.com

Keep the following in mind:

ETO is only fully compatible with I.E. version 10 or higher.



Hands-On Activity

Complete the following:

**** Be sure to use FAKE as the last name****

- Enroll two **Fake** Participants to the program.
- Add your participants to the same Family.
- Complete Entry Assessment for your Family.
- Dismiss your Fake Participant from the program.



Thank you for joining us!

CONTACT US ANYTIME AT SUPPORT@SOCIALSOLUTIONS.COM OR LOGIN TO THE HELP CENTER!