Sonoma County: Street Outreach

Social Solutions

Welcome!

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Agenda

ENROLLMENT

HOUSEHOLD

HUD ENTRY ASSESSMENT

OUTREACH & SERVICES FORMS

HUD EXIT ASSESSMENT/PROGRAM DISMISSAL

OFFICE HOURS

Learning Objective

To provide an overview of Street Outreach 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

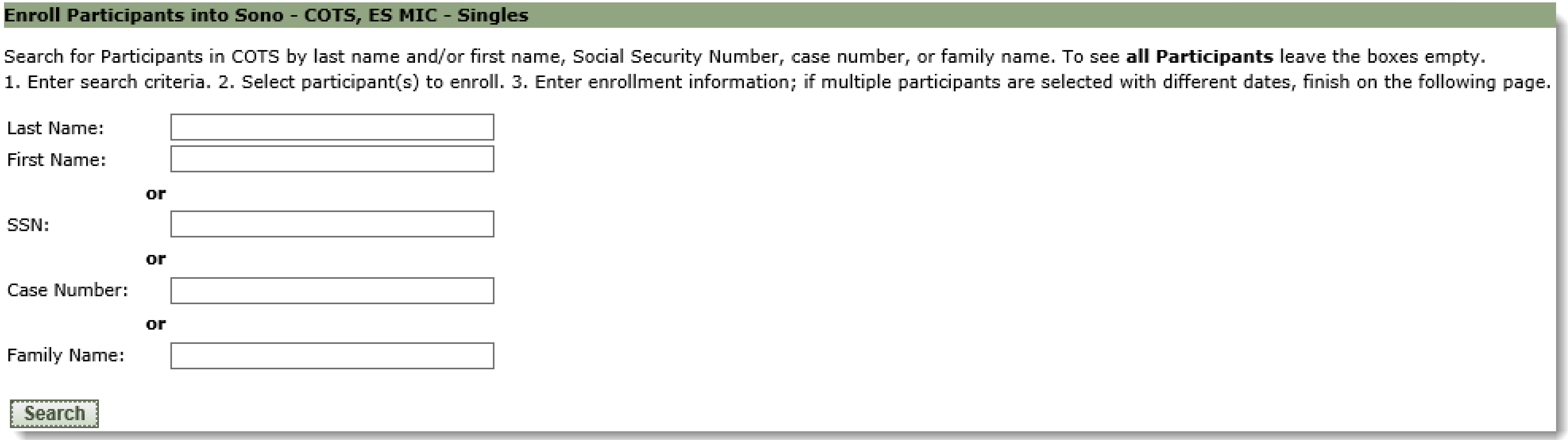
- The Quick Search is used to look for participants who are already enrolled in the program.
- A blank quick search will return ALL of the participants currently enrolled in the program

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:

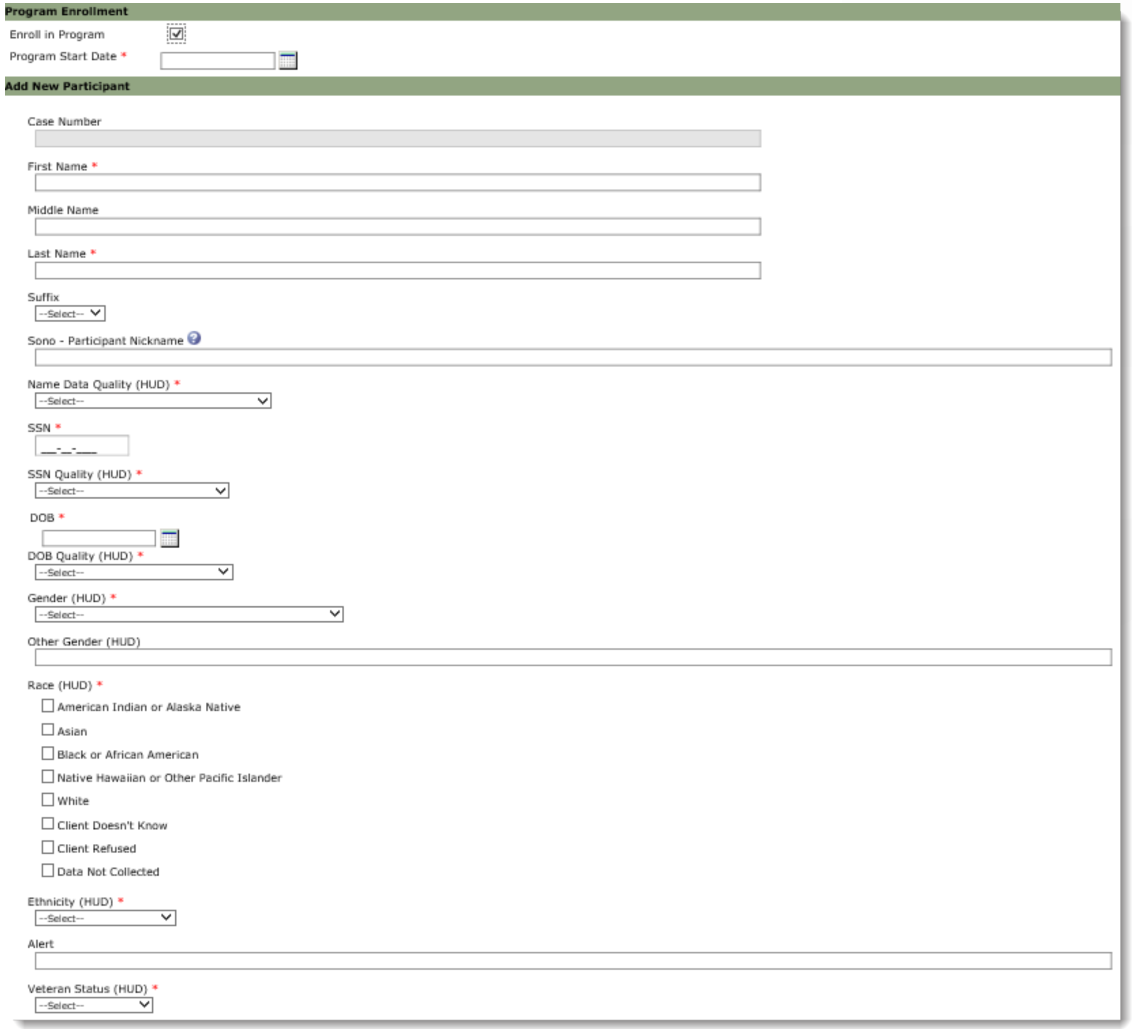
Search

Enrollment

Enrolling Participants

New Participants

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



BEST PRACTICE TIP

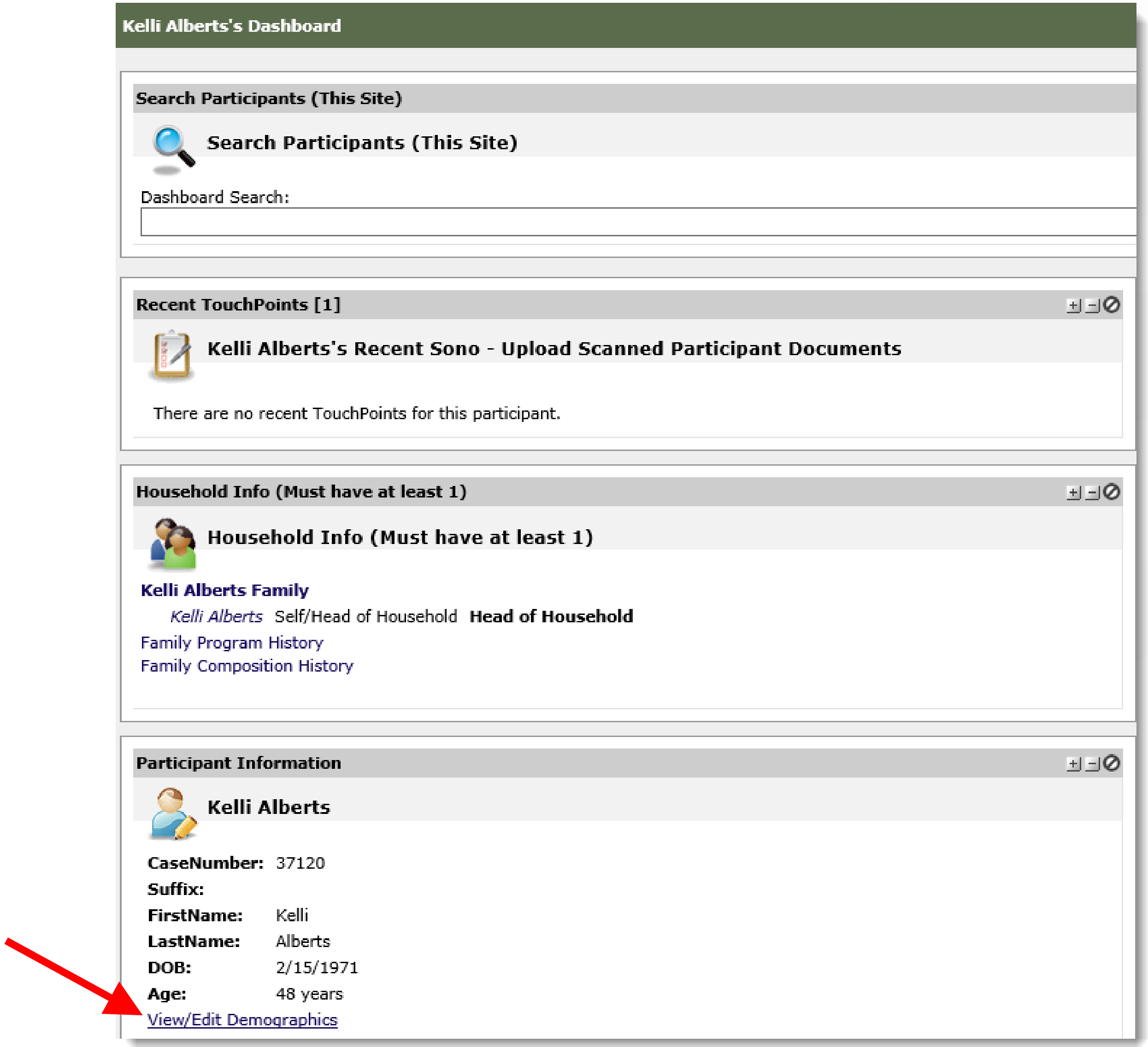
Any custom demographics ending with (HUD) needs to be completed for ALL HMIS participants.

Enrollment

Enrolling Participants

Participants in other Programs

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



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.

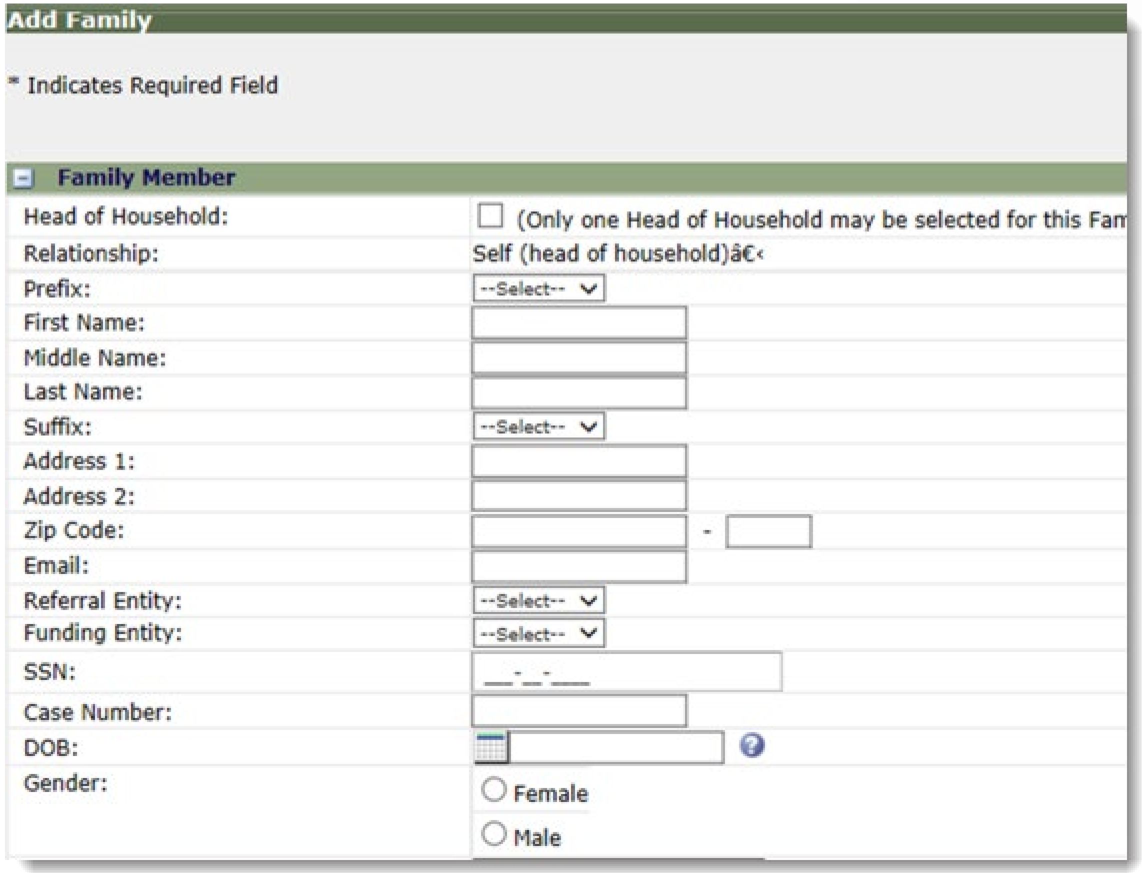
A Single Participant is a Household of one and the Head of Household

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



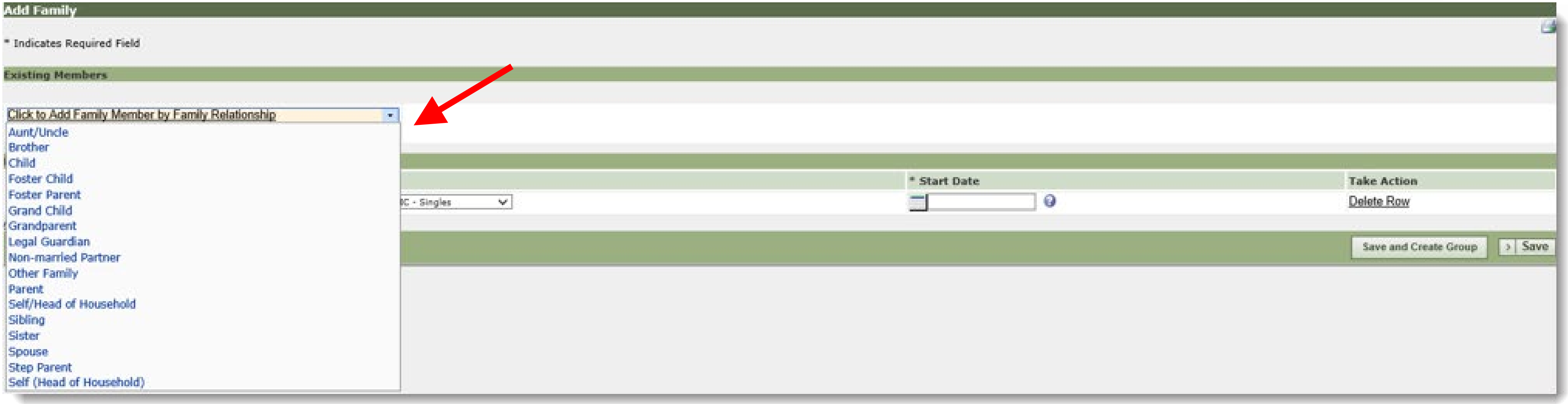
Household

Edit Family Information

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

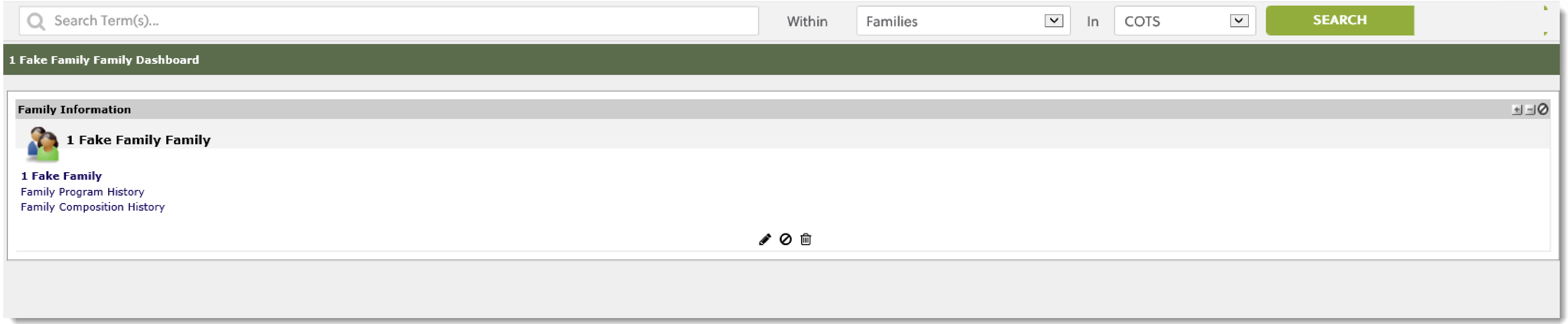
Household

Edit an Exiting Family for adding New Members



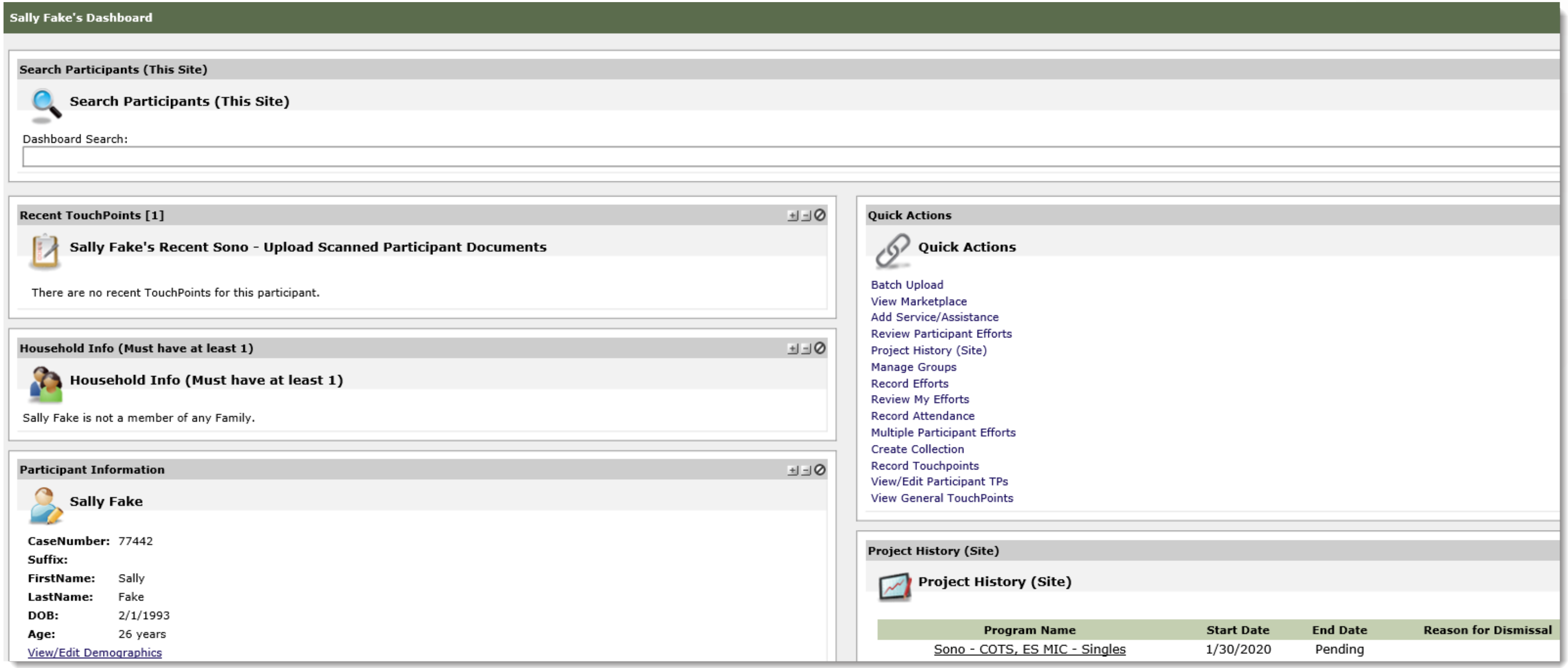
Household

Family Dashboard



Household

Participant Dashboard

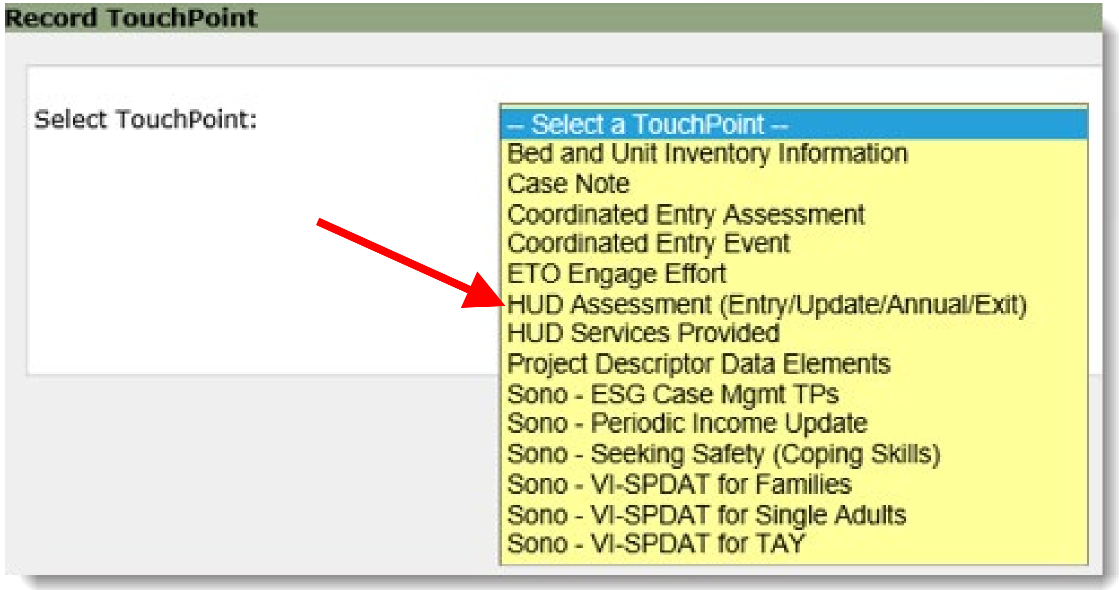


HUD Assessment: Project Entry

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.



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

HUD 2014 TP's (Enterprise)

HUD 2014 TP's (Enterprise)

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

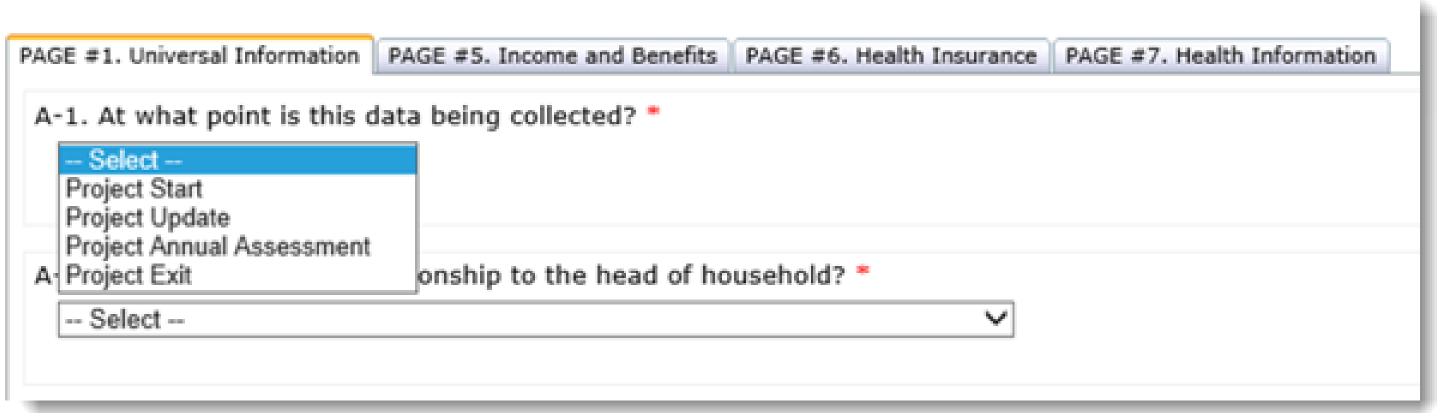
The HUD Assessment is organized into four sections:

- 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



HUD Assessment: Project Entry

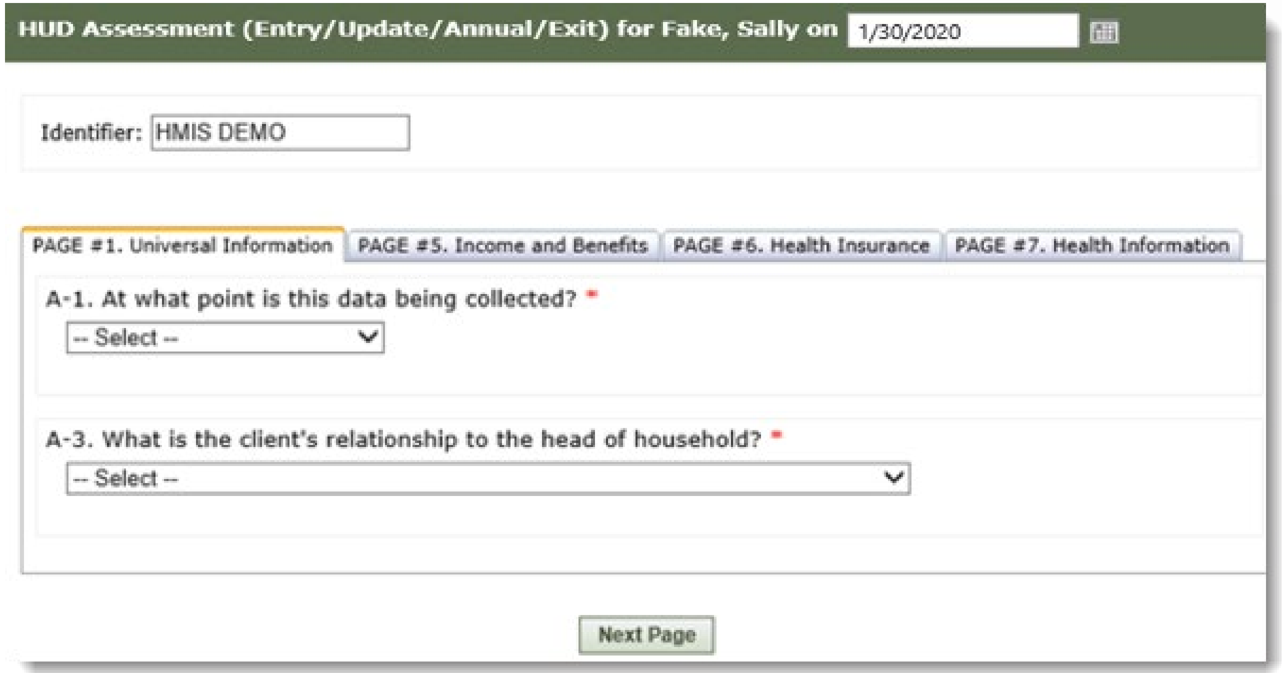
Always take a HUD Assessment

- 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.



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

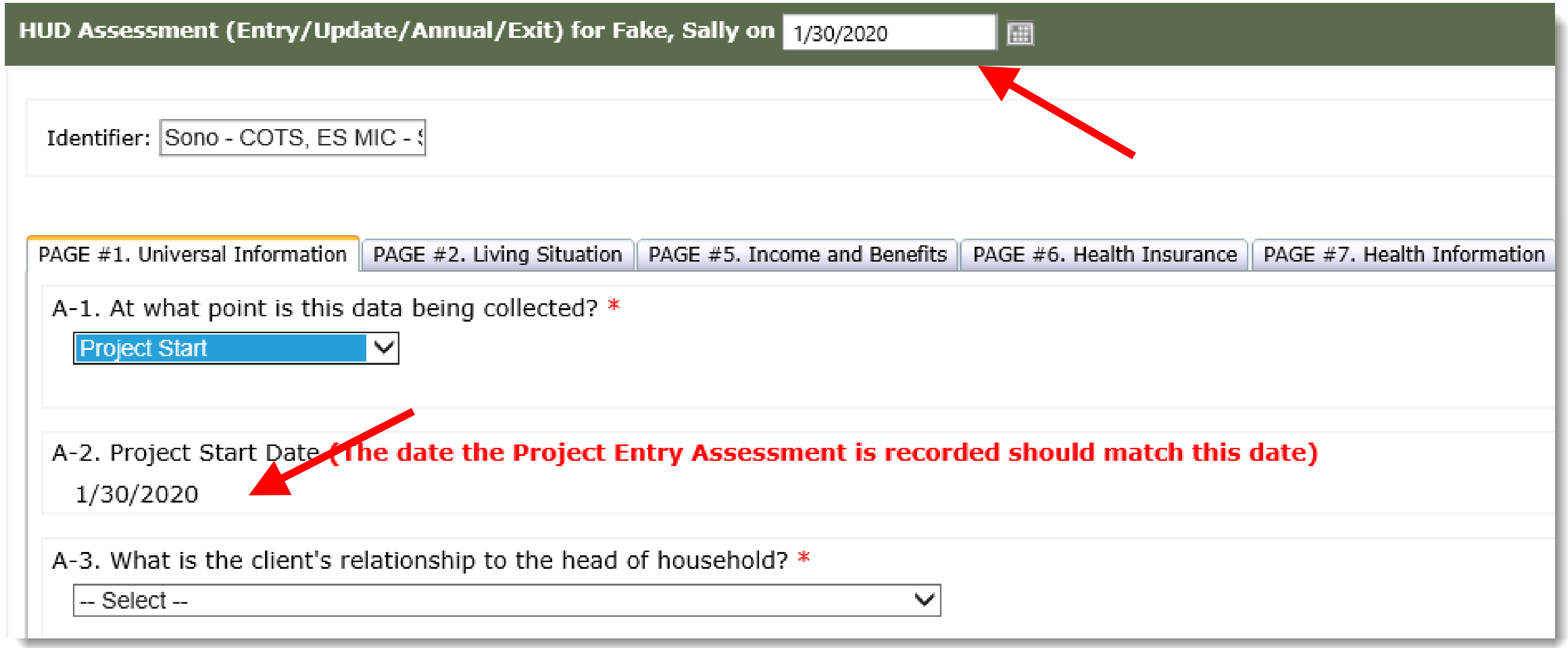
A-5. HUD-assigned CoC code for the client's location (Please enter the CoC code from the question above. If there are multiple CoC codes listed above, please choose the code that links the client to the correct CoC based on the geographic area where the head of household is staying at the time of project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

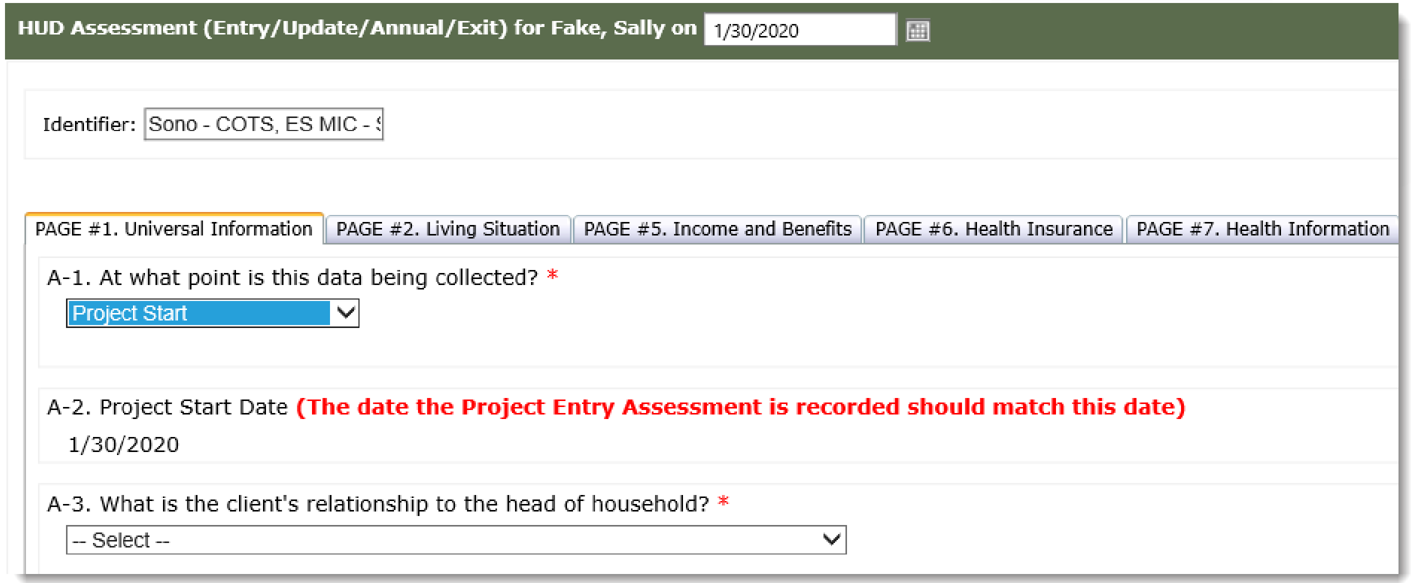


HUD Assessment: Project Entry

Page #1: Universal Information

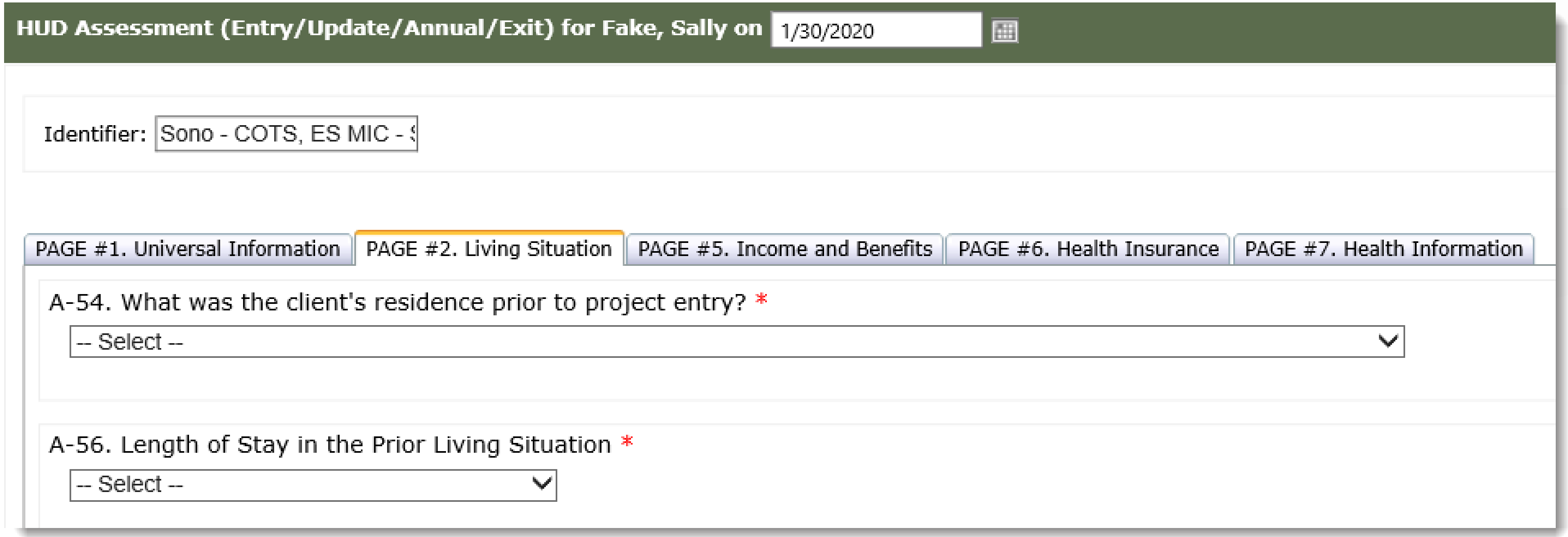
Identifiers

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



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 - S

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

-- Select --

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

-- Select --

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 *

mm/dd/yyyy

Data not collected

Clear Selection

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 *

-- Select --

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

-- Select --

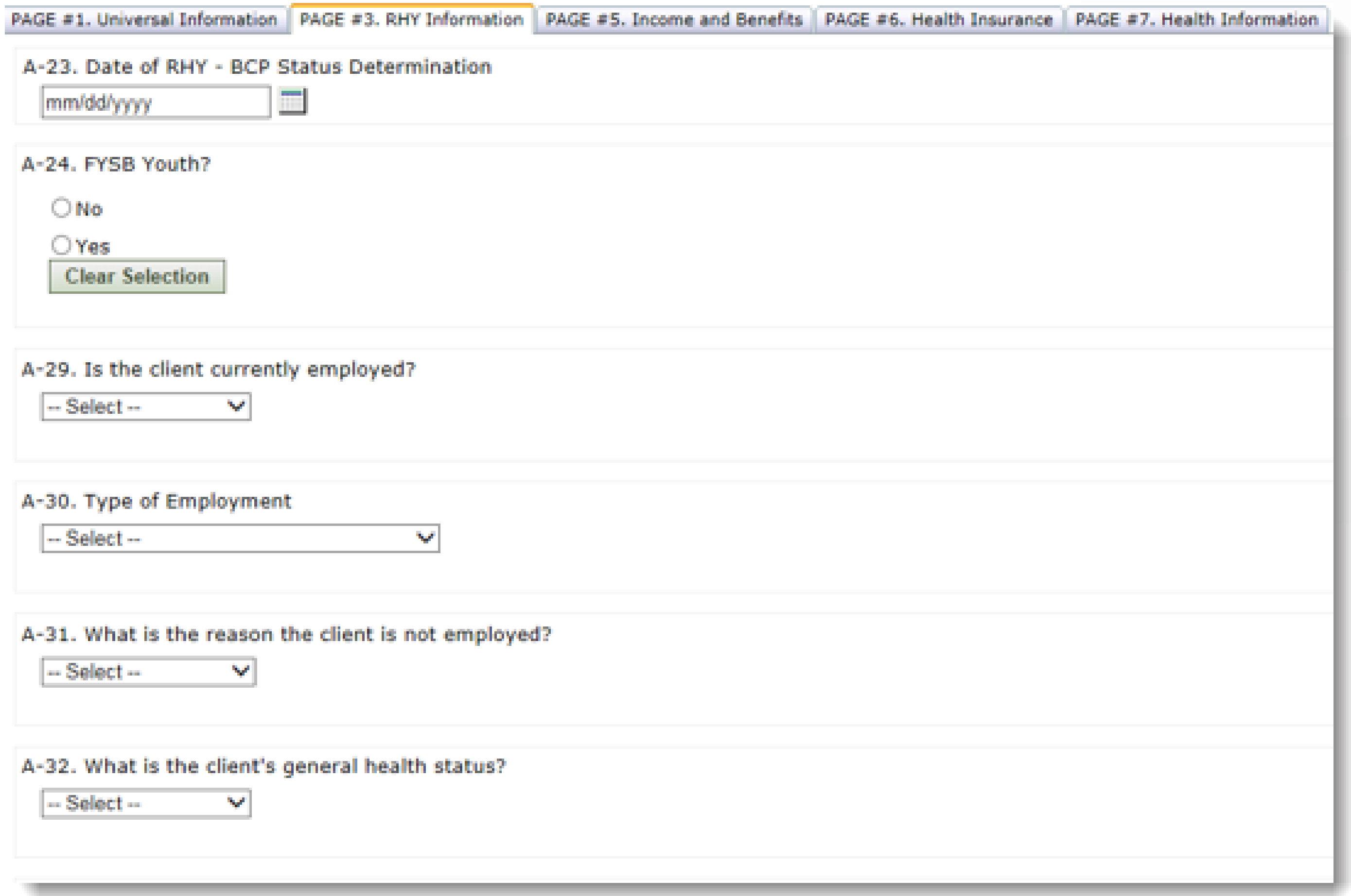
ES/TH VS. PH:

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

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

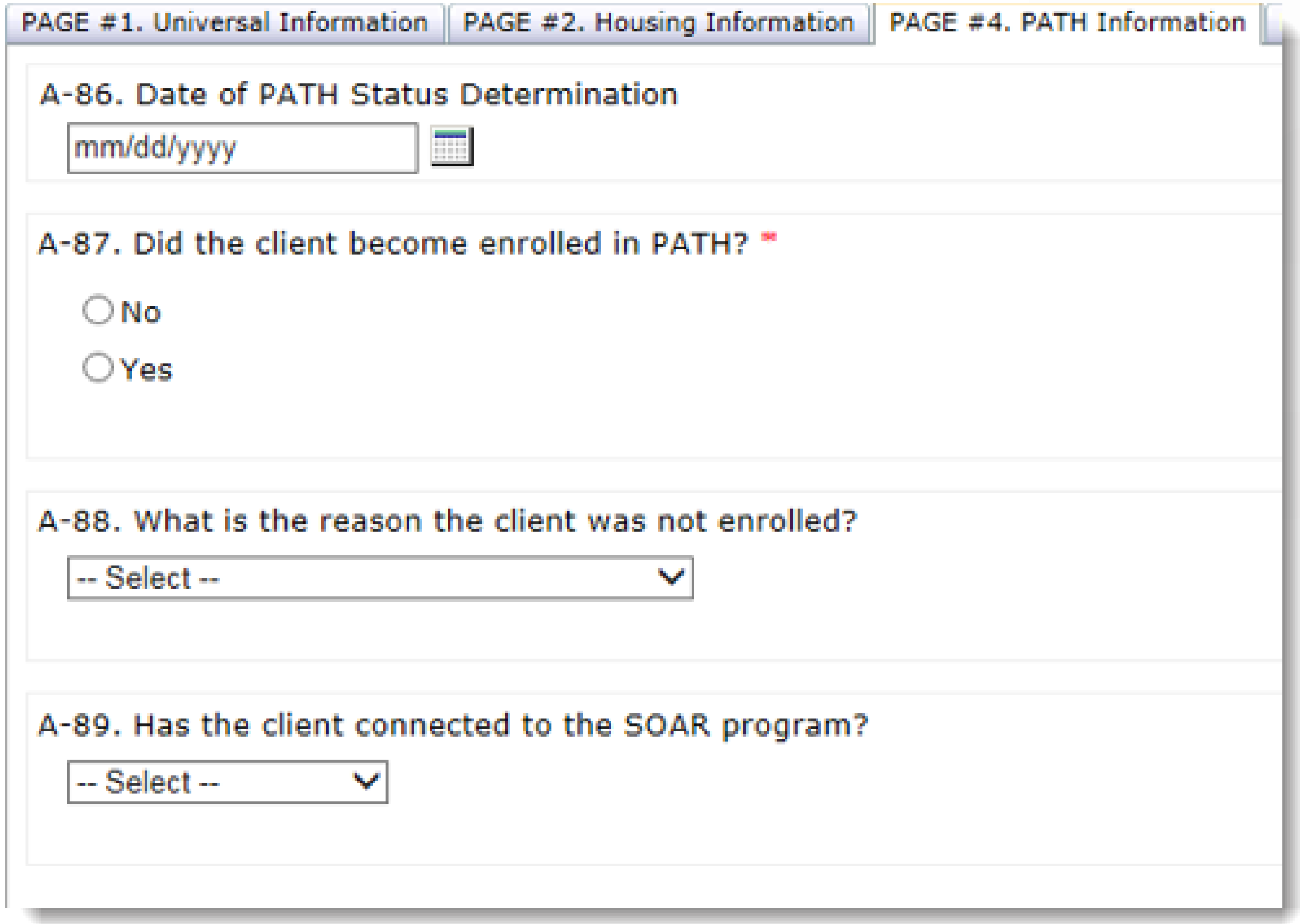
HUD Assessment: Project Entry

Page 3: RHY Information



HUD Assessment: Project Entry

Page 4: Housing Information (PATH Programs)



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? *

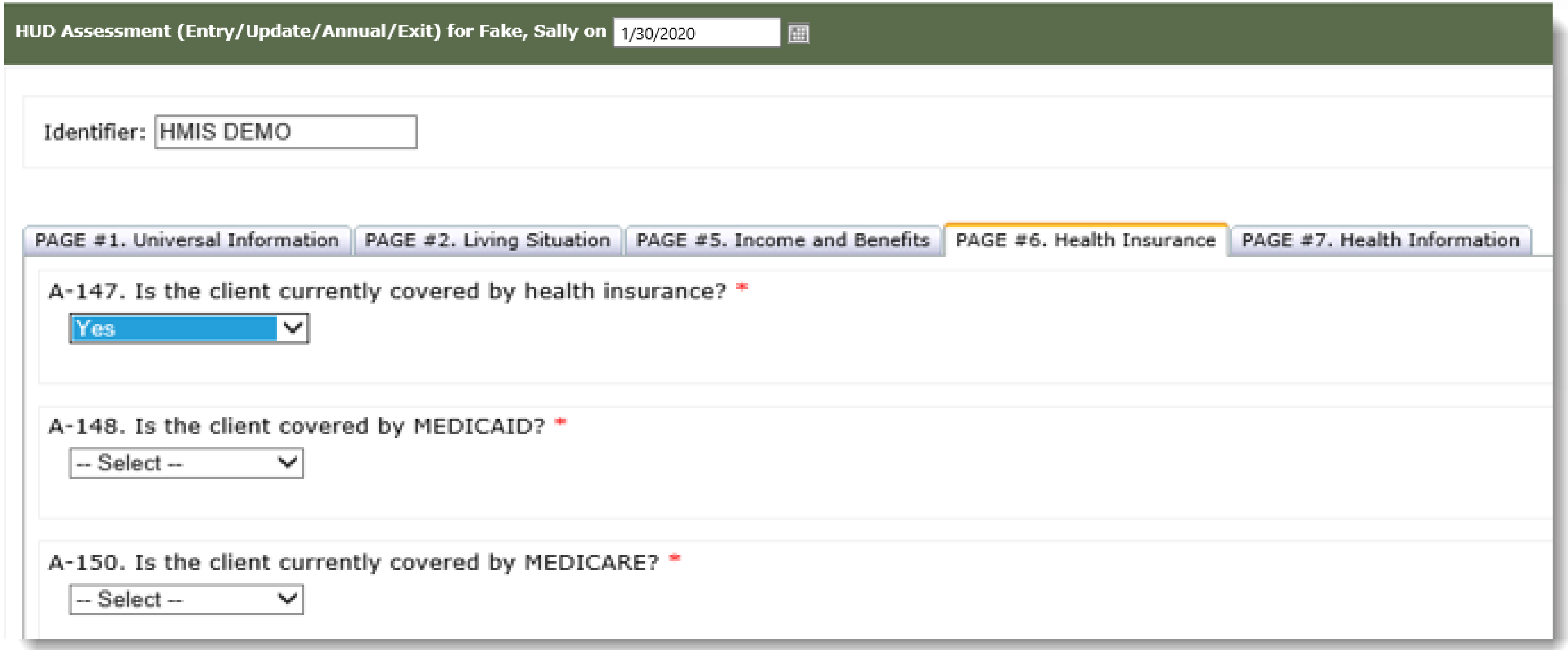
-- Select --

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

-- Select --

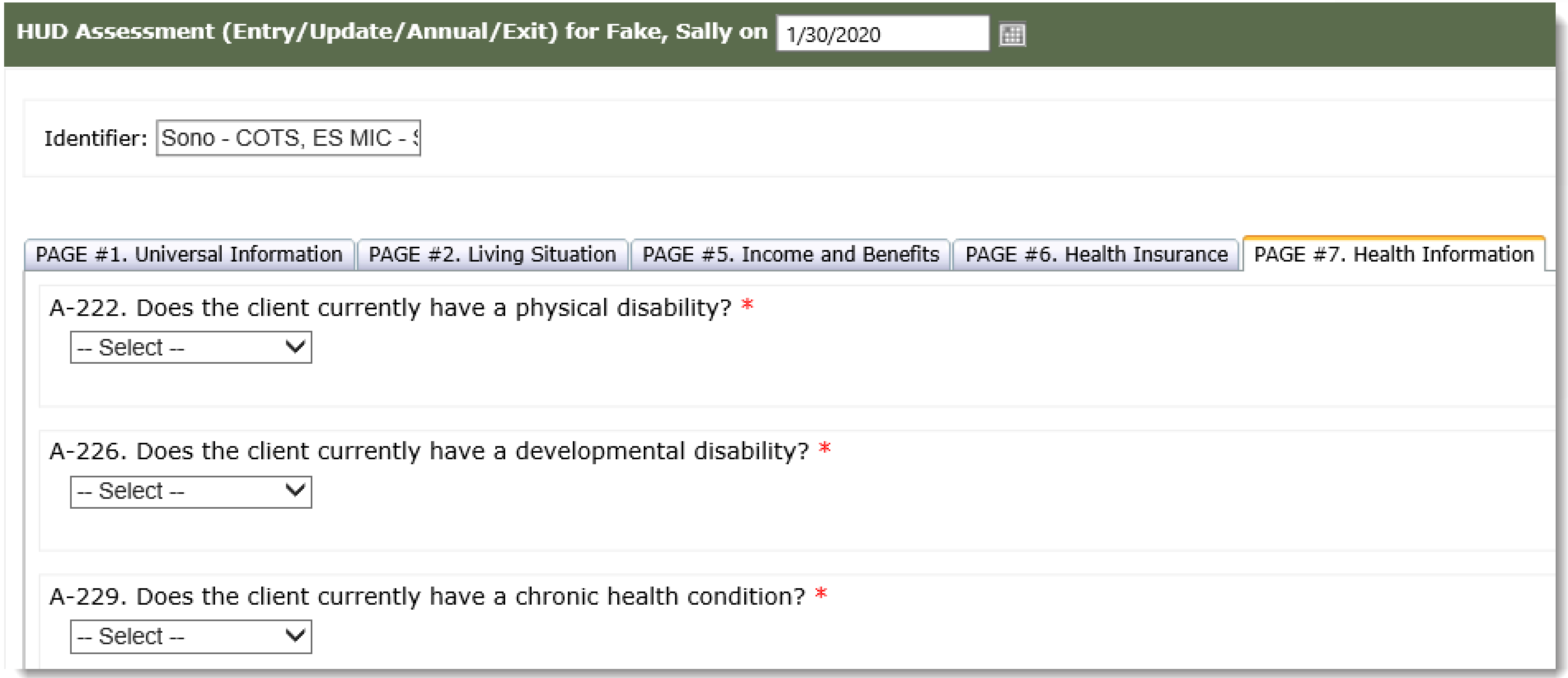
HUD Assessment: Project Entry

Page 6: Health Insurance



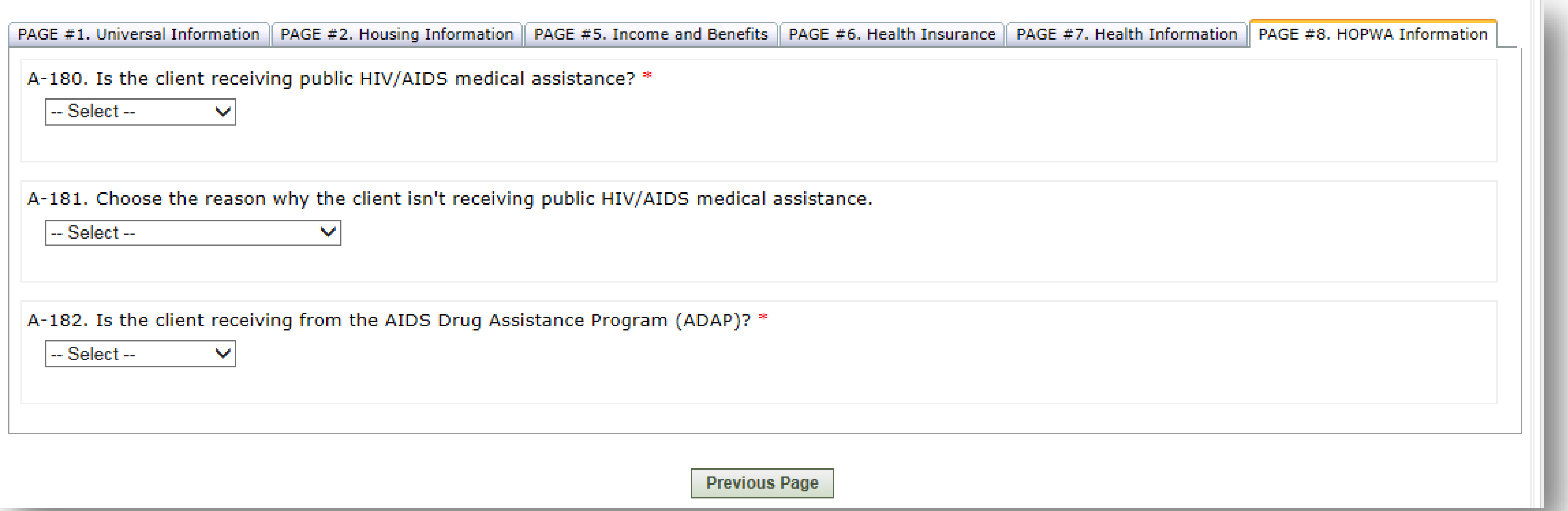
HUD Assessment: Project Entry

Page 7: Health Information



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)? *

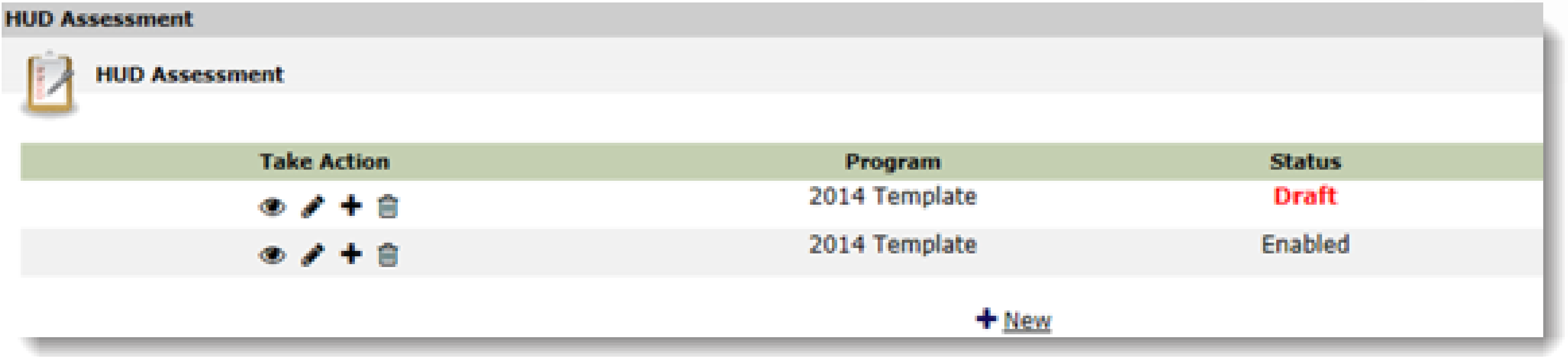
-- Select --

Previous Page

HUD Assessment: Project Entry

Save as Draft

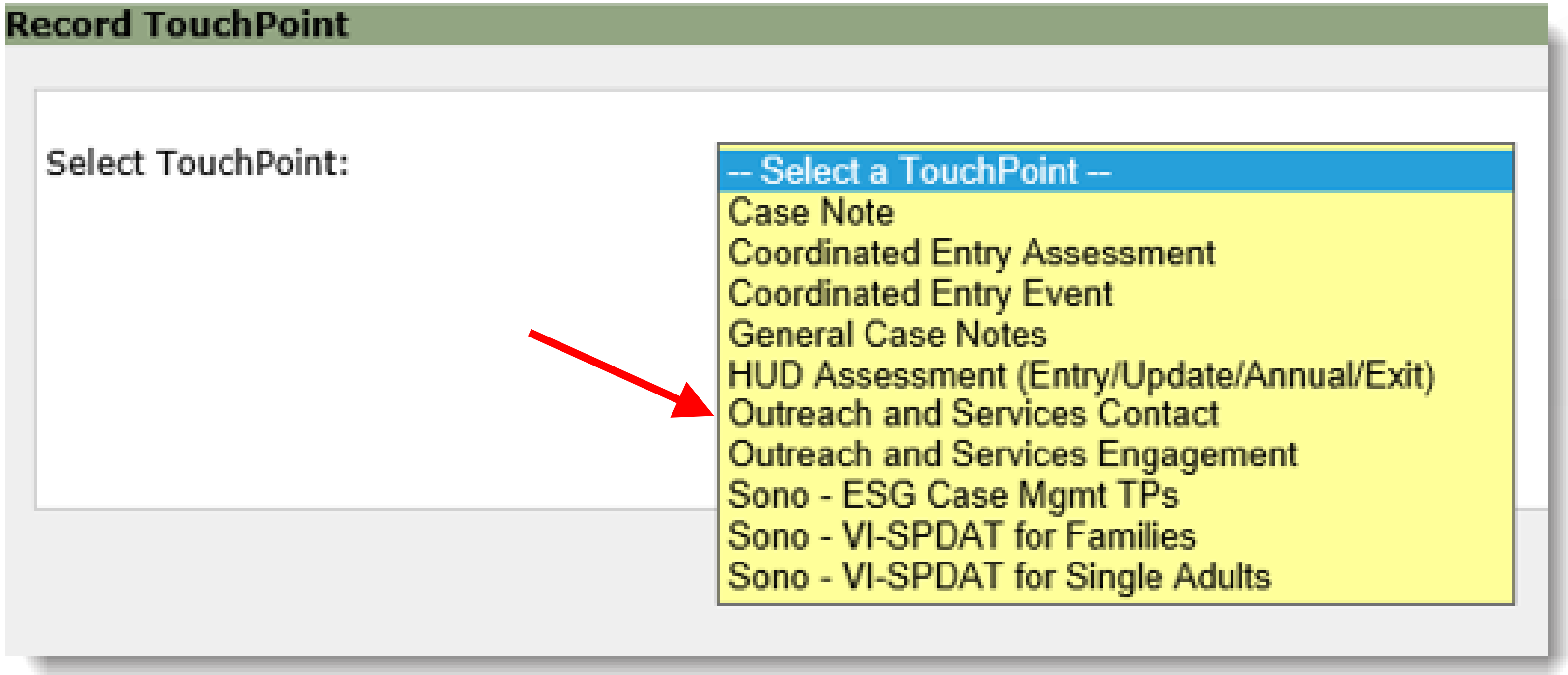
The Save as Draft option will appear at the bottom of each page in the HUD Assessment



Outreach & Services Forms

Outreach & Services Forms

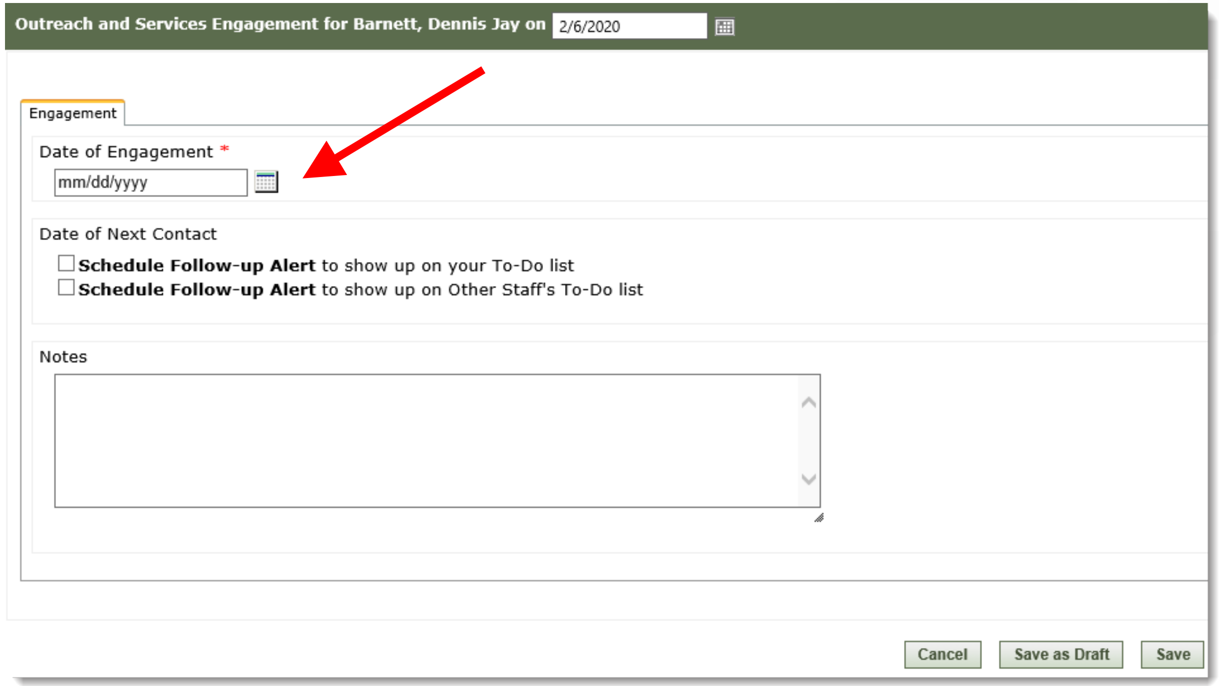
Recording TouchPoints for Outreach & Services



Outreach & Services Forms

Outreach and Service Engagement

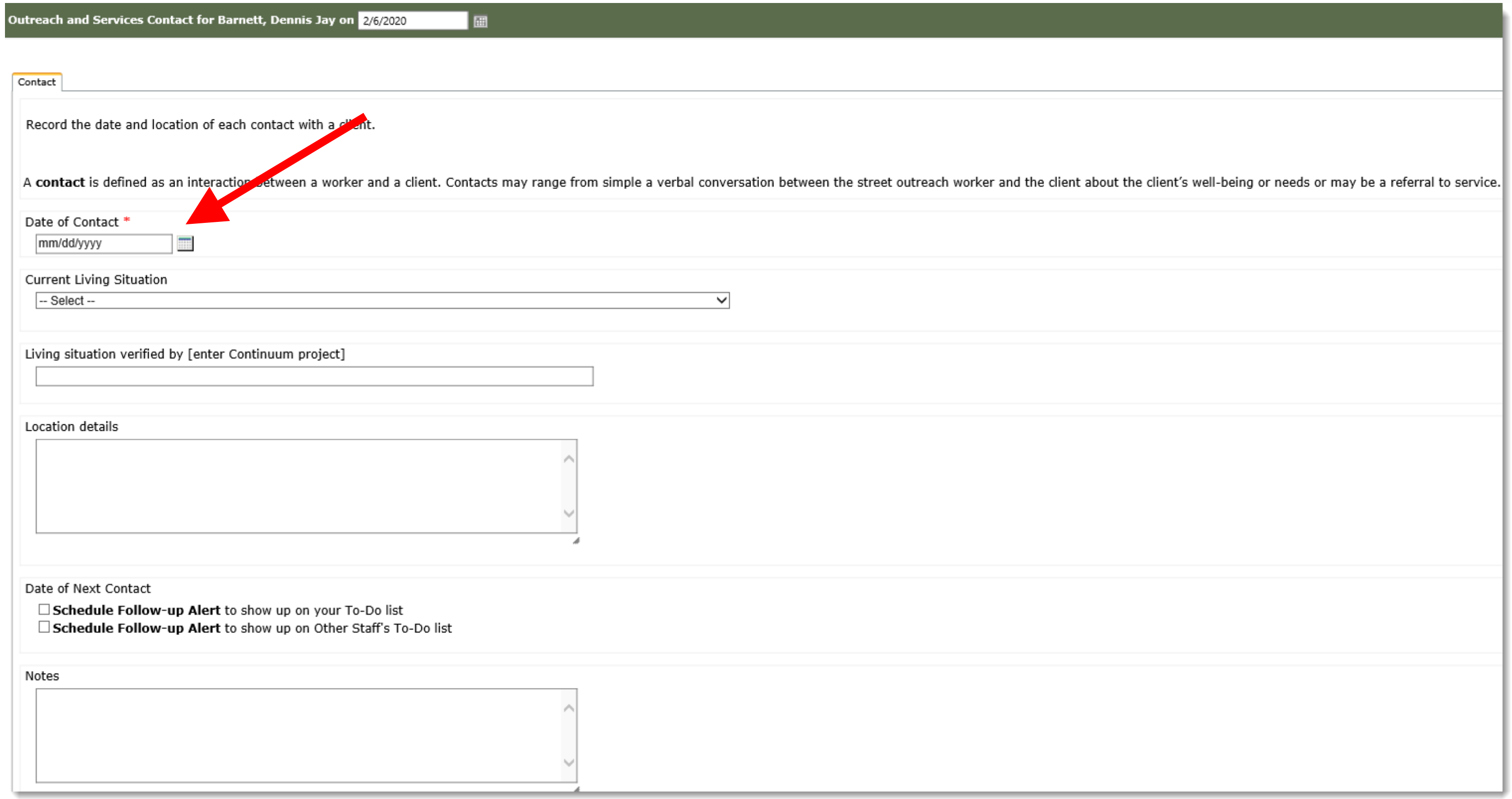
- Form used to track initial date of contact with participant.



Outreach & Services Forms

Outreach and Service Contact

- Form used to track each contact with participant.


Outreach and Services Contact for Barnett, Dennis Jay on 2/6/2020

Contact

Record the date and location of each contact with a client.

A **contact** is defined as an interaction between a worker and a client. Contacts may range from simple a verbal conversation between the street outreach worker and the client about the client's well-being or needs or may be a referral to service.

Date of Contact *

mm/dd/yyyy

Current Living Situation

-- Select --

Living situation verified by [enter Continuum project]

Location details

Date of Next Contact

☐ **Schedule Follow-up Alert** to show up on your To-Do list

☐ **Schedule Follow-up Alert** to show up on Other Staff's To-Do list

Notes

HUD Assessment: Project Update

HUD Assessment: Project Update

When to Take a Project Update

- When there is new information for the Participant.

HUD Assessment: Project Update

There are 4 steps to update a HUD Assessment:

- 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 Update
- Step 4: Update any information that has changed since the form was last recorded and save.

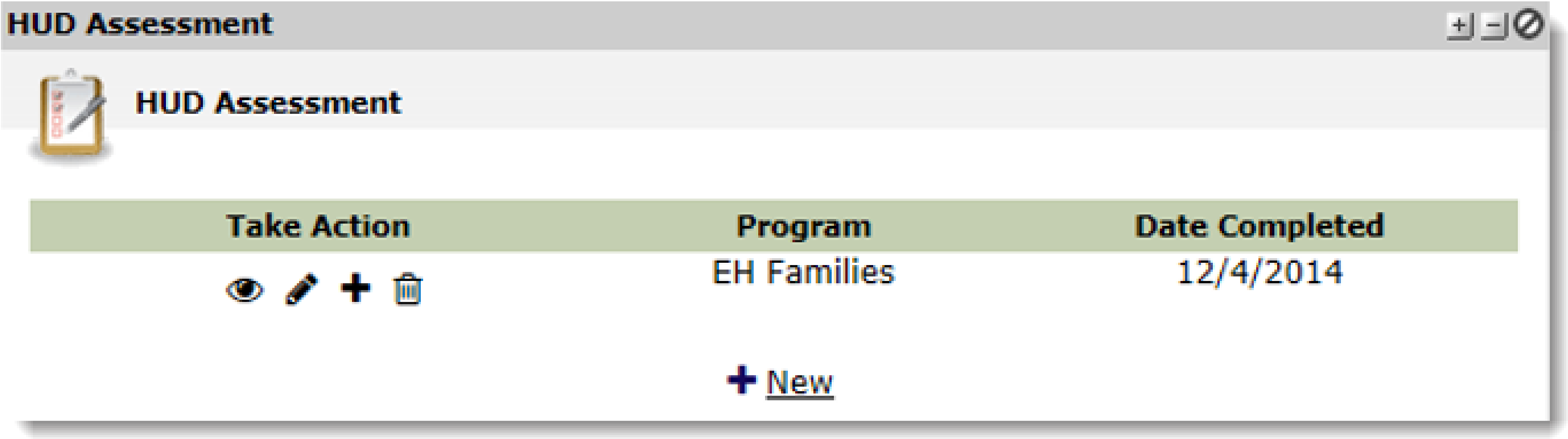
A HUD Assessment: Project Update may not need to be recorded for your participant if their information does not change during program enrollment.

HUD Assessment: Project Update

Step 1: Take a new HUD Assessment

Participant Dashboard > HUD Assessment ETO Part

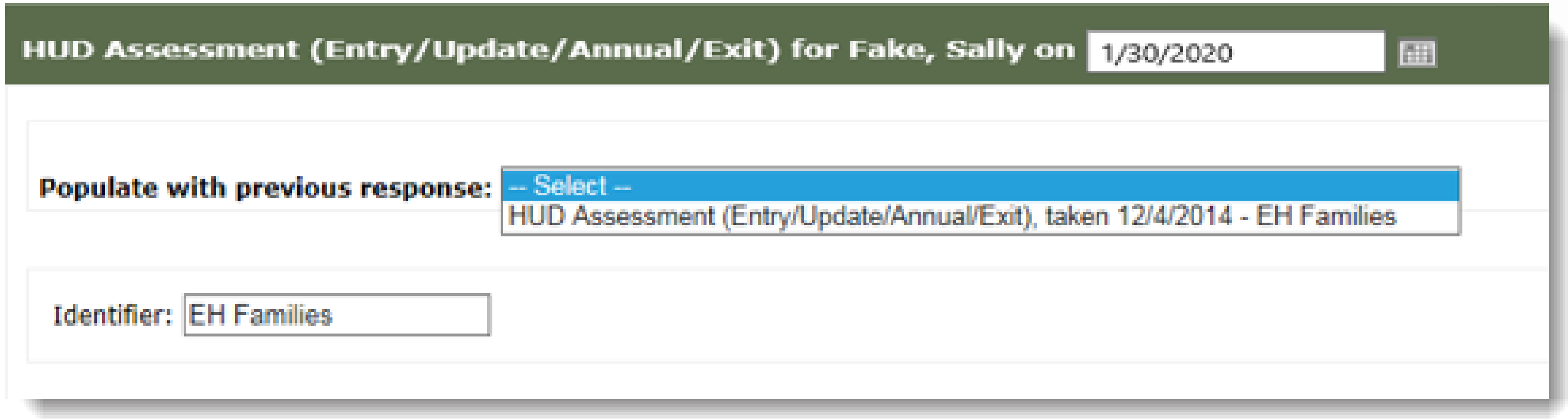
- You should see the HUD Assessment that you completed at Project Entry
- Click New.



HUD Assessment: Project Update

Step 2: Populate with Previous Responses

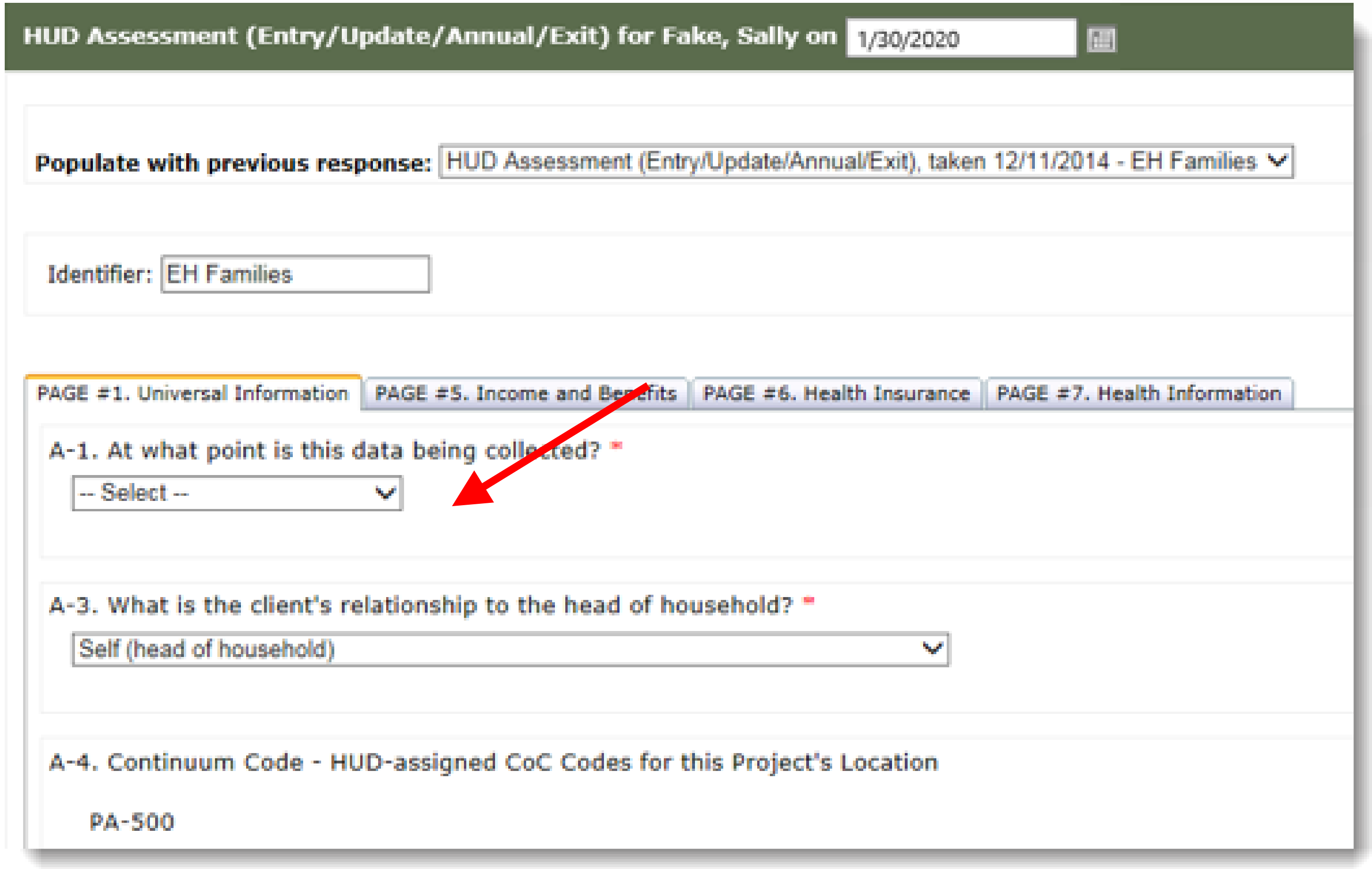
- Choose the most recent data completed in the HUD Assessment (Project Entry) to pre-populate the HUD Assessment: Project Update.
- Responses can also pre-populate into the Annual and Exit Assessments.



Be sure to populate data BEFORE entering any data into the form. Prepopulating will overwrite any data you have entered into the fields.

HUD Assessment: Project Update

Step 3 & 4: Choose Project Update & Update Information that Changed



HUD Assessment: Project Annual Assessment

HUD Assessment: Project Annual Assessment

A Project Annual Assessment must be taken for **EACH** member of the Household enrolled in the program.

At least 30 days before or after the participant's anniversary in the program

HUD Assessment: Project Annual Assessment

There are 4 steps to completing the Annual HUD Assessment :

- 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 Annual Assessment
- Step 4: Update any information that has changed since the form was last recorded and save.

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

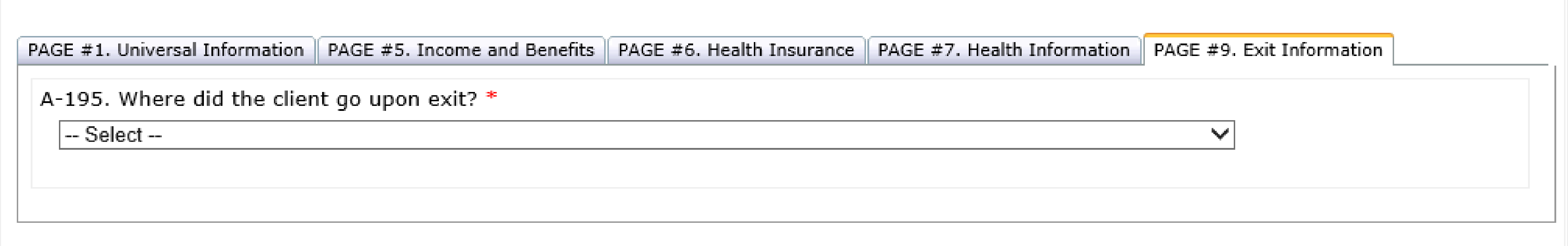
Step 1 & 2: Start the New Assessment & Pre-Populate Previous Responses

- 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.



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:

Use the Last name as Fake!

Send the program that you are in to the trainer in the chat

- Enroll two **Fake** Participants to the program.
- Add your participants to the same Family.
- Complete Entry Assessment for your Family.
- Complete a Outreach and Services Engagement for your Participant.
- Complete 2 Outreach and Services Contacts for your Participant.
- 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!