



# Sonoma County: Street Outreach

# 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

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 Participants" and "In 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

**Program Enrollment**

Enroll in Program

Program Start Date \*

---

**Add New Participant**

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) \*

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Client Doesn't Know
- Client Refused
- Data Not Collected

Ethnicity (HUD) \*

Alert

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)**

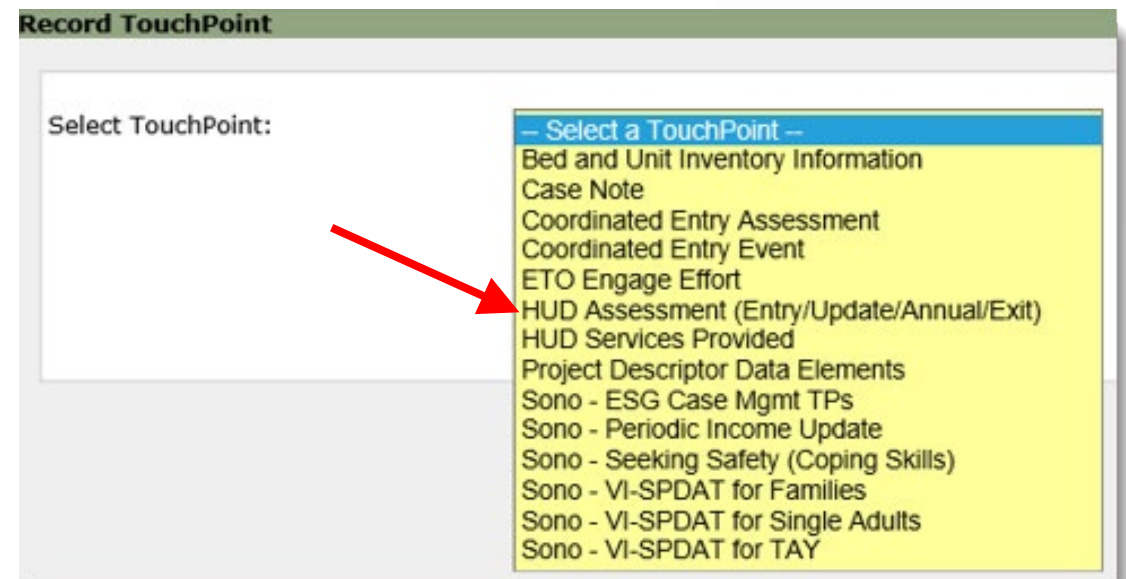
Program Name	Start Date	End Date	Reason for Dismissal
Sono - COTS, ES MIC - Singles	1/30/2020	Pending	

# 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, followed by another dropdown menu showing '-- Select --' and a downward arrow.



# 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: HMIS DEMO

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? \*

Yes

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

-- Select --

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

-- Select --

# 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

The screenshot shows a web interface for 'HUD Assessment'. At the top, there is a header 'HUD Assessment' and a sub-header 'HUD Assessment' with a clipboard icon. Below this is a table with three columns: 'Take Action', 'Program', and 'Status'. The first row shows '2014 Template' with a status of 'Draft' in red. The second row shows '2014 Template' with a status of 'Enabled'. At the bottom right of the table area, there is a '+ New' button.

Take Action	Program	Status
	2014 Template	<b>Draft</b>
	2014 Template	Enabled

[+ New](#)

# Outreach & Services Forms




# Outreach & Services Forms

Recording TouchPoints for Outreach & Services

**Record TouchPoint**

Select TouchPoint:

- Select a TouchPoint --
- Case Note
- Coordinated Entry Assessment
- Coordinated Entry Event
- General Case Notes
- HUD Assessment (Entry/Update/Annual/Exit)
- Outreach and Services Contact
- Outreach and Services Engagement
- Sono - ESG Case Mgmt TPs
- Sono - VI-SPDAT for Families
- Sono - VI-SPDAT for Single Adults





# Outreach & Services Forms

## Outreach and Service Engagement

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

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

Engagement

Date of Engagement \*  
mm/dd/yyyy

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

Cancel Save as Draft Save

# 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]  
[Text Field]

Location details  
[Text Field]

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  
[Text Field]

# 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.***

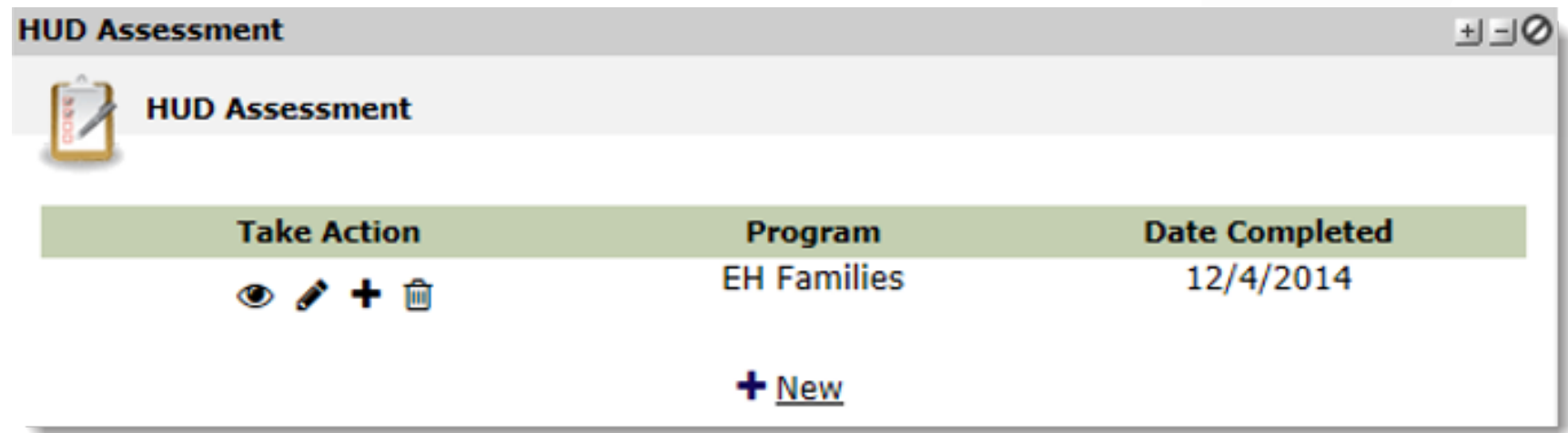






# HUD Assessment: Project Update

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.

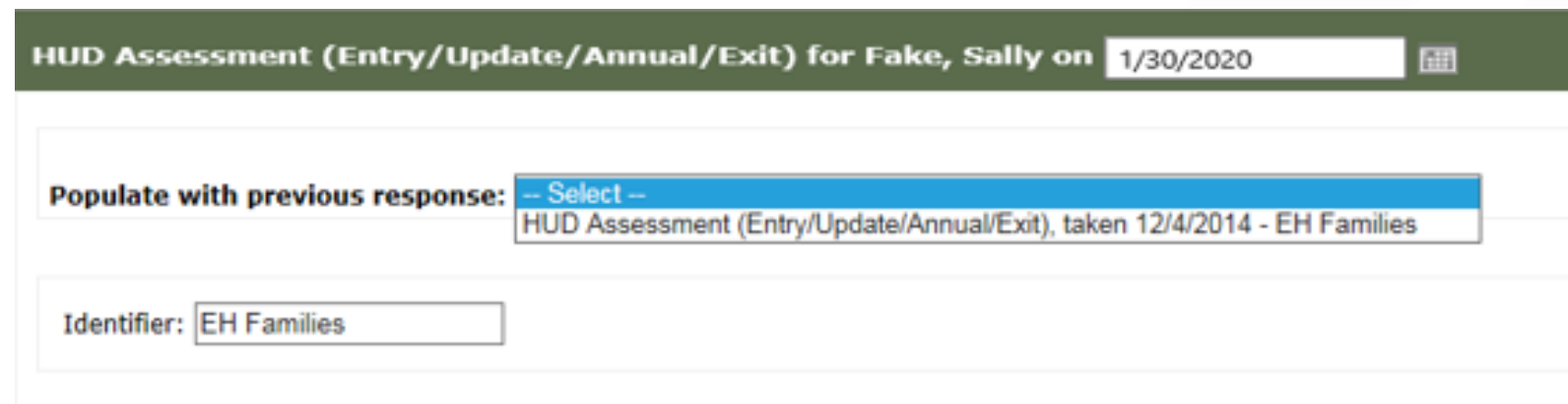


Take Action	Program	Date Completed
   	EH Families	12/4/2014
<a href="#">+ New</a>		

# 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.



The screenshot shows a web form titled "HUD Assessment (Entry/Update/Annual/Exit) for Fake, Sally on 1/30/2020". The form has a dark green header bar with the title and date. Below the header, there is a section labeled "Populate with previous response:" with a dropdown menu. The dropdown menu is open, showing two options: "-- Select --" (highlighted in blue) and "HUD Assessment (Entry/Update/Annual/Exit), taken 12/4/2014 - EH Families". Below the dropdown, there is a text input field labeled "Identifier:" with the text "EH Families" entered.



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

Populate with previous response: HUD Assessment (Entry/Update/Annual/Exit), taken 12/11/2014 - EH Families

Identifier: EH Families

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? \*

Self (head of household)

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

PA-500

# 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

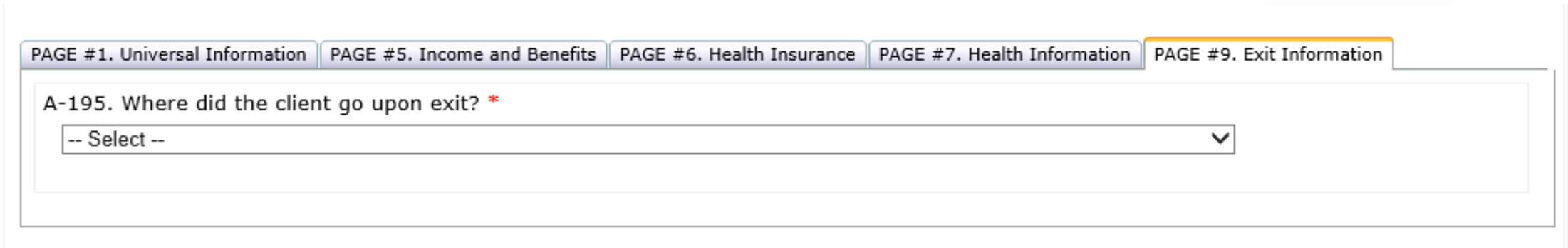
Step 1 & 2: Start the New Assessment & Pre-Populate Previous Responses

- 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.



The screenshot displays a multi-page form interface. At the top, there are five tabs: 'PAGE #1. Universal Information', 'PAGE #5. Income and Benefits', 'PAGE #6. Health Insurance', 'PAGE #7. Health Information', and 'PAGE #9. Exit Information'. The 'PAGE #9. Exit Information' tab is highlighted with an orange border. Below the tabs, the question 'A-195. Where did the client go upon exit? \*' is displayed. Underneath the question is a dropdown menu with the text '-- Select --' and a downward-pointing arrow icon.



# 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](http://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](mailto:SUPPORT@SOCIALSOLUTIONS.COM) OR LOGIN TO THE HELP CENTER!