Sonoma County HMIS End User Training

Social Solutions

Welcome!

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Agenda

BASIC NAVIGATION

HOUSEHOLD

HUD ASSESSMENT: PROJECT ENTRY

HUD ASSESSMENT: PROJECT UPDATE

HUD ASSESSMENT: PROJECT ANNUAL ASSESSMENT

HUD ASSESSMENT: PROJECT EXIT

REVIEW AND EDIT HUD ASSESSMENT

Learning Objective

Become familiar with the HUD Assessment, and the four times that it can be recorded for a participant during their program enrollment.

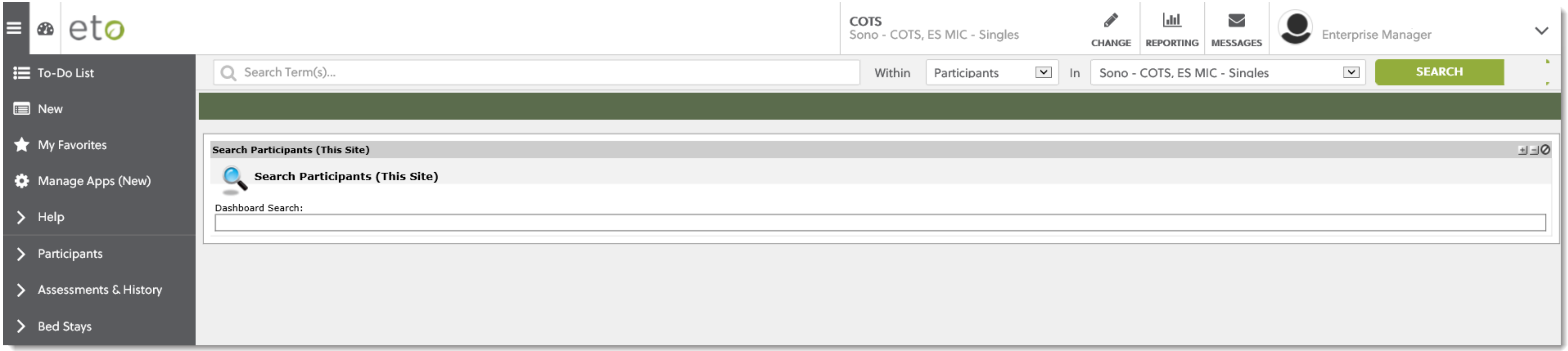
Basic Navigation

Basic Navigation

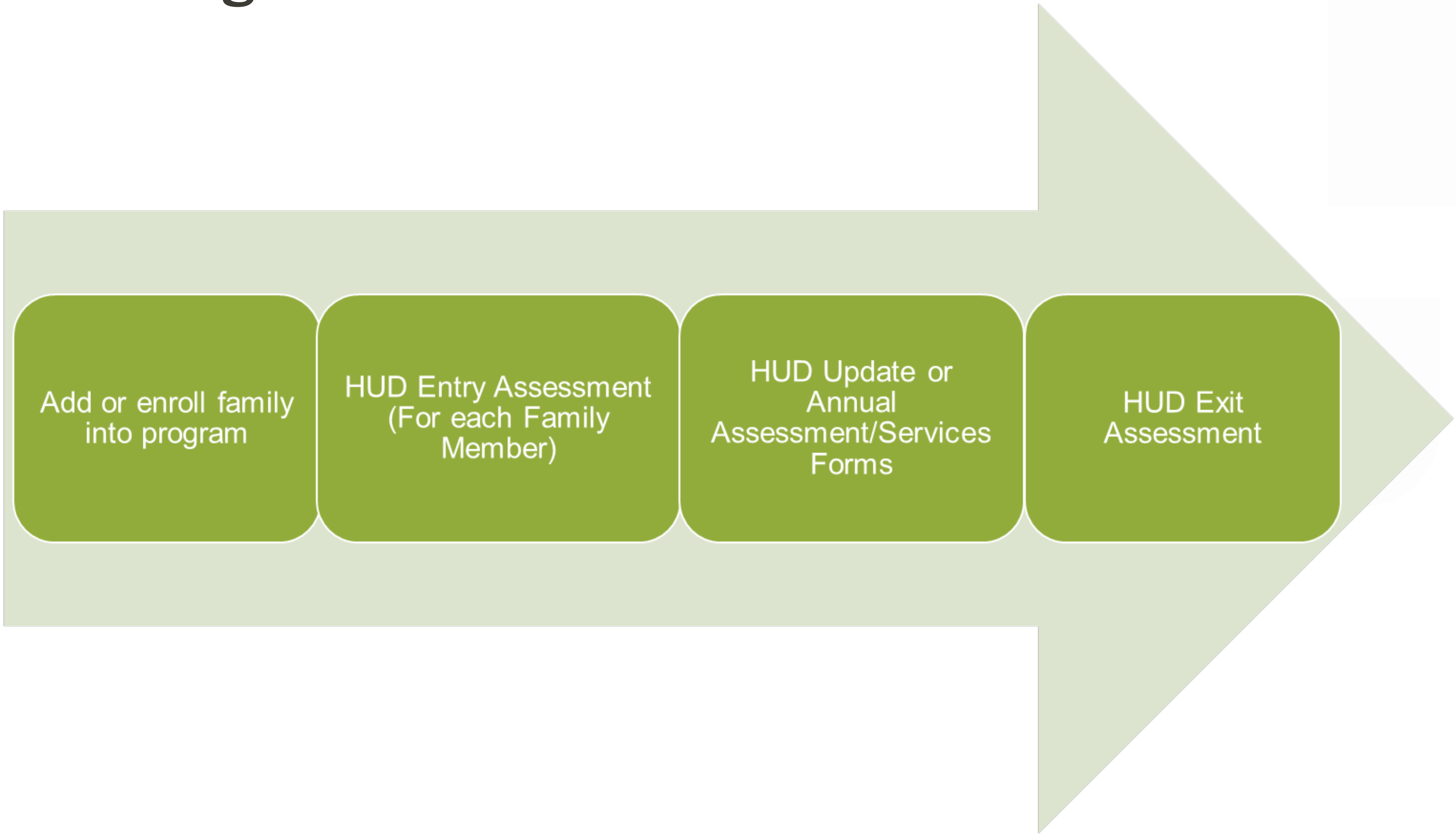
ETO Terminology

- **Participant** refers to the target population that you are serving.
- **Household** refers to participants who live together. A household is also created for a single participant for HUD reporting.
- **TouchPoints** refers to forms, used to capture information and measure progress (Pre/Post tests). TouchPoints are also used to track attendance.

Basic Navigation



Basic Navigation



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

Searching for Participants

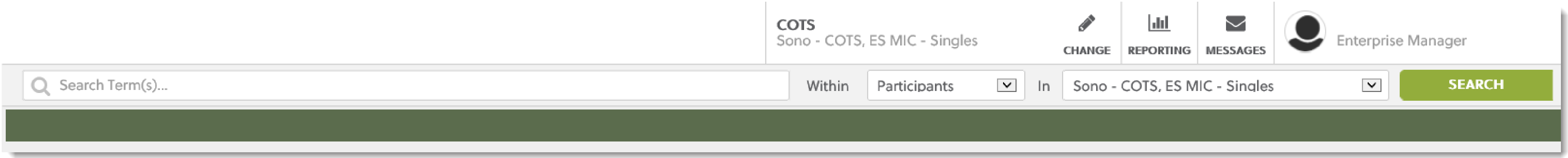
Searching is a two step process

- Quick Search
- Enroll Search

Household

Quick Search

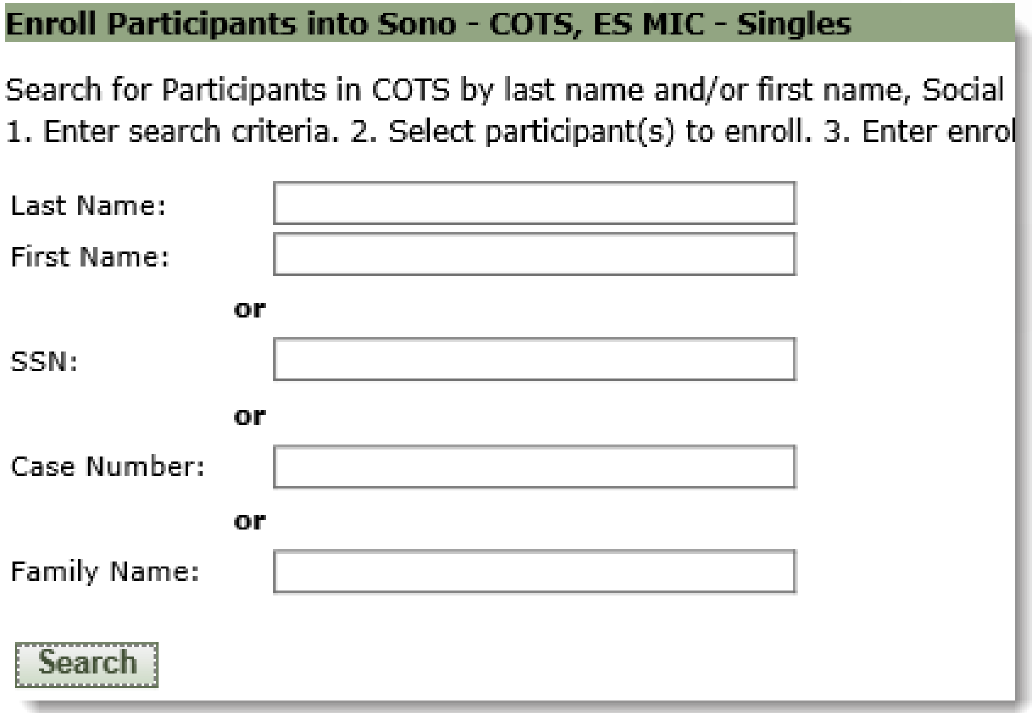
- The Quick Search is used to look for Participants who are already enrolled in the program.
- A blank quick search will return ALL of the participants currently enrolled in the program



Household

Enroll Search

- An Enroll Search looks for participants that are in the Enterprise, but are not currently enrolled in the program.
- This can happen when participants have been dismissed, but come back to the system.

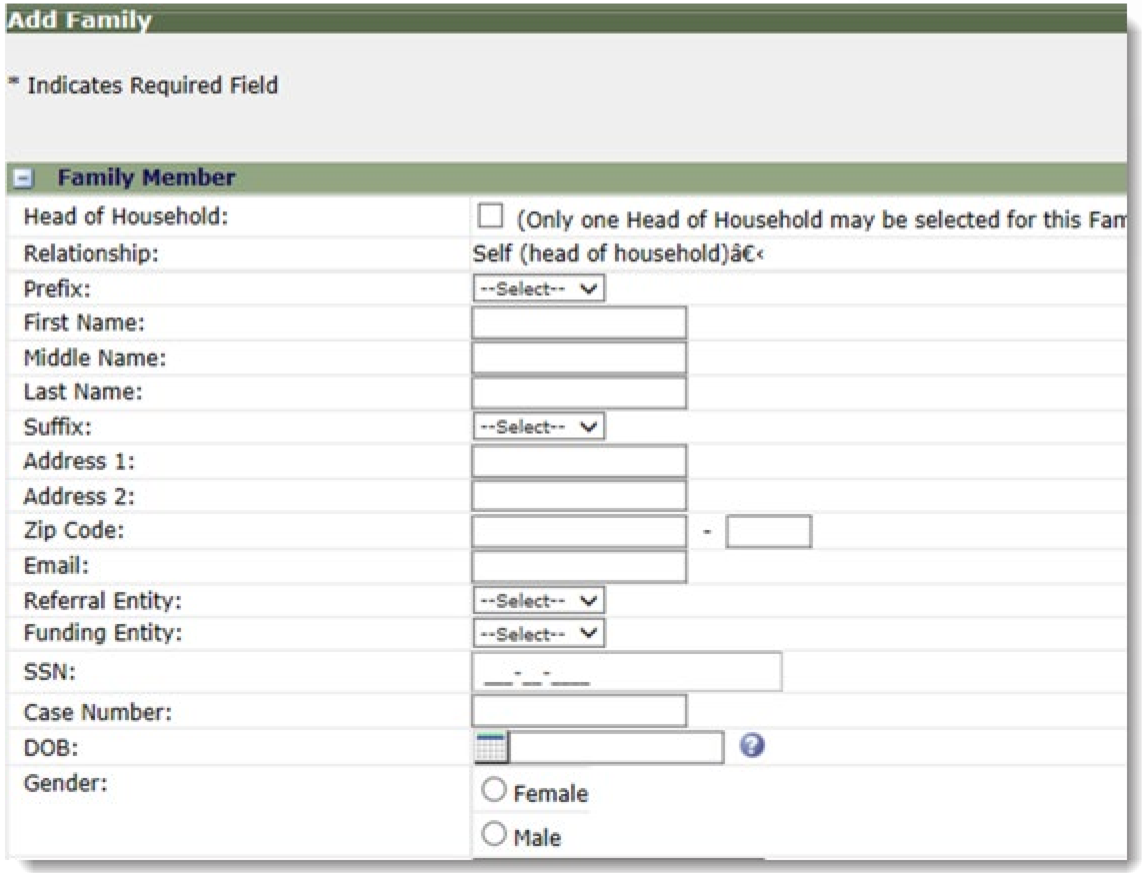


Household

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 Fam
Relationship:	Self (head of household)â€‹
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

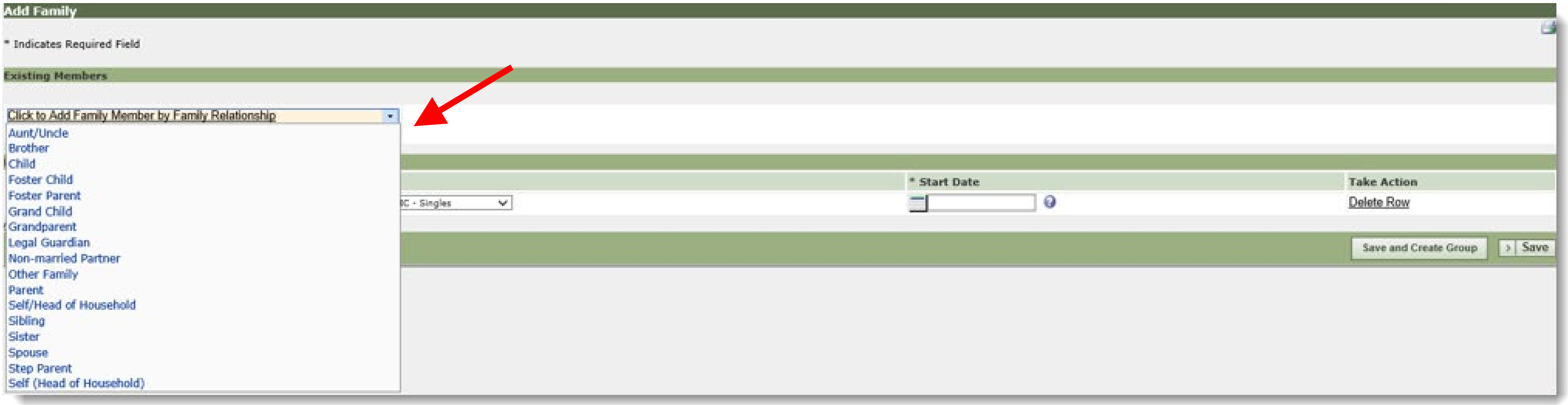
Household

Edit Family Information

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

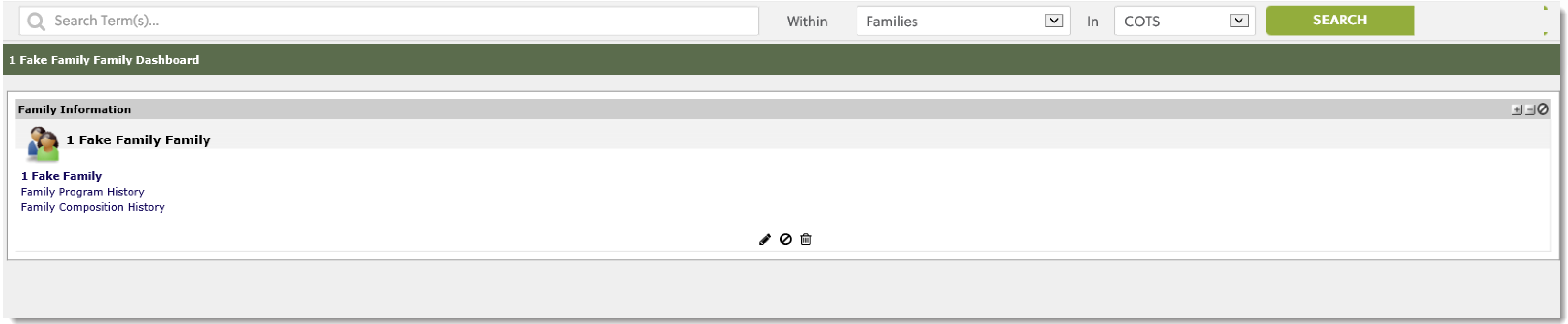
Household

Edit an Exiting Family for adding New Members



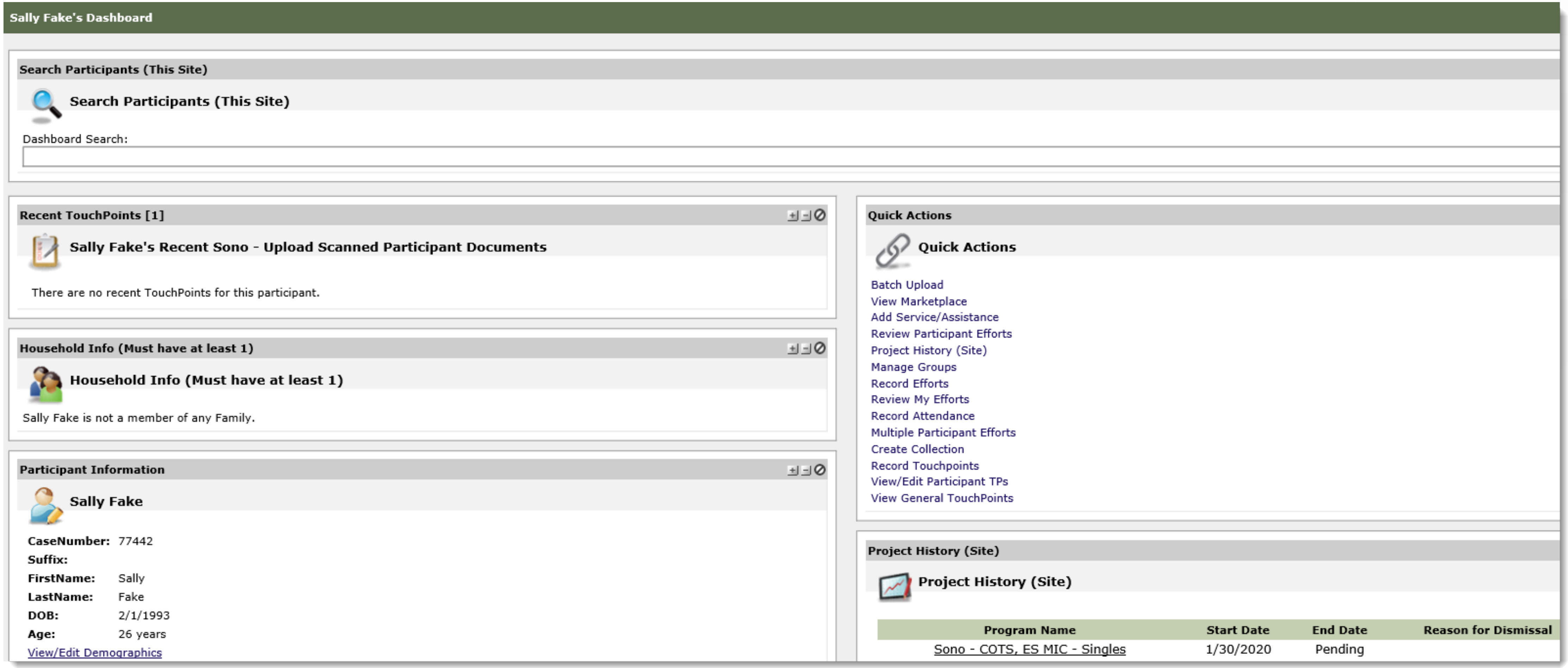
Household

Family Dashboard



Household

Participant Dashboard

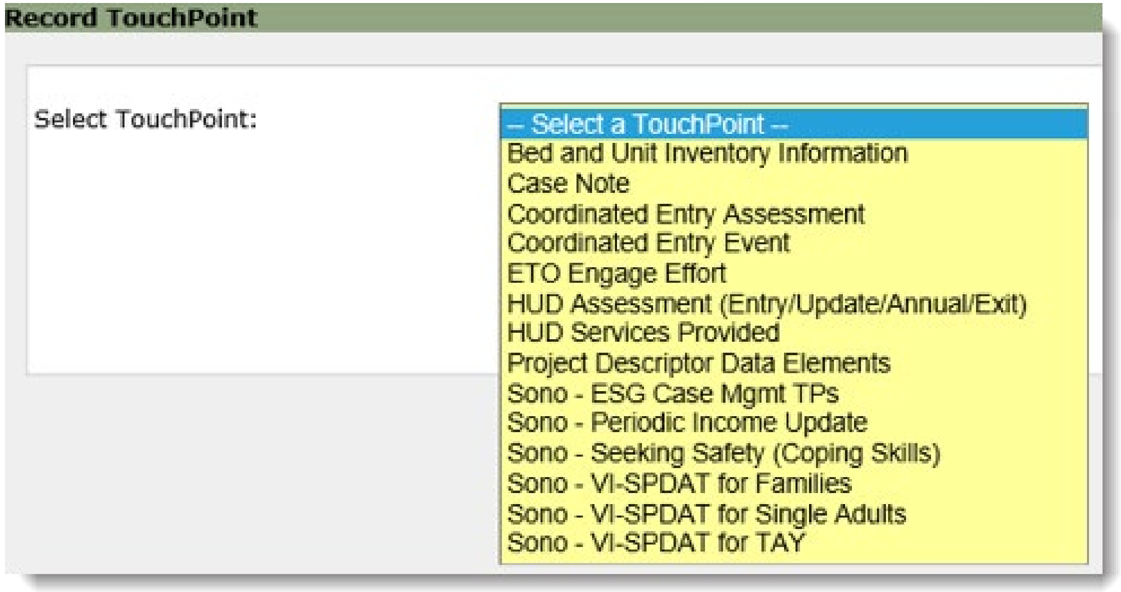


HUD Assessment: Project Entry

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

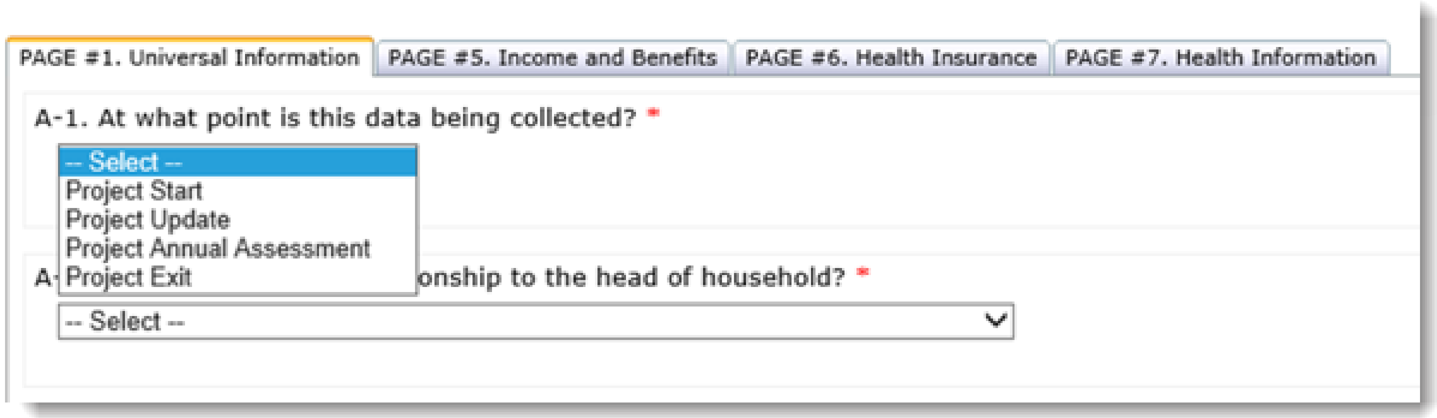
The HUD Assessment is organized into four sections:

- 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

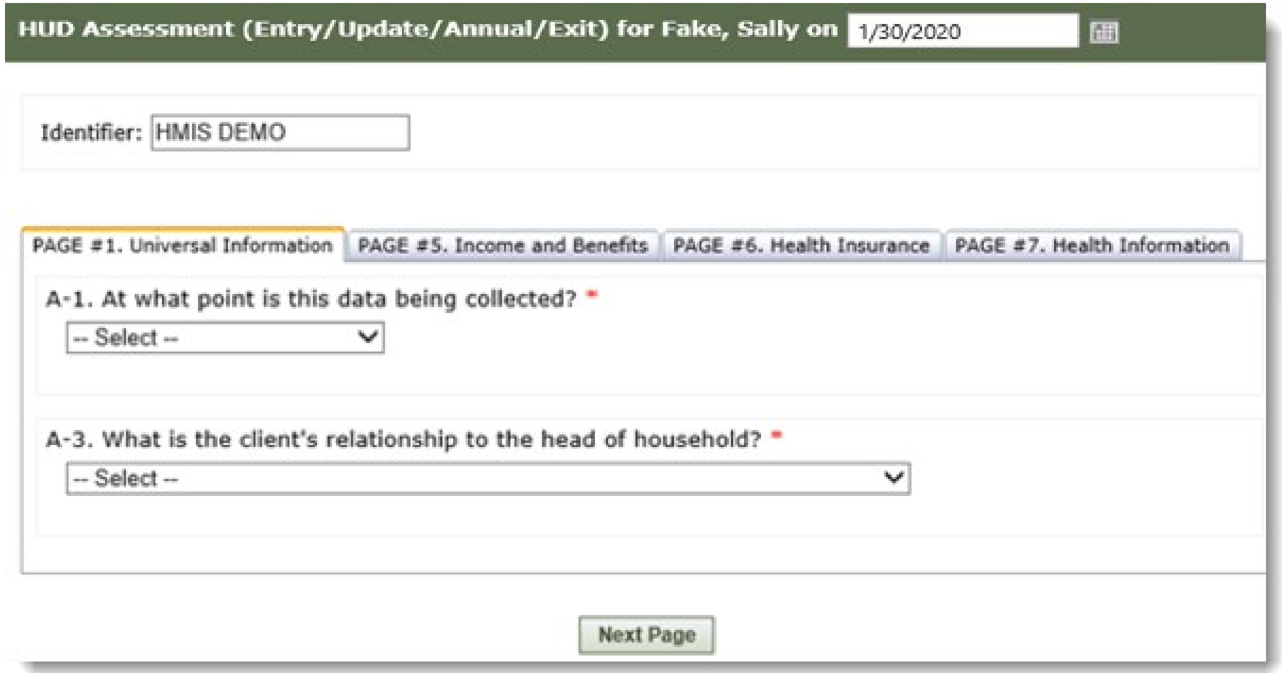
Always take a HUD Assessment

- At <u>EVERY</u> 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

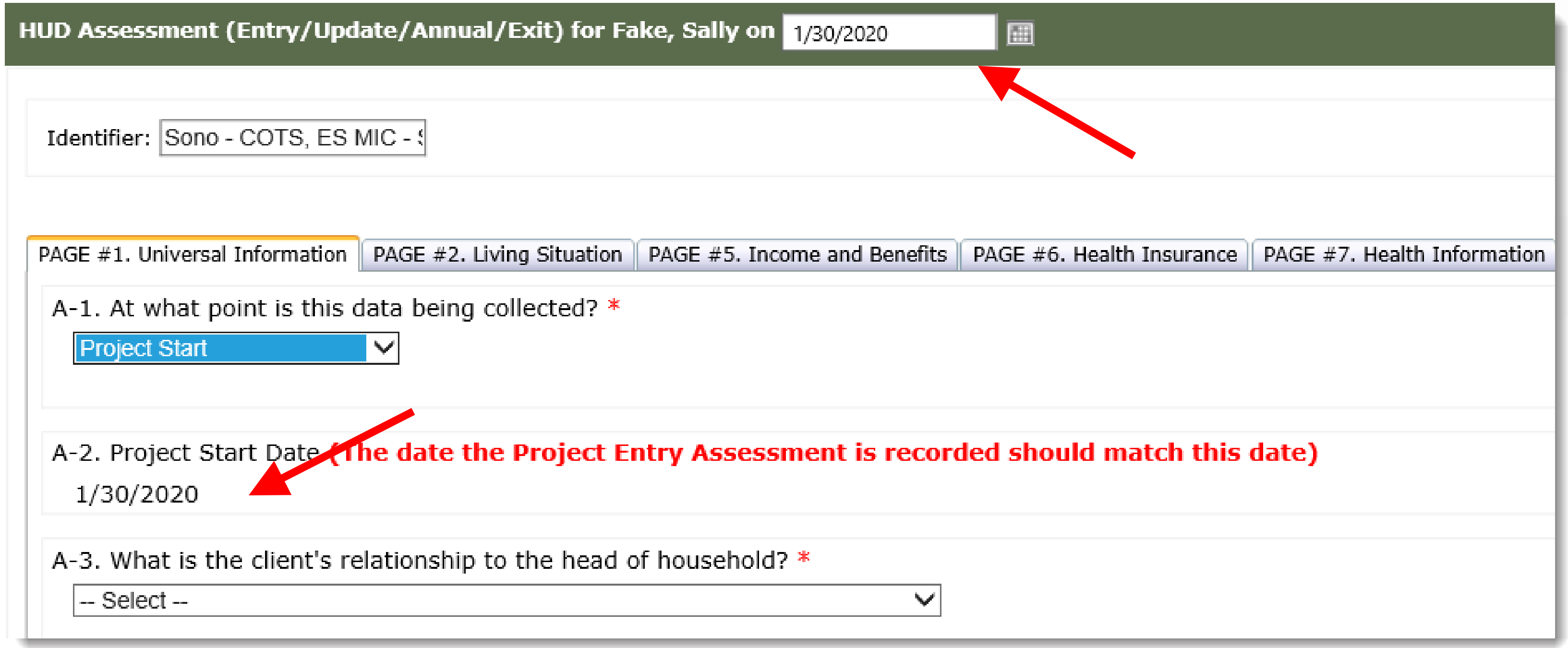
A-5. HUD-assigned CoC code for the client's location (Please enter the CoC code from the question above. If there are multiple CoC codes listed above, please choose the code that links the client to the correct CoC based on the geographic area where the head of household is staying at the time of project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

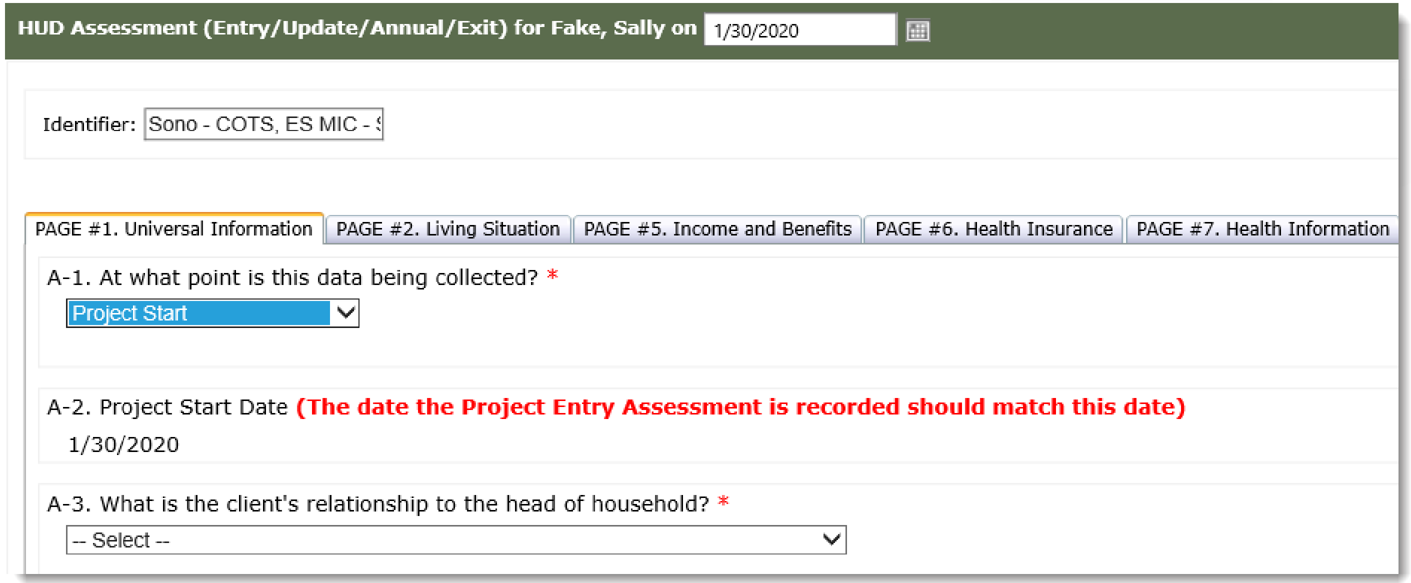


HUD Assessment: Project Entry

Page #1: Universal Information

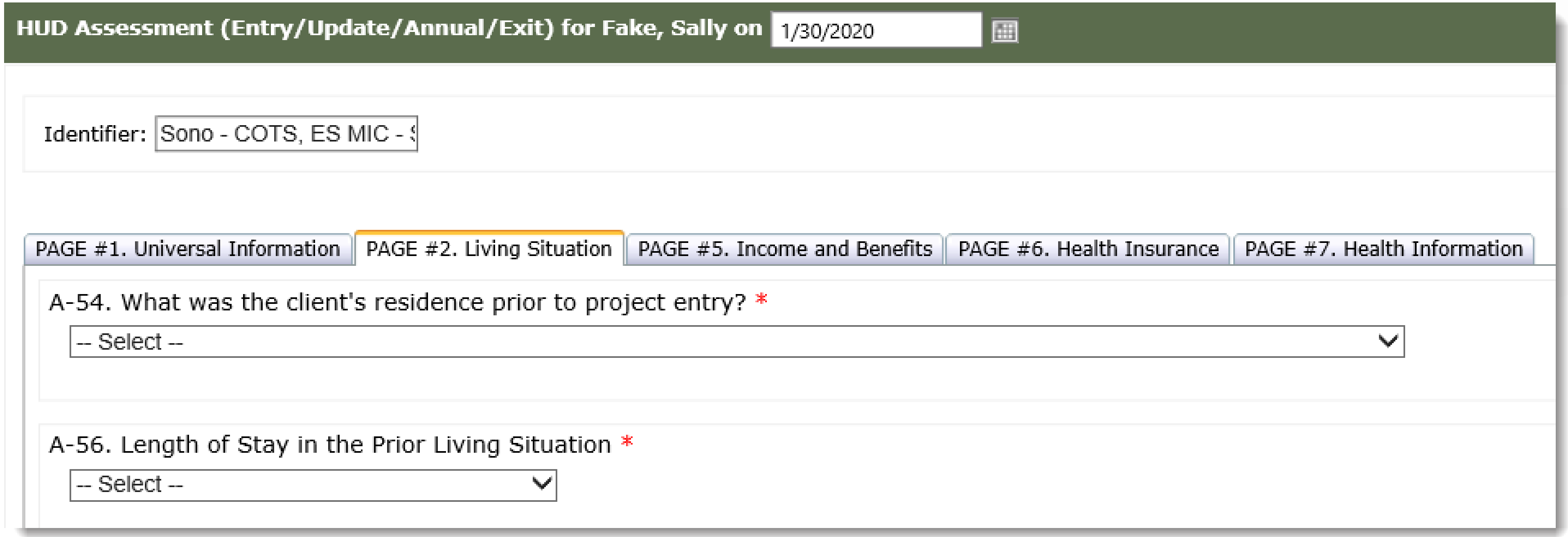
Identifiers

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



HUD Assessment: Project Entry

Page 2: Living Situation



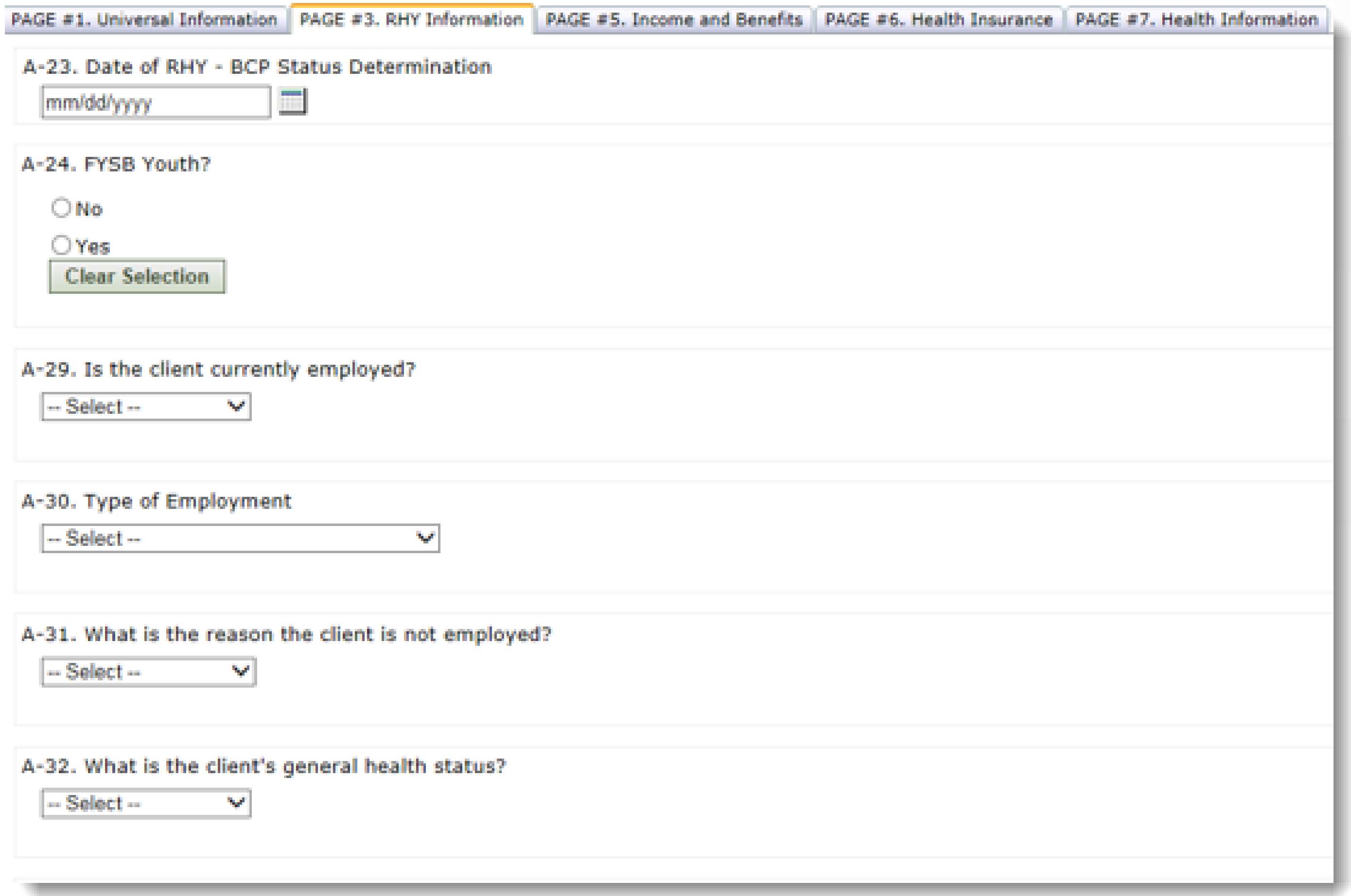
ES/TH VS. PH:

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

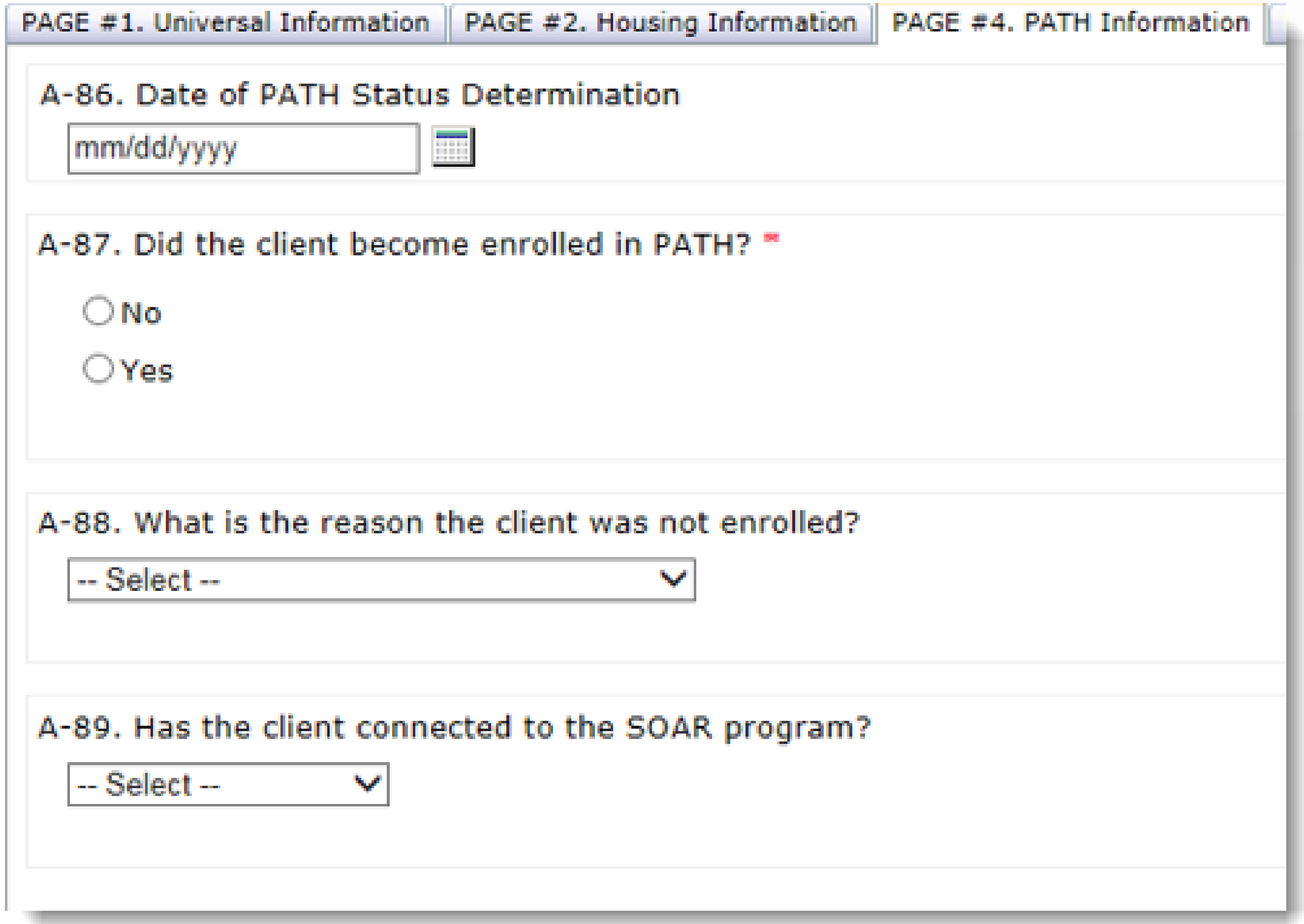
HUD Assessment: Project Entry

Page 3: RHY Information



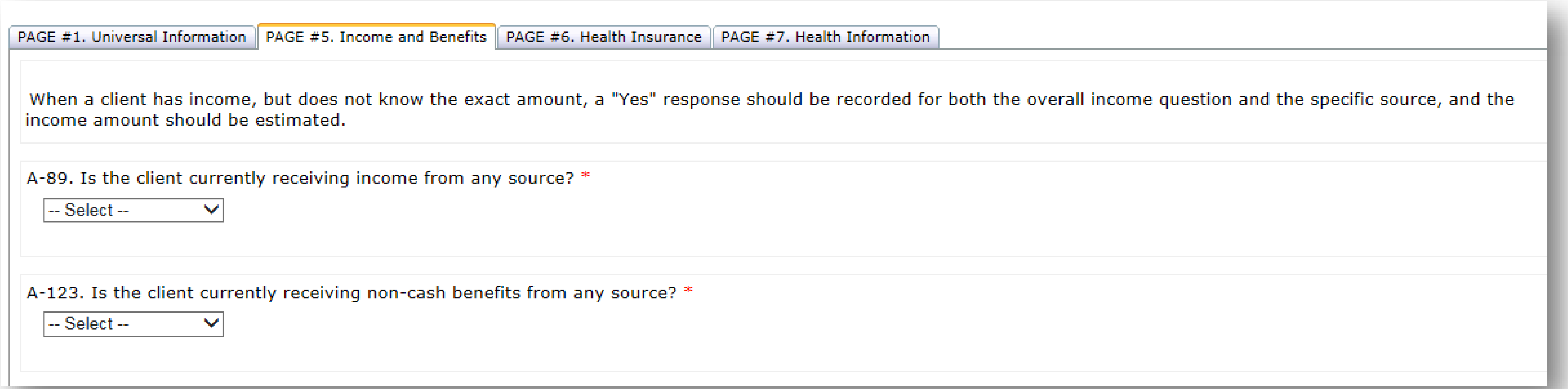
HUD Assessment: Project Entry

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? *

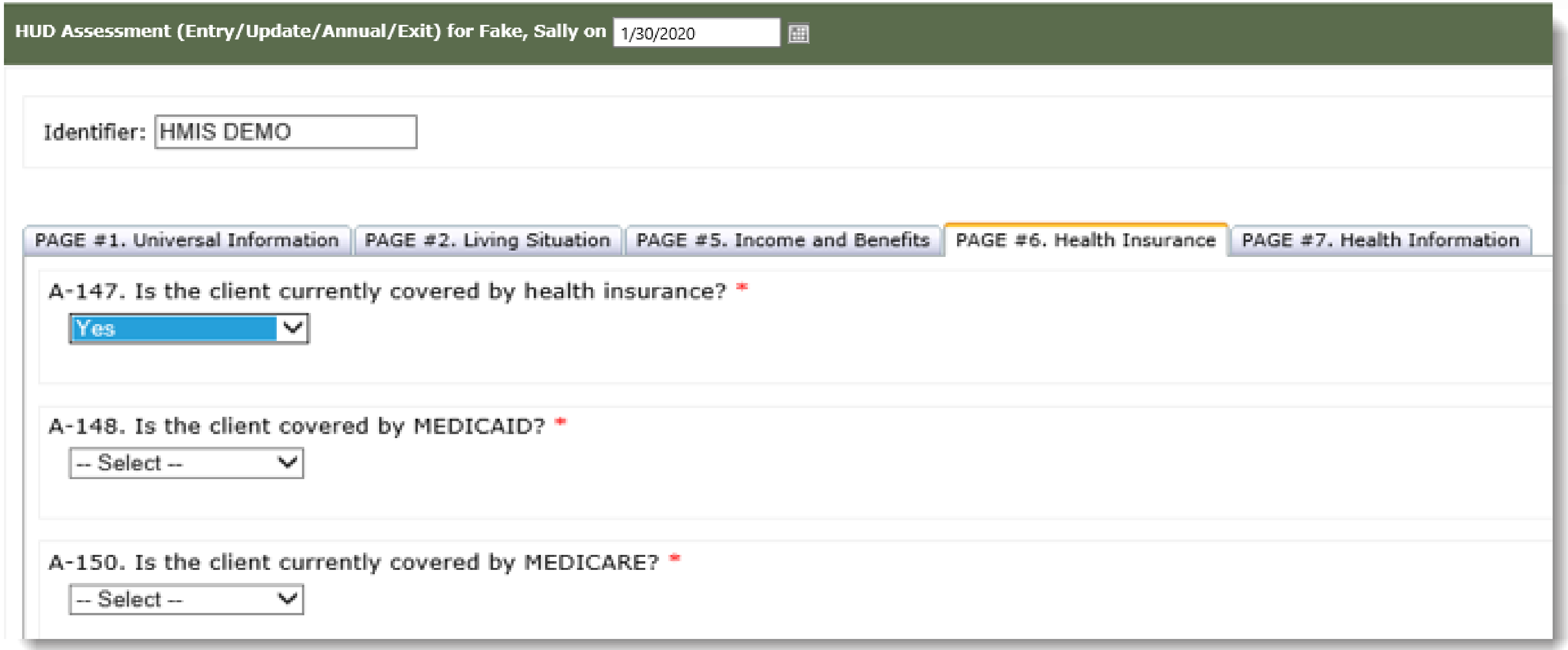
-- Select --

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 (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? *

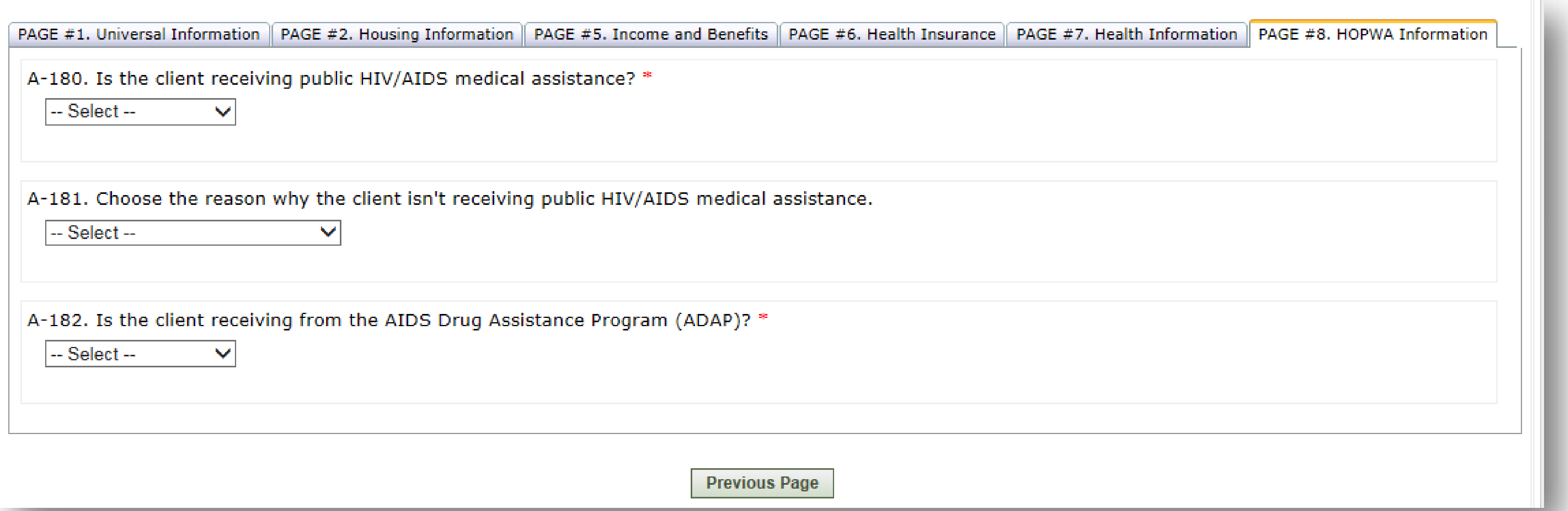
-- Select --

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

-- Select --

HUD Assessment: Project Entry

Page 8: HOPWA Information



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

Check In

Write True or False in the chat in response to each statement.

- James was enrolled in Street Outreach, and had the HUD Assessment at Project Entry recorded. He is now enrolled in Permanent Supportive Housing. He does not need to take another HUD Assessment at Project Entry recorded.

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:

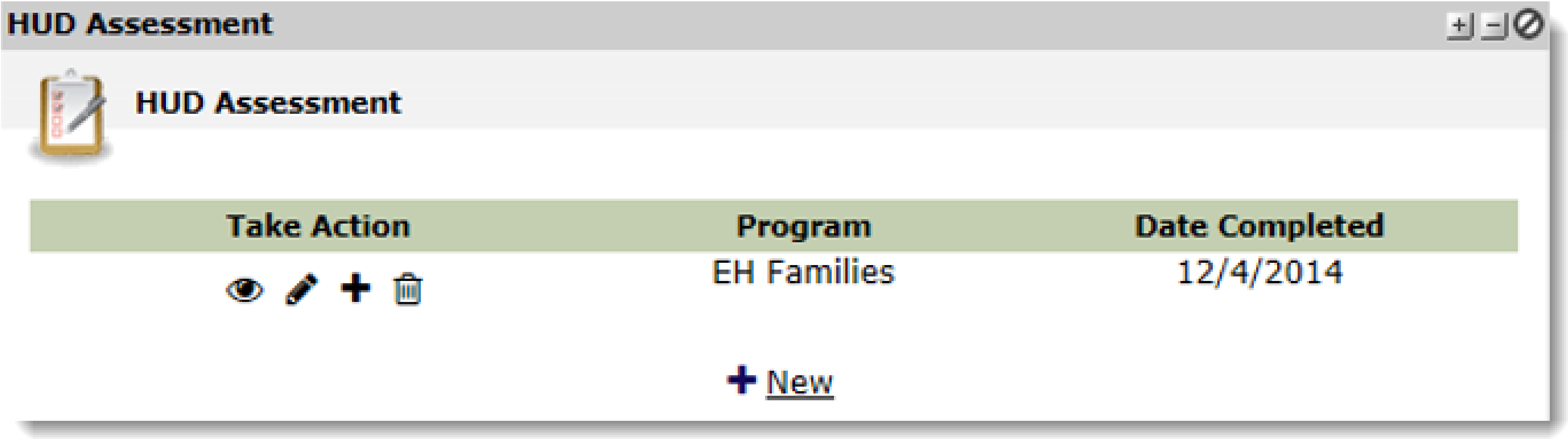
- Step 1: From the Participant Dashboard, choose take New HUD Assessment
- Step 2: Pre populate the responses from the most recent HUD Assessment
- Step 3: For question A-1, Choose Project Update
- Step 4: Update any information that has changed since the form was last recorded and save.

HUD Assessment: Project Update

Step 1: Take a new HUD Assessment

Participant Dashboard > HUD Assessment ETO Part

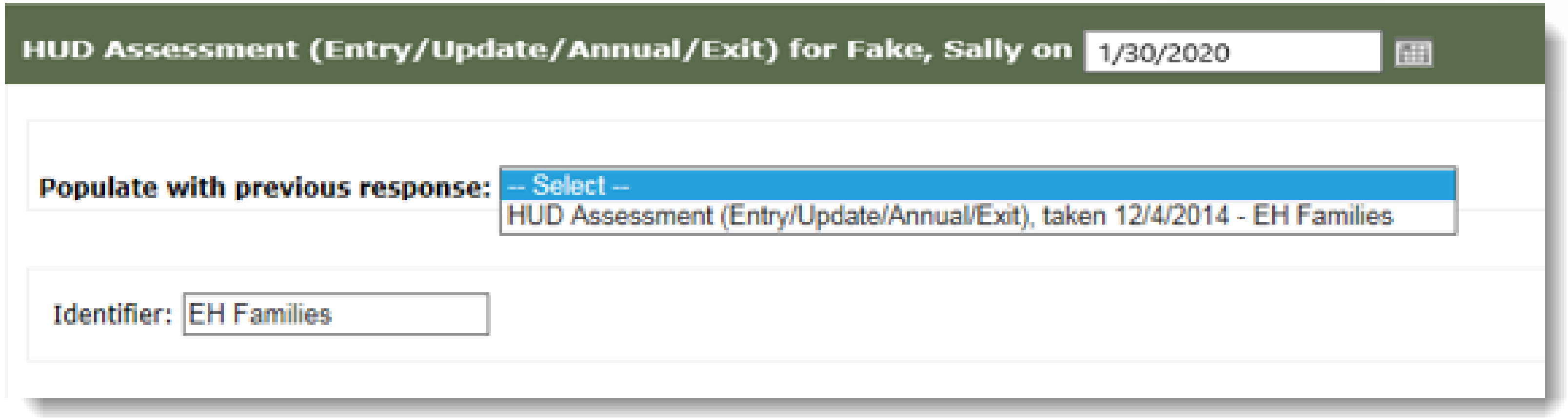
- You should see the HUD Assessment that you completed at Project Entry
- Click New.



HUD Assessment: Project Update

Step 2: Populate with Previous Responses

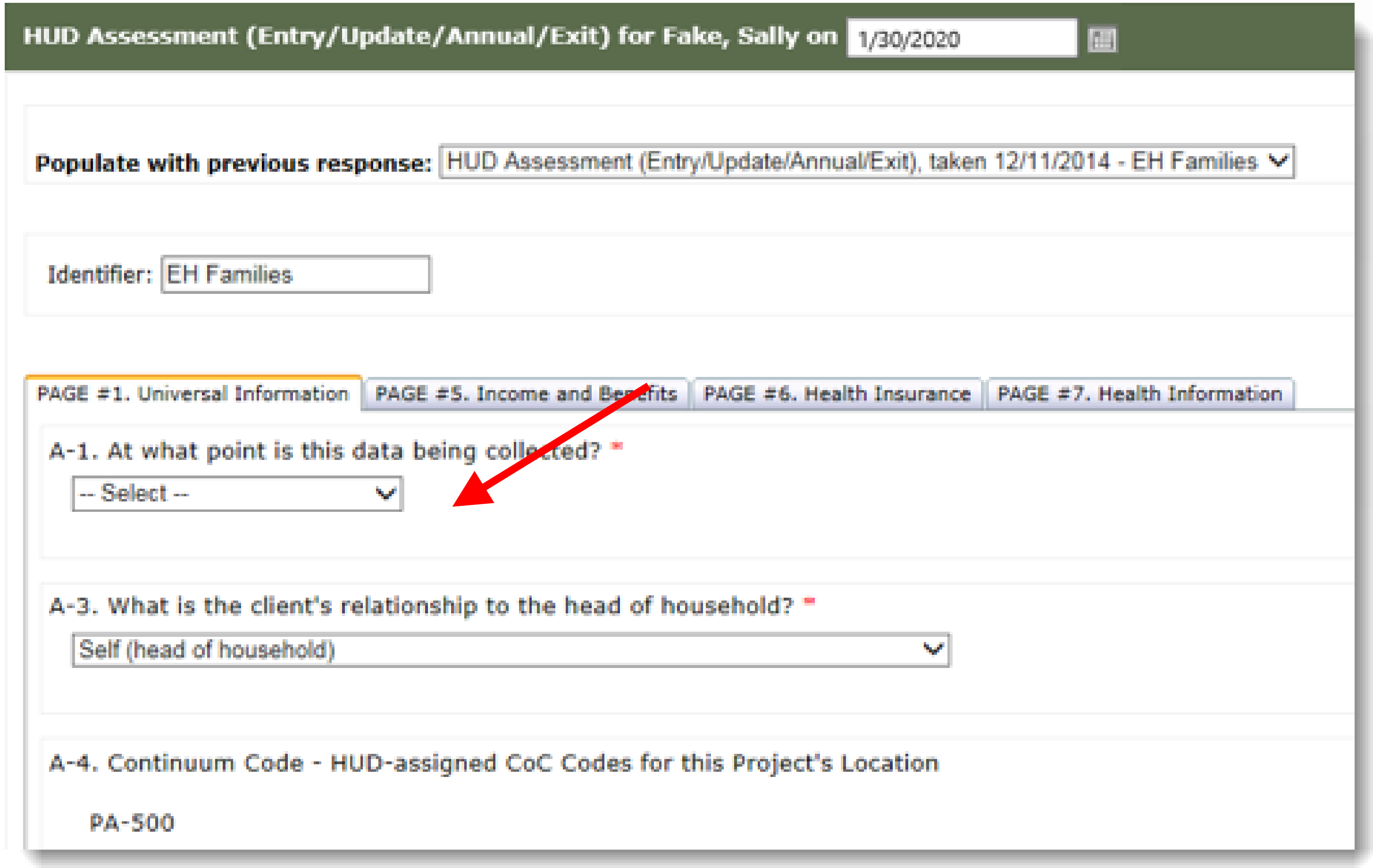
- Choose the most recent data completed in the HUD Assessment (Project Entry) to pre-populate the HUD Assessment: Project Update.
- Responses can also pre-populate into the Annual and Exit Assessments.



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



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 Annual Assessment

HUD Assessment: Project Annual Assessment

A Project Annual Assessment must be taken for <u>EACH</u> 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 Annual Assessment

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 Annual Assessment

Step 3 & 4: Selecting Annual Assessment

- Choose Annual Review from the drop down
- Save updates

Check In

Sarah entered the Transitional Housing program on 3/1/2019. When must her Annual Assessment be taken?

A. Only on 3/1/2020
B. 2/1/2020 to 3/31/2020
C. At any point in 2020

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

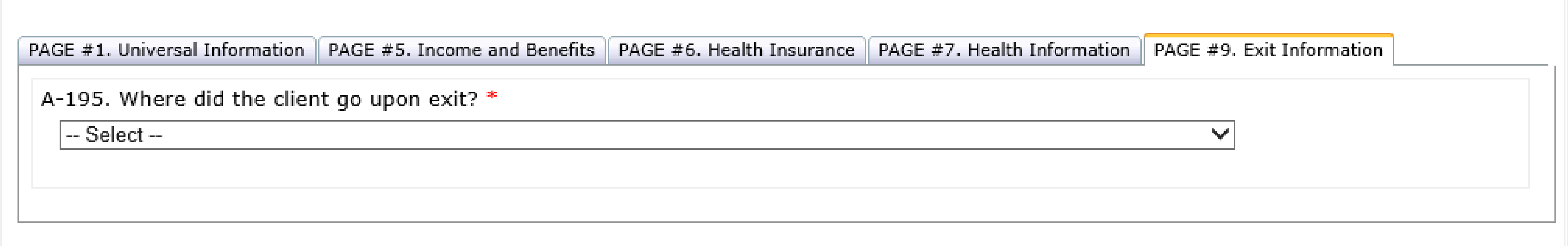
Step 1 & 2: Start the New Assessment & Pre-Populate Previous Responses

- 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.



A Project Exit must be filled out for each family member prior to dismissing from the program.

Check In

Write the answer in the chat in response to each statement.

- What is the minimum number of HUD Assessments that must be recorded for a Participant?

Check In

Write True or False in the chat in response to each statement.

- If one participant of a Household has a HUD Assessment: Project Exit taken, the rest of the Household members do not have to record one.

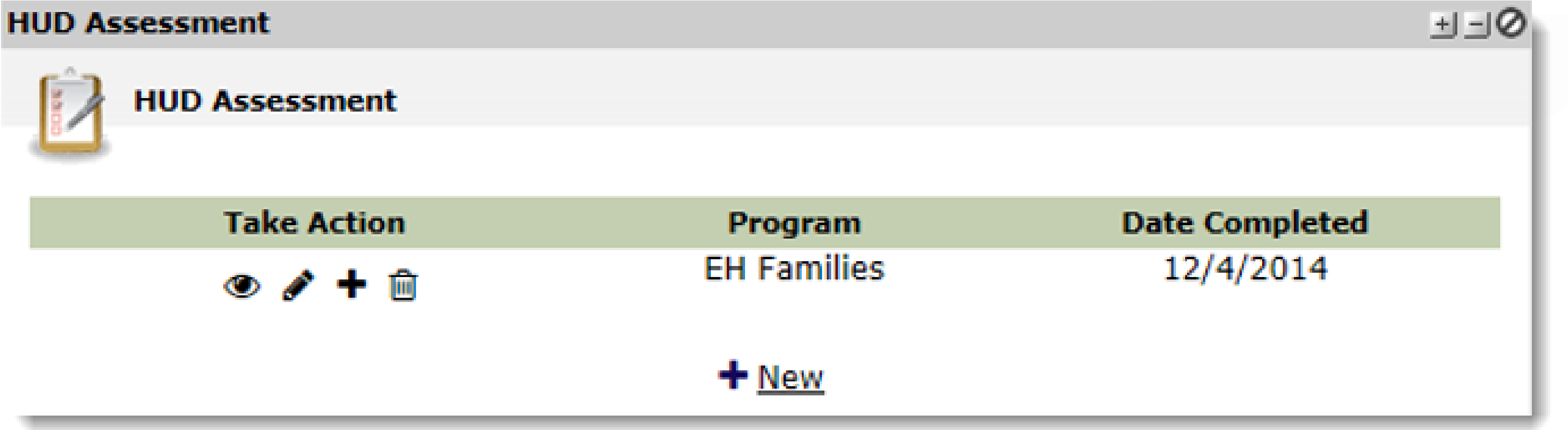
Review and Edit HUD Assessment

Review and Edit HUD Assessment

Reviewing Information

HUD Assessments can be reviewed or edited from the Participant Dashboard.

- Click the pencil icon to edit and the eye icon to view

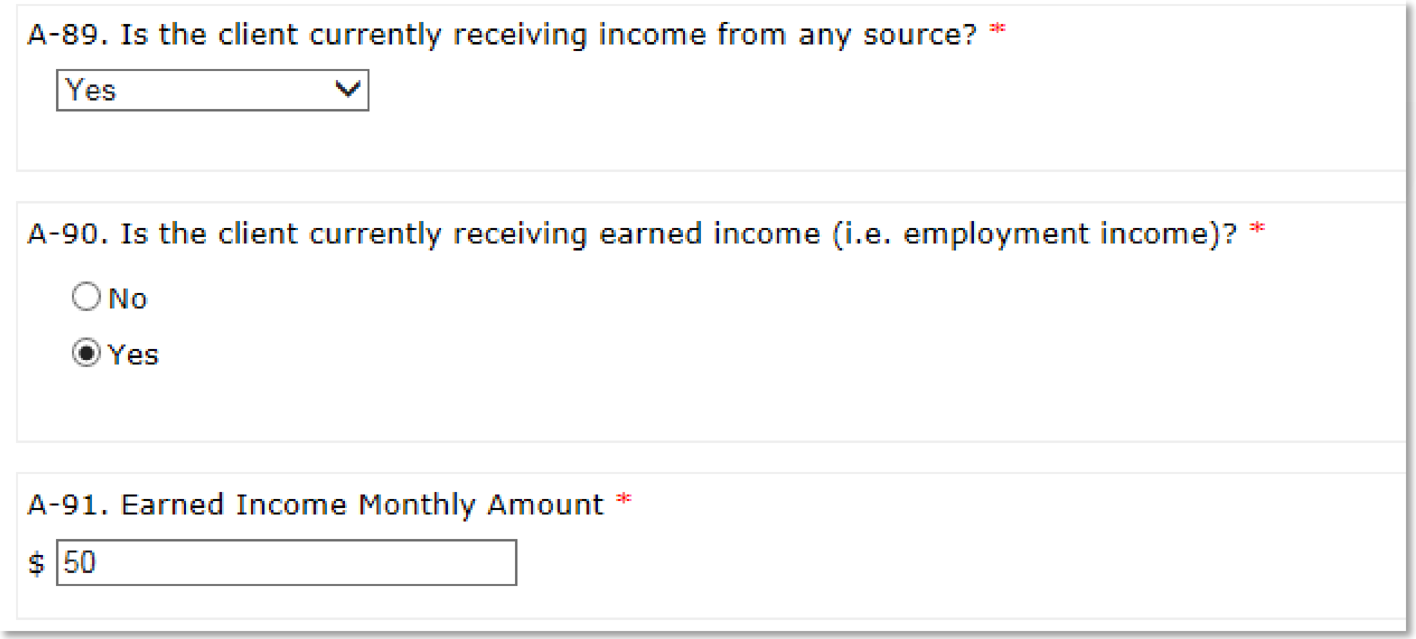


Review and Edit HUD Assessment

Editing Information

Edits should be made to correct incorrect information.

- If information needs to be updated, fill out a Project Update.



Check In

Write your answer in the chat in response to each statement.

- Caseworker Maria is working with the Robertson Household. Three months after they begin receiving services, Ellen Robertson gets a new job that provides the entire Household with Health Insurance. What should Maria do?
    A. Complete Project Update Assessment
    B. Use pencil Icon to edit information

Check In

Write True or False in the chat in response to each statement.

- The Robertson Household Received Services from the Red Shield program and the HUD Assessment: Project Entry was recorded for each member of the household. This means that they do not need to record a HUD Assessment: Project Entry when they are enrolled into Transitional Housing program six months later.
- The four members of the Robertson Household are receiving services from the Transitional Housing Program. Brett Robertson is the Head of Household, and once his HUD Assessment: Project Entry is recorded, one does not need to be recorded for his wife, Ellen.

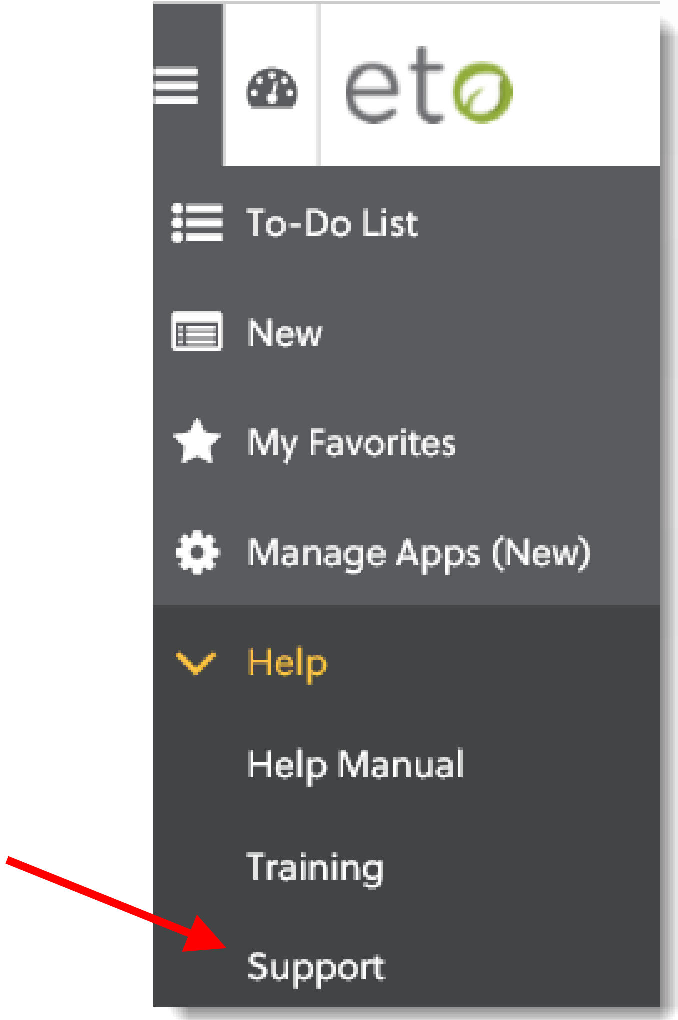
Check In

Write True or False in the chat in response to each statement.

- Jerry Robertson is the adult child of Brett and Ellen. He gets his own apartment, and will no longer be receiving services from the Transitional Housing program. Because the whole Household is not leaving the program, Caseworker Maria does not have to take an HUD Assessment: Project Exit for him.

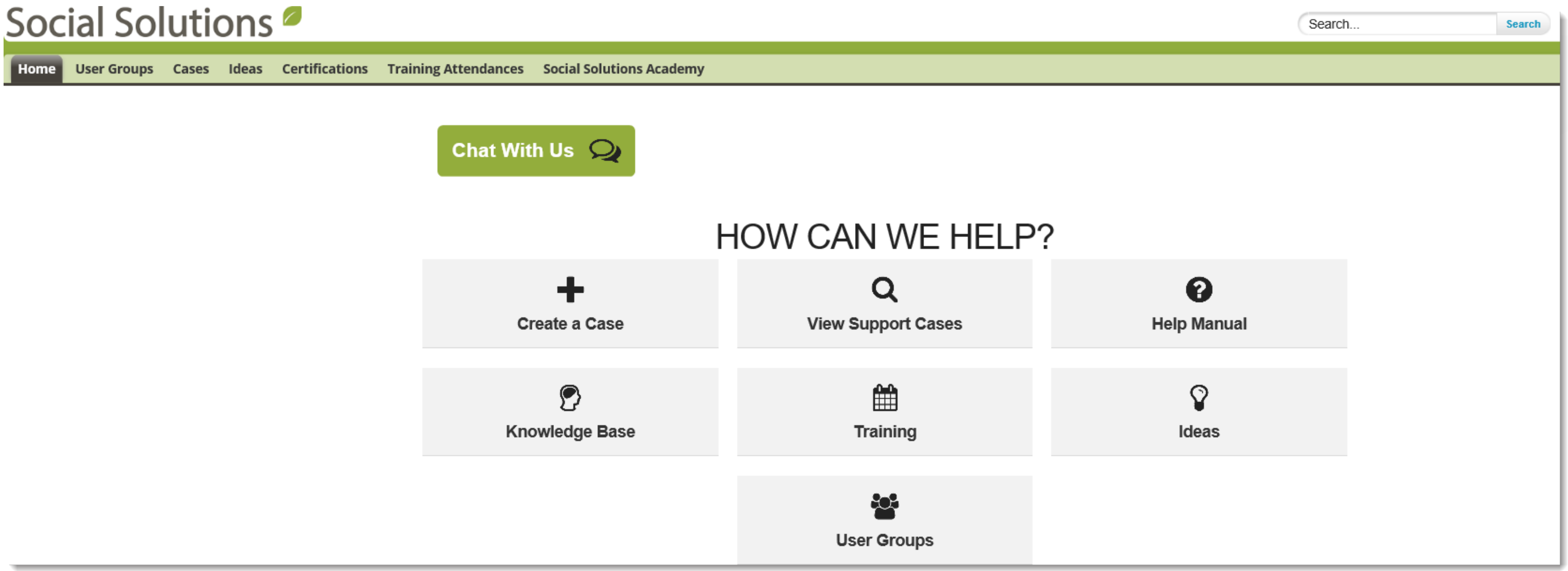
Accessing Customer Support

Select Support from the Navigation Bar



Accessing Customer Support

Portal Home Page



Welcome to Office Hours!

- Please use this time to

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!

Thank you for joining us!

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