

Rapid Re-Housing HMIS Checklist

Note: All Services, Case Notes and Assessments should be completed within the Program Enrollment and NOT at the Profile level for the Client.

1. Process Referral (prior to a face-to-face meeting)

- Cases will be assigned by a supervisor and appear in a case worker's Caseload screen

2. Enrollment

- Verify and update the **Profile** screen of all household members.
 - On right side of Client Profile, ensure all household members should be enrolled in Rapid-Rehousing program
 - Click on "Manage" to update household composition and remove any member who will not be enrolled
 - Click "Edit" next to household members who need to be removed
 - Toggle "Exited Household"
 - Add correct date. If unknown, enter Program Enrollment date
- Complete **Rapid Rehousing** program enrollment
 - Under *Include group members*, toggle each household member.
 - If a household was enrolled in any other program less than 90 days ago, enrollment data will automatically populate when creating an your program enrollment
 - Work with the client to ensure enrollment data is accurate
 - Project Start Date = date of initial engagement
 - **Note:** leave **Housing Move In** date blank until a household has secured permanent housing and signed a lease. You will add this later.
 - Relationship to Head of Household = select for each household member
 - Prior Living Situation = client provides this information directly; determines chronic homelessness status
 - Disabling Conditions and Barriers = selecting "Yes" for any Condition means "Yes" needs to be selected for "Disabling Condition" field
 - Domestic Violence Victim/Survivor = if "Yes" ensure profile is de-identified (see Your Way Home Operations Manual)
 - Monthly Income and Sources = enter all sources of formal and informal Income amounts
 - Receiving Non-Cash Benefits = Non-Cash Benefits means regular, recurrent benefits; see sources for "Other Non-Cash Benefits"
 - Covered by Health Insurance = if "Yes", make correct selection
 - Frequently selected options
 - Medicaid = federal and state insurance for income-limited households

- Medicare = federal insurance for adults ages 65+ or under 65 and have a disability, no matter your income
 - State Health Insurance for Adults = Affordable Care Act marketplace
- Add the appropriate **Services** based on what is provided to the household
 - To add a Services (from Client Profile)
 - Click Programs; Open Program “Rapid Rehousing”
 - In Program Enrollment, click on “Provide Services”
 - To expand list, select down arrow on right
 - Select the appropriate Service, fill in appropriate fields & click “Add Service”
 - Service Start Dates should be the same date as the Project Start Date
 - Services must include, at minimum, case management
 - For payment related services (like rental payments): Expense Amount, Expense Date and Funding Source is needed
 - Add payment related services monthly or as funding is distributed
 - Upload **files** as appropriate, including the signed Program Agreement, current Housing Stability Plan, monthly budget(s), etc.
 - Click Programs; Open Program “Rapid Rehousing”
 - Click on “Files” from Program Enrollment
 - Click “ADD FILES” on the right side of the screen
 - Select the appropriate category.
 - If the correct option isn’t listed, select “Other” and add a file name
 - Remember: Other providers have access to these files and can see the content of them, unless they’re marked “Private”
 - Files should be marked private if they are meant for internal agency use only

3. Records Management (while client is a project participant)

- Add case notes to Program Enrollment
 - Case notes should be added after each interaction with a client and outline what was happened during the meeting
 - Remember: Other providers have access to your notes and can see the content of them.
 - Click Programs; Open Program “Rapid Rehousing”
 - Click on “Notes” from the Program Enrollment
 - Click “ADD NOTE” on the right side of the screen
 - Title= Short summary of meeting content
 - Category = choose the most appropriate category
 - **Note:** data cannot be pulled form notes for future use or analysis. They are only for informational purposes.

- **Annual Assessments** should be completed within 30 days before or after a client has been enrolled in a program for ONE YEAR
 - Click Programs; Open Program “Rapid Rehousing”
 - Click on “Assessment” from Program Enrollment
 - Find Annual Assessment at the bottom of the list and click “START”
 - Toggle each Household Member and click “Add Annual Assessment”
 - Update the information on the Assessment as thoroughly as possible
 - **Note:** these data elements are the same as Program Enrollment
 - See Enrollment instructions above for more information
 - Click “Save & Next” to complete the second assessment
 - Complete Annual Assessments for each household member
 - Click “Save & Close” when done
 - **Note:** Clients must be actively enrolled in a program in order to add an Annual Assessment
 - Re-open clients if assessments need to be added after clients are discharged

4. Move-In, Monthly Rent, Utilities, and Other Payments

- Add **Housing Move-In Date** data element once household has moved into permanent housing
 - Click Programs; Open Program “Rapid Rehousing”
 - Click on “Enrollment” from Program Enrollment
 - Add “Housing Move In Date”
 - Housing Move In Date = the day the household begins sleeping at their new home
- Add payment related **Services** (like rental payments):
 - Click Programs; Open Program “Rapid Rehousing”
 - Expense Amount, Expense Date and Funding Source is needed
 - Add payment related services monthly or as funding is distributed
 - Add additional **Services** as appropriate for any furniture or other items purchased for move-in
 - For monthly rent and utility payments, add a **Rental Assistance** or **Utility Payment** service each time a payment is made on behalf of the client (do not include client portion)
- Complete a new **SPDAT** assessment
 - **Note:** this should remain in their files but should not be uploaded into their Clarity profile

7. Project Exit

- Exit from **Rapid Rehousing** program when appropriate:
 - The household is able to maintain the rent in their current home independently or using other government subsidies

- The household violated the terms of the program and is no longer to remain enrolled
- The household has received 24 months of rental assistance
- To Exit from a program-
 - From Client Profile click “Programs”
 - Open Program “Rapid Rehousing”
 - Click “Exit” on the top right of the page.
 - Update the information on the Exit page as thoroughly as possible
 - **Note:** these data elements are the same as Program Enrollment
 - Exit Destinations= Where the household is going now
 - “Staying with Friends/Family- Permanent Tenure”= staying somewhere longer than 7 days
 - Do not answer “Data Not Collected.” If unable to follow up with a client, select “No Exit Interview Completed” instead
- Modify the end date for all open services (listed at the bottom of Exit screen)