



Sonoma County HMIS End User Training

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

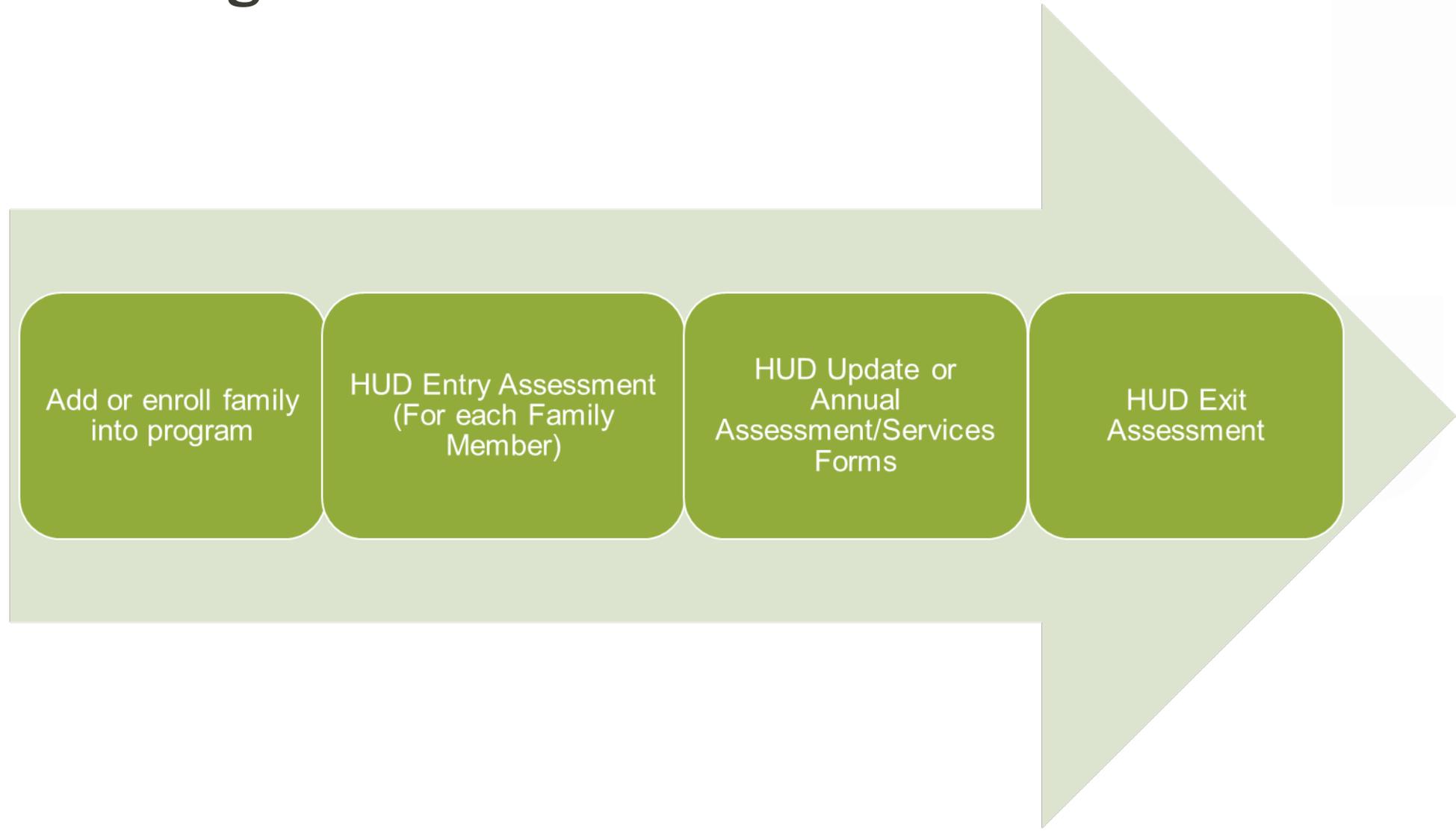
- **Participant** refers to the target population that you are serving.
- **Household** refers to participants who live together. A household is also created for a single participant for HUD reporting.
- **TouchPoints** refers to forms, used to capture information and measure progress (Pre/Post tests).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

Basic Navigation

The screenshot displays the eto Enterprise Manager interface. On the left is a dark sidebar with navigation items: To-Do List, New, My Favorites, Manage Apps (New), Help, Participants, Assessments & History, and Bed Stays. The top header includes the eto logo, the current site name 'COTS Sono - COTS, ES MIC - Singles', and user controls for 'CHANGE', 'REPORTING', 'MESSAGES', and 'Enterprise Manager'. Below the header is a search bar with the text 'Search Term(s)...' and a 'SEARCH' button. The search scope is set to 'Within Participants' in the 'Sono - COTS, ES MIC - Singles' site. The main content area shows a search results window titled 'Search Participants (This Site)' with a search icon and a 'Dashboard Search:' input field.



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

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".



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.

Enroll Participants into Sono - COTS, ES MIC - Singles

Search for Participants in COTS by last name and/or first name, Social
1. Enter search criteria. 2. Select participant(s) to enroll. 3. Enter enroll

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

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.

The screenshot shows a web form titled "Record TouchPoint". On the left, there is a label "Select TouchPoint:" followed by a large empty text box. On the right, a dropdown menu is open, displaying a list of touchpoint options. The top of the dropdown menu has a blue header with the text "- Select a TouchPoint -". The list of options includes:

- 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'. The main content area displays a question: 'A-1. At what point is this data being collected? *'. Below the question is a dropdown menu that is currently open, showing the following options: '-- Select --', 'Project Start', 'Project Update', 'Project Annual Assessment', and 'Project Exit'. Below the dropdown menu, there is another question: 'A-1. Relationship to the head of household? *' followed by another 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

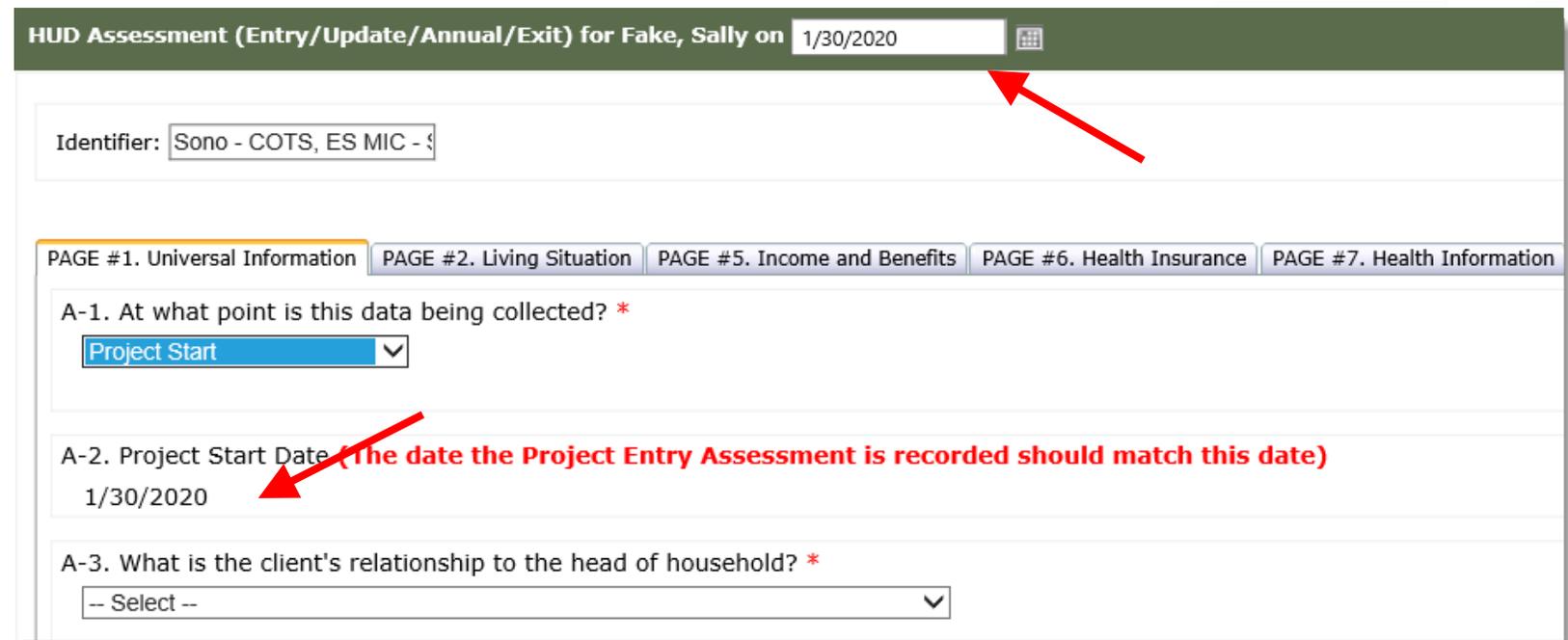
A-5. HUD-assigned CoC code for the client's location (Please enter the CoC code from the question above. If there are multiple CoC codes listed above, please choose the code that links the client to the correct CoC based on the geographic area where the head of household is staying at the time of project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

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

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	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.



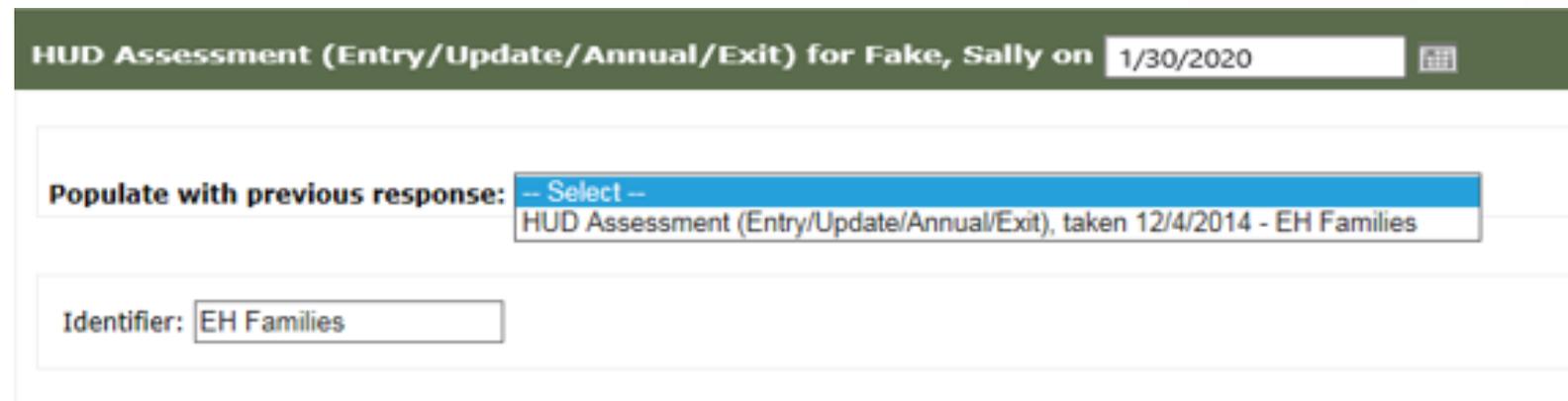
Take Action	Program	Date Completed
   	EH Families	12/4/2014

[+ 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.



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

Populate with previous response: -- Select --
HUD Assessment (Entry/Update/Annual/Exit), taken 12/4/2014 - EH Families

Identifier: EH Families



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



***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 **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 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

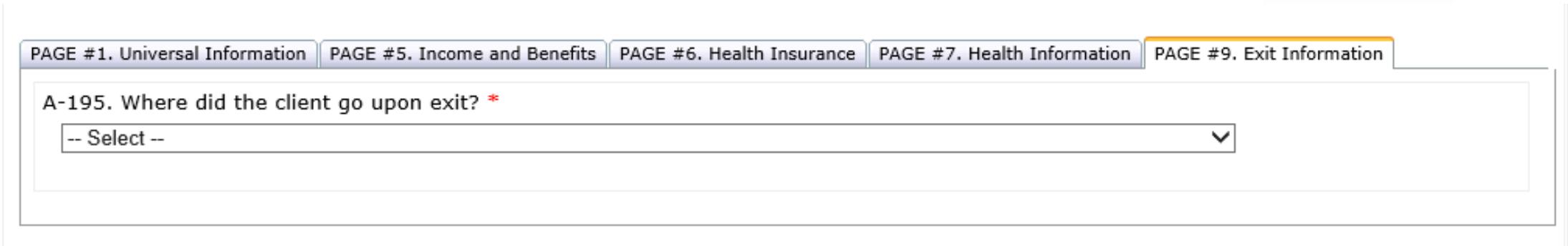
Step 1 & 2: Start the New Assessment & Pre-Populate Previous Responses

- 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.



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 currently selected and highlighted with an orange border. Below the tabs, the form contains a question labeled 'A-195. Where did the client go upon exit? *'. Underneath the question is a dropdown menu with the text '-- Select --' and a downward-pointing arrow icon.



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



HUD Assessment

HUD Assessment

Take Action	Program	Date Completed
   	EH Families	12/4/2014

[+ New](#)



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.

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

Yes ▾

A-90. Is the client currently receiving earned income (i.e. employment income)? *

No

Yes

A-91. Earned Income Monthly Amount *

\$ 50



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.

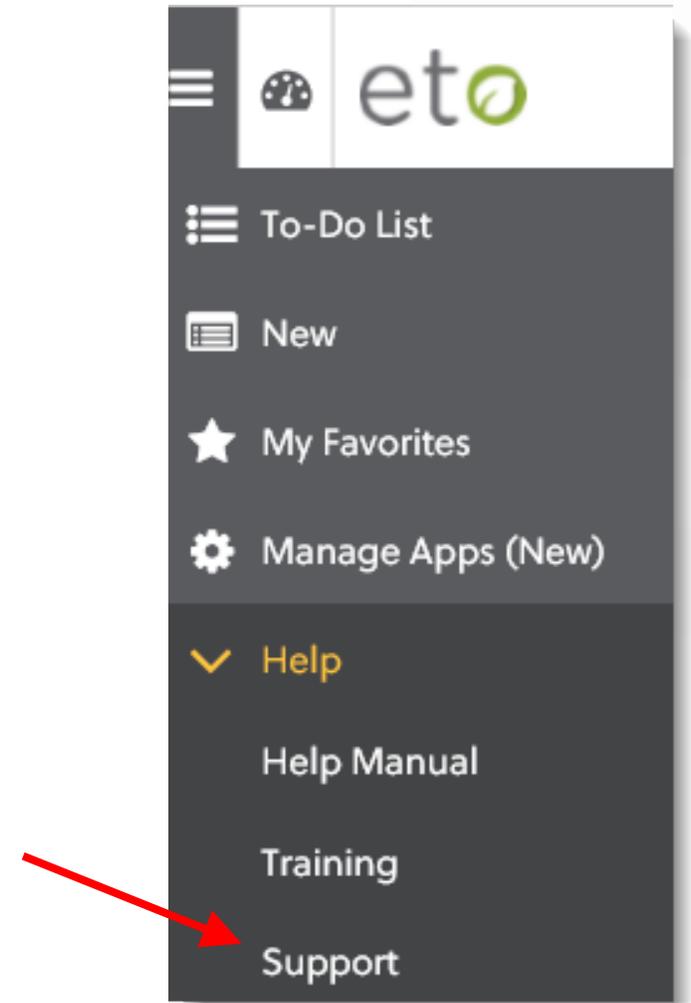
- Jerry Robertson is the adult child of Brett and Ellen. He gets his own apartment, and will no longer be receiving services from the Transitional Housing program. Because the whole Household is not leaving the program, Caseworker Maria does not have to take an HUD Assessment: Project Exit for him.





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Select Support from the Navigation Bar





Accessing Customer Support

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View Support Cases



Help Manual



Knowledge Base



Training



Ideas



User Groups



Welcome to Office Hours!

- Please use this time to

ASK QUESTIONS ABOUT FUNCTIONALITY

ASK TRAINER TO REDO A DEMO

ASK REAL-LIFE APPLICATION QUESTIONS



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