



## **Homelink Voucher CE Project Enrollment and Homelink Voucher Application Submission Process Guide and Job Aid**

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## Homelink Voucher CE Project Enrollment and Homelink Voucher Application Submission Process Guide and Job Aid

### Process Guide

<b>Eligibility</b>	<p><a href="#">Click here</a> for a description of each voucher program with eligibility information.</p>
<b>How to Apply</b>	<ul style="list-style-type: none"> <li>• Application packets are accepted by agency staff only.</li> <li>• Must obtain a referral packet by requesting from <a href="mailto:vouchers@sarahomeless.org">vouchers@sarahomeless.org</a>.</li> <li>• Complete Homelink Voucher CE Enrollment in HMIS</li> <li>• Upload Voucher Application Packet             <ul style="list-style-type: none"> <li>○ <i>Please note all applications must be filled out electronically and printed for the client/staff signature. Signatures must be handwritten, or SAHA will not accept the application.</i></li> <li>○ <i>Please ensure to select the correct voucher project when submitting the application (Form FHP-7221).</i></li> </ul> </li> <li>• <b><i>Please Note: Referral packets submitted without the completed Homelink Voucher CE enrollment will not be processed.</i></b></li> </ul>
<b>Application Processing (SARAH)</b>	<ul style="list-style-type: none"> <li>• SARAH will acknowledge receipt of application within 48 business hours of Homelink Voucher CE enrollment.</li> <li>• SARAH will review packets within five business days of enrollment, verify eligibility, homelessness status, and completeness of application             <ul style="list-style-type: none"> <li>○ Applications needing corrections will require additional time for review and submission to SAHA.</li> <li>○ Corrections must be completed and submitted to SARAH within 5 business days.</li> </ul> </li> </ul>
<b>Correct Email Template for Submitting Corrections</b>	<ul style="list-style-type: none"> <li>• Please use the below for the email subject when submitting applications or corrections.             <ul style="list-style-type: none"> <li>○ Voucher Program (i.e., EHV) Application- HMIS ID#, Staff Name/Agency</li> <li>○ Voucher Program (i.e., FRP) Application Corrections- HMIS ID#, Staff Name/Agency</li> </ul> </li> </ul>



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<b>Submitting Applications to SAHA/HABC</b>	<ul style="list-style-type: none"> <li>Once Application has been reviewed and vetted, application packet is submitted to SAHA/HABC.</li> <li>Submitting Agency Case Manager will be CC'd on email submission to Housing Authority. There is no action required of submitting CM.</li> </ul>
<b>SAHA EHV Application Process</b>	<ul style="list-style-type: none"> <li>Once SAHA/HABC receives the referral from SARAH, it is reviewed to ensure all information is documented correctly. If correct, applicant information is placed on the voucher waitlist to begin the pre-eligibility process.</li> <li>Pre-eligibility consists of a background check, (which can require several days) credit check, and any active debts to any housing authorities.</li> <li>When the applicant successfully completes pre-eligibility, SAHA/HABC will request the eligibility packet. <i>Please note eligibility packet may be filled out prior to passing the pre-eligibility screening. Eligibility packet is only required for client who completed the pre-eligibility form.</i></li> <li>Eligibility appointments must be scheduled and are available the second and third Thursday of the month.</li> <li>SAHA/HABC provides SARAH with status updates bi-weekly.</li> </ul>
<b>Updating Referral Status/Voucher Project Enrollment/Move-in Information</b>	<ul style="list-style-type: none"> <li>Upon receipt of status updates, SARAH will update the referral status with the appropriate status.</li> <li>If indicated that the voucher has been issued, Referral Status will be updated to reflect "Approved/Accepted".             <ul style="list-style-type: none"> <li>Once indicated that voucher has been issued, Homelink Voucher CE enrollment will be closed.</li> <li>HH will be enrolled in the designated voucher project in HMIS.</li> </ul> </li> <li>If indicated that the client has completed the Housing Authority Housing inspection process (e.g. "leased up"), SARAH will verify the client is no longer enrolled in a conflicting project before entering the "Move-in" date.</li> </ul>
<b>SAHA EHV Fees Reimbursement</b>	<ul style="list-style-type: none"> <li>SAHA has a limited amount of funding for EHV reimbursements. <a href="#">Click here for additional Information.</a></li> <li>Reimbursements must be submitted within 30 days of the client's</li> </ul>



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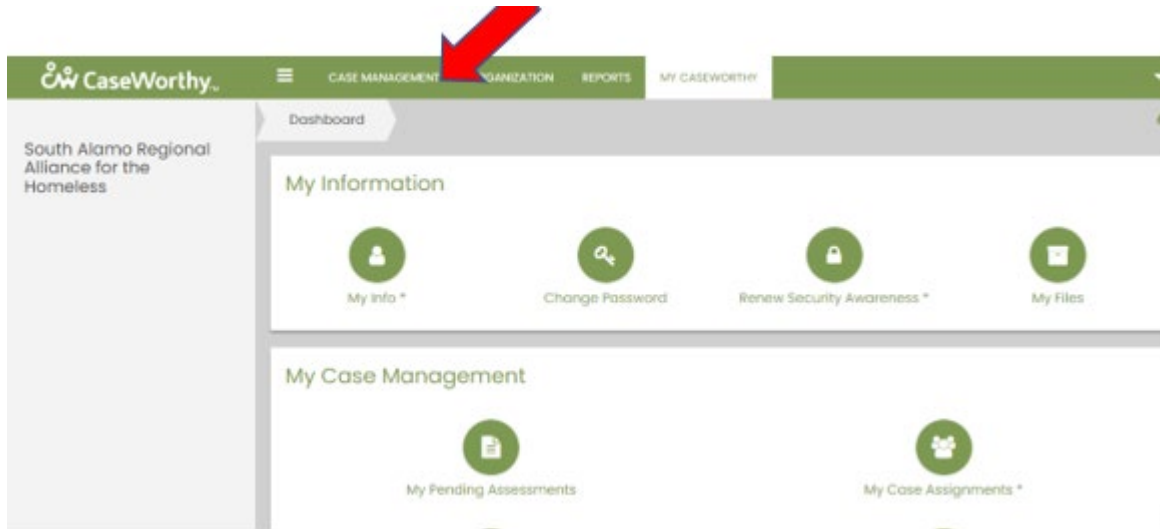
	lease date; otherwise, they will not be approved for reimbursement.
<b>Steps for Reimbursement Requests (EHV only)</b>	<ul style="list-style-type: none"><li>• Partners must become a vendor by submitting the required documents listed below: <i>(SAHA requirement before reimbursements will be processed)</i><ul style="list-style-type: none"><li>○ Direct Deposit Form</li><li>○ Profile of Firm Short Form</li><li>○ W9</li></ul></li><li>• Documents are only required to be completed once. Completed forms must be returned to <a href="mailto:ehv@saha.org">ehv@saha.org</a>.</li><li>• <i>Please note this email address is only for the purposes stated above. Inquiries regarding client applications or other client information should not be sent to this email address.</i></li></ul>



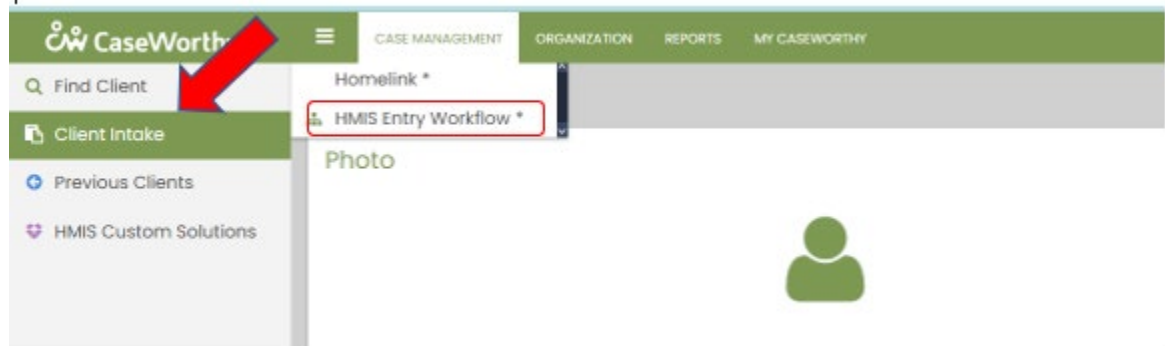
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### Homelink Voucher CE Enrollment

1. From the HMIS home screen, select Case Management from the top navigation bar.



2. From the Client Landing Dashboard, click on Client Intake, then select HMISE Entry Workflow.





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3. Complete the HMIS Add New Client form. “\*” Indicates that information must be supplied to move on in the assessment. Enter the Head of household’s (HoH) name and DOB minimally. Click the button to check for duplicates.

The screenshot shows the 'Identifying' section of the 'HMIS Add New Client' form. It contains various input fields and dropdown menus, many with a red asterisk indicating required information. A prominent red arrow points to a green button labeled 'Check For Duplicates'.

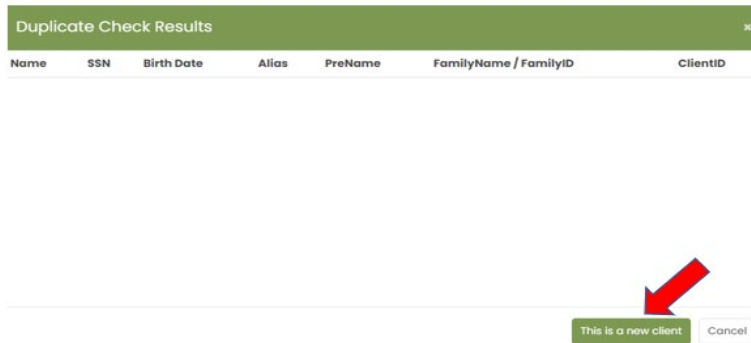
- a. If the client is already in HMIS, their information should appear in the Duplicate Check Results pop-up window. Select the client by hovering the cursor over the client’s name and clicking. The window will close and return to the HMIS Add Client form. The identifying information previously entered will auto-populate into the Identifying page. Ensure information is still accurate and click Save.

Duplicate Check Results						
Name	SSN	Birth Date	Alias	PreName	FamilyName / FamilyID	ClientID
Test, HMIS	111-11-1111	05/01/1977			Test,HMIS-1977-05-01 / 128471	303354



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- b. If no entries are returned on the Duplicate Check Results pop-up window or the entry is not the correct client, select This is a New Client. The window will close and return to the HMIS Add Client form. Enter all required and known client information.



4. Complete the HMIS Add Family Member Spreadsheet for each member of the HH by clicking Add Row in the upper right corner of the form and repeat the process for each household member. If HH already exists in HMIS, ensure that each member of the HH is on the form, then Save.

Name Data Quality *	First Name *	Middle Name	Last Name *	Suffix	Dupe Check	Birth Date *	Age	SSN *
✓ Full name reported	HMIS		Test			5/1/1977	45	III-III-III
✓ Full name reported	LilG	name	Test			8/9/1991	30	
✓ Full name reported	LilJ		Test			4/10/1990	32	001-II-III



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5. The Enrollment Add/Edit form will open. Enrollment Entry Date will auto-populate with the current date, and Enrollment Exit Date will auto-populate with “Open.”
  - a. Select “Homelink Voucher CE” from the Program Dropdown.

Enrollment Add/Edit

Family Name: Test/HMS-9977-05-01

Enrollment Entry Date: 06/02/2022

Enrollment Exit Date: Open

Provider: SABAH

Program: **Homelink Voucher CE**

Family or Individual enrollment is specific

Family Or Individual

Assign Case Manager

Schedule Follow Up

Restriction Information

- b. Select if the enrollment applies to the HoH only or the family unit.

Family or Individual: Pick "Family" to indicate the enrollment reflects data for the whole family. Pick "Individual" to indicate the enrollment is specific to each enrolled member.

Family Or Individual: Family

Assign Case Manager

Schedule Follow Up

Restriction Information

Restriction: Shared

- c. Ensure that the client has provided verbal (documented in a case note) or written consent for the HMIS process and information sharing. If the client has authorized sharing their information (and there is a supporting case note and/or ROI in HMIS), then ensure “Shared” is selected in the Restriction field. See screenshot above. Then click

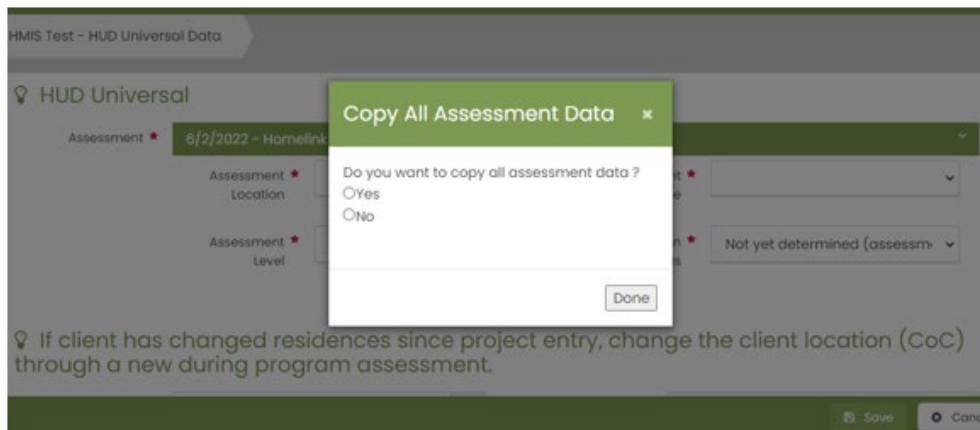




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Save in the lower right corner. *Enrollments without indication of an authorized ROI will not be processed.*

6. Complete the HUD Assessments. If HoH has completed the HUD Assessments attached to another project within the past 12 months, then the assessment data can be copied. If not, complete the following HUD assessments with the most accurate information.

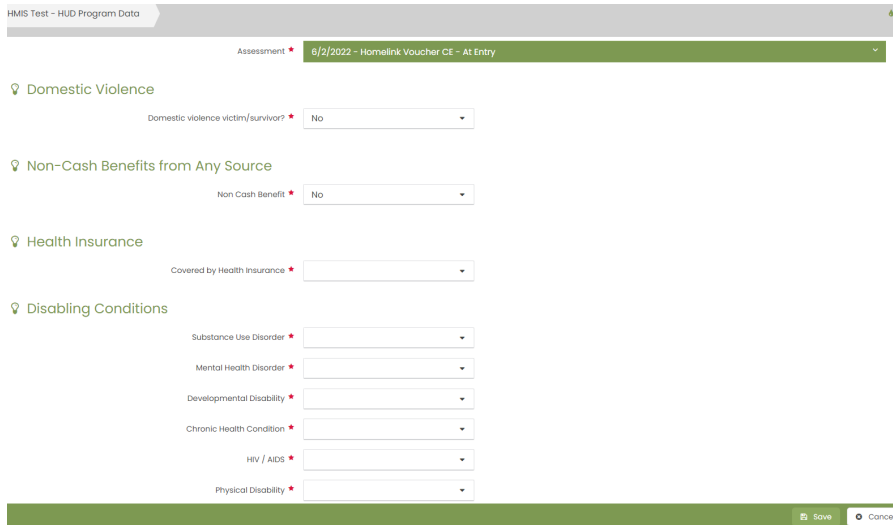


- a. HUD Universal: Note the Assessment Level and Prioritization Status auto-populate. Complete assessment and Save.



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### b. HUD Program Assessment: Complete and Save.

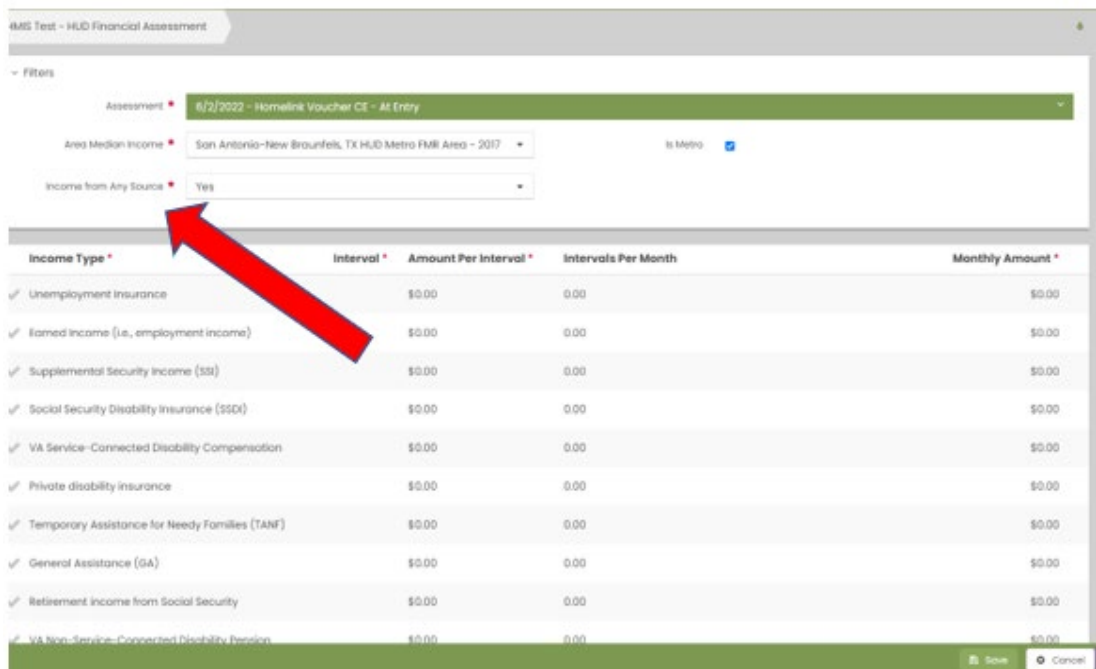


The screenshot shows the 'HUD Program Assessment' section of the application. It includes several dropdown menus for the following categories:

- Domestic Violence: Domestic violence victim/survivor? (No)
- Non-Cash Benefits from Any Source: Non Cash Benefit (No)
- Health Insurance: Covered by Health Insurance
- Disabling Conditions: Substance Use Disorder, Mental Health Disorder, Developmental Disability, Chronic Health Condition, HIV / AIDS, Physical Disability

At the bottom right, there are 'Save' and 'Cancel' buttons.

### c. HUD Financial Assessment: Complete and Save. Ensure that if it is indicated that HH has income from any source, then the type and amount must be specified. Click Save.



The screenshot shows the 'HUD Financial Assessment' section. A red arrow points to the 'Income from Any Source' dropdown menu, which is currently set to 'Yes'. Below this is a table for listing income sources.

Income Type *	Interval *	Amount Per Interval *	Intervals Per Month	Monthly Amount *
<input checked="" type="checkbox"/> Unemployment Insurance		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Earned Income (i.e., employment income)		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Supplemental Security Income (SSI)		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Social Security Disability Insurance (SSDI)		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> VA Service-Connected Disability Compensation		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Private disability insurance		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Temporary Assistance for Needy Families (TANF)		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> General Assistance (GA)		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> Retirement income from Social Security		\$0.00	0.00	\$0.00
<input checked="" type="checkbox"/> VA Non-Service-Connected Disability Pension		\$0.00	0.00	\$0.00

At the bottom right, there are 'Save' and 'Cancel' buttons.



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7. Complete Voucher Application Form.
  - a. Enter the date that the client signed the voucher application in the application date field.
  - b. Check the box to indicate that the Application Packet has been uploaded.
    - i. **Please note enrollments/referrals without Application packets being uploaded to HMIS will not be processed.**
  - c. Select and add Services Being Provided from the dropdown. Click Save or Description of Vouchers Button.
    - i. **Please note enrollments/referrals for SAHA EHV's will not be processed if it is not indicated that the agency will provide Housing Search Assistance and Stabilization Case Management.**
    - ii. **Also if the agency plans to request reimbursement from SAHA for EHV related fees then it must be indicated here.**

HMIS Test - Homelink Voucher

Assessment 6/3/2022 - Homelink Voucher Application At Entry

Application Date \* --/--/----

Application Packet Uploaded?

Services Being Provided \* Choose Options...

- ✓ Housing Search Assistance (Required for EHV's)
- ✓ Stabilization Case Management (case management for a minimum of 90 days post move-in) (Required for EHV's)

Add Selected Cancel



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- d. Click Description of Voucher button for a brief description and eligibility requirements for each Homelink Voucher. Click Save.

HMS Test - Homelink Voucher

Assessment **6/3/2022 - Homelink Voucher CE - At Entry**

Application Date \*

Application Packet Uploaded?

Services Being Provided \*

8. Complete Coordinated Entry Event. From the Service Spreadsheet. Click the check mark next to the Coordinated Entry Event. Then Click Save.

Service Spreadsheet (new)

Filters

Program \*  Category

Total Rows: 1

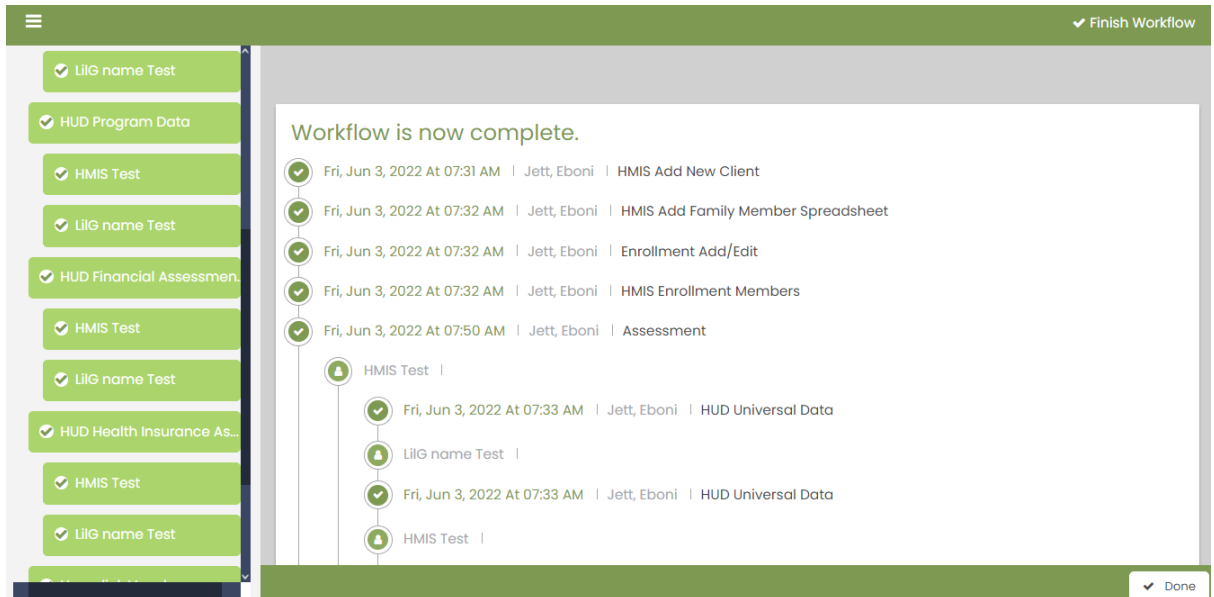
Service	Begin Date	Units *	Unit Value	Total
<input checked="" type="checkbox"/> Coordinated Entry Event		1	1.00	\$1

1



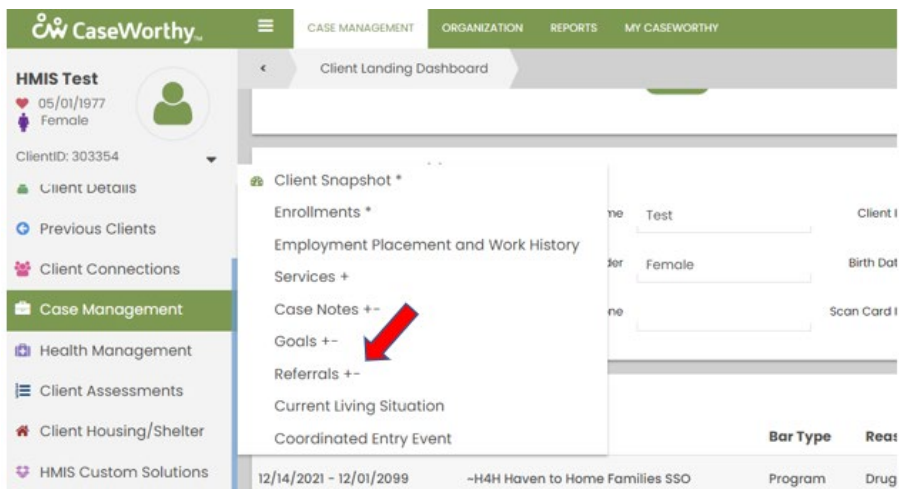
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9. A Summary window will open. Click Done.



## Homelink Voucher CE Referral Process

1. From the HoH's HMIS Profile, select Case Management from the left navigation panel. The select Referrals.





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- From the Client Referrals form, click the + Add New button from the upper right corner.

The screenshot shows the 'Client Referrals' page in the Worthy system. The page has a green header with navigation tabs: CASE MANAGEMENT, ORGANIZATION, REPORTS, and MY CASEWORTHY. Below the header, there is a breadcrumb trail 'Client Referrals' and a '+ Add New' button in the top right corner, which is highlighted with a red arrow. Below the button, it says 'Total Rows: 29'. The main content is a table with the following columns: Referral Date, Provider, Service, Refer to User, Referral Status, Referral Outcome, Case Note, Created By, Work Number, and Sys ID. Two rows of data are visible:

Referral Date	Provider	Service	Refer to User	Referral Status	Referral Outcome	Case Note	Created By	Work Number	Sys ID
5/25/2022	Haven for Hope - Supportive Housing	H4H CY RRH		Referred	Unknown		Trejuan Howard	210-220-2937	1112
4/25/2022	Goodwill Industries	Work Clothes		Referred	Unknown		Lori Stewart		1101

- An Add New window will open. The referral date will auto-populate today's date. Click in the Refer to field and another window will open.

The screenshot shows the 'Add New' form in the Worthy system. The form is titled 'Add New' and 'Enter Provider Referral'. It contains several input fields:

- Enrollment: dropdown menu
- Refer To: text input with search icon
- Refer to Person: dropdown menu
- Referral Date: date and time picker (06/03/2022 12:54 PM)
- Referral Status: dropdown menu
- Referral Outcome: dropdown menu (Unknown)



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- a. From the Provider Referral with Service Filter Lookup, type SARAH into the Provider Name field and click Save. All of the vouchers associated with SARAH will appear. Hover the cursor over the desired voucher project and the row will highlight, then click on the row.

Provider Referral with Service Filter Lookup

Provider Referral with Service Filter

Filters

Service: [Dropdown]

Distance in Miles: [Input]

Provider Name: SARAH

[Map]

Total Rows: 4

Provider	Service	Distance	P - Lat	P - Long	Email	Phone	EntityID
SARAH - E Piedras, 4000 East Piedras Drive, San Antonio	SARAH SAHA ARP DHV PH Referral	5.37	29.4882581	-98.5682387			382391
SARAH - E Piedras, 4000 East Piedras Drive, San Antonio	SARAH HADC ARP DHV PH Referral	5.37	29.4882581	-98.5682387			382391
SARAH - E Piedras, 4000 East Piedras Drive, San Antonio	SARAH SAHA COVID 19 Voucher PH Referral	5.37	29.4882581	-98.5682387			382391
SARAH - E Piedras, 4000 East Piedras Drive, San Antonio	SARAH SAHA Family Voucher PH Referral	5.37	29.4882581	-98.5682387			382391

- b. The Add New form will reopen. Notice that whatever voucher project was identified on the previous form is now auto-populating in the Service field. Select Referred from Status Field. Then select Case Note. The Case Note field will open. Enter case note documenting the application submission. After Saving Case Note, Add New form will reopen. Click Save in the lower right corner of the form.

Add New

Enter Provider Referral

Enrollment: [Dropdown]

Refer To: SARAH - E Piedras

Refer to Person: [Dropdown]

Referral Date: 06/03/2022 1:01 PM

Service: SARAH SAHA ARP DHV PH Referral

Referral Status and Outcome (if known)

Referral Status: Referred

Referral Outcome: Unknown

Referral Voucher Information

Provider Voucher to Client: [Checkbox]

Case Note and Restriction Information

Case Note: [Text Area] [Save Case Note]

Restriction: Shared

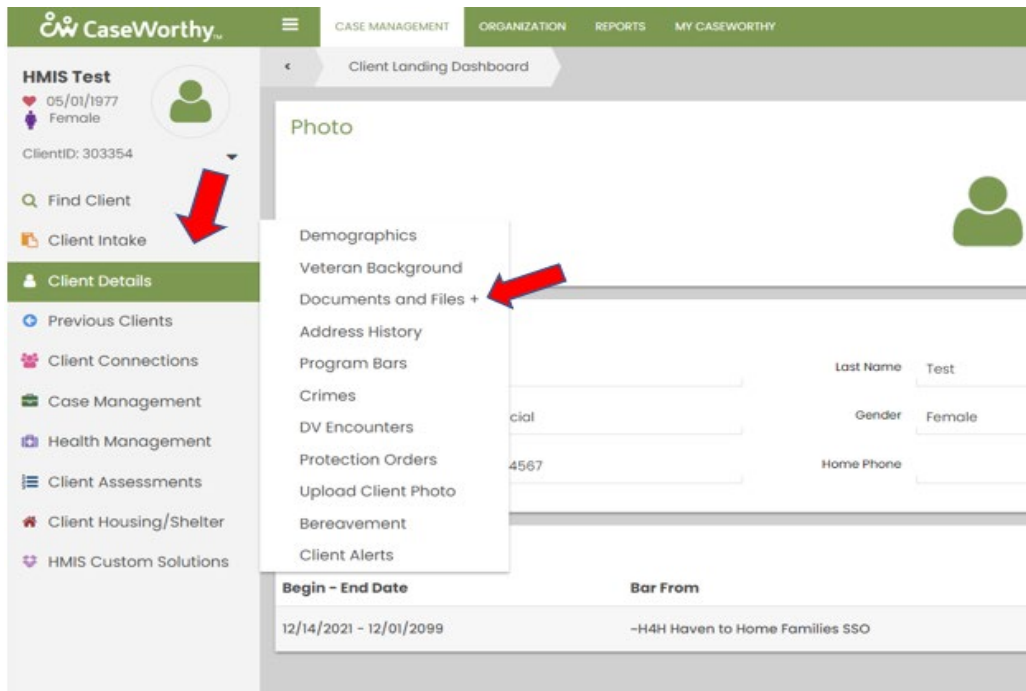
Text Description: [Text Area]



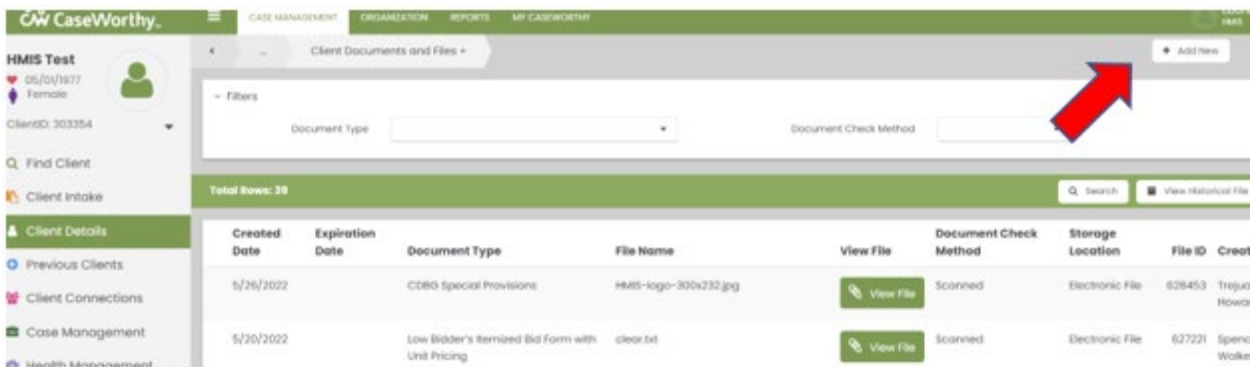
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### Uploading the Voucher Application Packet

1. From the Client's HMIS Profile select Client Detail from the left Navigation Panel. Then select Documents and Files from the dropdown menu.



2. The Client Document and Files form will open. Select Add New from the upper right corner.







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- From the Add New form, select the checkmark next to “Other Information”. Upload or Attach the complete application packet. Click Save. **Note: for ease of tracking, please ensure that application packets are labeled as such: “Voucher Program (i.e., EHV) Application- HMIS ID#, Referral Date”**

Add New

Document Type *	Default Verification Method	Storage Location *	Upload File	Created Date	Expiration Date
<input type="checkbox"/> Food Stamp or TANF Award Letter or Application					
<input type="checkbox"/> Verification of Income Contribution Form					
<input type="checkbox"/> Letter from Social Security/ VA Verifying Current Claim Status or Application					
<input checked="" type="checkbox"/> Other Information		Electronic File	<input type="text"/> <input type="button" value="Browse"/> <input type="button" value="Attach Scanned Document"/>	06/03/2022	<input type="text"/>

Case Note

Restriction

### Checking the Status of Referrals

#### Referral Status Key

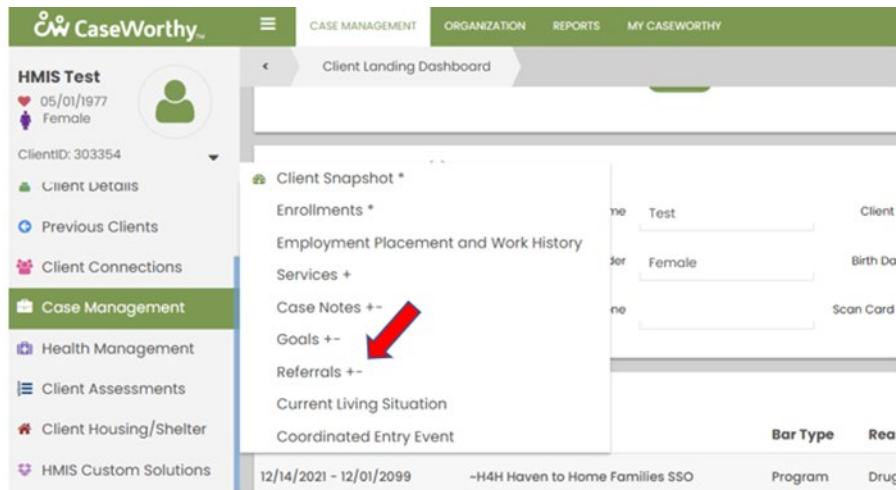
Referral Status	Explanation	Responsible Party
Referred	Homelink Enrollment complete, Application Packet has been uploaded and CM has completed Referral Process in HMIS.	CM submitting application
Acknowledged	SARAH will review submissions daily and acknowledged the referral. Status will remain acknowledge if corrections are requested.	SARAH
Pending Approval	Packet has been submitted to SAHA/HABC	SARAH
Acceted/Approved	SAHA/HABC issued the voucher. <i>Once application has been approved and voucher has been</i>	SARAH



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	<i>issued, the HH will be enrolled in the voucher project and Homelink Voucher CE project enrollment will be closed.</i>	
Turned Away	N/A	
Ineligible	SAHA/HABC has indicated that the client is not eligible for the program.	SARAH
Client did not Show Follow up	Corrections to the packet were not received back within five business days/client does not attend eligibility appointment with Housing Authority.	SARAH

- The status of the application can be reviewed from the HoH's HMIS Profile, select Case Management from the left navigation panel. The select Referrals.



The screenshot shows a table of referrals. The 'Referral Status' column for the first row is circled in red. The table has columns for Referral Date, Provider, Service, Refer to User, Referral Status, Referral Outcome, Case Note, Created By, Work Number, and System ID.

Referral Date	Provider	Service	Refer to User	Referral Status	Referral Outcome	Case Note	Created By	Work Number	System ID
6/3/2022	SARAH - E Pedras	SARAH SAHA ARP EHV PH Referral		Accepted/Approved	unknown		Eboni Jett	210-876-0720	111257