



**South Alamo Regional Alliance
Homeless Diversion Pilot Job Aid**



PART I: [Workflow Job Aid](#)

PART II: [Additional Pilot Information](#)

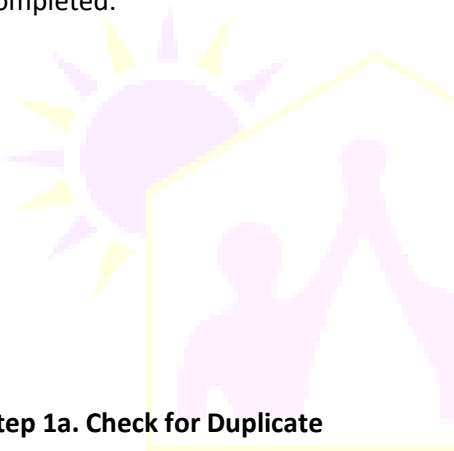
PART III: [Attachment](#)

SARAH
South Alamo Regional Alliance for the Homeless

PART I – Workflow Job Aid

Workflow Step 1. Add Client

- Enter client information.
- Enter first and last name the click “check for duplicates”. Step 1a.
- After completing step 1a. this page will reappear.
- All Fields with a red asterisk must be completed.



Step 1. Add Client

Step 1a. Check for Duplicates

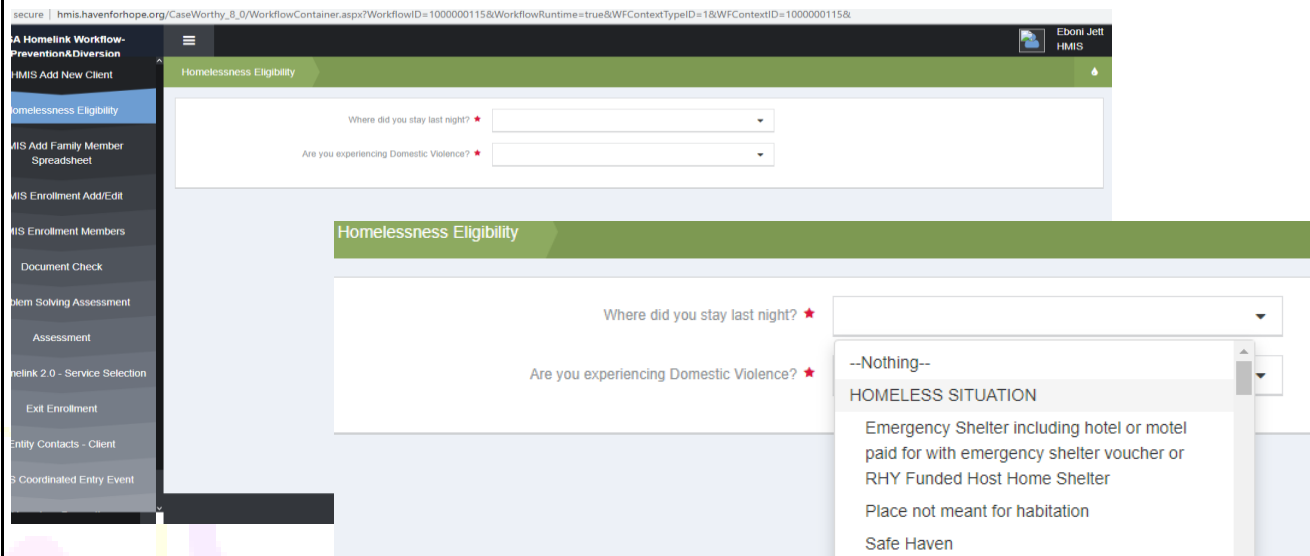
Name	SSN	Birth Date	Alias	PreName	FamilyName	ClientID

- **Step 1a. Check for Duplicate**
- Click “This is a new client” or select client from the list if applicable.
- You will be returned to the Add Client page (Step 1).
- Enter all known information
- Save

Step 2. Establish Homelessness

- Select from the dropdown list the living situation that most closely resembles what has been reported.
 - Literal Homeless options are listed in the dropdown to the right.

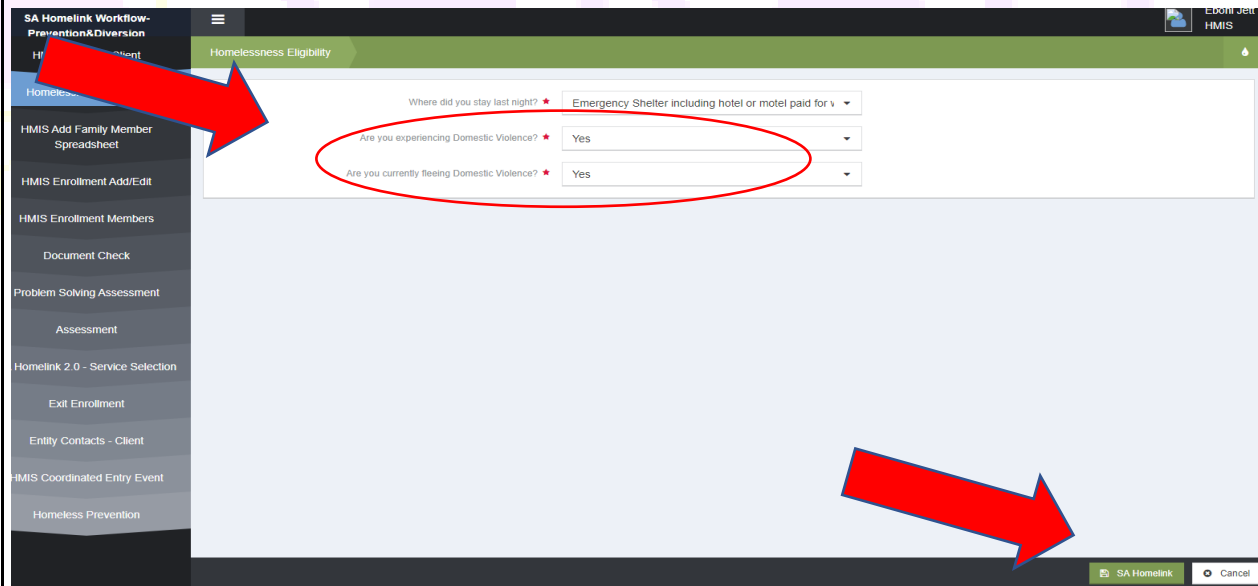
Step 2. Establish Homelessness



Step 2a.

- If “yes” is reported for “experiencing domestic violence” then a third question will populate.
- The third question asks if client is “currently fleeing” domestic violence.
- Click the SAHomelink button to continue

Step 2a.



❖ *Note: Regardless of the client’s living arrangement (question one) the client is eligible for Diversion Assistance if they are currently fleeing domestic violence.*

Step 3. Add Family Members, if applicable

- If applicable, click “Add New”
- Repeat Step 1 for each family member
- Save
 - *Note: Clicking save will take you to the next page and does not allow you to go back to previous pages.*

Step 3. Add Family Members

Name Data Quality *	First Name *	Middle Name	Last Name *	Suffix	Dupe Check *	Birth Date	SSN *
Full name reported	ric		test			2/1/2001	19 111-22-1411

Step 4. Add SAHomelink Enrollment Member

- Required fields should pre-populate
- Project = SAHomelink CE
- All Fields with a red asterisk must be completed
- Save

Step 4. Add SAHomelink Enrollment Member

Step 5. Family Member Enrollment

- Click in the box next to each family member to be included for HMIS Enrollment Members
- Save

Step 5. Family Member Enrollment

SA Homelink Workflow - Prevention & Diversion
 HMIS Add New Client
 Homelessness Eligibility
 HMIS Add Family Member Spreadsheet
 HMIS Enrollment Add/Edit
HMIS Enrollment Members
 Document Check
 Problem Solving Assessment
 Assessment
 Homelink 2.0 - Service Selection
 Exit Enrollment
 Entity Contacts - Client
 HMIS Coordinated Entry Event

HMIS Enrollment Members

Member enrollment dates must either fall between or be equal to the enrollment begin and end dates for the HoH.
 Choose the family members you want to include in this enrollment from the list below.

Client	Provider *	Restriction *	Start Date *	End Date	Enrollment Relationship to HOH
<input checked="" type="checkbox"/> test, nic	SARAH	Shared	7/8/2020	Open	Self

Save Cancel

Step 6. Add Release of Information

- ❖ During the discussion, client privacy should be addressed.
 - Check box next to Information Release

Step 6. Add Release of Information

SA Homelink Workflow - Prevention & Diversion
 HMIS Add New Client
 Homelessness Eligibility
 HMIS Add Family Member Spreadsheet
 HMIS Enrollment Add/Edit
 HMIS Enrollment Members
Document Check
 Problem Solving Assessment
 Assessment
 Homelink 2.0 - Service Selection
 Exit Enrollment
 Entity Contacts - Client
 HMIS Coordinated Entry Event

Document Check

Default Verification Method: [Dropdown] Category: Choose Options... [Dropdown]

Total Rows: 11 Search

Document Type *	Default Verification Method	Storage Location *	Upload File	Created Date	Expiration Date
<input checked="" type="checkbox"/> Information Release					
<input checked="" type="checkbox"/> Bank Statement					
<input checked="" type="checkbox"/> Selective Service Registration					
<input checked="" type="checkbox"/> Person Centered Plan					
<input checked="" type="checkbox"/> SPDAT Summary					

Save Cancel

Step 6a.

- Checking the box next to “[Information Release](#)” causes the document
- Attach scanned document
- Save

Step 6a.

The screenshot shows the 'Document Check' interface. On the left is a sidebar with navigation options. The main area displays a table with columns: Document Type, Default Verification Method, Storage Location, Upload File, and Created Date. The 'Information Release' row is selected, and its checkbox is circled in red. Below the table, there are buttons for 'Case Note' and 'Attach Scanned Document', with the latter also circled in red. At the bottom right, there are 'Save' and 'Cancel' buttons.

Step 7. Diversion Problem-Solving Assessment (DPSA)

- ❖ Remember the problem-solving assessment is a thorough conversation with the client utilizing the skills developed during Homeless Diversion training.
- ❖ The problem-solving assessment in HMIS helps you capture your diversion solutions, not to document the problem-solving conversation verbatim.
- ❖ Also remember that clients can be diverted from homelessness through solutions that do not include financial assistance.

Step 7. Diversion Problem-Solving Assessment (DPSA)

The screenshot shows the 'Problem Solving Assessment' form. It contains three questions:

- Where did you sleep last night? Emergency Shelter including hotel or motel paid for with emergency shelter voucher or RHY Funded Host Home Shelter
- Was it a safe location? No
- Could you stay in the place that you stayed last night?

 At the bottom right, there is a 'Cancel' button.

Step 7 cont'd. DPSA

- Question 1: Answer will populate based on your response in [Step 2](#).
- Questions 3, 5 & 6 are asking if assistance would help the client in three different scenarios.
- Answering “yes” to questions 3, 5 & 6 will display questions 3a & 3b, 5a & 5b and 6a & 6b respectively.
- Questions 3a, 5a & 6a are dropdown fields that allows you to select multiple options related to approved SARAH Homeless Diversion Pilot services. (See Diversion Pilot Guidelines)
- Questions 3a, 5a & 6a are amount fields for you to enter the total amount of requested assistance. (Invoices are required for all assistance request, except grocery cards).

Step 7 cont'd. DPSA

The screenshot shows the 'Problem Solving Assessment' form in the SA Homelink Workflow. The form is titled 'Problem Solving Assessment' and is part of the 'SA Homelink Workflow - Prevention & Diversion' system. The user is Eboni Jett, HMIS. The form contains the following questions and answers:

- 1. Where did you sleep last night? Emergency Shelter including hotel or motel paid for with emergency shelter voucher or RHY Funded Host Home Shelter
- 2. Was it a safe location? No
- 3. Could you stay in the place that you stayed last night? No
- 4. What living arrangements have you had in the past year? Lived with a roommate.
- 5. Could brief temporary assistance help you secure this type of housing situation again? Yes
- 5a. If yes, what would you need to help you stay where you stayed before? (Dropdown menu open with selected options: Mover Cost Assistance, Other Financial Assistance, Phone Call, Rental Payment Assistance, Security Deposit Assistance, Training & Development Services, Transportation)
- 5b. Amount
- 8. Was Diversion Problem Solving Successful?
- Has the assessor received SARAH Diversion Training?



SARAH Homeless Diversion Pilot HMIS/SAHomelink Job Aid

Step 7 cont'd. DPSA

- Question 8: select the appropriate outcome of the problem-solving assessment from the dropdown.
 - Yes, client will be enrolled in the SAHomelink Diversion Pilot.
 - **Yes**, client did not require financial assistance/will be referred to other resource. (i.e., referral will occur external to HMIS)
 - No, client refused. (i.e., client identifies that there are no immediate housing solutions available or does not want to complete the Problem-Solving Assessment)
 - No, problem-solving did not identify an immediate housing solution.
 - No, client requires additional support to meet housing needs. (i.e., client's presenting needs are greater than those that could be met by a short-term diversion intervention)
- There is a mandatory box that must be checked indicating that you, as the assessor, has completed Diversion Problem Solving training.
- Save

The screenshot displays the 'Problem Solving Assessment' form within the SA Homelink Workflow-Prevention & Diversion system. The form contains the following questions and answers:

- 2. Was it a safe location? * No
- 3. Could you stay in the place that you stayed last night? * No
- 4. What living arrangements have you had in the past year? * Lived with a roommate.
- 5. Could brief temporary assistance help you secure this type of housing situation again? * Yes
- 5a. If yes, what would you need to help you stay where you stayed before? * Choose Options... (Groceries Financial Assistance, Rental Payment Assistance, Security Deposit Assistance)
- 5b. Amount * 750
- 8. Was Diversion Problem Solving Successful? * Yes, client will be enrolled in the SA I

A red circle highlights question 8 and the checkbox for 'Has the assessor received SARAH Diversion Training?' which is checked. The bottom right of the form has 'Diversion' and 'Cancel' buttons.

Step 8: Exit Enrollment

- This page should prepopulate with the date the enrollment was completed “Begin Date” and an end date of “Open”.
- Save

Step 8: Exit Enrollment

HMIS Add New Client

Homelessness Eligibility

HMIS Add Family Member Spreadsheet

HMIS Enrollment Add/Edit

HMIS Enrollment Members

Document Check

Problem Solving Assessment

Custom - Edit Enrollment

Custom - Edit Enrollment

⚠ By clicking save, all members assessments and enrollment with the same entry or exit date will be adjusted to the Begin and EndDate. Client with the the different date will be adjusted to earlier or later date as nessesary.

Family: test,ricki-1989-09-09

Program Name: SA Homelink CE

Enrollment Status: Assessments Pending

Organization: South Alamo Regional Alliance for the Homeless

Account:

Provider Name: SARAH

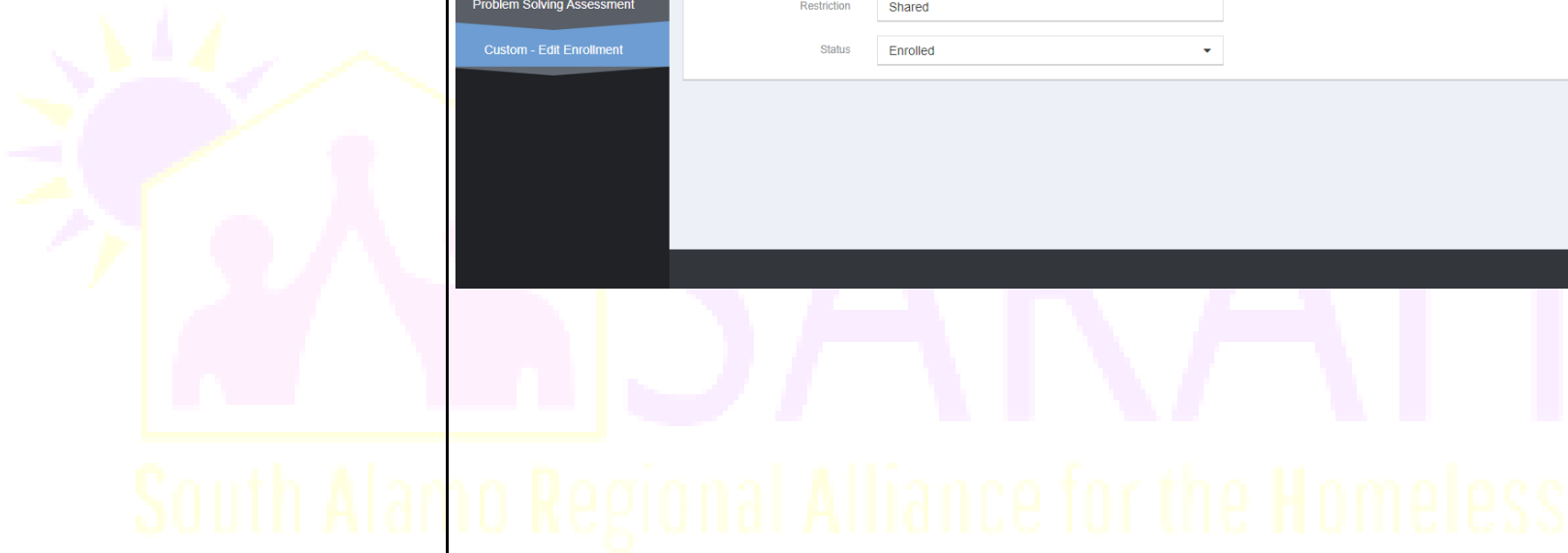
Begin Date: 07/10/2020

End Date: Open

Restriction: Shared

Status: Enrolled

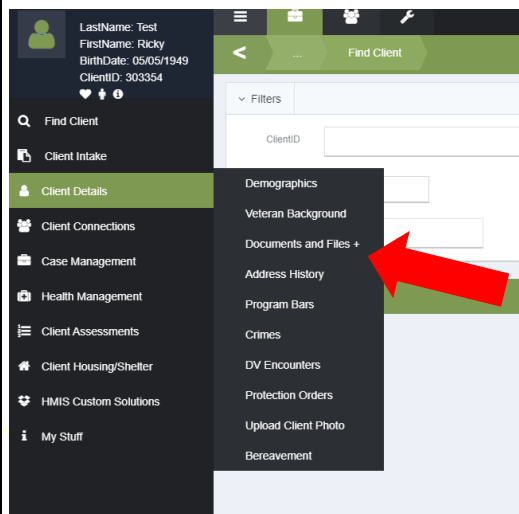
Save Cancel



Step 9: Supporting Documentation

Step 9: Supporting Documentation

- ❖ This is not a sequential step. It can be completed at any time after step 8.
- ❖ Invoices are required for all assistance request, except grocery cards.
 - Open Client’s Documentation and Files page by clicking on Client Detail in the left pane and selecting Documents and Files from the options.
 - Click on the “Add New” button from the upper right corner.



Created Date	Document Type	File Name	View File	Document Check Method	File ID	Created By
7/10/2020	Selective Service Registration	WILLIAM ANTHONY GUTIERREZ ssv.pdf	View File	Scanned	517533	William Gutierrez
4/18/2020	PhotoID	DL.jpg	View File	Scanned	513183	Josie Hamilton
3/21/2020	Bank Statement	notes.docx	View File	Copied	511350	Jenni Hernandez2
2/29/2020	PhotoID	Launch Button.PNG	View File	Scanned	507516	Josie Hamilton
12/14/2019	Misc.	Test Document.docx	View File	Scanned	492747	Josie Hamilton
12/14/2019	PhotoID	Ricky Test.jpg	View File	Scanned	492748	Josie Hamilton

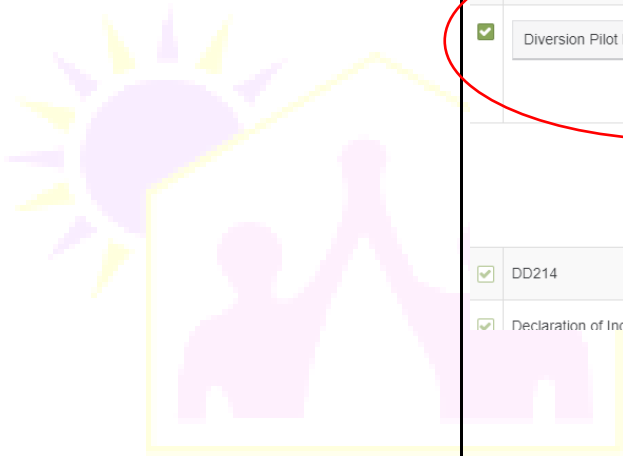
SARAH Homeless Diversion Pilot HMIS/SAHomelink Job Aid

Step 9: Supporting Documentation Cont'd

- Check the box next to the document type “Diversion Pilot Documents”
- Enter the known information and attached the document to the page.

Add New

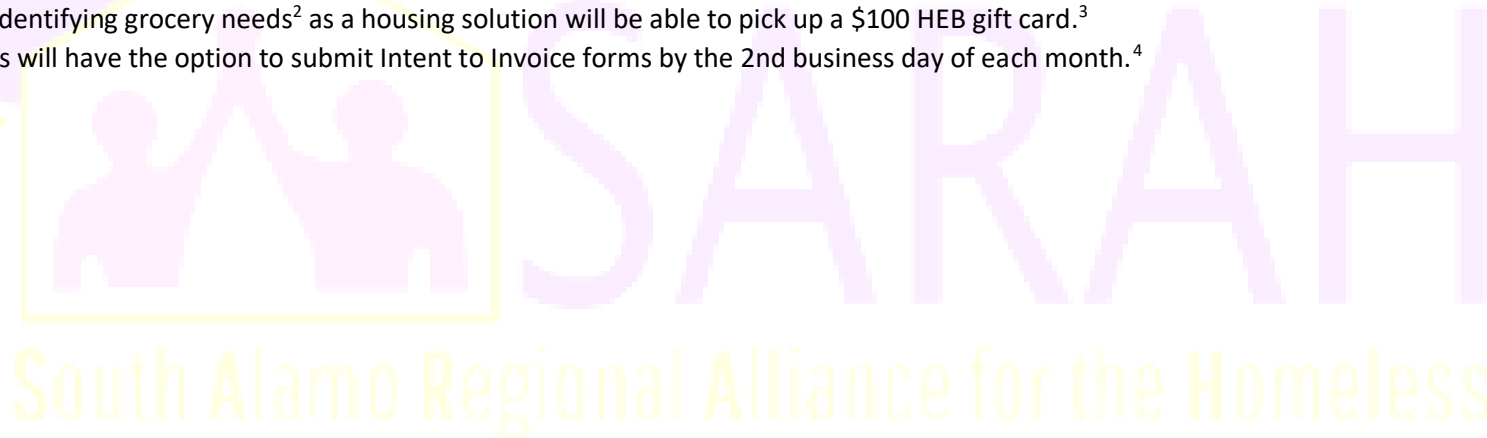
Document Type *	Default Verification Method	Storage Location *	Upload File	Created Date	Expire
<input checked="" type="checkbox"/> Bank Statement					
<input checked="" type="checkbox"/> Selective Service Registration					
<input checked="" type="checkbox"/> Person Centered Plan					
<input checked="" type="checkbox"/> SPDAT Summary					
<input checked="" type="checkbox"/> Diversion Pilot Documents		Electronic File	<input type="text"/> <input type="button" value="Browse"/> <input type="button" value="Attach Scanned Document"/>	07/10/2020	
Case Note <input type="button" value="Case Note"/> Restriction <input type="text" value="Shared"/>					
<input checked="" type="checkbox"/> DD214					
<input checked="" type="checkbox"/> Declaration of Income (DOI)					



South Alamo Regional Alliance for the Homeless

Part II: Homeless Diversion Pilot Procedural Additional Information

1. Participating Agencies must be a SAHomelink access point or network partner.
2. Participating Agencies will need to identify a SAHomelink person of contact (POC).
3. Persons conducting DPSA must be Certified in Diversion Problem-Solving¹
4. Diversion Problem Solving Assessments must be documented in HMIS SAHomelink workflow.
5. If diversion can only be accomplished utilizing the SARAH Homeless Diversion Pilot's financial assistance, clients must submit supporting documentation to the person conducting the assessment to be uploaded into HMIS within seven days of the enrollment.
6. Diversion programs are intended to assist in accomplishing successful housing solutions in a short timeframe (5-7 days). All enrollments remaining open without supporting documentation will be closed by SARAH 14 days after enrollment.
7. Agency POC will receive Notification of Referral Status email within 48 business hours of appropriate supporting documentation being uploaded or within seven days of enrollment to indicate if documentation is outstanding or insufficient.
8. Clients identifying grocery needs² as a housing solution will be able to pick up a \$100 HEB gift card.³
9. Agencies will have the option to submit Intent to Invoice forms by the 2nd business day of each month.⁴



¹ Certification is accomplished by attending the SARAH Diversion Training and completing a post-training survey.

² Grocery cards do not require supporting documentation but will only be available after Notification of Referral Status indicates that the referral has been approved.

³ Grocery cards will be distributed by appointment. Client must have active method of contact (i.e., cell phone, email, message services, etc.). For additional information contact SARAH Prevention & Diversion Coordinator, Kathy Lacy, kathylacy@sarahomeless.org.

⁴ Monthly emails will be sent on the 20th of each month to notify participating agencies' POC of their ability (and the process) to invoice for the next month's approved services.

Part III: Attachments

A. HMIS Client Release of Information



Client-Release-of-Information-Form.pdf

