HMIS WORKFLOW FOR 'CLIENT HISTORY (RRH)' REPORT

On March 24, 2020, the Sonoma County Community Development Commission (SCCDC) released a Directive Memo entitled "Tracking Rapid Rehousing and Homeless Prevention in HMIS." In a follow-up to the memo, the SCCDC has created reports in HMIS to assist project staff in determining the amount of rental and/or utility assistance a participant may have previously received through any rapid re-housing (RRH) and/or homelessness prevention (HP) projects during the past three (3) years. The "Client History (RRH)" report will help verify if a participant has received RRH or HP services and if they had an exit **before** April 1, 2020. The "Client Rental Assistance History" report will confirm if a participant has received RRH or HP services and was exited **after** April 1, 2020.

Only two representatives per agency will be allowed access to the 'Client History (RRH)' report. Agencies must inform the SCCDC of the names of the two staff members who will have access to this report. If at any time one of these staff members leaves the agency and/or the agency would like to replace one of the staff members with another staff member, organizations shall inform the SCCDC HMIS Coordinator within three (3) business days.

Before providing financial assistance, providers must verify through HMIS if a household has received RRH and/or HP support from any other provider. Participants may not receive more than 24 months of rental assistance and 24 months of utility assistance within 3-years three (3) years.

'Client History (RRH)' Report

This report is for RRH and HP project staff to see if a participant has exited another project and the amount of assistance that the participant received from other RRH or HP project **before** April 1, 2020.

To access the report:

1. The designated staff will enter into the corresponding HMIS program for their agency.
    a. Click on 'Reports'
        i. Click on WEBi Reports (New)
            1. If it is the first time, staff may need to click on the "Refresh Report List."
        ii. Expand the "Custom Reports"
        iii. Click on 'Client History (RRH)'
            1. A new window will open up

- **a.** Enter the participant's name for who you are looking for in the "Type values here" field.
    - **i.** Staff may also choose "refresh values," and all participant's names will re-populate; however, the list is extensive as it includes all participants ever enrolled in an RRH or HP project.
- **b.** Once staff enters the participant name in the field, click the ">" button, and the name will populate under the "required prompts" field.
    - **i.** Ensure there are no other names under the "required prompts" field if there are highlight the name and client on the "<" button to remove it from the field.
- **c.** Click 'Ok'
    - **ii.** If the participant had previously been enrolled in a RRH and/or HP project, a report will generate with the participant name and list of projects with dates of previous enrollments.
    - **iii.** If the participant had not previously been enrolled in a RRH and/or HP project before a notification box will appear, 'No data to retrieve in Query 1'.

b. RRH/HP Staff will collaborate with any project(s) the participant has previously been enrolled in to obtain the number of months of rental assistance and utility assistance that the participant had received.
- **i.** Agencies previously providing services are contacted to request information on the number of months of rental assistance, and utility assistance a participant had received;
    - **1.** The information should be returned quickly to not delay the participant from receiving any support available to them.