HMIS WORKFLOW FOR 'Client Rental Assistance History' 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 Rental Assistance History" report will confirm if a participant has received RRH or HP services and was exited **after** April 1, 2020. The use of the "Client History (RRH)" report will verify if a participant has received RRH or HP services and exited **before** April 1, 2020.

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 three years three (3) years.

'Client Rental Assistance History' Report

To verify if a participant has received RRH or HP services and were exited **after** April 1, 2020,

Service providers will use the 'Client Rental Assistance History.'

To access this report:

1. RRH/HP staff will enter into the corresponding HMIS program for their agency.
   i. Click on 'Reports'
      a. Click on WEBi Reports (New)
         i. If it is the first time, staff may need to click on the "Refresh Report List."
      b. Expand the "Custom Reports"
      c. Click on "Client Rental Assistance History"
         i. A new window will open up
            1. Enter the participant names for who you are looking for in the 'Type values here' field.
               a. Staff may also click "refresh values," and all participant's names will populate; however, the list is extensive as it

includes all participants previously enrolled in a RRH or HP project.

2. Once staff member enters the participant name, 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.
3. Click 'Ok'
    - a. A report will generate with the participant information.
        - i. If the fields are empty next to the participant, they have not received any months of rental assistance or utility assistance, OR;
            1. they received support before the touchpoint information was collected, and their exit exited from a RRH or HP project occurred before April 1, 2020.