



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

**PART I: [Community Workflow Job Aid](#)**

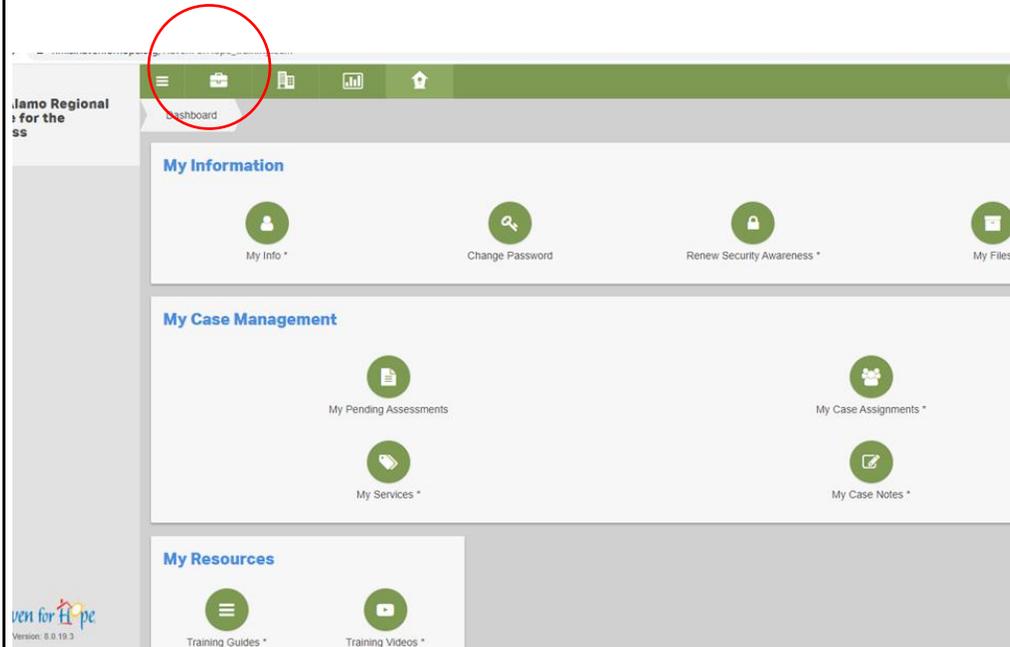
**PART II: [Additional Pilot Information](#)**

**PART III: [Attachment](#)**

**PART I – Workflow Job Aid**

**Step 1. Access Workflow**

- Click Briefcase in upper left corner



- Click Client Intake
- Click Homelink



### Step 1. Add Client

The screenshot shows the 'HMIS Add New Client' form. The 'Identifying' section includes fields for Name Data Quality (Full name reported), First Name (Ebony), Last Name (Tesyj), Middle Name, Birth Date (Full DOB reported), SSN (Full SSN reported), Gender, Citizenship Status, Race (Choose Options...), Primary Language (English), and Ethnicity. A green button with a magnifying glass icon and the text 'Check For Duplicates' is circled in red.

### Step 1a. Check for Duplicates

The screenshot shows a 'Duplicate Check Results' dialog box. It contains a table with the following columns: Name, SSN, Birth Date, Alias, PreName, FamilyName, and ClientID. The table is currently empty. At the bottom right of the dialog, there are two buttons: 'This is a new client' and 'Cancel'.

### Step 2. 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 2a. 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 3. Establish Homelessness

- Select from the dropdown list the living situation that most closely resembles what has been reported.
- 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 Homelink button to continue
- ❖ *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 2. Establish Homelessness

SA Homelink Workflow - 2.03

SAH\_Homelessness 2.0.3

**Living Situation**

Type of Residence? \* Staying or living in a friend's room, apartment or house

Are you experiencing Domestic Violence? \* Yes

Are you currently fleeing Domestic Violence? \* Yes

SA Homelink Homeless Bypass Cancel

### Step 4. 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

SA Homelink Workflow - 2.03

HMIS Add Family Member Spreadsheet

Total Rows: 1

Name Data Quality *	First Name *	Middle Name	Last Name *	Suffix	Dupe Check *	Birth Date	Age	SSN *
Full name reported	Eboni		Test			7/27	30	

Save Cancel

### Step 5. Add Homelink Enrollment Member

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

### Step 4. Add Homelink Enrollment Member

HMIS Enrollment Add/Edit

Family Name: Test, Ebony-1990-07-22

Project Start Date: 10/04/2020

Project Exit Date: Open

Project: SA Homelink CE

Account: [Empty]

Assign Case Manager:

Provider: SARAH

Schedule Follow Up: [Dropdown]

**Restriction Information**

Restriction: Shared

Save Cancel

### Step 6. 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

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.

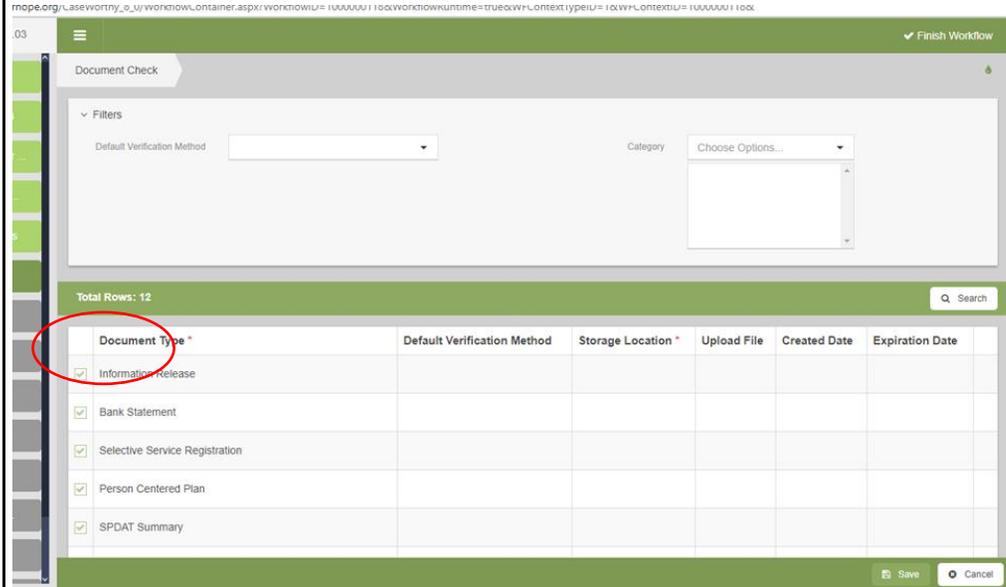
Client	Provider *	Restriction *	Start Date *	End Date	Enrollment Relationship to HOH
<input checked="" type="checkbox"/> Test, Ebony	SARAH	Shared	10/4/2020	Open	Self

Save Cancel

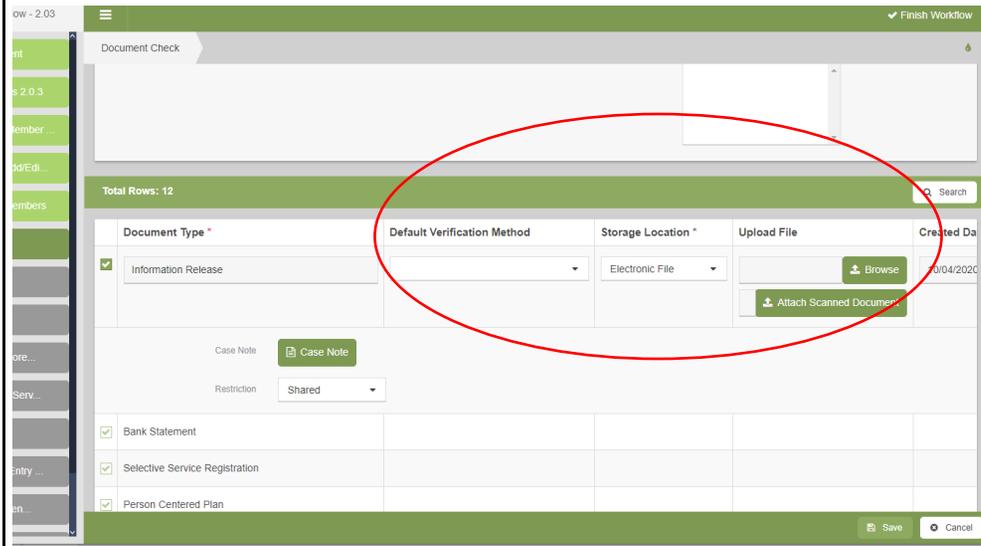
**Step 7. Add Release of Information**

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

**Step 6. Add Release of Information**



**Step 6a.**

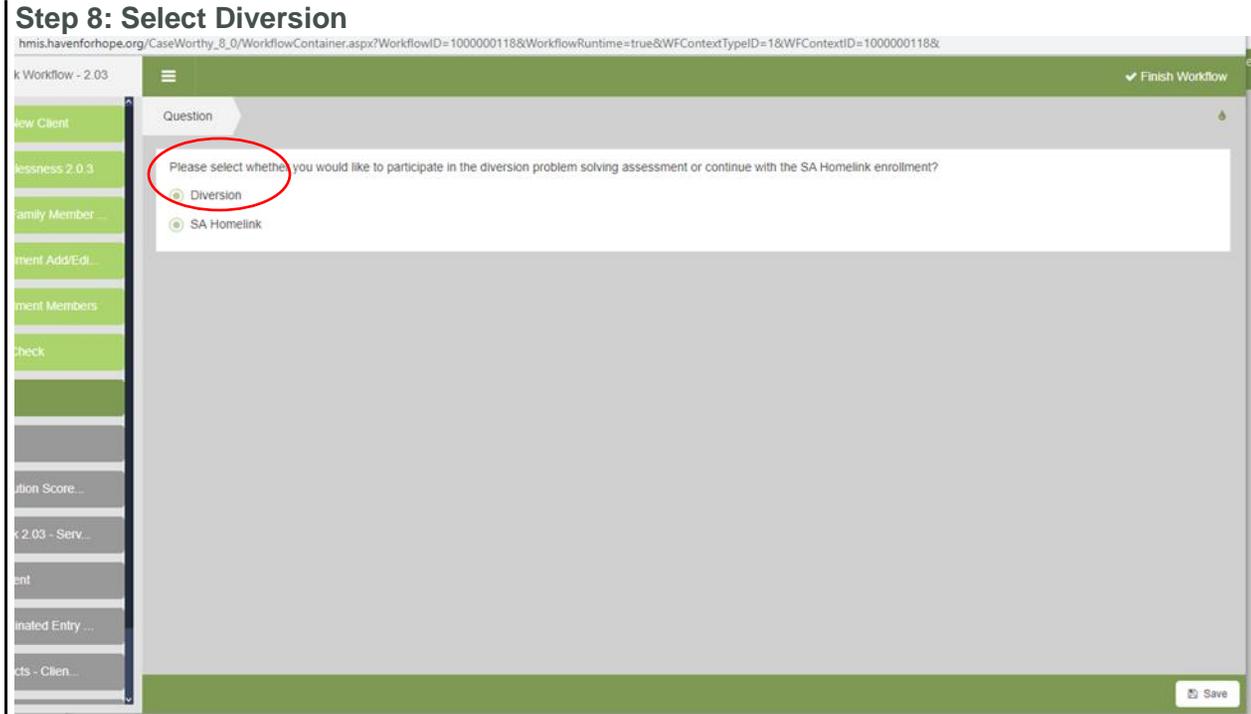


**Step 7a.**

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

**Step 8: Select Diversion**

- Click Diversion
- Click Save



### Step 9. Diversion Problem-Solving Assessment (DP SA)

- ❖ 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 9. Diversion Problem-Solving Assessment (DP SA)

The screenshot shows a web-based form titled "Problem Solving Assessment". The form has a green header bar with a "Finish Workflow" button. The main content area is white and contains three questions:

1. Where did you sleep last night?
2. Was it a safe location? \*
3. Could you stay in the place that you stayed last night? \*

At the bottom right of the form, there is a "Cancel" button.

**Step 9 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 9 cont'd. DPSA**

The screenshot shows the 'Problem Solving Assessment' form in the HMIS/Homelink system. The form is titled 'Problem Solving Assessment' and is part of the 'SA Homelink Workflow - 2.03'. The questions are as follows:

- 1. Where did you sleep last night? (Answer: Staying or living in a friend's room, apartment or house)
- 2. Was it a safe location? (Answer: Yes)
- 3. Could you stay in the place that you stayed last night? (Answer: Yes)
- 3a. If yes, what would you need to help you stay where you stayed last night? (Dropdown menu open showing options: Inactivity, Mover Cost Assistance, Other Financial Assistance, Phone Call, Rental Payment Assistance, Security Deposit Assistance, Traininn & Development)
- 3b. Amount (Field)
- 8. Was Diversion Problem Solving Successful? (Field)
- Has the assessor received SARAH Diversion Training? (Field)

The dropdown menu for question 3a is open, showing a list of assistance options with checkboxes. The options are: Inactivity, Mover Cost Assistance, Other Financial Assistance, Phone Call, Rental Payment Assistance, Security Deposit Assistance, and Traininn & Development. The 'Add Selected' button is visible at the bottom of the dropdown.

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 Homelink 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

Problem Solving Assessment

1. Where did you sleep last night? Staying or living in a friend's room, apartment or house

2. Was it a safe location? \* Yes

3. Could you stay in the place that you stayed last night? \* Yes

3a. If yes, what would you need to help you stay where you stayed last night? \* Choose Options...  
Mover Cost Assistance  
Rental Payment Assistance

3b. Amount \* 0

8. Was Diversion Problem Solving Successful? \* Yes, client will be enrolled in the SA

Has the assessor received SARAH Diversion Training? \*

Diversion Cancel

### 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

Not secure | hmis.havenforhope.org/CaseWorthy\_8\_0/WorkflowContainer.aspx?WorkflowID=100000118&WorkflowRuntime=true&WFContextTypeID=1&WFContextID=100000118&

SA Homelink Workflow - 2.03 Finish Workflow

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 different date will be adjusted to earlier or later date as necessary.**

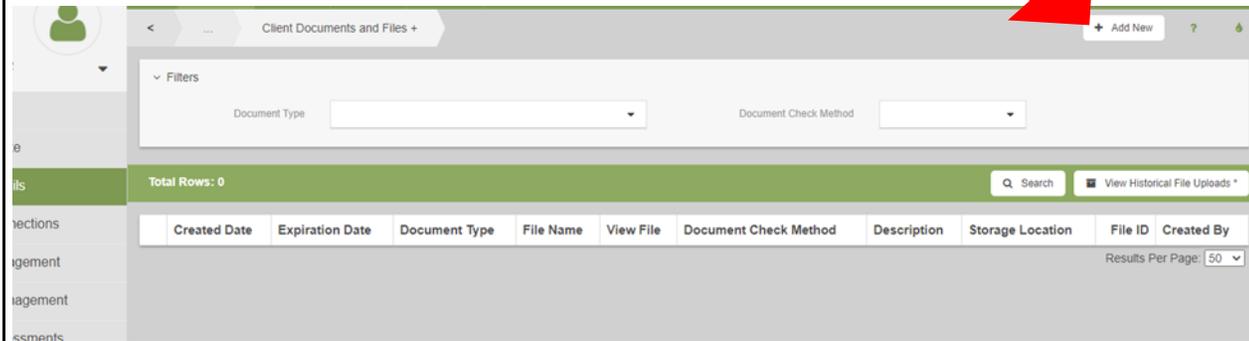
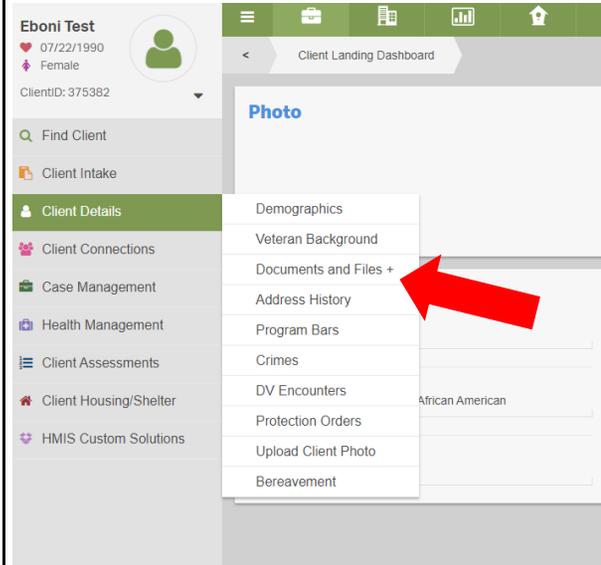
Family	Test,Eboni-1990-07-22	Program Name	SA Homelink CE
Enrollment Status	Assessments Pending	Organization	South Alamo Regional Alliance for the Homeless
Account		Provider Name	SARAH
Begin Date *	10/04/2020	End Date *	Open
Restriction	Shared		
Status	Enrolledhttps://hmis.havenforhope.org/CaseWorthy_8_1		

Save Cancel

**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.

**Step 9: Supporting Documentation**



# SARAH Homeless Diversion Pilot HMIS/Homelink 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 Check

Document Type *	Default Verification Method	Storage Location *	Upload File	Created Date	Expiratio
<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"/> SPPAT 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"/>	10/04/2020	

Case Note

Restriction

DD214

**Part II: Homeless Diversion Pilot Procedural Additional Information**

1. Participating Agencies must be a Homelink access point or network partner.
2. Participating Agencies will need to identify a Homelink person of contact (POC).
3. Persons conducting DPSA must be Certified in Diversion Problem-Solving<sup>1</sup>.
4. Diversion Problem Solving Assessments must be documented in HMIS Homelink 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 needs<sup>2</sup> as a housing solution will be able to pick up a \$100 HEB gift card.<sup>3</sup>
9. Agencies will have the option to submit Intent to Invoice forms by the 2nd business day of each month.<sup>4</sup>

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

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

<sup>3</sup> 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 Director of Systems, Eboni Jett at [EboniJett@sarahomeless.org](mailto:EboniJett@sarahomeless.org).

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

**PART IV: Attachments**

- A. [Click here to access the HMIS Client Release of Information form](#)