



**HPRP INTAKE JOB AID**

---

**HPRP INTAKE**

**HMIS JOB AID**

**Version 1.0**



## TABLE OF CONTENTS

OVERVIEW.....	3
INSTALL FIREFOX .....	3
INTAKE.....	4
REMEMBER TO . . . ..	15



## HPRP INTAKE JOB AID

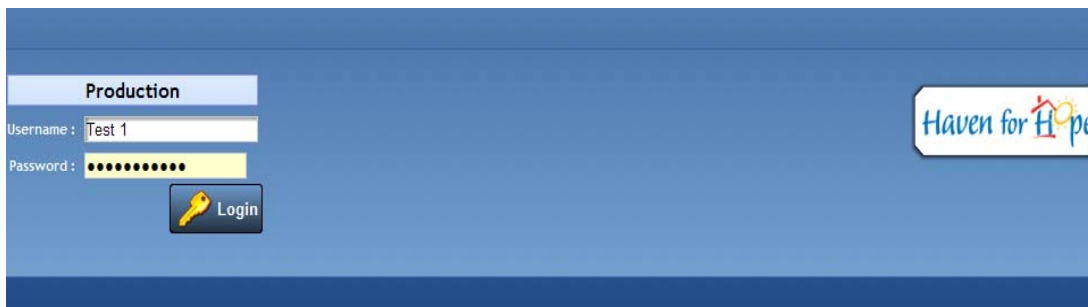
---

### OVERVIEW

Data entry for the HPRP programs is to be accomplished using a HMIS application, which is accessible from the following URL link:

[https://beta.empoweredsg.net/HavenForHope\\_Prod.ecm](https://beta.empoweredsg.net/HavenForHope_Prod.ecm)

A user login is required to access the system. Requests for HPRP login should be submitted to DCI's MIS department.




HPRP system problems and change requests should also be submitted to DCI's MIS department. Once a correction/change has been approved, the appropriate modification(s) to the system will be implemented.

This job aid demonstrates the HPRP Intake process in HMIS.

### INSTALL FIREFOX

In order to use the new HMIS system, you must use Mozilla Firefox as your web browser on your system. You can go to the Mozilla website, <http://www.mozilla.com>, to download the software and install on your system. The system will not function correctly with Internet Explorer (IE).



The Mozilla Firefox icon, , appears on your desktop when the software installed successfully.



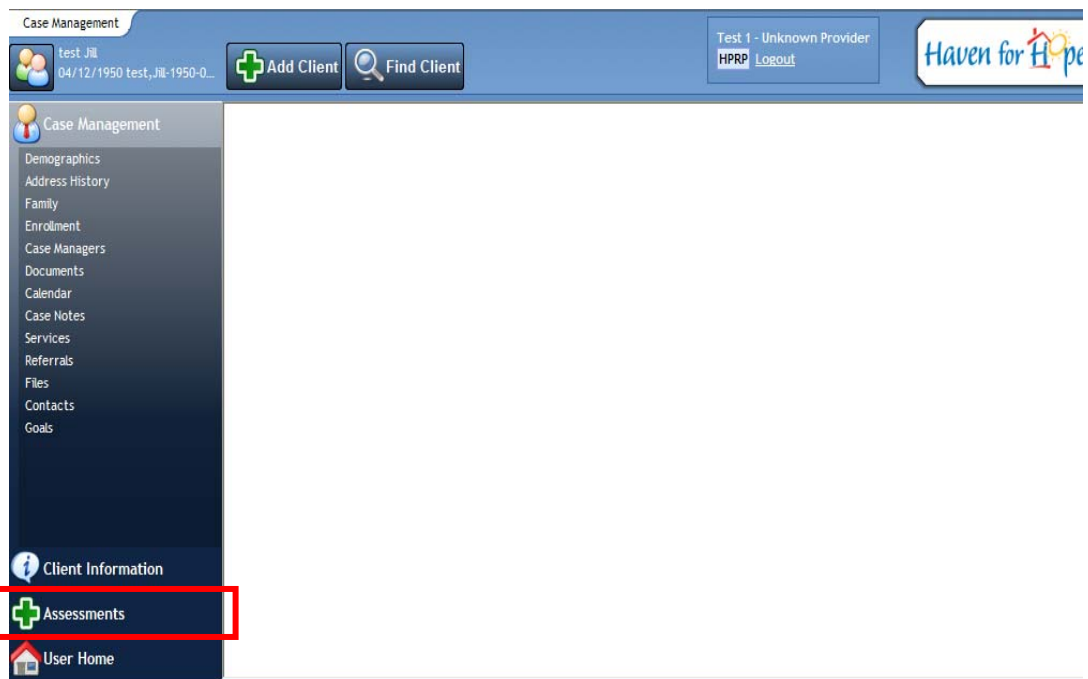
## HPRP INTAKE JOB AID

### INTAKE

For the sake of demonstrating all the screens in the system, the user login, Test 1, was assigned to the **HPRP** role. This job aid will show that the client, TESTER123 DELETE, will be considered the “Head of Household”.



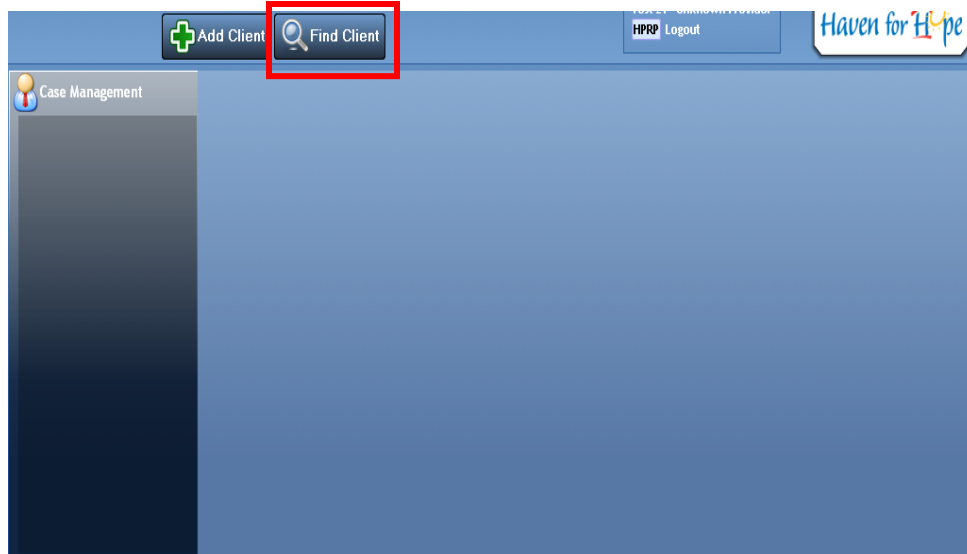
Select '**Assessments**' from the menu options.



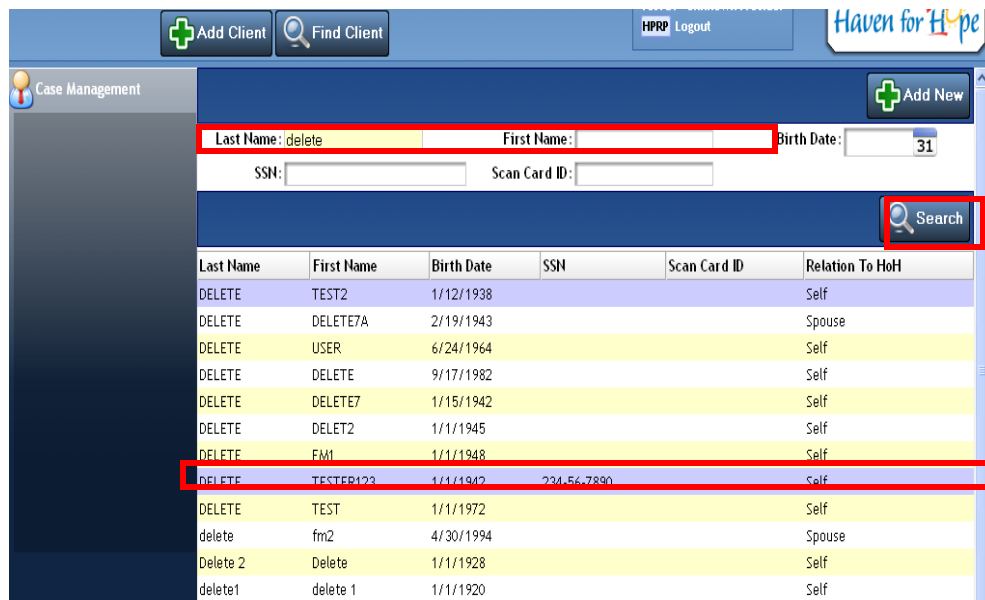


## HPRP INTAKE JOB AID

**NOTE:** After logging in to the system and the menu options information does not appear under Case Management section, find a client by clicking on the '**Find Client**' button. (See example below)



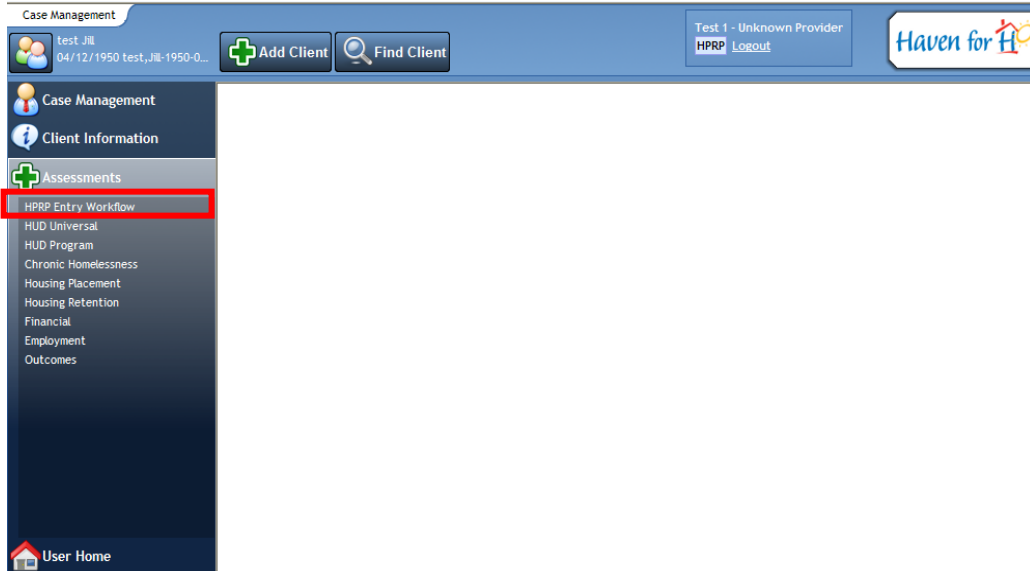
Type in last name and/or first name of a client, click on the '**Search**' button, and then select the client's name.



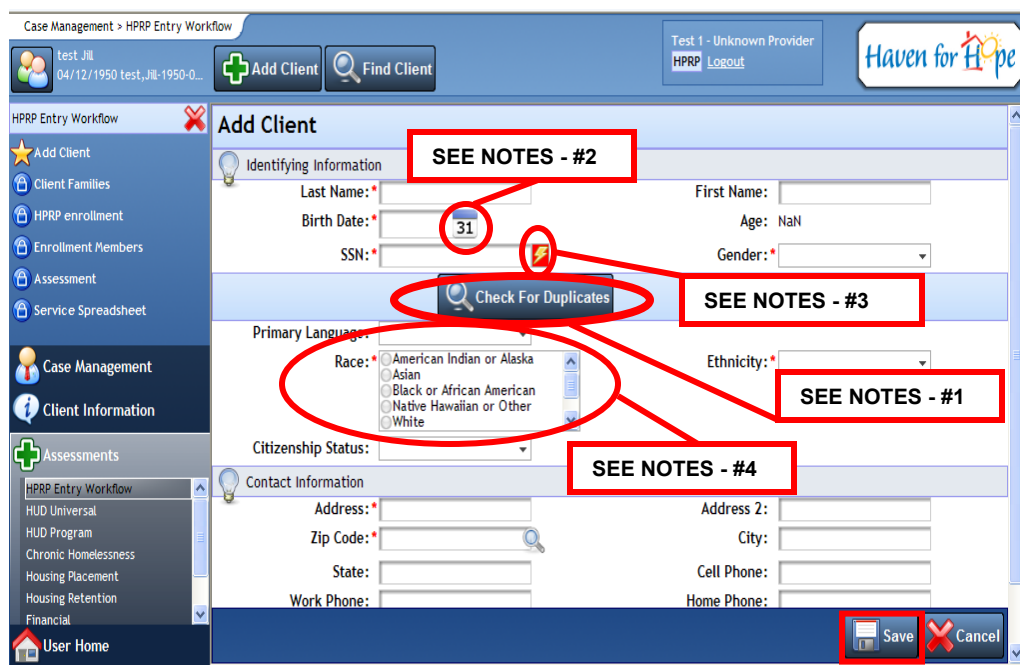


## HPRP INTAKE JOB AID

Select '**HPRP Entry Workflow**'.



On the Add Client form, enter client information and click on the '**Save**' button.





## HPRP INTAKE JOB AID

### NOTES:

#### 1. Duplicate Records

To avoid duplicate records for a client, you should verify duplicate accounts before entering all of the client's information. Type the last and first name of the client. If the client is not a duplicate, then select '✓ **This is a new client**'. If the client is a duplicate, then select the correct client listed in the window.

**Add Client**

Identifying Information

Last Name: \* DELETE First Name: TESTER123


Birth Date: \* 31 Age: NaN

SSN: \* Gender: \*

Check For Duplicates ✓ This is a new client

Name	SSN	Birth Date
------	-----	------------

#### 2. Birth Date

Instead of typing in the birth date, you can click on the icon labeled '31', , and a calendar appears. Select the client's year of birth, month of birth, and then day of birth. The client's date of birth appears in the 'Birth Date' field.

**Family Member Lookup**

Identifying Information

Last Name: \* First Name: \*

Birth Date: \* 04/30/2010 31 Age: NaN

SSN: \* Gender: \*

Primary Language: \*

Race: \*

Ethnicity: \* Non-Hispanic or Latir

Citizenship Status: \*

Relation to HOH: \*


Contact Information

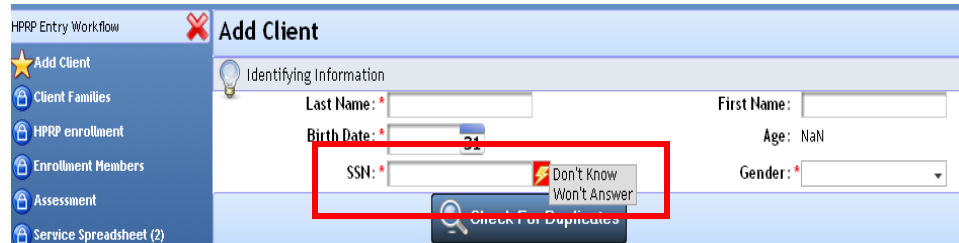
April 2010						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	



## HPRP INTAKE JOB AID

### 3. SSN

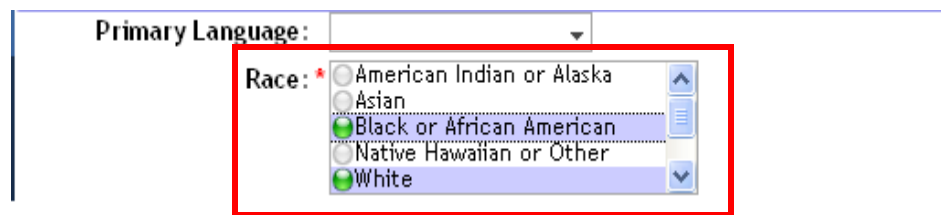
If a client refuses to provide a SSN, then you can click on the lightning bolt, , and select 'Don't Know' or 'Won't Answer'.



The screenshot shows the 'Add Client' form in the HPRP Entry Workflow. The 'Identifying Information' section includes fields for Last Name, First Name, Birth Date, Age, SSN, and Gender. The SSN field is highlighted with a red box, and a dropdown menu is open showing 'Don't Know' and 'Won't Answer' options. A lightning bolt icon is visible next to the SSN field.

### 4. Race

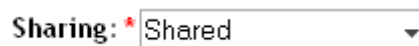
You can select multiple races by clicking on the button to the left of the race listed.



The screenshot shows the 'Race' selection dropdown menu. The dropdown is open, showing options: American Indian or Alaska, Asian, Black or African American, Native Hawaiian or Other, and White. The 'Black or African American' option is selected. A red box highlights the dropdown menu.

### 5. Shared

The system defaults to 'Shared' in order to share information.



The screenshot shows the 'Sharing' dropdown menu. The dropdown is open, showing the option 'Shared'.

### 6. HOH

The system automatically assigns the initial client (Self) as the Head of Household (HOH).



## HPRP INTAKE JOB AID

Click on the '**Add Family Member**' button to enter additional family members.

The screenshot shows the 'Client Families' section of the HPRP system. At the top right, there is a 'Haven for Hope' logo and a user profile for 'Test 1 - Unknown Provider'. Below this, there are 'Add Client' and 'Find Client' buttons. The main area displays a table of family members. A red box highlights the '+ Add Family Member' button in the top right corner of the table area.

Family Member*	Relationship*	Date Added*	Date Removed
✓ TESTER123	Self	4/20/2010	Present

Click on the magnifying glass to search for a family member.

The screenshot shows the 'Client Families' section with a search bar highlighted by a red box. The search bar contains the text 'FM1' and has a magnifying glass icon. The table below shows a search result for 'FM1' with a relationship of 'Self', a date added of '4/30/2010', and a date removed of 'Present'.

Family Member*	Relationship*	Date Added*	Date Removed
✓ FM1	Self	4/30/2010	Present

When the Family Member Lookup window appears, type the name of the family member and click on the '**Search**' button. If the system finds a family member, then select the family member. Otherwise, you can click on '**Add New**' button to add a family member.

The screenshot shows the 'Family Member Lookup' window. It has a search bar at the top with a magnifying glass icon. Below the search bar are input fields for 'Last Name:', 'First Name:', 'Birth Date:', 'SSN:', and 'Scan Card ID:'. The 'Birth Date' field has a date picker showing '31'. A red box highlights the '+ Add New' button in the top right corner. Another red box highlights the 'Search' button at the bottom right.



## HPRP INTAKE JOB AID

After entering all of the family member information, click on **'Save'**.

**Family Member Lookup**

**Identifying Information**

Last Name: \* [ ] First Name: [ ]  
Birth Date: \* [ 31 ] Age: NaN  
SSN: \* [ ] Gender: \* [ ]

**Check For Duplicates**

Primary Language: [ ]  
Race: \*  American Indian or Alaska  
 Asian  
 Black or African American  
 Native Hawaiian or Other  
 White  
Ethnicity: \* Non-Hispanic or Latir  
Citizenship Status: [ ] Relation to HOH: \* [ ]

**Contact Information**

Address: \* 3454 RIVER LANE Address 2: [ ]  
Zip Code: \* 78228 City: SAN ANTONIO  
State: TX Cell Phone: [ ]  
Work Phone: [ ] Home Phone: [ ]

**Save** **Cancel**

Click on **'Save'**.

**Case Management**

DELETE TESTER123  
01/01/1942 DELETE, TESTER...

**Client Families**

Family Member*	Relationship*	Date Added*	Date Removed
✓ TESTER123	Self	4/20/2010	Present
✗ TESTERABC	Spouse	04/20/2010 31	Present 31

**Save** **Cancel**



## HPRP INTAKE JOB AID

Select enrollment information and then click on the 'Save' button.

The screenshot shows the 'HPRP enrollment' form. The 'Family' field is populated with 'DELETE,TESTER123-1942-01-01'. The 'Begin Date' is '04/20/2010' and the 'End Date' is 'Present'. The 'Enroll current client' checkbox is checked. The 'Follow up' checkbox is unchecked. The 'Save' button is highlighted with a red box.

You must enroll **all** family members. You need to click on the box, , next to the family member's name. A green check, , appears that indicates the family member is enrolled. After enrolling all the family member, click on 'Save'.

The screenshot shows the 'Enrollment Members' table. The table has the following data:

	First Name	Last Name	Provider*	Restriction*
<input checked="" type="checkbox"/>	TESTER123	DELETE	Unknown Provider	Shared
<input type="checkbox"/>	TESTERABC	DELETE		

The 'Save' button is highlighted with a red box.



## HPRP INTAKE JOB AID

Enter data information and fill in all the required fields. Click on 'Save'.

Case Management

DELETE, TESTER123  
01/01/1942 DELETE,TESTER12

+ Add Client Find Client

Test 1 - Unknown Provider  
HPRP Logout

Haven for Hope

HPRP Entry Workflow

Enrollment Members

Assessment

DELETE, TESTER123

HUD Universal Data

Financial

Service Spreadsheet (2)

Case Management

Demographics

Address History

Family

Enrollment

Case Managers

Documents

Calendar

Case Notes

Services

Client Information

Assessments

User Home

**DELETE, TESTER123 - HUD Universal Data**

HUD Universal Intake

Assessment: 4/21/2010 - SAMM HPRP (Federal) Program - At Entry

Veteran Status: Don't Know

Housing Status: Don't Know

Disabling Condition: Don't Know

Health Insurance: Don't Know

This is my Test Page information

Prior Residence: Don't Know

Prior Zip Code:

Length Of Stay At Prior Residence:

Save Cancel

**NOTE:** Fields containing the red asterisk, “\*”, are required field and must be filled out.

Click on the box, , near **Income or Expenses Type\*** field. Enter client's income/expense and then click on the 'Save' button.

HavenForHope\_Prod - 1.1 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://beta.empoweredsg.net/HavenForHope\_Prod.ecm

Most Visited Getting Started Latest Headlines

HavenForHope\_Prod - 1.1

Case Management

DELETE, TESTER123  
01/01/1942 DELETE,TESTER12

+ Add Client Find Client

Test 1 - Unknown Provider  
HPRP Logout

Haven for Hope

HPRP Entry Workflow

Enrollment Members

Assessment

DELETE, TESTER123

HUD Universal Data

Financial

Service Spreadsheet (2)

Case Management

Demographics

Address History

Family

Enrollment

Case Managers

Documents

Calendar

Case Notes

Services

Client Information

Assessments

User Home

**DELETE, TESTER123 - Financial**

Assessment: 4/21/2010 - SAMM HPRP (Federal) Program - At Entry

Income or Expense Type\* Amount\*

: \$0.00

Save Cancel

**NOTE:** Must collect a financial assessment every 3-months.



## HPRP INTAKE JOB AID

Select the proper program from drop-down list. Click on the '**Search**' button. After the service listing appears, select the service(s) for the client by clicking on the box, .

The screenshot shows the 'Service Spreadsheet (2)' interface. The 'Program' dropdown menu is set to 'SAMM HPRP (Feden)'. The 'Search' button is visible. The table below shows the following services:

Begin Date	Service	Units*	Total
<input type="checkbox"/>	Rental Payment Assistance - HPRP	0.00	
<input type="checkbox"/>	Security Deposits - HPRP	0.00	
<input type="checkbox"/>	Utility Deposit - HPRP	0.00	
<input type="checkbox"/>	Utility Payment - HPRP	0.00	
<input type="checkbox"/>	Moving Cost Assistance - HPRP	0.00	
<input type="checkbox"/>	Case Management - HPRP	0.00	
<input type="checkbox"/>	Outreach and Engagement - HPRP	0.00	
<input type="checkbox"/>	Housing Search and Placement - HPRP	0.00	
<input type="checkbox"/>	Legal Services - HPRP	0.00	
<input type="checkbox"/>	Credit Repair - HPRP	0.00	
<input type="checkbox"/>	Medium Term Rental Pymt Assist (4-6 months) - HPRP	0.00	
<input type="checkbox"/>	FINANCIAL LITERACY - HPRP	0.00	
<input type="checkbox"/>	FINANCIAL COACHING - HPRP	0.00	

Enter in the dollar amount. Click '**Save**'.

The screenshot shows the 'Service Spreadsheet (2)' interface with the 'Units\*' column highlighted in red. The 'Save' button is also highlighted in red. The table below shows the following services:

Begin Date	Service	Units*	Total
04/21/2010 31	Rental Payment Assistance - HPRP	1	0
<input type="checkbox"/>	Security Deposits - HPRP	0.00	
<input type="checkbox"/>	Utility Deposit - HPRP	0.00	
<input type="checkbox"/>	Utility Payment - HPRP	0.00	
<input type="checkbox"/>	Moving Cost Assistance - HPRP	0.00	
<input type="checkbox"/>	Case Management - HPRP	0.00	
<input type="checkbox"/>	Outreach and Engagement - HPRP	0.00	
<input type="checkbox"/>	Housing Search and Placement - HPRP	0.00	
<input type="checkbox"/>	Legal Services - HPRP	0.00	
<input type="checkbox"/>	Credit Repair - HPRP	0.00	
<input type="checkbox"/>	Medium Term Rental Pymt Assist (4-6 months) - HPRP	0.00	
<input type="checkbox"/>	FINANCIAL LITERACY - HPRP	0.00	
<input type="checkbox"/>	FINANCIAL COACHING - HPRP	0.00	

**Note:** A client must enroll in a program for HPRP enrollment in order to receive a service.



## HPRP INTAKE JOB AID

All required steps have been completed.

Case Management

DELETE TESTER123  
01/01/1942, DELETE, TESTER12

[Add Client](#) [Find Client](#)

Test 1 - Unknown Provider  
HPRP Logout

Haven for Hope

Case Management

**Case Management**

Demographics  
Address History  
Family  
Enrollment  
Case Managers  
Documents  
Calendar  
Case Notes  
Services  
Referrals  
Files  
Contacts  
Goals

**Client Information**

Assessments

User Home

**HPRP Entry Workflow is now complete.**

Status	Step Name	Completed By	Completed Date
	Add Client	Test 1	4/21/2010 10:14:00 AM
	Client Families	Test 1	4/21/2010 10:17:00 AM
	HPRP enrollment	Test 1	4/21/2010 10:17:00 AM
	Enrollment Members	Test 1	4/21/2010 10:19:00 AM
	Assessment	Test 1	4/21/2010 10:31:00 AM
	DELETE, TESTER123		
	HUD Universal Data	Test 1	4/21/2010 10:25:20 AM
	Financial	Test 1	4/21/2010 10:31:05 AM
	Service Spreadsheet [2]	Test 1	4/21/2010 10:41:00 AM



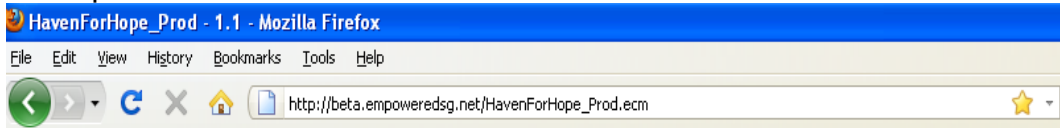
## HPRP INTAKE JOB AID

---

### **REMEMBER TO . . .**

- Use FireFox, as your web browser, for HMIS

Example:



- Fill out all the fields with the red asterisk, “\*”. Fields containing the red asterisk, “\*”, are required fields.
- Must collect a financial assessment every 3-months
- Must enroll all family members
- Logout of the system

Example

