Social Solutions
transforming human services

HMIS User Manual

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Introduction

Welcome to ETO HMIS (Homeless Management Information System Software). ETO HMIS software was designed to be a streamlined process which allows users to enter HUD HMIS specific data elements in order to produce the Annual Performance Report (APR), Quarterly Performance Report (QPR), Homeless Prevention Programs (HPRP) APR and the Annual Homeless Assessment Report (AHAR). Before starting to enter the data, it is best to understand ETO Language.

Enterprise – This is the CoC (Continuum of Care) or Lead Agency which is made up of many agencies.

Site – Each agency is a Site.

Program – A program relates to the services or housing unit for each site. A site can have one or many programs.

Participants – Clients that are or have been enrolled into a program for services.

Demographics – Participant information that generally stays the same for a participant such as First Name, Last Name, Case Number, etc. It also contains HUD Specific Data elements for some of the Universal Demographics.

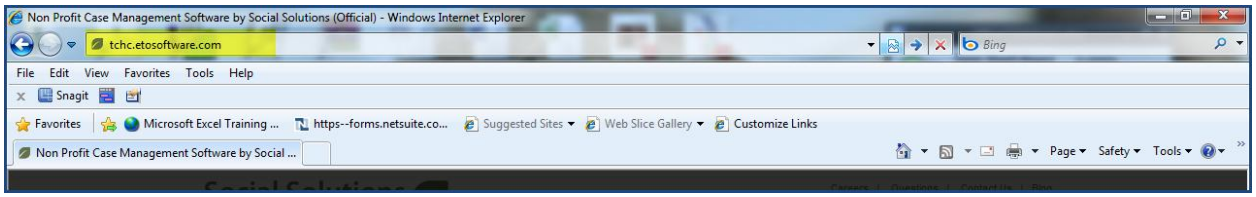
Assessments – Assessments are forms that collect data. In ETO HMIS there are three assessments: 1 HUD Intake, 2 HUD Mid-year (to be taken at least annually) and 3 HUD Exit. The Assessments contain Universal Data elements, Disability information, Employment/Education information, Cash and Non-cash benefits, and Exit information.

Points of Service (Efforts) – Participant services are captured in ETO HMIS as Points of Service. HUD HMIS specific services include: HUD Services, Arizona Matrix, HPRP Financial Assistance, Funds Disbursements, and HPRP Services.

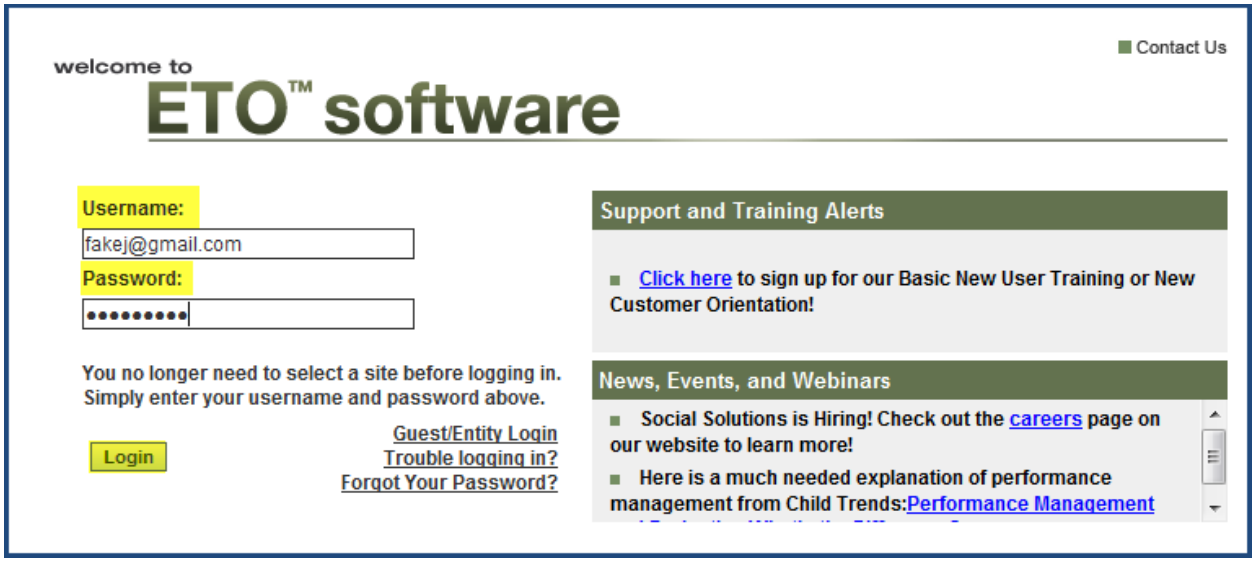
Logging into ETO

Step 1 – Open your Explorer Browser

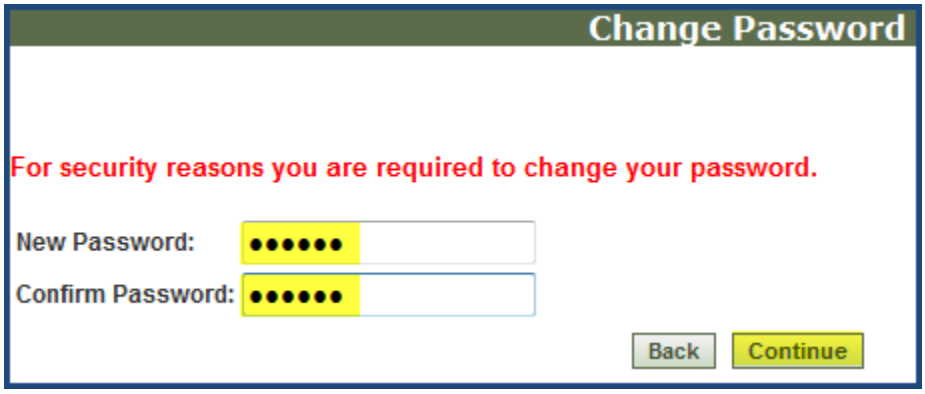
Step 2 – Type your ETO URL into the Explorer Address Bar. (i.e. xxxxxx.etosoftware.com)



Step 3 – Enter your **email address** as your Username. Your password to login for the first time will be given to you by your ETO Administrator. Click the Login button.

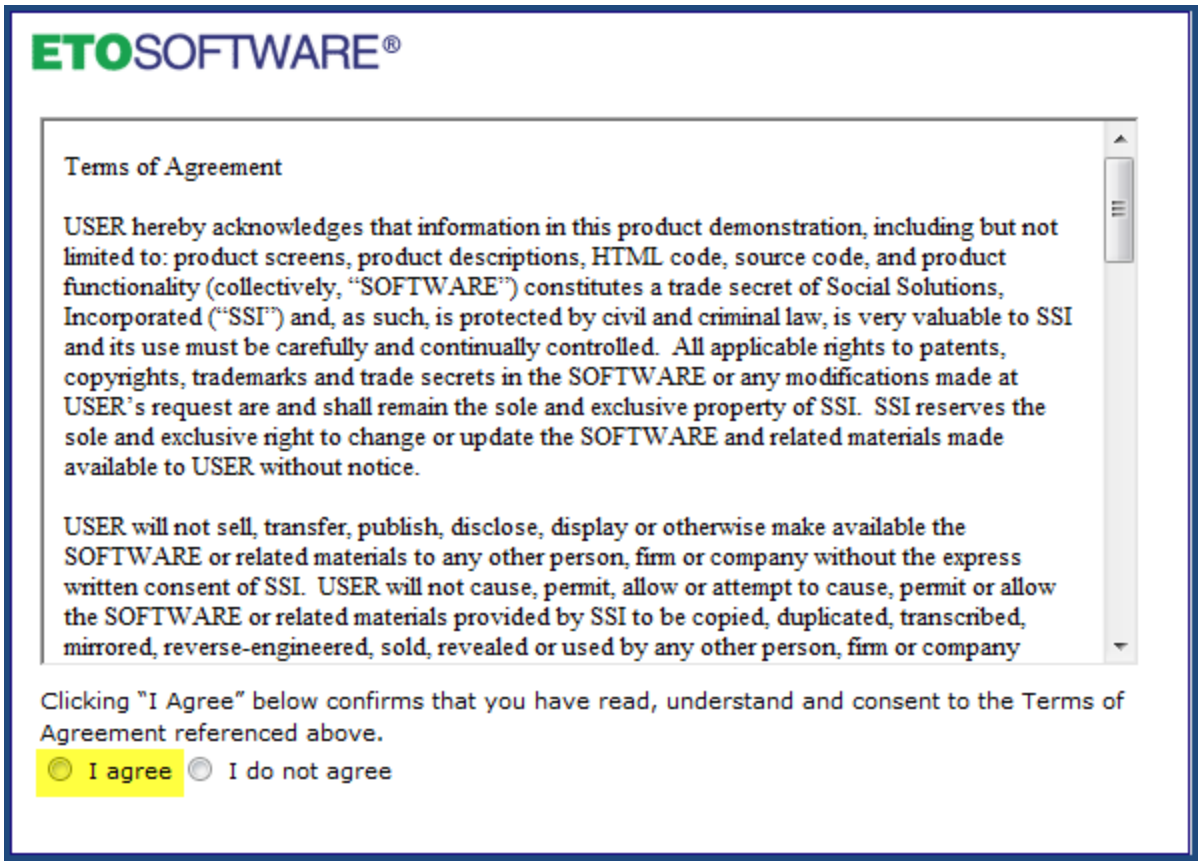


Step 4 – The first time you log into your ETO Account, you will be required to change your password. You need to enter a password that is at least 6 characters which is alpha-numeric. Once you have typed in the new password twice, click Continue.

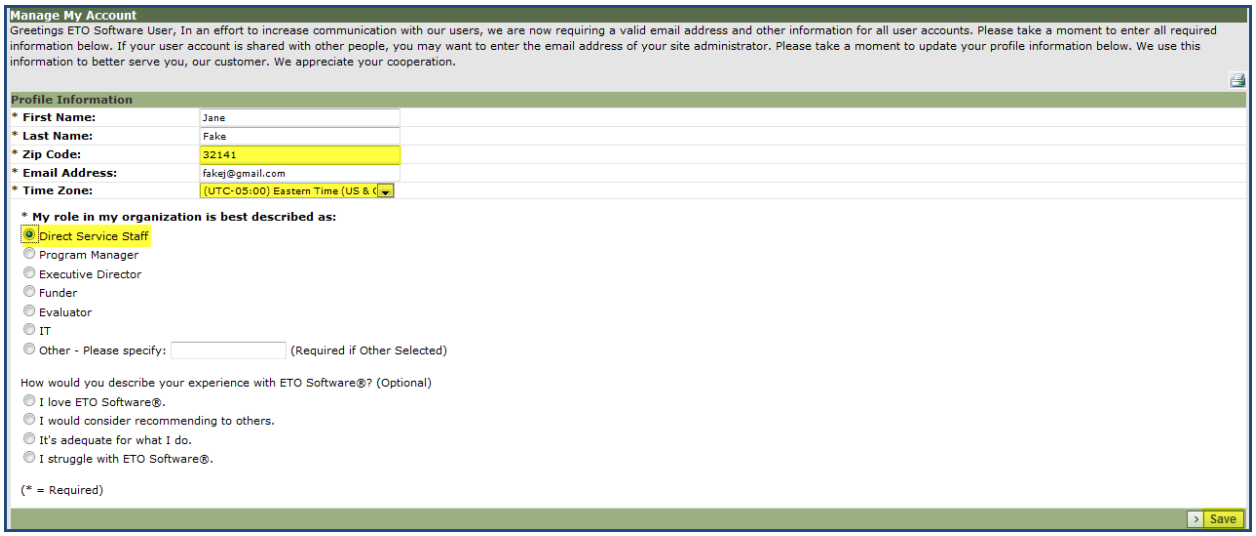


Step 5 – If you have access to more than one ETO Site, you will see a list of all sites you have access to enter. Click the site you wish to work in.

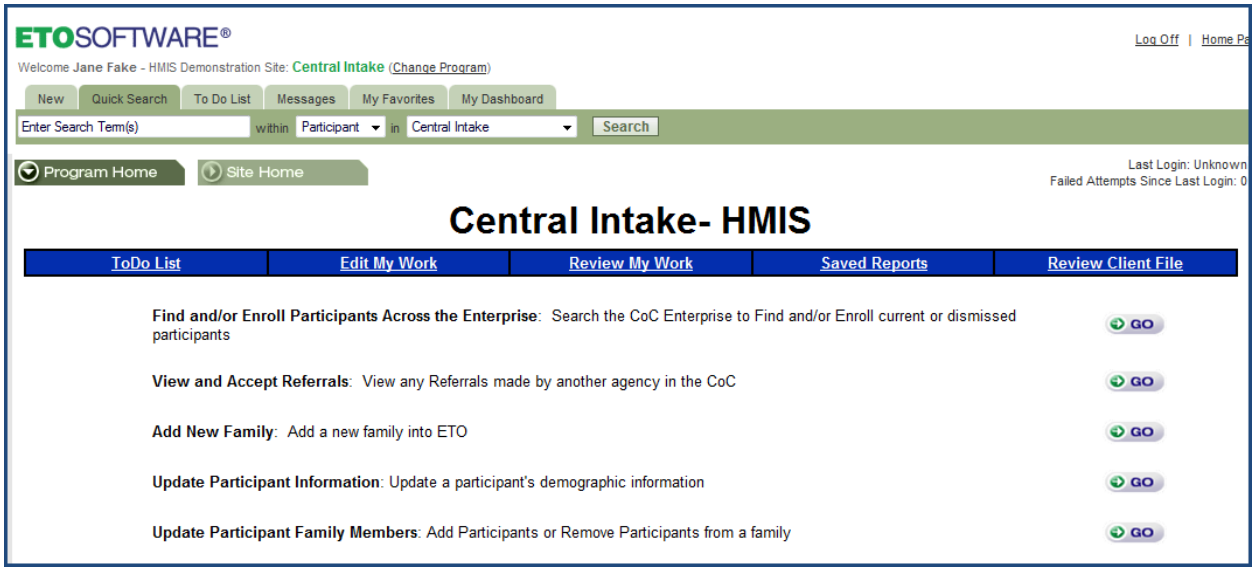
Step 6 – Select, I agree, for the Terms of Agreement. Click Continue.



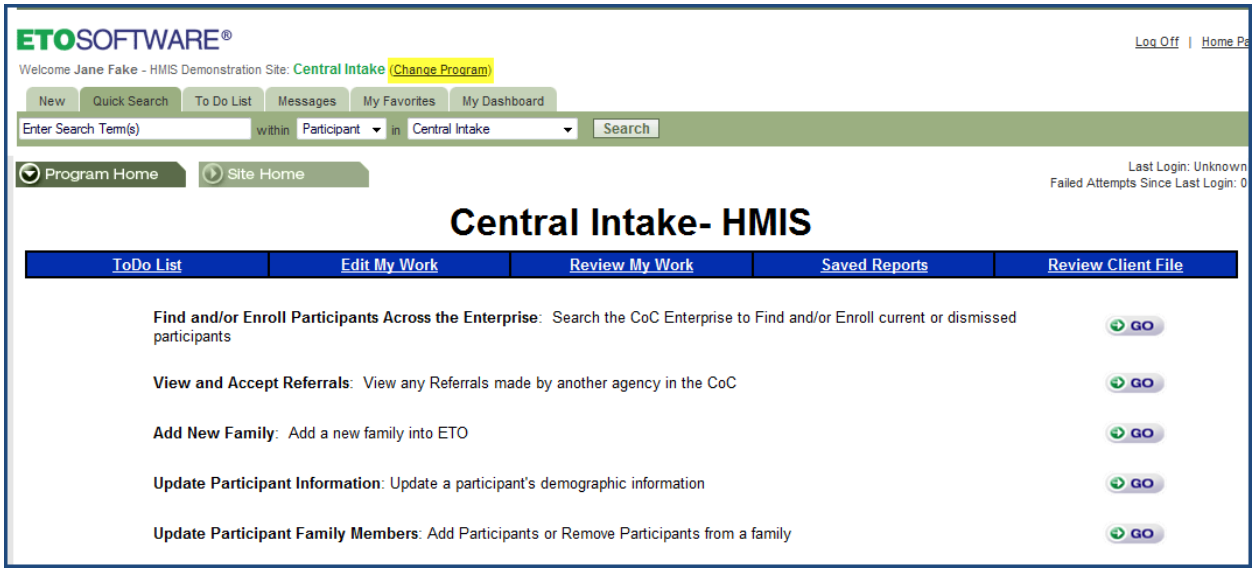
Step 7 – You will see a **Profile** screen. Please enter your office zip code, set your time zone and select your appropriate user role. Click Save when finished.



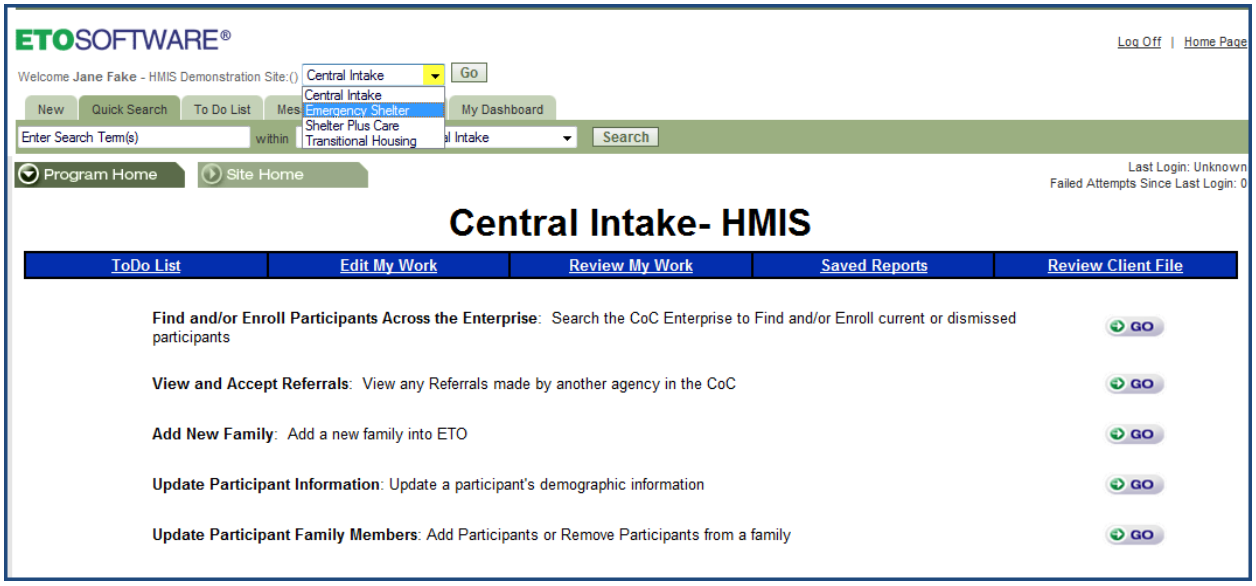
You will be taken to your program's ETO Homepage.



Step 6 – If you have access to more than one Program in your ETO Site, you can change between the programs. Click the Change Program link.



Step 7 – Click the dropdown arrow and select the program you would like to work in. Click the Go Button.


ETOSOFTWARE®
Log Off | Home Page
Welcome Jane Fake - HMIS Demonstration Site:()
Central Intake
Go
Central Intake
Emergency Shelter
Shelter Plus Care
Transitional Housing
New
Quick Search
To Do List
My Dashboard
Enter Search Term(s)
within
Search
Program Home
Site Home
Last Login: Unknown
Failed Attempts Since Last Login: 0
Central Intake- HMIS
ToDo List
Edit My Work
Review My Work
Saved Reports
Review Client File
Find and/or Enroll Participants Across the Enterprise: Search the CoC Enterprise to Find and/or Enroll current or dismissed participants
View and Accept Referrals: View any Referrals made by another agency in the CoC
Add New Family: Add a new family into ETO
Update Participant Information: Update a participant's demographic information
Update Participant Family Members: Add Participants or Remove Participants from a family
GO

ETO HMIS Homepage Description

In the top right corner of your Homepage there are a series of 4 links: Log off, Homepage, My Account, and Help.

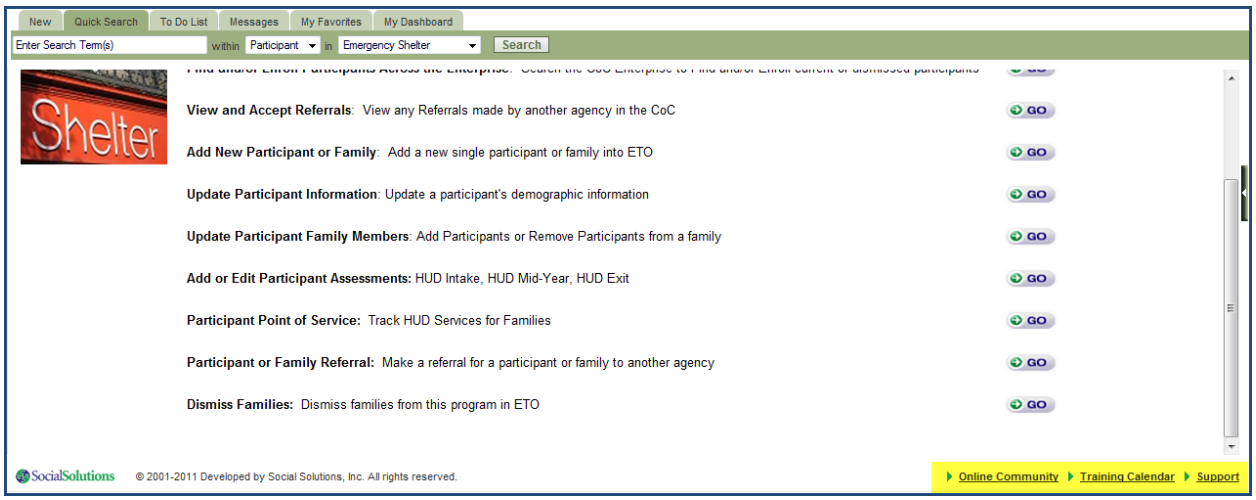
Log Off – Click this link when you are going to log out of ETO Software. If you leave your computer while still logged into ETO, you will be logged out within a specific amount of time chosen by your ETO Administrator.

Home Page – Click the Home Page link whenever you wish to return to the Home Page Screen.

My Account – This is a link you normally will not need to use. One area you may want to explore is the Manage Personal Settings. This is where you can set up preferences for your specific user account in ETO HMIS.

Help – The Help link will take you to our ETO Software Help Manual. Search HMIS to find out more detailed information pertaining to your program.

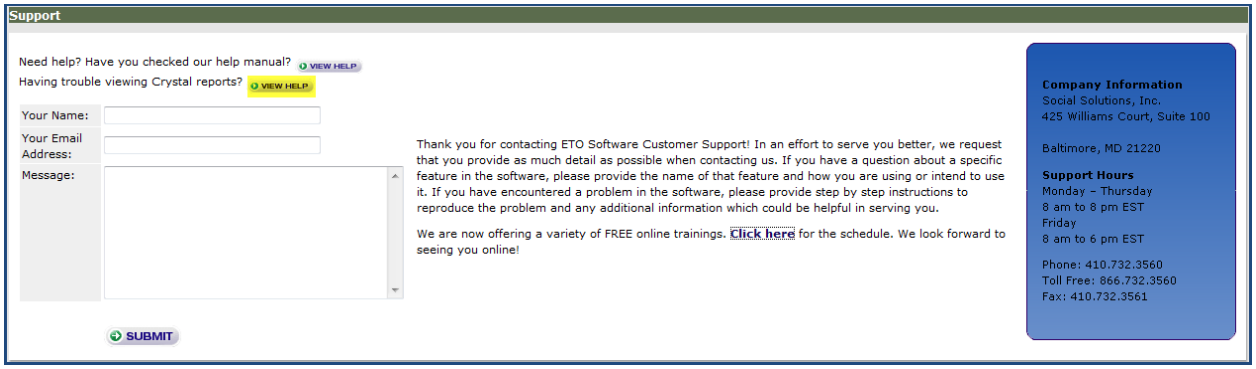
At the bottom right of the Home Page you will see 3 more links for: Support, Training Calendar, and the Online Community.



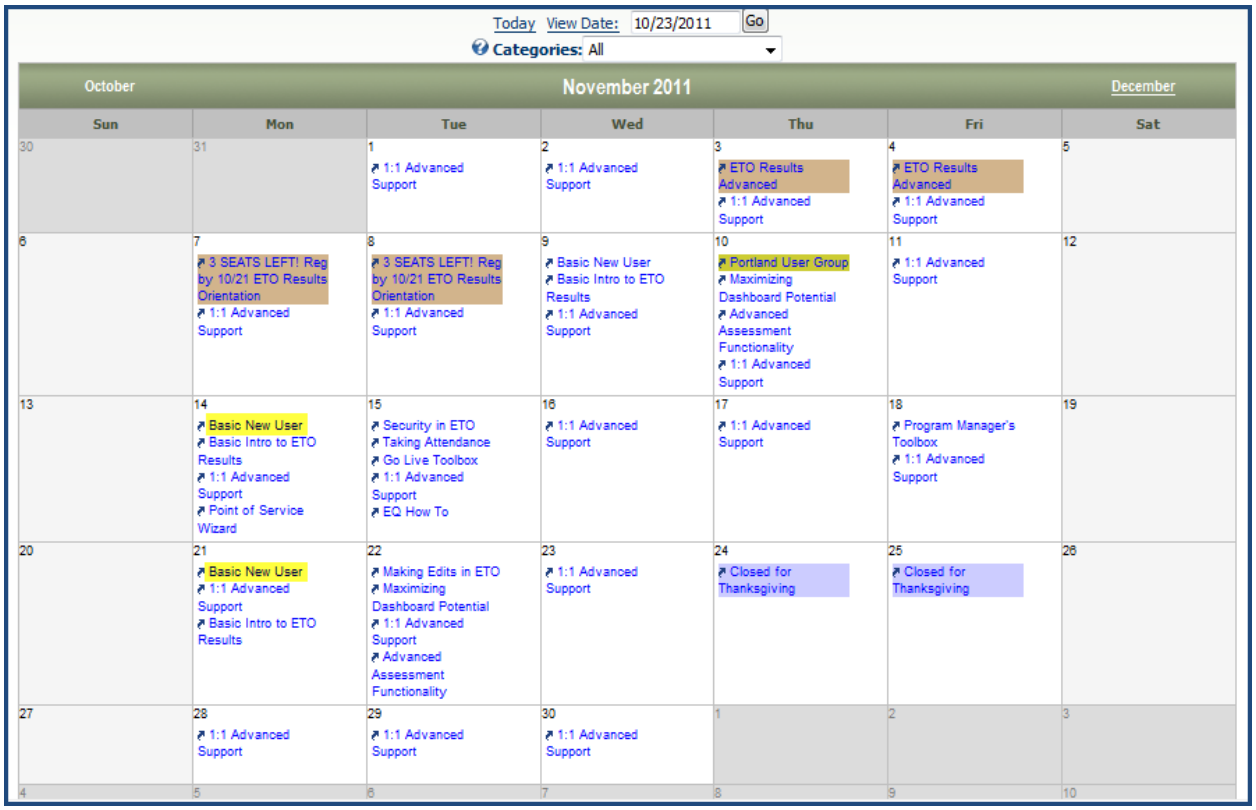
Support - Brings you to the ETO Software Customer Support screen. Our company address and support hours are in the blue highlighted box. The phone number is toll

free and we do not charge customers for support. We do suggest you first contact your ETO Administrator with any questions. If they are not available, or cannot solve your issue you may call or email our Support Team your questions.

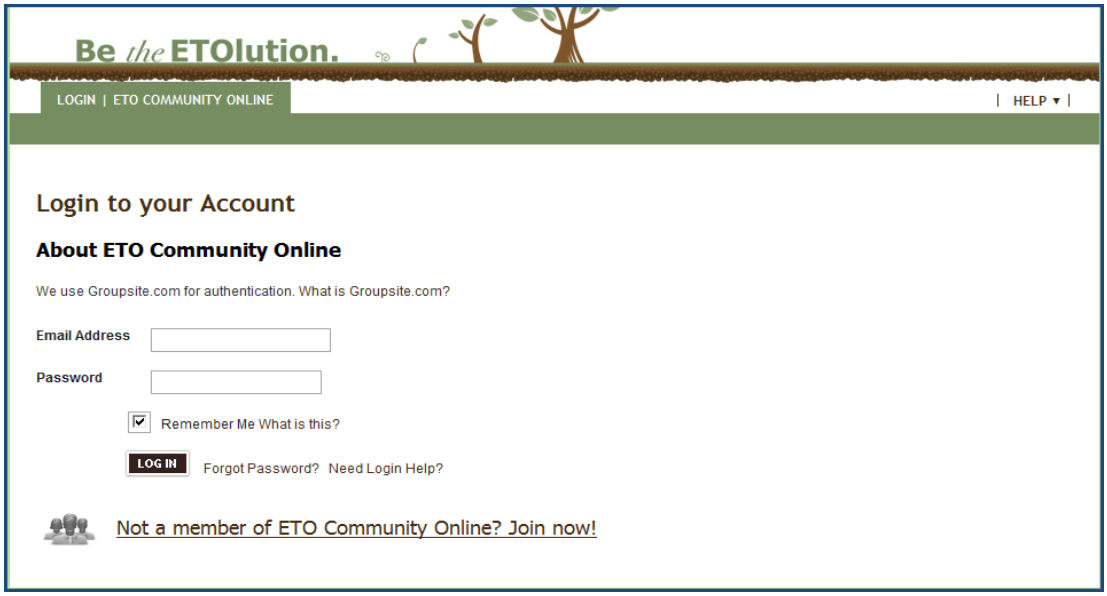
Notice the top left of the screen: Having trouble viewing Crystal reports? Many of the ETO Reports are run by Crystal reports including the QPR. Users will need to load the free Crystal Reports Viewer to run the reports. Click the View Help next to “Having trouble viewing Crystal Reports”. After the Word document opens, click the first link and follow the steps to download the viewer to your computer.



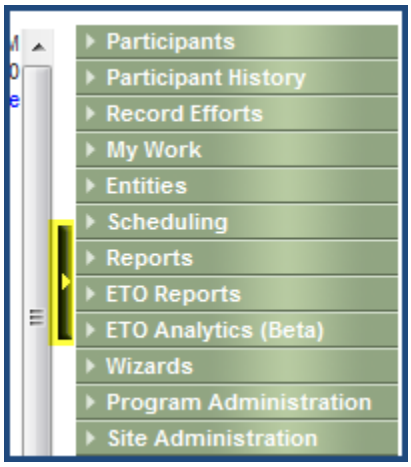
Training Calendar - Our ETO online trainings are listed for each month. Most of our training are free, but some do have a charge. We highly recommended that all new ETO users to take the Basic New User Training. These trainings are usually held on Mondays. Once the link for the training has been clicked, you will see a description of the training, a link to RSVP and a link to download or print the manual for the session.



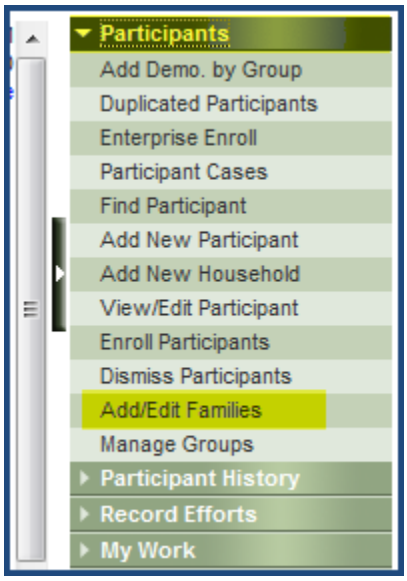
Online Community - ETO hosts an online community blog for all users. You may sign up for a free user account which will allow you access to blog with other ETO staff and users. This is great way to gain new ideas and insight by communicating with ETO users from other organizations who have the same goals as your organization.



Step 6 – To the right of the screen is a navigation bar. This bar also contains links to ETO software functionality. You can open or close the Navigation Bar by clicking the white arrow to the left of the bar.



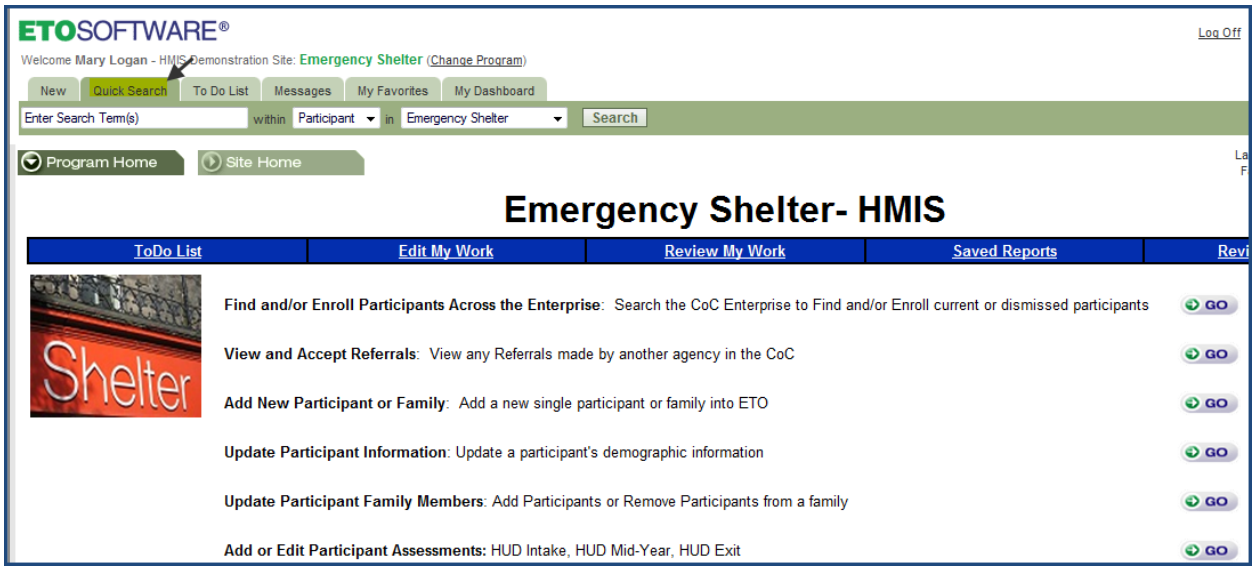
Step 7 – Click the **Functionality Menu Bar** that you wish to use and another dropdown will appear of your functionality choices. If you click the functionality bar of your choice, it will take you to that functionality screen.



ETO HMIS Homepage Tabs

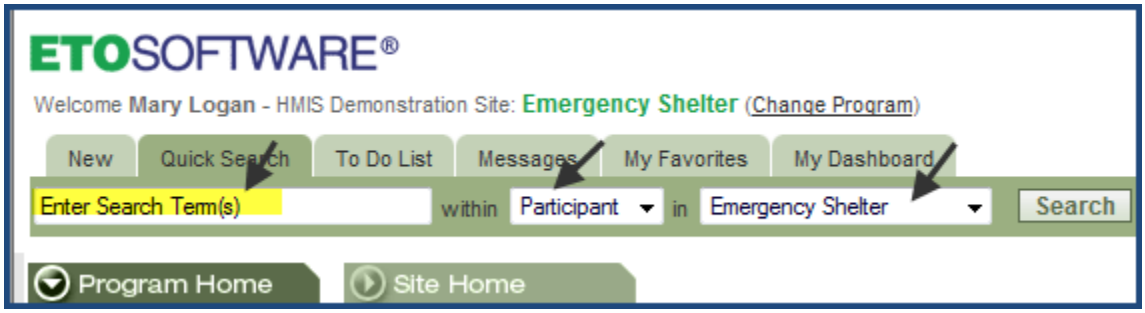
Quick Search

Your Homepage defaults to the Quick Search tab highlighted in the upper left hand corner.



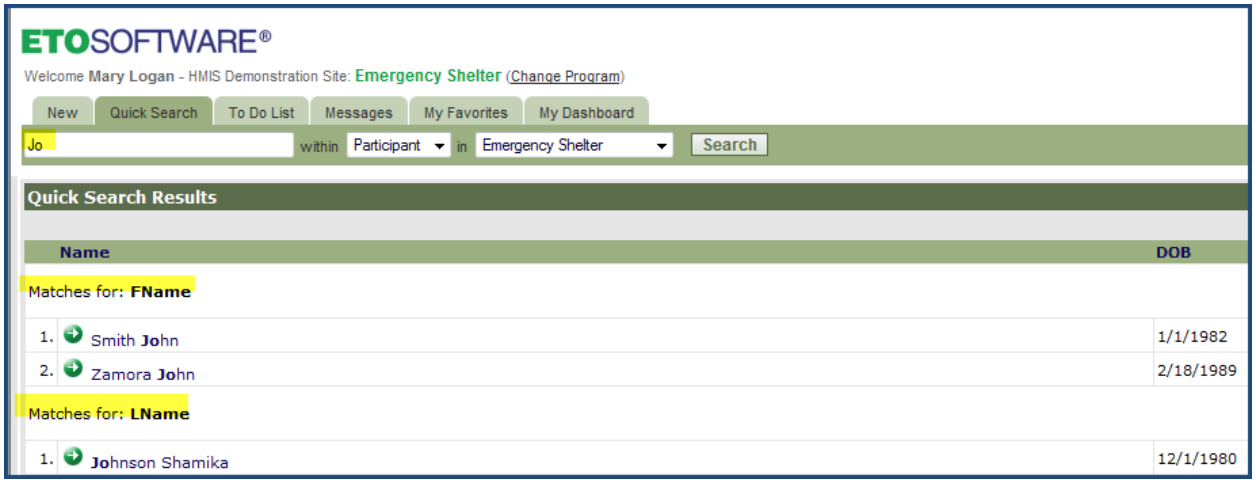
The **Quick Search** tab is used (or may be used) for a fast and easy search of a Participant, Entity or Staff in ETO Software. You can search across a Program, Site, or across the Enterprise (if an Enterprise Administrator).

Example of a Quick Search:



Step 1 - 1st arrow from the left: *Enter Search Term(s)* in the highlighted box above. Search terms may include full or partial first or last name, as well as any other criteria defined by your ETO Administrator, such as DOB or SSN. If the search criteria were "Jo" as a search term, Participants with the first or last name including "Jo" would be

returned in the results. First Name matches are listed first, followed by Last Name matches.



Step 2 - 2nd arrow from the left: Within "Participants" is an example of a Quick Search for participants. By default, the search will conduct a search on Participants.

Participants- Set to search by partial or full Last Name, SSN, or Case Number. These options can be modified on the *Manage Demographics* page; where there are columns titled allow and return with quick search.

Entities- Enter partial or full Entity Name, Type, or Sub-Type

Reports- Enter partial of full *Crystal Report n*ame or *Custom* Search term

Step 3 - 3rd arrow from the left: Focuses on the *Scope* of your Search

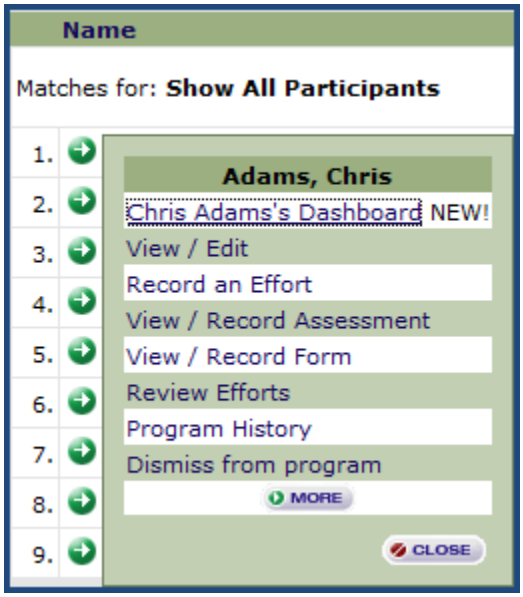
- **Program**
- **Across the Site**
- **Across All Sites** (Only if an Enterprise Edition chooses to make this available to an enterprise administrator)

Step 4 - Click **Search**

Program Specific Quick Search

This is an example of program specific search results. This search is similar to the *View/Edit Participant* feature.

Note: This feature is particularly useful for case management work. By clicking on the arrow next to any of these names the quick link options appear.

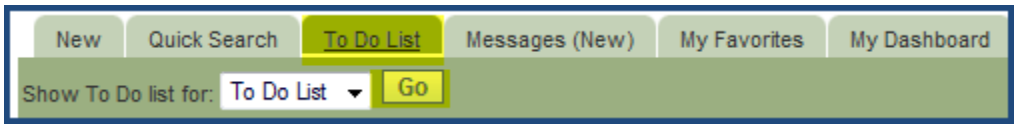


To Do List

This gives you quick access to a range of ETO Software To Do Lists to help you best manage your work. Reminders can be added to the To Do List through the following features:

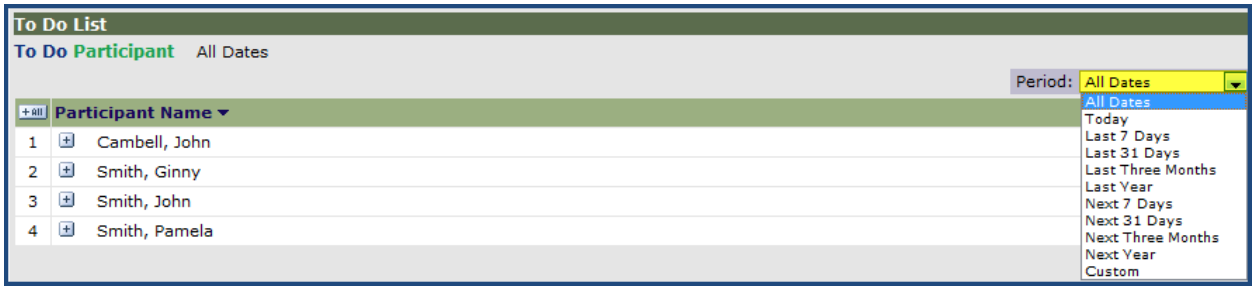
- **Record Participant Efforts**
- **Referral Information**
- **Points of Service**

Step 1 – Click the **To Do List** Tab. Click the **Go** button next to the Show To Do List for: To Do List.

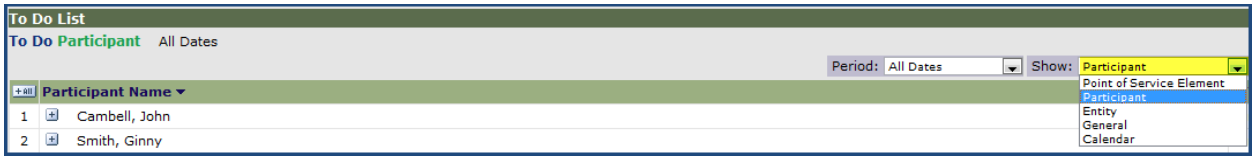


Step 2 – You can select the setting of how you would like your To Do List to appear.

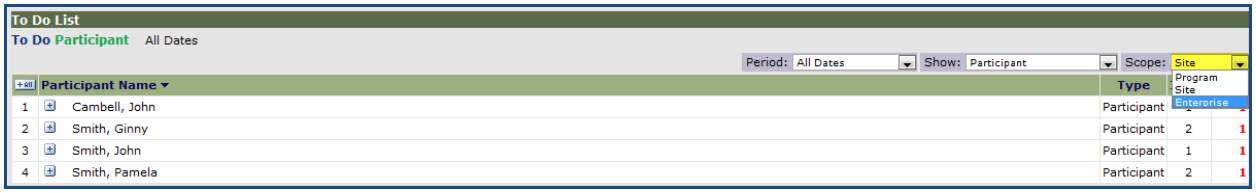
In the Period: dropdown, select how many days you would like to review.



In the Show: dropdown we recommend that you have the setting of Participant.

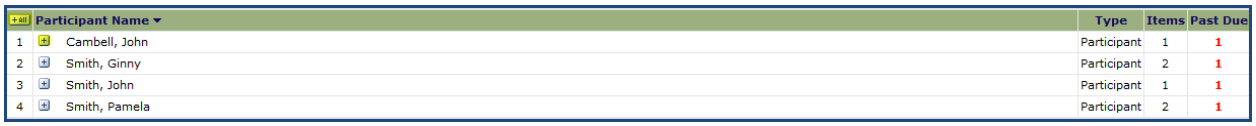


In the Scope: dropdown, you will see choices based on your User Account's Access Level. We recommend that you select the highest level you have been given.

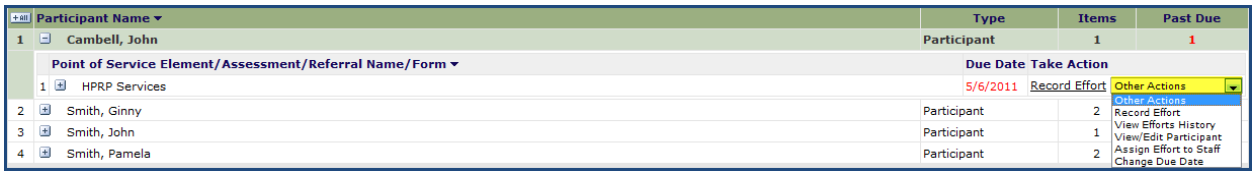


Step 3 – You will see a high level view of your To Do List: Participant's Name, Type of To Do List you are viewing, how many items that participant has in your calendar and the number of any Past Due items.

To view the details of a participant, click the + next to the participant's name. If you would like to view the details for all of your participants, click the +All button.



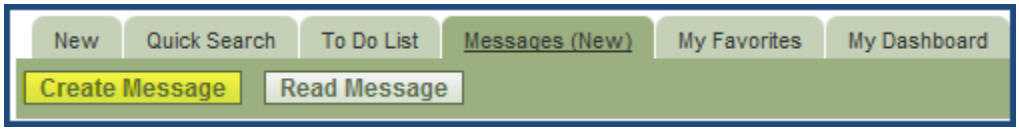
Step 4 – Within the details of the participant you will see the Activity which is due: Assessment, Referral or Point of Service and the Due Date (which will be in red if it is overdue). You will also see that there are two choices under Take Action. The first directly corresponds to the activity that is due. The second is Other Actions and this list is also generating choices that correspond to your User Access Level.



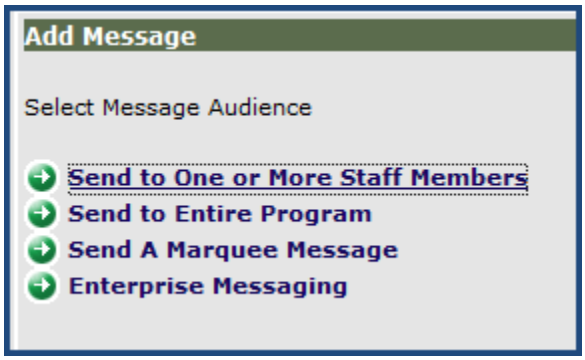
Messages

This feature facilitates secure communication between you and other ETO Software users. It provides quick links to the following:

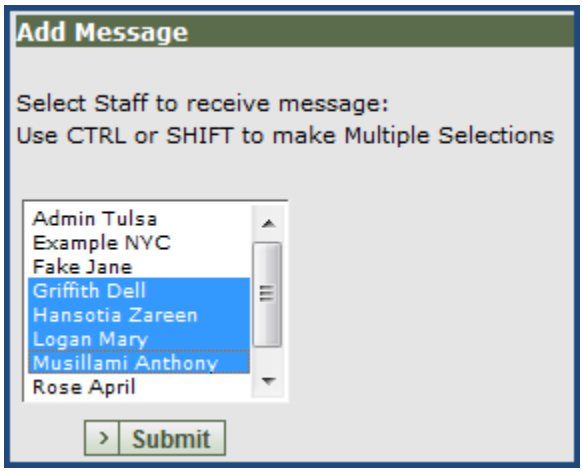
Step 1 - Create Message- You can send messages in ETO to one or more staff members or to an entire program by clicking the Create Message button.



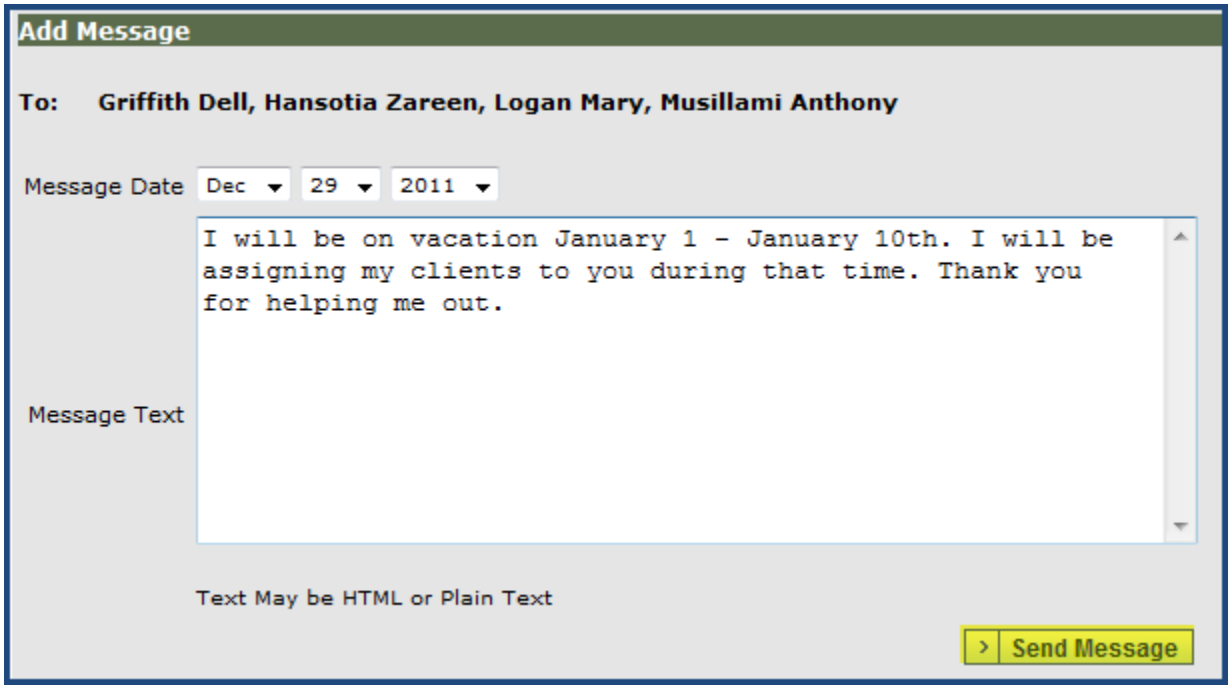
Step 2 – Select if you would like to send the message to One or More Staff Members or an Entire Program. Site Administrators can send a Marquee Message that will scroll across the screen for all users on their Site. Enterprise Managers can send a message to all users on their Enterprise.



Step 3 – In this example, Send to One or More Staff Members was selected. You may highlight one user or multiple users by holding down your Ctrl Key. Once highlighted, click Submit.



Step 4 – Type your message and click the Send Message button.



Step 5 - If you receive a message, your Messages Tab will be Red. Once you click the Tab, you will see your messages. If you don't see the messages, click the Read Message button.

Step 6 – From this screen you can read your messages. Once they are read, you can delete or print the messages. If you would like to delete, you may click the individual checkboxes next to the messages or click the Select All From checkbox.

My Favorites

This allows you to create shortcuts to the features or reports of ETO Software used most frequently. It is recommended that My Favorites be set up to store links that are not on the Home Page. For example, many users access features that are shared

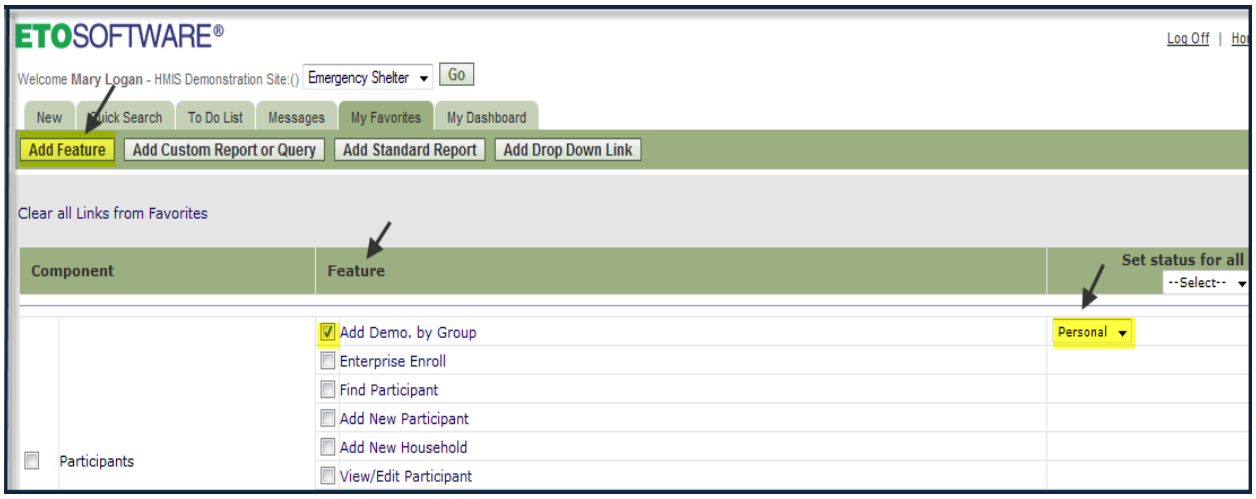
across all staff through the home page, but will use My Favorites for links that are exclusive to their data entry. My Favorites is also a great place to add links to reports.

Administrators have the ability to specify whether a link is for their "personal" use or should be available to all users by "default." Those users with the role Department Head or lower can only set personal favorites.

Depending on your access level, you can create different kinds of Favorites. Below we will explain how to add a Feature. You may follow the same process to Add a Custom Report or Query, Add Standard Report or Add Dropdown Link.

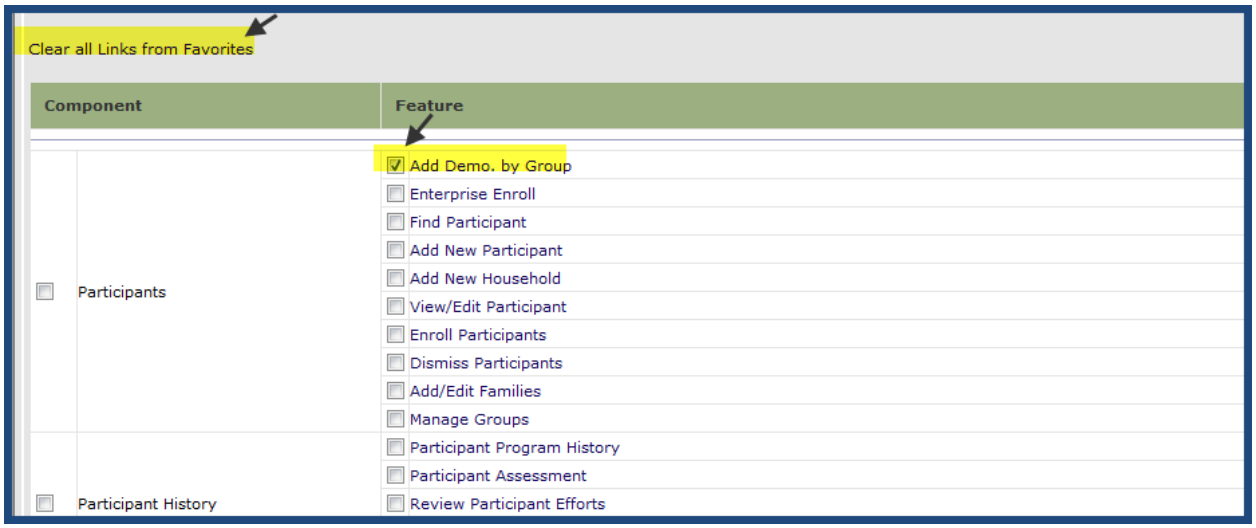
Add Features

Step 1 - Click the **Add** Feature button. Check the box to the left of the feature that you wish to place on your Favorites Tab. Status is based on the User Role. If you are a staff account user, you will only be able to set your favorites for Personal. If you are an Administrator, you can set the Status to Default. If you do this, all of your staff in this program will see this feature in their My Favorites. When you have selected your features click Submit at the bottom of the screen.

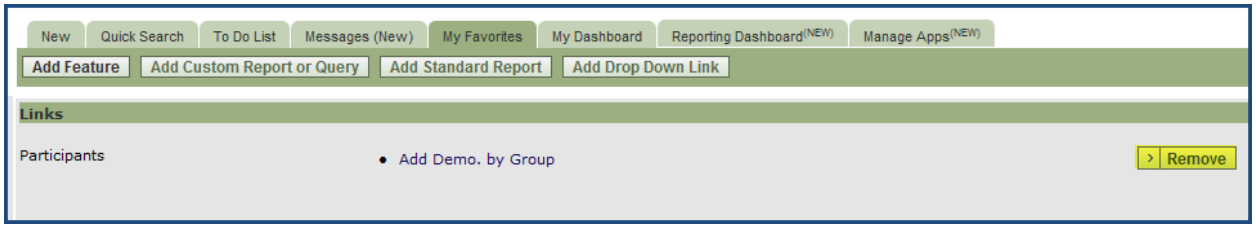


Step 2 - Features and reports can be cleared from my Favorites in two ways:

In each area (Add Feature, Add Cx Report, Add Standard Report) or Clear **All Links from Favorites** (all users) or **Clear All Links from Program Favorites** (only Site Administrators). This will clear all features in one interaction.

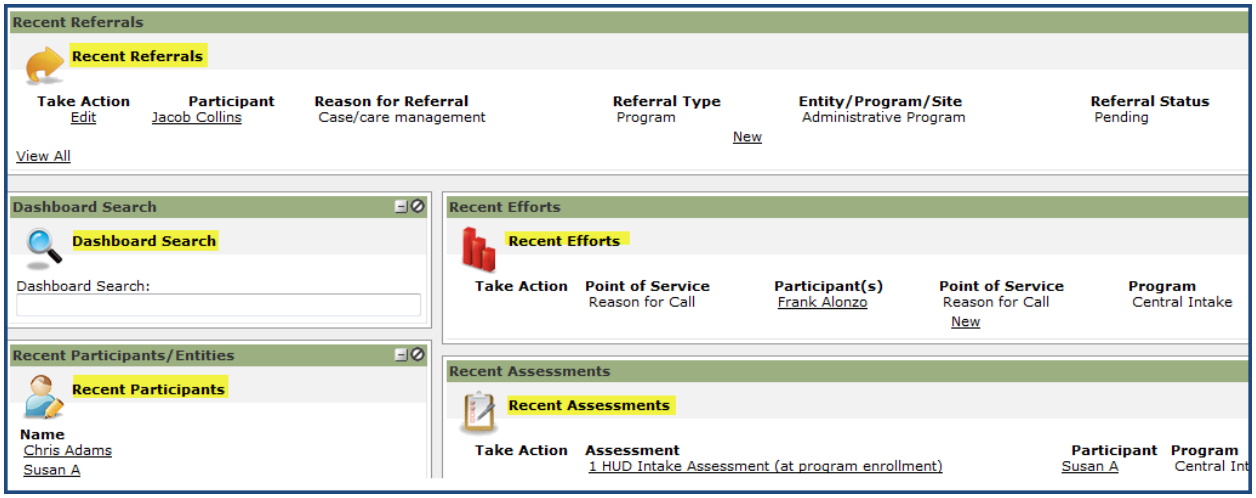


For personal favorites, on the My Favorites page, click Remove to the right of the feature or report and click, Remove.



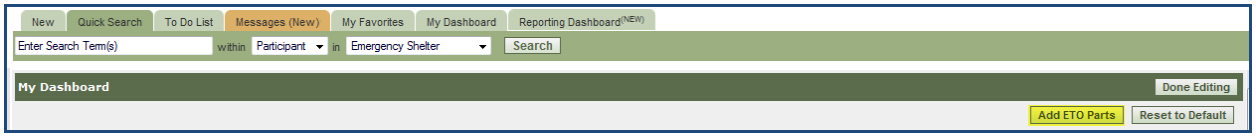
My Dashboard

Every ETO User Account has a tab for My Dashboard. This tab is a great place to keep track of the most recent work and most recent participants you have worked with. You may add, edit or remove sections of your own dashboard.

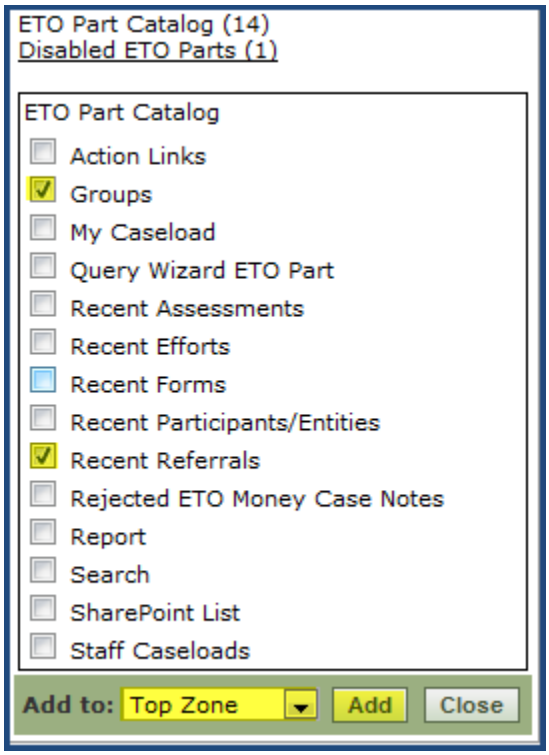


Step 1 - Select the **Edit Dashboard** button to rearrange the ETO Parts by dragging and dropping between and within the 5 available zones: top, left, middle, right, and bottom.

Step 2 – If you would like to Add a new section to your Dashboard, click **Add ETO Parts**.



Step 3 – Within the ETO Parts Catalog, select the checkbox of those parts you would like to appear on your Dashboard. At the bottom of the catalog, Select the Zone you would like the parts to appear and click Add.



Below is a description of the Catalog Parts:

Action Links serve as quick links to common functions used in the software. These include recording participant efforts, participant assessments, reviewing your efforts, and adding new participants/households. Taking an action from these links will redirect the user back to My Dashboard after the action is completed. My Dashboard is equipped to become your new launch point for most of the work you complete in the software.

Groups- This part displays all of the active groups in the currently selected program, along with their Group Start Date, Group End Date (if disabled groups have been selected to show on the Dashboard), and the Date Last Modified, Groups can be edited or disabled from this part. Clicking on the Group Name redirects the user to that group's dashboard.

My Caseload- The caseworkers part is only applicable if the user has the option enabled to add and remove participants to other caseloads. This part lists all participants in the program who are on a caseload, with links to remove or edit (change or add) the caseworker assigned. The **My Caseload** part displays a list of the user's caseload. Each participant's name will link back to the Participant's Dashboard. Users with access to manage their own caseloads will have the ability to add and remove participants from their caseloads. Users without that access will not have the Add button

or Remove links. Caseload Access is enabled by the ETO Administrator on the *Manage Staff Accounts* page

Query Wizard- This part displays Query Wizard results from Saved queries (built by Administrators) inside the dashboard. The results will display similarly to the results queries that have been turned into Custom Report page, with the same exporting features and some of the familiar DBNetGrid tools.

Recent Assessments- The 5 most recent participant assessments the user has completed will be displayed. Links to edit and add similar assessments will appear if the selected program contains the participant and assessment listed. After submitting edits and adding a new occurrence of the assessment, the user will be returned to My Dashboard. This makes navigating from My Dashboard a user friendly experience.

Recent Efforts- The 5 most recent efforts the user has recorded will be displayed. Links to edit and add similar assessments will appear if the selected program contains the participant and point of service listed. After submitting edits and adding a new occurrence of the effort, the user will be returned to **My Dashboard.** This part can be filtered to display just one point of service. If this option is selected, the 5 most recent efforts for this one point of service will display in the part. Multiple Recent Efforts parts can be included on one dashboard, each filtered to a different point of service.

Recent Participants/Entities- This part can now be edited to include only Participants or only Entities. If you prefer to see both, add the Part to the Dashboard twice and edit each accordingly so that one shows Entities and the other shows Participants. In the ETO Parts Catalog this part is now listed as Recent Participants/Entities. Selecting the name of the Participant or Entity will take the user to that *Participant's Dashboard* of that *Entity's Dashboard.*

Recent Referrals- The 5 most recent referrals the user has recorded will be displayed.

Rejected ETO Money Case Notes – This part only applies to ETO Money functionality and will not be used for HMIS.

Report - Reports created with WEB Intelligence (both Custom and Standardized reports) that appear in the **My Reports** section on the **View Reports** page are available. This includes custom reports built with ETO Results and Query Wizard Plus. Select the Refresh Data Icon in the upper right hand corner of the report and prompting query filters will pop up.

WEBI Reports that contain Participant specific data can be added to the Participant's Dashboard. To make a report viewable on the Participant Dashboard, a Query Filter must be added for the Participant Site Identifier field. Set the filter to prompt, and write over the text in the prompting box to PID. The Participant Notes or Participant Efforts

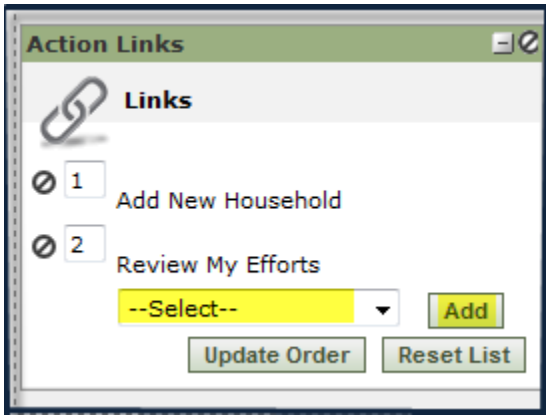
and Notes (with Effort Qualifiers) standardized report works particularly well using this method. The report can be saved with whatever name you choose, and then edited to include a prompting filter for PID.

Search or Dashboard Search- Search the site using first name, last name or some part of either. Select a participant's name from the search results to be redirected to that participant's dashboard.

SharePoint Lists- This ETO part allows the user to pull lists their organization's SharePoint service into My Dashboard. Once this part is added, the user will be asked to edit the part. On the edit screen, the user will enter the SharePoint Login (jdoe). SharePoint password and SharePoint URL. Once logged in, the ETO Part will include a drop box of SharePoint lists. Click on the link to access it. If the user is logged into SharePoint, the page associated with the link will pop up immediately. If not, the user will be prompted to enter SharePoint Credentials.

Staff Caseloads- On the *Manage My Site* page, there is an option to Make My Dashboard the landing page. Site Administrators and Select this option to default your Dashboard (My Dashboard) to all users logging in. The Home Page can then be accessed through the link in the upper right corner of the software.

Step 4 - The Action Links serve as quick links to common functions used in the software. These include recording participant efforts, participant assessments, reviewing your efforts, and adding new participants/households. Taking an action from these links will redirect the user back to My Dashboard after the action is completed. My Dashboard is equipped to become your new launch point for most of the work you complete in the software. To Add a Link, click the dropdown arrow and select the link. You can change the order they appear by changing the order number in the left side box. When finished, click Update.



Working with a Client

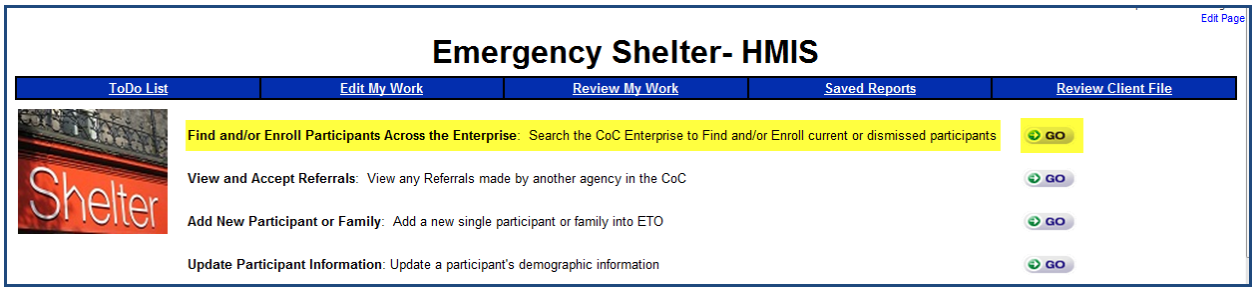
Homepage vs. Dashboards

There are many ways to navigate ETO Software while working with clients. The two ways discussed here will be: Homepages and Dashboards. As you use the software you will find which navigation appeals to you while you are working with your clients.

Homepages

All Programs have a specific Homepage with Navigation links to different areas of HMIS functionality.

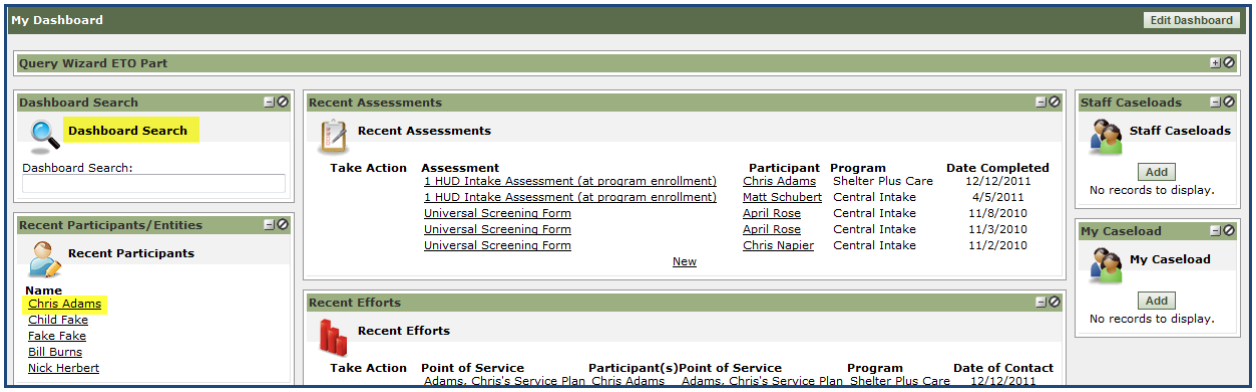
For example, the very first link is, **Find and/or Enroll Participants Across the Enterprise**: Search the CoC Enterprise to Find and/or Enroll current or dismissed participants. Once the Go Button is selected to the right of that description the screen will navigate to that functionality.



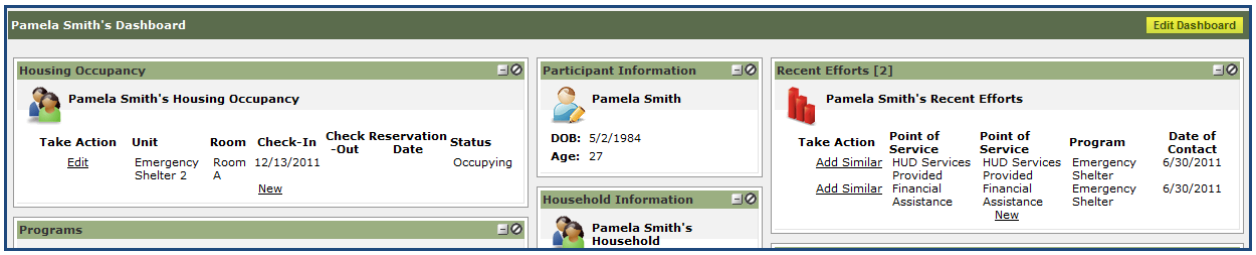
Dashboards

There are two Dashboards that you can work with in ETO. **My Dashboard** is a dashboard that is tied to your user account. **Participant Dashboard** is a dashboard that is tied to a client.

From My Dashboard, you can see the last 5 clients you worked with. If you click their name, the screen will navigate to that client's dashboard. If the client's name is not on your Dashboard you can search their name in the Dashboard Search to navigate to their Dashboard.

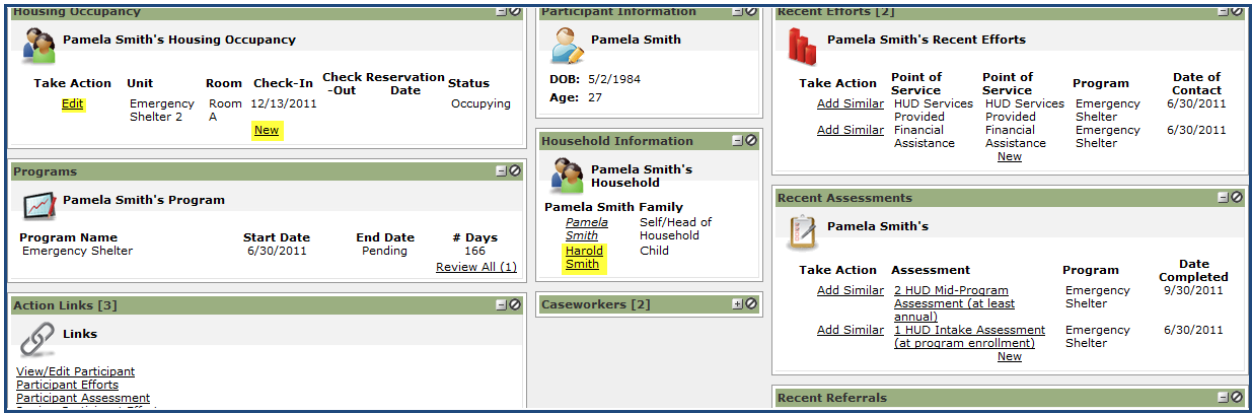


Below is the Dashboard for Pamela Smith. Please remember you can customize Dashboards by clicking the Edit Dashboard button.



Within Pamela's Dashboard you can view: Participant Information, Program History, and Household Information. You can View, Add or Edit Client information for Housing Occupancy, Efforts, Assessments and Referrals. There are also additional links that may also be customized.

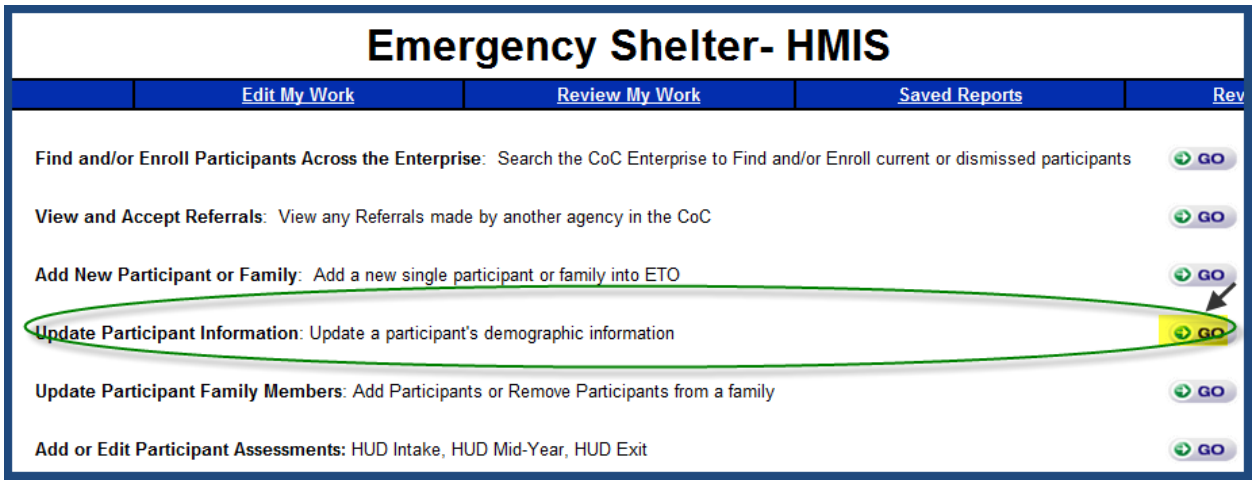
In the example you can see that Pamela has a son, Harold. If you work with Pamela first but then need to add information for Harold, you can click Harold's name in the Household Information and it will take you to Harold's Dashboard.



Updating Client Demographics

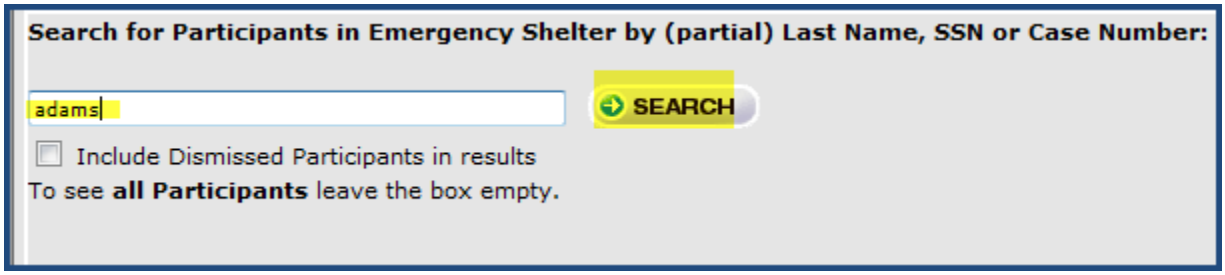
From the Homepage

Step 1 - Select the **Go** button that corresponds with the **Update Participant Information**.

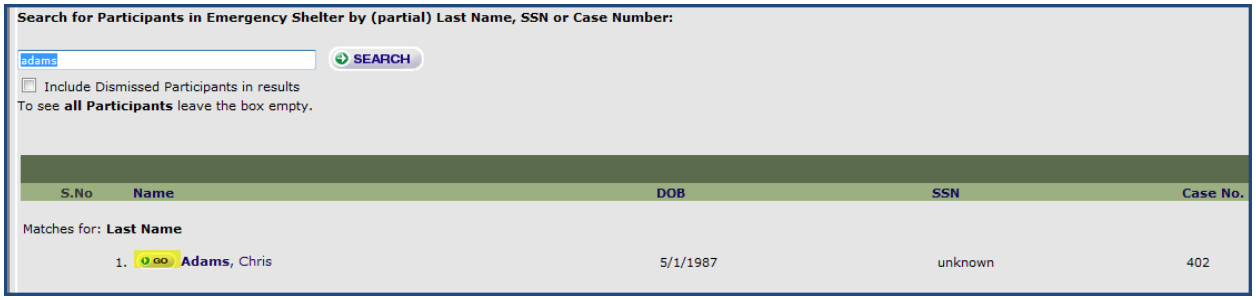


Step 2 - Type the participant's last name then **Search**

***only check the box to include dismissed participants if you are working with dismissed participants from the program.**

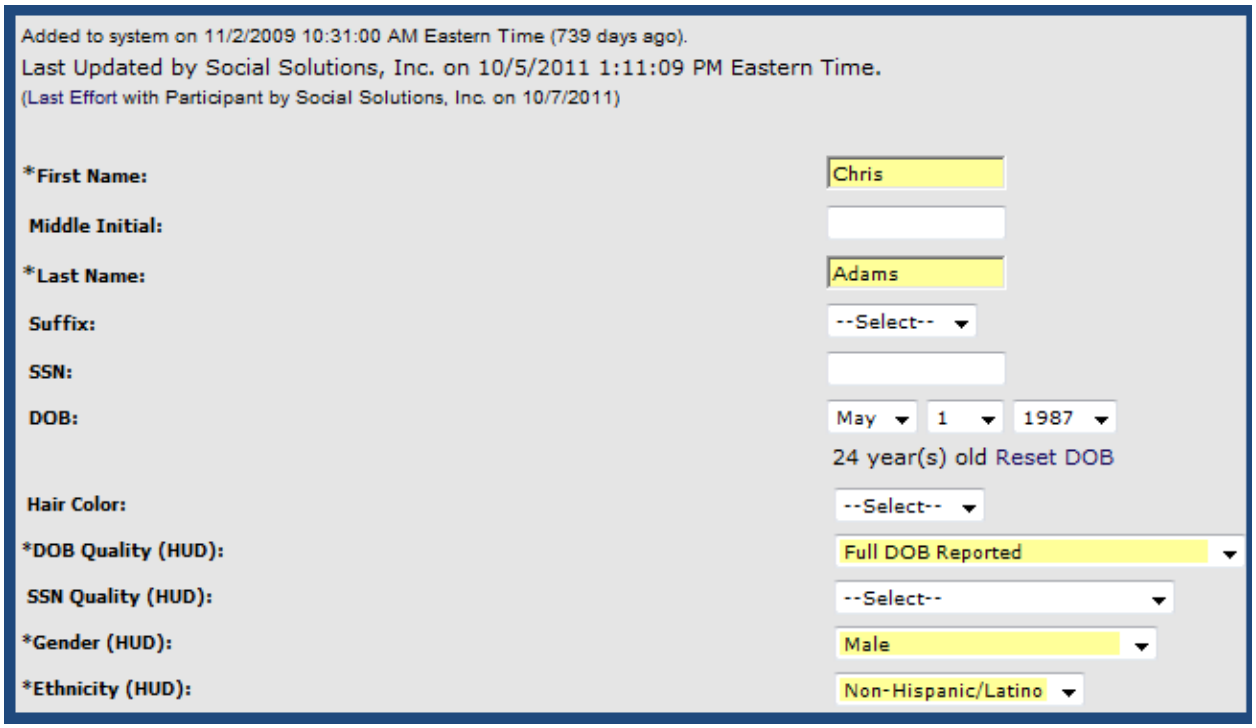


Step 3 - Results from your search will appear in the middle of the page. Select the **Go** option next to the participant's name you are updating.

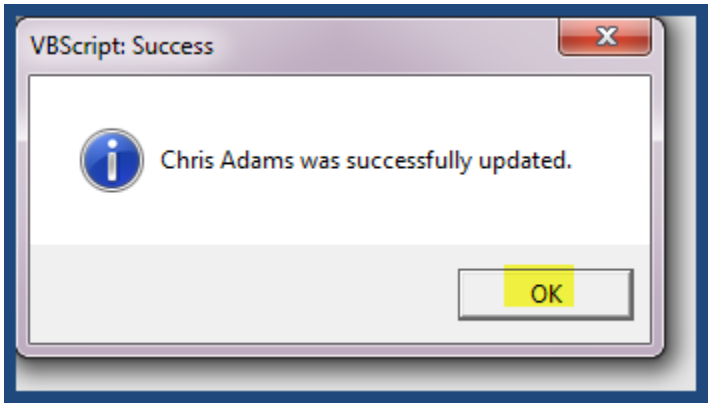


Step 4 - Update the demographic fields then select **Submit** at the bottom of the screen.

***Keep in mind yellow fields are required to be completed in order to submit.**



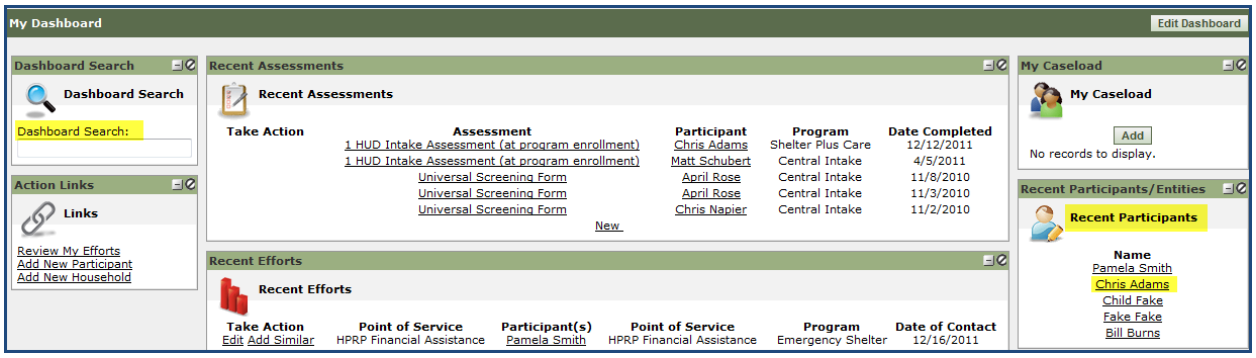
Step 5 - A confirmation screen will appear. Select **OK** to confirm your update(s) in the database.



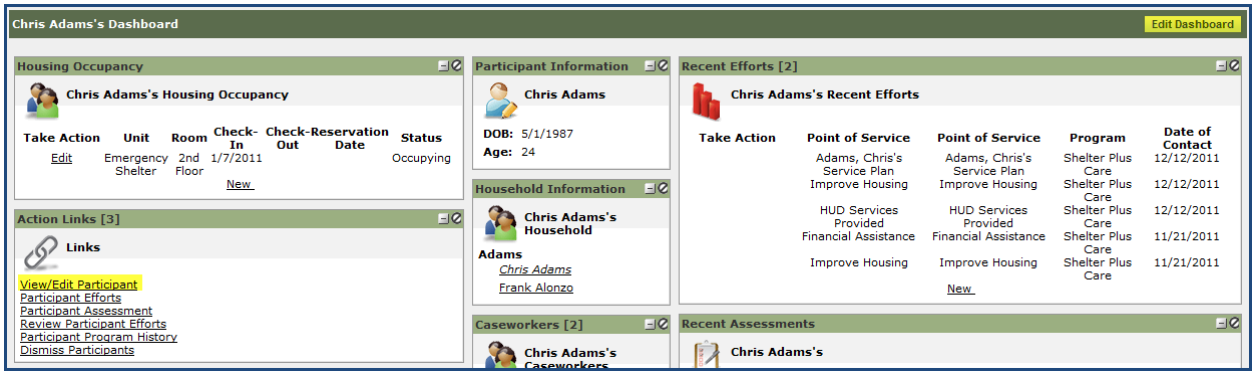
Updating Demographics from the Participant's Dashboard

If you prefer you may update the demographics from the Participant's Dashboard.

Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – Once you are on your Participant's Dashboard, you will see a section labeled, **Action Links**. In that list you should see **View/Edit Participant**. If you do not see that link, you can **Edit your Dashboard** to add the link.

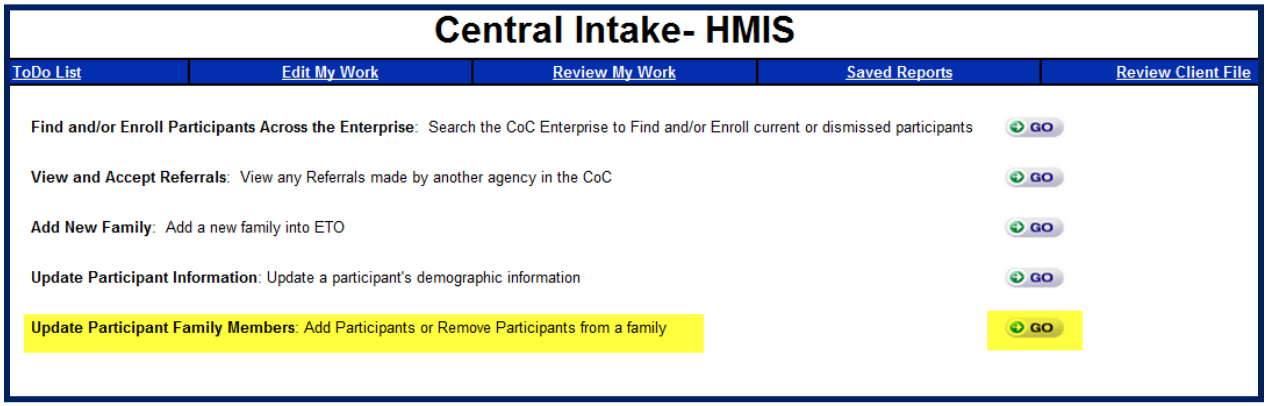


Step 3 – Follow **Steps 4 and 5** from **Update Demographics from the Homepage.**

Add/Edit Families

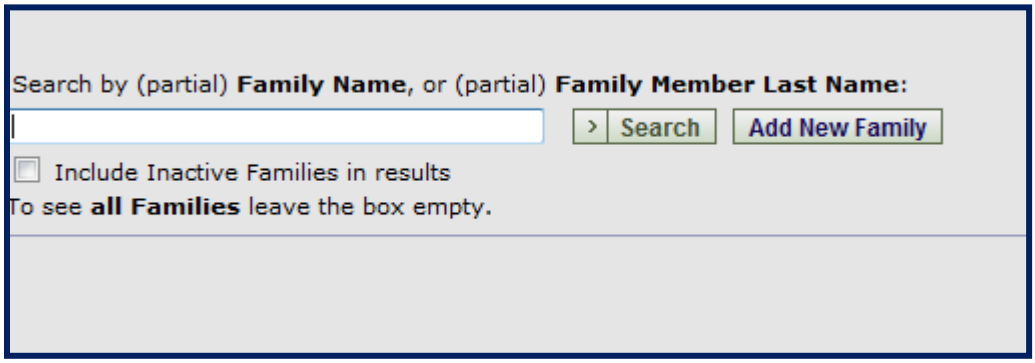
ETO Software™ allows for Participants from any Program in your Site to be linked. This link allows an organization to count how many individual participants, versus how many families are served by an organization. Typically, Add/Edit Families is used in conjunction with the Add New Household feature. That's because the most efficient way to create Families is to use Add New Household, but that feature does not have an edit option. Edits must be done with Add/Edit Families. The terms Household and Family are synonymous within ETO.

Step 1 – Click the **GO** button for **Update Participant Family Members**.

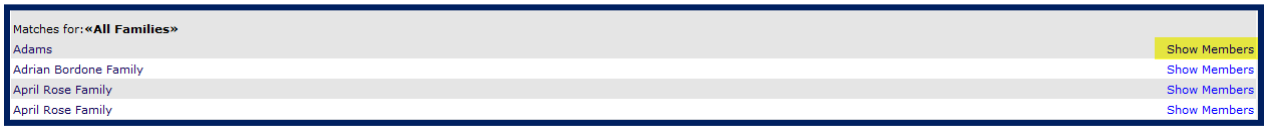


To Edit an Existing Family:

Step 2 - Search for the family by full or partial Family Name or last name of any of the Participant(s) in the family.



Step 3 - Click on **Show Members** to see the members of the family if you are unsure which family to choose. This is especially helpful if more than one family has the same name.



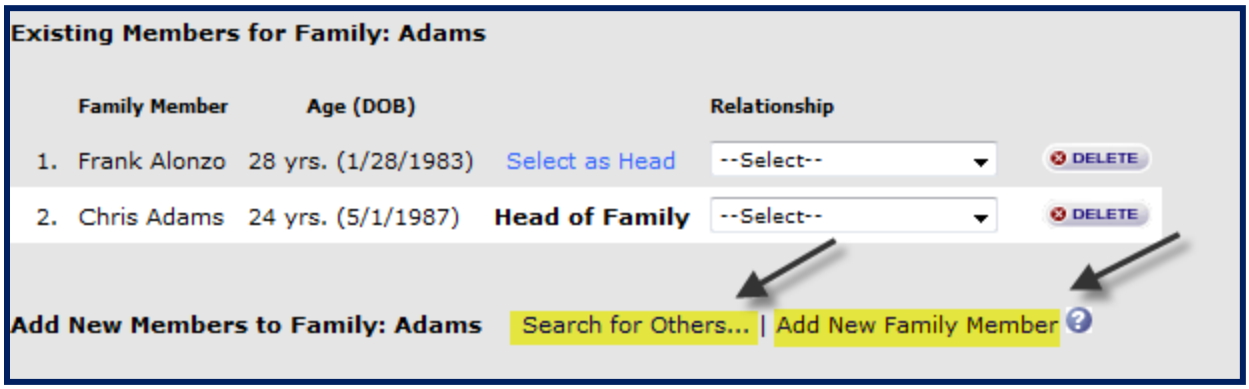
Step 4 - Click on the name of the family you want to work with and you will be directed to a Family Add/Edit Screen.

- **Work With Family** - Click here to add participants to the family, revise Head of Household/Family Relationships, or to Remove a family member.
- **Edit** - Click here to edit the family name.
- **Delete** - Click here to delete the history of the participants ever being linked as a Family (or families that contain zero participants). This does not delete each individual participant from ETO.
- **Disable** - Click here to deactivate the family relationship.

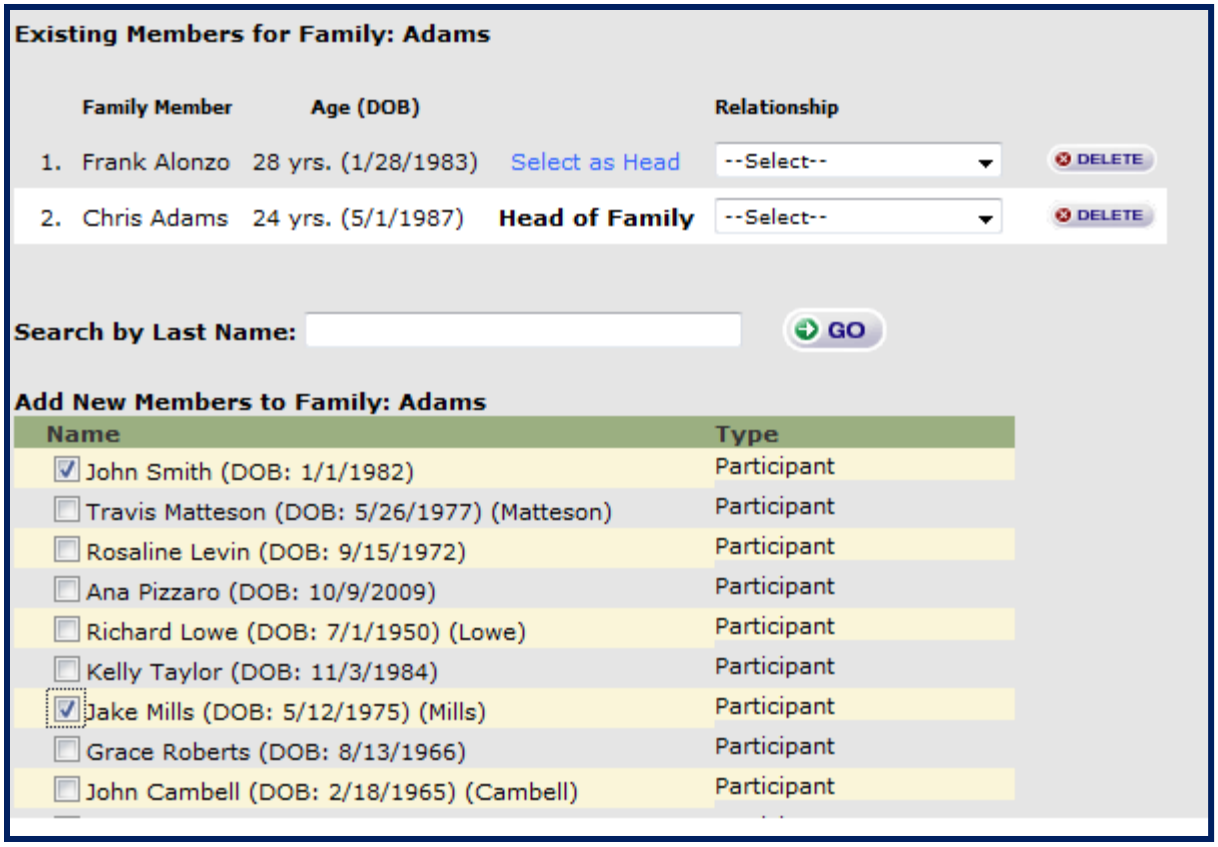
Work With Family: Add Members

There are two categories of members that can be added to existing families:

Step 1 - New members are participants that exist in ETO. They may or may not be in the selected program, or be currently active. To determine if the participant you want to add to the family is in the site, click **Search for Others**.

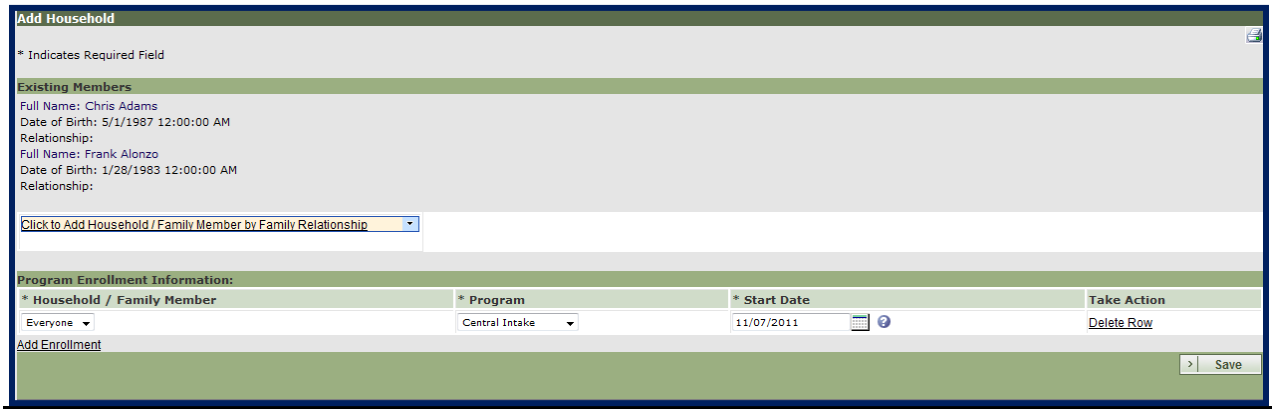


Step 2 – Type in the Last Name of the Participant you wish to add to the family and click **GO**. Check the box to the left of the participants (note that current family membership will show next to the participant's name) being added and click the add button at the bottom of the page. The next page will allow for a family relationship to be set for the new member(s).

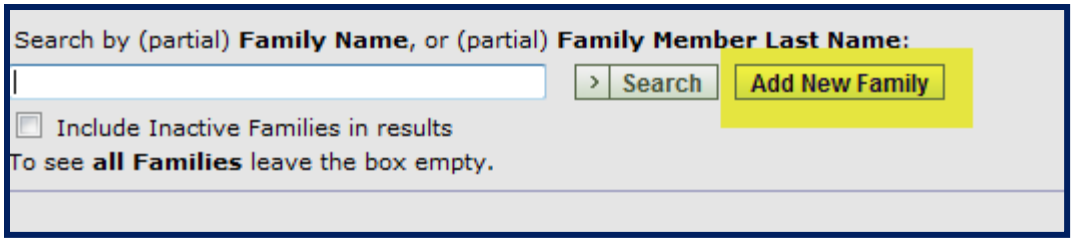


Add New

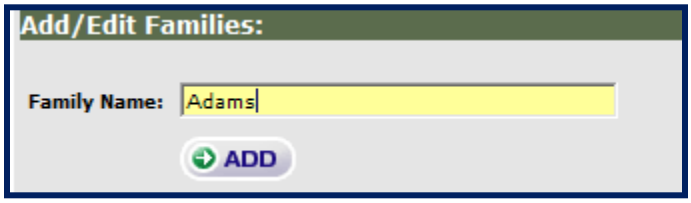
New members do not exist in ETO. To add (and enroll) participants into ETO and add them to the family simultaneously, click **Add New Family Member**. This link directs to the Add New Household page. Select the relationship of the new member and a demographic screen will appear. Complete the demographic fields (unfortunately this screen does not have the option to copy values from the head of household on fields such as address), if more than one participant is being added, choose the relationship of the additional new family members. Once the demographics are entered, select the program enrollment and click **Save** at the bottom of the page.



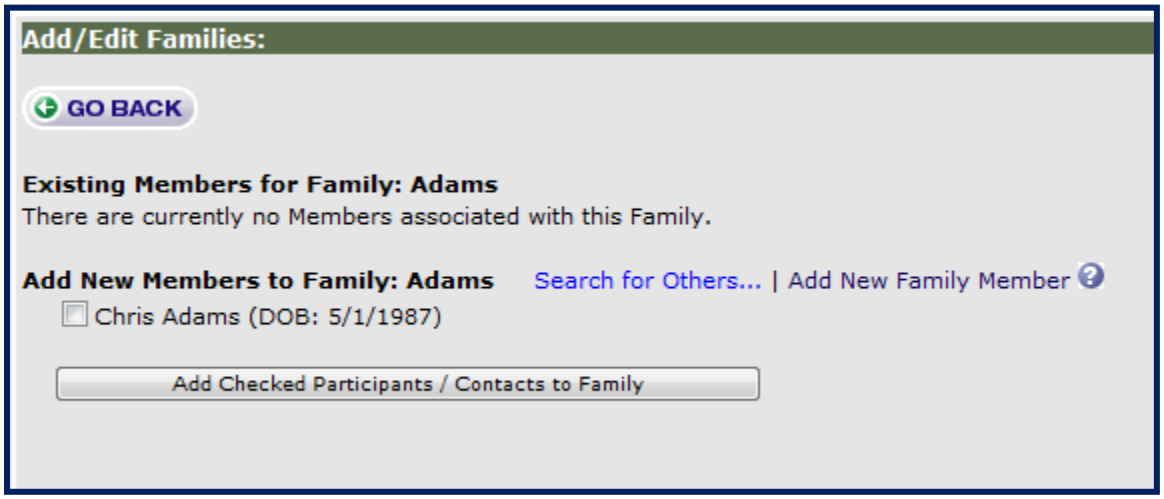
Add New Family



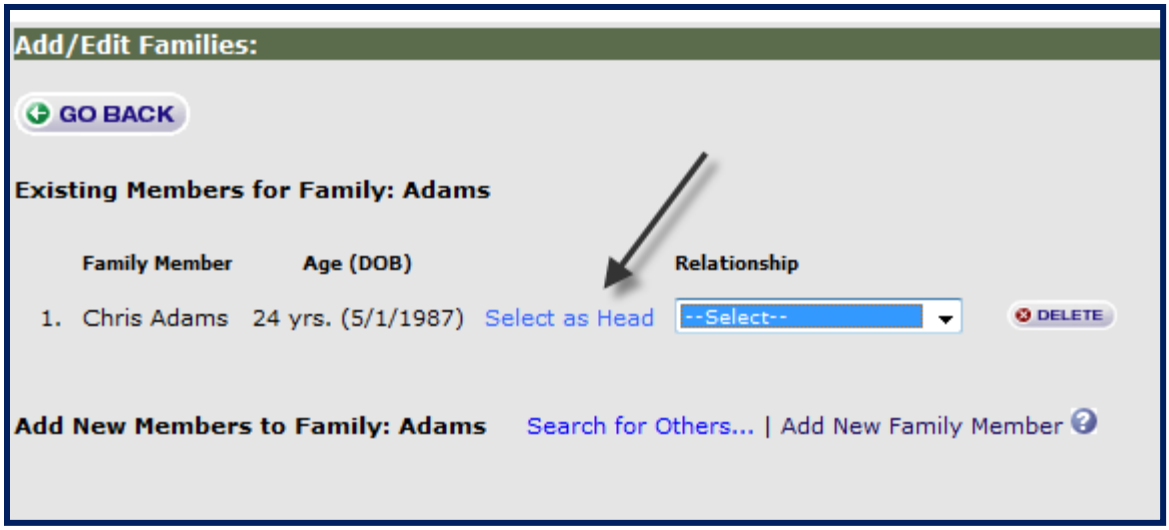
Step 1 - Type a Family Name



Step 2 - You will note that all Participants with the last name you chose for your Family will appear. If Participants in the Family do not have the same last name, use **Search for Others** to find existing Participants to add to the Family. Check the boxes to the left of the family members and click the "Add Checked Participants to Family" button at the bottom of the page.

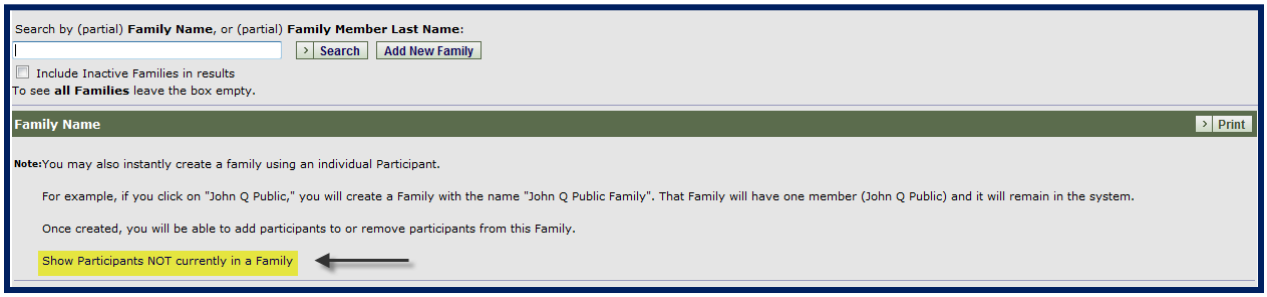


Step 3 - Further define your family by using the **Select As Head** functionality in blue to choose one of the Participants as Head of Household. Choose the family role from the **Relationship** drop-down box that best fits each Participant.



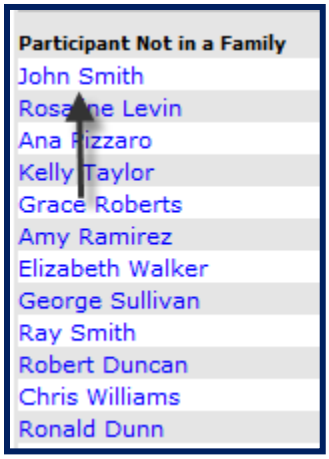
Participants NOT currently in a Family:

Step 1 - Click the **Search** button on the Add/Edit Families screen (search criteria may be entered, or the search box can be left blank). Click the blue font: **Show Participants NOT currently in a Family**. The results include participants from across the site, regardless of program enrollment, UNLESS, the participant is enrolled in a Confidential Program that the user does not have access to.



Participant Not in a Family	SSN	Case Number	DOB
John Smith	XXX-XX-6789	379	1/1/1982
Rosaline Levin	XXX-XX-2222	383	9/15/1972
Ana Pizzaro	XXX-XX-3332	384	10/9/2009
Kelly Taylor	XXX-XX-5555	387	11/3/1984
Grace Roberts	--	401	8/13/1966
Amy Ramirez	--	431	--
Elizabeth Walker	XXX-XX-2947	432	7/9/1973
George Sullivan	XXX-XX-1313	433	8/8/1942
Ray Smith	--	436	6/8/1968
Robert Duncan	--	439	5/15/1993
Chris Williams	--	440	5/9/1985
Ronald Dunn	--	441	1/23/1940
Karl Wong	--	442	--
Jenee Grothe	--	447	3/15/1970
Tom Zamora	XXX-XX-0987	448	8/8/1979
John Zamora	XXX-XX-3282	452	2/18/1989
Crystal Goodwin	XXX-XX-8282	453	5/5/1956
Jamie Knapp	--	455	7/30/1985
Victoria Hall	XXX-XX-5555	456	7/21/1962

Step 2 - Clicking on a participants name will automatically create a family/household of one, named for that participant. If you want to add more members to the Family, click **Work with Family.**



Other family related features

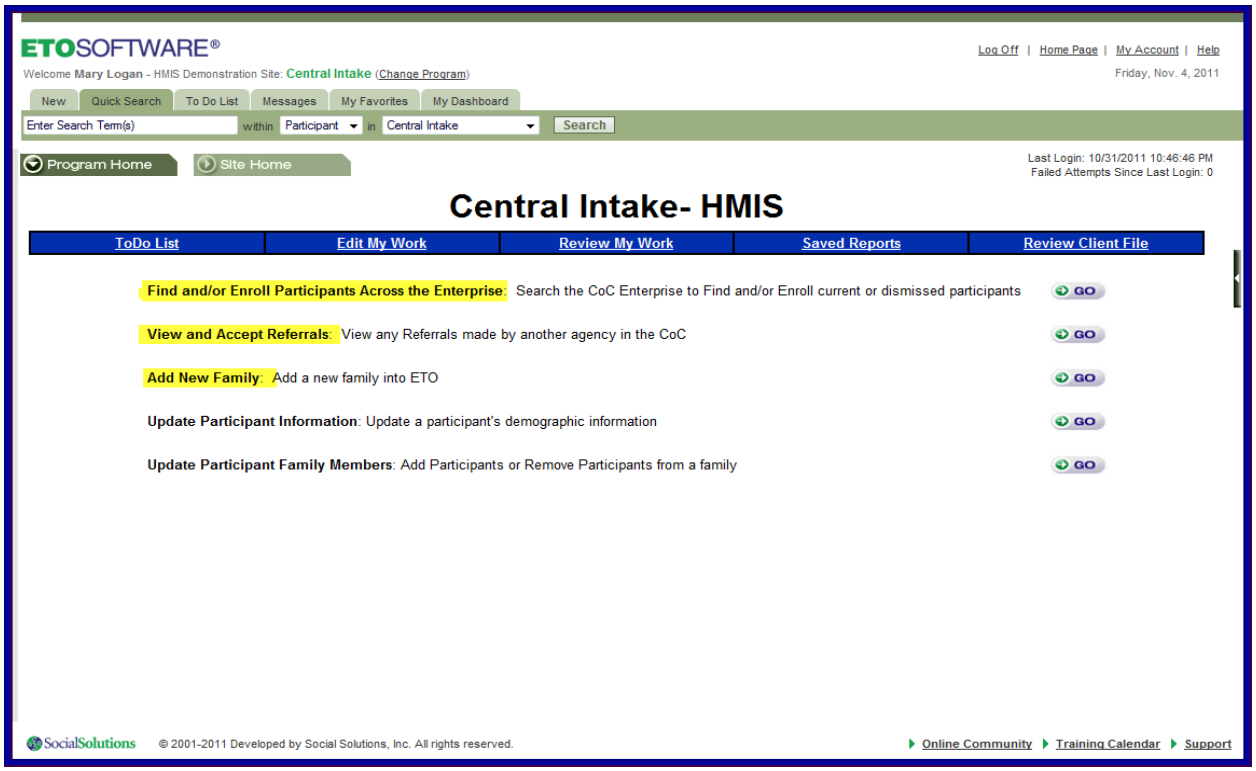
Other Family features can be found in the green icon on the upper right corner of the View/Edit Participant screen, which contains "Family Quick Links" when clicked. Quick Links allow quick access to features found on the Add/Edit Families page, links for entering data for the family, and links to features to work with individual participants in the family.

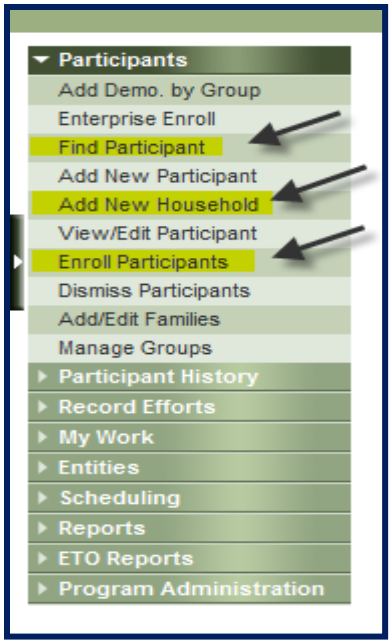
Enrolling Families

Three Ways to Enroll Clients

There are three ways to enroll clients into your program. These three enrollment options are: **Find and/or Enroll Participants Across the Enterprise, View and Accept Referrals, and Add New Family**.

You can find these links on the **Homepage** or the **Navigation Bar**.





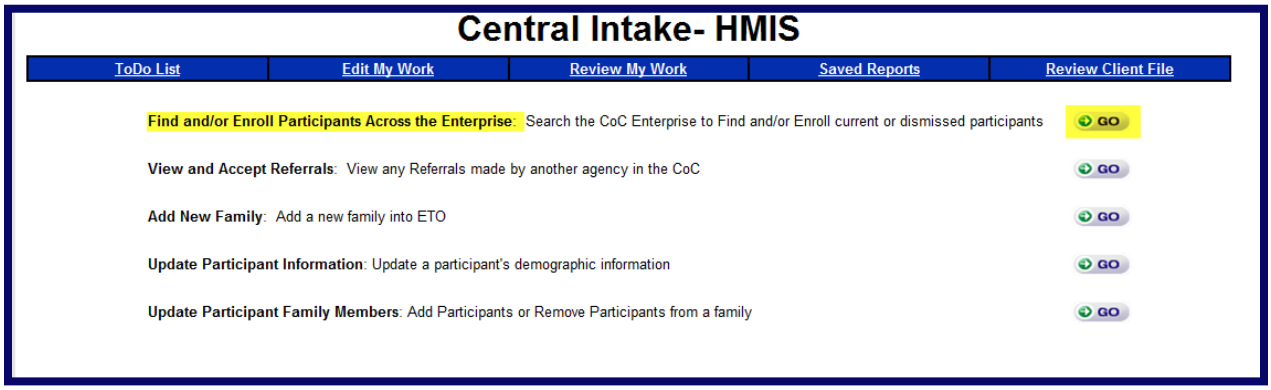
Find and/or Enroll Participants Across the Enterprise

Using this function, you can add Participants who have already been entered into the Software but are not enrolled in the selected program.

The enroll feature is typically used in one of three scenarios:

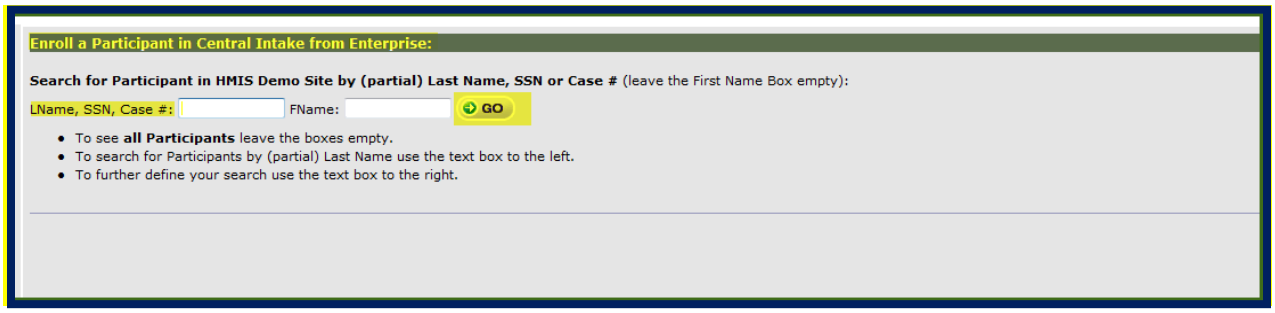
1. A previously dismissed participant is returning to the program for services
2. A participant is (or has) been enrolled in another program, and now needs to be enrolled in the selected program, too.
3. A participant was only added to ETO, but was not enrolled in a program

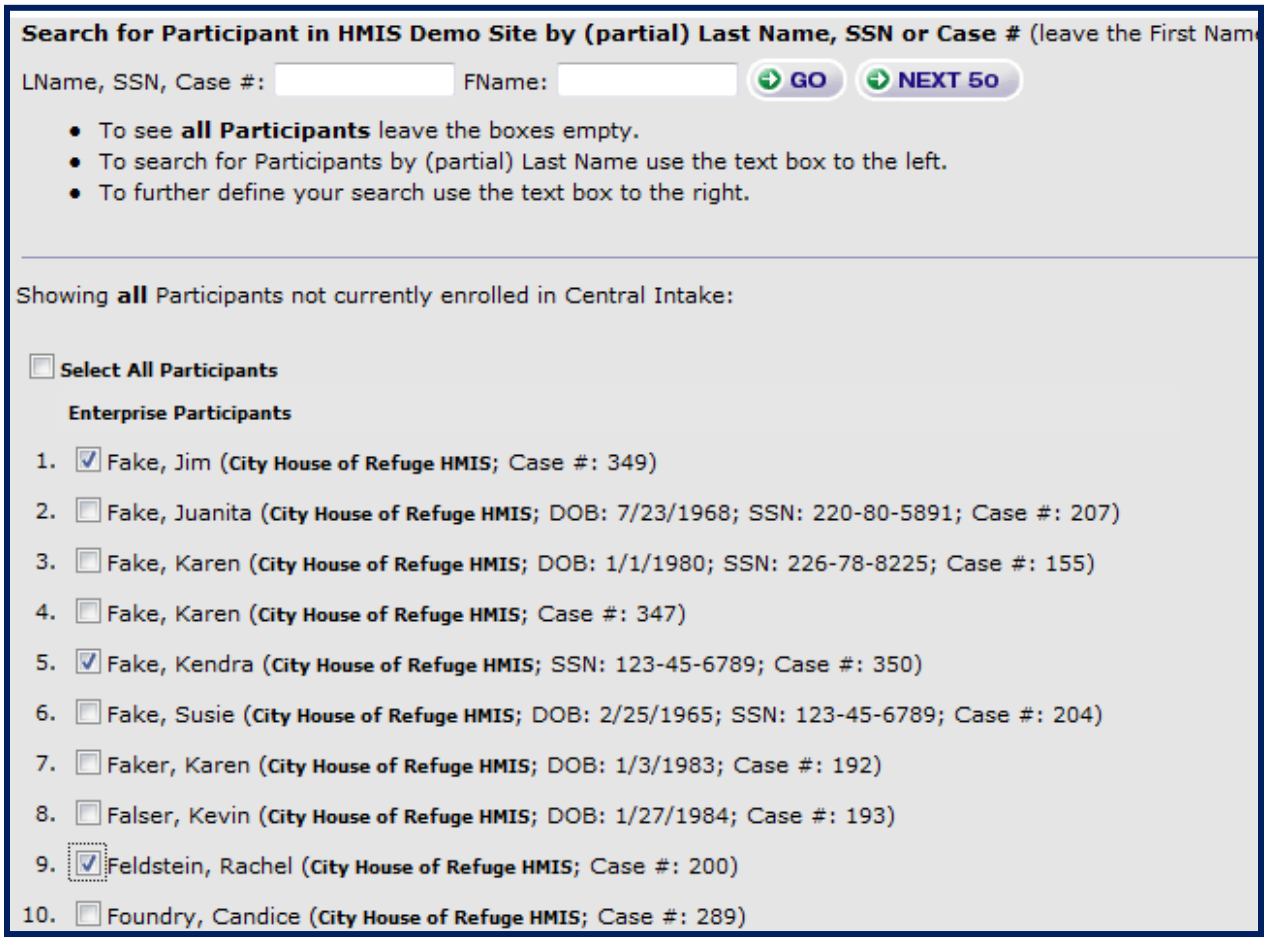
Step 1 - On the homepage, click ***GO*** next **to Find and/or enroll participant across the enterprise**.



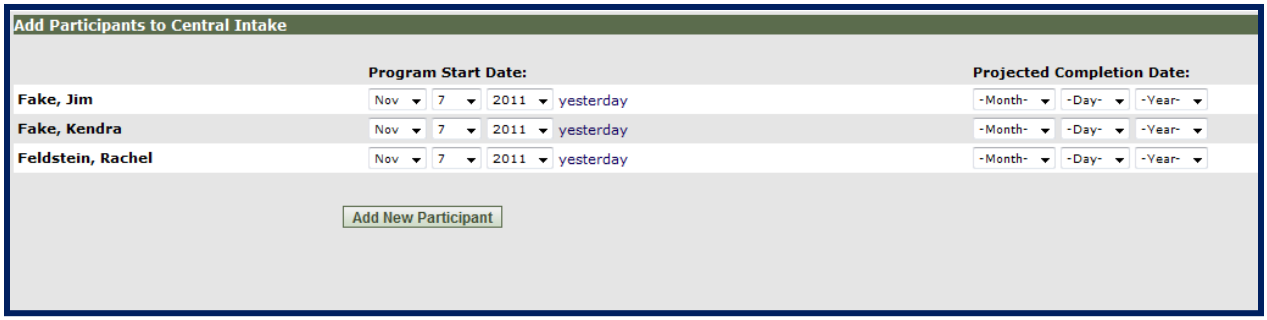
Step 2 - The search function allows you to search for Participants by Last Name, First Name, SSN, Case Number or Family Name. To see a list of all Participants available for

enrollment in the selected program, leave the search boxes empty and click **Go**. Participant Results are grouped into sets of 50. Select the desired participants (click Next 50 to advance to the next 50 results).

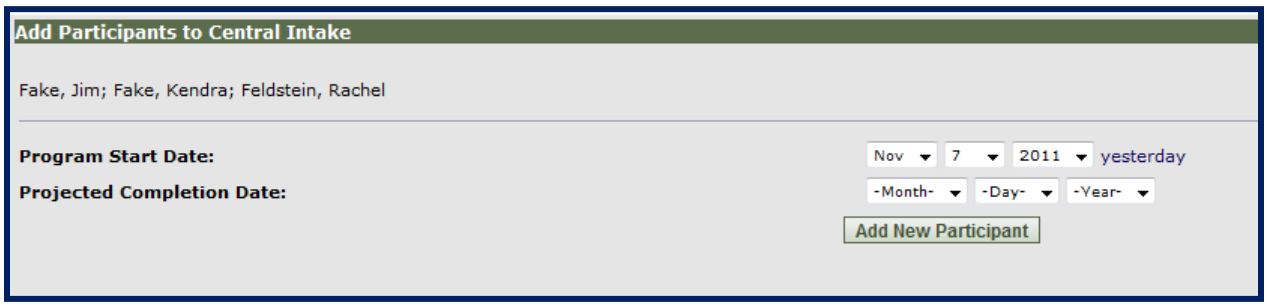




Step 3 - Click **Enroll with Different Start Dates** to enroll participants with separate start dates, **OR**



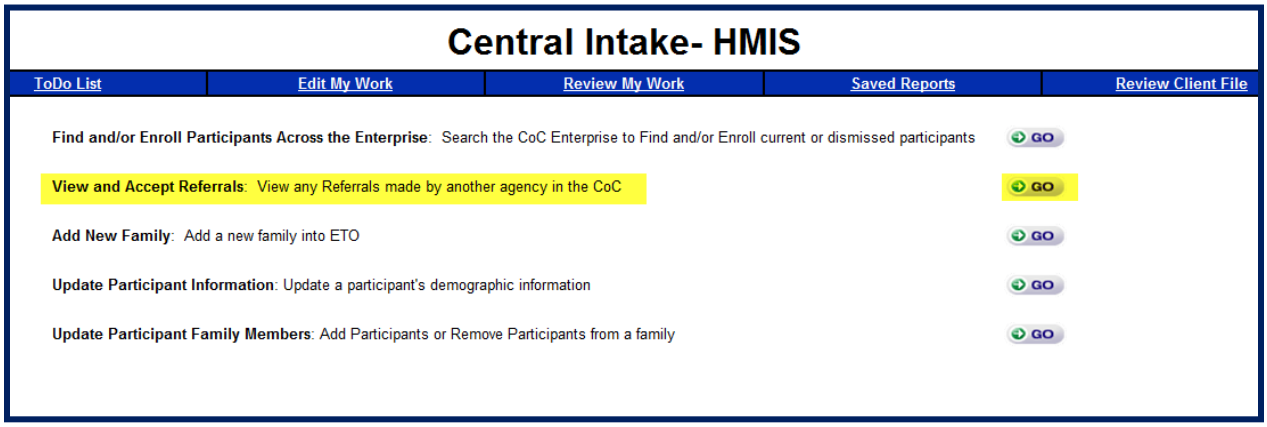
Enroll with Same Start Date to enroll all selected participants for the same start date.



You are given the option to provide a Projected Completion Date. This option is useful for Educational Programs, where all Participants complete the program on the same day. This field is only a placeholder to track when the person should leave the program and can be queried. This will **NOT** auto-dismiss any participant.

View and Accept Referrals

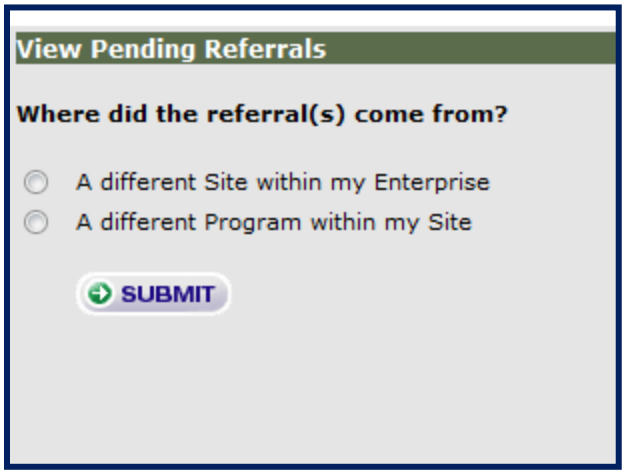
This functionality allows you to see any Participants who have been referred to your Program by another Program in your Site or the Enterprise. For example, if you have an Intake Program that manages enrollments for all Programs, when a Participant completes the enrollment process, she can be referred to your Program by the Intake Program.



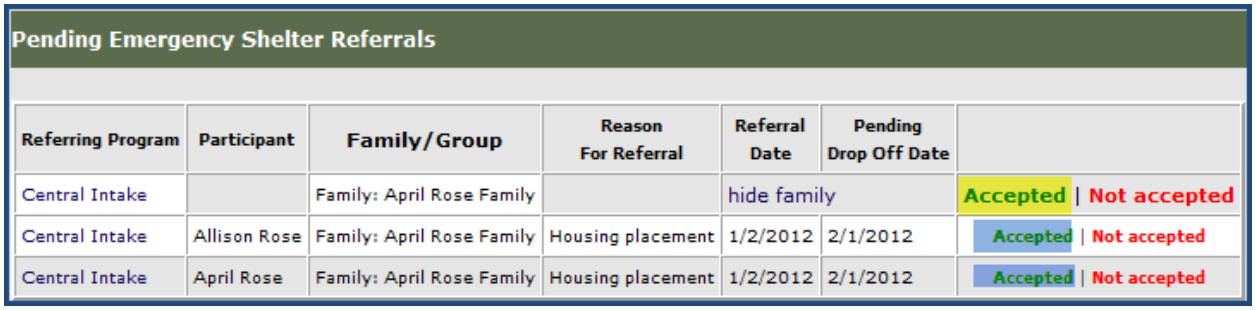
Step 1 – Click the **GO** button for **View and Accept Referrals**.

Step 2 – You will see two options. The first is to view the pending referrals from "A different Site within my Enterprise". This is ETO language which means, you want to view pending referrals from other agencies in your CoC.

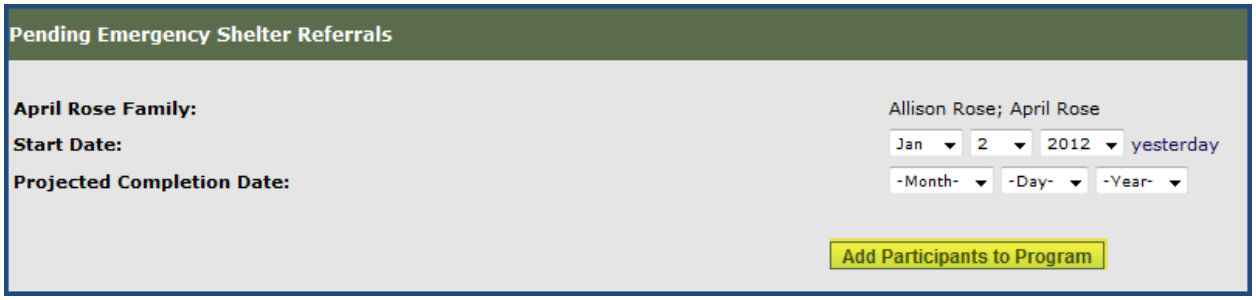
The second option is **A different Program within my Site**. Again, this is ETO language which means that you want to view pending referrals from another program within my own agency.



Step 3 - You will have the option to accept the entire family by clicking the first **Accept** for the example below of the April Rose Family. You may also choose to accept only part of the family by selecting the **Accept** for the individuals in that family. You will be asked to confirm that the person is accepted; click **Yes** to continue. If you choose not to accept a family or individual, you will be asked to provide a reason for not accepting them.



Step 4 - The next screen will allow you to select the program start date for the participant. This can be backdated if the participant arrived in your program prior to today's date.

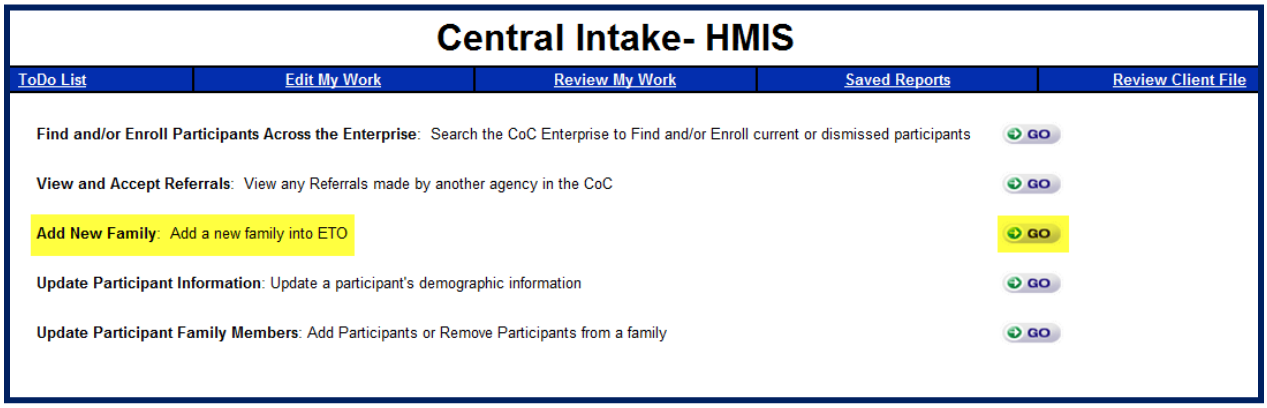


When you submit that you Accept or do Not Accept the referral, it automatically updates the View/Edit Referrals record of the Participant in the referring program so your Programs can most effectively communicate referral information.

Add New Household

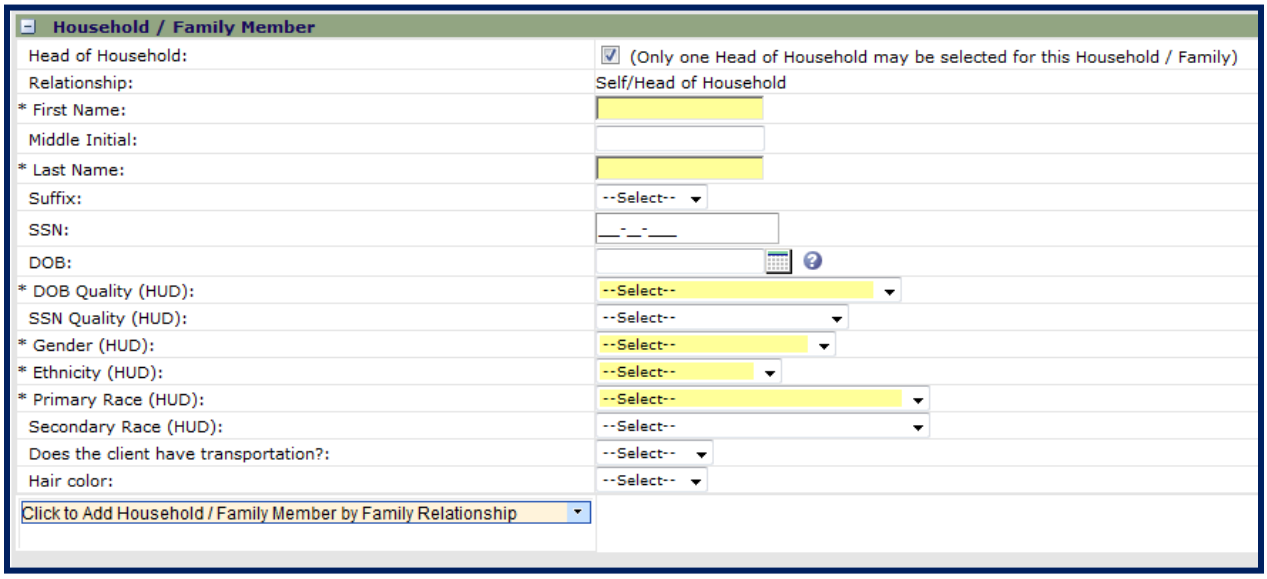
Add New Household allows users to add participants who are members of a household on the same screen. All demographic fields and program information (enrollment) associated with each participant in the household are captured on this screen. Households are *exactly* the same as "families" in ETO Software™ and all family related features (Add/Edit Families, Family Assessment, Multiple Participant Efforts (by Family), Multiple Participant Referrals (by Family), Track Participant Processes (by Family), Family focused reports (both the filtering option available on ETO:Participant and the section of reports dedicated to families on the Standard Reports page, etc) can all be used for households.

Step 1 – Click the **GO** button for **Add New Family .**



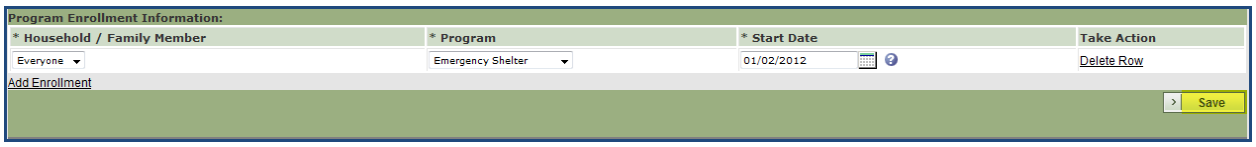
Step 2 - To add a family member to the household, Click the **Add Household/Family Member by Family Relationship**. Below is a list of relationships. If you are adding a new single person, please select the relationship of Self/Head of Household.

Step 3 - Complete the demographic profile for the participant. If applicable, check the Head of Household box at the top of the page. Note that only one participant can be Head of Household per family or household. Fields that are in Yellow or have an * next to them are Required in ETO. All HUD Universal Demographics are required except for Secondary Race (HUD).



Step 4 - If there is more than one participant in the household, select the family relationship for the next participant from the drop box at the bottom of the page. The screen will refresh and a new set of blank demographic fields will be provided.

Step 5: Enter enrollment information. Once all of the participants in the household/family have been added, determine program enrollment information on the bottom of the page. Participants may all be enrolled in the same program, or different programs. Also, each participant may have enrollments in multiple programs. Click **Save** when finished.



Step 6: The user will be alerted to any required fields that were not completed, or any other mistakes made on the page. Once the information is entered properly and saved, a confirmation message will appear.

NOTE: Once a household/family is created with the Add New Household feature, modifications can be made using the Add/Edit Families feature. If new participants are added to ETO after the family/household was created, those participants must be added individually, and linked to the existing family using the Add/Edit Families feature.

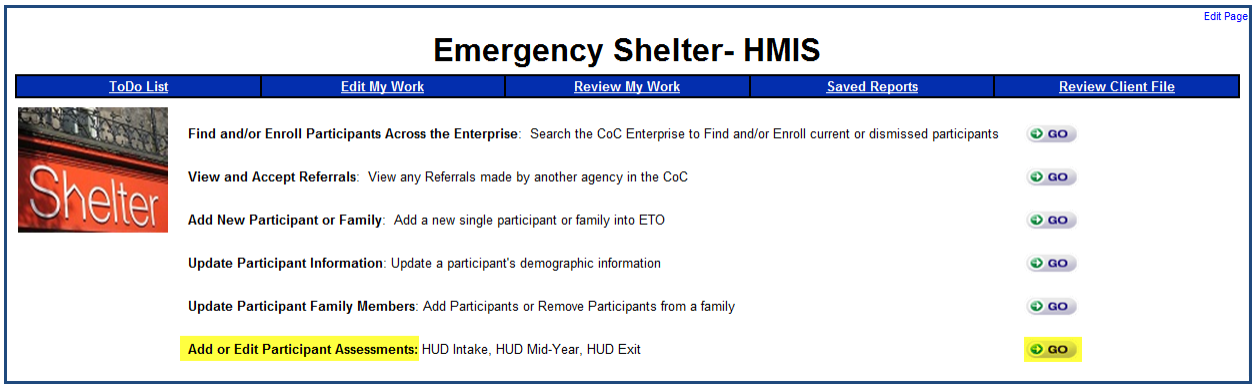
Add/Edit HUD Assessments

Add a New HUD Assessment

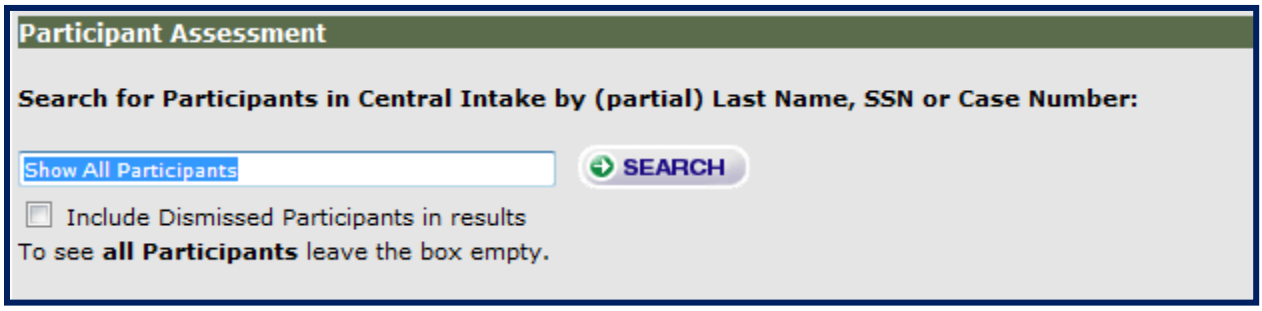
Within ETO HMIS there are three participant assessments: 1 HUD Intake Assessment, 2 HUD Mid-Program Assessment (to be taken annually) and the HUD Exit Assessment. These assessments contain the Required HUD HMIS Data Standards as well as the optional Data Standards.

Add New Assessment from the Homepage

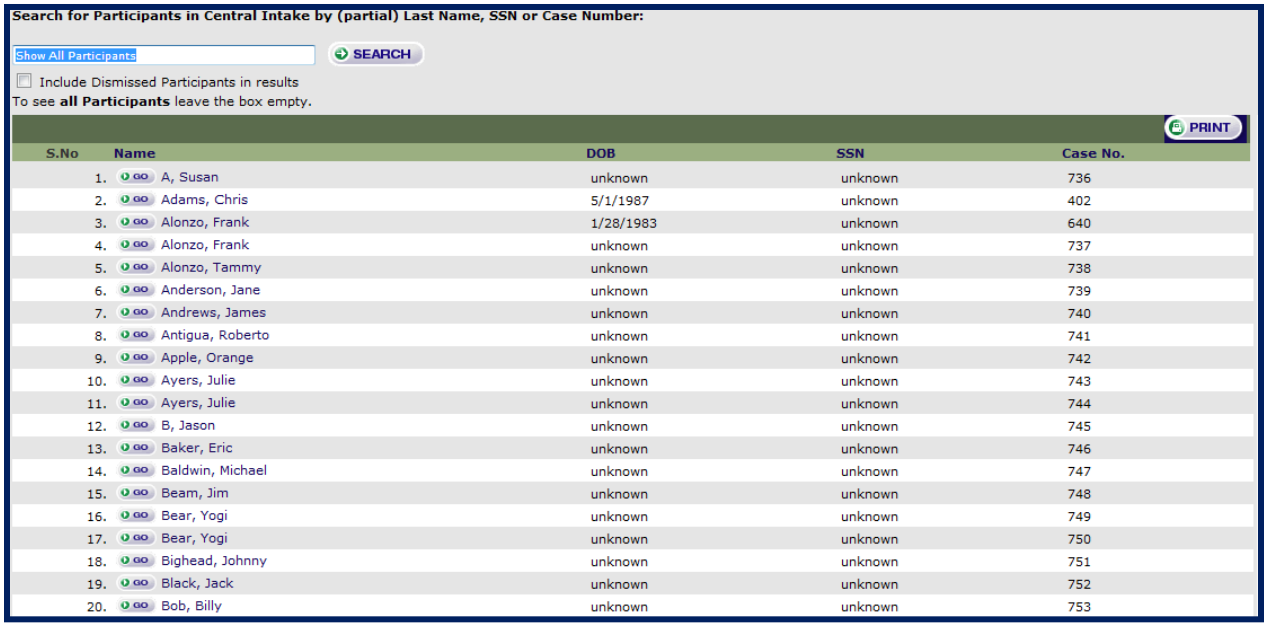
Step 1 – Click the **GO** button for Add or Edit Participant Assessments.



Step 2 - Type in the client's name, or leave the search box blank to Show All Participants. Check the box if you would like to include Dismissed participants in the results.

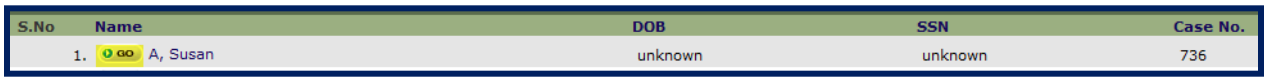


Step 3 - This will give you a list of all active participants in the program.



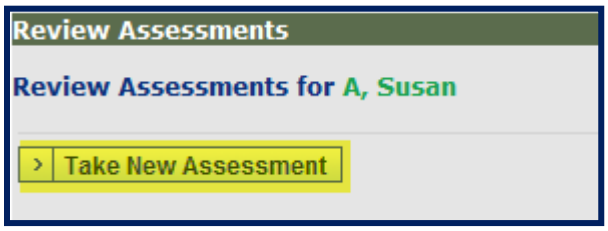
S.No	Name	DOB	SSN	Case No.
1.	A, Susan	unknown	unknown	736
2.	Adams, Chris	5/1/1987	unknown	402
3.	Alonzo, Frank	1/28/1983	unknown	640
4.	Alonzo, Frank	unknown	unknown	737
5.	Alonzo, Tammy	unknown	unknown	738
6.	Anderson, Jane	unknown	unknown	739
7.	Andrews, James	unknown	unknown	740
8.	Antigua, Roberto	unknown	unknown	741
9.	Apple, Orange	unknown	unknown	742
10.	Ayers, Julie	unknown	unknown	743
11.	Ayers, Julie	unknown	unknown	744
12.	B, Jason	unknown	unknown	745
13.	Baker, Eric	unknown	unknown	746
14.	Baldwin, Michael	unknown	unknown	747
15.	Beam, Jim	unknown	unknown	748
16.	Bear, Yogi	unknown	unknown	749
17.	Bear, Yogi	unknown	unknown	750
18.	Bighead, Johnny	unknown	unknown	751
19.	Black, Jack	unknown	unknown	752
20.	Bob, Billy	unknown	unknown	753

Step 4 - Choose the client that you wish to take the assessment for and click the **GO** button next to their name.

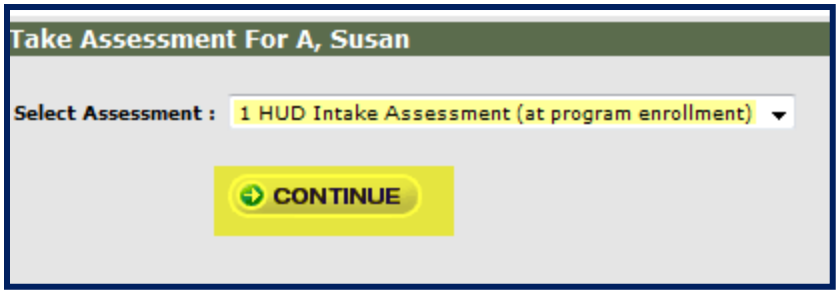


S.No	Name	DOB	SSN	Case No.
1.	A, Susan	unknown	unknown	736

Step 5 - Click **Take New Assessment** (you can also review any assessment that has been taken by the participant on this page).



Step 6 - Select **1 HUD Intake Assessment (at program enrollment)** from the drop down box and click **Continue**.



Step 7 - Fill out the month, day, and year that you are taking the assessment.

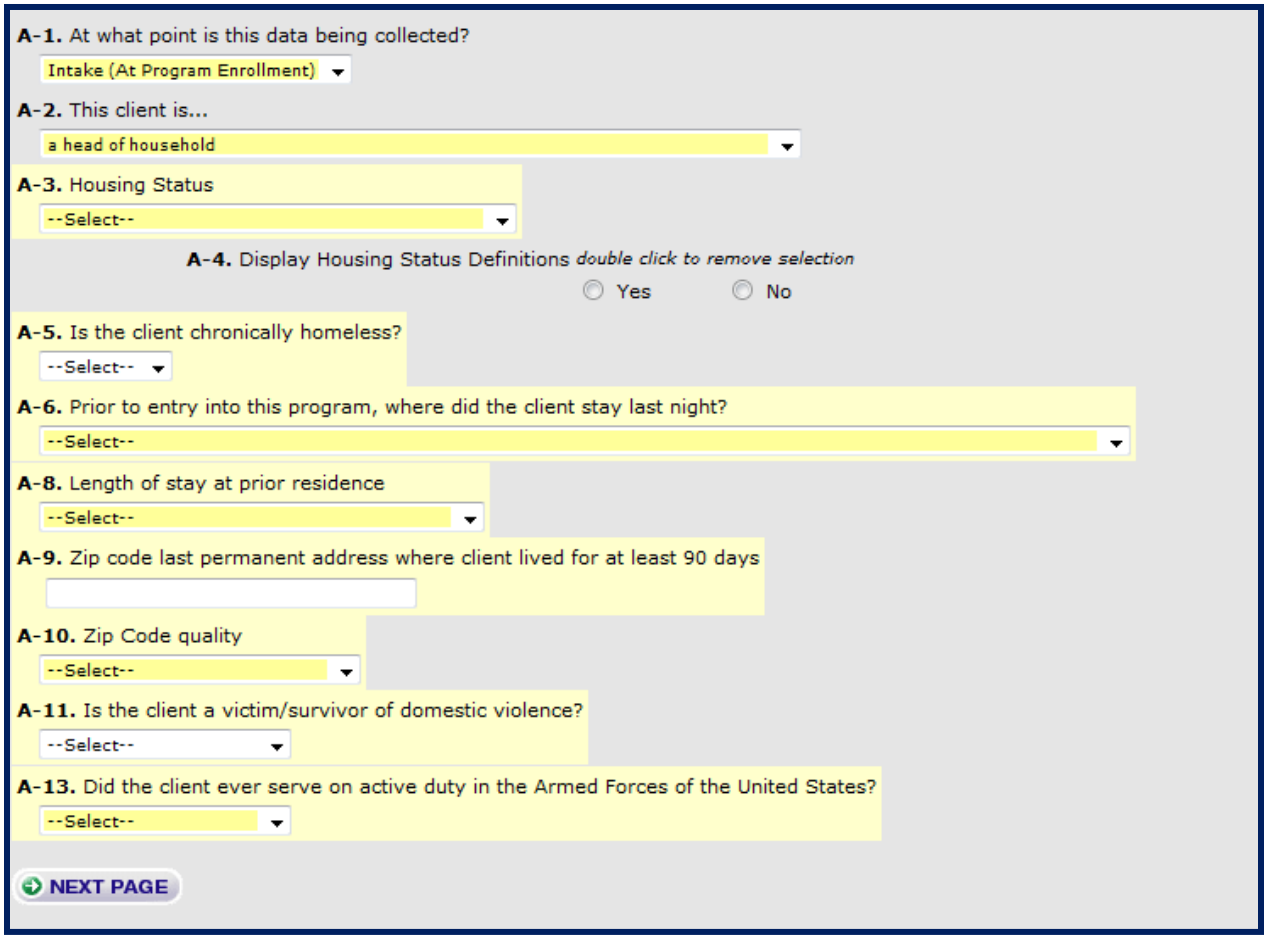
Please note that if you enter an Assessment Date that is earlier than the participant's Program Start Date, the assessment data will not appear in any of the HUD reports. For example, if Jane Fake has a Program Start Date of 1/2/2012, but an Assessment Date of 1/1/2012, her data will not appear in reporting. The Assessment Date could be the same as the Program Start Date or after that date.

Step 8 – There are three Pages (Tabs) for all of the Assessments: Universal Information, Disability Information, and Education, Employment and Income. The Exit Assessment also contains a fourth Page (Tab) for Exit Information.

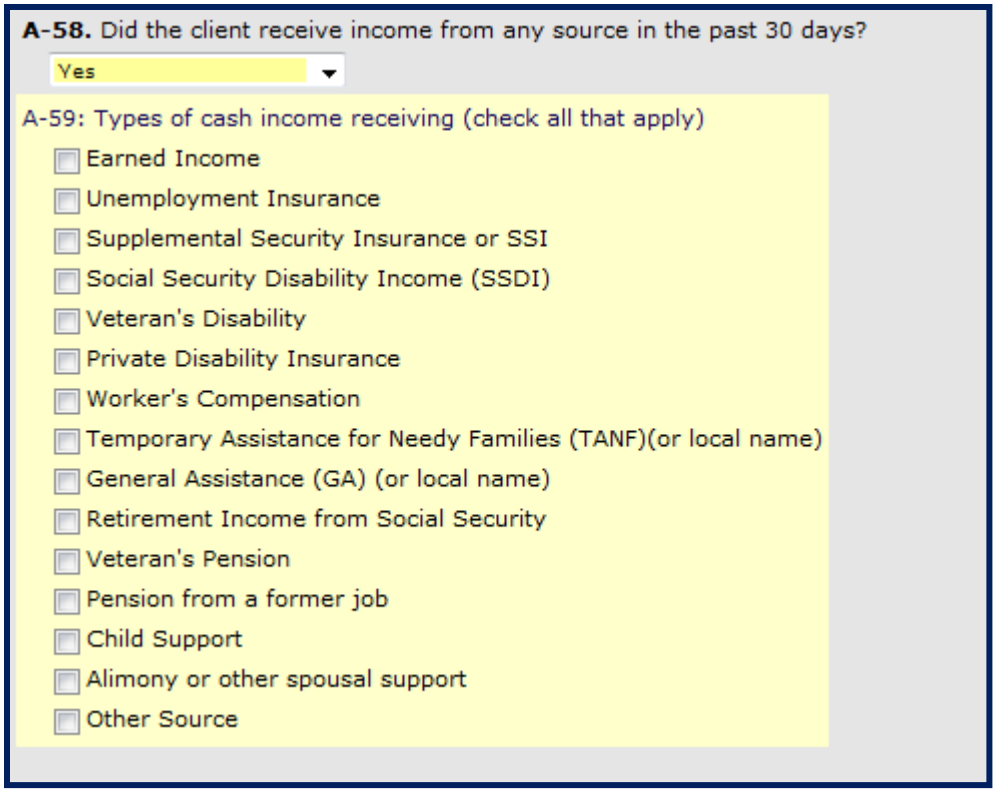
Continue on to take the assessment. Answer all of the questions on the page. If a field/drop down box is marked in YELLOW on the assessment, it is a required field.

Please note the question A2, This Client is…As you may know, there are certain HMIS questions that have been designated for all clients, adults only, unaccompanied youth and adults or just children. In ETO, we have designed the Assessment so the questions that need to be answered by the specific groups will load automatically for you when you select the correct category in the dropdown.

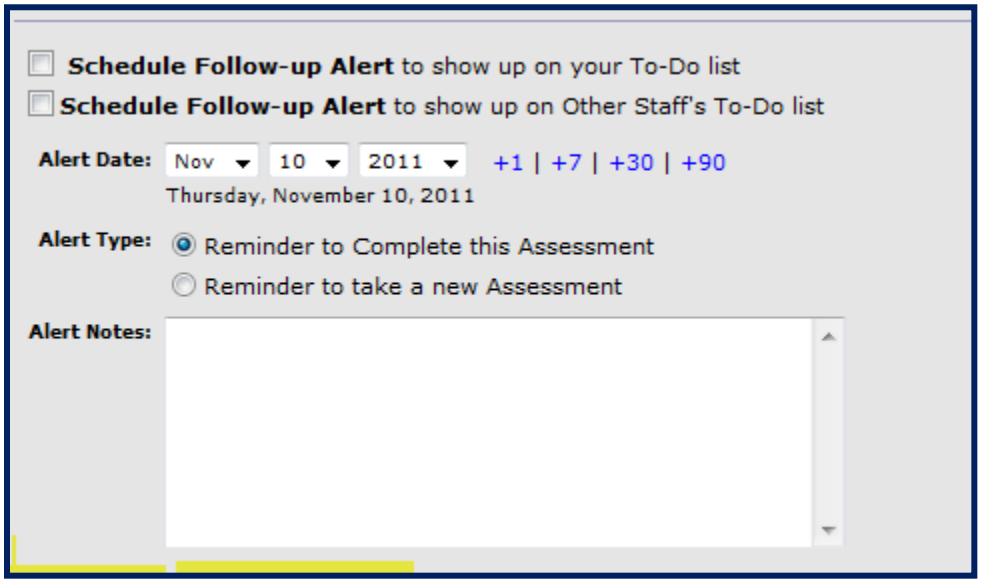
When finished, with the first Page click the **Next Page** button.



Please Note that some questions may have "Conditional Rules," where they open up to additional questions when answered a certain way. For example, A-58. Did the client receive income from any source in the past 30 days? If Yes, is selected another question appears asking for the Types of Income Received.

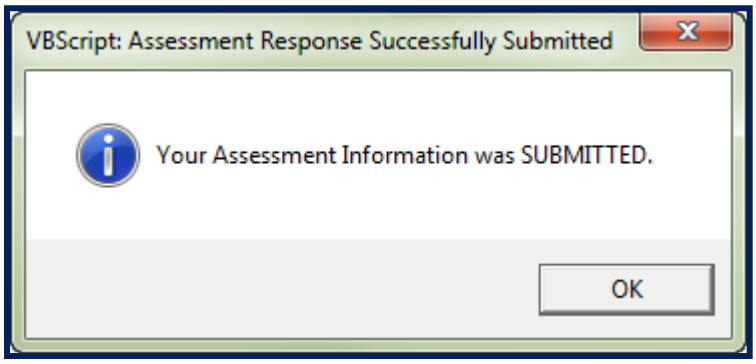


Step 9 - You can schedule a follow-up alert to show up on your **To-Do List** by filling out the boxes at the bottom of each screen. Select **Schedule Follow-up Alert to show up on your To-Do List**. Enter the **Alert Date** that you want to be reminded to complete the next Assessment. Click the **Reminder to take a new Assessment** and select the Assessment that would need to be taken on that date.



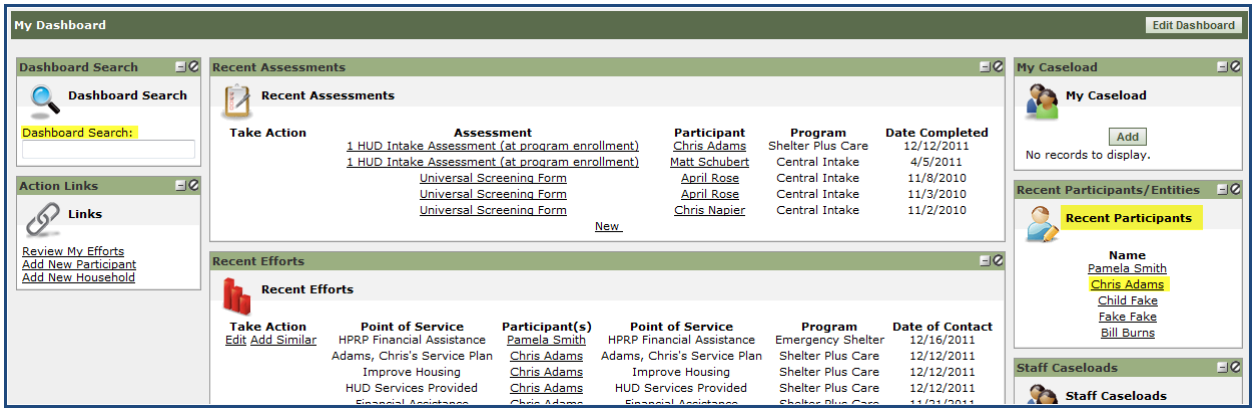
Step 10 - After completing all pages of the assessment, press **SUBMIT** to submit the assessment or **SAVE DRAFT** if you plan on coming back to it to finish and submit later. **Please note that if you do not remember to return and Submit the draft, that assessment will not appear in any HUD reporting.**

Step 11 - You will receive an alert like this when you have submitted your assessment, click **OK**.

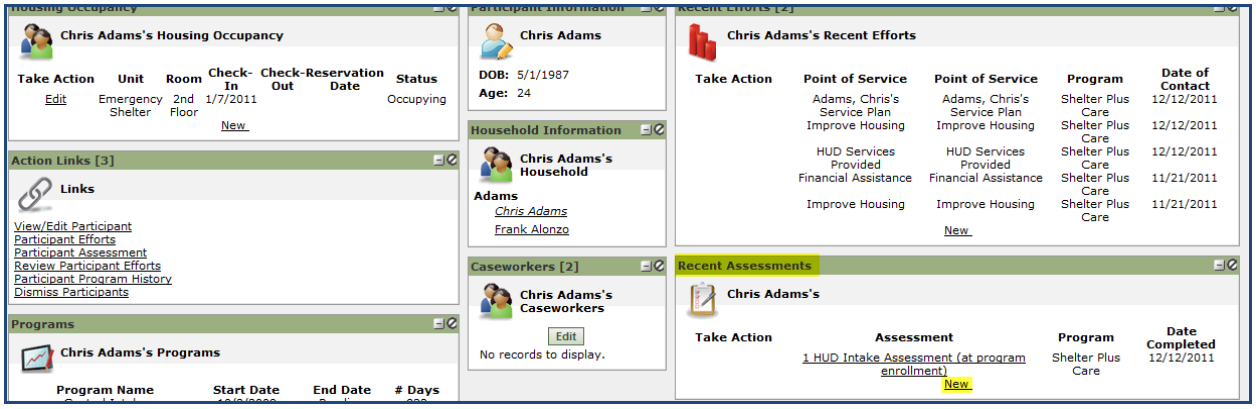


Add a New HUD Assessment from the Participant's Dashboard

Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – Once you are on the Dashboard for your participant. Click the **New** link within the **Recent Assessments** section.

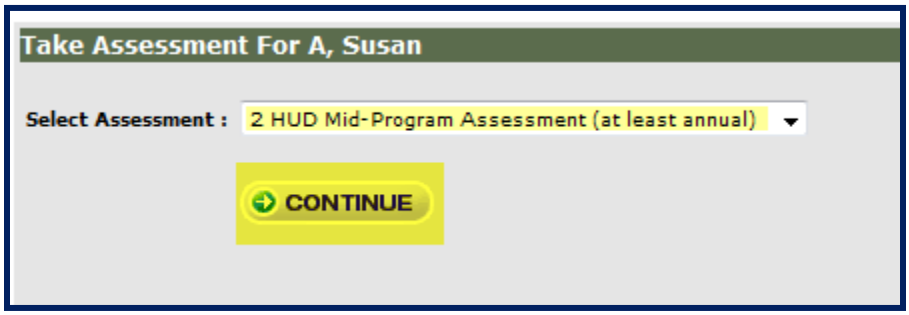


Step 3 - Follow **Steps 5 – 11** of **Add HUD Intake Assessment from Homepage**.

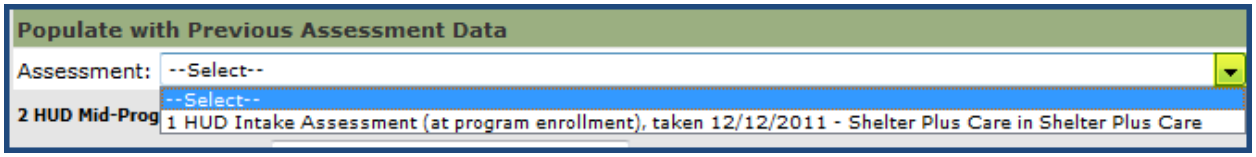
Pre-populate Assessments

In ETO Software you can pre-populate assessments from other assessments. For example, you can take a 1 HUD Intake Assessment for a participant and if they are still active a year later, you can pre-populate the 2 Mid-Program Assessment from the answers on the Intake.

Step 1- Start a New Assessment following the steps from **Adding New HUD Assessments**. This time select the 2 HUD Mid-Program Assessment or the 3 HUD Exit Assessment and click **Continue.**

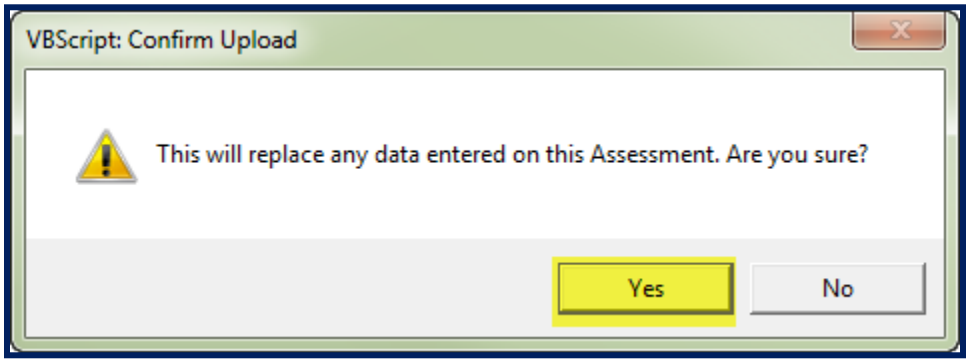


Step 2 - A drop down box will appear below the date. Select the assessment you wish to pre-populate from.



Step 3 - A pop-up will come up confirming that you would like to replace all data entered. Click **Yes**. This only means that it will replace the blank fields on your new

assessment with the answers from the Intake Assessment. You will only need to update any changes within the assessment.



Please note that not all Intake questions are required to be answered or updated on the Mid-Program Assessment. ETO automatically hides those questions for you. Also, the 1 HUD Intake Assessment is required for all participants upon program enrollment. The 2 Mid-Program Assessment is required for all participants who have been continuously enrolled in the program for at least one year. The 3 Exit Assessment is required upon Program Exit.

Edit Assessments

After submitting or saving as a draft, the response review screen will generate, along with a confirmation that the assessment has been submitted or saved as a draft in the system. The next screen will allow for review of answers and a link to go back to make edits if necessary. If a response needs to be modified, click **Edit** and you will be able to make those edits.

Review Assessment Information for A, Susan on 11/09/2011

EDIT CONTINUE

1 HUD Intake Assessment (at program enrollment)

A-1. At what point is this data being collected?

Intake (At Program Enrollment)

A-2. This client is...

a head of household

A-3. Housing Status

Literally Homeless

A-4. Display Housing Status Definitions

No

A-5. Is the client chronically homeless?

Yes

A-6. Prior to entry into this program, where did the client stay last night?

Safe Haven

A-7. Please list other prior residence

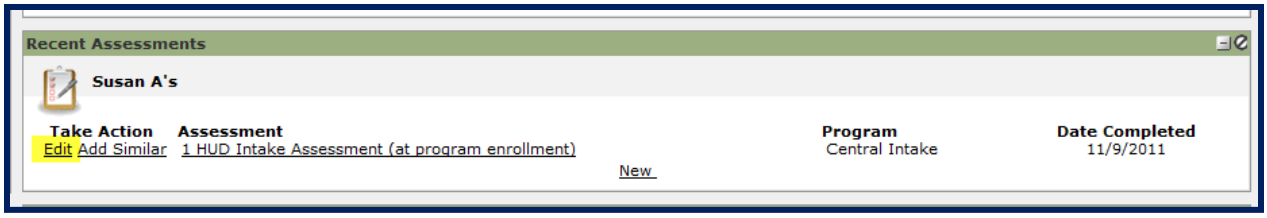
Not Answered

A-8. Length of stay at prior residence

More than three months, but less than one year

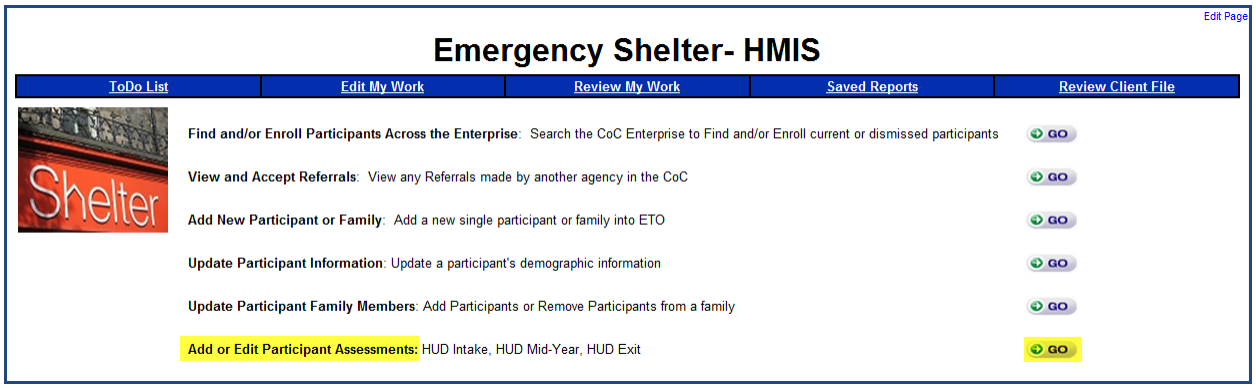
Edit Assessment from the Participant Dashboard

Step 1 - Under the client's recent assessments, you can click on **EDIT** next to the assessments name under Participant Assessments.

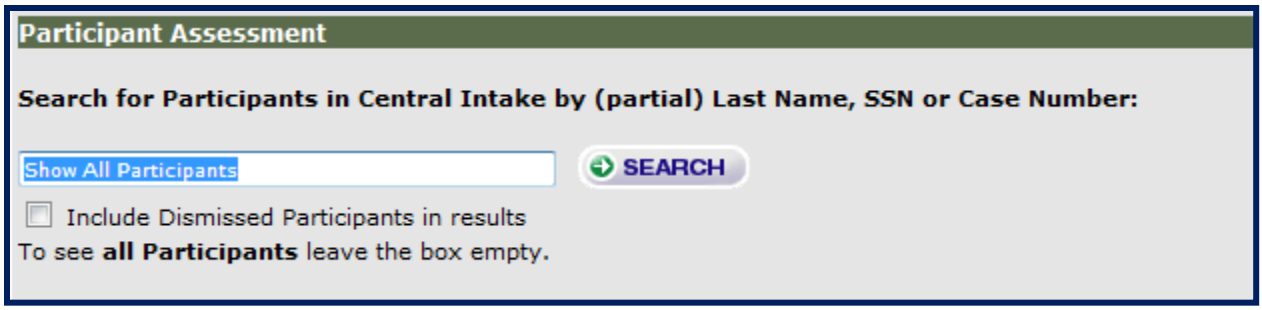


Edit Assessment from the Homepage

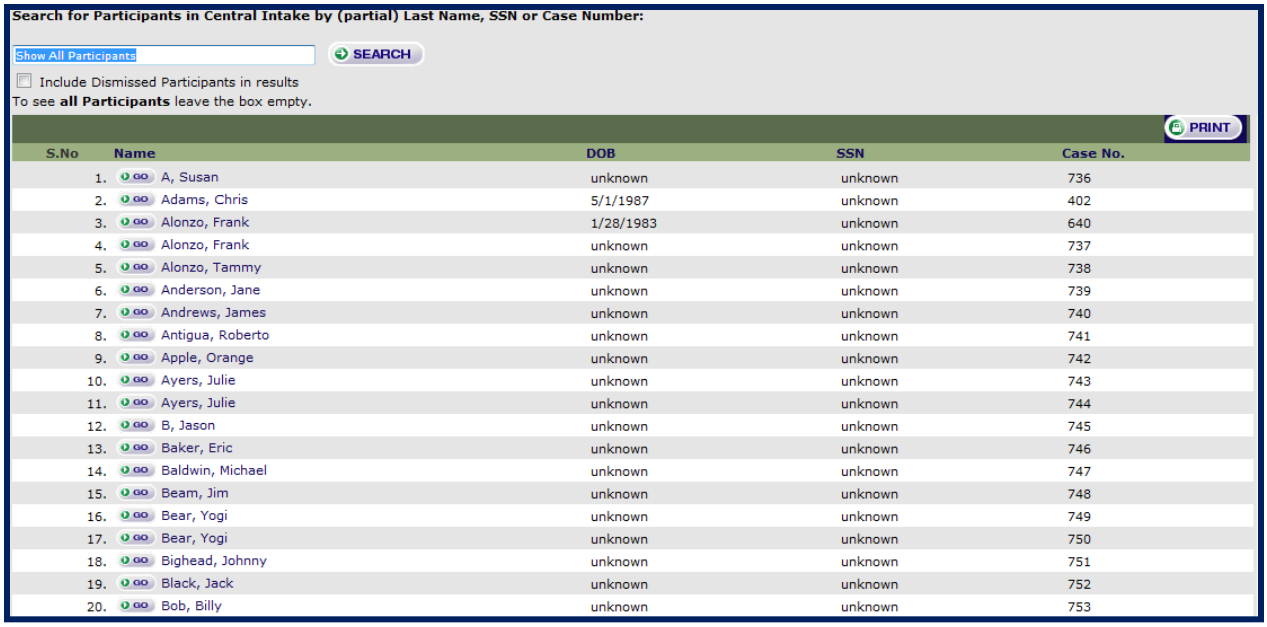
Step 1 – Click the GO button for Add or Edit Participant Assessments.



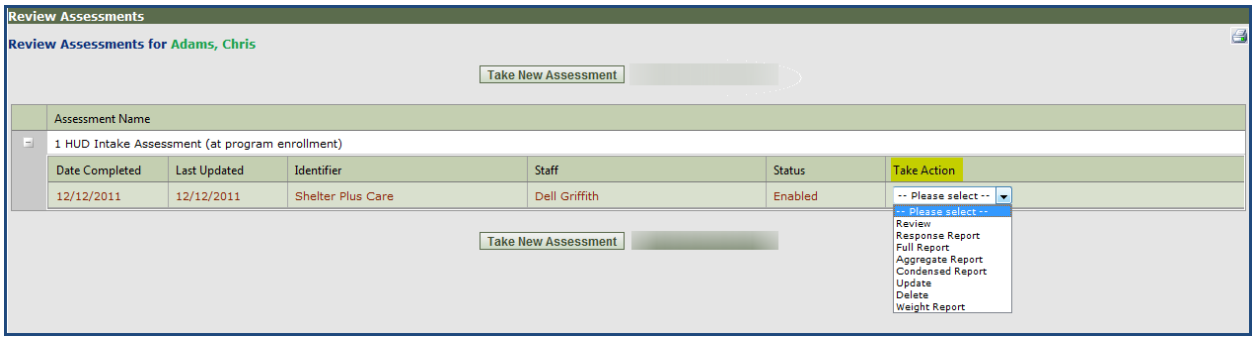
Step 2 - Type in the client's name, or leave the search box blank to Show All Participants. Check the box if you would like to include Dismissed participants in the results.



Step 3 - This will give you a list of all active participants in the program.



Step 4 - Choose the client that you wish to take the assessment for and click **GO** next to their name. This will take you to that Participant's Review Assessment Screen. In the drop down box next to the assessment you wish to update, choose the action **Update**.



Other options in the Take Action List:

1. Review – shows a read only version of your assessment data. This is helpful if you are unable to run Crystal Reports on your computer.

2. Response Report – a Crystal Report containing a print out of all assessment questions that were answered and the answers to those questions.

3. Full Report – a Crystal Report containing all questions, choices, and selected answers in the assessment, including those that were not answered.

4. Aggregate Report – a Crystal Report for assessments that have been completed multiple times for the selected participant. The report aggregates the data entered into those assessments.

5. Condensed Report – a Crystal Report that is abbreviated because the large header only appears on page 1.

6. Update – allows edits to an existing assessment. This option only appears if the Site Administrator has not set up the assessment to prevent updates.

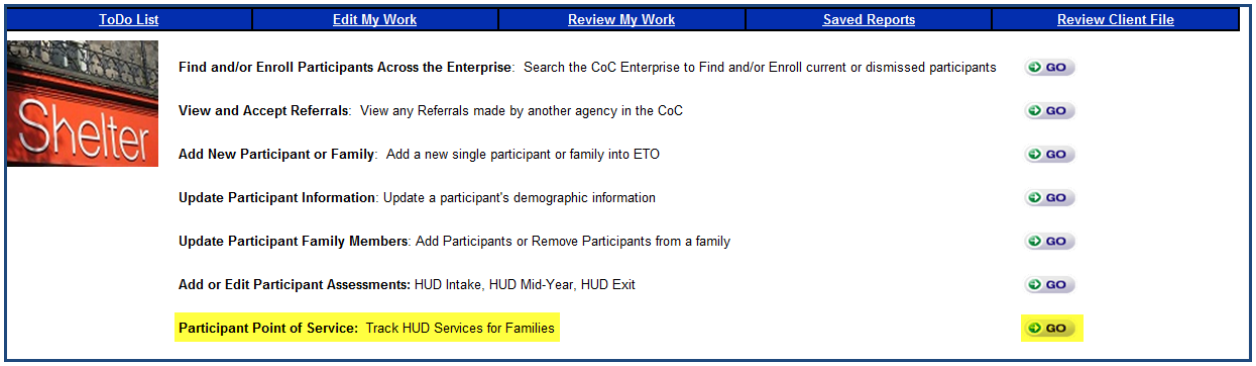
7. Delete – this option is only available to Site Administrators and deletes the entire selected individual assessment.

8. Weight Report – This option only appears for assessments that contain weighted elements. The Crystal report contains a table that contains the questions, responses, and weight values.

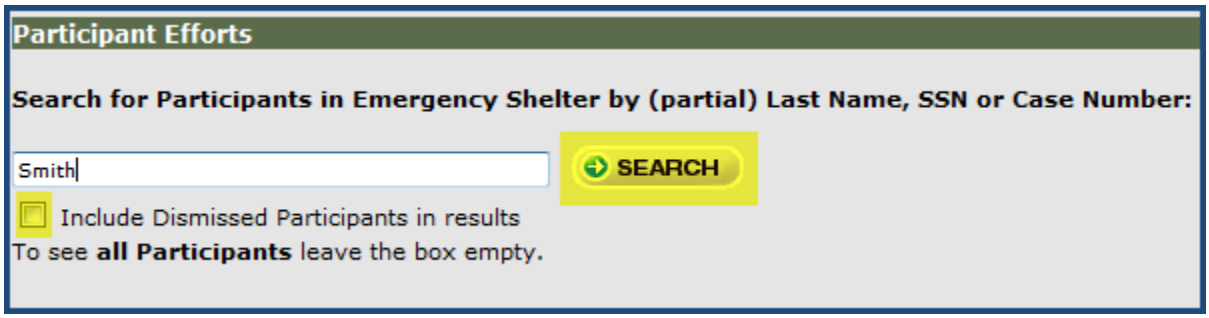
Recording HMIS Services

Recording Services from Homepage

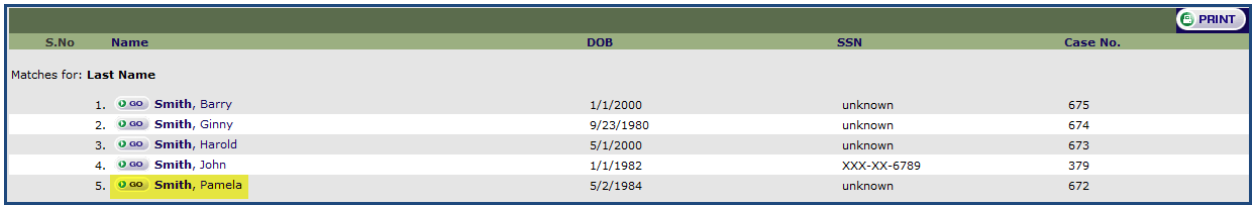
Step 1 – From the Homepage, click the **Go** button for **Participant Point of Service: Track HUD Services for Families**.



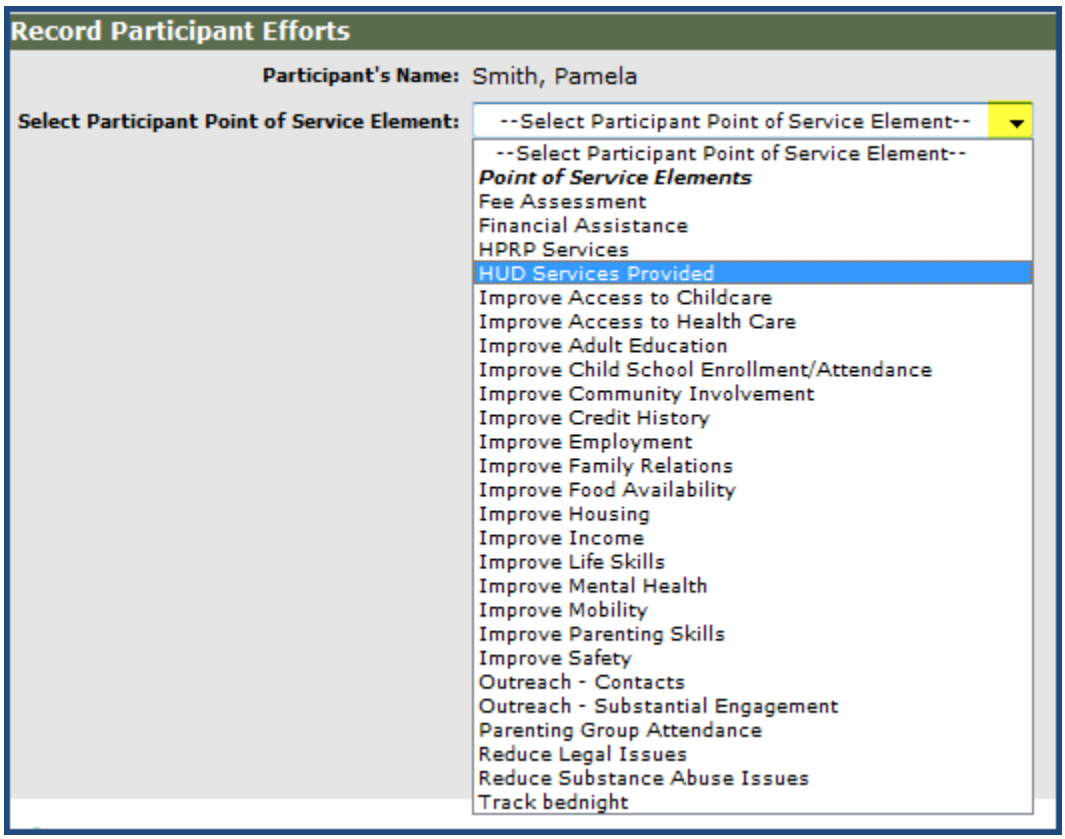
Step 2 – Enter the name of the client you need to enter services for and click **Search**. If you need to enter services for someone who was dismissed, click the box to **Include Dismissed Participants** in the search results.



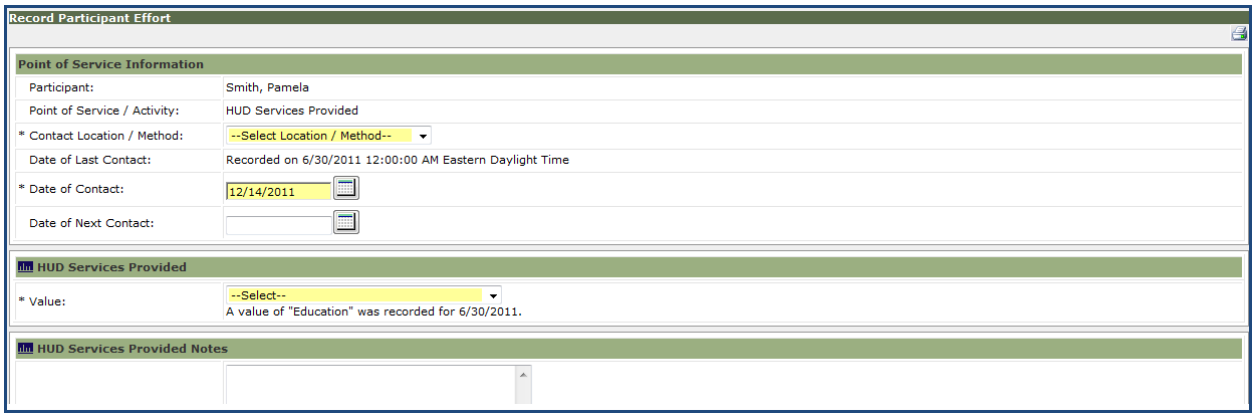
Step 3 – Click the **name** or **Go** button of the person you are searching for.



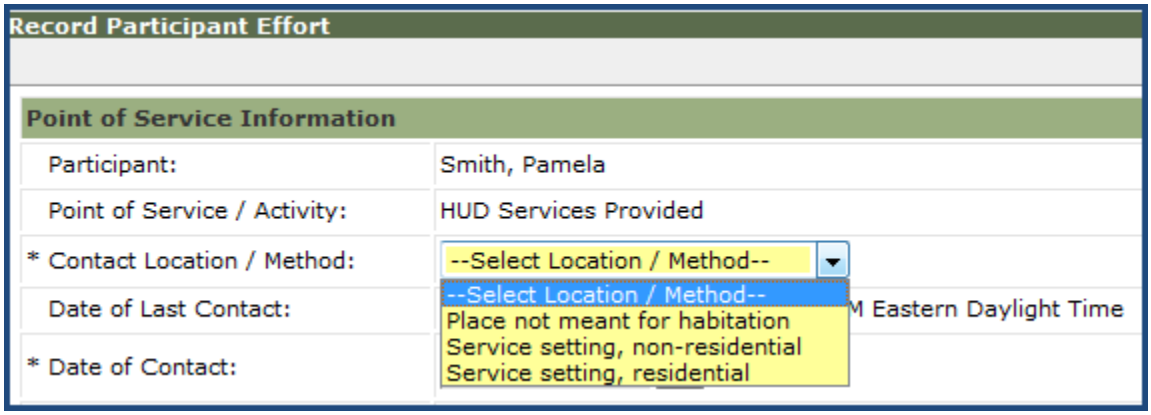
Step 4 – On the Record Participant Efforts screen, click the dropdown arrow for **Point of Service Elements** and select **HUD Services Provided**. Click **Submit**.



Step 5 – This is the Record Participant Effort Screen.



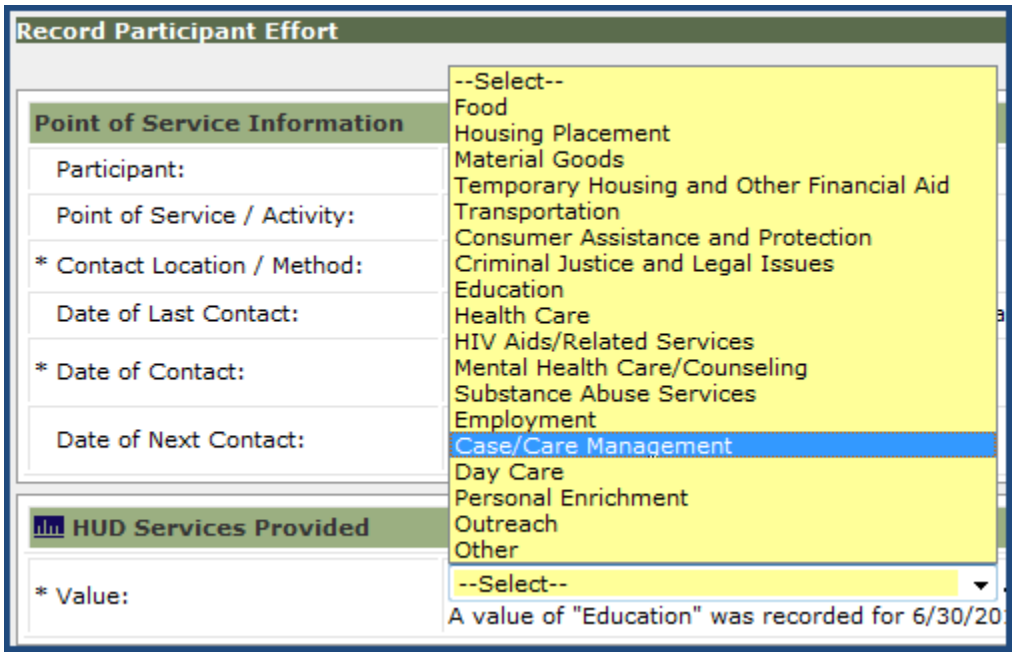
Step 6 - Select the **Contact Location/Method**. There are three (3) selections that are part of the HUD requirements: Place not meant for habitation; Service setting, non-residential; and Service setting, residential.



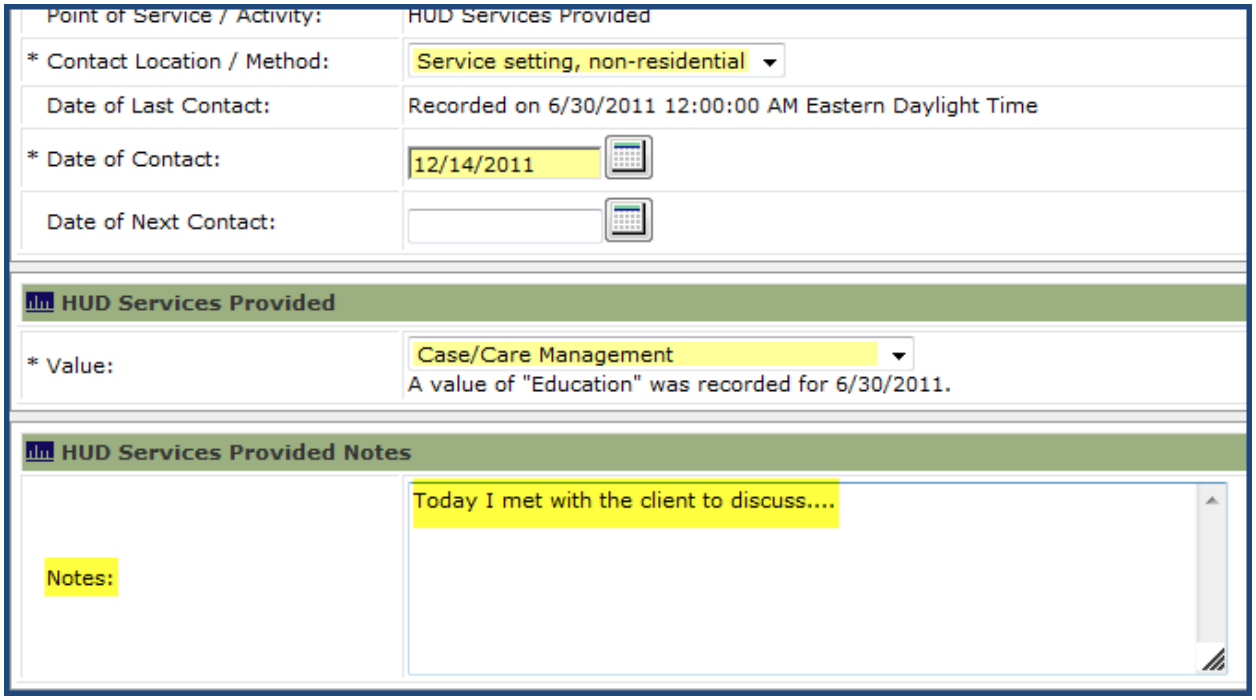
Step 7 – The **Date of Contact** defaults to "Today's Date". If you need to change the date to be in the past you may do so. You can't enter a future Date.

Date of Next Contact is optional. If you want a next appointment with this client to appear on your To Do List, you may enter a date in the future.

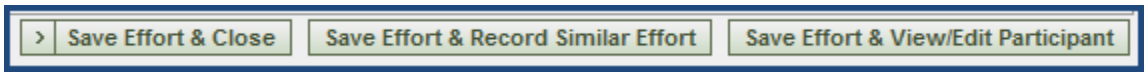
Step 8 – Click the dropdown arrow for the **HUD Services Provided** value. You will see a list of HUD Services, select the services provided for the client.



Step 9 – You may enter notes about this client contact in the HUD Services Provided Notes field.



Step 10 – When you have finished recording the services for this client, you will see three buttons at the bottom of the screen which will allow you to save your work.



Save Effort & Close will save your data and take you back to the Search for Participant screen.

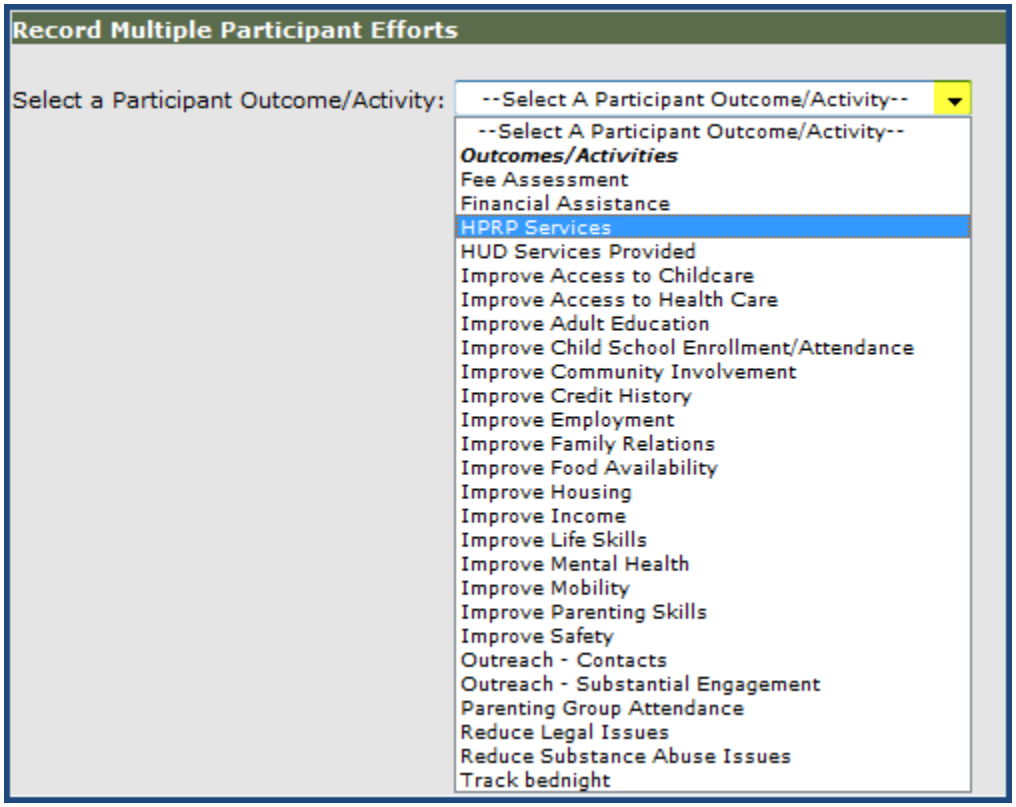
Save Effort & Record Similar Effort will save your data and take you back to the same client's Record Participant Efforts screen. You will want to do this if you provide more than one HUD service for this client during the same contact time. For example, above we entered a service for Case/Care Management. If we also gave the client food, we could click the Save Effort & Record Similar Effort and select the Food service listed in the valued dropdown for the same Date of Contact.

Save Effort & View/Edit Participant will save your data and take you back to the client's demographic screen.

Entering Data for HPRP Services

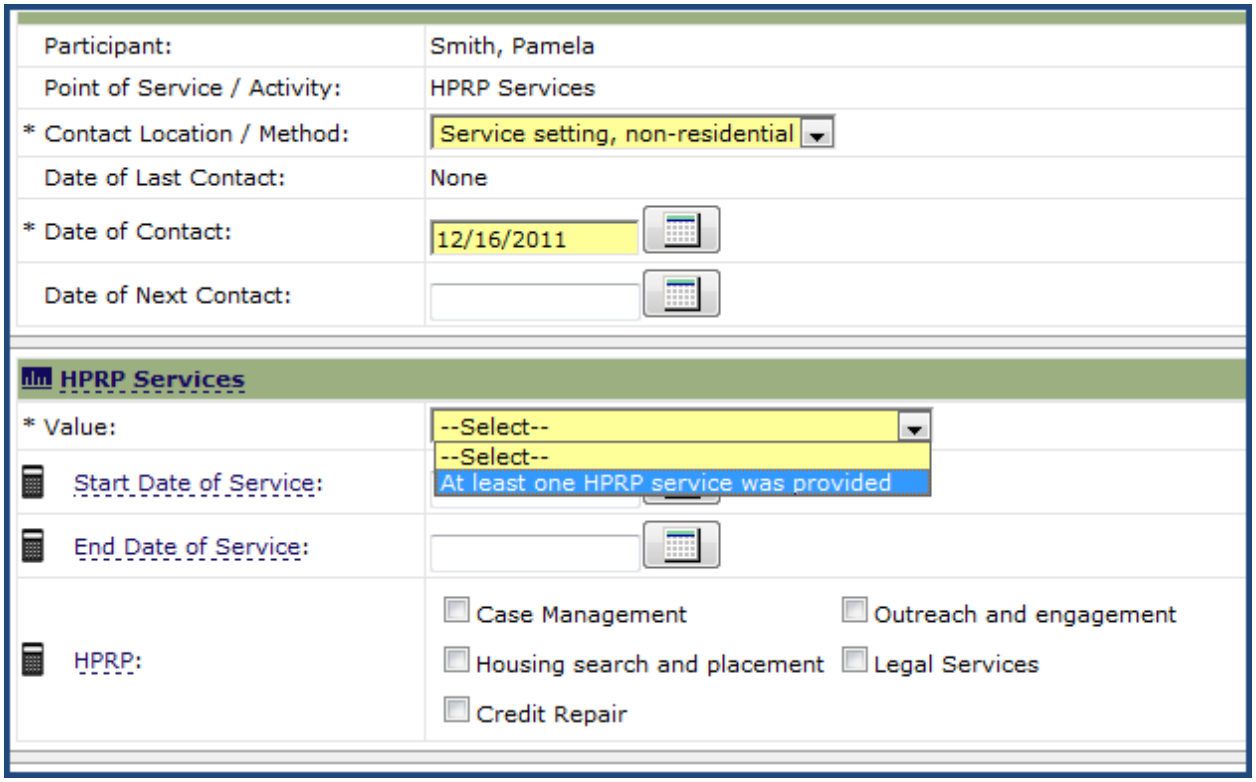
Follow Steps 1 – 3 from Entering Data for HUD Services

Step 4 – On the Record Participant Efforts screen, click the dropdown arrow for **Participant Outcome/Activity** and select HPRP Services. Click **Submit**.



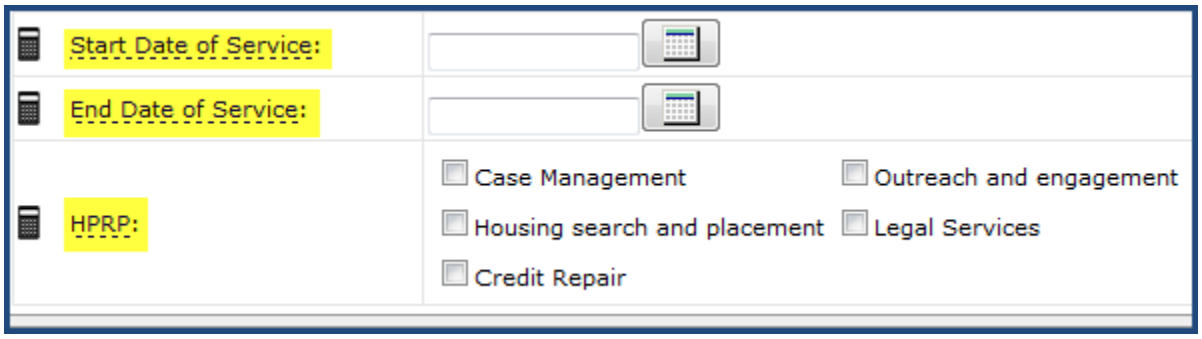
Follow Steps 6 & 7 from Entering Data for HUD Services

Step 8 - Click the dropdown arrow for the **HPRP Services** value. You will see there is only one choice in this dropdown. Select **At least one HPRP service was provided**.



Step 9 – There are three (3) Effort Qualifiers attached to this Service. You must enter a Start Date of Service and an End Date of Service. Even if they start and end on the same day, the date must be entered.

Select any of the services provided for HPRP: Case Management, Housing search and placement, Credit Repair, Outreach and engagement, and Legal Services.



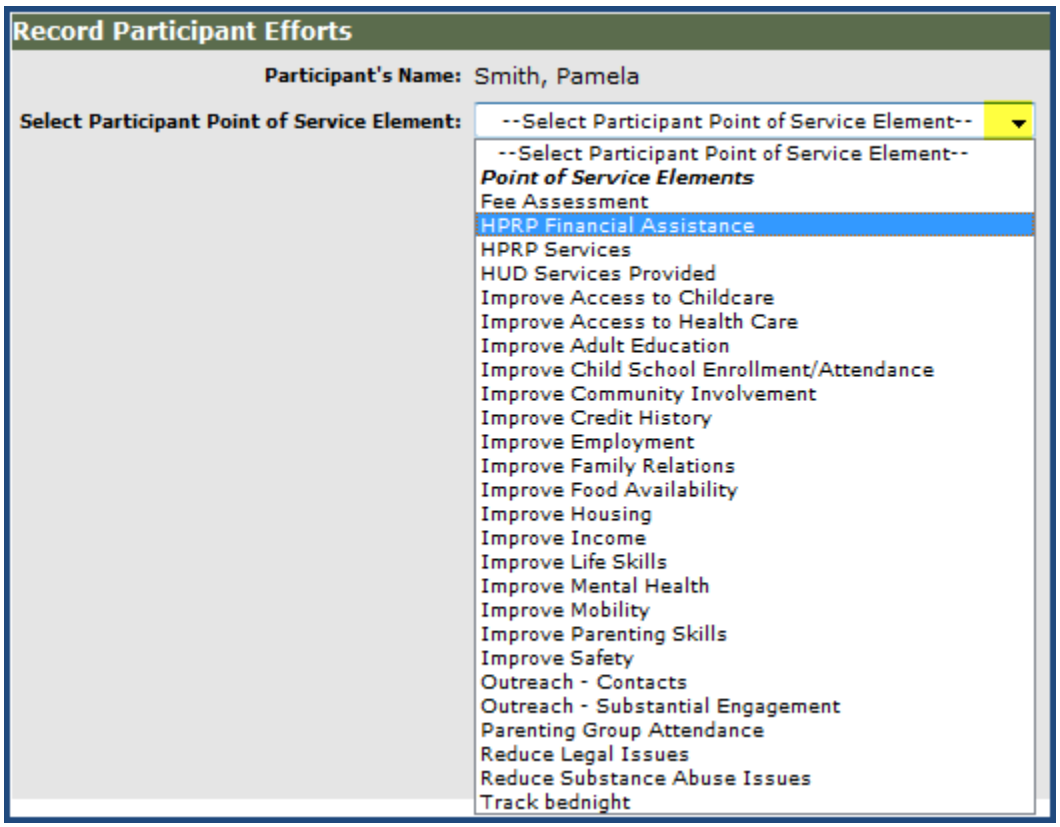
Please Note - If these 3 Effort Qualifiers are not completed, this service will NOT appear in your HPRP QPR Report or your APR Report.

Follow Steps 9 & 10 from Entering Data for HUD Services.

Entering Data for HPRP Financial Services

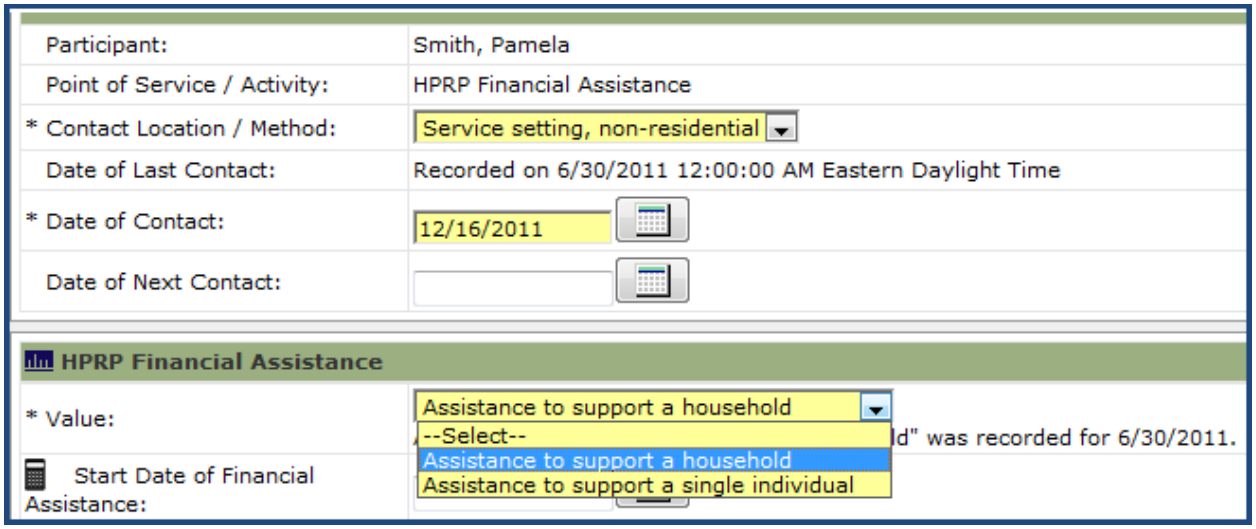
Follow Steps 1 – 3 from Entering Data for HUD Services

Step 4 – On the Record Participant Efforts screen, click the dropdown arrow for **Point of Service Elements** and select **HPRP Financial Assistance**. Click **Submit**.



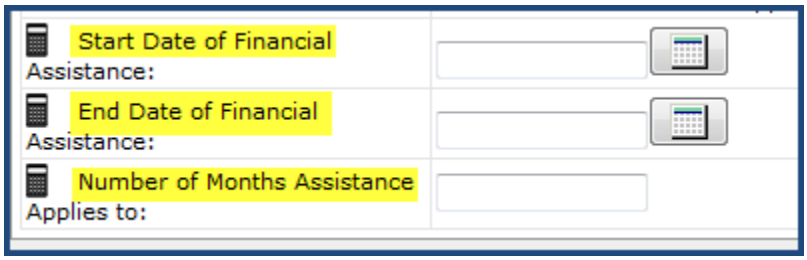
Follow Steps 6 & 7 from Entering Data for HUD Services

Step 8 - Click the dropdown arrow for the **HPRP Services Value**. You will see there is two choices in this dropdown. Select either choice of: Assistance to support a household or Assistance to support a single individual.



Step 9 – There are 3 Effort Qualifiers attached to this Service. You must enter a Start Date of Service and an End Date of Service. Even if they start and end on the same day, the dates must be entered.

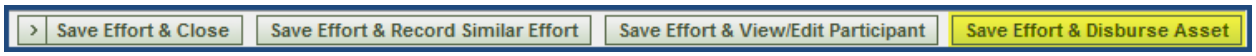
Enter the Number of Months Assistance that this assistance applies to.



Please Note - If these 3 Effort Qualifiers are not completed, this service will NOT appear in your HPRP QPR Report or your APR Report.

Follow Step 9 from Entering Data for HUD Services.

Step 10 – When you have finished recording the services for this client, you will see four buttons at the bottom of the screen which will allow you to save your work. Below all four buttons will be described, BUT for HPRP Financial Assistance, you will want to click the **Save Effort & Distribute Asset**.



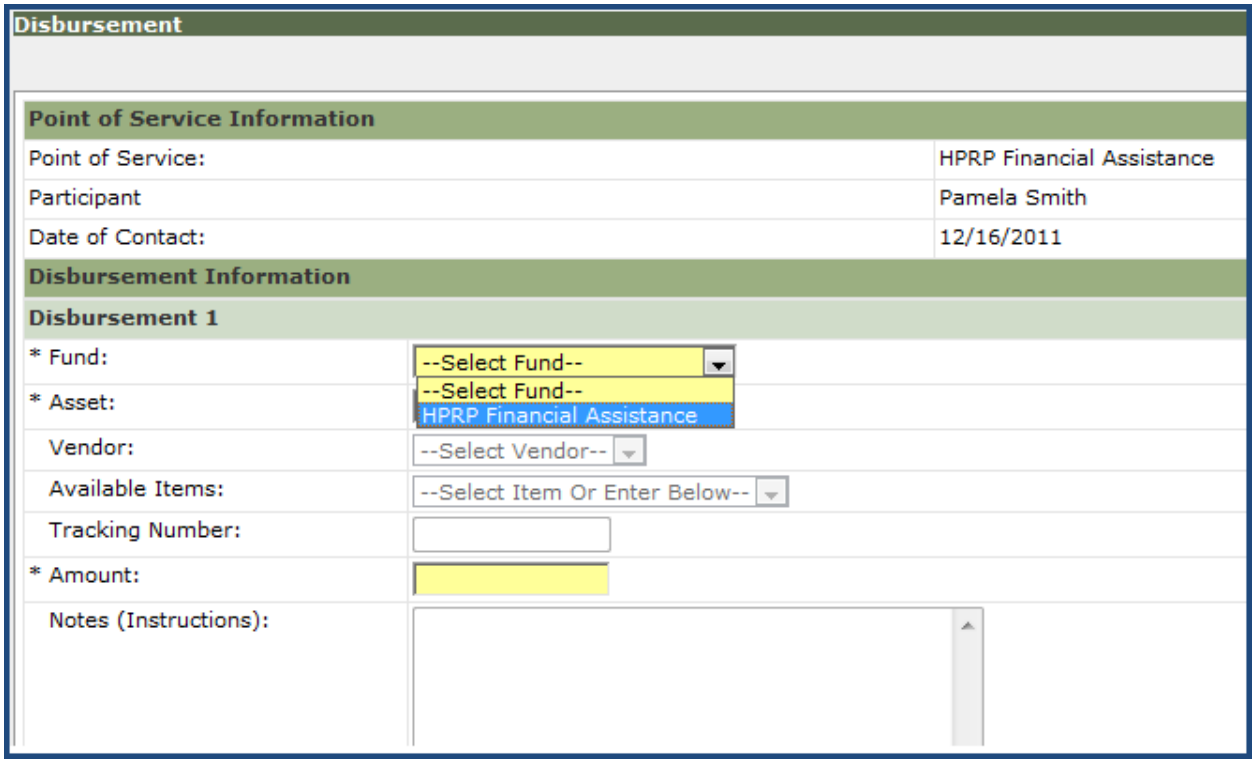
Save Effort & Close will save your data and take you back to the Search for Participant screen.

Save Effort & Record Similar Effort will save your data and take you back to the same client's Record Participant Efforts screen. You will want to do this if you provide more than one HUD service for this client during the same contact time. For example, above we entered a service for Case/Care Management. If we also gave the client food, we could click the Save Effort & Record Similar Effort and select the Food service listed in the valued dropdown for the same Date of Contact.

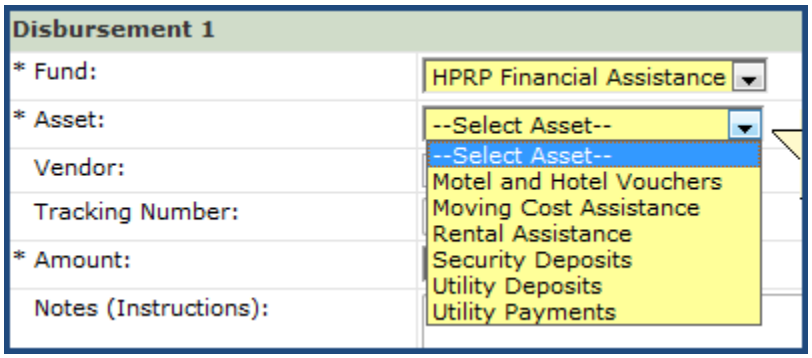
Save Effort & View/Edit Participant will save your data and take you back to the client's demographic screen.

Save Effort & Disburse Asset will save your data and take you to the Funds Disbursements screen.

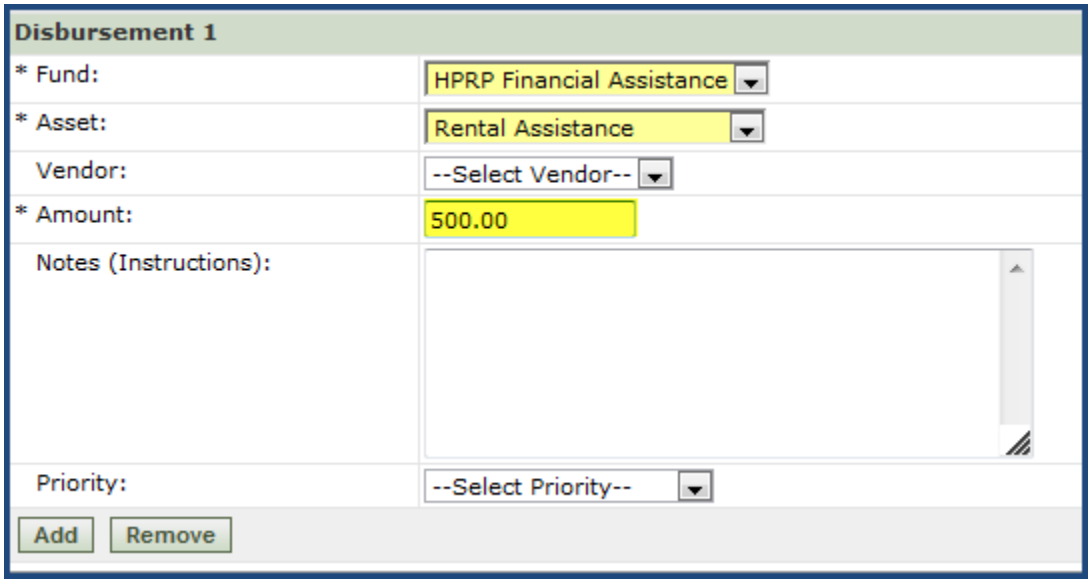
Step 11 – Select the **Fund** from which the assistance is coming from for this client.



Step 12 – Select the **Asset** (Reason for Assistance) from the Asset Dropdown list.



Step 13 – Enter the **Amoun**t of the Financial Assistance.



Step 14 – You may enter any notes for the Financial Assistance.

Step 15 – If you would like to enter another Funds Disbursement for this client, click the Add button. If you made a mistake and you wish to remove the Disbursement, click Remove. Once you have completed the transaction, click **Save**.

Step 16 – You will be taken to a Voucher Report for this Transaction. If you choose to, you may print this Voucher for the Client or your records.

HMIS Demonstration Site

84

P: 672

VOUCHER

PURPOSE: Rental Assistance DATE: 12/16/2011

NOT TO EXCEED: Five Hundred and 0/100 Dollars $ 500.00

FUND: HPRP Financial Assistance

FUNDER:

VENDOR:

DETAILS:

NOTES (INSTRUCTIONS):

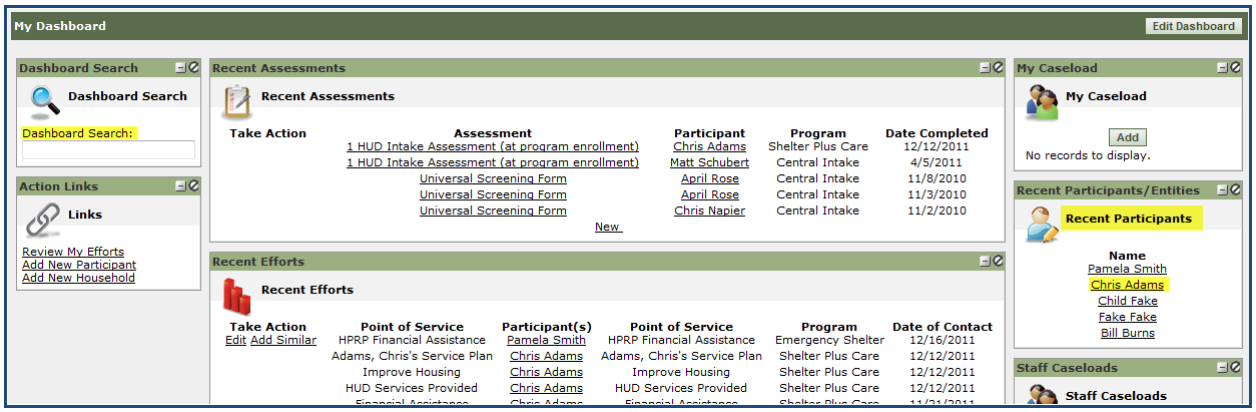
PURCHASER: Pamela Smith

Staff Signature (If Applicable)
Dell Griffith

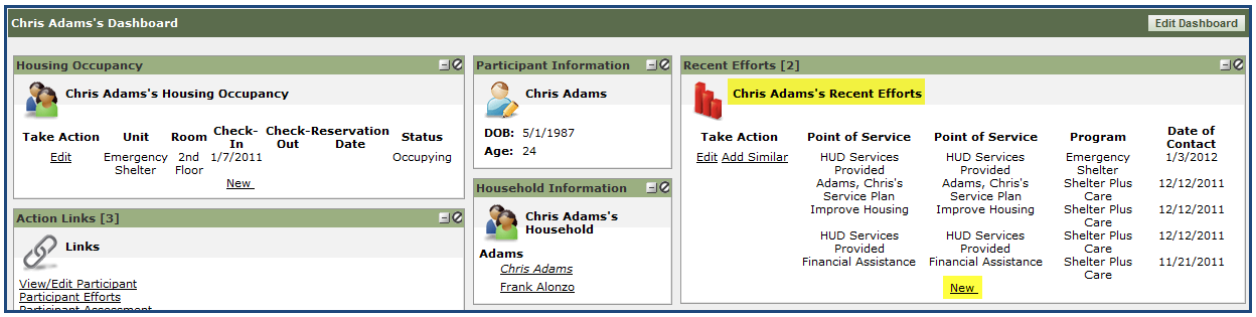
PARTICIPANT COPY

Recording Services from Participant Dashboard

Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – Once you are on the Dashboard for your participant. Click the **New** link within the **Recent Efforts** section.

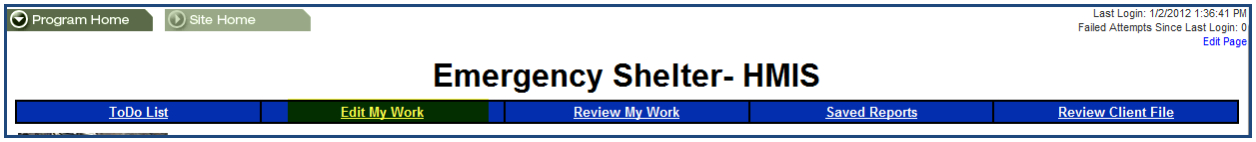


Step 3 – Follow **Steps 4 – 16** Recording Services from Homepage.

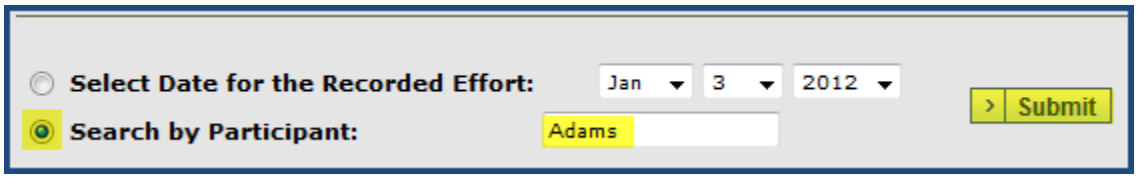
Edits for HMIS Services

Edits from the Homepage

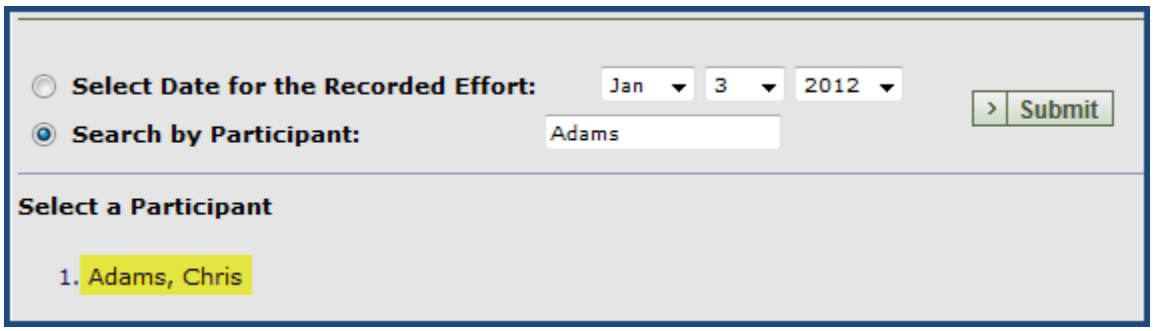
Step 1 – Click the **Edit My Work** link.



Step 2 – There are two (2) choices for searching: Select Date for Recorded Effort or Search by Participant. Enter your search criteria and click **Submit**.

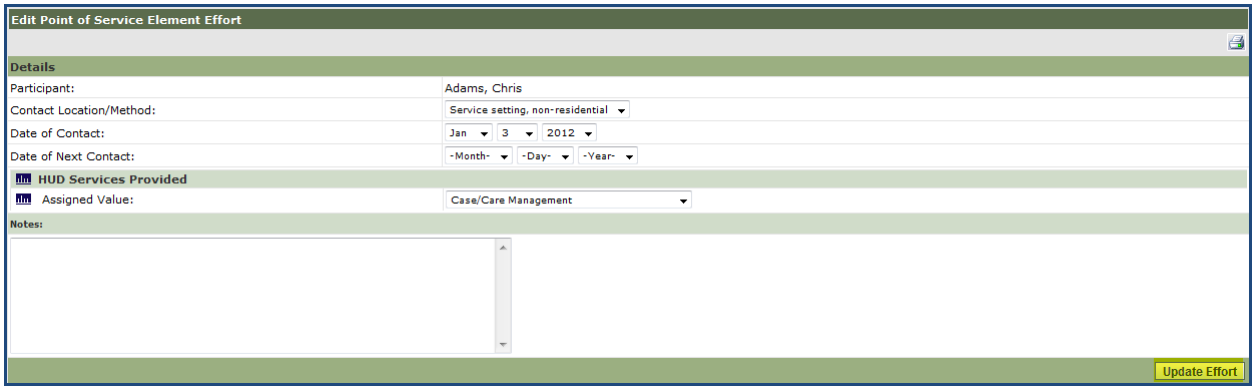


Step 3 – Click the **name of the Participant**.

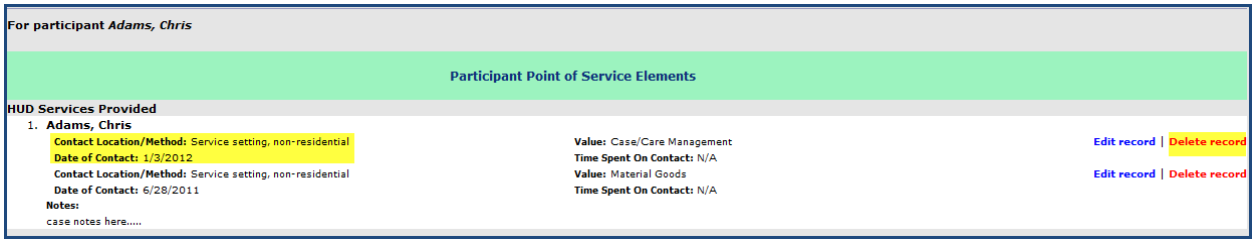


Step 4 – Find the Service that needs to be edited and click **Edit Record**.

Step 5 – Edit the Service as needed and click **Update Effort**.

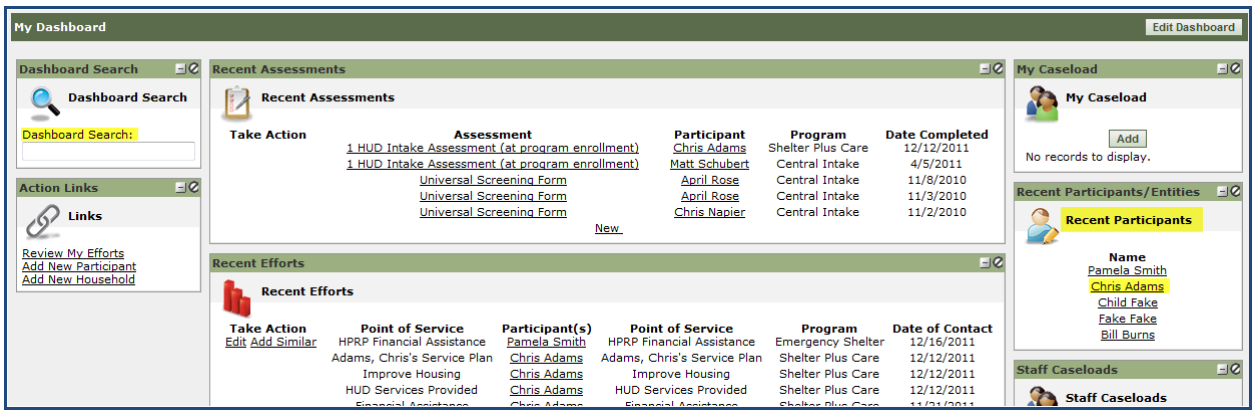


Step 6 – You may also delete a Service by clicking the Delete Record.

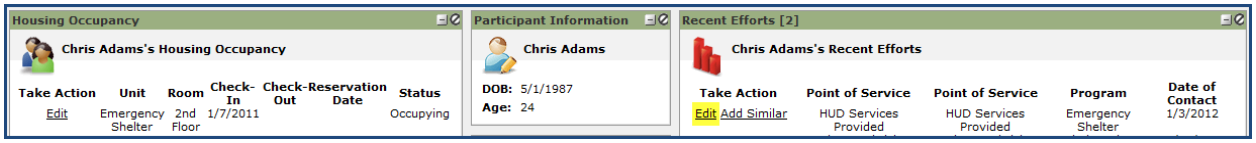


Edits from the Participant Dashboard

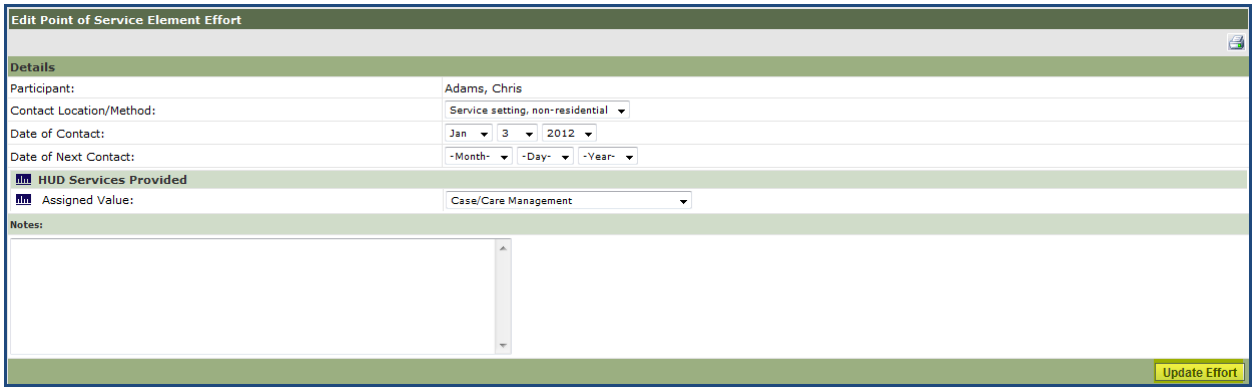
Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – Once you are on the Dashboard for your participant. Click the **Edit** link within the **Recent Efforts** section. Make sure you select the Edit next to the Service that needs to be edited.



Step 3 - Edit the Service as needed and click **Update Effort**.



Please note that you can't delete a service from the Participant Dashboard. If you need to delete a service you must perform that action from the Homepage link. Also, if you need to edit Funds Disbursements, use the Homepage link.

Client/Family Referrals

Within ETO HMIS, you can make different types of Client Referrals:

1. Refer a client to an **outside agency (Entity)** for additional services.
2. Refer a client to **another program (Program)** within your own agency.
3. Refer a client **to another agency and program (Site)** within your CoC.

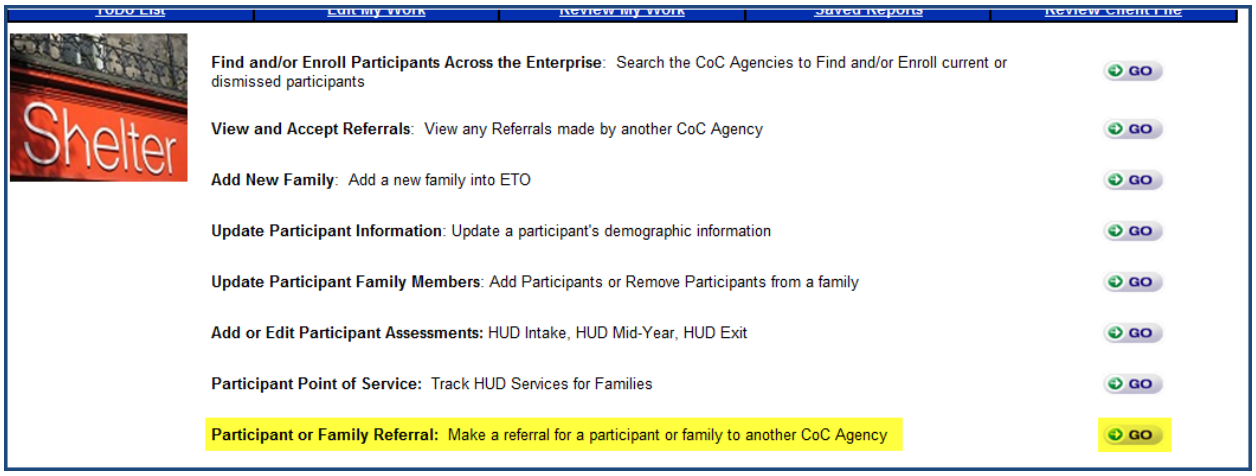
There are 2 ways to make a referral:

1. Using the **Participant Dashboard**
2. Using the **Homepage** link.

Please note: If you want to make a referral for a Family or Multiple Clients you must use the Homepage link. The participant Dashboard will only allow you to make a referral for that participant.

Homepage Referral

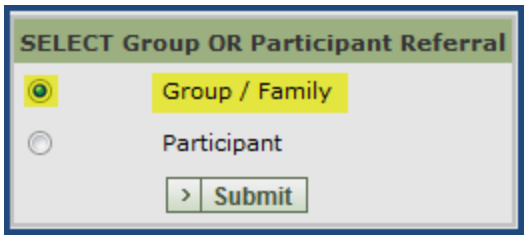
Step 1 – From the Homepage, click the **Go** button for **Participant or Family Referral**.



Step 2 – You will have 2 choices. You can do the referral for a Family or for one or multiple participants.

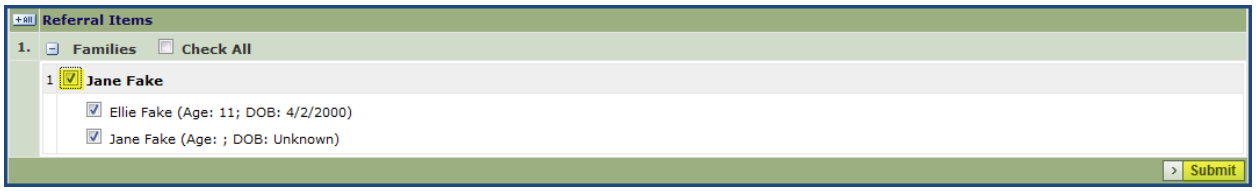
Selecting a Family

Step 3 – Select the radio button for **Group/Family** and click **Submit.**



Step 4 – You can click the **+** to see all Families in this program for selection or you can click **Check All** to do a referral for All Families in the program. Click **Submit.**

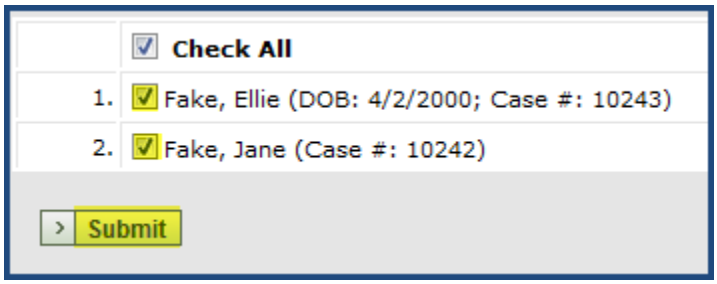
Step 5 – Find the Family you are looking for and click the **checkbox** next to the Family name**. Click Submit.**



Selecting Participants

Step 3 – Select the radio button for **Participant** and click **Submit.**

Step 4 – You will see a list of all Active Participants in this program. Click the box next to all Participants that you wish to make the referral and click **Submit.** If you would like to choose ever participant, click **Check All**.



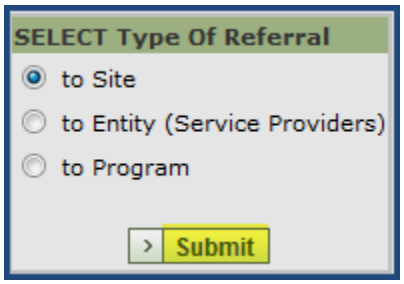
Recording the Referral

Remember, you can make different types of Client Referrals:

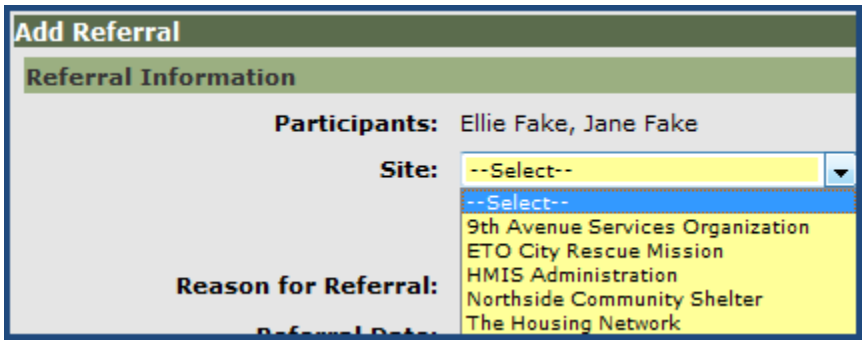
1. **To Site** - Refer a client to another agency and program within your CoC
2. **To Entity (Service Provider) -** Refer a client to an outside agency for additional services.
3. **To Program -** Refer a client to another program within your own agency.

Referral to Site

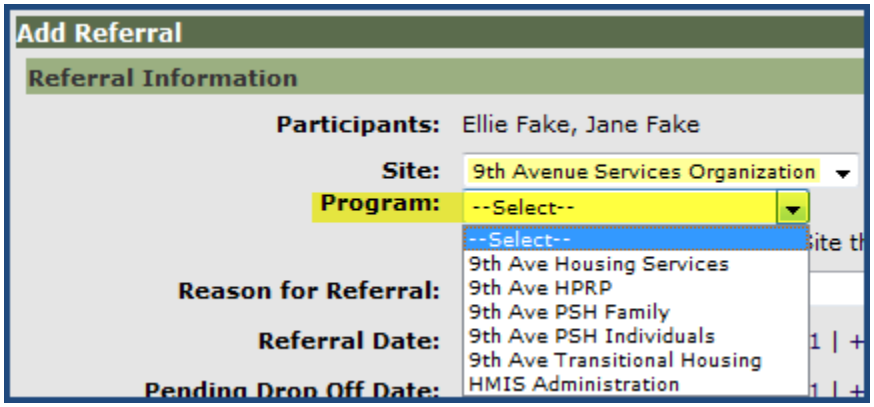
Step 1 – If you are referring a client **To Site**, select that radio button and click **Submit**.



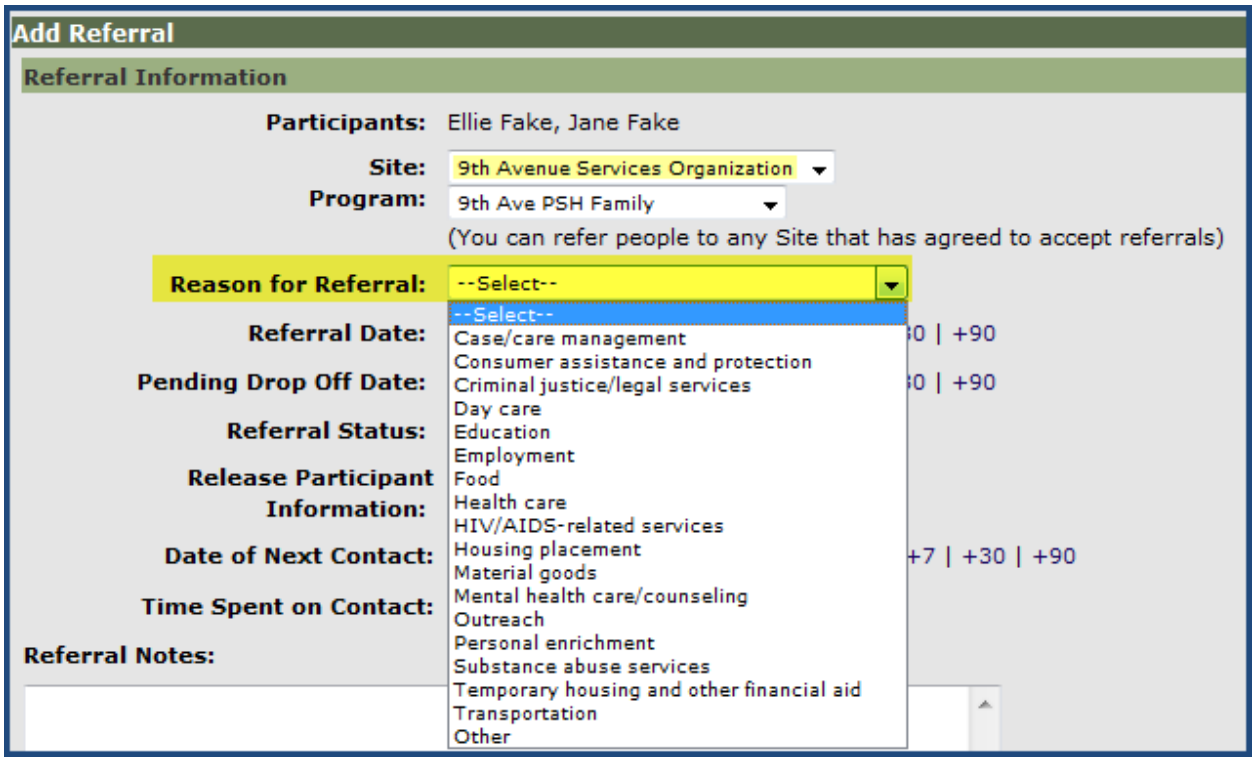
Step 2 – In the **Site** drop down, select the site (agency) you wish to make the referral. In the example below we have used **to Site** as the example. The process is similar for any of the choices.



Step 3 – Once you select a site, a **Program** drop box will appear. Select the program that you want the client referred to.

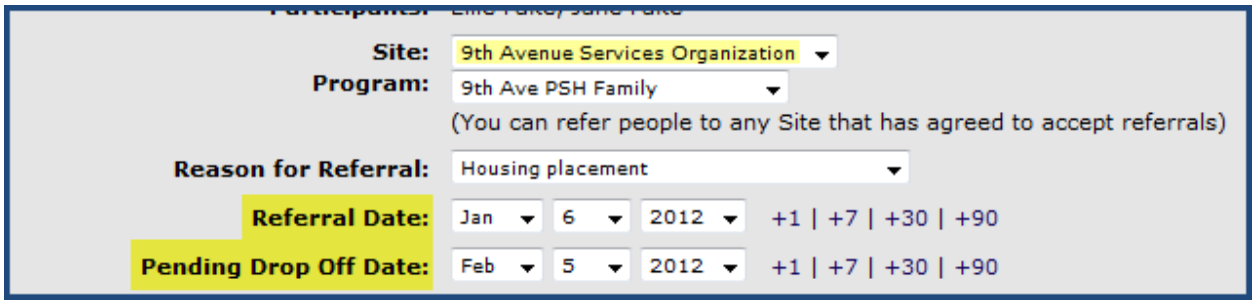


Step 4 – In the **Reason for Referral** drop down, select the reason for this referral.

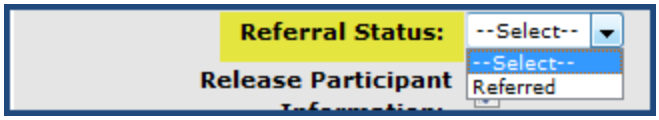


Step 5 – Referral Date is defaulted to today's date, you may change the date to be in the past if needed.

Pending Drop Off Date is only used for referrals **To Site or To Program.** When a referral is made **To Site** or **To Program**, it places the participants on that program's **Pending Referral List**. The **Pending Drop Off Date** is your way of determining how long the referral stays on that list before dropping off. The date defaults to 30 days from Today's Date. It can be changed if needed.



Step 6 – The **Referral Status** drop down list will be defined by your ETO Administrator. Select the status that applies.



Step 7 – By default, the checkbox for **Release of Participant Information** is checked. This indicates if you needed a release for the referral. This can be unchecked.

Date of Next Contact – If you want to follow up with the participants to make sure they followed through on the referral, you can enter a date that will show the referral on your **To Do List**.

Time Spent on Contact – If you would like to record the amount of time you spend on this referral, enter the time in minutes. This information will appear on **Review Staff Efforts**.

Referral Notes – Notes may be added. They will appear on the printed referral as well as on the View Pending Referral screen.

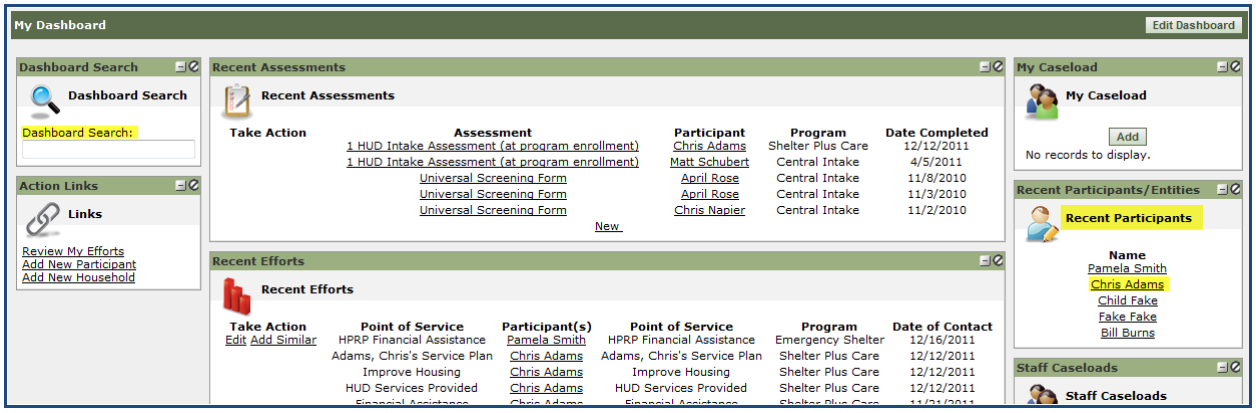
Dismiss From Program – IF you are no longer going to serve the participant(s) in this program, you may Dismiss them at the same time you refer them elsewhere for services.

When you have finished the referral, click **Submit and click Ok.**

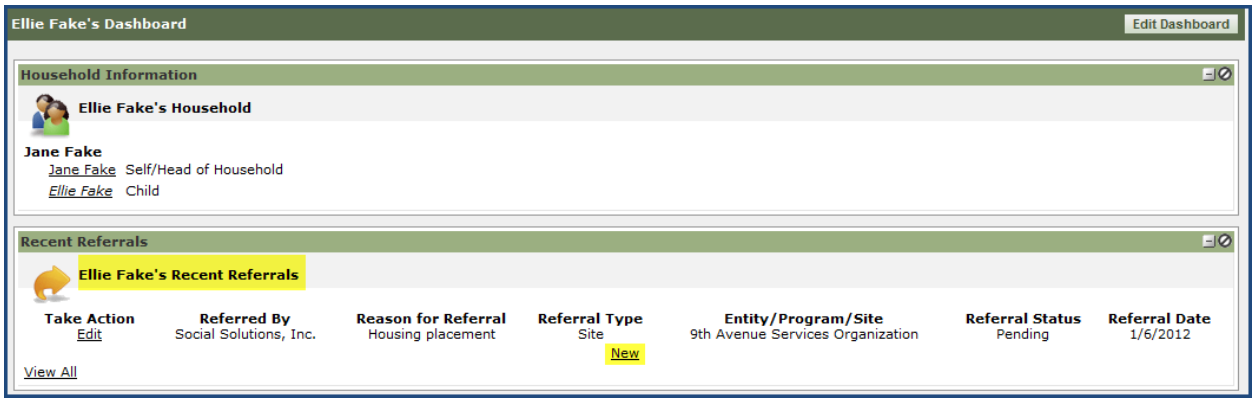
Step 8 – A printable version of the referral will appear. You may click the **Printer Icon** to print, **or Add Another Referral** if desired.

Add a Participant Referral from the Participant Dashboard

Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – Once you are on the Dashboard for your participant. Click the **New** link within the **Recent Referrals** section.



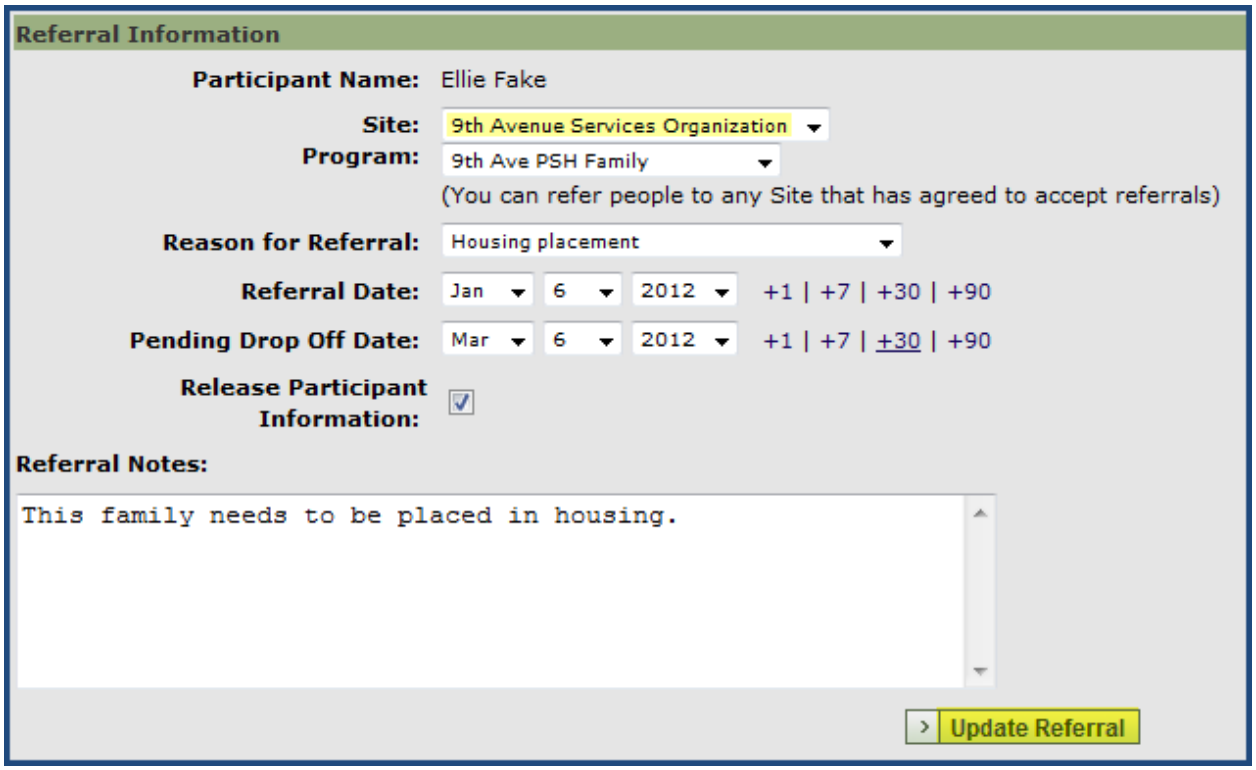
Step 3 – Follow the **Referral Steps 1 – 8**.

Editing Referrals

We recommend that you edit the Referrals from the Participant's Dashboard.

Step 1 – Under **Take Action** of the **Recent Referrals** section, click **Edit**.

Step 2 – Make any necessary Edits and click Update Referral.

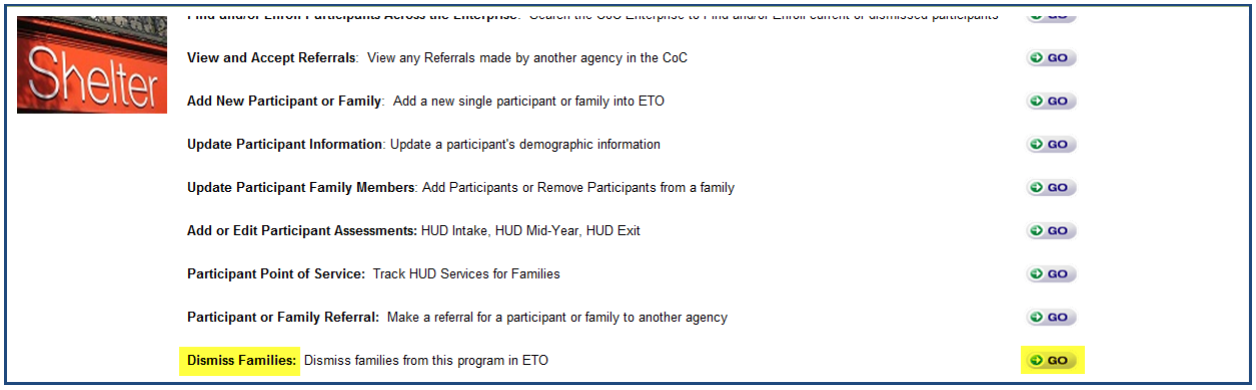

Referral Information
Participant Name: Ellie Fake
Site: 9th Avenue Services Organization
Program: 9th Ave PSH Family
(You can refer people to any Site that has agreed to accept referrals)
Reason for Referral: Housing placement
Referral Date: Jan 6 2012 +1 | +7 | +30 | +90
Pending Drop Off Date: Mar 6 2012 +1 | +7 | +30 | +90
Release Participant Information:
Referral Notes:
This family needs to be placed in housing.
Update Referral

Dismissing Inactive Families or Clients

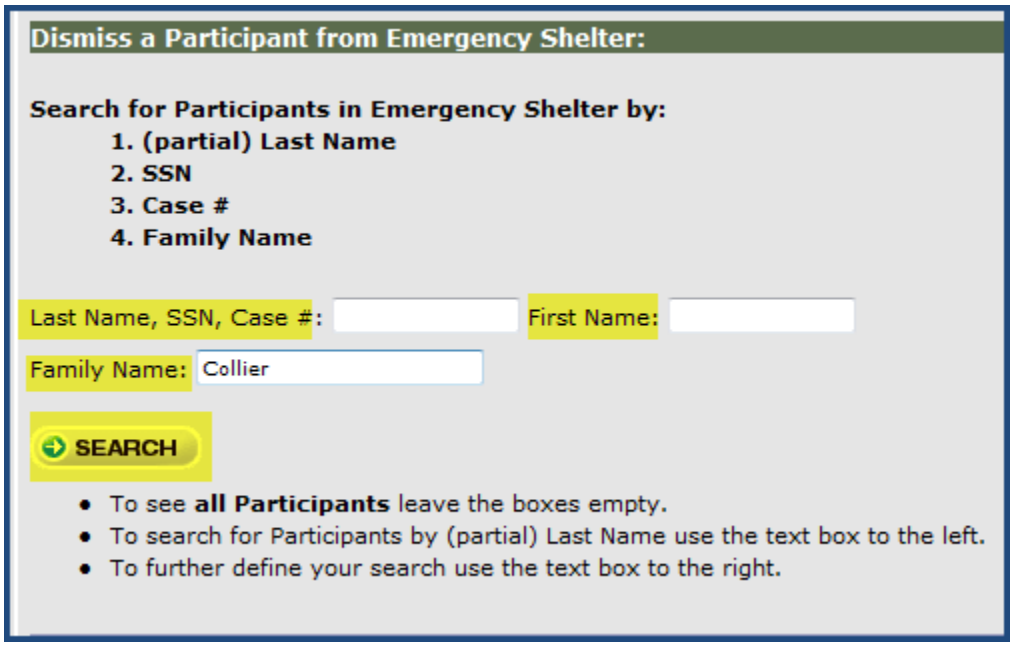
When a family or a client are no longer being served in a program they should be dismissed or made inactive. This can be done from the Homepage or the Participant Dashboard. **Please note that you can dismiss families and clients from the Homepage but only single participants can be dismissed using the Participant Dashboard.**

Dismissing from the Homepage

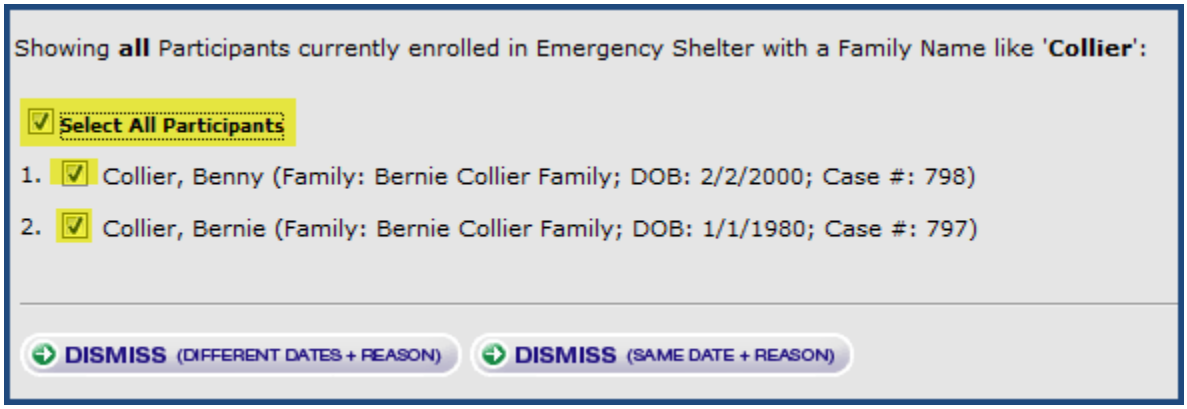
Step 1 – Click the **Go** button for Dismiss Families.



Step 2 – Enter search criteria for the client or family that should be dismissed. For **single clients** you can search by **Last Name, SSN, Case # and First Name**. For **Families** you should search by **Family Name**. If you leave all fields blank and search you will get a list of all active participants in the program. Once your search criteria is entered, click **Search**.



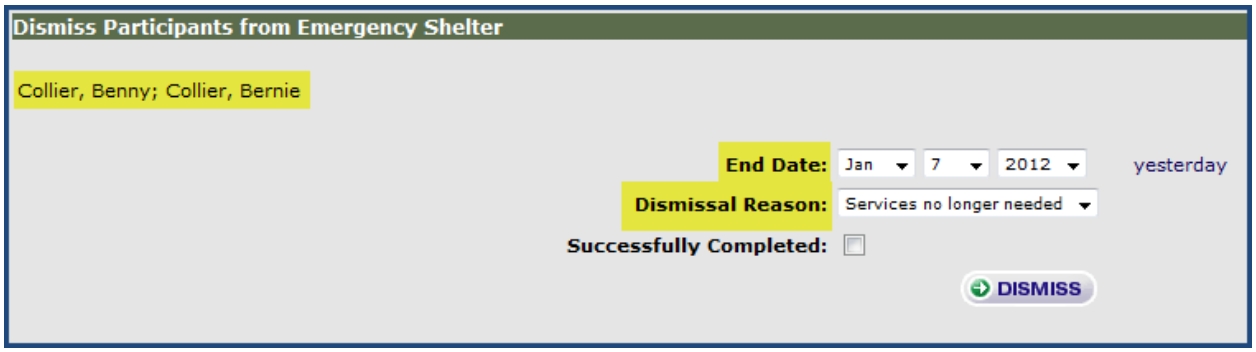
Step 3 – Click the checkbox for those you wish to dismiss. If you would like to dismiss all participants or family members, click the **Select All Participants** box.



Step 4 - At the bottom of the screen you will see two buttons: **Dismiss (Different Dates +Reason)** and **Dismiss (Same Date + Reason)**.

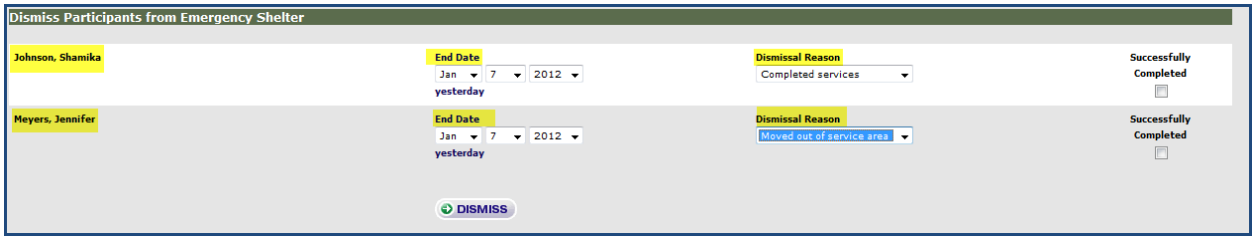
Dismiss (Same Date + Reason) – Use this if you are dismissing multiple people on the same date for the same reason.

In this example we are dismissing the Collier Family of Benny and Bernie on the same date for the same reason.

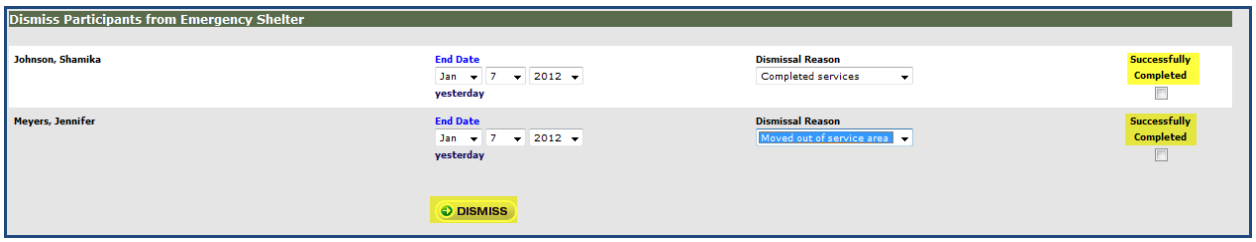


Dismiss (Different Dates +Reason) – Use this if you are dismissing multiple people on different dates or for different reasons.

In this example we are dismissing two people on the same date but for different reasons.

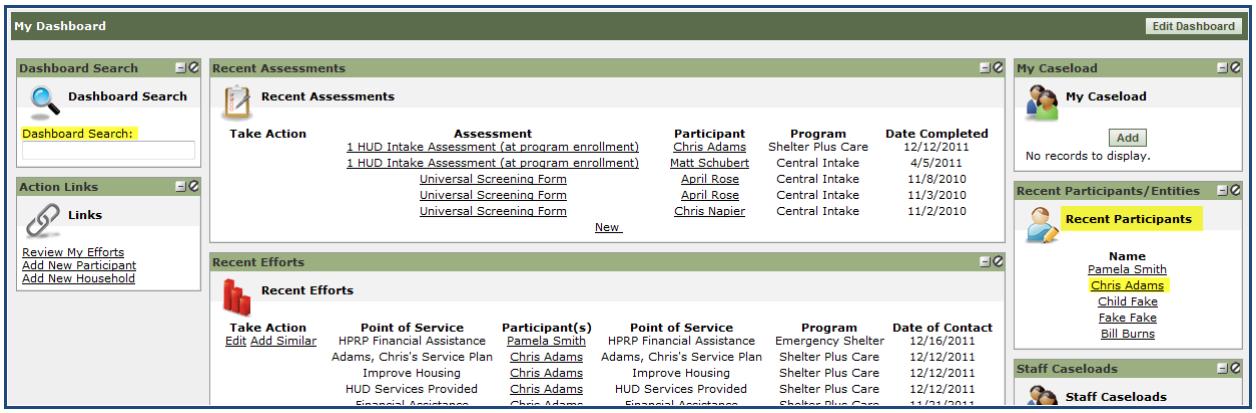


Step 5 – If the family or client successfully completes your program, you can click the **Successfully Completed** box. Click **Dismiss** when completed.

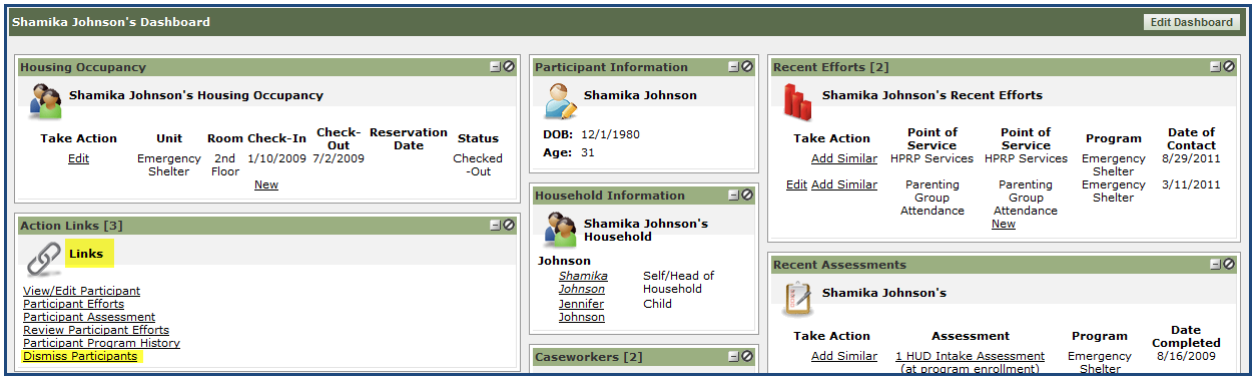


Dismissing from Participant Dashboard

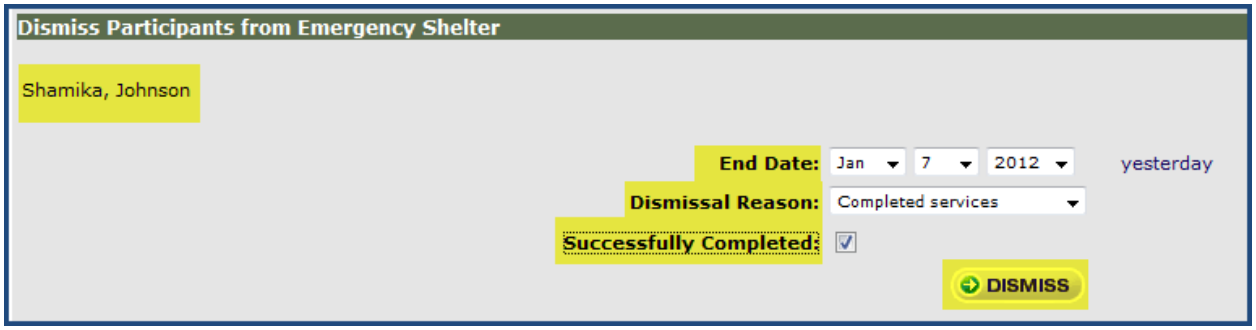
Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – In the **Actions Links** section, click **Dismiss Participants.**



Step 3 – Enter the correct **End Date** and Select a **Dismissal Reason**. If the participant has successfully completed the program, click **Successfully Completed**. When finished, click **Dismiss**.


Dismiss Participants from Emergency Shelter
Shamika, Johnson
End Date:
Jan
7
2012
yesterday
Dismissal Reason:
Completed services
Successfully Completed:
DISMISS

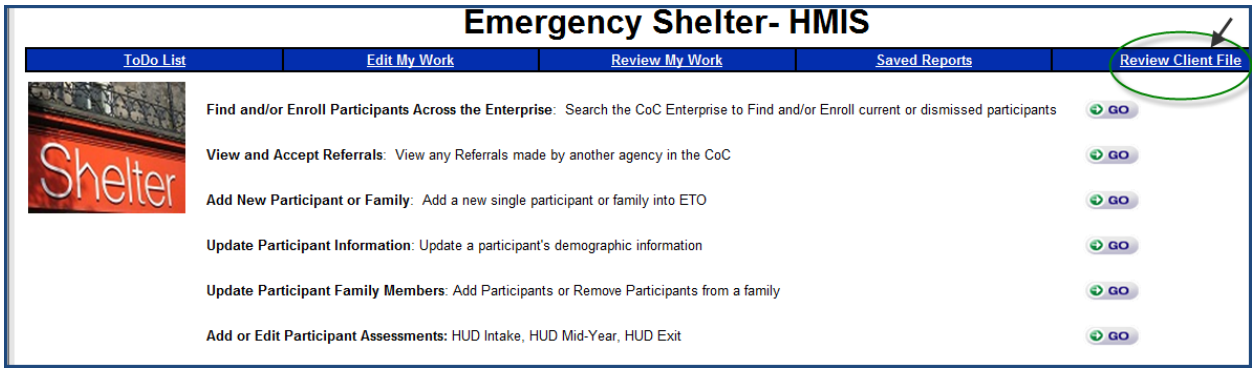
Review Participant Efforts

This great feature provides staff a viewable and printable record of data entered by a selected participants including: HUD Assessments, HUD Referrals and HUD Services. This report provides a compelling record of your organization's efforts towards meeting outcomes for individual Participants. In addition, it is a very effective method of communication between different staff working with the same Participant.

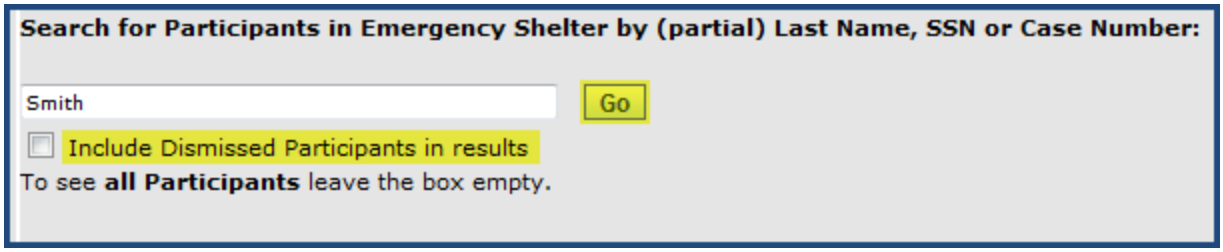
As with other ETO functionality you can use the Homepage or the Participant's Dashboard.

Homepage

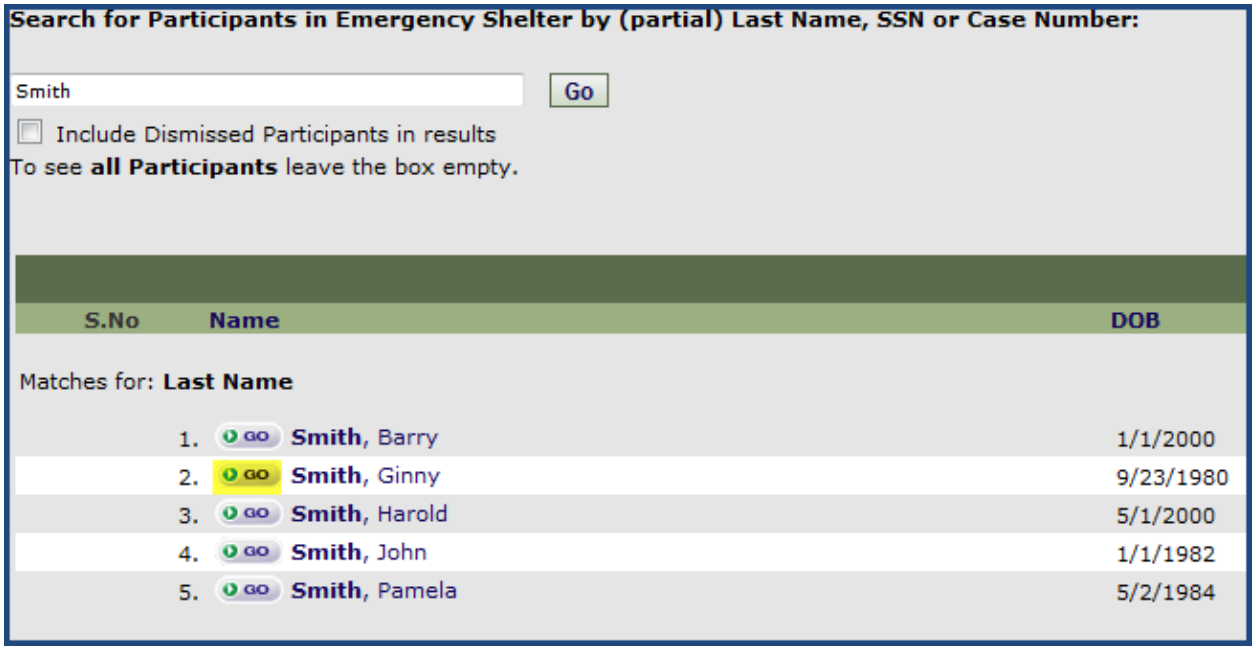
Step 1 - Select the **Review Client File** option in the upper right hand corner.



Step 2 - Search for a participant by full or partial Last name, SSN or Case Number and click **Go**. If you leave the search criteria blank and click **Go**, you will get a list of all active clients in the program. If you are searching for a client who was dismissed, click the Include **Dismissed Participants in Results** box.

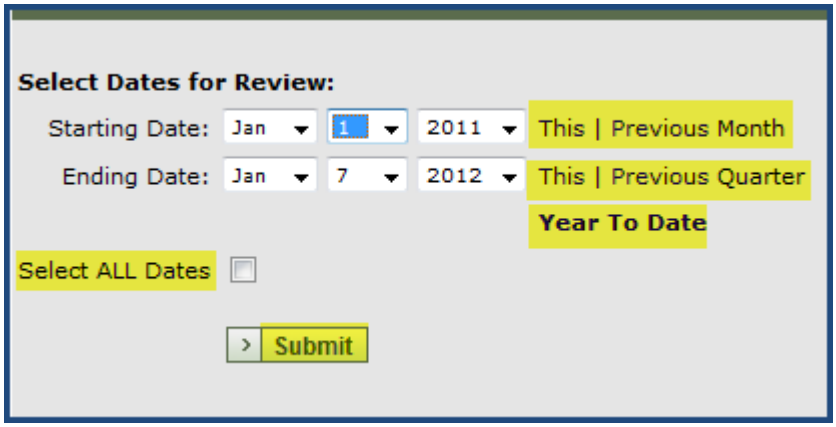


Step 3 – Find the client you want to review and click the **Go** button next to their name.



Step 4 – Enter the Date Range that you would like to review. If you would like to view the client's history for This month or Previous Month, click **This / Previous Month**. To view the history for a quarter, click **This / Previous Quarter**. You can also click the **Year To Date** to view a client's entire yearly history. If you would like to see anything the client has ever done, click the **Select ALL Dates** box.

You may also manually enter any date range. Click **Submit** when ready.



Step 5 – This review screen is broken up into 3 parts: **Participant Information**, **Overall Statistics** and **Detailed Statistics**.

Participant Information

This is where you can view the participant's Name, Case Number, Site Name, Report Period and the current Programs.

Participant Information	
Participant:	Smith, Ginny
Case Number:	674
Site:	HMIS Demonstration Site
Period:	01/01/2011 - 01/07/2012
Program(s):	Emergency Shelter

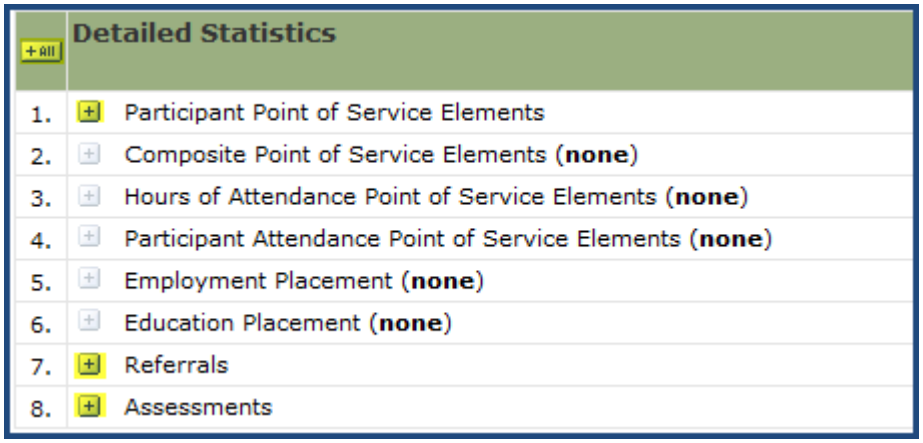
Overall Statistics

This section provides a quick glance at what a client has been doing. In this example we can see the client has been working on 4 Services. The case worker or staff met with the client 5 times for 4 different types of Services. 1 Referral was made and the client completed 2 Assessments.

Overall Statistics	
Number of Point of Service Elements:	4
Number of Efforts:	5
Total Time Spent (hh:mm):	01:45
Attendance:	0
Total Events Attended:	0
Total Events Scheduled:	0
Total Time Spent (hh:mm) (If applicable):	00:00
Attendance %:	N/A
Employment Placements:	0
Education Placements:	0
Attached Processes:	0
Referrals:	1
Total Time Spent on Referrals (hh:mm):	00:00
Assessments:	2

Detailed Statistics

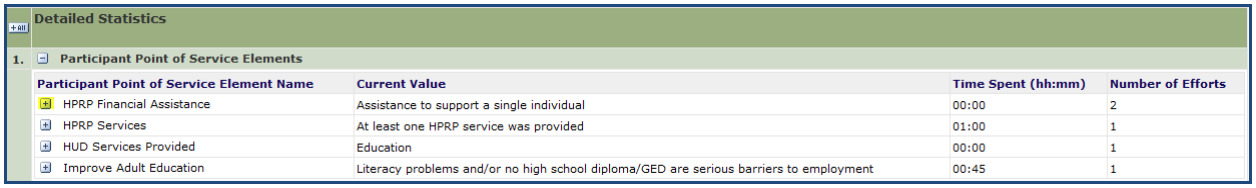
Step 1 - You can see all the details about this client's services. In the example below, you can see **+** next to Participant Point of Service Elements, Referrals**,** and Assessments. Click the **+** to see the details. If you want to see all details, click +All.



	Detailed Statistics
1.	Participant Point of Service Elements
2.	Composite Point of Service Elements (**none**)
3.	Hours of Attendance Point of Service Elements (**none**)
4.	Participant Attendance Point of Service Elements (**none**)
5.	Employment Placement (**none**)
6.	Education Placement (**none**)
7.	Referrals
8.	Assessments

Step 2 – In this example you can see that she has worked on four (4) Services: HPRP Financial Assistance, HPRP Services, HUD Services Provided, and Improve Adult Education. You can see the current value that has been entered for her, the time spent with her, and the number of times you met with her on that particular service.

Again, click the **+** next to a service to see more details.

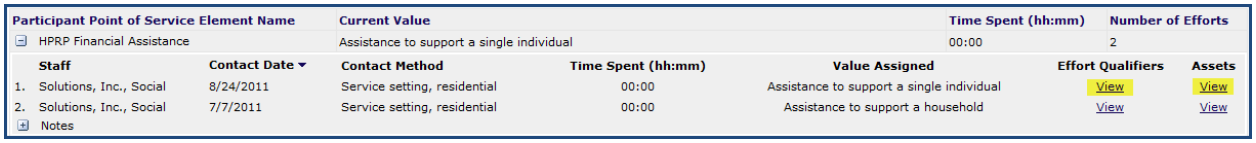


Detailed Statistics

1. Participant Point of Service Elements

Participant Point of Service Element Name	Current Value	Time Spent (hh:mm)	Number of Efforts
HPRP Financial Assistance	Assistance to support a single individual	00:00	2
HPRP Services	At least one HPRP service was provided	01:00	1
HUD Services Provided	Education	00:00	1
Improve Adult Education	Literacy problems and/or no high school diploma/GED are serious barriers to employment	00:45	1

Step 3 – Now you will see which **staff** met with her, **Contact Date**, **Contact Method**, **Time Spent,** and the **Value Assigned**. In this example you will also see **View** under **Effort Qualifiers** and **Assets**. Click the **View** links.



Participant Point of Service Element Name	Current Value	Time Spent (hh:mm)	Number of Efforts
HPRP Financial Assistance	Assistance to support a single individual	00:00	2

	Staff	Contact Date	Contact Method	Time Spent (hh:mm)	Value Assigned	Effort Qualifiers	Assets
1.	Solutions, Inc., Social	8/24/2011	Service setting, residential	00:00	Assistance to support a single individual	View	View
2.	Solutions, Inc., Social	7/7/2011	Service setting, residential	00:00	Assistance to support a household	View	View

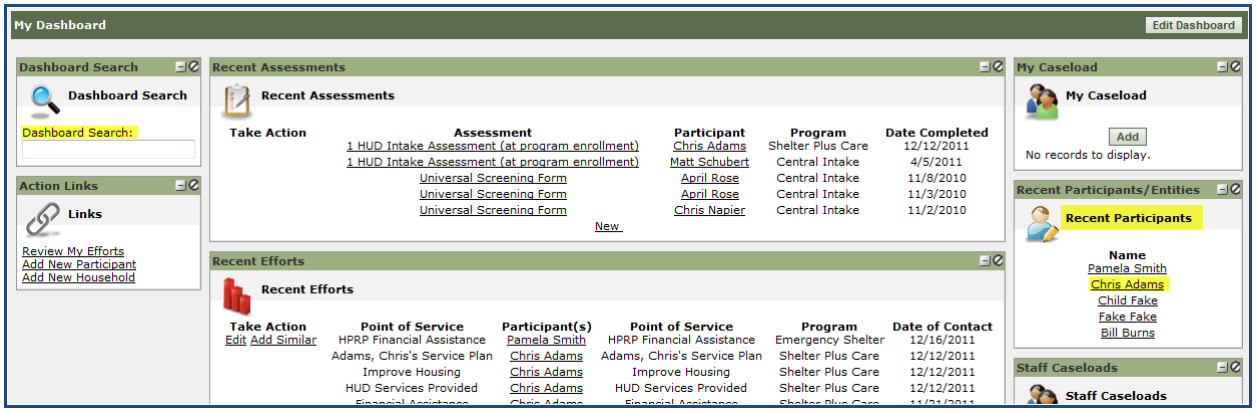
Notes

Now you can see the Start and End Dates for the Financial Assistance and the Number of Months the Assistance Applies to as well as the Funds Disbursement Information.

Step 4 – If any Notes were written by the case worker providing the service, you can view them by clicking the **+** next to Notes.

Review Participant Efforts from My Dashboard

Step 1 – Click the Tab for **My Dashboard**. If the participant you wish to update is not listed in your **Recent Participants** list, then use the **Dashboard Search** to find them.



Step 2 – In the **Action Links** section, click **Review Participant Efforts**. Follow the steps above for Homepage to view the report.

Reporting

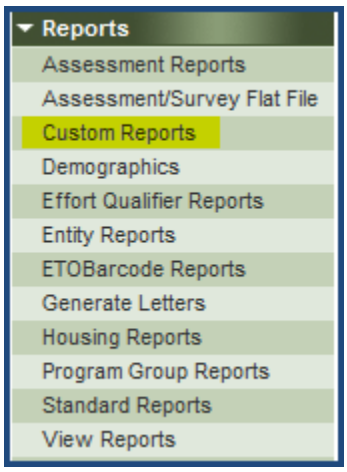
ETO produces required HMIS Reports for the CSV 3.02 Exports and Imports, QPR, APR, HPRP APR and the AHAR.

CSV 3.02 Exports

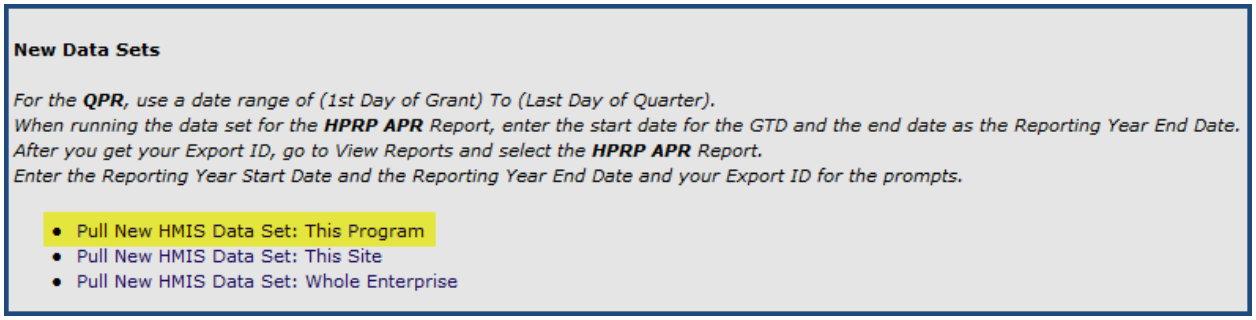
ETO produces the .CSV 3.02 exports as defined by HUD HMIS. The files created are:

Export, AgencyProgram, ProgramParticipation, Client, IncomeBenefit, ServiceEvent, Export, Site Information, and BedInventory.

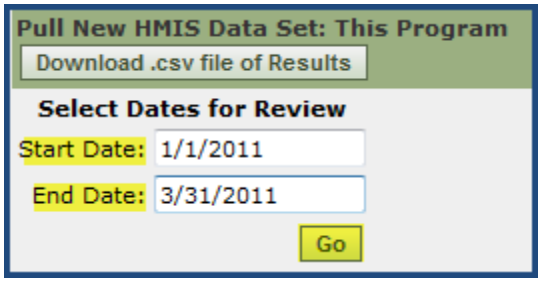
Step 1 – Open the Reports Menu from the ETO Navigation Bar and select Custom Reports.



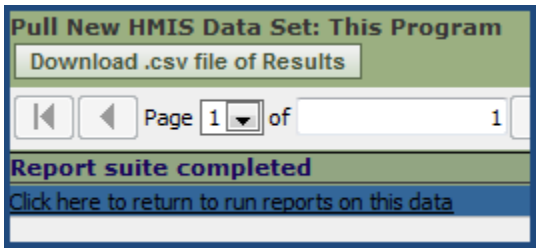
Step 2 – In order to run an export file, the user must select the data source for their data set to run. The choices in ETO are: This Site, Program Group or This Program. An Enterprise Manage will also have the choice to run the data set for their entire Enterprise. There is also a link to review archived data sets. Click the choice under the **New HPRP Data Sets.**



Step 3 – Enter a Start Date and an End Date for the Data Set and click Go.



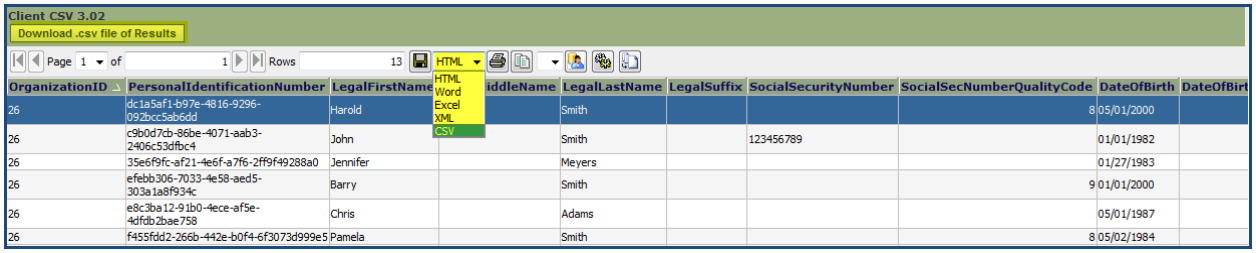
Step 4 – After a few moments (longer if running a large date range) the following link shaded in blue, **Click here to return to run reports on this data**, will appear. Click on that blue link. This will take you back to the Custom Reports Page. If this link does not appear, it means the data pull timed out. If this happens, try to running the data set again. If it still doesn't run please contact Customer Support and they will run the data set for you.



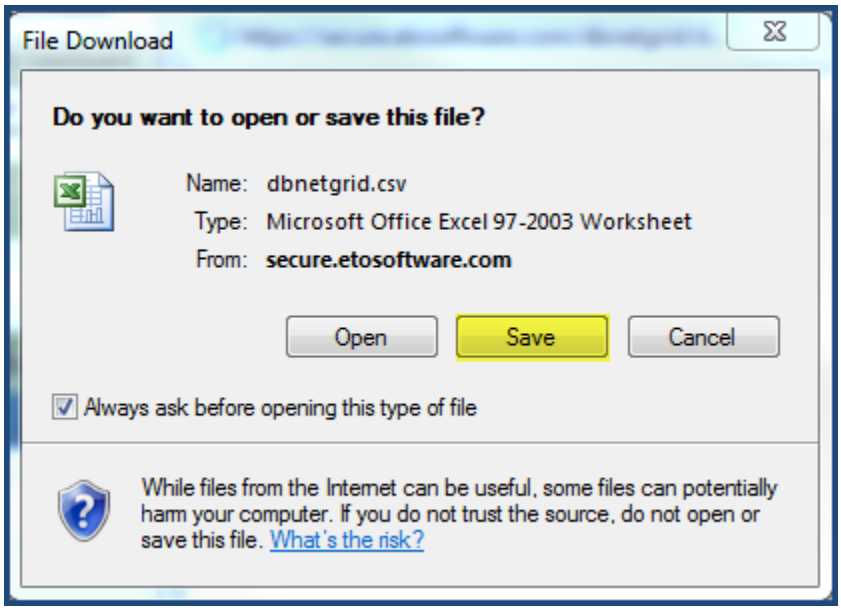
Step 5 – Scroll down to the on the page until finding the data set that was created. The title will give the name of the program, program group or site and the start and end dates entered. It will also show the person who ran the data sent and the date and time it was run. After the title there is an Export ID. This Export ID is important as you will need to remember that ID when running an APR, HPRP APR or AHAR report.

Step 6 – Under the title for the export a list of export files will be listed. The first set of files are the export files and export readable files. HUD uses standard codes for the exports, but customers found it difficult to check the files for accuracy due to the coding. ETO also provides readable files so accuracy can be easily checked. Click on a file to open it.

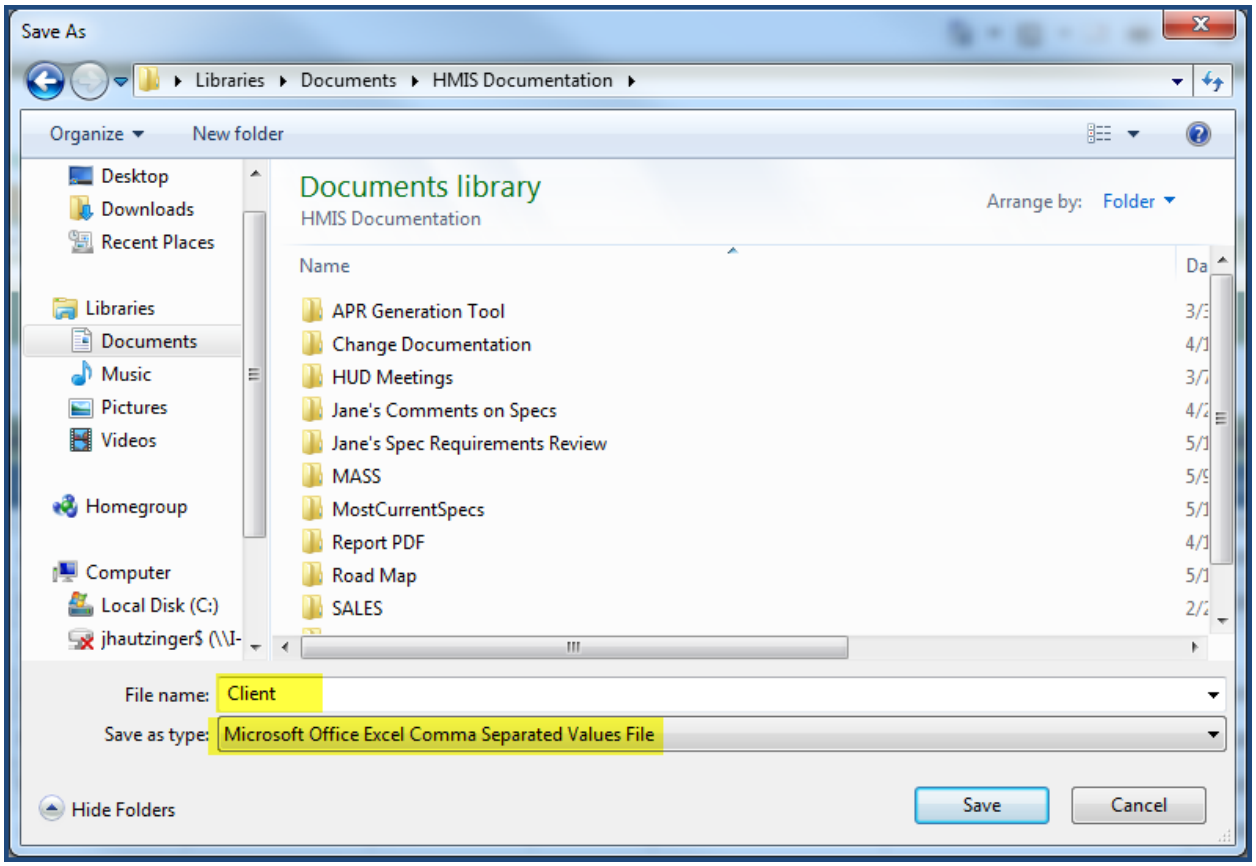
Step 7 – This is a Client CSV 3.02 file that can be sent to the CoC for import. (If your organization is on the ETO Enterprise with your CoC, this file will not need to be exported.) To export the file, change the file type to CSV and click the Save Icon. You may also click the Download .csv file of Results button to save your export file.



Step 8 – A file download message will appear to open or save this file. Click to Save.



Step 9 – Browse to where the export should be saved. **Name of export the correct HUD approved csv name as listed above.** Make sure the type of file is the Microsoft Office Excel Comma Separated Values (.csv) File and click Save.



Step 10 – This process will need to be followed to export and save all of the export files. The Data Set also has the following files: HMIS_QPR Raw Data, Data Entry Errors, Financial Assistance Summary and Missing Universal Elements. These files assist users with data quality evaluation.

- HMIS_QPR Raw Data
- Data Entry Errors
- QPR
- Financial Assistance Summary
- Missing Universal Elements

QPR

The QPR is also run by creating a Data Set within the Custom Reports page.

Step 1 - In order to run the QPR, enter the **Start Date as the Date the funding time period started. The end date will be the last date of the quarter being reported.**

New Data Sets

*For the **QPR**, use a date range of (1st Day of Grant) To (Last Day of Quarter).*
*When running the data set for the **HPRP APR** Report, enter the start date for the GTD and the end date as the Reporting Year End Date.*
*After you get your Export ID, go to View Reports and select the **HPRP APR** Report.*
Enter the Reporting Year Start Date and the Reporting Year End Date and your Export ID for the prompts.

- Pull New HMIS Data Set: This Program
- Pull New HMIS Data Set: This Site
- Pull New HMIS Data Set: Whole Enterprise

Step 2 – Once the Data Set is created, click the QPR from the list.

- HMIS_QPR Raw Data
- Data Entry Errors
- QPR
- Financial Assistance Summary
- Missing Universal Elements

Step 3 – The QPR runs in Crystal Reports. The first page of the report is the data for Total Persons and Households Served and Total Persons and Households Served by Service Provided.

A client falls under the categories of Homelessness Prevention or Homeless Assistance based on Housing Status entered into the Client HUD Assessments.

The Q Columns contain the numbers for the Quarter (based on the End Date entered for the Data Set). The GTD Columns are for the numbers in the Grant to Date (based on the Start Date entered for the Data Set).

The report is also broken down by Persons and Households and Type of Service (Financial Assistance or Housing Relocation & Stabilization Services).

QPR report for Emergency Shelter Program

GTD columns include data from 01/01/2011 to 03/31/2011

1. Total Persons and Households Served	Homelessness Prevention				Homeless Assistance				TOTAL			
	Persons		Households		Persons		Households		Persons		Households	
	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD
Total Served	0	0	0	0	2	2	1	1	2	2	1	1

2. Total Persons and Households Served by Service Provided	Homelessness Prevention				Homeless Assistance				TOTAL			
	Persons		Households		Persons		Households		Persons		Households	
	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD
Financial Assistance												
Rental Assistance	0	0	0	0	2	2	1	1	2	2	1	1
Security and Utility Deposits	0	0	0	0	0	0	0	0	0	0	0	0
Utility Payment	0	0	0	0	0	0	0	0	0	0	0	0
Moving Cost Assistance	0	0	0	0	0	0	0	0	0	0	0	0
Motel and Hotel Vouchers	0	0	0	0	0	0	0	0	0	0	0	0
Total-Financial Assistance	0	0	0	0	2	2	1	1	2	2	1	1
Housing Relocation & Stabilization Services												
Case Management	0	0	0	0	2	2	1	1	2	2	1	1
Outreach and Engagement	0	0	0	0	0	0	0	0	0	0	0	0
Housing Search and Placement	0	0	0	0	0	0	0	0	0	0	0	0
Legal Services	0	0	0	0	0	0	0	0	0	0	0	0
Credit Repair	0	0	0	0	0	0	0	0	0	0	0	0
Total-Housing Relocation & Stabilization Services	0	0	0	0	2	2	1	1	2	2	1	1

*Click on bold or italic values on the left for details

Step 4 – To get additional information on the numbers, there is a drill down that can be applied by clicking the number in the report.

QPR report for Emergency Shelter Program

GTD columns include data from 01/01/2011 to 03/31/2011

1. Total Persons and Households Served	Homelessness Prevention				Homeless Assistance				TOTAL			
	Persons		Households		Persons		Households		Persons		Households	
	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD
Total Served	0	0	0	0	2	2	1	1	2	2	1	1

2. Total Persons and Households Served by Service Provided	Homelessness Prevention				Homeless Assistance				TOTAL			
	Persons		Households		Persons		Households		Persons		Households	
	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD	Q	GTD
Financial Assistance												
Rental Assistance	0	0	0	0	2	2	1	1	2	2	1	1
Security and Utility Deposits	0	0	0	0	0	0	0	0	0	0	0	0
Utility Payment	0	0	0	0	0	0	0	0	0	0	0	0
Moving Cost Assistance	0	0	0	0	0	0	0	0	0	0	0	0
Motel and Hotel Vouchers	0	0	0	0	0	0	0	0	0	0	0	0
Total-Financial Assistance	0	0	0	0	2	2	1	1	2	2	1	1
Housing Relocation & Stabilization Services												
Case Management	0	0	0	0	2	2	1	1	2	2	1	1
Outreach and Engagement	0	0	0	0	0	0	0	0	0	0	0	0
Housing Search and Placement	0	0	0	0	0	0	0	0	0	0	0	0
Legal Services	0	0	0	0	0	0	0	0	0	0	0	0
Credit Repair	0	0	0	0	0	0	0	0	0	0	0	0
Total-Housing Relocation & Stabilization Services	0	0	0	0	2	2	1	1	2	2	1	1

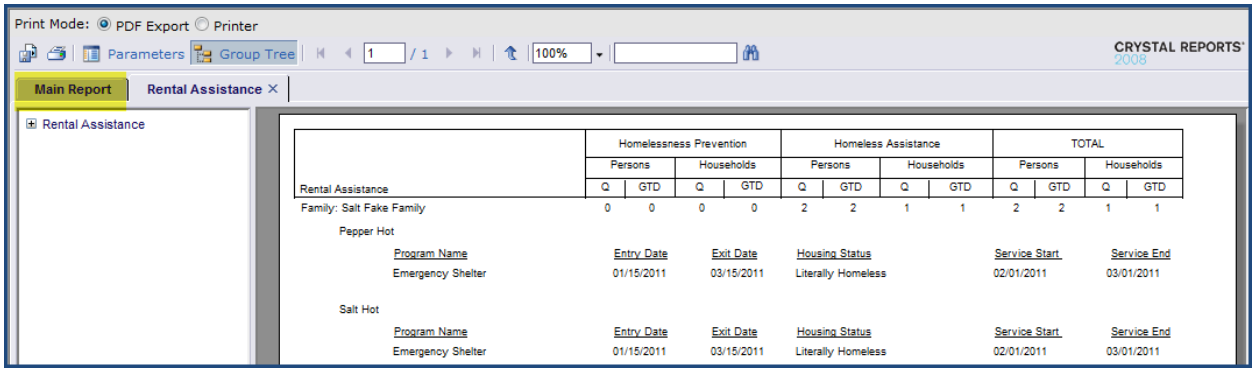
*Click on bold or italic values on the left for details

Step 5 – A breakdown of the report appears. In this example there is 1 Household – Salt Fake Family with 2 members in that family – Pepper Hot and Salt Hot. This family came into the Emergency Shelter Program on 1/15/11 and Exited the Program on 3/15/11. They had a Housing Status of Literally Homeless. Their Financial Assistance for Rent had a Service Start Date of 2/1/11 and a Service End Date of 3/1/11.

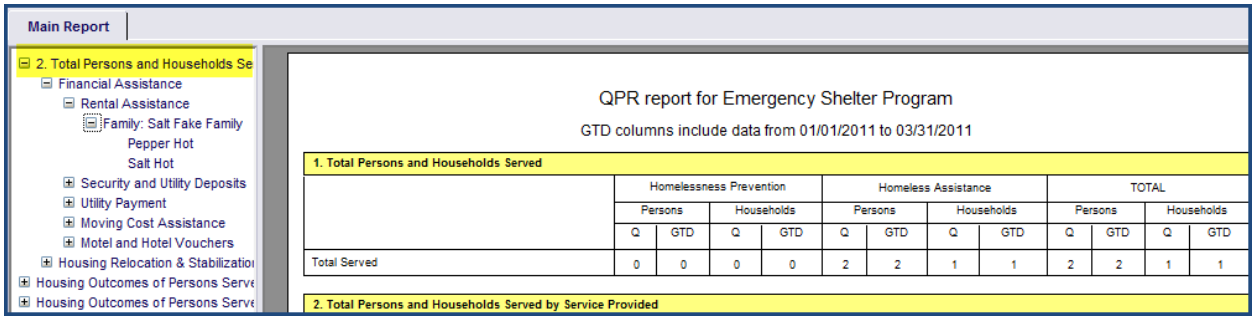
This is important to note: If a service is entered for one member of a family, the same service will automatically be applied to all members of that family who were **Active** at the time of Service. In this example, the Financial Assistance Point of Service was entered for Sale Hot, but it automatically was applied to Pepper Hot.

The Service Start Date and End Date are pulled from the Effort Qualifiers that are in the Financial Assistance Point of Service. Users must enter Start and End date for the data to appear in this report.

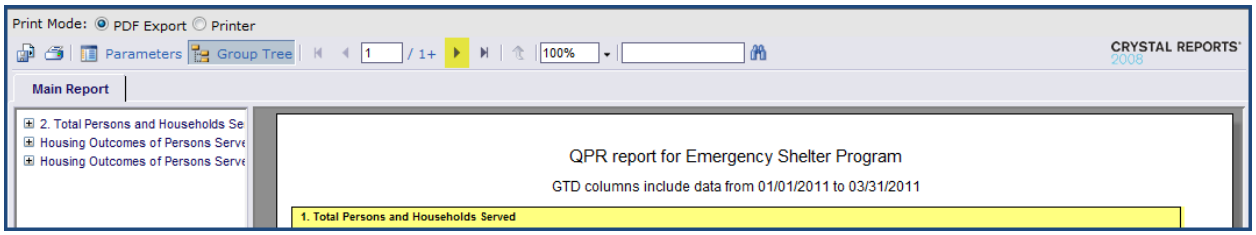
Step 6 – To go back to the Main Report from the Drilldown page, click the Main Report Tab at the top of the screen.



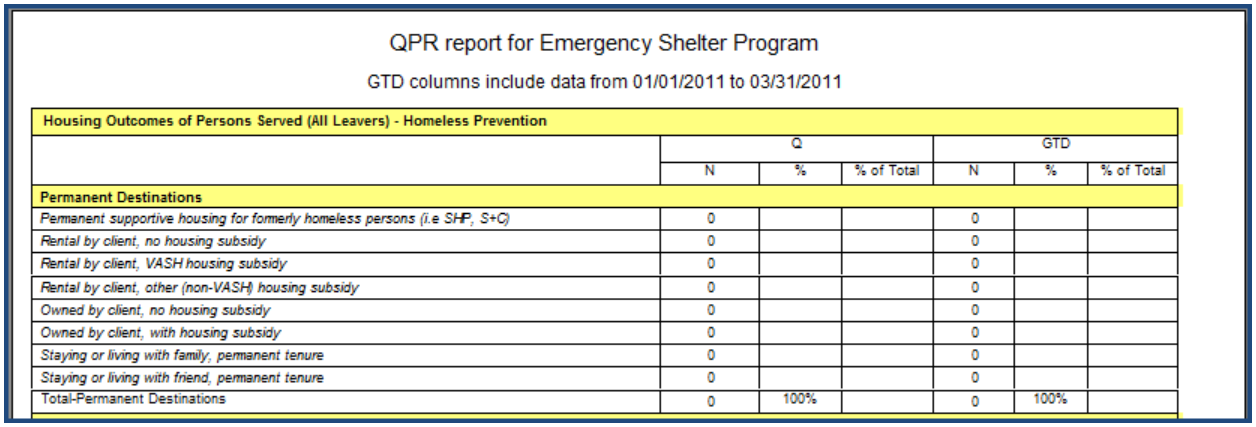
Step 7 – Report information can also be drilled down by using the menu tab on the left of the screen. Click the + of the information that more detail is needed.



Step 8 – Click the Page Arrow at the top of the screen to go to Page 2 of the QPR.



Step 9 – Page 2 is similar to Page 1 of the QPR but it is Exit Information for Destination. Again, if more information is needed, click the number to drill down into the report.

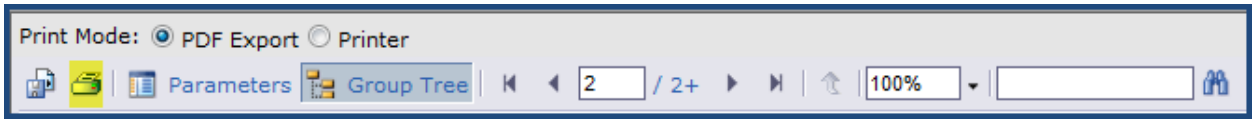


QPR report for Emergency Shelter Program

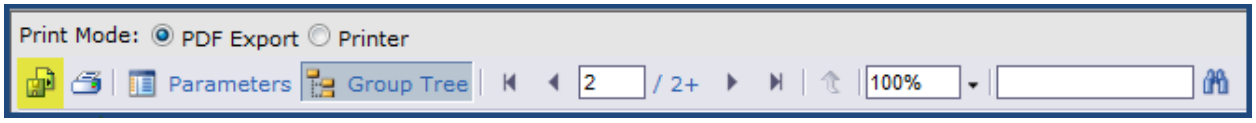
GTD columns include data from 01/01/2011 to 03/31/2011

Housing Outcomes of Persons Served (All Leavers) - Homeless Prevention						
	Q			GTD		
	N	%	% of Total	N	%	% of Total
Permanent Destinations						
Permanent supportive housing for formerly homeless persons (i.e SHP, S+C)	0			0		
Rental by client, no housing subsidy	0			0		
Rental by client, VASH housing subsidy	0			0		
Rental by client, other (non-VASH) housing subsidy	0			0		
Owned by client, no housing subsidy	0			0		
Owned by client, with housing subsidy	0			0		
Staying or living with family, permanent tenure	0			0		
Staying or living with friend, permanent tenure	0			0		
Total-Permanent Destinations	0	100%		0	100%	

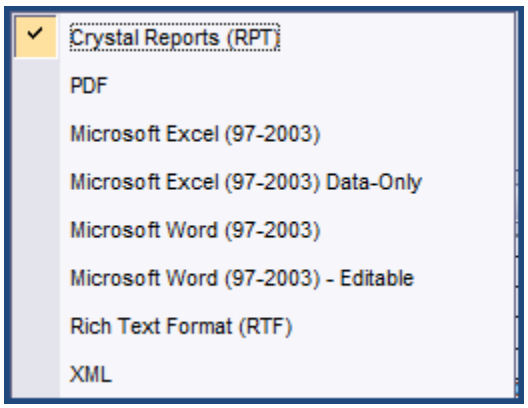
Step 10 – To print this report, click the Printer Icon at the top of the screen.



Step 11 – To Export this report, click the Export Icon at the top of the screen.



Step 12 – The Export Options are:

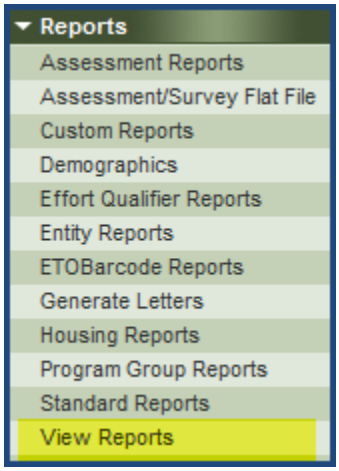


ETO Results (WEBI)

Before discussing the APR, HPRP APR and the AHAR Reports, you must understand some basic functions of running the ETO Results Reports.

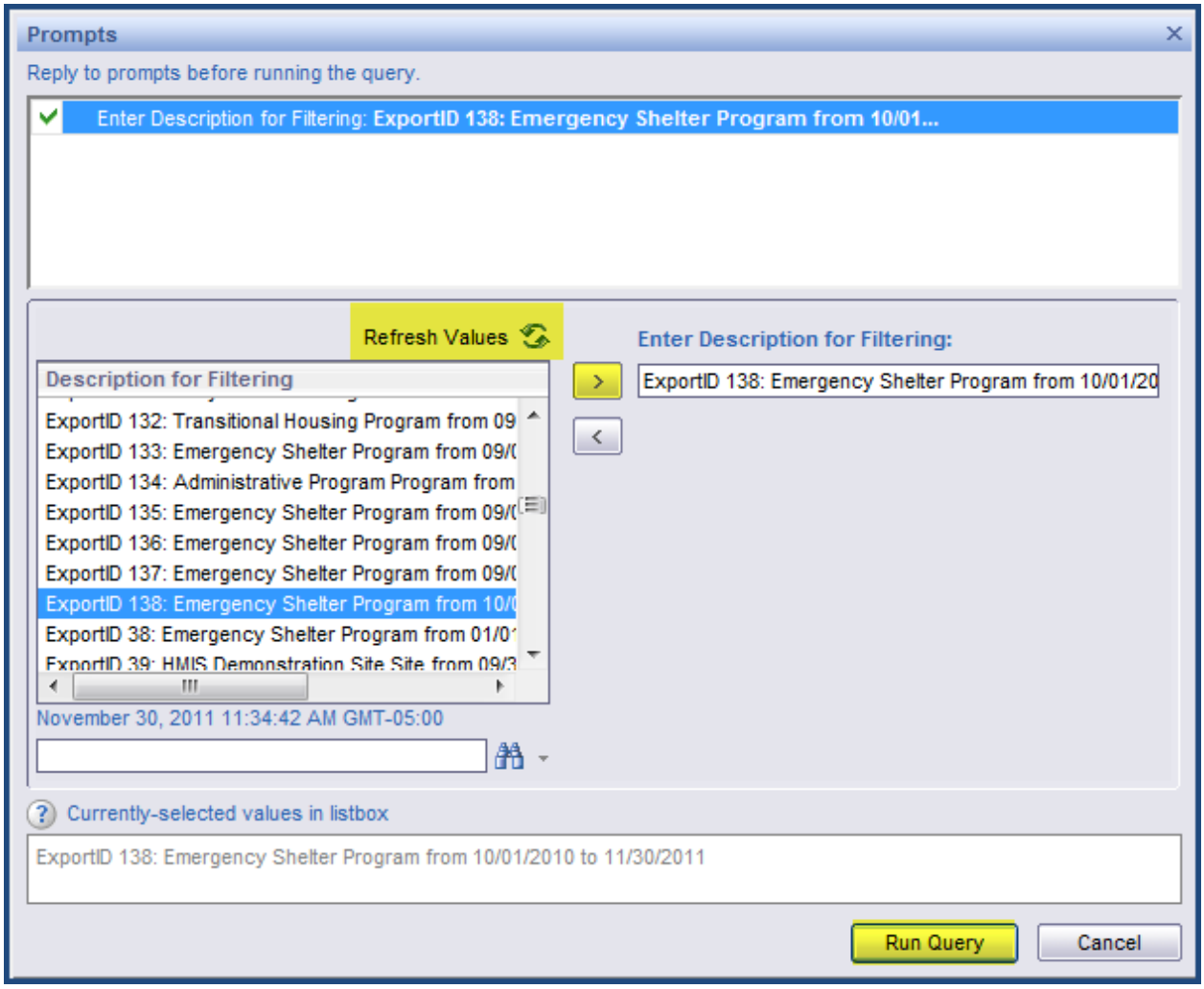
In order to run an ETO Results HMIS Report, you will need to run the Data Set from your Custom Reports Page to get your Export ID #.

Next you will go to Reports, then View Reports in your Navigation Bar



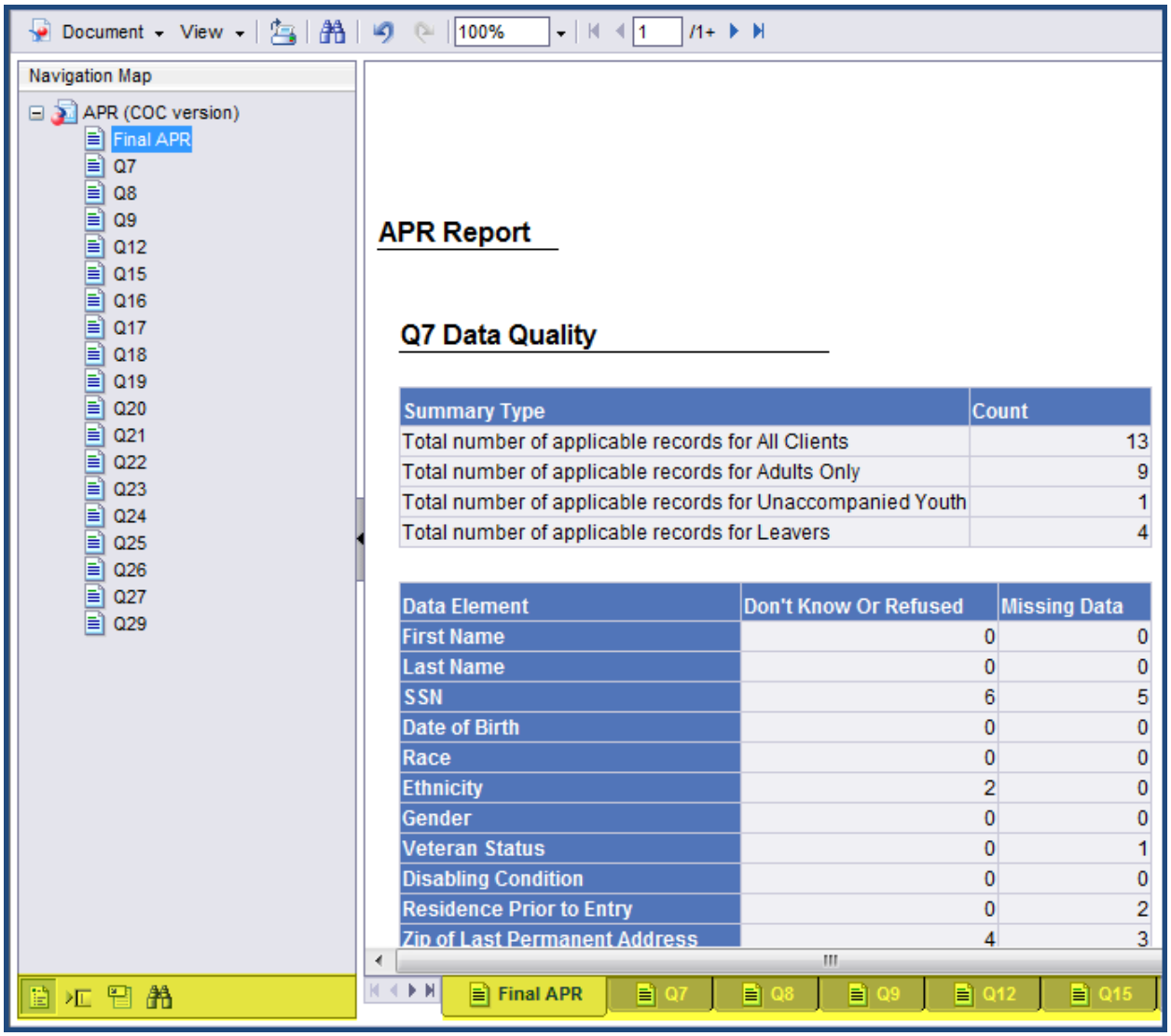
Select the report.

A Prompt will appear. In this example for running the APR (COC version), the prompt is for the Export ID. Click the Refresh Values to get a current list of Export ID's. Highlight the Export you wish to you and click the arrow to move the report to the right box. Click Run Query when finished.

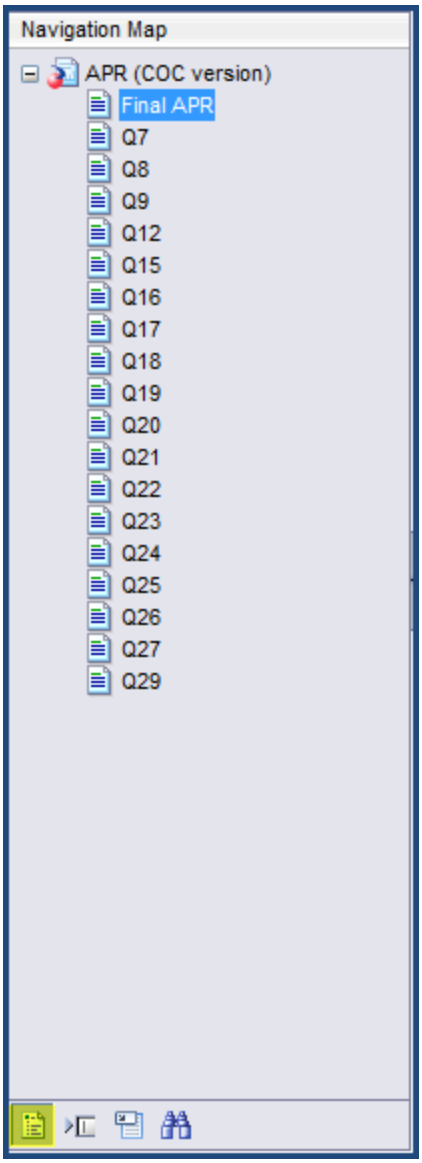


After the query runs, the report will appear with data. To the left of the report you will see a panel. At the bottom of the panel, you will see a series of buttons.

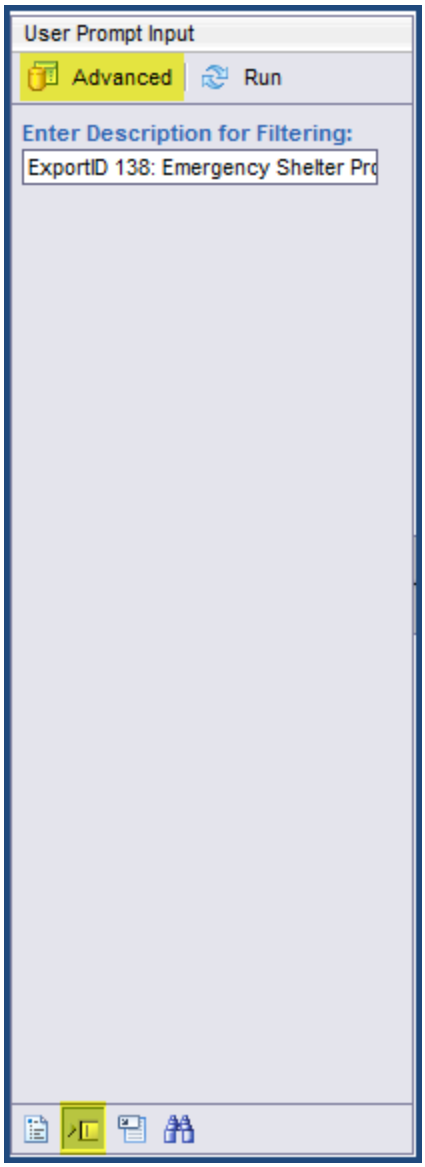
You will also see a series of Tabs at the bottom of the report. The first tab is always the whole report with only data and no raw data details. The rest of the tabs are specific to the question in the report and gives the raw data.



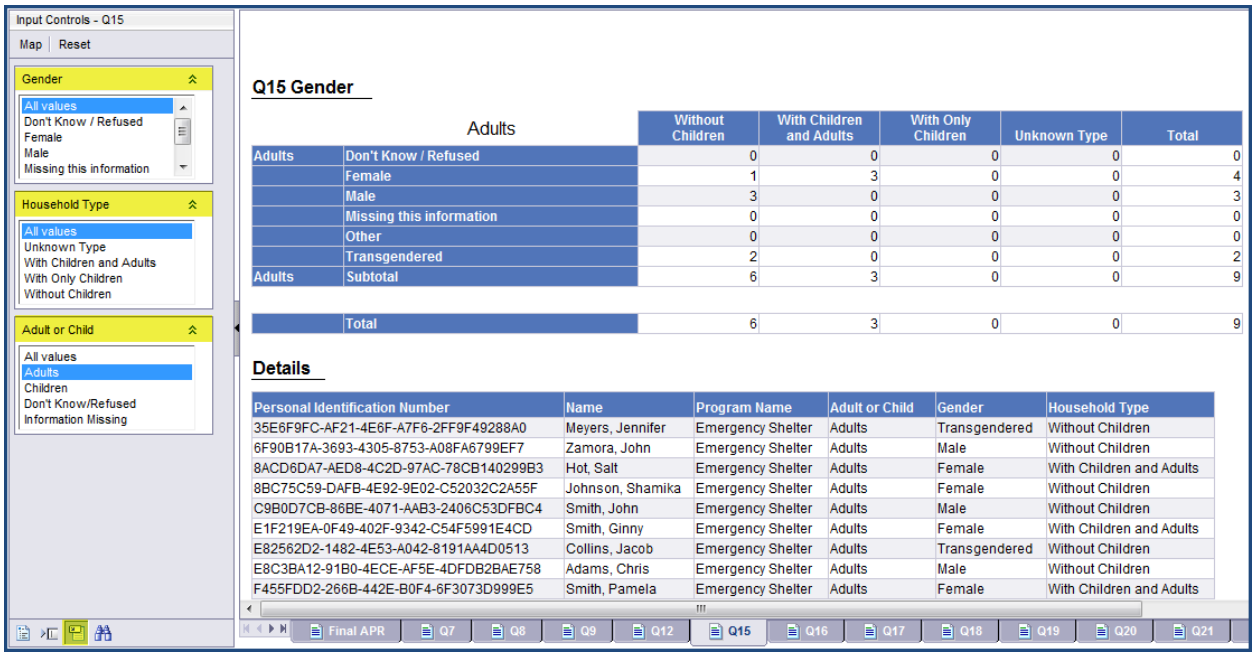
At the bottom of the left panel, the first button opens your Navigation Map. You can choose a report page from this map, or use your tabs below.



The next button is the User Prompt Input. When you are done working on the APR for this export, you can click the Advanced button at the top and select another export to run for the APR.



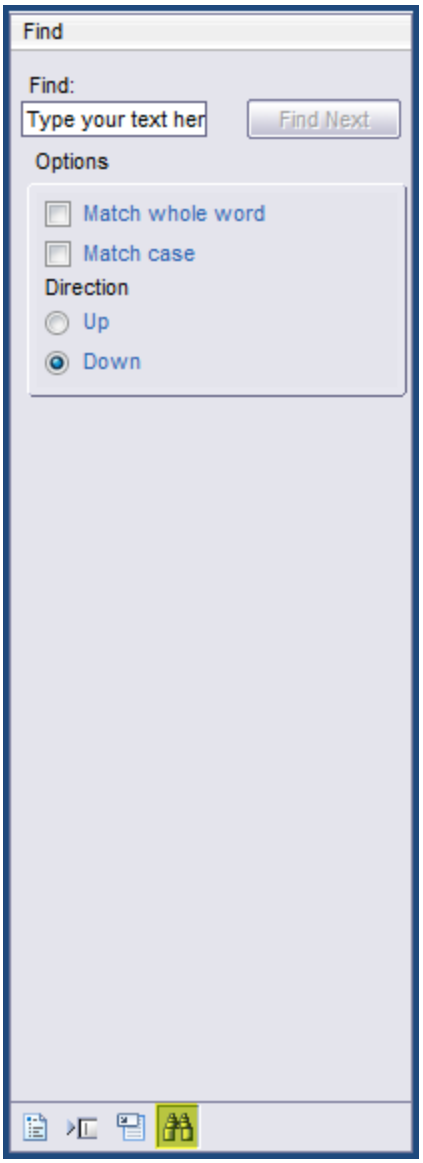
The third button is for Input Controls. This will allow you to filter the data on the tabs. For example, below is the Q15 or Gender Tab. You will see that this table can be filtered by Gender, Household Type or Adult/Child.



Adults		Without Children	With Children and Adults	With Only Children	Unknown Type	Total
Adults	Don't Know / Refused	0	0	0	0	0
	Female	1	3	0	0	4
	Male	3	0	0	0	3
	Missing this information	0	0	0	0	0
	Other	0	0	0	0	0
	Transgendered	2	0	0	0	2
Adults	Subtotal	6	3	0	0	9
	Total	6	3	0	0	9

Personal Identification Number	Name	Program Name	Adult or Child	Gender	Household Type
35E6F9FC-AF21-4E6F-A7F6-2FF9F49288A0	Meyers, Jennifer	Emergency Shelter	Adults	Transgendered	Without Children
6F90B17A-3693-4305-8753-A08FA6799EF7	Zamora, John	Emergency Shelter	Adults	Male	Without Children
8ACD6DA7-AED8-4C2D-97AC-78CB140299B3	Hot, Salt	Emergency Shelter	Adults	Female	With Children and Adults
8BC75C59-DAFB-4E92-9E02-C52032C2A55F	Johnson, Shamika	Emergency Shelter	Adults	Female	Without Children
C9B0D7CB-86BE-4071-AAB3-2406C53DFBC4	Smith, John	Emergency Shelter	Adults	Male	Without Children
E1F219EA-0F49-402F-9342-C54F5991E4CD	Smith, Ginny	Emergency Shelter	Adults	Female	With Children and Adults
E82562D2-1482-4E53-A042-8191AA4D0513	Collins, Jacob	Emergency Shelter	Adults	Transgendered	Without Children
E8C3BA12-91B0-4ECE-AF5E-4DFDB2BAE758	Adams, Chris	Emergency Shelter	Adults	Male	Without Children
F455FDD2-266B-442E-B0F4-6F3073D999E5	Smith, Pamela	Emergency Shelter	Adults	Female	With Children and Adults

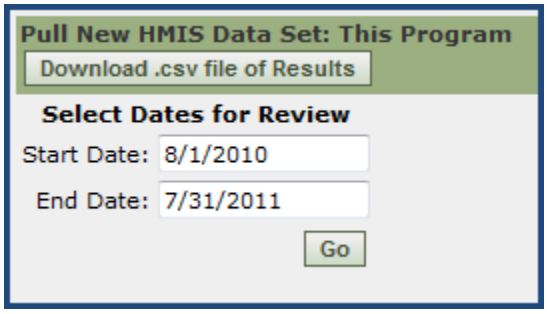
The last button is the Find function. You can search the current tab for particular data.



APR CoC

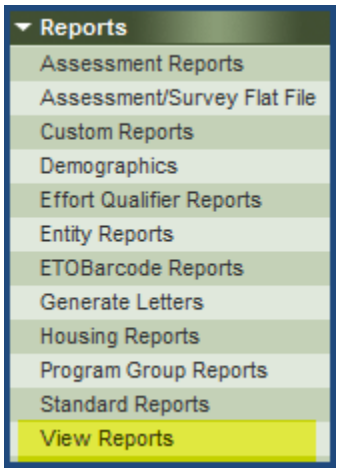
Before running the APR Report a new Data Set must be run within the Custom Reports page.

Step 1 - In order to run the APR, enter the **Start Date as the Date the funding time period started.**

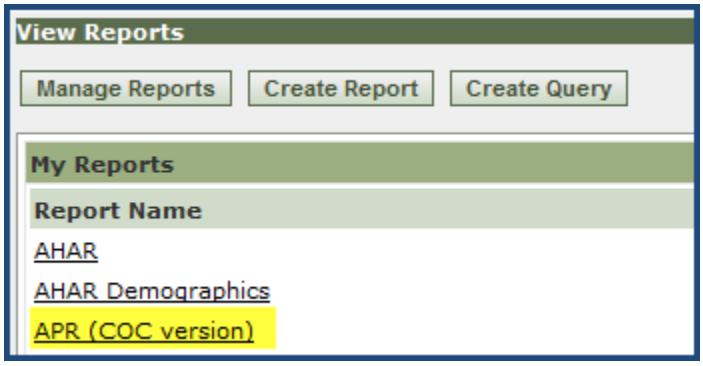


Step 2 – After the Data Set runs, take note of the Export ID.

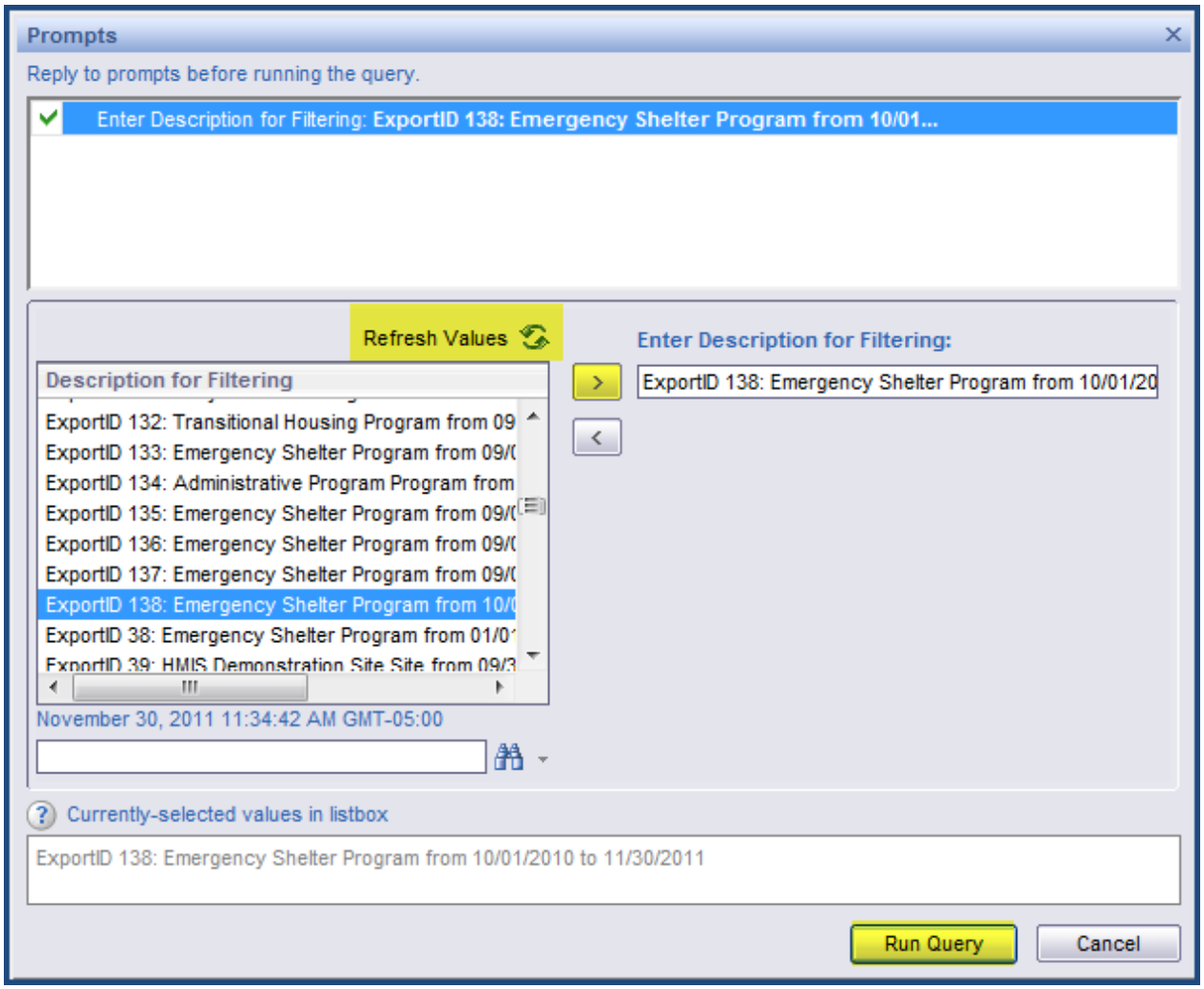
Step 3 - Open the Reports Menu from the ETO Navigation Bar and select View Reports.



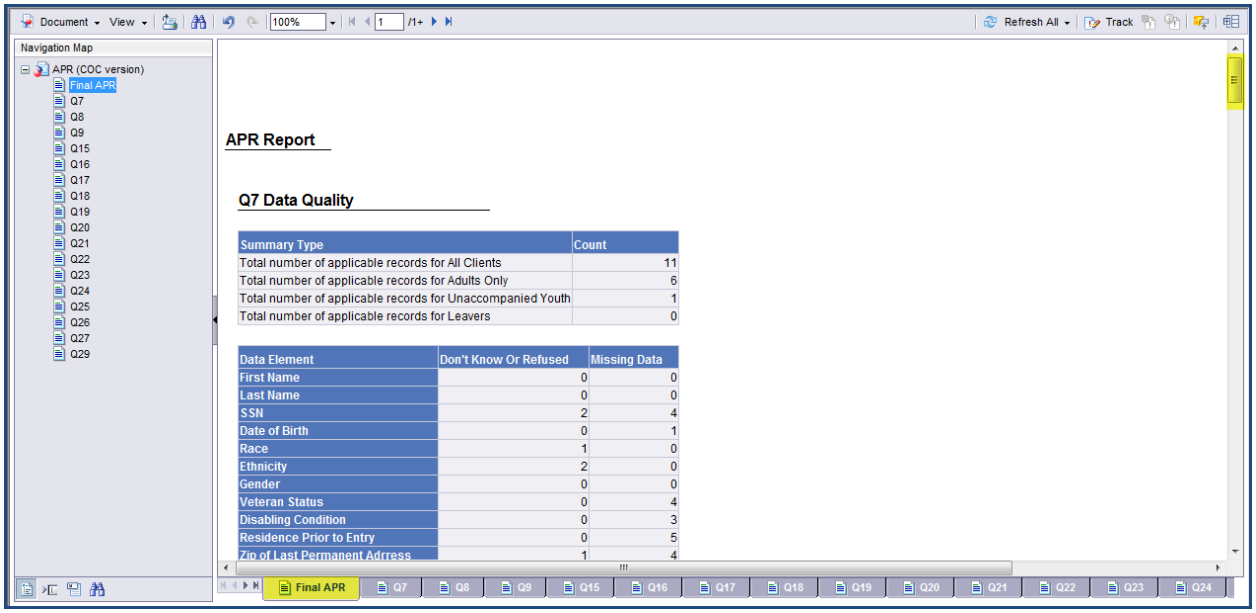
Step 4 – In the Report List, select APR (COC version) or the HPRP APR.



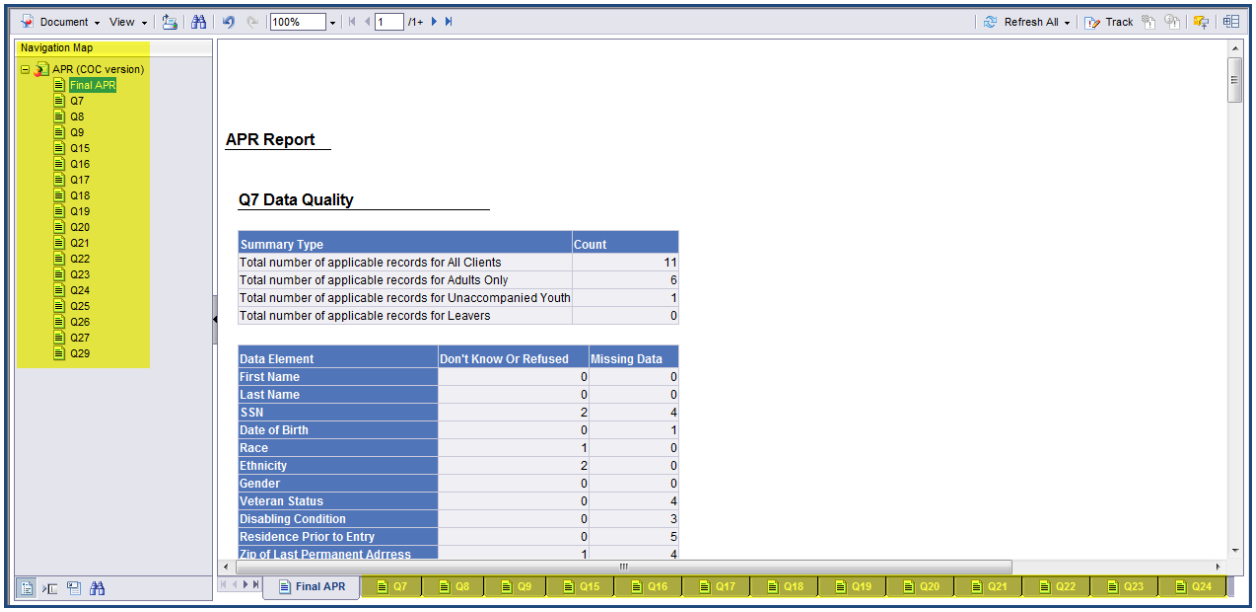
Step 5 – As the APR Report is loading, a prompt will appear for the Export ID. Click the Refresh Values, highlight your Export ID and move it to the Filter Box on the right. Click Run Query.



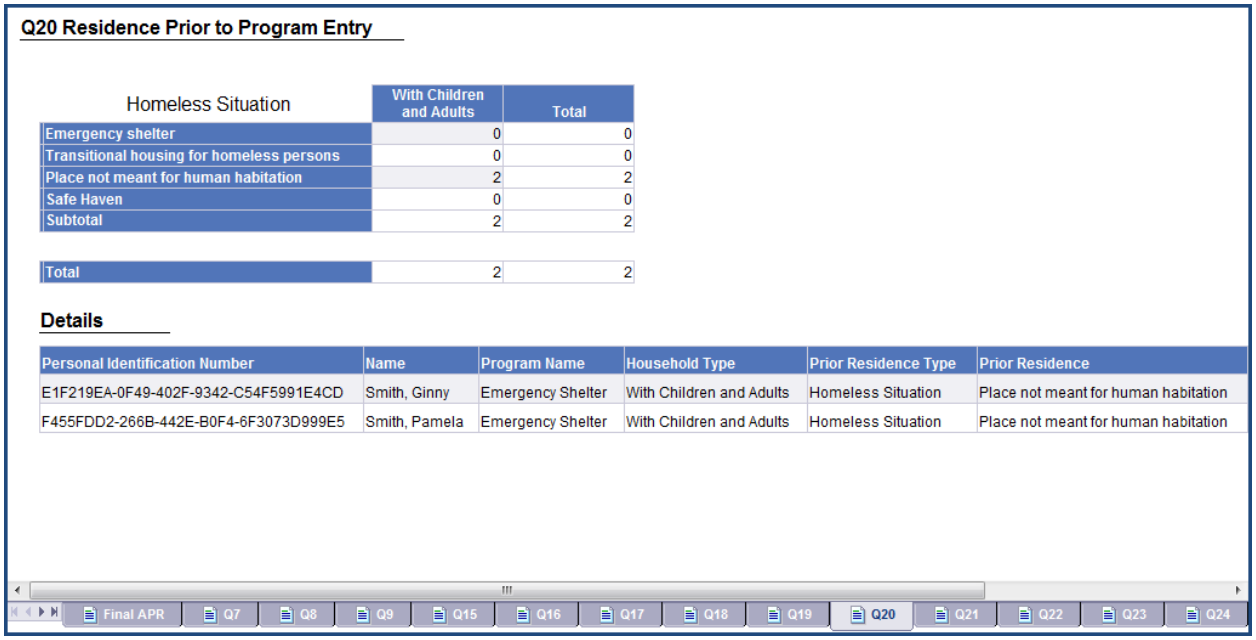
Step 6 – The APR appears on the Final APR Tab. Using the scroll bar to the right, you can scroll down through the report.



Step 7 – The APR has multiple Tabs. Each Tab relates to the HUD defined APR Question. To look at the raw data for each question in this report, click either the Question Number in the Navigation Map or click the Question Tab at the bottom of the screen.



Step 8 – In this example you can view the raw data for Question 20.



Q20 Residence Prior to Program Entry

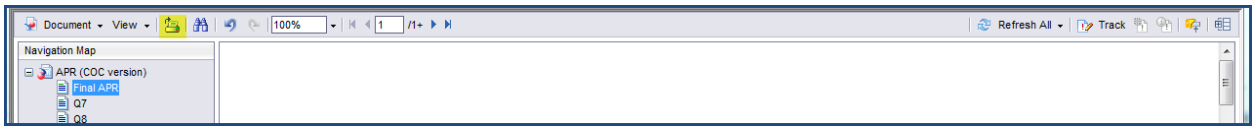
Homeless Situation	With Children and Adults	Total
Emergency shelter	0	0
Transitional housing for homeless persons	0	0
Place not meant for human habitation	2	2
Safe Haven	0	0
Subtotal	2	2
Total	2	2

Details

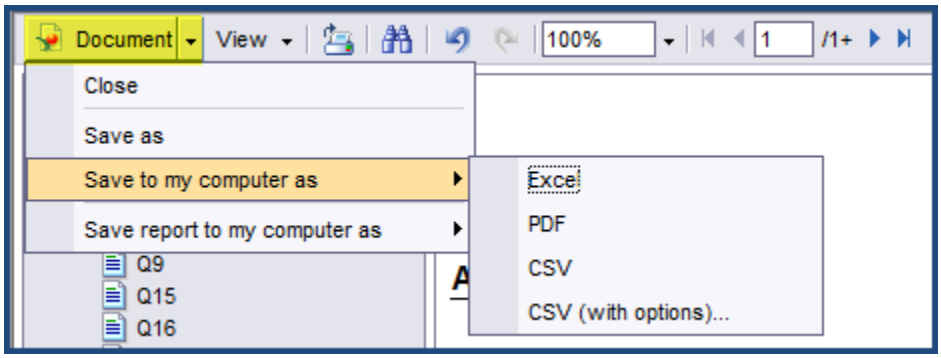
Personal Identification Number	Name	Program Name	Household Type	Prior Residence Type	Prior Residence
E1F219EA-0F49-402F-9342-C54F5991E4CD	Smith, Ginny	Emergency Shelter	With Children and Adults	Homeless Situation	Place not meant for human habitation
F455FDD2-266B-442E-B0F4-6F3073D999E5	Smith, Pamela	Emergency Shelter	With Children and Adults	Homeless Situation	Place not meant for human habitation

Final APR | Q7 | Q8 | Q9 | Q15 | Q16 | Q17 | Q18 | Q19 | Q20 | Q21 | Q22 | Q23 | Q24

Step 9 – To print the APR, click the Printer Icon in the Menu Bar.



Step 10 – To save the APR, click the Document dropdown in the Menu Bar. Select Save to my computer as. You can save the APR as an Excel, PDF, or CSV file.

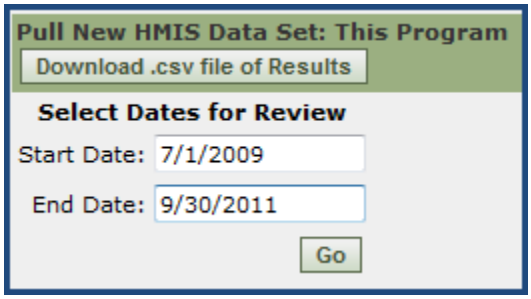


HPRP APR

Step 1 - When running the HPRP APR, your data set date range is very important. As you know, the HPRP APR Report has two date ranges within one report. There is the **Grant to Date (GTD)** and the **Report Date**. The GTD refers to the date your program initially received the HPRP Grant. The Report Date is the specific year of this report.

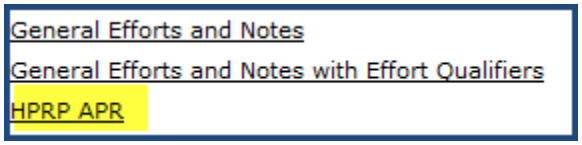
In ETO, you will enter the GTD Start Date as the Start Date for your Data Set in Custom Reports. The Report End Date will be the End Date.

In the example below, the Grant began July 1, 2009 and the end of my reporting year is September 30, 2011.



Step 2 – Once the data set runs, you should get your export ID.

Step 3 – Go to Reports, View Reports in the Navigation Bar and select the HPRP APR Report.



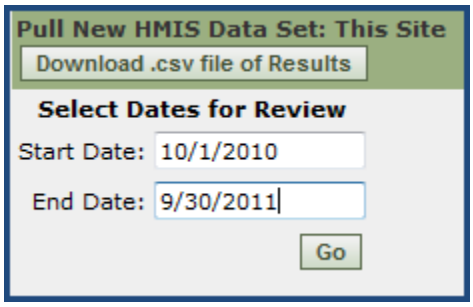
Step 4 – In the Report Prompts Box, you will see 3 prompts. After you highlight the first prompt, you can enter the Report Begin Date. This is the Start Date of your Report Year. The Report End Date is the End Date of your Report Year. The Export is the Export ID you just ran.

In the example below, the report start date is October 1, 2010 and the report end date is September 30, 2011. The export ID is 139.

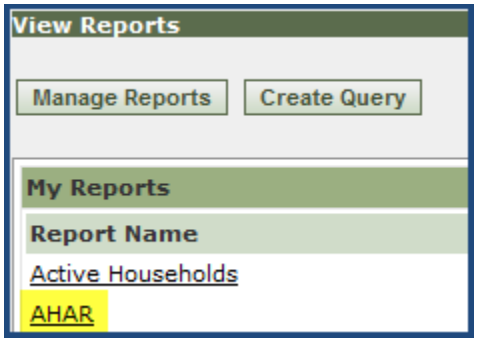
Step 5 – Follow Steps 6 – 10 of the APR Reporting Section

AHAR

Step 1 – Go to Custom Reports and run the data set you wish to use for the AHAR Report.



Step 2 – Go to Reports, View Reports in the Navigation Bar and select the AHAR.



Step 3 – There are multiple prompts for the AHAR Report.

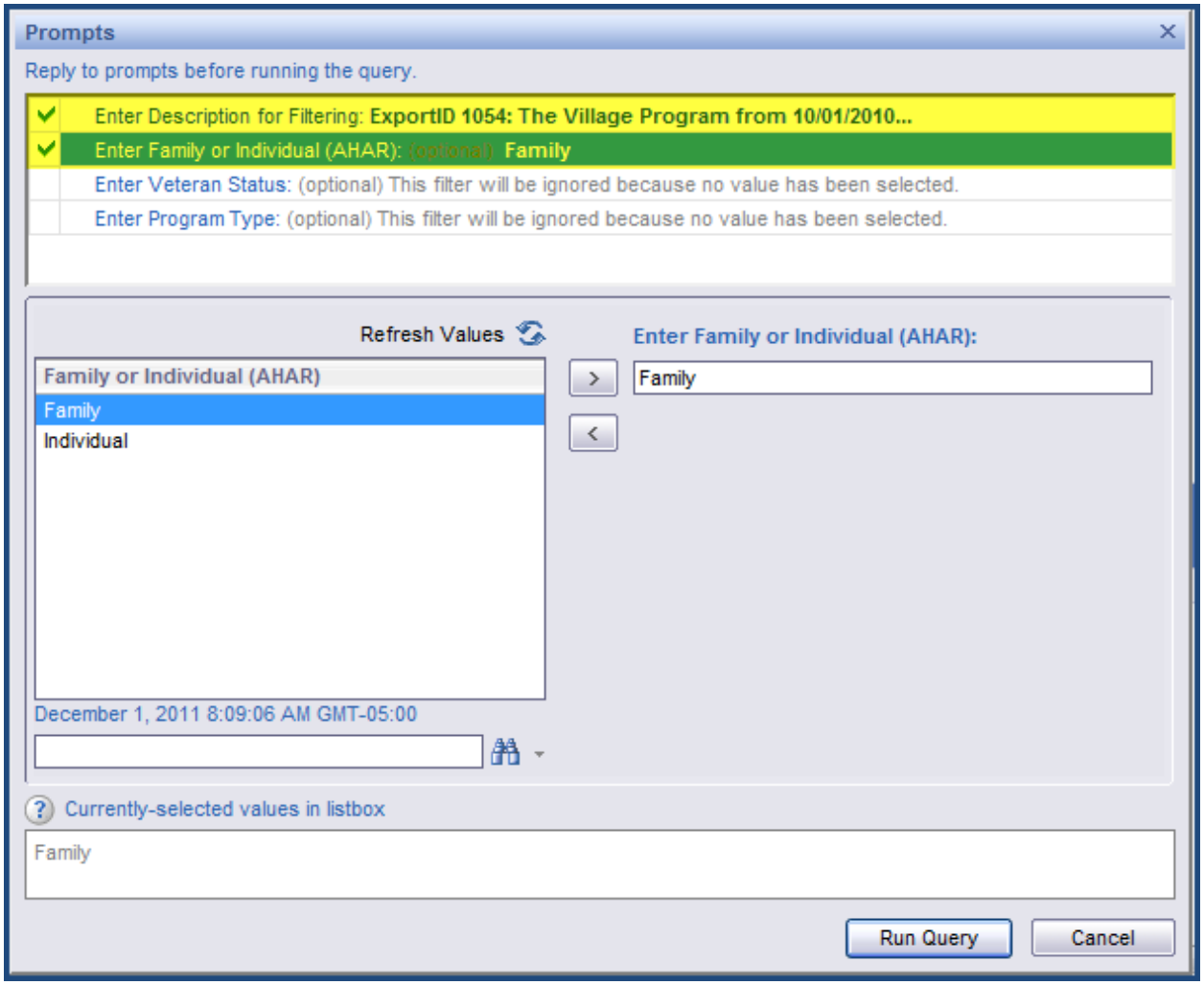
There is one prompt that is required and that is the Export ID.

The Family/Individual prompt is not required, but this is very helpful for the AHAR Report as you need to report by ES Family, ES Individual, TH Family, TH Individual, PSH Family, and PSH Individual. We highly recommend using this prompt.

If you only want to run the report for Veterans, you will select the Veteran Status in the third prompt. Your choices are; Don't Know, Yes and No.

That last prompt is also optional and that is for Program Type. You have choices of Emergency Shelter, Transitional Housing and Permanent Supportive Housing.

In the example below, 2 prompts were used; Export ID and Family/Individual. Select the prompts you wish to use and Run Query.



Step 4 – Follow Steps 6 – 10 of the APR Reporting Section.

It is important to note that the AHAR Report must use the Program Descriptor, Method for tracking residential program occupancy. Please remember to make sure that this has been entered for all AHAR Programs in the Administrative Program Attributes. This needs to be setup by your ETO Site Administrator. (See HMIS Administrator Manual in your ETO Help Wiki)