



# Background



## What are we doing?

- ▶ Launching an Economic Mobility Model, UPWARD, with the City of Fort Worth, Workforce Solutions, Vocational Rehab, and the CoC partner agencies to assist clients to increase their income through enhanced employment or benefits.

## Why are we doing it?

To better connect clients with services that will help support independence.

To make consumers aware of the full array of services available to support self reliance and self determination.

To ensure that consumers have the resources to become and remain stably housed.

# What are We Trying to Achieve?

**Reframe the discussion at Coordinated Entry and at HUD Intakes, Updates and Annual Assessments** to focus on the full array services available to support individual strengths and not just housing.

**Level set expectations** with consumers regarding the housing stock available and the potential time it may take to become housed.

**Lay out a path** toward enhanced income and long term housing stability.

**Enhance the consumer experience** through more efficient matching with services.

Support **dynamic prioritization** and rapid exit from the system.

Increase collaboration and efficiency while **reducing duplication** across the continuum.

**Enhance data** capture to support planning, resource deployment and integration.

# Client Outcomes

## SHORT TERM:

- Clients will experience an increase in income while housed, on the waiting list and when exiting housing as compared to entry.
- Clients will experience a shorter length of stay in ES, RRH or PSH before exiting the system.
- The number/ percent of clients that return to homelessness will decline over time.

## LONGER TERM POTENTIAL CLIENT OUTCOMES:

- Increased client savings.
- Job or educational advancement or increased wages.
- Job retention.

# Model Phases

## Phase 1

Introduce economic mobility discussion at Coordinated Entry and at HUD intake/updates/reassessment/exits for those engaged with CMs and other staff.  
Introduce Rapid Exit to Employment and additional capacity for SOAR/SSI/SSDI.



## Phase 2

Scan for opportunities to assist incumbent clients with disabilities in applying for, obtaining or restoring SSI/SSDI.  
Conduct Employer education and development to increase potential options for clients.



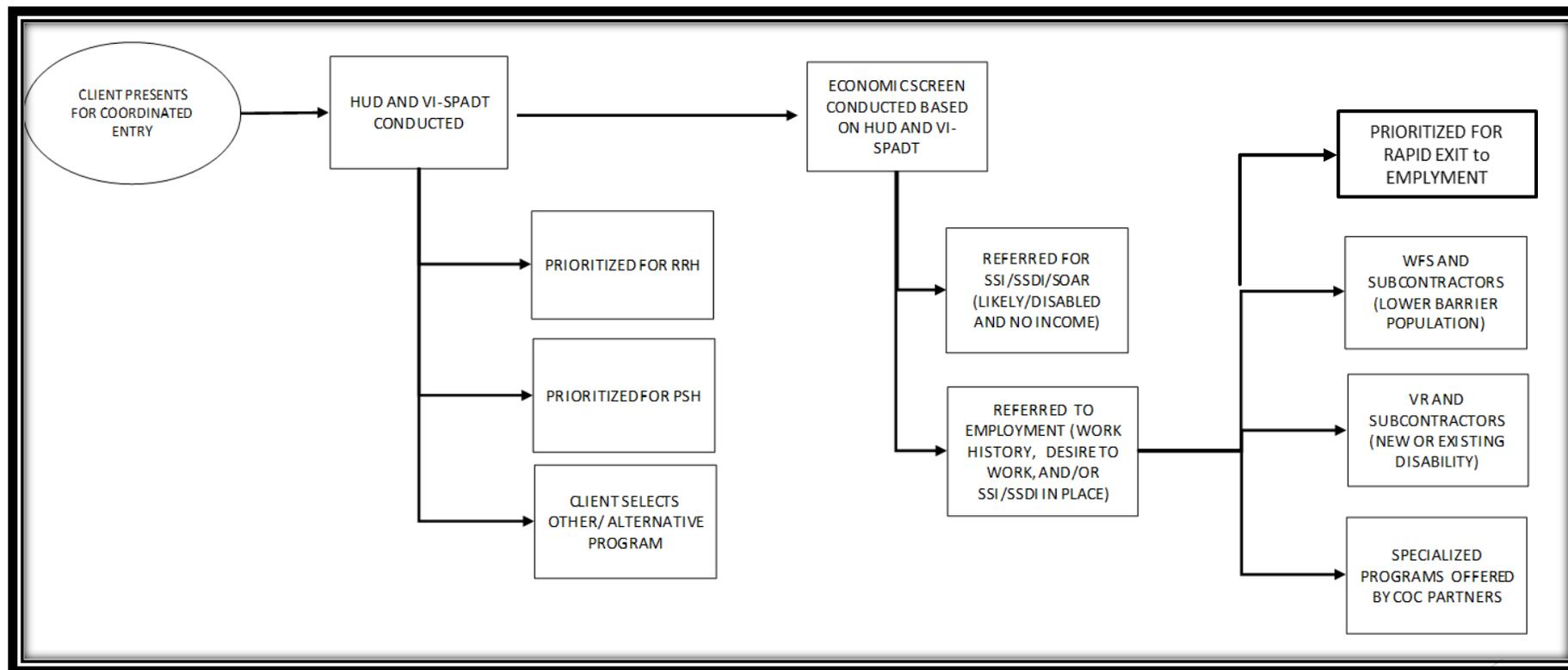
## Phase 3

Introduce Employment Champions to support clients with more intensive needs than system partners can address.  
Conduct data review to understand resource needs and other opportunities.

# New Steps for Coordinated Entry

- ▶ After completing the HUD and VI-SPADT, the assessor/case manager will open a new ETO form called “Employment Referral Form.”
- ▶ The form will require answers to a few questions that will appear on the form as client information is gathered.
- ▶ Based on the responses, the form will trigger a recommendation to help the client improve their income. It is a recommendation only, and the professional should discuss options and finalize the referral based upon the Client’s needs and preferences.
- ▶ The recommendation will also contain brief a script that will help guide the discussion with the client and recap the recommendation.
- ▶ Upon submission, a referral will be sent to the receiving agency, through ETO or email as applicable.
- ▶ For WFS and VR, a referral is generated and TCHC will pull a list twice weekly and forward it to the applicable contact person until the agencies are active on ETO.
- ▶ This form must be completed on 100% of the clients going through the Coordinated Entry process.
- ▶ Clients should be referred for Critical Documents, when necessary, concurrently.
- ▶ Create a touchpoint to document activity, rationale for exceptions or refusals, and key information.

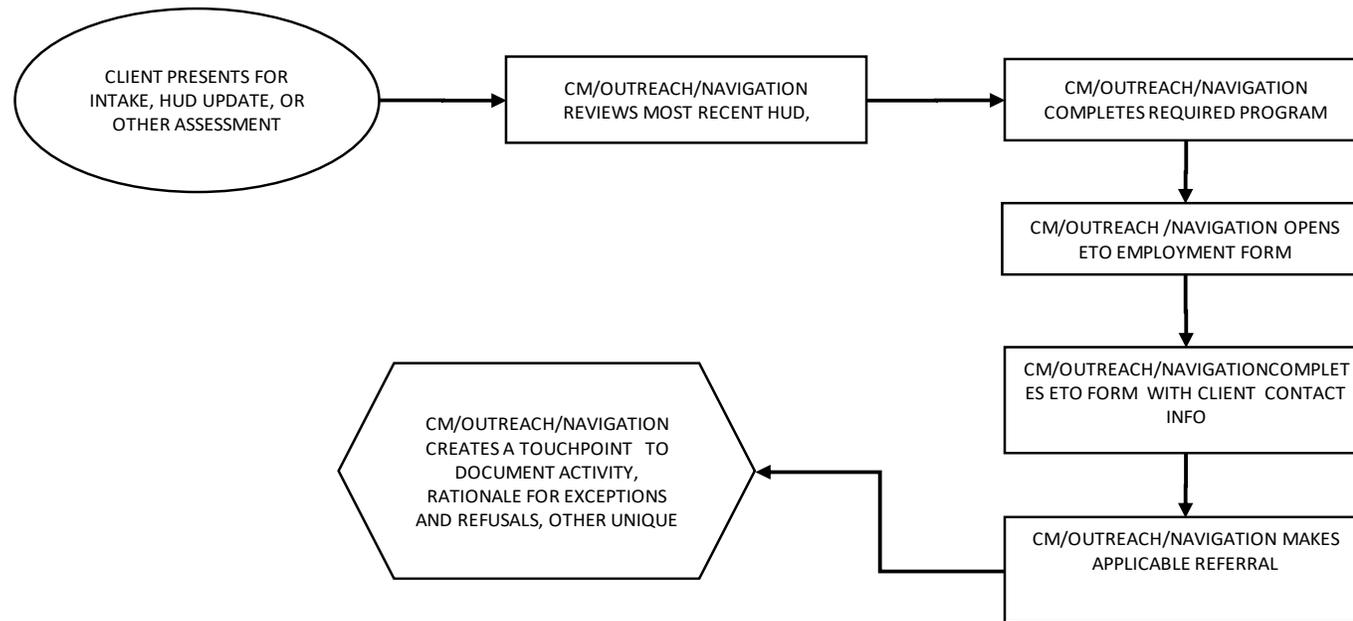
# Coordinated Entry with Model Enhancements



# New Steps for Outreach, Navigators, CMs

- ▶ Review touchpoints, forms, and other applicable documents in preparation for client encounter.
- ▶ After completing the HUD and other applicable assessments with the client, open a new ETO form called “Employment Referral Form.”
- ▶ The form will require answers to few simple questions that appear in response to information entered.
- ▶ Based on the responses, the form will trigger a recommendation to a resource to help the client improve their income. It is a recommendation only, and the professional should discuss options and finalize a referral based upon the Client’s needs and preferences.
- ▶ The recommendation will also contain brief a script that will help guide the discussion with the client and recap the recommendation.
- ▶ Upon submission, a referral will be sent to the receiving agency, through ETO or email as applicable.
- ▶ For WFS and VR, an email with the referrals will be generated or TCHC will pull a list twice weekly and forward it to the applicable contact person.
- ▶ The form must be completed on 100% of the clients undergoing a an intake, update or annual assessment.
- ▶ Create a touchpoint to document the activity, rationale for exceptions or refusals, other key information.

# Navigator, Outreach, and CM Workflow for Incumbent Clients



# Purpose of the ETO Form



The purpose of the ETO form is to promote the highest level of outcomes and service to our clients through:



Capturing data at entry into the system and upon reassessment to better understand the opportunities related to prevention, diversion, dynamic prioritization, and overall utilization of services



Driving more efficient referral recommendations, matching and processes over time



Supporting measurement and evaluation of system interventions and processes over time



Supporting grant reporting and other obligations

We should always presume that people have the ability and desire to be engaged in meaningful activity or work until proven otherwise.

A single parent already engaged with Workforce Solutions, receiving SNAP benefits, etc. and awaiting childcare.

However, in some cases, a referral to employment may be unreasonable, such as:

An older adult already receiving Social Security retirement benefits that does not wish to work or declares an inability to work.

For these circumstances, the ETO form must still be completed using the option for Exception: Select that recommendation and continue with the standard housing process and discussion

A medically unstable person of any age such as a person undergoing hemodialysis, cancer treatment, a person with untreated or poorly controlled serious and persistent mental illness, or similar conditions

Finally, we know that some clients may refuse to strategies to improve their income, and there is an option to record refusals by simply “clicking that option in the ETO form.

# Exceptions and Refusals

# Exceptions and Refusals

Clients with prior refusals or exceptions must still be engaged in the economic screening at every subsequent update unless they are an older adult that is receiving the maximum amount of Social Security and does not wish to consider working

All other clients should be screened and engaged in a discussion about economic mobility options and/or verify that they continue to be clinically unstable, awaiting subsidized childcare, etc. to ensure that they are aware of all of the services available to them.

# HUD Update Assessments

- ▶ Updating the HUD to reflect changes is imperative for compliance with federal regulations that drive CoC funding as well as capturing important information to support program development.
- ▶ The CoC has several areas requiring improvement:
  1. Move in dates
  2. Changes to income
  3. Income at Exit
  4. Exit dates

For the EEMM, all staff conducting HUD intakes, HUD update assessments, etc. will be expected to reflect changes to income as clients become employed or obtain SSI/SSDI.

For those clients served by the Benefit Specialist, he/she will upload documents and correspondence from SSA, complete touchpoints, and update the HUD to reflect the expected change to income based upon the award letter.

# Demonstration of ETO Employment Form

# Step by Step Instructions



Log into ETO



Find the +NEW button and click



Select the Employment Referral Form



Select the Client



Click the NEXT Button



Answer the Questions



Provide detail in the Notes section of the form



Create a CM or Outreach Touchpoint to relay any other critical information

# Next Steps after Completing the ETO form



Document what referral was made using Touchpoint, Case Management notes with any qualifying notes or concerns:

For example: Exception referral made for Jane Doe on the basis of current wound care needs that should be resolved in 1 to 2 months.



Follow the established process to place the client on the applicable housing waitlist



IF a referral was made to a CoC agency, the agency's designated staff will retrieve the referral, accept or decline, and begin outreach process.

The agencies will document the status of the client in a touchpoint, Case Management note and through applicable program enrollment



IF a referral is made to WFS or VR, TCHC will pull a list twice weekly and send to the agency contacts.

VR will begin outreach to the client; Clients must present to Workforce to engage in services.



# Question and Answer

# APPENDIX A

STEP BY STEP INSTRUCTIONS WITH SCREEN PRINTS FROM ETO

TX-601 Intake

CHANGE MESSAGES Staff

Search Term(s)... Within Participa In TX-601 Intake SEARCH

[+ New](#)

**Dashboard Search**

Dashboard Search:

**Recent Participants/Entities**

**Recent Participants**

Name  
john Fake 12Fake

**Recent TouchPoints**

**My Recent TouchPoints**

Take Action	TouchPoint	Dashboard	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Action
	Outreach and Services Contact			TX-601 Intake	12Fake, john Fake	Participant		5/29/2019	5/29/2019	5/29

[+ New](#)

# Find the “NEW” Button in ETO

# Clicking the “NEW” Button brings up the Form Screen

The screenshot displays a web browser window with the URL <https://secure.etosoftware.com/home>. The page header includes the 'eto' logo, the organization name 'Tarrant County Homeless Coalition TX-601 Intake', and user information for 'Laura Hopkins Staff'. A search bar is present with the text 'Search Term(s)...' and filters for 'Within Participa' and 'In TX-601 Intake'. The main content area is titled 'Add Referral' and features a progress bar with four stages: 'Select Participants', 'Referral Form', 'Provider Search', and 'Confirmation'. The 'Select Referral Form' dropdown menu is highlighted, showing the option '-- Select Referral Form --'. The footer contains the 'Social Solutions' logo, copyright information '© 2001-2019 Developed by Social Solutions Global, Inc.', and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.

# Select the Employment Referral Form

The screenshot displays the ETO software interface for the Tarrant County Homeless Coalition. The browser address bar shows the URL <https://secure.etosoftware.com/home>. The user is logged in as Laura Hopkins, Staff. The interface includes a search bar with the text "Search Term(s)...", a dropdown menu for "Within" set to "Participa", and another dropdown menu for "In" set to "TX-601 Intake". A "SEARCH" button is visible.

The main content area is titled "Add Referral" and features a progress bar with four steps: "Select Participants", "Referral Form", "Provider Search", and "Confirmation". The "Referral Form" step is currently active. Below the progress bar, there is a "Select Referral Form:" label followed by a dropdown menu. The dropdown menu is open, showing three options: "-- Select Referral Form --", "-- Select Referral Form --", and "Employment Referral form". The "Employment Referral form" option is highlighted in blue.

The footer of the page includes the "Social Solutions" logo, the copyright notice "© 2001-2019 Developed by Social Solutions Global, Inc.", and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.

# Complete the Questions

The screenshot shows a web browser window with the URL <https://secure.etosoftware.com/home>. The page title is "Tarrant County Homeless Coalition TX-601 Intake". The user is identified as "Laura Hopkins Staff". The interface includes a search bar with the text "Search Term(s)..." and a "SEARCH" button. A navigation menu on the left lists: Home, To-Do List, New, My Favorites, Help, Participants, Participant History, Record Efforts, Referrals, My Work, Entities, TouchPoints, and Reports. The main content area displays a form with the following questions:

- A-3. Household Type**
  - Family
  - Single
  -
- A-5. Does client appear to have a disability and or disclose a disability?** (marked with a red asterisk)
  - Yes
  - No
- A-14. Client refuses potential economic mobility supports?**
  - Yes
  - No
  -
- A-21. Notes**

The footer contains the text "© 2001-2019 Developed by Social Solutions Global, Inc." and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.

# The Tool will Generate a Recommendation

The screenshot displays the eto software interface for a user named Laura Hopkins, Staff, at Tarrant County Homeless Coalition. The interface includes a navigation menu on the left with options like Home, To-Do List, New, My Favorites, Help, Participants, Participant History, Record Efforts, Referrals, My Work, Entities, TouchPoints, and Reports. The main content area shows a search bar with the text "Search Term(s)..." and a dropdown menu set to "TX-601 Intake". Below the search bar, there is a "Clear Selection" button. The main content area displays a question: "A-14. Client refuses potential economic mobility supports?" with radio buttons for "Yes" and "No" (selected). Below this, there is a "Clear Selection" button. A large green arrow points down to a recommendation text: "**Work Force Solutions Script** Congratulations! You are a great match with our Employment and Economic Mobility program. This means that you will most likely end your homelessness through increased income by getting a job/getting back to work. With the help of a counselor at WorkForce Solutions, you can end your homelessness most quickly by getting a job/better job." Below the recommendation, there is a section for "A-21. Notes" with a text input area. The footer of the interface includes the Social Solutions logo, copyright information "© 2001-2019 Developed by Social Solutions Global, Inc.", and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.

# Right Click on the Hyperlink and Open in a New Tab to View the Entire Script and Other Pointers

The screenshot shows a web browser window displaying the 'eto' software interface. The browser address bar shows the URL 'https://secure.etosoftware.com/home'. The page header includes the 'eto' logo, the user name 'Laura Hopkins Staff', and a search bar. The main content area contains a form with several assessment questions:

- A-11. Is client between age 16 and 24? (Radio buttons for Yes and No, with 'No' selected.)
- A-12. Is client a single parent awaiting day care support/opening? (Radio buttons for Yes and No, with 'No' selected.)
- A-13. Is client currently or recently employed with minimal barriers to housing? (Radio buttons for Yes and No, with 'No' selected.)
- A-14. Does client have recent work history and or lower barriers to employment? (Radio buttons for Yes and No, with 'Yes' selected.)
- A-16. Client refuses potential economic mobility supports? (Radio buttons for Yes and No, with 'No' selected.)

Below the questions, there is a section titled 'Work Force Solutions Script' with a hyperlink: [Clients referred to WFS](#). A large green arrow points to this hyperlink. Below the hyperlink is a text area labeled 'A-23. Notes' containing the text: 'Client phone xxx-xxx-xxxx' and 'Goes to TW during the daytime'.

# Include Contact Info/Special Instructions in Notes Section

The screenshot displays the 'eto' software interface for 'Tarrant County Homeless Coalition TX-601 Intake'. The interface includes a search bar, a navigation menu on the left, and a main form area with several questions and a notes section. A green arrow points to the notes section.

**Questions and Answers:**

- A-11. Is client between age 16 and 24?  
 Yes  
 No  
Clear Selection
- A-12. Is client a single parent awaiting day care support/opening?  
 Yes  
 No  
Clear Selection
- A-13. Is client currently or recently employed with minimal barriers to housing?  
 Yes  
 No  
Clear Selection
- A-14. Does client have recent work history and or lower barriers to employment?  
 Yes  
 No  
Clear Selection
- A-16. Client refuses potential economic mobility supports?  
 Yes  
 No  
Clear Selection

**Work Force Solutions Script** Congratulations, you are a great match with our Employment and Economic Mobility program. This means that you will most likely end your homelessness through increased income by getting a job/getting back to work. With the help of a counselor at WorkForce Solutions, you can end your homelessness most quickly by getting a job/better job. [Clients referred to WFS](#)

**A-23. Notes**

Client phone xxx-xxx-xxxx  
Goes to Tx during the daytime

58/1000

# Click the “NEXT” Button to Advance

The screenshot displays the ETO software interface for a user named Laura Hopkins. The main content area is titled "Add Referral" and features a progress bar with four steps: "Select Participants" (completed), "Referral Form" (current step), "Provider Search", and "Confirmation". Below the progress bar are "Previous" and "Next" buttons. A large green arrow points to the "Next" button. The form content includes a section for "A-3. Household Type" with radio buttons for "Family" and "Single" (selected), and a "Clear Selection" button. Below that is a section for "A-5. Does client appear to have a disability and or disclose a disability?" with radio buttons for "Yes" and "No" (selected). The footer contains the text "© 2001-2019 Developed by Social Solutions Global, Inc." and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.

# Select the Applicable Option from the List

The screenshot shows the ETO software interface. The browser address bar displays <https://secure.etosoftware.com/home>. The page header includes the ETO logo, a search bar, and user information for Laura Hopkins, Staff. The main content area displays a table of programs/entities with columns for Provider, Type, Description, Services Provided, County, City, and Zip Code. A green arrow points to the 'Work Force Solutions' row, which is highlighted in green and has its checkbox checked.

Refer	Provider	Type	Description	Services Provided	County	City	Zip Code
<input type="checkbox"/>							
<input type="checkbox"/>	Benefit Specialist	Entity					
<input type="checkbox"/>	Catholic Charities	Entity			Tarrant	Fort Worth	76115
<input type="checkbox"/>	CEC RRH 1	Program	CEC Rapid Exit (formerly CEC RRH 1 and 2)				
<input type="checkbox"/>	Clean Slate	Entity					
<input type="checkbox"/>	Community-Based Rapid Exit Services	Program	Presbyterian Night Shelter Rapid Exit		Tarrant	Fort Worth	76102
<input type="checkbox"/>	Coordinated Entry	Program	Admin & Data Entry for Program Management aspects of TCHC Coordinated Entry System		Tarrant	Fort Worth	76102
<input type="checkbox"/>	Employment Services	Program	Leg UP Employment services only program		Tarrant	Fort Worth	76102
<input type="checkbox"/>	EXCEPTION	Entity					
<input type="checkbox"/>	First Stop	Entity					
<input type="checkbox"/>	Goodwill Works	Program	Goodwill Denton JRC, Weatherfort JRC				
<input type="checkbox"/>	Ladder Alliance	Entity					
<input type="checkbox"/>	No Place like Home	Program					
<input type="checkbox"/>	Rapid Rehousing Combined	Program	Center for Transforming Lives This program combines past "CoC Rapid Rehousing I" and "CoC Rapid Rehousing II"				
<input type="checkbox"/>	Reducing Family Homelessness	Program	Presbyterian Night Shelter				
<input type="checkbox"/>	Refused Employment Services	Entity					
<input type="checkbox"/>	Shelter-Based Rapid Exit Services	Program	Presbyterian Night Shelter Rapid Exit				
<input type="checkbox"/>	VR	Entity					
<input type="checkbox"/>	Women's Center	Entity					
<input checked="" type="checkbox"/>	Work Force Solutions	Entity					
<input type="checkbox"/>	Youth Build	Entity					

Page 1 of 1, items 1 to 20 of 20.

# Click the “NEXT” Button after Making the Selection

The screenshot shows the ETO software interface for adding a referral. The top navigation bar includes the ETO logo, a search bar, and user information for Laura Hopkins. The main content area is titled 'Add Referral' and features a progress bar with four steps: 'Select Participants', 'Referral Form', 'Provider Search', and 'Confirmation'. The 'Referral Form' step is currently active, and a green arrow points to the 'Next' button. Below the progress bar is a table of providers with checkboxes for selection.

Refer	Provider	Type	Description	Services Provided	County	City	Zip Code
<input type="checkbox"/>	Benefit Specialist	Entity					
<input type="checkbox"/>	Catholic Charities	Entity			Tarrant	Fort Worth	76115
<input type="checkbox"/>	CEC RRH 1	Program	CEC Rapid Exit (formerly CEC RRH 1 and 2)				
<input type="checkbox"/>	Clean Slate	Entity					
<input type="checkbox"/>	Community-Based Rapid Exit Services	Program	Presbyterian Night Shelter Rapid Exit		Tarrant	Fort Worth	76102
<input type="checkbox"/>	Coordinated Entry	Program	Admin & Data Entry for Program Management aspects of TCHC Coordinated Entry System		Tarrant	Fort Worth	76102
<input type="checkbox"/>	Employment Services	Program	Leg UP Employment services only program		Tarrant	Fort Worth	76102
<input type="checkbox"/>	EXCEPTION	Entity					
<input type="checkbox"/>	First Stop	Entity					
<input type="checkbox"/>	Goodwill Works	Program	Goodwill Denton JRC, Weatherfort JRC				
<input type="checkbox"/>	Ladder Alliance	Entity					
<input type="checkbox"/>	No Place like Home	Program					
<input type="checkbox"/>	Rapid Rehousing Combined	Program	Center for Transforming Lives This program combines past "CoC Rapid Rehousing I" and "CoC Rapid Rehousing II"				
<input type="checkbox"/>	Reducing Family Homelessness	Program	Presbyterian Night Shelter				
<input type="checkbox"/>	Refused Employment Services	Entity					
<input type="checkbox"/>	Shelter-Based Rapid Exit Services	Program	Presbyterian Night Shelter Rapid Exit				
<input type="checkbox"/>	VR	Entity					

javascript: \_\_doPostBack('btnPrevStep','')

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# Click the “CONFIRM” Button

The screenshot shows a web browser window with the URL <https://secure.etosoftware.com/home>. The page title is "Tarrant County Homeless Coalition TX-601 Intake". The user is logged in as "Laura Hopkins Staff". The interface includes a search bar, a navigation menu on the left, and a main content area with a progress bar and a table.

The progress bar shows four steps: "Select Participants", "Referral Form", "Provider Search", and "Confirmation". The "Provider Search" step is currently active, and a green arrow points to the "Confirm" button.

Name	Provider	Referral Confirmation	Refer	Dismiss
12Fake, John	Work Force Solutions	✓	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Page size: 20 | 1 items in 1 pages

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# A Confirmation of the Referral Submission will Appear; Click “OK” to Finish

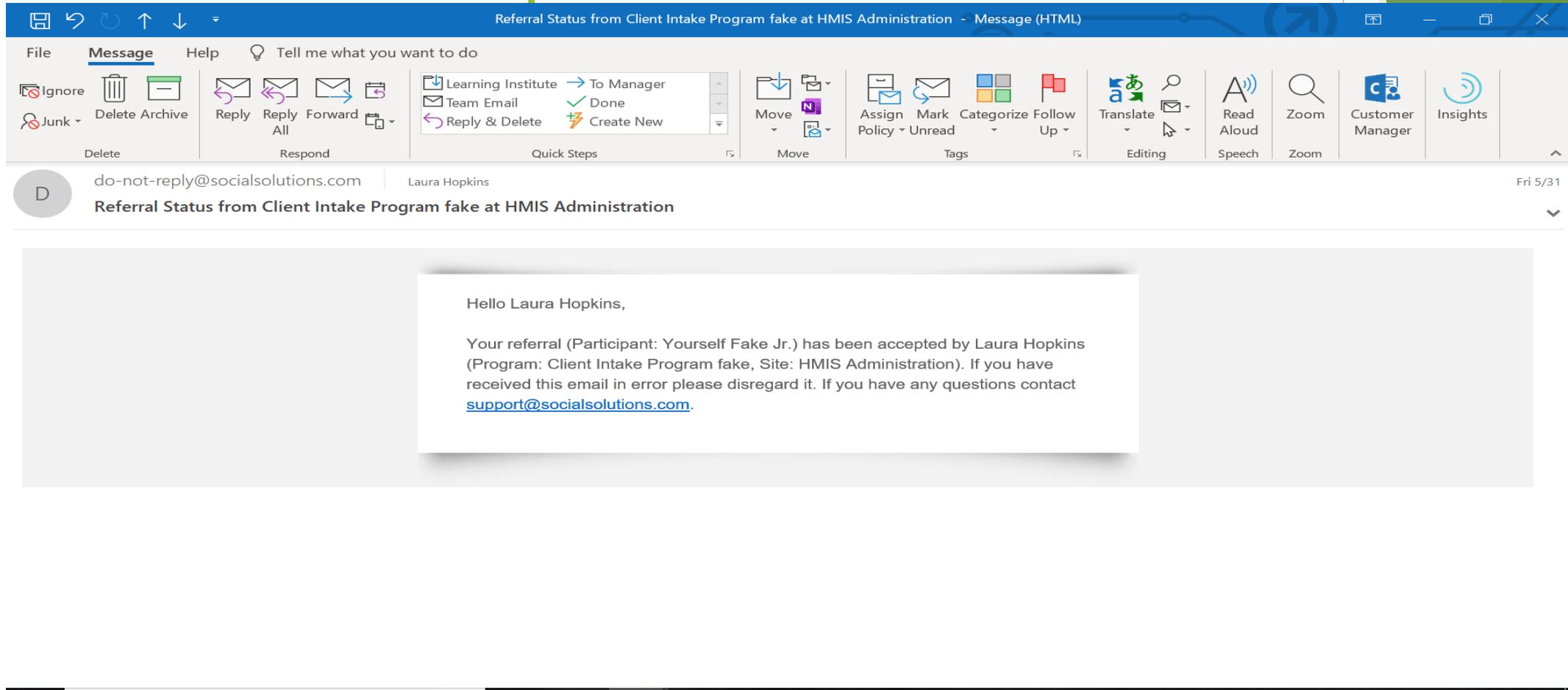
The screenshot displays the ETO software interface in a web browser. The browser address bar shows the URL <https://secure.etosoftware.com/home>. The page header includes the ETO logo, a search bar, and user information for Laura Hopkins, Staff. The main content area is titled 'Add Referral' and features a progress bar with four steps: 'Select Participants', 'Referral Form', 'Provider Search', and 'Confirmation'. The 'Confirmation' step is currently active, indicated by a radio button. Below the progress bar, there are 'Previous' and 'Confirm' buttons. A table lists the referral details:

Name	Provider	Referral Confirmation	
12Fake, john	Work Force Solutions	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table, there is a pagination control showing 'Page size: 20' and '1 items in 1 pages'. A modal dialog box titled 'Submitted' is centered on the screen, containing an information icon and the message 'Your referral has been submitted.' with an 'Ok' button.

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# A Confirmation Email will be Sent when the Client is Accepted or Declined



The screenshot displays an Outlook window with the following elements:

- Window Title:** Referral Status from Client Intake Program fake at HMIS Administration - Message (HTML)
- Menu Bar:** File, Message, Help, Tell me what you want to do
- Command Bar:** Includes icons for Ignore, Delete, Archive, Reply, Reply All, Forward, Reply & Delete, Create New, Move, Assign Policy, Mark Unread, Categorize, Follow Up, Translate, Read Aloud, Zoom, Customer Manager, and Insights.
- Quick Steps:** Learning Institute (To Manager), Team Email (Done), Reply & Delete (Create New)
- Sender:** do-not-reply@socialsolutions.com (Profile picture: D)
- Recipient:** Laura Hopkins
- Date:** Fri 5/31
- Subject:** Referral Status from Client Intake Program fake at HMIS Administration
- Message Body:**

Hello Laura Hopkins,

Your referral (Participant: Yourself Fake Jr.) has been accepted by Laura Hopkins (Program: Client Intake Program fake, Site: HMIS Administration). If you have received this email in error please disregard it. If you have any questions contact [support@socialsolutions.com](mailto:support@socialsolutions.com).