



Training for Providers of Employment Services and Supports

Background

What are we doing?

- ▶ Launching an Economic Mobility Model, called 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 begin to improve the efficiency of referral and communication processes.

To support tracking and measurement of interventions.



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 and communication 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.
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.

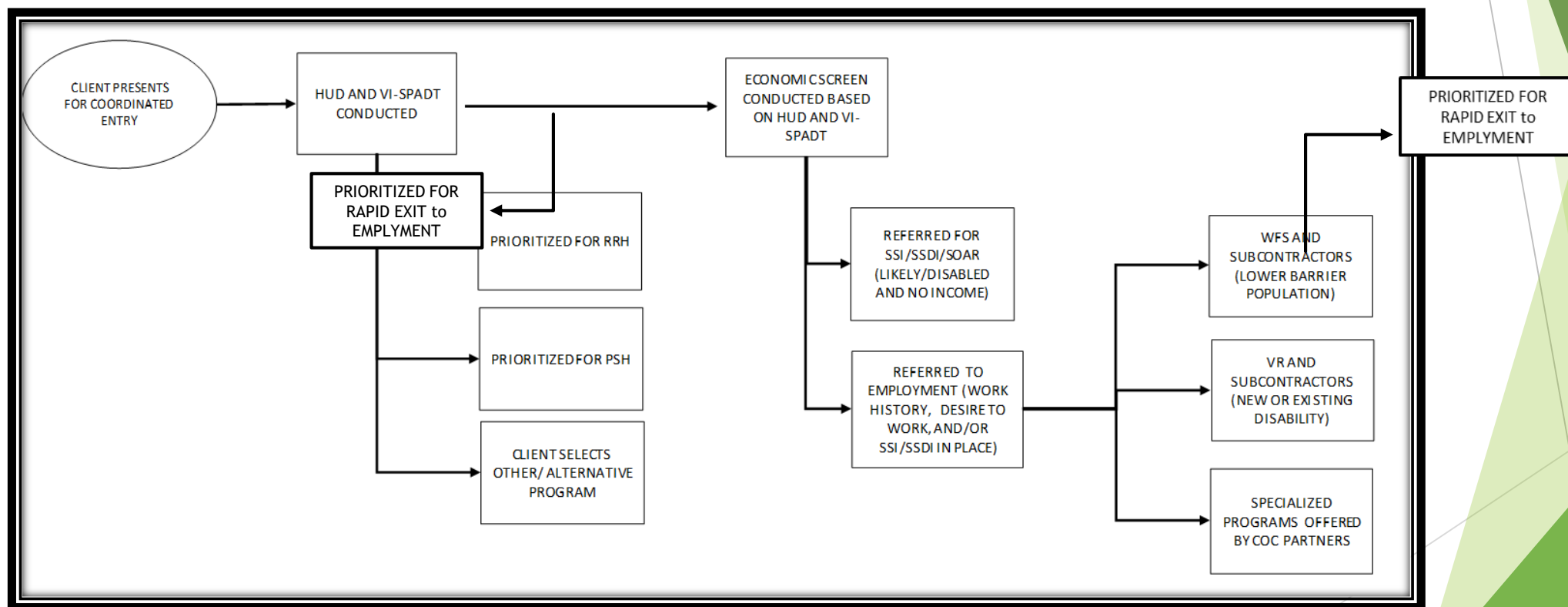
Phase 3

Introduce Employment Champions to support clients with more intensive needs than system partners can address.
Evaluation and reporting to assess processes, interventions, additional opportunities for improvement.

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 a few answers to questions that will appear on the form as client information is gathered.
- ▶ Based on the responses, the form will trigger a recommendation to a resource to help the client improve their income.
- ▶ 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.
- ▶ A touchpoint will be created to document other key information that might be helpful.

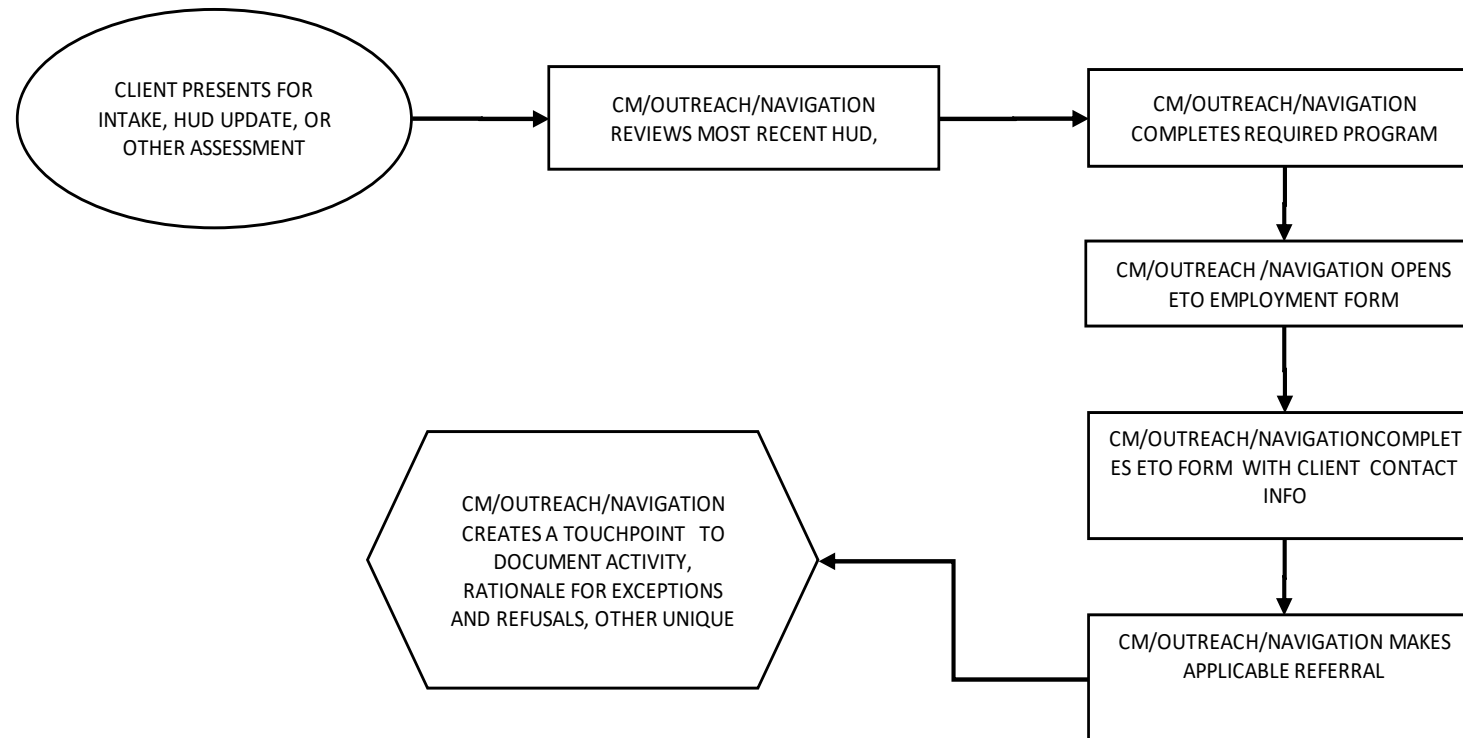
Coordinated Entry with Model Enhancements



New Steps for Outreach, Navigators, CMs

- ▶ After completing the HUD and other applicable assessments with the client, open a new ETO form called “Employment Referral Form.”
- ▶ Based on the responses, the form will trigger a recommendation to a resource to help the client improve their income.
- ▶ Upon submission, a referral will be sent to the receiving agency, through ETO or email as applicable.
- ▶ The form must be completed on 100% of the clients undergoing a an intake, update or annual assessment.
- ▶ A touchpoint will be created to document 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

Process for Receiving Agencies

- ▶ Agencies will receive a referral notice via email based upon the email address provided.
- ▶ The designated individual will then log into ETO and advance to the My Referrals, View Pending Referrals.
- ▶ Review referrals by clicking on the eyeball icon.
- ▶ Accept or deny the referral
 - ▶ For denials, please utilize the drop down to indicate the reason for declining the referral. This will provide vital information so that the CM/Outreach worker can continue to assist the client and refer him/her to a support service, update the HUD, or other applicable activity.
 - ▶ For those clients accepted, the system will generate a note to the referring CM or other staff.
 - ▶ Periodic updates via CM touchpoint will help to keep all colleagues aware of the client status
- ▶ Begin engagement with the client.

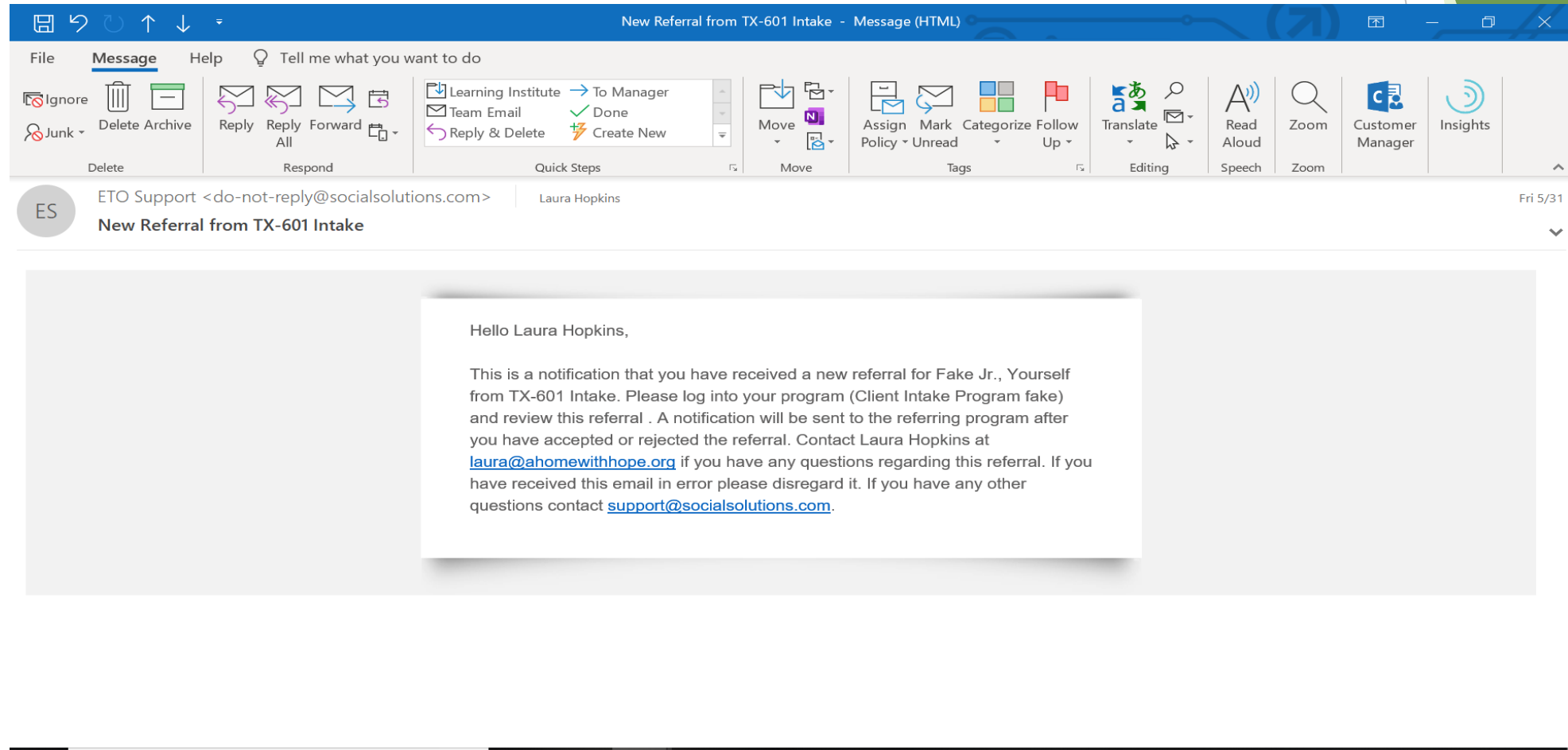


Forward Versus Rejection

- ▶ Please consider forwarding a referral to another agency under the following circumstances:
- ▶ Client has been a prior participant with your agency, and he/she has exhausted your agency's offerings, may have specialized needs that could be better met by another agency
- ▶ Your agency is currently at capacity, but you are aware of another organization that could accommodate the client's needs
- ▶ The client requires a prerequisite of some type: for example, he/she needs WIOA approval before the applicable supports can be provided

Process Step by Steps

Sample Email as a New Referral is Made



The screenshot displays an Outlook window titled "New Referral from TX-601 Intake - Message (HTML)". The interface includes a ribbon with tabs for File, Message, and Help. The Message tab is active, showing various actions like Ignore, Delete, Archive, Reply, Reply All, Forward, and Reply & Delete. There are also Quick Steps, Move, Assign Policy, Mark Unread, Categorize, Follow Up, Translate, Read Aloud, Zoom, Customer Manager, and Insights options. The email header shows the sender as "ETO Support <do-not-reply@socialsolutions.com>" and the recipient as "Laura Hopkins". The subject is "New Referral from TX-601 Intake". The email body contains the following text:

Hello Laura Hopkins,

This is a notification that you have received a new referral for Fake Jr., Yourself from TX-601 Intake. Please log into your program (Client Intake Program fake) and review this referral . A notification will be sent to the referring program after you have accepted or rejected the referral. Contact Laura Hopkins at laura@ahomewithhope.org if you have any questions regarding this referral. If you have received this email in error please disregard it. If you have any other questions contact support@socialsolutions.com.

Advance to Referrals and Review Pending Referrals or Search Client to Review additional Information

The screenshot shows the eto software interface. The top navigation bar includes the eto logo, 'HMIS Administration Client Intake Program fake', and user information for 'Laura Hopkins Staff'. A search bar contains the text 'fake'. Below the search bar, the 'Quick Search Results' section shows 'Matches for: fake' and 'Total Participants: 3'. A table lists the results, with columns for 'Participant Name', 'SSN', and 'Program Start Date'. A green arrow points to the 'SSN' column header. The table contains three rows of data:

| Participant Name | SSN | Program Start Date |
|--------------------|-------------|--------------------|
| 12Fake, john | 000-00-0000 | 207380 |
| 1Fake10, Romeo | | 11381 |
| Fake Jr., Yourself | 123-45-9200 | 212879 |

The interface also shows a sidebar with navigation options like 'New', 'My Favorites', 'Help', 'Participants', 'Participant History', 'Record Efforts', 'Referrals', 'Add Referral', 'View / Edit Referrals', 'View Pending Referrals', and 'My Work'. A green arrow points to the 'Referrals' section in the sidebar.

Go to Pending Referrals Tab to Find Options for the Referral

https://secure.etosoftware.com/h x +

https://secure.etosoftware.com/home

eto

HMIS Administration
Client Intake Program fake

CHANGE MESSAGES

Laura Hopkins
Staff

Search Term(s)...

Within Participants In Client Intake Program fake SEARCH

Referrals to Client Intake Program fake

Pending Referrals

| Name | Referring Program | Referring Site | Services Needed | Referring Date | Program Start Date | Approval Status | Take Action |
|--------------------|-------------------|-----------------------------------|-----------------|----------------|--------------------|-----------------|-------------|
| Fake Jr., Yourself | TX-601 Intake | Tarrant County Homeless Coalition | | 6/5/2019 | 6/5/2019 | None | |

Page size: 20 1 items in 1 pages

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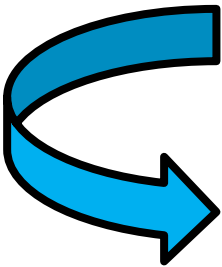
Click on Icon to Complete Task



- ▶ Check mark to accept the referral

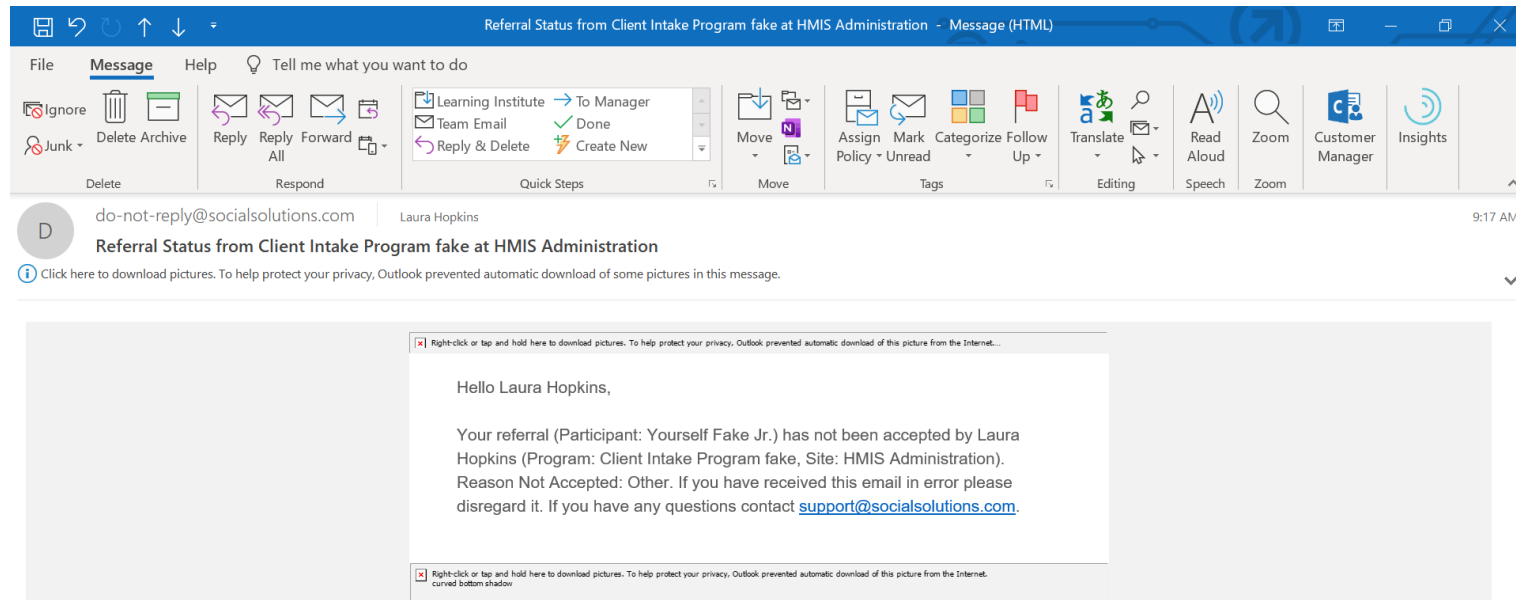


- ▶ X to decline



- ▶ Arrow to forward to another resource

The Referring Source will Receive an Email Regarding the Status



If Client is Declined, a Pop-Up Box Will Appear Requiring Confirmation

The screenshot displays the eto software interface. At the top, the browser address bar shows 'https://secure.etosoftware.com/home'. The page header includes the 'eto' logo, 'HMIS Administration Client Intake Program fake', and user information for 'Laura Hopkins Staff'. A search bar and filters are visible above the main content area.

The main content area is titled 'Recent Referrals (NEW)' and 'My Recent Referrals'. It contains a table with the following columns: 'Take Action', 'Name', 'Referred By', 'Referral', 'Referral', 'Referring Site | Program', 'Destination Program', 'Services Needed', and 'Referring Date'. A pop-up box titled 'Confirm message from web page' is overlaid on the table, asking 'Are you sure you want to reject this referral?' with 'OK' and 'Cancel' buttons.

| Take Action | Name | Referred By | Referral | Referral | Referring Site Program | Destination Program | Services Needed | Referring Date |
|-------------|--------------------|----------------|----------|--------------------------|---|---------------------|-----------------|----------------|
| | Fake Jr., Yourself | Hopkins, Laura | | | | | | 6/5/2019 |
| ✓ ✕ | Fake Jr., Yourself | Hopkins, Laura | | | | | | 6/5/2019 |
| | Fake Jr., Yourself | Hopkins, Laura | | | | | | 6/4/2019 |
| | 12Fake, john Fake | Hopkins, Laura | Entity | Employment Referral form | Tarrant County Homeless Coalition TX-601 Intake | | | 6/4/2019 |
| | 12Fake, john Fake | Hopkins, Laura | Entity | Employment Referral form | Tarrant County Homeless Coalition TX-601 Intake | | | 6/3/2019 |
| | 12Fake, john Fake | Hopkins, Laura | Entity | Employment Referral form | Tarrant County Homeless Coalition TX-601 Intake | | | 6/3/2019 |
| | 12Fake, john Fake | Hopkins, Laura | Entity | Employment Referral form | Tarrant County Homeless Coalition TX-601 Intake | | | 6/3/2019 |

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Once a Rejection is Declined, A Drop Down Box will Appear to Capture the Rationale

The screenshot displays the eto software interface. At the top, a navigation bar includes the eto logo, a 'CHANGE' button with a pencil icon, a 'MESSAGES' button with an envelope icon, and a user profile for 'Laura Hopkins Staff'. Below this is a search bar with the text 'Search Term(s)...' and a 'SEARCH' button. The main content area shows a dropdown menu with the following options: Clinically Unstable, Completed Program, Criminal Action/Property Destruction, Death, Found job/better job since initial scre, Lack of Funds, Needs Could Not Be Met by Project, No Show, Non-Compliance with Project, and Other. At the bottom of the dropdown are 'Continue' and 'Cancel' buttons. A footer at the bottom of the page contains 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.

Demonstration



Question and Answer