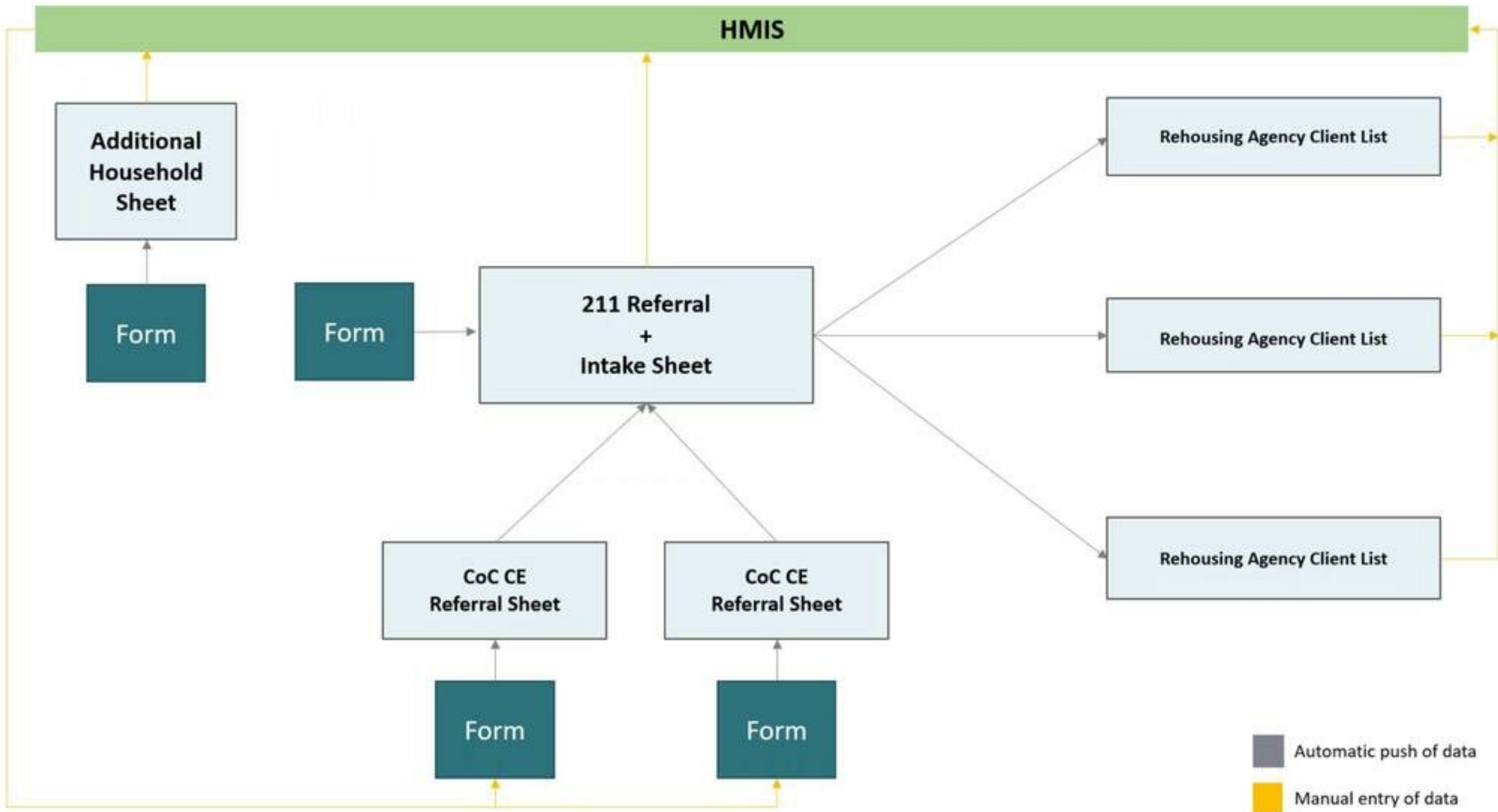# Smartsheet Overview

- Sheets (Each Rehousing Agency will have one sheet – B@H Client List)
  - Where information lives, like an excel doc
- Forms
  - Feed info to sheets, can use conditional logic
- Reports (Each Rehousing Agency will have several)
  - Pulls specific information from sheets
  - Can combine information from several sheets into one report
  - Can update information on sheet from report
  - Can sort and change order of columns
- Portals (Each Rehousing Agency will have one)
  - Acts like a website, quick access to smartsheet items or other links
- Dashboards
  - Different view (often in charts) of information from sheets

NCCEH

Features + Tools

- Access/Sharing
  - Admin - Edit - Read - Public
- Automated Workflows
  - Alerts
  - Copy Row
- Conditional Formatting
- Formula Column
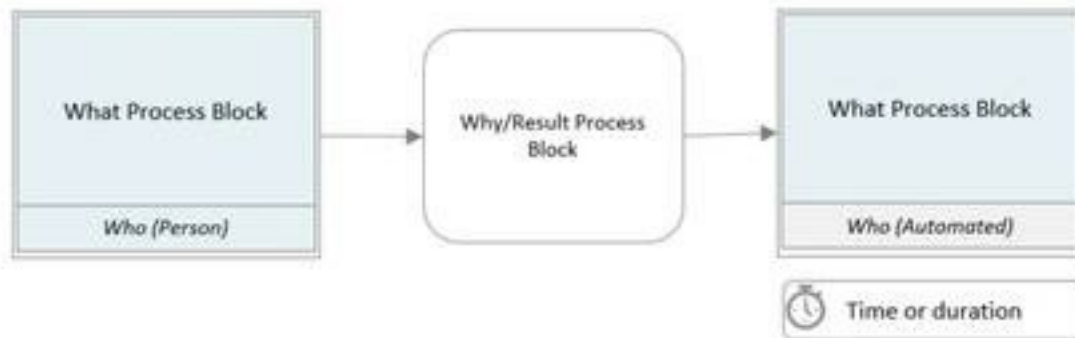
NCCEH

Today's Goal

- Review new workflow for receiving new clients, enrollment, and list management
    - Receive client information + contact
    - Verify eligibility and enroll in program
    - Keep client list updated as you work with client
        - Update move-ins the day it happens. (We'll soon have a dashboard with live data!) Best practice to have all other client updates by end of COB Friday.
    - HMIS workflows remain same

- Move forward with minimal viable product. We can make improvements based on feedback over time.

NCCEH

Key

Blocks

```
┌─────────────────────┐        ┌──────────────┐        ┌─────────────────────┐
│  What Process Block  │ ────▶  │ Why/Result   │ ────▶  │  What Process Block  │
│                      │        │ Process      │        │                      │
│                      │        │ Block        │        │                      │
├─────────────────────┤        └──────────────┘        ├─────────────────────┤
│    Who (Person)      │                                │   Who (Automated)    │
└─────────────────────┘                                └─────────────────────┘
```

🕓 Time or duration

Links to Other Information + Action Item Notes

📎

Link to
Information
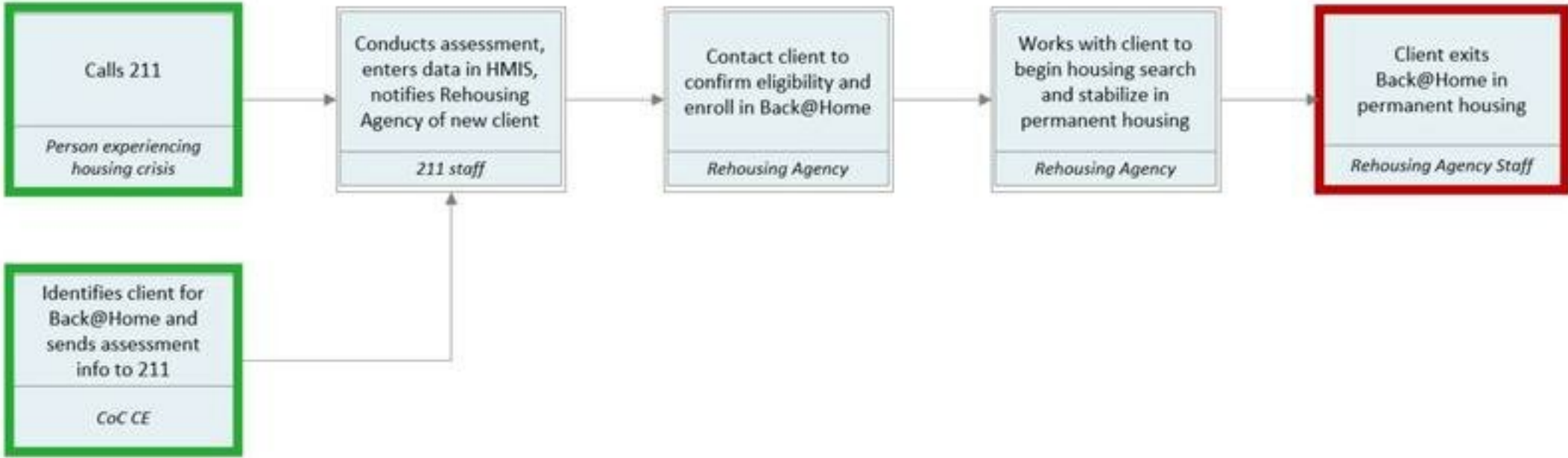(use comments
from review tab)

Link to
File

Go down
a level

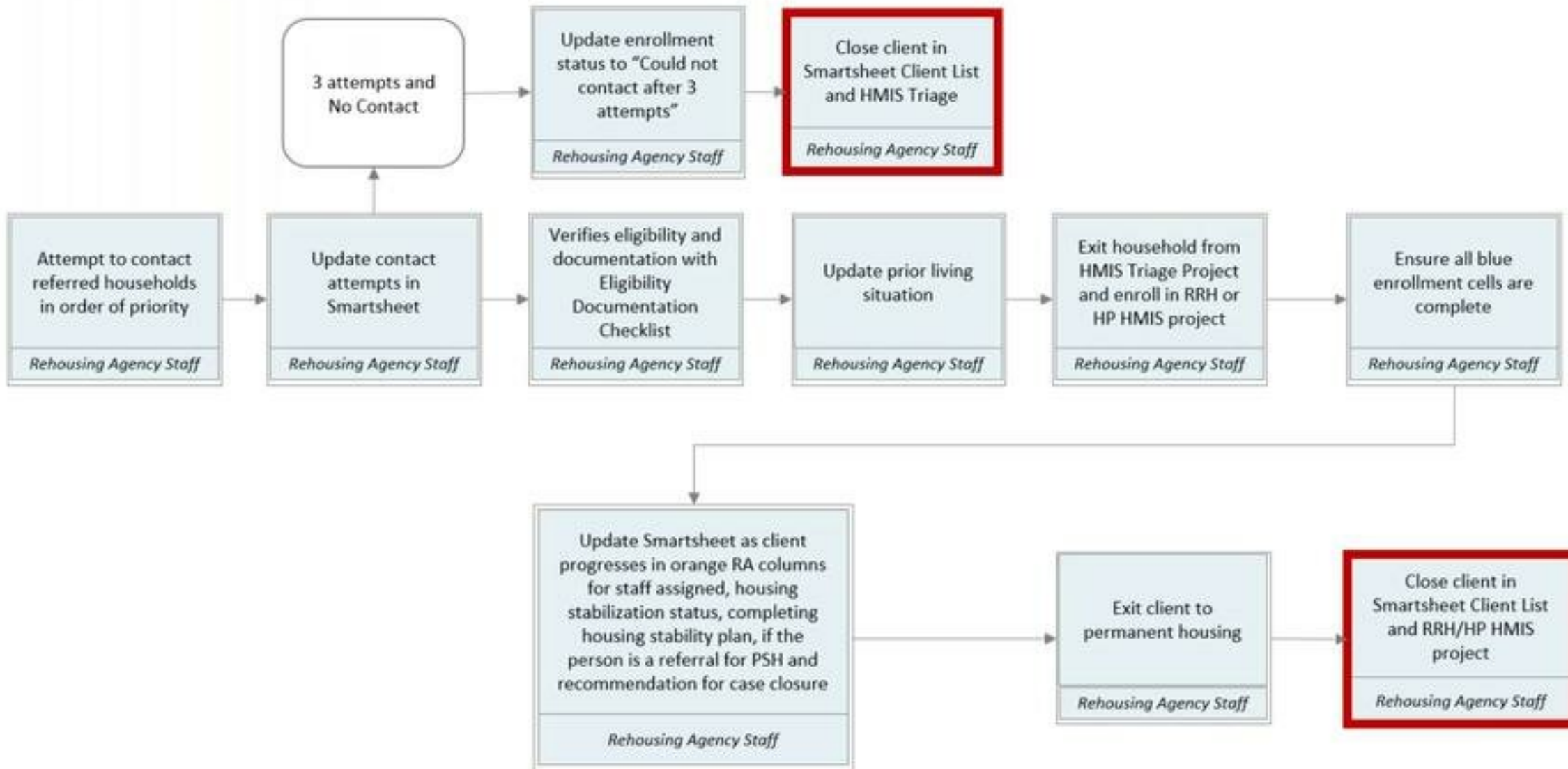Step In tracker
(smartsheet
or other)

Back@Home-CV Referral + Intake (The Basics)

Rename these steps to be specific to your project!

```
┌─────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│    Calls 211    │─────▶│ Conducts assessment,│─────▶│  Contact client to  │─────▶│ Works with client to│─────▶│    Client exits     │
│                 │      │ enters data in HMIS,│      │ confirm eligibility │      │ begin housing search│      │   Back@Home in      │
│                 │      │  notifies Rehousing │      │ and enroll in       │      │ and stabilize in    │      │  permanent housing  │
│ Person          │      │  Agency of new      │      │ Back@Home           │      │ permanent housing   │      │                     │
│ experiencing    │      │  client             │      │                     │      │                     │      │ Rehousing Agency    │
│ housing crisis  │      │                     │      │ Rehousing Agency    │      │ Rehousing Agency    │      │ Staff               │
│                 │      │     211 staff       │      │                     │      │                     │      │                     │
└─────────────────┘      └─────────────────────┘      └─────────────────────┘      └─────────────────────┘      └─────────────────────┘
                                   ▲
┌─────────────────┐                │
│ Identifies      │                │
│ client for      │                │
│ Back@Home and   │────────────────┘
│ sends assessment│
│ info to 211     │
│                 │
│    CoC CE       │
└─────────────────┘
```
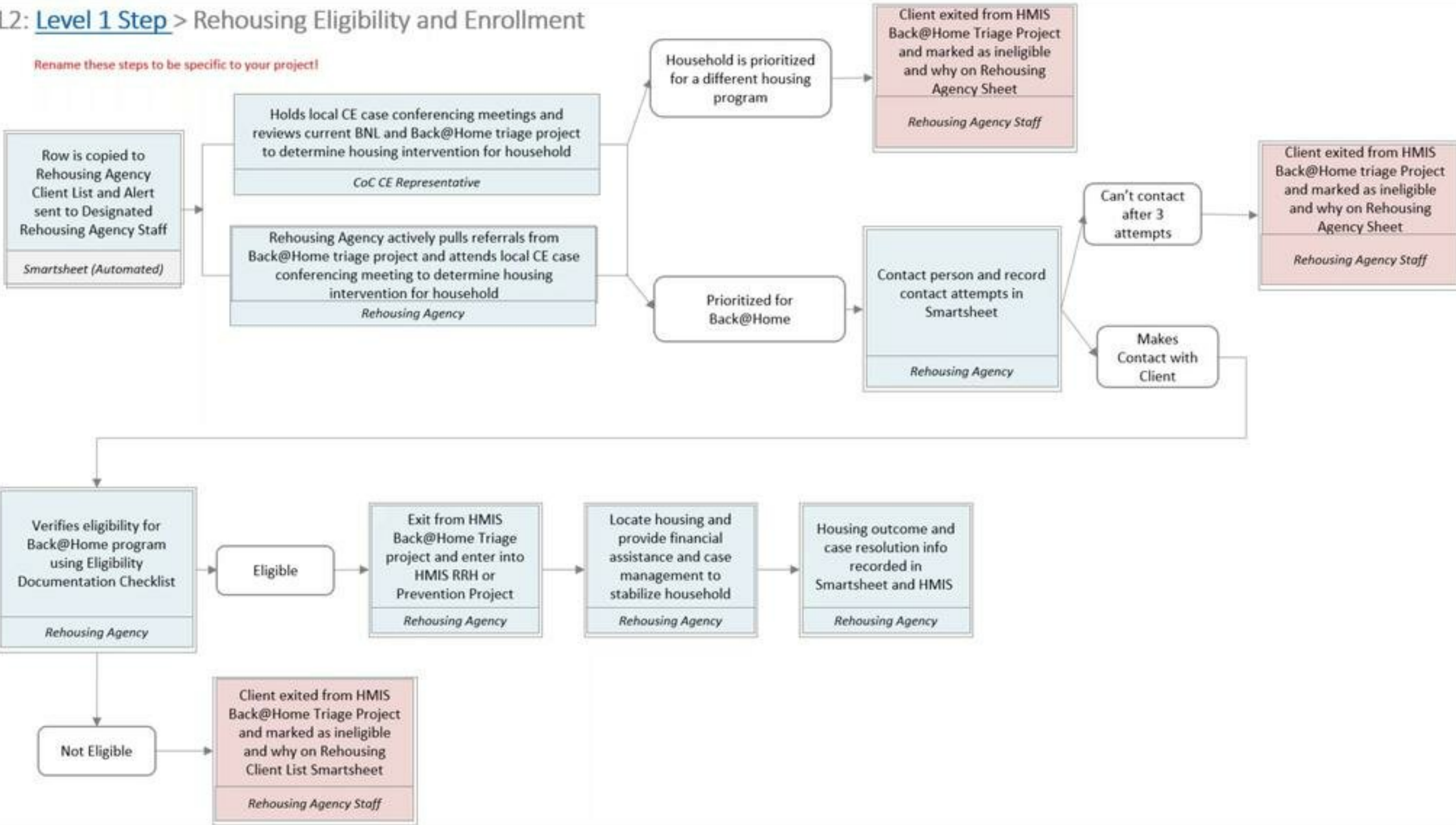
Timeline for Smartsheet Launch

- Rehousing Agency Training 12.1.20

- 211 starts assessments with callers 12.1.20
  - (soft launch, no announcements)

- Rehousing Agency Sheets can be accessed
  - Surge population data will be entered from NCCARE360 and ready for use by Monday 12.7.20

- Referral + Intake Troubleshooting and Support Call Thurs 12.3.20 2-3PM

- Email backathome@ncceh.org for support,
  - additional calls/training can be scheduled as needed

NCCEH

L2: Level 1 Step > Rehousing Eligibility and Enrollment

Rename these steps to be specific to your project!

Row is copied to Rehousing Agency Client List and Alert sent to Designated Rehousing Agency Staff

Smartsheet (Automated)

Holds local CE case conferencing meetings and reviews current BNL and Back@Home triage project to determine housing intervention for household

CoC CE Representative

Rehousing Agency actively pulls referrals from Back@Home triage project and attends local CE case conferencing meeting to determine housing intervention for household

Rehousing Agency

Household is prioritized for a different housing program

Client exited from HMIS Back@Home Triage Project and marked as ineligible and why on Rehousing Agency Sheet

Rehousing Agency Staff

Prioritized for Back@Home

Contact person and record contact attempts in Smartsheet

Rehousing Agency

Can't contact after 3 attempts

Client exited from HMIS Back@Home triage Project and marked as ineligible and why on Rehousing Agency Sheet

Rehousing Agency Staff

Makes Contact with Client

Verifies eligibility for Back@Home program using Eligibility Documentation Checklist

Rehousing Agency

Eligible

Exit from HMIS Back@Home Triage project and enter into HMIS RRH or Prevention Project

Rehousing Agency

Locate housing and provide financial assistance and case management to stabilize household

Rehousing Agency

Housing outcome and case resolution info recorded in Smartsheet and HMIS

Rehousing Agency

Not Eligible

Client exited from HMIS Back@Home Triage Project and marked as ineligible and why on Rehousing Client List Smartsheet

Rehousing Agency Staff

211 Assessment for Back@Home-CV

Assessment Intro Statement:

[READ]: From what you have shared with me so far, it seems like you could be a potential applicant for the Back@Home program.

Back@Home aims to assist clients that are at risk of homelessness or are homeless by providing case management and financial resources.

Do you mind if I ask you screening questions to see if we should proceed with the referral?

[DO NOT READ]: Complete this form and return to the sheet to confirm eligibility.

1. What is your first name? *
[READ]: can you please spell your first name as it is on your ID?

2. What is your last name? *
[READ]: can you please spell your last name as it is on your ID?

3. What, if any, suffix do you use?
(Jr., Sr., III, etc.)

4. Are you in a safe place where you're able to answer personal questions? *
[READ]: I need to ask you questions regarding yourself including housing history, income, and challenges to housing. This can take 20-30 minutes so I want to make sure you currently feel safe to answer these questions.

[DO NOT READ]: If the caller indicates they are currently at safety risk for domestic or interpersonal violence, please refer them to their local domestic violence shelter hotline. If the caller indicates that they are currently in an unsafe location, please instruct them to call back when they have moved to a safer location.

Select   ▾

HMIS Consent

[READ]: Your answers to the next questions will help determine if you are eligible and for Back@Home services.

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Select   ▼

HMIS Consent

[READ]: Your answers to the next questions will help determine if you are eligible and for Back@Home services.

If you appear to be eligible, your basic information may be entered into a database known as the Homeless Management Information System, or HMIS.

Other agencies that use this system can see basic information about you such as your Name, Date of Birth, Gender, and Veteran status.

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