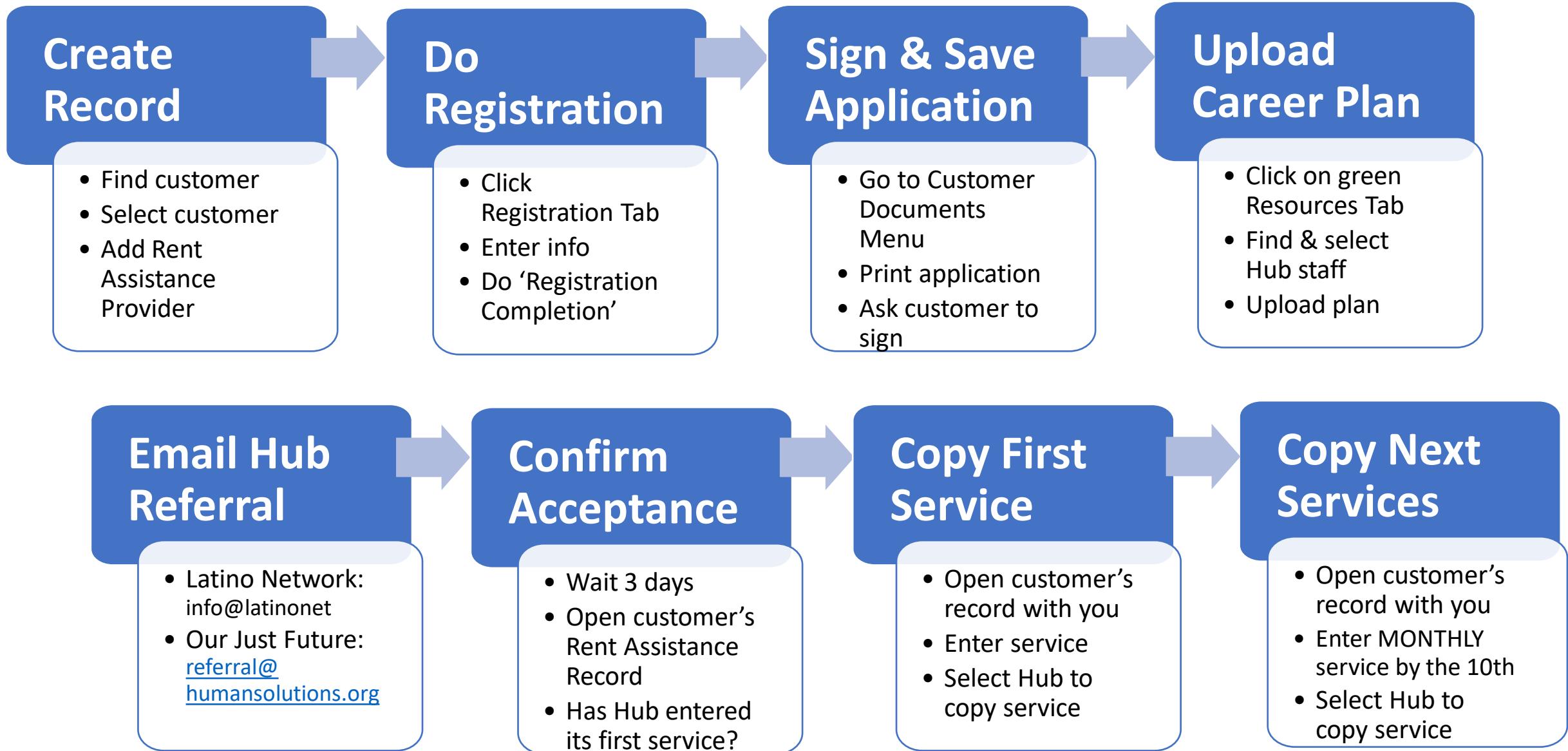


ITrac Data Entry for Staff Who Refer to Rent Assistance Hub





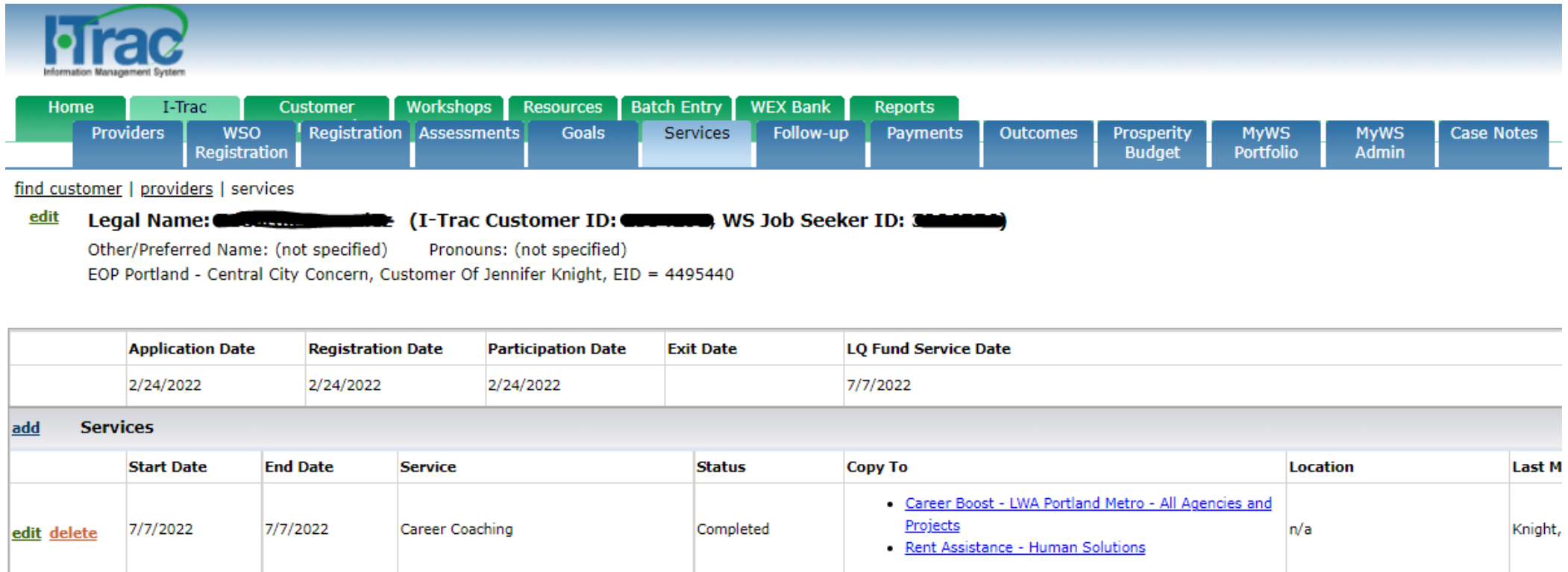
TEN STEPS

1. Serve your customer and ENTER SERVICES.
2. Decide if your customer needs Rapid Rehousing or Homeless Prevention.
3. Create the ITrac Rent Assistance Record.
4. Complete data entry on the Registration tab.
5. Sign & save Application (located on Customer Documents Menu).
6. Upload the Career Plan via ITrac File Exchange.
7. Email your Rent Assistance Hub.
8. Wait three business days.
9. Look in the Rent Assistance record to see if Hub has 1) accepted the referral and 2) entered the Hub's first service.
- 10. COPY THE SERVICES TO THE NEW RENT ASSISTANCE RECORD!**

Questions? Refer to ITrac Rent Assistance Data Entry Guide.
Then, if needed, contact Jennifer Fox 503-936-7050.

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

1. Serve your customer and ENTER SERVICES.



The screenshot displays the ITrac Information Management System interface. At the top, the ITrac logo is visible. Below it is a navigation menu with tabs for Home, I-Trac, Customer, Workshops, Resources, Batch Entry, WEX Bank, and Reports. Under the Customer tab, there are sub-tabs for Providers, WSO Registration, Registration, Assessments, Goals, Services (which is currently selected), Follow-up, Payments, Outcomes, Prosperity Budget, MyWS Portfolio, MyWS Admin, and Case Notes. Below the navigation menu, there are links for 'find customer', 'providers', and 'services'. The main content area shows customer details: 'Legal Name: [REDACTED] (I-Trac Customer ID: [REDACTED], WS Job Seeker ID: [REDACTED])', 'Other/Preferred Name: (not specified)', 'Pronouns: (not specified)', and 'EOP Portland - Central City Concern, Customer Of Jennifer Knight, EID = 4495440'. Below this is a table with columns: Application Date, Registration Date, Participation Date, Exit Date, and LQ Fund Service Date. The table contains one row with dates: 2/24/2022, 2/24/2022, 2/24/2022, and 7/7/2022. Below the table is a section for 'Services' with an 'add' link. It contains a table with columns: Start Date, End Date, Service, Status, Copy To, Location, and Last M. The table contains one row for 'Career Coaching' with a status of 'Completed'. The 'Copy To' field lists 'Career Boost - LWA Portland Metro - All Agencies and Projects' and 'Rent Assistance - Human Solutions'. The 'Location' is 'n/a' and the 'Last M' is 'Knight,'.

[edit](#) Legal Name: [REDACTED] (I-Trac Customer ID: [REDACTED], WS Job Seeker ID: [REDACTED])
Other/Preferred Name: (not specified) Pronouns: (not specified)
EOP Portland - Central City Concern, Customer Of Jennifer Knight, EID = 4495440

	Application Date	Registration Date	Participation Date	Exit Date	LQ Fund Service Date
	2/24/2022	2/24/2022	2/24/2022		7/7/2022

[add](#) Services

	Start Date	End Date	Service	Status	Copy To	Location	Last M
edit delete	7/7/2022	7/7/2022	Career Coaching	Completed	<ul style="list-style-type: none">Career Boost - LWA Portland Metro - All Agencies and ProjectsRent Assistance - Human Solutions	n/a	Knight,

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

2. Decide if your customer needs Rapid ReHousing or Homeless Prevention.

Rapid ReHousing

- Customer currently experiencing homelessness or fleeing domestic violence.
- Helps people obtain housing quickly
- Provides short-term rental assistance and career coaching services

Homeless Prevention

- Customer currently has a house or lives in an apartment.
- Helps people stay housed
- Provides short-term rental assistance and career coaching services

I-Trac Data Entry for Staff Who Refer to Rent Assistance Hub

3. Create the I-Trac Rent Assistance Record.

Find the participant in I-Trac.

Using *Find Customer*, search for the participant record by Name, I-Trac Customer ID or WS Job Seeker ID and click *Select*. Confirm Birth MM/DD and Last 4 SSN (if available) that show to verify that you are selecting the correct participant in I-Trac.

Find a Customer:							
Last Name	First Name	I-Trac Customer ID	WS Job Seeker ID				
test	testr2						
Search Results / Add Customer:							
Last Name	First Name	MI	Birth MM/DD	Last 4 SSN	I-Trac CustomerID	WS JobSeekerID	Recent Fund Activity
Test	Testr2		01/01	REFUSED	1993908	2587682	HCNW, Housing Works, BTW03, Re

On the Providers Tab, click *add* in Providers Control to add the Rent Assistance enrollment record.

- Service Provider = Rent Assistance- Choose the HUB provider you are referring the participant to for rent assistance.
- Customer Of = Choose Your Name. **Keep the Customer Of name as the Career Coach making the referral, do not change to be a specific HUB staff.**
- Application Date = The date the customer is completing the registration process (NOTE: This date must be before the date of the first Rent Assistance grant funded service).

Providers | Documentation

[find customer](#) | [providers](#)

[edit](#) **Legal Name: Kari8 Test (I-Trac Customer ID: 2566365, WS Job Seeker ID: 413**
Other/Preferred Name: (not specified) Pronouns: (not specified)

add	Service Provider	Customer Of
select	WorkSource Adult - LWA Portland Metro - WSPM B-H	Mendez Zepeda, Jose
select	L... NextGen - Centro Cultural	Mendez Zepeda, Jose
select	Rent Assistance - Latino Network	Brenk, Kari

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

4. Complete data entry on the Registration tab – enter data.

Review fields that may auto-import:

- Address Phones Email Address Ethnicity Race Other Demographics
- Employment Characteristics- *To be eligible must be Homeless or Housing Insecure*
- Employment Status Public Assistance

Complete these fields:

- **Co-enrollment**- choose from the dropdown other programs the participant is actively enrolled in. *This is important to complete as it filters into reports.*
- **Six Month Income**- complete for current income
- **Other Rent Assistance Information**
 - Adults in Household
 - Children in Household
 - Source of Income
 - Amount Requested- **Enter the monthly amount of rent requested**
 - Months Needed
 - Housing Type at Registration – Choose Rapid Re-Housing or Homeless Prevention as defined in the Rent Assistance Regional Program Standards
- **Registration Notes**

Other Rent Assistance Information

Adults in Household	Children in Household	Amount Requested	Months Needed	Housing Type at Registration
		\$0.00		Rapid Rehousing
Plan to pay rent at end of Rent Assistance		Source of Income		

Registration Notes

Registration Notes
customer is enroll with Mcjrp program

Registration Results

Missing Information

(All required registration information has been entered)

REGISTRATION NOTES FIELD

EXAMPLE OF WHAT TO INCLUDE

Participant is at risk of homelessness because he has rec'd an eviction notice. He needs 4 months of rent assistance for August \$800; Sept \$800; Oct \$400; and Nov \$300. Right now, I am helping them enroll in a truck driving training.

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

4. Complete data entry on the Registration tab – verify.

Registration Results Control will tell you what information is missing or any ineligible reasons. If no *Ineligible Reasons* are listed the **Career Coach completes the Registration Completion Control for Registered By. The Reviewed By is completed by the HUB staff.**

Registration Results				
Missing Information			Ineligible Reasons	
Income Information				
Registration Completion				
Application Date	Registered By	Review Date	Reviewed By	
4/1/2021	Schaeffer-Bisht, Blair	4/1/2021	Schaeffer-Bisht, Blair	

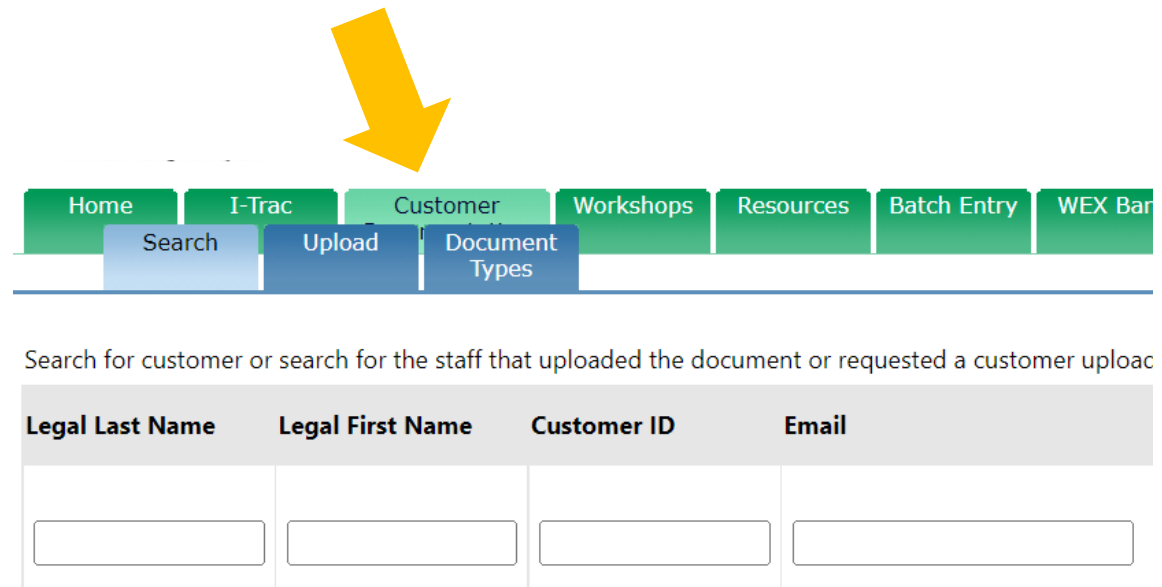
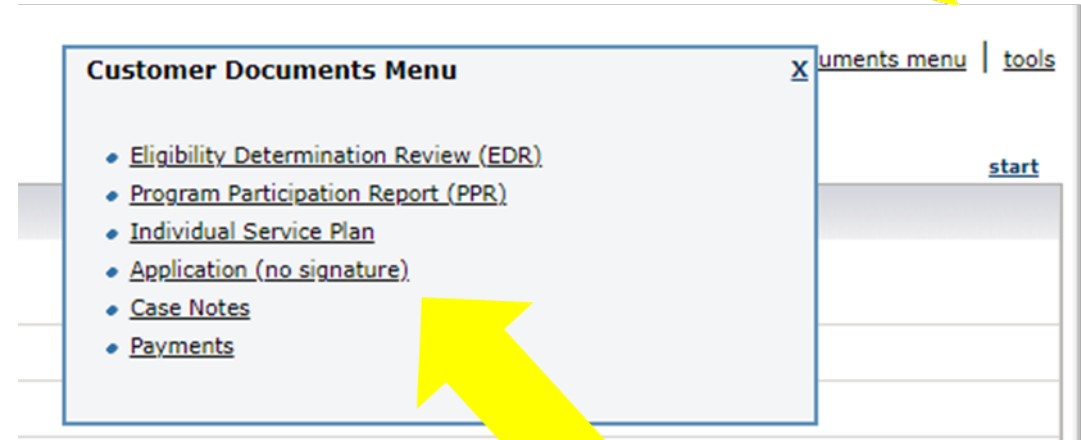
ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

5. Sign & Save Application

- a) Open the application, located on Customer Documents Menu.
- b) Print the application.
- c) Ask customer to sign it.

Customer Data		
Service Provider	Rent Assistance / Human Solutions	
Customer ID	[REDACTED]	
Legal Name	[REDACTED]	
Preferred Name	(not specified)	
Pronouns	(not specified)	
DOB	4/5/[REDACTED]	
Sex	[REDACTED]	
Gender	[REDACTED]	
SSN 4	[REDACTED]	
Application Date/Referral Date	Participation Date/Referral Accepted Date	Custom Coach
12/6/2021	1/4/2022	GAY, TRI

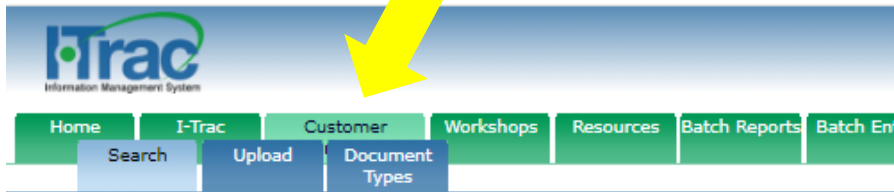
- d) Upload signed application into ITrac using the Document Upload Tool.



ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

6. Upload the Career Plan via green Customer Documentation Tab.

- Save the Career Plan as a PDF, JPEG or PNG. ITrac supports only these three file types.
- Locate the customer on the green Customer Documentation Tab.
- Click the blue "Upload" button next to the customer's name.
- Follow the prompts to upload the Career Plan. The Career Plan is called "Individual Plan" in ITrac.



Search for customer or search for the staff that uploaded the document or requested a customer upload

Legal Last Name	Legal First Name	Customer ID	Email
<input type="text"/>	<input type="text"/>	<input type="text" value="2479165"/>	<input type="text"/>

[hide all documents](#)

	Customer Name	Customer ID	Birth MM/DD	Recent Fund
<input type="button" value="upload"/> <input type="button" value="hide"/>	Kari Test3	2479165	11/25	WorkSource



I-Trac Secure Document Upload

Customer Name

Kari Test3

I-Trac Customer ID

2479165

Select how you are uploading the document.

- Staff Upload - Upload document from this device
- Staff Upload - Upload document from another device
- Customer Upload - Send request to customer for upload

Select document type.

Individual Plan

NEXT >

CANCEL

ITrac Data Entry for Staff Who Refer to Hub

7. Email your assigned Rent Assistance Hub:

- Latino Network - housinghubreferrals@latnet.org
- Our Just Future - referral@ourjustfuture.org

SAMPLE - Referral email

Hi!

I am referring I-Trac # _____ for rent assistance. I completed the referral process in I-Trac and uploaded a career plan via I-Trac file exchange.

(Insert career coach name)

(Partner Agency name)

WHO REFERS WHERE

Latino Network

- AHFE - IRCO
- AHFE - POIC

Our Just Future (aka Human Solutions)

- AHFE - Central City Concern
- AHFE – Our Just Future
- EOP DCJ – All
- EOP Portland – All

Please Note

The Hub's Family Advocate/Coordinator will notify Career Coach when the Hub service has been entered. In turn, the Career Coach will notify the assigned Family Advocate/Coordinator when a service has been copied in ITrac for the Hub to move forward with contacting participant for an intake.

ITrac Data Entry for Staff Who Refer to Hub

8. Wait three business days.
9. Look in the Rent Assistance record to see if HUB has 1) **accepted the referral** and 2) entered the Hub's first service.

ITrac
Information Management System

Home | I-Trac | Customer | Workshops | Resources | Batch Entry | WEX Bank | Reports
Providers | Registration | Services | Payments | Outcomes | MyWS Portfolio | MyWS Admin | Case Notes

[find customer](#) | [providers](#) | [registration](#)

[edit](#) **Legal Name:** Eduardo Gonzalez (I-Trac Customer ID: [REDACTED], WS Job Seeker ID: 3200742)
Other/Preferred Name: (not specified) Pronouns: (not specified)
Rent Assistance - Human Solutions, Customer Of Jennifer Knight, EID = 4507950

[edit](#) TC told TW she was born as a male but has been transitioned to female and changed her name from Eduardo to Vanessa. Jennifer Knight, HES

Registration Results	
Missing Information	Ineligible Reasons
(All required registration information has been entered)	(Eligible)

[edit](#) **Registration Completion**

Application Date	Registered By	Review Date	Reviewed By
2/24/2022	Knight, Jennifer	3/7/2022	Veals, Johnnai

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

8. Wait three business days.
9. Look in the Rent Assistance record to see if HUB has 1) accepted the referral and 2) entered the Hub's first service.

The screenshot displays the ITrac Information Management System interface. At the top, there is a navigation menu with tabs for Home, I-Trac, Customer, Workshops, Resources, Batch Entry, WEX Bank, and Reports. Below this, there are sub-tabs for Providers, Registration, Services, Payments, Outcomes, MyWS Portfolio, MyWS Admin, and Case Notes. The main content area shows a customer record for a person with a legal name of [REDACTED] (I-Trac Customer ID: [REDACTED], WS Job Seeker ID: [REDACTED]). The record includes fields for Other/Preferred Name, Pronouns, and Rent Assistance - Human Solutions, Customer Of Johnnai Veals, EID = 4539964.

Below the customer information, there are two tables. The first table is titled "Current Housing Status" and has columns for Start Date, End Date, Status, and Last Modified By. It contains one entry for "Housed" on 8/1/2022, modified by Johnnai Veals.

The second table is titled "Services" and has columns for Start Date, End Date, Service, Status, Copied From, Location, Last Modified By, and Date Modified. It contains three entries:

Start Date	End Date	Service	Status	Copied From	Location	Last Modified By	Date Modified
8/9/2022	8/9/2022	Career and Resource Planning	Completed	• EOP Portland - WSPM SE - PREP	n/a	Moody, Kayla	8/9/2022
8/1/2022	8/1/2022	Homeless Prevention (HUB)	Completed		n/a	Veals, Johnnai	8/9/2022
7/22/2022	7/22/2022	Career and Resource Planning	Completed	• EOP Portland - WSPM SE - PREP	n/a	Moody, Kayla	7/28/2022

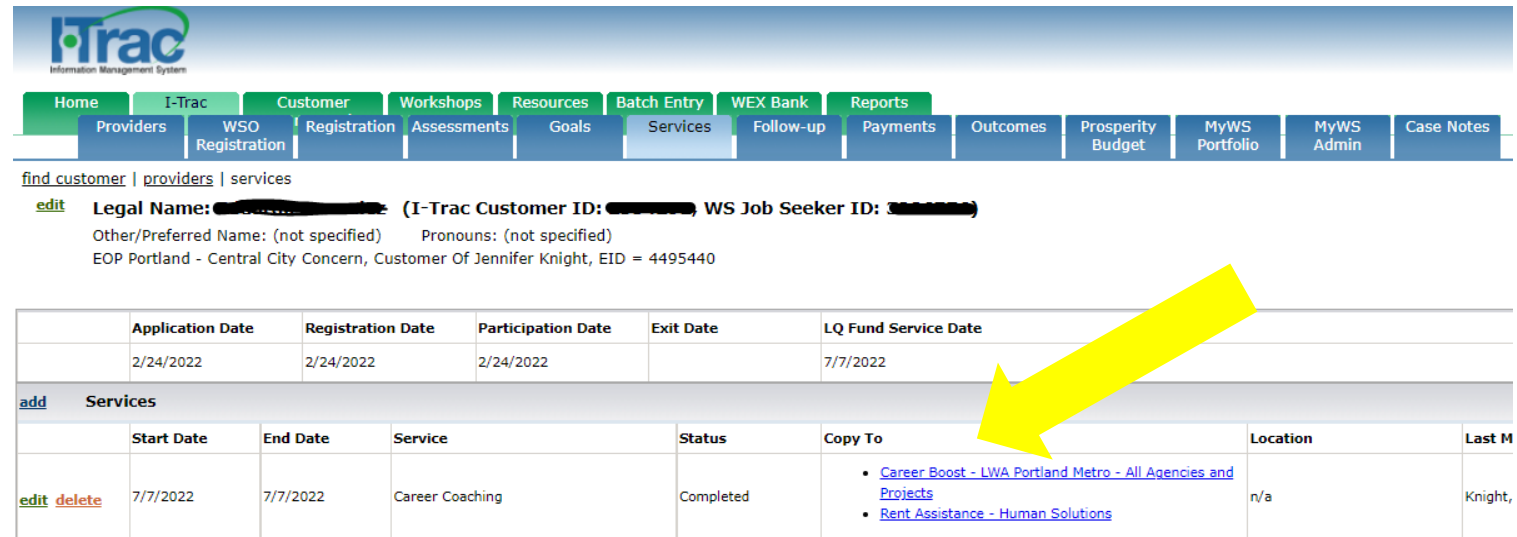
The "Homeless Prevention (HUB)" service entry is circled in red, and a yellow arrow points to it from the right side of the screen.

Below the services table, there is a "Service Match" table with columns for Service and Match For Fund.

ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

10. COPY THE SERVICES TO THE NEW RENT ASSISTANCE RECORD!

To be referred to and receive rent assistance, participants must be engaged with their Career Coach in each month that the participant is receiving rent assistance as defined in the *Rent Assistance Regional Program Standards*. Service engagement must be entered by the 10th day of each month in each month the participant is searching for rent assistance, and then each subsequent month that rent assistance is received until rent assistance ends. The Hub can't pay rent without verifying engagement! Engagement is verified for the current month and rent is paid in the current month for the next month.



The screenshot displays the ITrac Information Management System interface. The top navigation bar includes links for Home, I-Trac, Customer, Workshops, Resources, Batch Entry, WEX Bank, and Reports. Below this, a secondary navigation bar contains links for Providers, WSO Registration, Registration, Assessments, Goals, Services, Follow-up, Payments, Outcomes, Prosperity Budget, MyWS Portfolio, MyWS Admin, and Case Notes. The main content area shows a customer record with the following details:

- Legal Name: [REDACTED] (I-Trac Customer ID: [REDACTED], WS Job Seeker ID: [REDACTED])
- Other/Preferred Name: (not specified) Pronouns: (not specified)
- EOP Portland - Central City Concern, Customer Of Jennifer Knight, EID = 4495440

Below the customer record is a table with the following columns: Application Date, Registration Date, Participation Date, Exit Date, and LQ Fund Service Date. The data row shows: Application Date: 2/24/2022, Registration Date: 2/24/2022, Participation Date: 2/24/2022, Exit Date: [REDACTED], LQ Fund Service Date: 7/7/2022.

Below the table is a section for Services. The table has the following columns: Start Date, End Date, Service, Status, Copy To, Location, and Last M. The data row shows: Start Date: 7/7/2022, End Date: 7/7/2022, Service: Career Coaching, Status: Completed, Copy To:

- Career Boost - LWA Portland Metro - All Agencies and Projects
- Rent Assistance - Human Solutions

, Location: n/a, Last M: Knight,.

A yellow arrow points to the 'Copy To' column in the Services table.



**Do you have questions about ITrac data entry in the Rent Assistance fund?
Would you like a training for your agency?**

Contact Jennifer or Ernesta!

Jennifer Fox || jfox@worksystems.org

Ernesta Ingeleviciute || eingeleviciute@worksystems.org

**Want to learn more about how each Rent Assistance Hub processes referrals?
Schedule an orientation!**

Latino Network: Angelica Delima || angelica@latnet.org

Our Just Future: Sonja Arigbon || referral@ourjustfuture.org