ITrac Data Entry for Staff Who Refer to Rent Assistance Hub

ITrac Data Entry for Staff Who Refer to Hub

Create Record
- Find customer
- Select customer
- Add Rent Assistance Provider

Do Registration
- Click Registration Tab
- Enter info
- Do 'Registration Completion'

Sign & Save Application
- Go to Customer Documents Menu
- Print application
- Ask customer to sign

Upload Career Plan
- Click on green Resources Tab
- Find & select Hub staff
- Upload plan

Email Hub Referral
- Latino Network: info@latinonet
- Our Just Future: referral@humansolutions.org

Confirm Acceptance
- Wait 3 days
- Open customer's Rent Assistance Record
- Has Hub entered its first service?

Copy First Service
- Open customer's record with you
- Enter service
- Select Hub to copy service

Copy Next Services
- Open customer's record with you
- Enter MONTHLY service by the 10th
- Select Hub to copy service

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.

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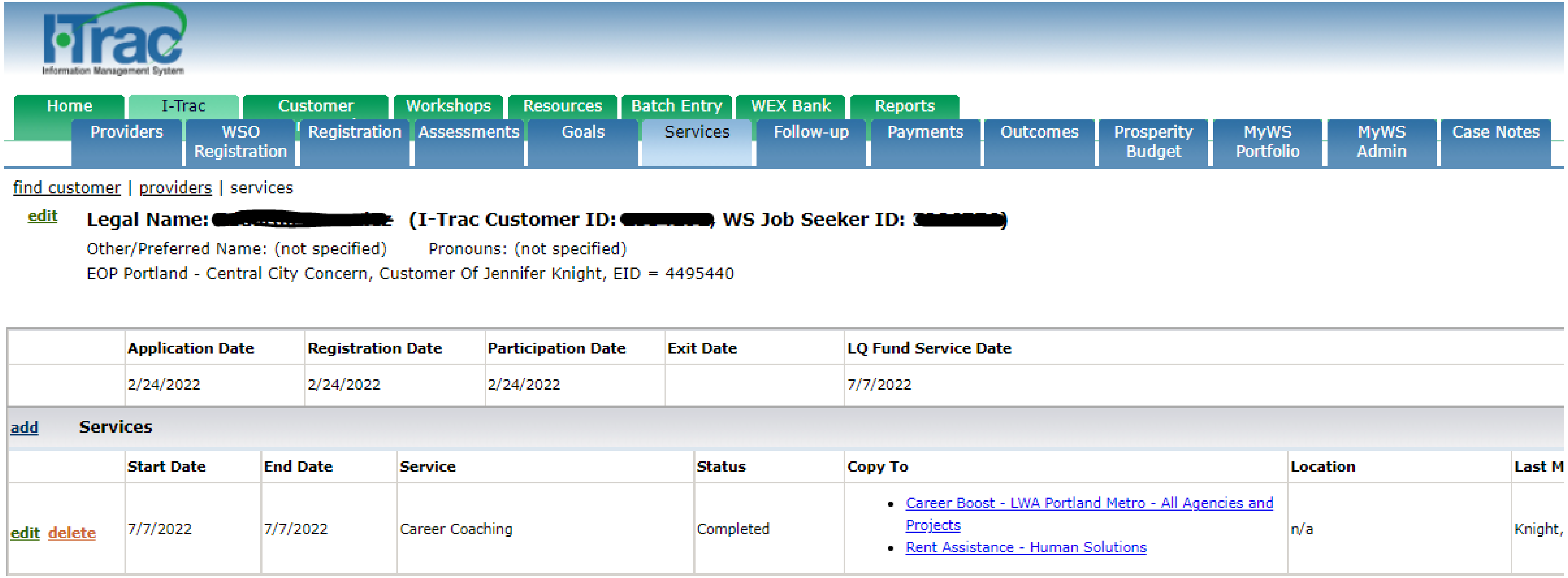
1. Serve your customer and ENTER SERVICES.



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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

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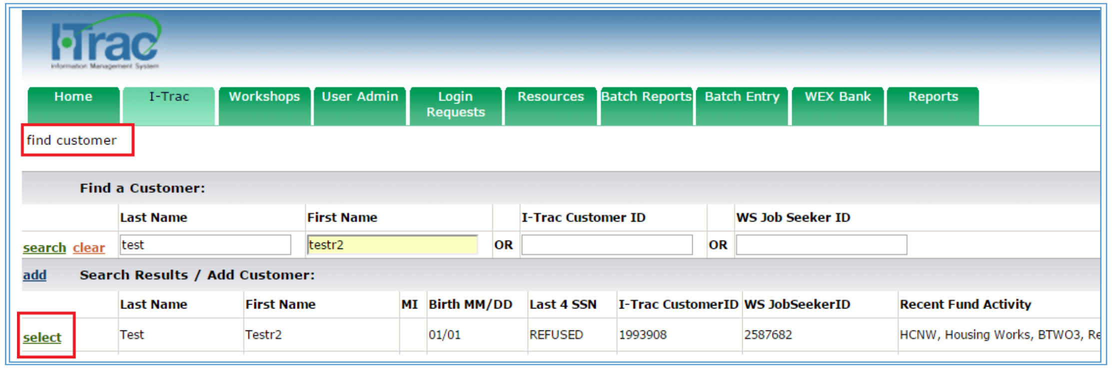
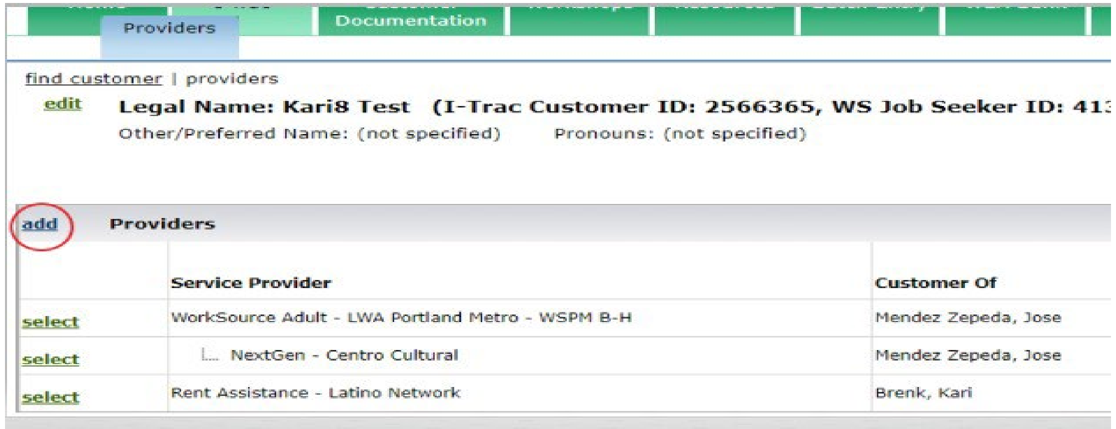
3. Create the ITrac Rent Assistance Record.

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.



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).



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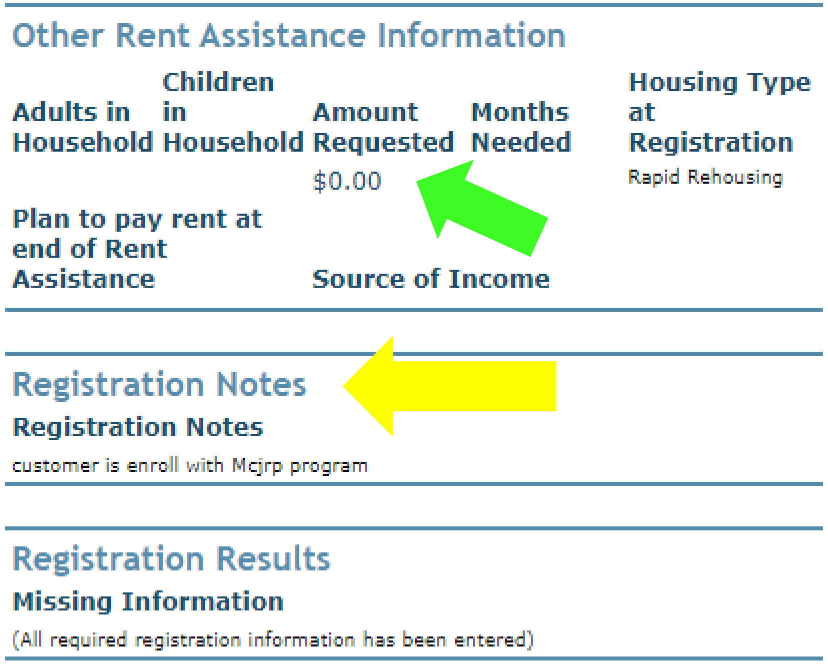
4. Complete data entry on the Registration tab – enter data.

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**



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.

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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	

edit **Registration Completion**

Application Date	Registered By	Review Date	Reviewed By
4/1/2021	Schaeffer-Bisht, Blair	4/1/2021	Schaeffer-Bisht, Blair

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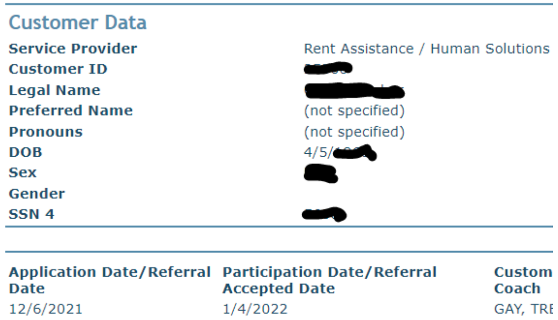
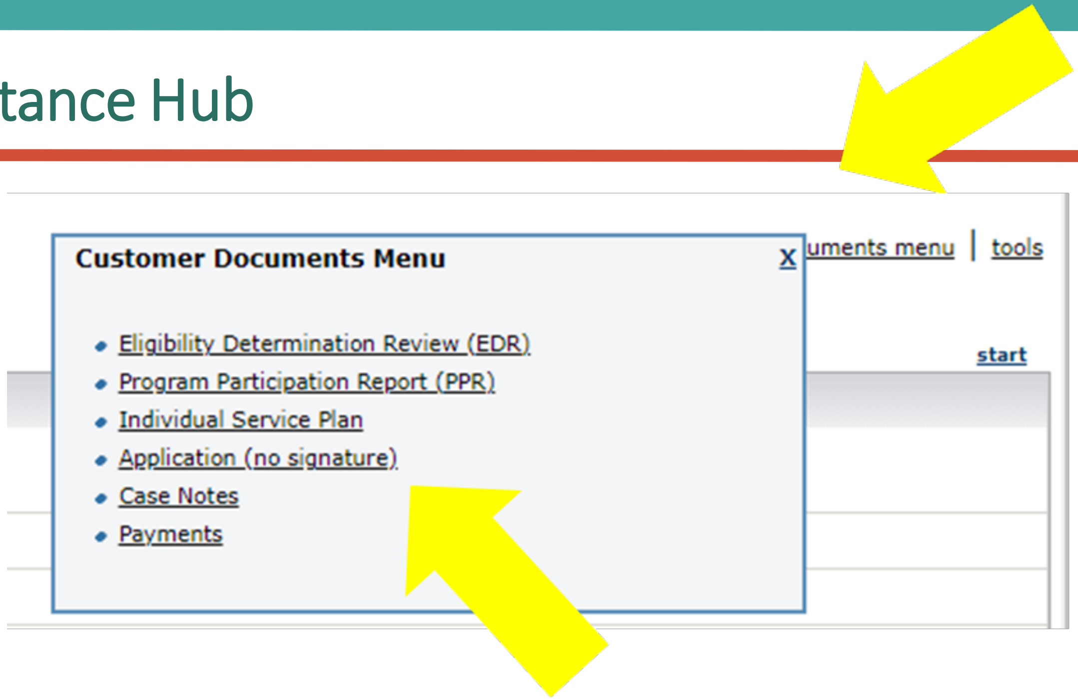
5. Sign & Save Application

a) Open the application, located on Customer Documents Menu.

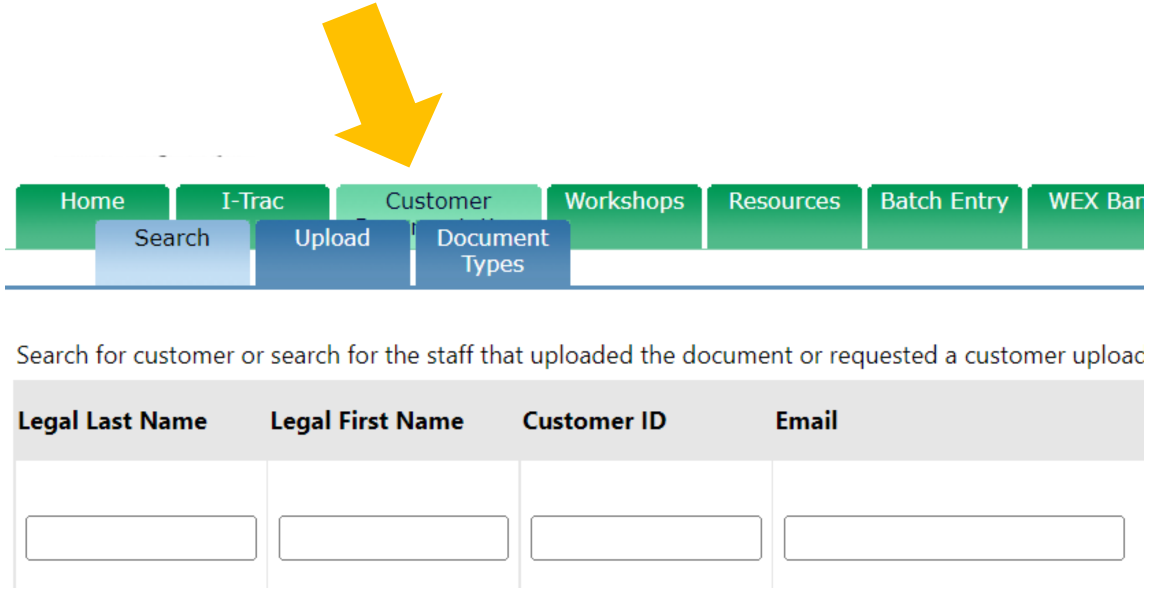
b) Print the application.

c) Ask customer to sign it.



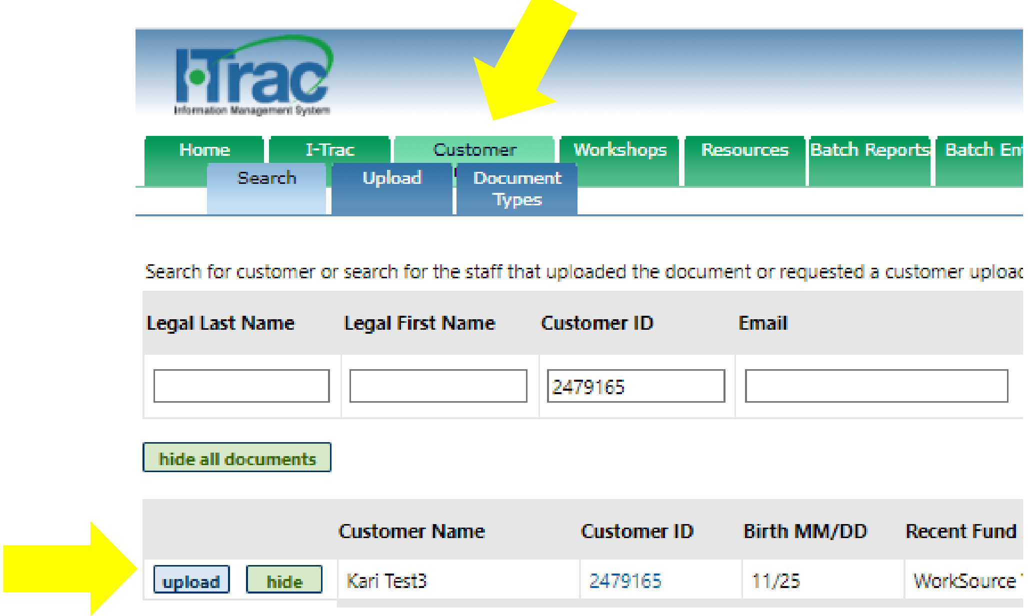


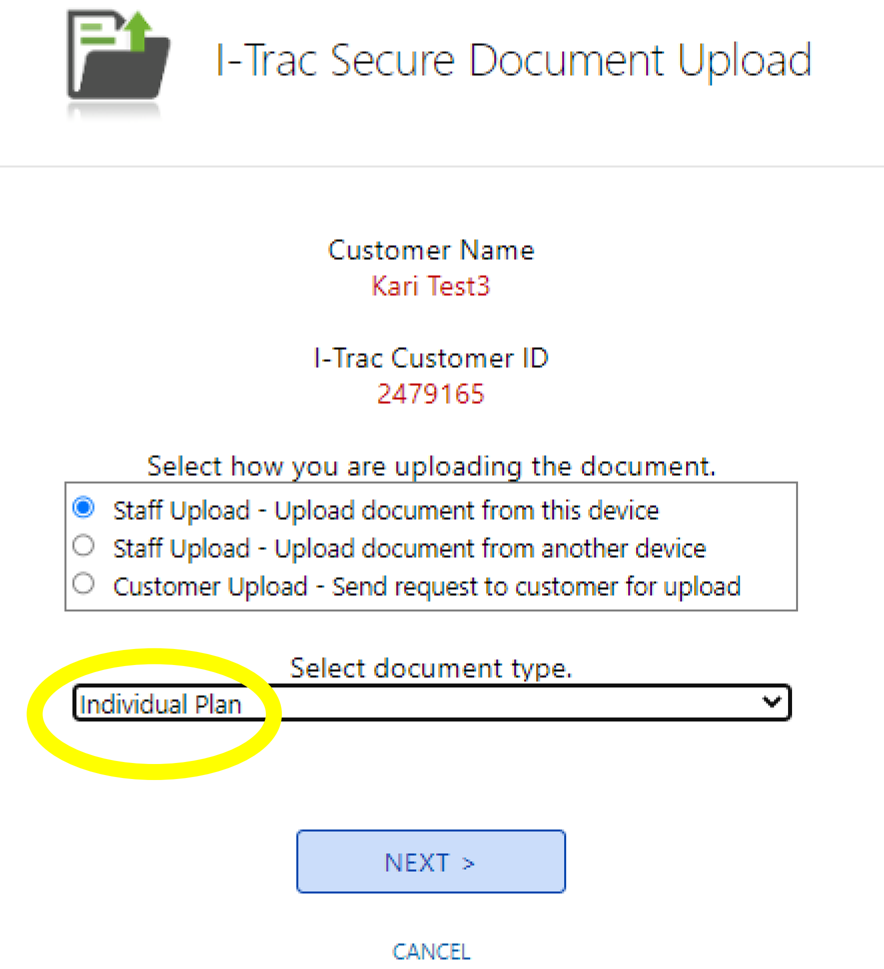
d) Upload signed application into ITrac using the Document Upload Tool.



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

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





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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.

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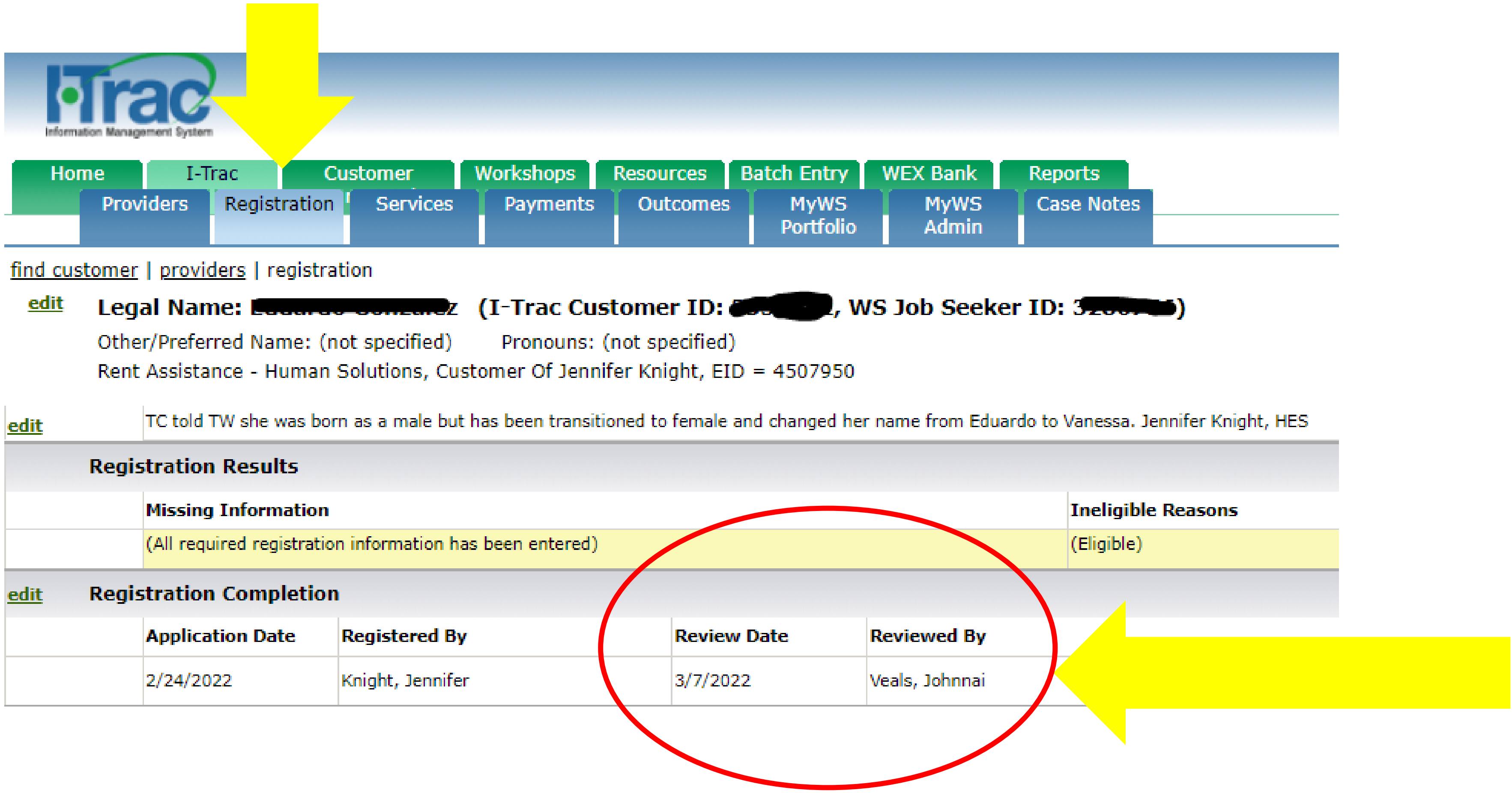
8. **Wait three business days.**
9. **Look in the Rent Assistance record to see if HUB has 1) accepted the referral and 2) entered the Hub's first service.**



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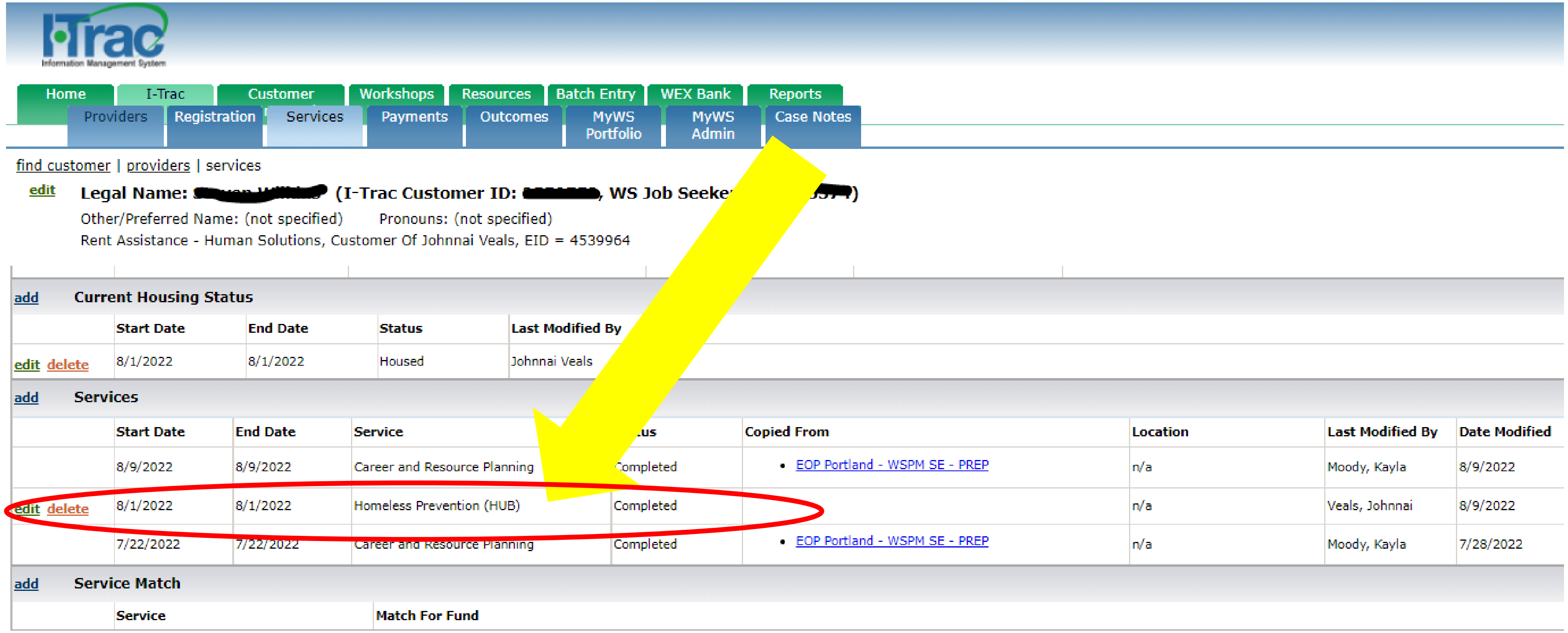

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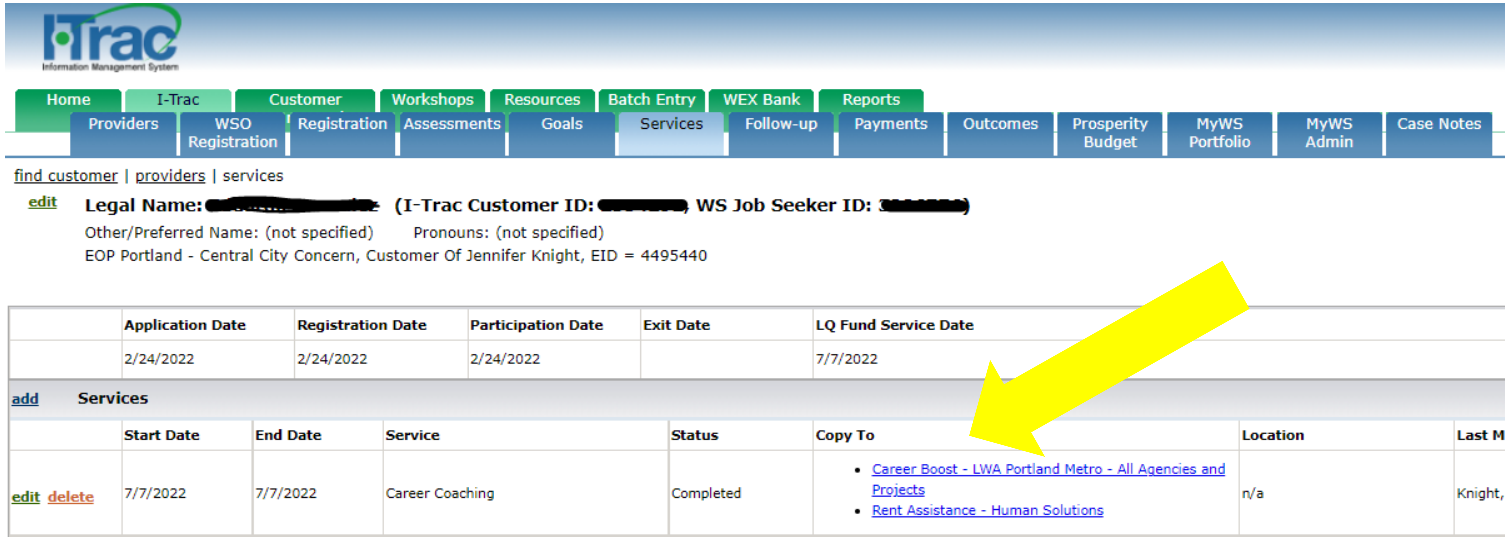
10. COPY THE SERVICES TO THE NEW RENT ASSISTANCE RECORD!

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.



ITrac Data Entry for Staff Who Refer to Hub

TIMELINE

Create Record
- Day 1
- EXAMPLE: Monday

Do Registration
- Day 1
- Monday

Sign & Save Application
- Day 1
- Monday

Upload Career Plan
- Day 1 Monday

Email Hub Referral
- Day 1
- Monday

Confirm Acceptance
- Day 5
- Friday
- *Hub has 3 business days.*

Copy First Service
- Day 8
- Next Monday

Copy Next Services
- Each month
- Before the 10th

QUESTIONS? MORE TRAINING?

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