

ITrac Data Entry for Staff Who Refer to Rent Assistance Hubs



- Review Process
- Highlight one change for PY2024



TEN STEPS

1. Serve your customer and ENTER SERVICES.
2. Decide if your customer is eligible and needs Rapid Rehousing or Homeless Prevention.
3. Create the ITrac Rent Assistance Record.
4. Complete data entry on the Registration tab. **Note need.**
5. Sign & save Application (located on Customer Documents Menu).
6. Upload the Career Plan using green Customer Documentation Tab.
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 or contact Jennifer Fox 503-936-7050.

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

1. Serve your customer and ENTER SERVICES.

The screenshot displays the I-Trac 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, a secondary menu includes Providers, WSO Registration, Registration, Assessments, Goals, Services (highlighted), Follow-up, Payments, Outcomes, Prosperity Budget, MyWS Portfolio, MyWS Admin, and Case Notes.

Below the navigation, there are links for [find customer](#), [providers](#), and [services](#). The main content area shows a customer profile 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 profile information 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	Registration Date	Participation Date	Exit Date	LQ Fund Service Date
2/24/2022	2/24/2022	2/24/2022		7/7/2022

Below the table is a section for **Services** with an [add](#) link. The services table has the following columns: Start Date, End Date, Service, Status, Copy To, Location, and Last M. The data row shows:

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

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2. Decide if your customer is eligible and needs Rapid Rehousing or Homeless Prevention.

Eligibility

- Most EOP customers are eligible
- They meet enrollment, housing status, income and residency requirements.
- Refer to the Rent Assistance Regional Program Standards for guidance.

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

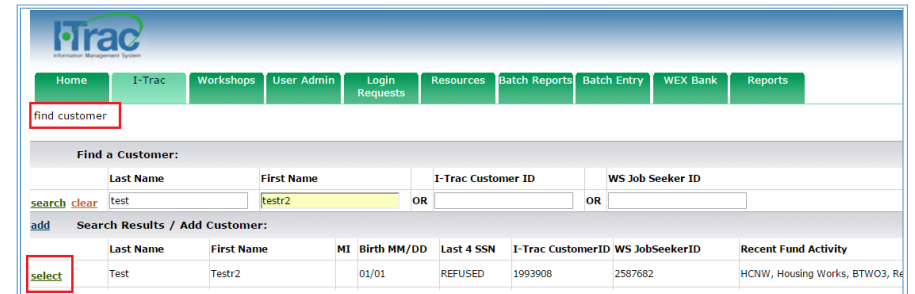
- Customer currently has a house or lives in an apartment.
- Helps people stay housed
- Provides short-term rental assistance and career coaching services

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3. Create the ITrac Rent Assistance Record.

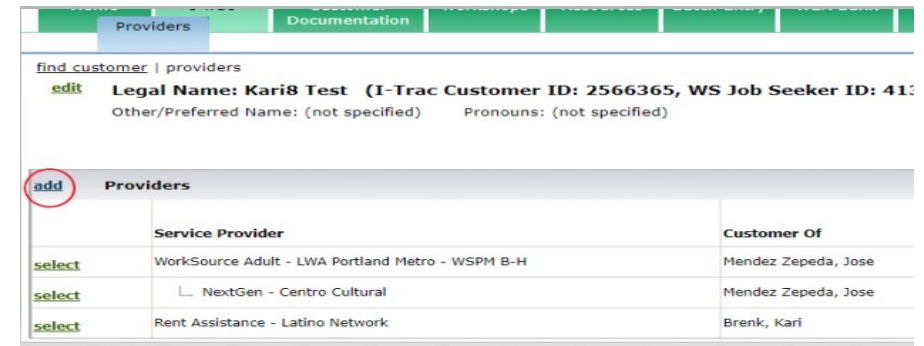
Find the participant in I-Trac.

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:

- **Other Funding Source**- 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** – All fields in this control are required. Enter the total desired rent assistance here and the monthly rent amount in the Registration Notes.

Other Funding Source								
Date	Funding Source			Notes				
11/30/2023	Our Just Future-EOP Portland							

Six Month Income					
Household Size	Household Income	50% MFI Max	Income Status	Income Documentation	
8	\$8,916.00	\$37,224.00	Low-income	Customer Attestation	

Other Rent Assistance Information								
Adults in Household	Children in Household	Total Amount Requested	Months Needed	Housing Type at Registration	Past Property Debt	Past Property Debt Details	Credit Debt	Credit Debt Details
1	7	\$3,238.00	3	Homeless Prevention	No		No	
Plan to pay rent at end of Rent Assistance		Source of Income			Eviction History	Eviction History Details	Criminal History	Criminal History Details
With earned income and job increasing hours		Work			Yes	Five years ago received an eviction	No	

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

Provide details about your participant's case. Detailed info helps the hub serve your participant quicker.

- Include how participant will pay rent when assistance ends.
- **NEW for PY2024** - Indicate documentation of need by listing one of the following:
 - Completion of a Prosperity budget
 - Homelessness
 - Just released from incarceration within the past 90 days
 - Receiving public assistance *including TANF, SNAP, Medicaid/SCHIP/OHP, HUD Housing Choice Voucher (Section 8), Home Energy Assistance (LIHEAP, OEAP, or WAP), Free & Reduced-Price Lunch (School Nutrition Program), WIC Program*
 - Qualifies for a Tri-Met Low-Income Fare Hop Fast pass
 - Unemployed

NOTE

ITrac will be adding "Documentation of Need" as a new field on the Registration tab. The dropdown will list the characteristics so you can select one.

Registration Notes

Registration Notes

Customer needs full rent paid for the month of November






EXAMPLE OF WHAT TO INCLUDE

Participant is at risk of homelessness because he has rec'd an eviction notice. He is on SNAP. He owes \$900 in rent arrears. 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	
(All required registration information has been entered)		(Eligible)	
Registration Completion 			
Application Date 	Registered By 	Review Date 	Reviewed By 
9/20/2023	Porter, Eugenie	9/26/2023	Delima, Angelica

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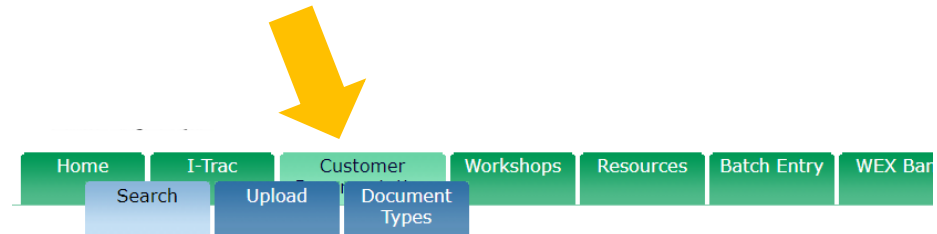
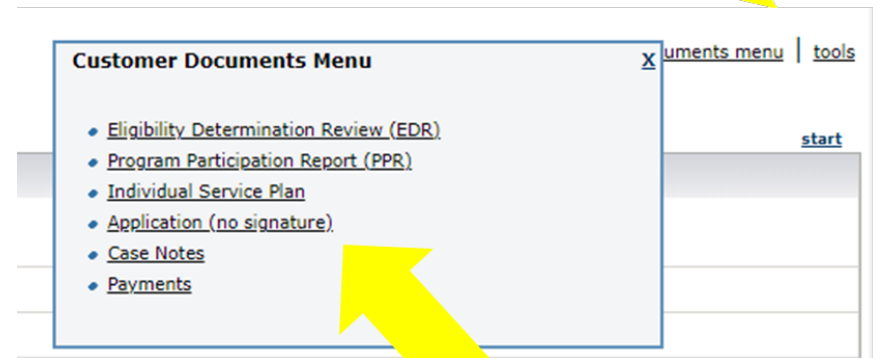
5. Sign & Save Application

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

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.

NOTE: You also can email the customer an application link so they can sign it within 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"/>	<input type="text"/>

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

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

- Save the Career Plan as a PDF, JPEG or PNG. I-Trac 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 I-Trac.



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
		2479165	

[hide all documents](#)

	Customer Name	Customer ID	Birth MM/DD	Recent Fund	
upload	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 Hubs

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, saved a current Prosperity budget and uploaded a career plan to the Customer Documentation tab.

(Insert career coach name)

(Partner Agency name)

WHO REFERS WHERE

Latino Network

- AHFE – IRCO & Latino Network
- EOP DCJ – SE Works
- EOP PDX – IRCO & SE Works

Our Just Future (aka Human Solutions)

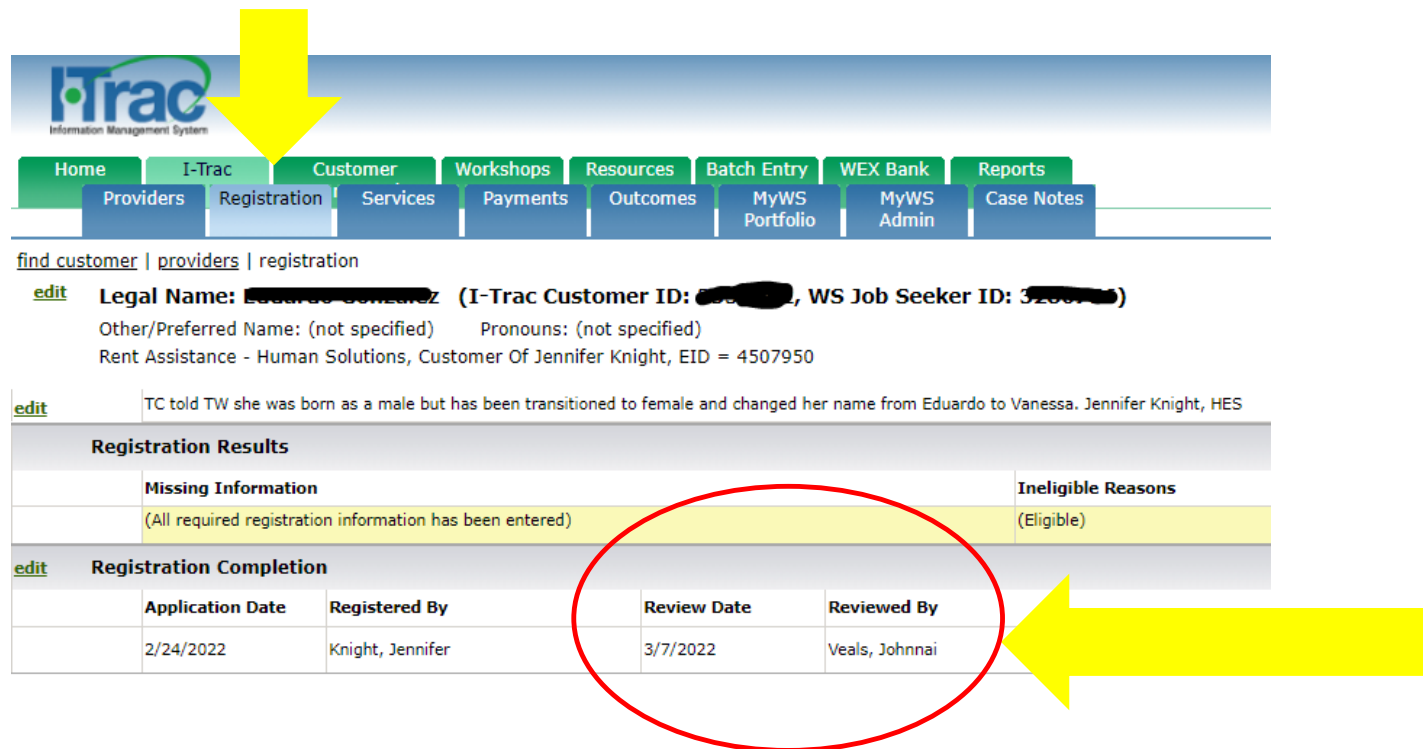
- AHFE – Our Just Future & POIC
- EOP DCJ – Our Just Future
- EOP PDX – Our Just Future
- EOP PDX – Trash for Peace

Please Note

The hub's Family Advocate/Coordinator will notify you when the hub service has been entered. In turn, you will notify the assigned Family Advocate/Coordinator when a service has been copied in ITrac so the hub can 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.



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: [REDACTED])
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

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What the hub's first service will look like..

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](#) | [services](#)

[edit](#) Legal Name: ██████████ (I-Trac Customer ID: ██████████, WS Job Seeker ID: ██████████)
Other/Preferred Name: (not specified) Pronouns: (not specified)
Rent Assistance - Human Solutions, Customer Of Johnnai Veals, EID = 4539964

[add](#) **Current Housing Status**

	Start Date	End Date	Status	Last Modified By
edit delete	8/1/2022	8/1/2022	Housed	Johnnai Veals

[add](#) **Services**

	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
edit delete	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

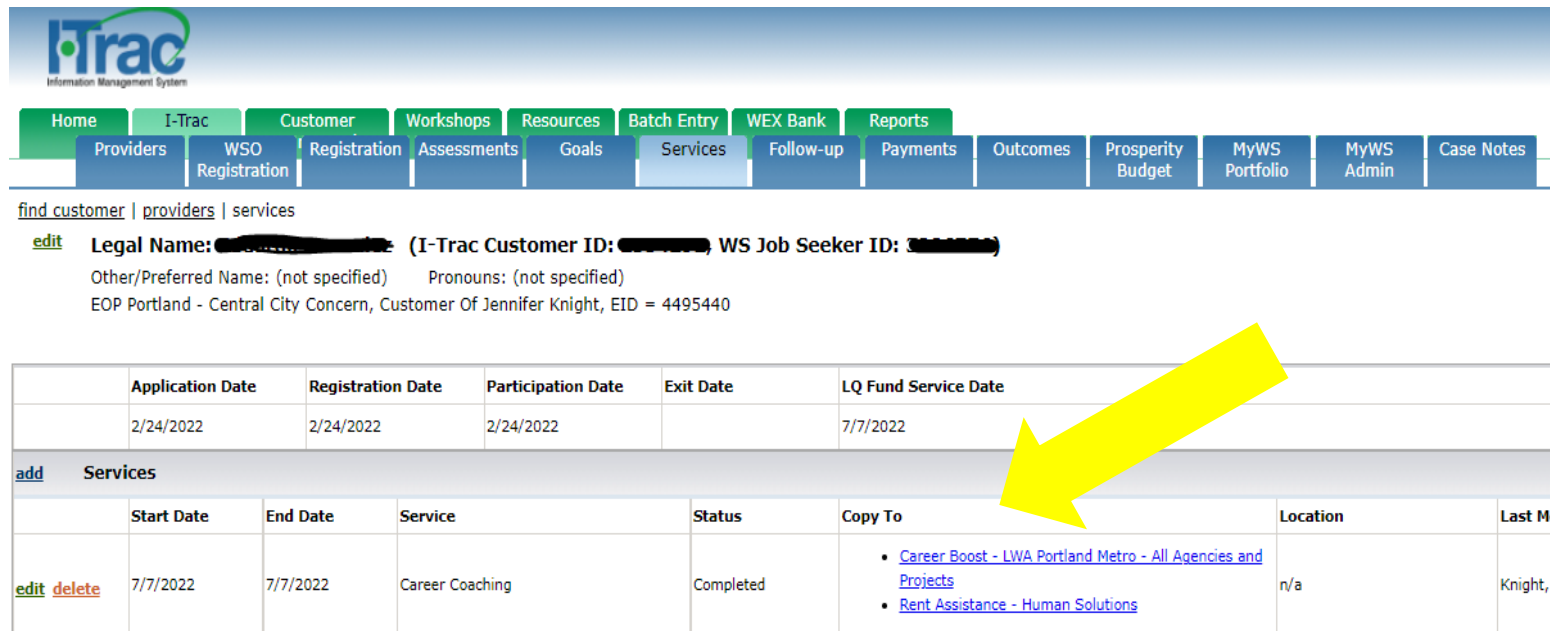
[add](#) **Service Match**

Service	Match For Fund
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ITrac Data Entry for Staff Who Refer to Rent Assistance Hubs

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*. The hub can't pay rent without verifying engagement!



The screenshot displays the ITrac Information Management System interface. The navigation menu includes Home, I-Trac, Customer, Workshops, Resources, Batch Entry, WEX Bank, and Reports. The Customer section is expanded, showing sub-menus for Providers, WSO Registration, Registration, Assessments, Goals, Services, Follow-up, Payments, Outcomes, Prosperity Budget, MyWS Portfolio, MyWS Admin, and Case Notes. The 'Services' sub-menu is selected, and the 'find customer | providers | services' breadcrumb is visible.

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,



**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 || eingleviciute@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: Linda Campa || referral@ourjustfuture.org