OHCS Housing Assistance Service Transaction w/ Fund

OREGON HOUSING & COMMUNITY SERVICES

HOUSING STABILIZATION

Questions??

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Steps

Follow your normal flow:
- Create person/household
- ROI
- Add Entry
- ➕ **SERVICE TRANSACTION with Fund Source**

From the "Summary" tab or the "Service Transaction Dashboard"

- Click "Add Service" *(Multiple is no longer an option ☹)*

- Select Service Provider, Input Start and End Date, Select Service Type

- Click "Save & Continue"

- Expand "Apply Funds for Service"

Services

Start Date	End Date	Provider
Add Service Add Multiple Services		No matches.

Service Provider*	MCCAC-OHCS_EHA-2019-21 - HP (6208)
Creating User	Hunter Belgard
Start Date*	07 / 01 / 2019 8 : 15 : 57 AM
End Date	07 / 31 / 2019 8 : 15 : 57 AM
Service Type*	Rent Payment Assistance (BH-3800.7000) Look Up
Provider Specific Service	-Select-

Save & Continue   Cancel

▶ **Apply Funds for Service**

Expand Apply Funds for Service Panel

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Steps Continued:

- <u>Click</u> "Add Funding Source"

- <u>Select</u> the appropriate Fund Allocation, by <u>clicking</u> the green + sign

- <u>Input</u> "Amount" *(careful not to use "Client Co-Pay)*

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Steps Continued: *Above the Fund Source box…….*

- Click "Search"

- Select the appropriate Vendor, by clicking the green + sign

- Click "Save & Exit"

Canned Reports: *These are TOOL reports, will not be submitted quarterly*

Fund Availability Report

Fund Usage Report

My Managed Funds Report

Fund Availability Report – Money
How much money has been spent by this PROVIDER? Shows all funds.

Fund Usage Report – People
WHO have you spent money on in this ONE fund by this Provider?

My Managed Funds Report – Money
How much money has been spent in ALL my funds?

Client Served – Count of People
Service Transaction – list of services

Client Served Report

Service Transaction

Fund Availability Report

ⓘ Select a Provider to view Funds available to that Provider

Provider * MCCAC-OHCS_EHA-2017-19 - HP (6208)   [Search] [My Provider] [Clear]

[Build Report] [Clear]

Report Results

Fund Name ▲	Submission Deadline	Fund Amount	In Process	Expended	Remaining Balance
🔍 MCCAC EHA - HP	N/A	$550,000.00	$0.00	$3,750.00	$546,250.00

Showing 1-1 of 1

[Refresh]

Fund Usage Report

Fund	MCCAC EHA - HP (269) ▼ [Manage List]
Funding Cycle	(starts 07/24/2019) ▼
Vendor	-Select- ▼ [Manage List]
Provider	MCCAC-OHCS_EHA-2017-19 - HP (6208)
Amount Status	-Select- ▼
Fund Request Status	-Select- / Awaiting Submission / Awaiting Resubmission / Awaiting Approval
Last Action Start Date	07 / 01 / 2019
Last Action End Date	09 / 30 / 2019
Last Action	-Select- / Saved / Submitted / Modified
Has Overrides	-Select- ▼
Report Results Columns	☐ Voucher ID ☐ Check Request ID ☐ Vendor's Client Account Number ☑ Last Action Date ☐ Last Action ☐ Status ☑ Fund ☐ Vendor ☑ Provider ☐ Creating User ☑ Service ☑ Client ID ☑ Client Name ☑ Amount ☐ Support Documentation ☐ Overrides

[Search] [My Provider] [Clear]

[Download]   [Build Report] [Clear]

Report Results

Last Action Date	Fund ▲	Provider	Service	Client ID	Client Name	Amount
🔍 08/08/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rent Payment Assistance	1	Rahadian, Reza	$100.00
🔍 08/28/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rent Payment Assistance	214	Smith, Katie	$650.00
🔍 08/28/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rent Payment Assistance	214	Smith, Katie	$650.00
🔍 08/28/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rental Deposit Assistance	95	Carter, Jimmy	$1,200.00
🔍 08/28/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rent Payment Assistance	95	Carter, Jimmy	$700.00
🔍 08/28/2019	MCCAC EHA - HP	MCCAC-OHCS_EHA-2017-19 - HP (6208)	Rent Payment Assistance	183	fisher, Joe	$450.00

My Managed Funds Report

My Role * ○ Any ◉ Fund Administrator ○ Review Agent
Enabled -Select- ▼

[Build Report] [Clear]

Report Results

	Fund Name ▲	Enabled	Funding Cycle End Date	Fund Amount	In Process	Expended	Remaining Balance
🔍	AMH	Enabled	N/A	N/A	$0.00	$0.00	N/A
🔍	MCCAC EHA - HP	Enabled	N/A	$550,000.00	$0.00	$3,750.00	$546,250.00

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[Refresh]

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ART Report: *This report will be requested Quarterly*

Advanced Reporting Tool

ART Browser

- ▸ 📁 Inbox
- ▸ 📁 Available Reports and Templates
- ▸ 📁 Bowman Systems Resources
- ▾ 📁 Public Folder
  - ▾ 📁 ART Gallery Reports and Resources
    - ▸ 📁 ART Gallery Report Manuals
    - ▾ 📁 ART Gallery Reports

User Prompt Field	Value(s) Selected
EDA Provider:	-Default Provider-
Effective Date:	Day you run the report
Enter Start Date:	Start of Reporting Period
Enter End Date PLUS ONE DAY:	End of Reporting Period PLUS ONE DAY
Select Provider(s) for Report:	EHA or HSP or ERA or SHAP, etc.
Select Funding Source(s) to Include:	Which Fund Source to "cut/slice" the data by

- 0347 - Billing Summary - v3
- 0401 - Client Program History - v
- 0404 - Client Case Plans - v2
- 0405 - SSOM Client Achievement
- 0407 - SSOM Client Progress Rep
- 0408 - Client Living Situation Hist
- 0409 - Client Event History - v11
- 0508 - SSOM Domains at Populat
- 0509 - SSOM Domains at Populat
- 0521 - Prevention Outcomes - v5
- 0550 - Exit Destination Outcomes
- 0551 - Exit Reason Leaving Outco
- 0552 - Goal Outcomes - v4
- 0556 - Client Transition Outcomes - v2
- 0607 - Client and Household Demographics by Funding Stream - v5
- 0628 - HIC Supplement - v10
- 0629 - Housing Inventory Count - v18
- 0630 - Sheltered-Unsheltered PIT 2019 - v23
- 0631 - HUD CoC APR Detail - v24 (Retired 2017.10.13)
- 0635 - NOFA CoC Application Section 2D - v12

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Example: *Pulls all entry/exits HOWEVER then cuts the data by which fund*

User Prompt Field	Value(s) Selected
EDA Provider:	-Default Provider-
Effective Date:	1/18/2020
Enter Start Date:	7/1/2019
Enter End Date PLUS ONE DAY:	1/1/2020
Select Provider(s) for Report:	MCCAC- EHA - HP(4480)
Select Funding Source(s) to Include:	MCCCAC EHA VET DRF HP

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Providers reporting Information	Service Count	Unique Client Count	Client Count
MCCAC- EHA - HP(4480)	11	6	6

Funding Source	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaskan Native	American Indian or Alaska Native and Black or African American	Black or African American and White	Asian and White	American Indian or Alaska Native and White	American Indian or Alaska Native and Black or African American	Other Multi-Race	Missing or Non-HUD	Total Persons
EHA - State Fund	6	0	0	0	0	0	0	0	0	0	0	0	6
TOTALS:	6	0	0	0	0	0	0	0	0	0	0	0	6

Column totals will not equal to the sum of the rows where clients have multiple funding sources.
Row totals will not equal to the sum of the columns in cases where duplicate clients have different race designations.

Household Characteristics of Clients Served By Funding Source								
Funding Source	Household Type			Household Characteristics (Subset of Household Type)				Total of Household Types
	Households without Children	Households with at least One Adult and One Child	Households with Only Children	Households with Female Head	Large Households (>5 members)	Households with Disabled Member	Households that Include a Client Age 62+	
EHA - State Fund	1	1	1	1	0	0	0	3
TOTALS:	1	1	1	1	0	0	0	3

Client Unique Id 6	Client Uid	HH Id	Service Id	Service Code Description	Service Start	Service End	Service Provider	Funding Source
10042015a100v		514218	10174137	Rental Deposit Assistance	5/7/2019	5/7/2019		EHA - State Fund
04291988b635r		514501	10176752	Rental Deposit Assistance	5/7/2019	5/7/2019		EHA - State Fund
		514501	10176758	Rent Payment Assistance	5/7/2019	5/7/2019		EHA - State Fund
n01282019c435		514501	10176753	Rental Deposit Assistance	5/7/2019	5/7/2019		EHA - State Fund
		514501	10176759	Rent Payment Assistance	5/7/2019	5/7/2019		EHA - State Fund
n12022010c623		514501	10176754	Rental Deposit Assistance	5/7/2019	5/7/2019		EHA - State Fund
		514501	10176760	Rent Payment Assistance	5/7/2019	5/7/2019		EHA - State Fund
n10022013h536		514501	10176755	Rental Deposit Assistance	5/7/2019	5/7/2019		EHA - State Fund
		514501	10176761	Rent Payment Assistance	5/7/2019	5/7/2019		EHA - State Fund
02271963j530h			10152309	Rental Deposit Assistance	5/1/2019	5/2/2019		EHA - State Fund
			10152310	Rent Payment Assistance	5/1/2019	5/31/2019		EHA - State Fund