Updated: 10/01/2026

Homeless Services Department

Rapid ReHousing (RRH) Data Entry Handbook

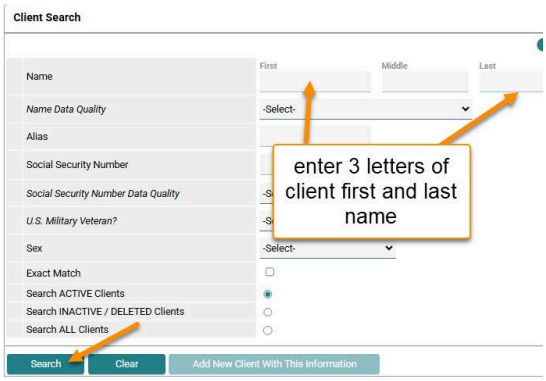
This handbook provides instructions to enrollment and exit participants into and out of a RRH program. Please contact us at hmishelp@multco.us for questions.

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1. Participant Search /Add Participant Process

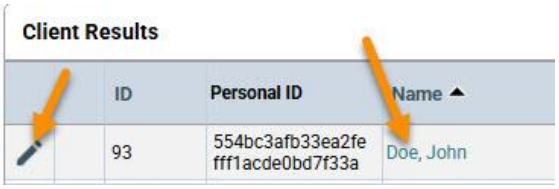
- Click **Clients** from the left hand navigation panel from the homepage.
- Search participants by entering the first three letters of their first name and first three letters of their last name.
- Click **Search.**



NOTE:

- Always check to see if a participant profile already exists before creating a new profile in HMIS. This step reduces the risk of creating duplicate profiles for the person.
- HMIS provides three ways to search, using first/last name, SSN, or participant ID. The preferred method is to use the name field.
- If the participant has multiple last names, search them under each of the last names provided. Search using an alias if applicable.
- In the event you find multiple participant IDs# for a participant, please email them to hmishelp@multco.us.

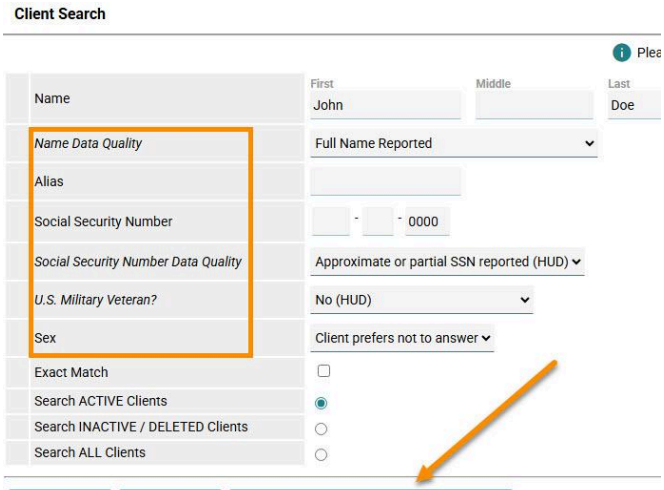
a. If the participant record exists



- **Client Results** displays the participants that match the search criteria.
- Click either the participant name or pencil to open the record.

b. If the participant record does not exist

- If Client Results yields **No Matches**, continue with the Data Quality fields,



then click **Add New participant With This Information.**

Note: *Participants have the right to not provide SSN for the vast majority of programs. Participants may provide the last four digits of their SSN, if they are comfortable doing so. For SSN Data Quality, select "Approximate or partial SSN reported".*

- A pop up will appear - just confirm and click **OK.**
- A new participant record has been created. A new client ID is assigned.

Note: If you need to correct some data fields for example, incorrect spelling of last name, first name change, or veteran status adjustment, click **Client Profile** to do so.

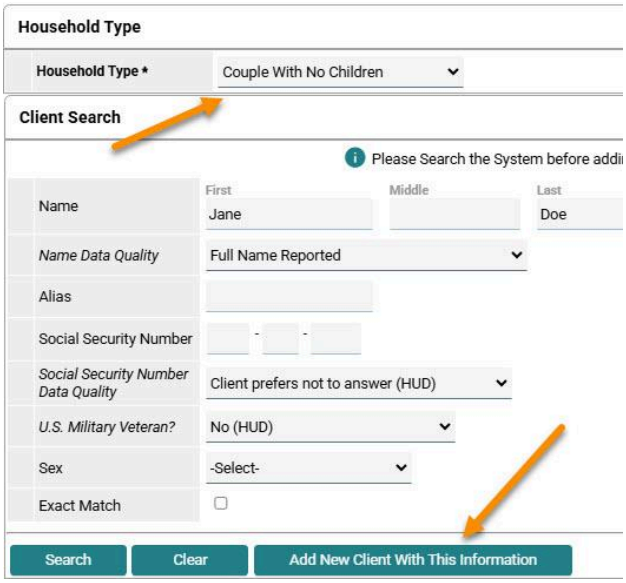


Continue with the data entry process in the following five important tabs to complete the entire RRH workflow.

- Households
- ROI
- Entry/Exit
- Assessments
- Service Transactions

2. Household tab

A **Household** only needs to be created in the event there are 2 or more individuals in the household being served.



- Click **Households** from the main menu bar.
- Click **Start New Household.**
- Enter the appropriate **Household Type**.
- Search the household member by entering the first three letters of their first name and last name like in step 1.
- Answer all the Data Quality questions.
- Click **Add New participant with The Information.**
- Once you have attached additional household members, Click Continue.
- Click **Head of Household** and select “Yes” to assign the Head of Household, the Relationship to Head of Household automatically changes to “Self” and the rest to “No.”
- For the second household member, click on Household to Relationship and choose the best answer to describe the relationship to the Head of Household.
- Enter the intake date in the Joined Household date.

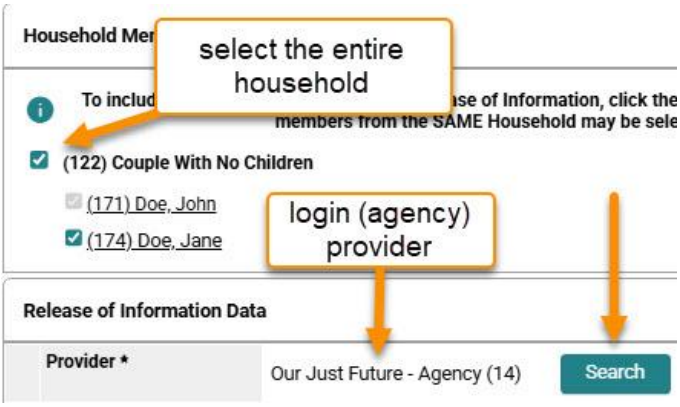


3. Release of Information tab (ROI)

All members of the household enrolled in the RRH program must complete an ROI. If all participants give the same consent to sharing, then follow the steps below. Otherwise, you must transact their ROIs separately.

In this demonstration, we will enroll this household into the RRH In Reach program (6930) from Our Just Future.

- Click **ROI** from the main menu bar.
- Click **Add Release of Information**
- Check the box next to the household type to select the entire household.
- Click **Search**.

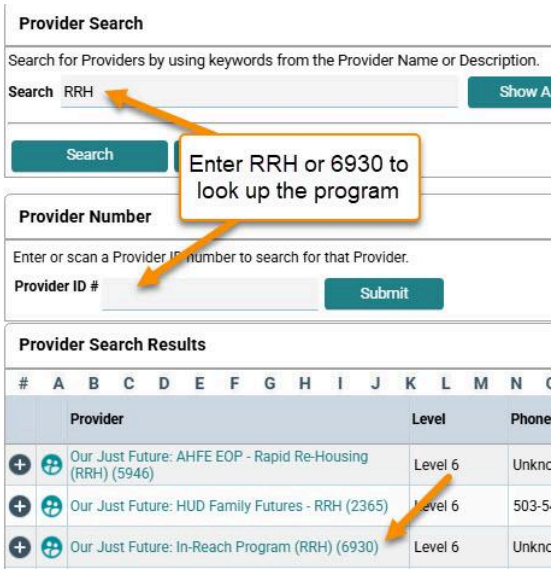


In order for other agencies to see the RRH assessment - you must select 2 providers:

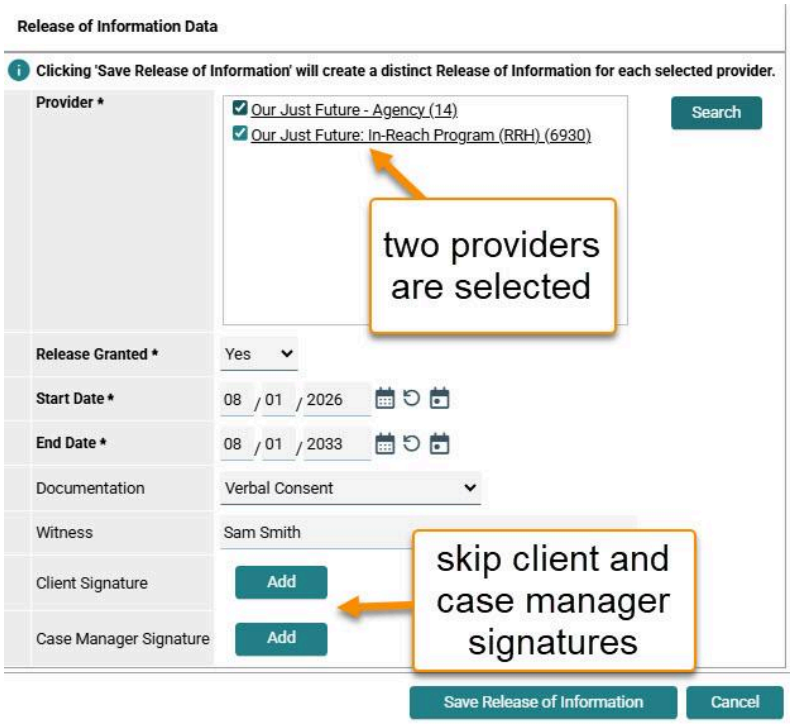
1) Login or agency, this is chosen by default, in this example, Our Just Future.
2) Project or program, where you enroll clients in, in this example, RRH In Reach program 6930. Each provider/program in HMIS is assigned a 4 digit number.

A Provider Search pop-up appears.

- Enter “RRH” in the **Search** box or the provider ID 6930 in the **Provider ID** box to look up the program.
- Click the **plus sign** to the left of the In Reach RRH to select it.
- Click **Exit** to close the Provider Search box.



- **Release Granted:** Select Yes or No based on whether clients agree to share data or not.
- **Start date:** the ROI start date *must* equal the program start date *even if consent was collected on a different day.*
- **End date: 7 years** after the start date.
- **Documentation:** Select Verbal Consent.
- **Witness:** Enter the name of the person identified in the Witness field of the Verbal ROI form.
- **Client Signature:** Skip this.
- **Case Signature:** Skip this.
- Click **Save Release of Information.**



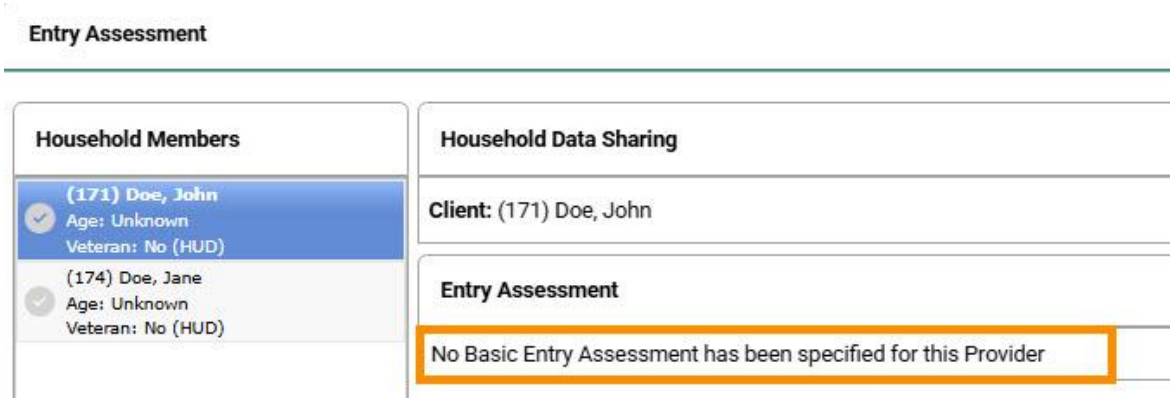
Wellsky added the new ROI buttons in early August, 2026. HSD does not require the use of these buttons. Data added to Client Signature and Case Manager Signature will not be migrated to Clarity HMIS.

4. Program Entry/Exit tab

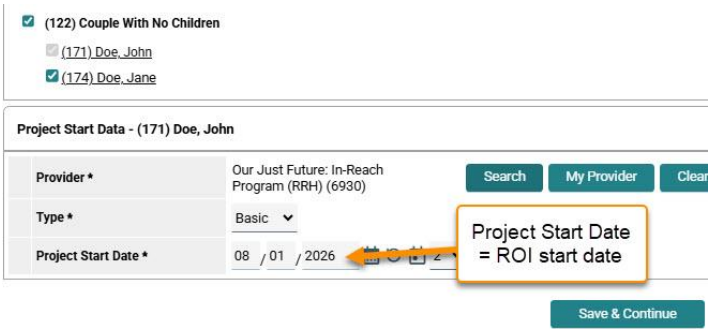
a. Entry

- Click **Entry/Exit** on the main menu bar.
- Click **Add Entry/Exit**.
- Check the box next to the household type to select the entire household.

The agency provider is set by default and it does not carry an assessment. If you proceed with this agency provider by mistake, you will see this error message:

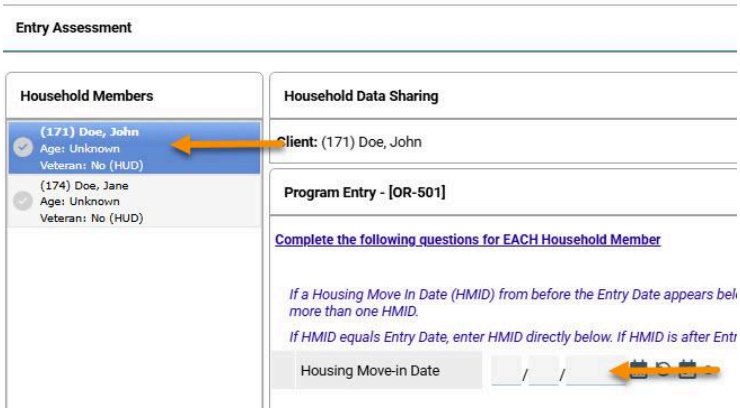


- Click **Search** to select the RRH program from the **Provider Search** box. Revisit this step if needed.
- **Provider**: RRH In Reach.
- **Type**: select **Basic**.
- **Project Start Date**: must equal the ROI start date. In this example, 08/01/2026.
- Click **Save & Continue**.
  An Entry/Exit Data (RRH main assessment) popup appears.



b. Housing Move In Date (HMID)

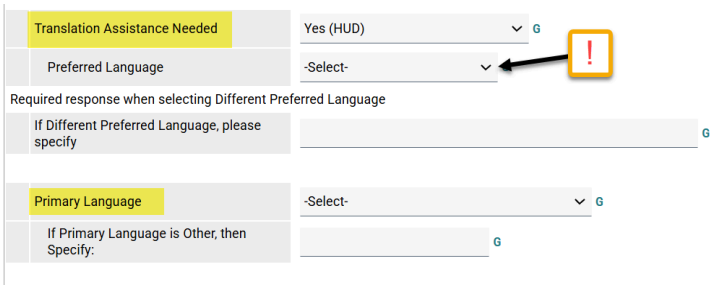
The Head of Household's name is highlighted on the left menu because we will do intake for the Head of Household first, and continue the same assessment with the rest of the household.



HMID is a critical data element in RRH that many users either miss or enter incorrectly. Remember, **HMID must be on or after the program entry date only, never prior.**

If clients are not housed on the entry date, leave HMID blank. If clients were housed before the entry date, or transferred from another RRH provider, HMID must equal the entry date and the ROI start date.

- **HMID:** John and Jane Doe were not housed so we leave HMID blank.
- **Relationship to Head of Household:** select **self** (Head of Household) for John Doe.
- **Enrollment CoC**: Select OR-501 Portland/Gresham/Multnomah County.
- **DOB** and **Date of Birth Type:** if John declines to answer, leave DOB blank and select **client doesn't know** or **client prefers not to answer.**
- **Gender** identity and **race/ethnicity** identity. To select multiple values, hold down the "ctrl" key on PC or "cmd" key on Mac and click on each value.
- Answer if Translation Assistance is Needed and if 'yes', identify which language is needed.
- Select Primary language.

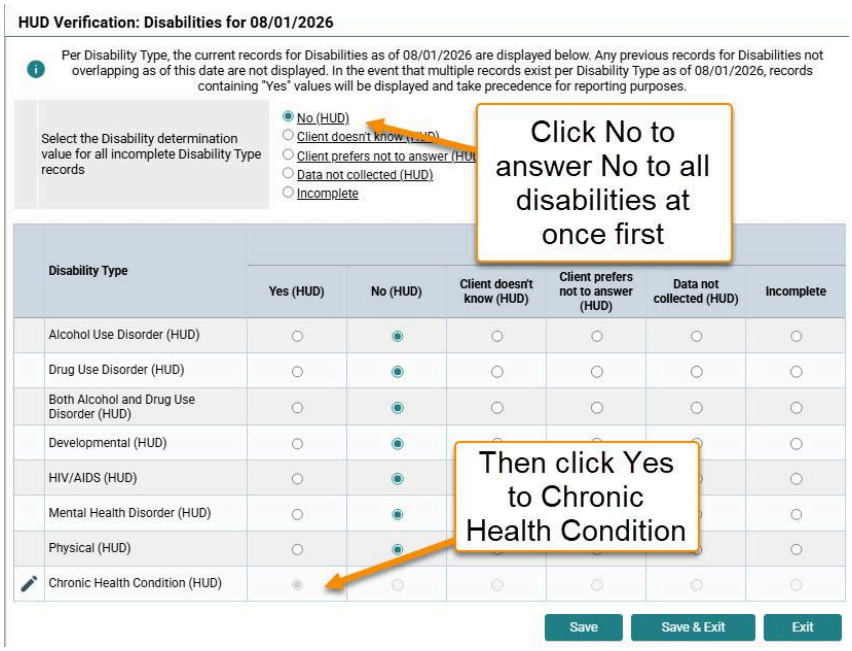


c. HUD verification sub assessments

Disabilities, along with **Health Insurance, Income and Non Cash Benefits**, is one of the four (4) HUD verification sub assessments you must verify and can change over time during program enrollment. They are marked with a red triangle warning sign to the right and a verification question on top.



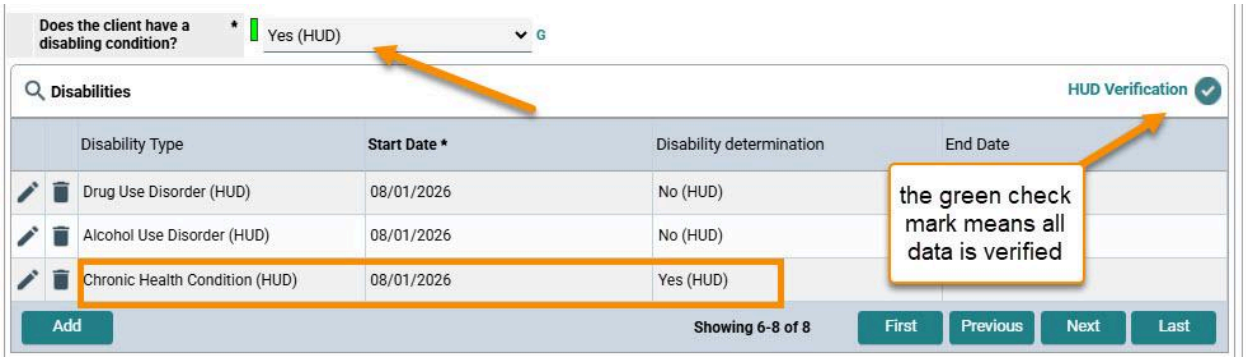
- Click the red triangle warning sign to open the disabilities sub assessment.
- Select **No** on top to answer No for all disabilities at once.
- Select **Yes** to one or more conditions accordingly, in this example, **Chronic Health Condition**. *These disabling conditions are self-reported and do not require notes from doctors*.



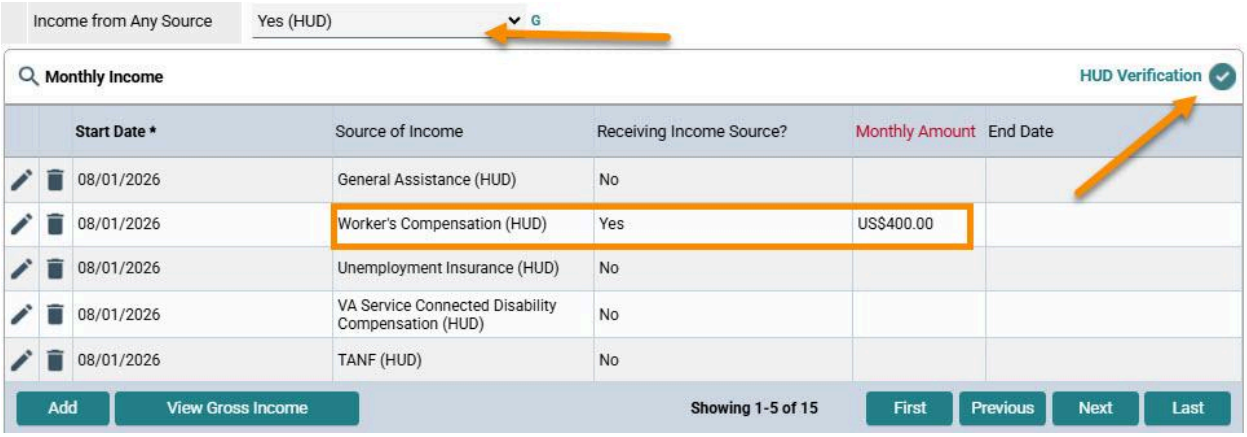
- Enter some notes for the condition (not required) in the **Add Recordset popup**.
- Click **Save**.
- Click **Save & Exit**.
- Answer **Does the client have a disabling condition:** select **Yes** as John had at least one condition, Chronic Health Condition. If John did not have any disabilities, select **No**.

Examples

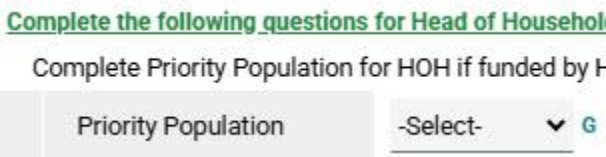
1. This is an example of an accurate verification. A red triangle warning sign is replaced by a green check mark and the question on top matches the sub assessment.



2. This is another example of John reporting $400 monthly income from Worker's Compensation at intake on August 1, 2026.



SHS Priority Population (population A/B)



SHS stands for "Supportive Housing Services". Use this question to indicate whether heads of household belong to SHS population A or B. This question is required for all programs receiving *any* HSD funding.

The Pop A/B form must be included as part of the intake and can be downloaded from our department website https://hsd.multco.us/hmis-links-for-providers/pop-a-b-forms/

- Complete this question for all Heads of Households only.

- **Definition:** Population A includes participants who self-report a disabling condition, are below 30% AMI, and are experiencing long-term homelessness or at imminent risk. *Use the Experiencing or At Imminent Risk of Homelessness* form to determine SHS population status.

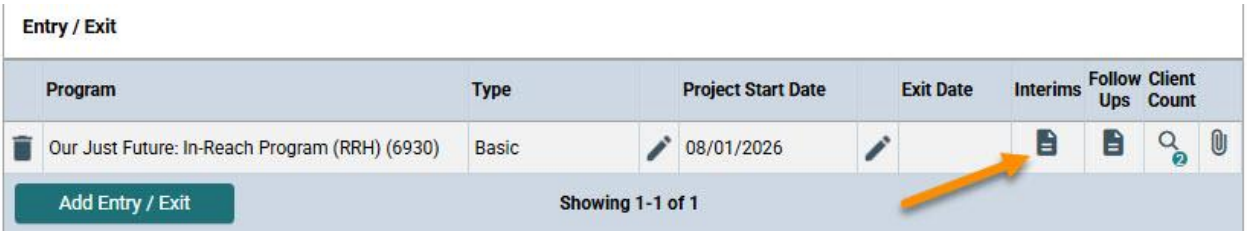
Population B includes anyone who is not in Population A.

Continue with Health Insurance, and Non Cash Benefits and the rest of the RRH assessment.

- Click Save to finish John's assessment.
- Move up the page, click the rest of the household members' tabs on the left menu to start the intake for them.
- Click Save & Exit once finished.

This is an example of accurate program enrollment.

- Click the Interims icon to enter updates or changes in clients' situations.

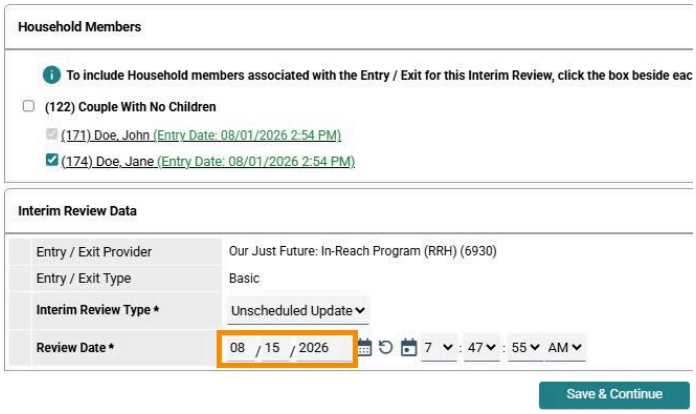


d. Interims

Any updates or changes that happen after intake (in this example, 08/01/2026) must be recorded in Interims.

Here is the first scenario: John was housed on 08/15/2026.

- Click **Interims** icon
- Click **Add Interims Review**
- **Interims Review Type:** unscheduled update or update
- Review Date: **08/15/2026**
- Click **Save & Continue**



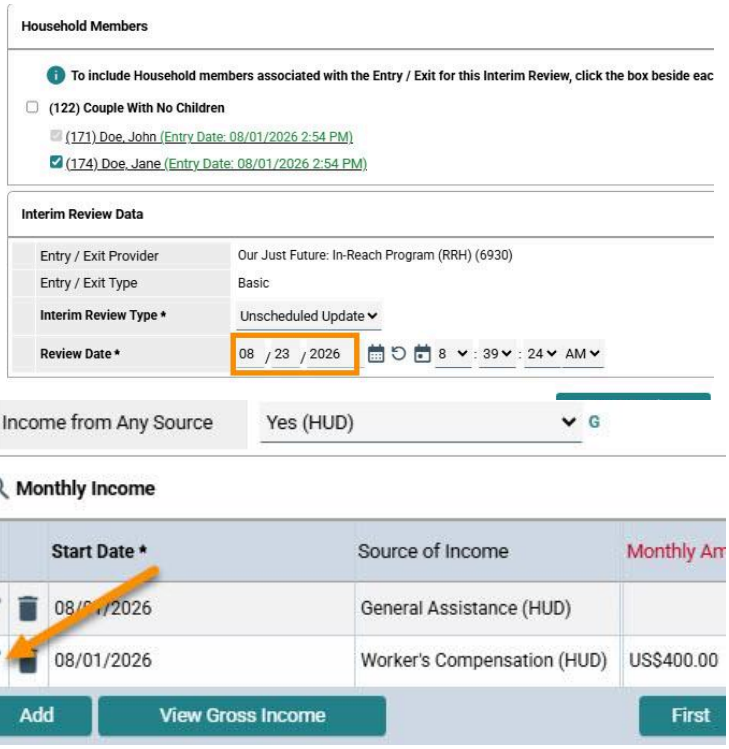
You will see the same assessment but HMID is still blank. Fill in HMID accordingly. HMID in Interims indicates that clients are housed at a later date after intake.



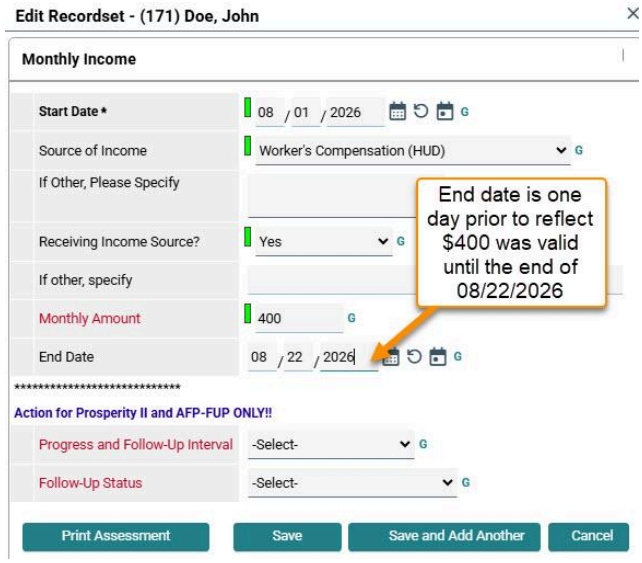
- Scroll down to the end of the page, click **Save & Exit**.

Here is the second scenario: and a few days later, on 08/23/2026, John reported the $400 monthly income from Worker's Compensation ended. The process involves two steps: first reflect the $400 was available from the project start date 08/01/2026 until the end of 08/22/2026, then starting on 08/23/2026, the $400 was no longer available.

- Click **Interims**.
- Click **Add Interims Review.**
- **Interims Review Type:** unscheduled update or update.
- Review Date: **08/23/2026.**
- Click **Save & Continue.**

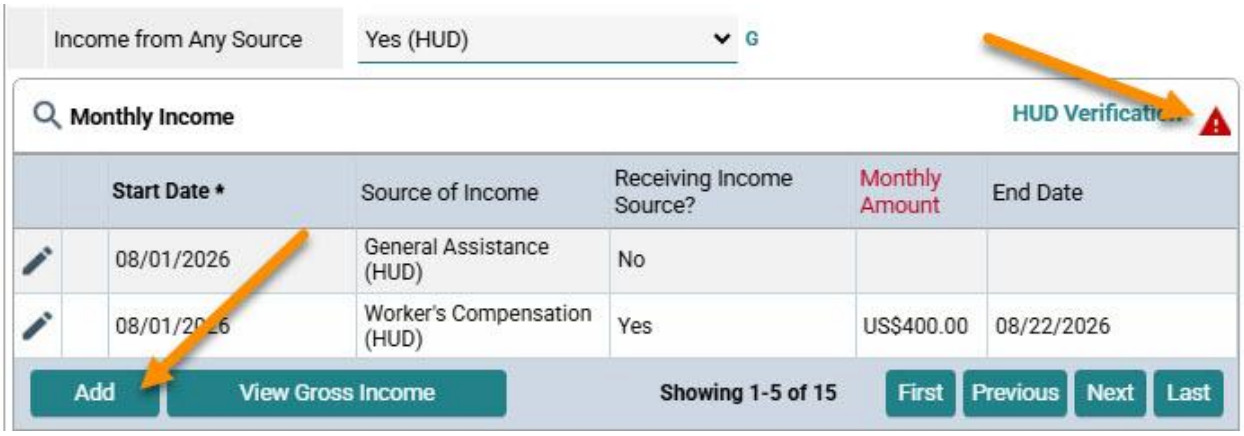


- Click the pencil to edit Worker's Compensation.

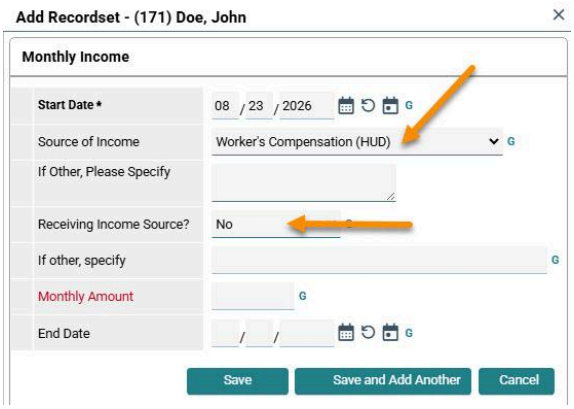


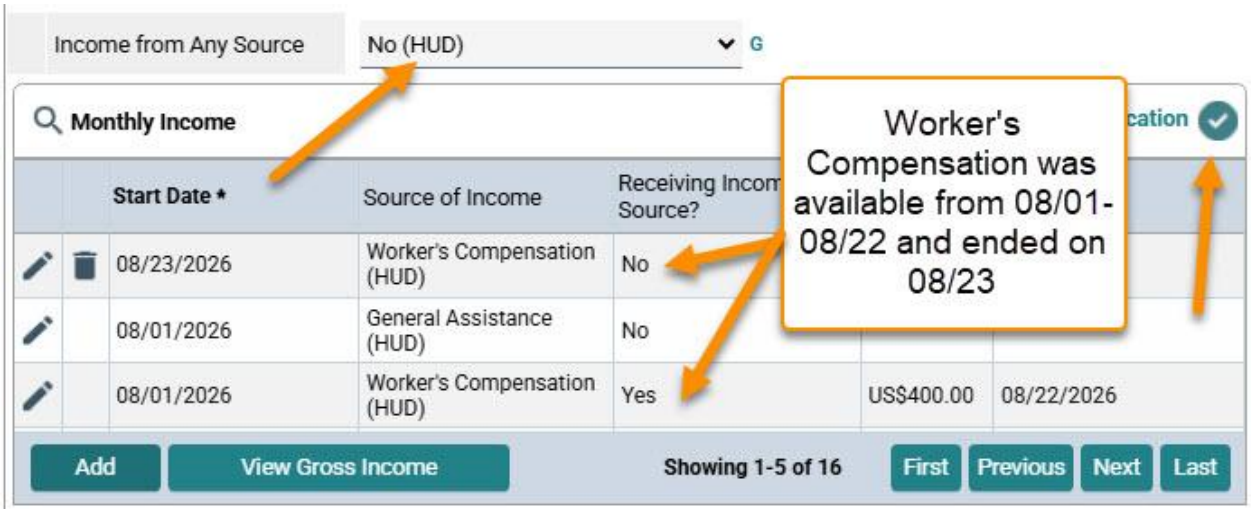
- In the Edit Recordset popup, put in the end date one day earlier, 08/22/2026.
- Click **Save**.

The popup goes away but now you will see the red triangle warning sign is back.



- Click Add
- Source of Income: Worker's Compensation
- Receiving Income Source?: No
- Click Save.
- Income from Any Source: select No because John now had no other incomes.





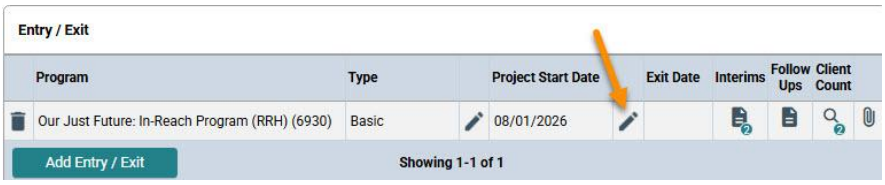
e. Exit

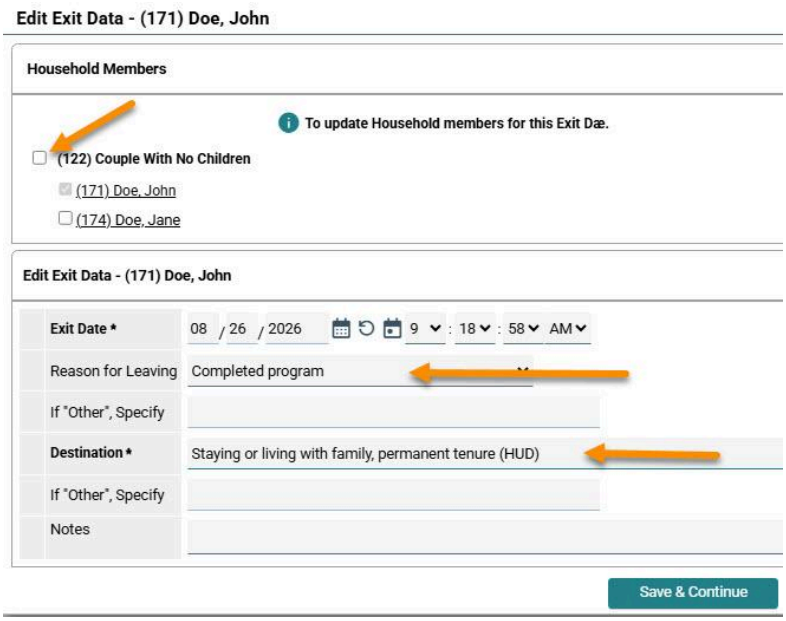
Participants should be exited from the RRH program when they are no longer being actively serviced by it.

★ If the participant was placed into permanent housing using RRH client assistance funds, the participant must receive an exit date of the final day they received that subsidy.

★ If the participant was not placed into permanent housing using RRH client assistance funds, or the participant continued to receive other supportive services beyond the final date of their subsidy, the participant must receive an exit date of the day they stopped working with the RRH program.

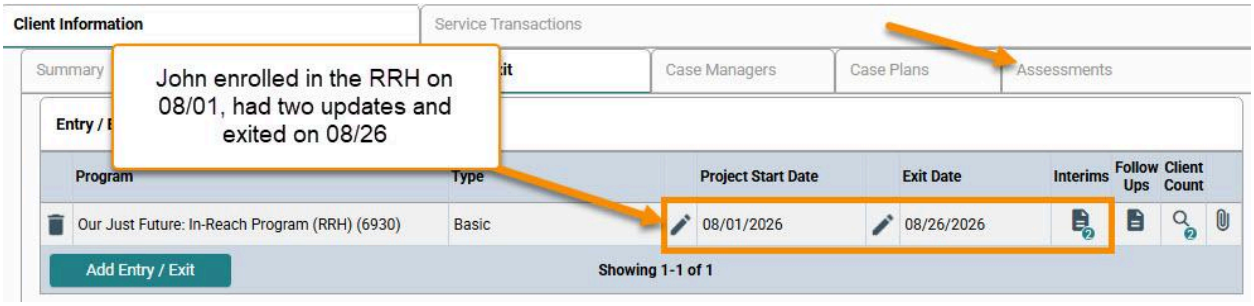
- Click the pencil next to the Exit date.
- Check the box next to the household type.
- Reason for Leaving: choose an appropriate selection from the drop down.
- Destination: choose an appropriate selection from the drop down.
- Click Save & Continue
- Make any needed updates in the exit assessment. Once all updates are complete, scroll to the bottom and click Save & Exit.



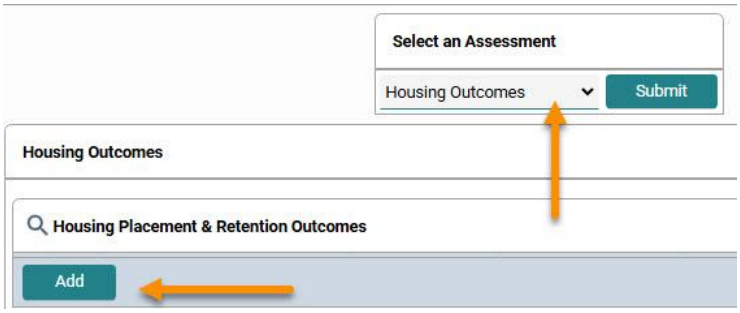


5. Assessments tab (6 month and 12 month follow-ups)

This screenshot demonstrates that John enrolled in the RRH program on 08/01/2026, reported two updates in Interims and exited the program on 08/26/2026.

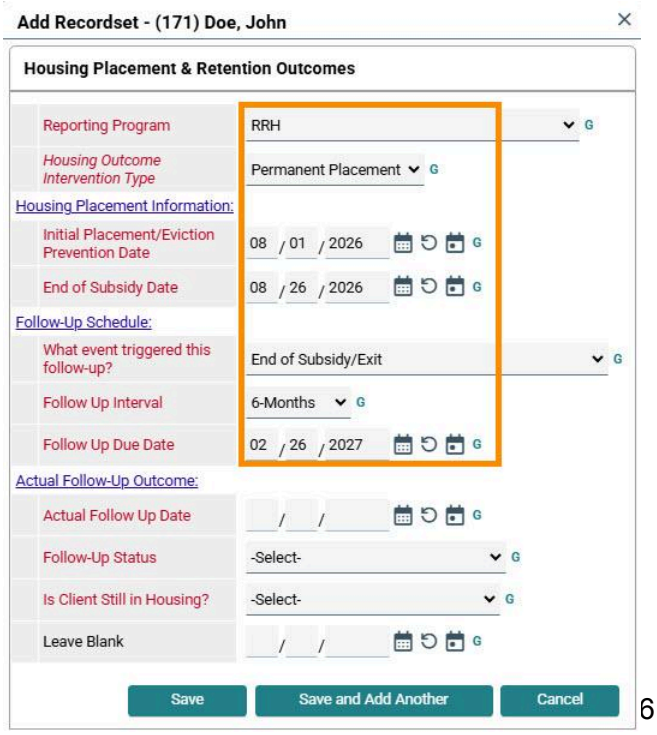


- Click Assessments tab
- Select an Assessment: select Housing Outcomes if it's not already chosen.
- Click Submit.
- Click Add under Housing Placement & Retention Outcomes.



Add Recordset popup appears.

- Reporting Program: RRH.
- Housing Outcome Intervention Type: Permanent Placement.
- Initial Placement/Eviction Prevention Date: RRH entry date = 08/01/2026.
- End of Subsidy Date: RRH exit date = 08/26/2026.
- What event triggered the follow-up? End of Subsidy/Exit.
- Follow-up Interval: 6-months

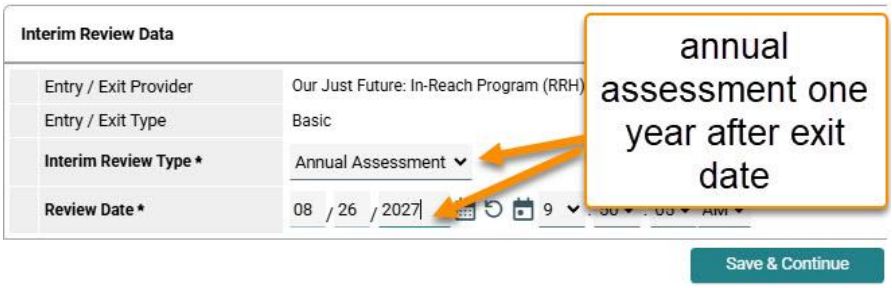


- Follow Up Due Date: 02/26/2027.
- Click Save.
- Repeat the same steps for a 12 month follow up.

Annual Assessment

Annual review occurs one year after clients exit the RRH program, on the 12 month follow up date, in this example, 08/26/2027.

- Click **Interims** icon
- Click **Add Interims Review**
- **Interims Review Type:** Annual Assessment
- Review Date: **08/26/2027**
- Click **Save & Continue**



Update any HUD sub assessments accordingly.

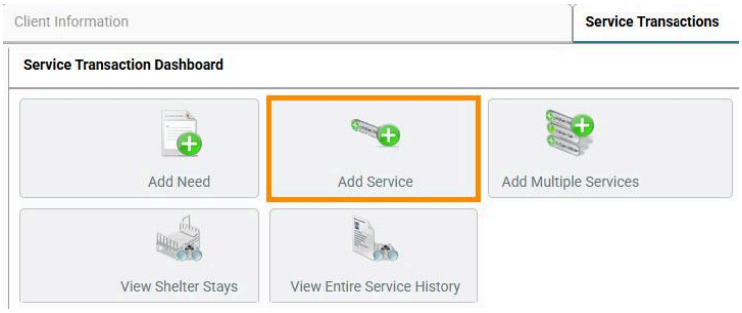
6. Service Transactions tab

Service Transactions are only required for some programs, including but not limited to Multnomah County Homeless Services Department's *Housing Placement out of Shelter* (aka *In-Reach*) and Oregon Housing and Community Services' *Homelessness Stabilization Division's RRH* programs. Appendix 1 has guidance for which Service Types to collect for some programs. Please reach out to hmishelp@multco.us or your funding agency's Contract Manager to get more specific information on which services need to be entered into HMIS.

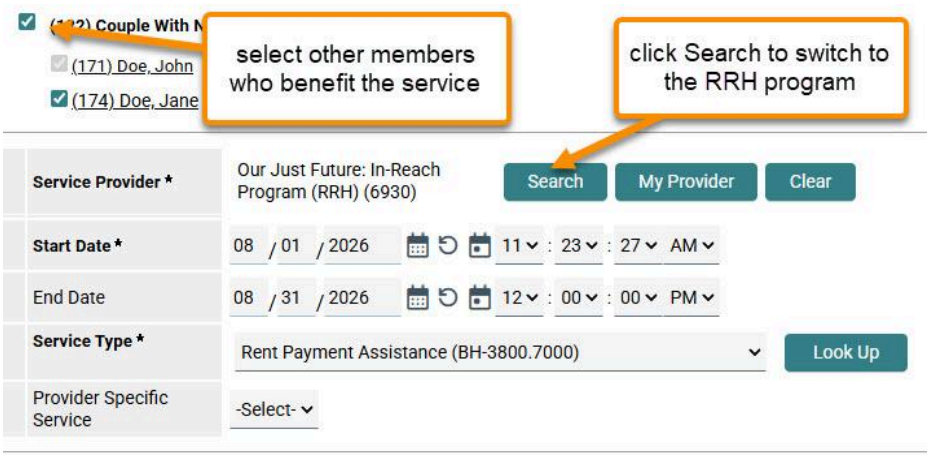
a. One service for one client

All transactions must be created from the profile of the person who is marked as Self (head of household) on the entry assessment. This will mark the head of household as the Primary Client on each transaction.

- Click **Service Transactions** on Client Profile page
- Click **Add Service**



- Include all household members who have been enrolled in your entry/exit project on the service transaction by checking the box next to their name.

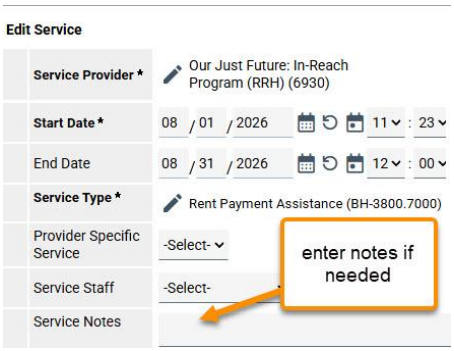


- The **Service Provider** must be the same as the Entry/Exit provider.
- Change the **Start Date** and **End Date** to reflect the beginning and end of the service.

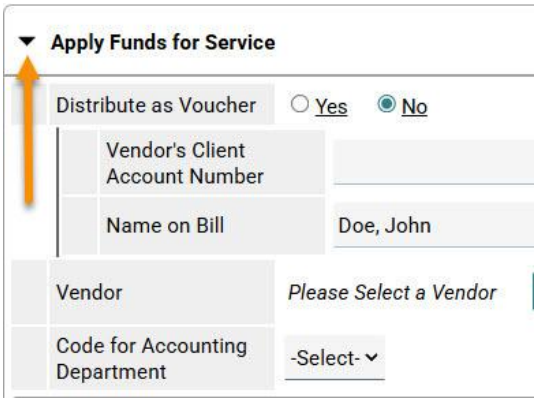
Examples: A Rent Payment for August will have a start date of 08/01 and an end date of 8/31. A bus pass given on 2/24 will have start and end dates of 2/24.

- Select a **Service Type**. Each Service Provider will have different Service Type options. If you believe the list of Service Types is inaccurate, please contact us.
- *Skip **Provider Specific** unless your organization has directed you otherwise.*
- Click **Save and Continue**.

- Under Edit Service, enter Service Notes if needed**.**



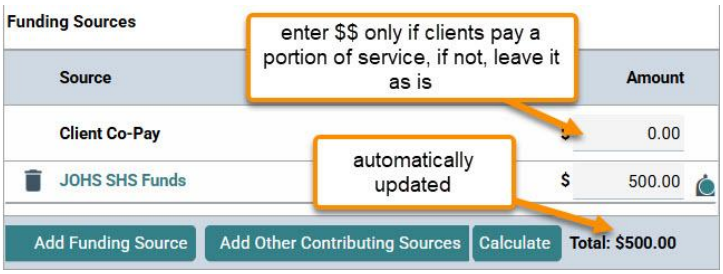
- If you need to track $$ with your service transactions, scroll down to the “Apply Funds for Service” section. Click the arrow to expand this section.



- Click **Add Funding Source**

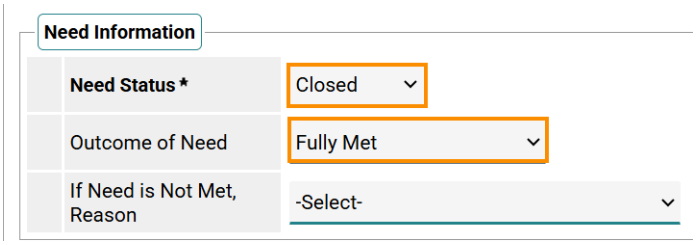


- Under Fund Search Results, click the grey plus sign to select a fund source.
- Complete the **Amount** in the row you just added.
- Enter any additional Client Co-Pay $ amount in the row above. The Total will automatically calculate.



In the Need Information section:

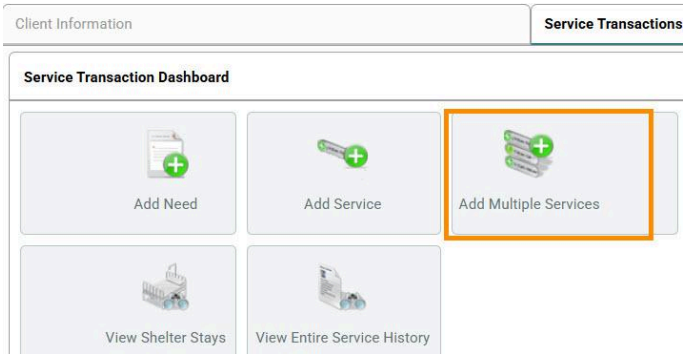
- **Need Status** to Closed
- **Outcome of Need** to Fully Met
- Click **Save & Exit** at the bottom of the page.



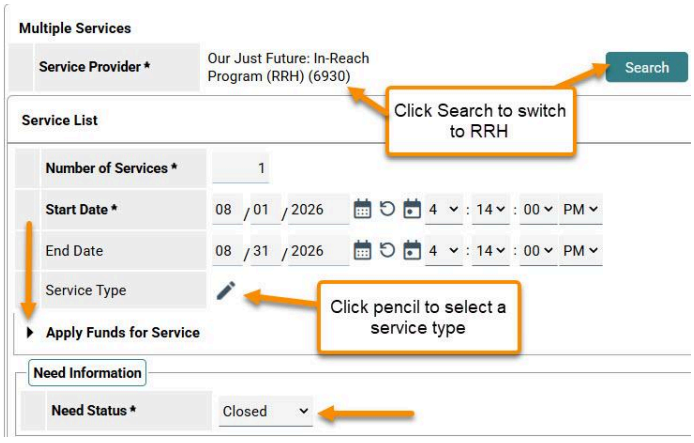
b. Multiple services for one client

Settings for this feature are configured specific to each program. Please contact us if you would like to use this feature and/or if your view looks different than what is presented here. All transactions must be created from the profile of the person who is marked as Self (head of household) on the entry assessment. This will mark the head of household as the Primary Client on each transaction.

- Click **Add Multiple Services**.
- Include all household members who have been enrolled in your entry/exit project on the service transaction.



- Click **Search** to select the matching Entry/Exit provider.
- Edit the **Start Date** and **End Date**.
- Click the pencil next to Service Type to pick **Service Type**.
- Add the **Funding Source** and dollar amount if needed (more detailed steps on this on pages 19).
- Change **Need Status** to Closed.



- Click **Add Another**. That will produce a new set of the same questions to create another service.
- Repeat until you've created all the service transactions for this participant.
- Click **Save and Exit**.

Appendix 1: Service Types for Specific Funding Sources

Service Transactions are only required for some rapid re-housing programs. This document gives guidance for which Service Types to collect for some programs. Please reach out to hmishelp@multco.us to get more specific information on which services need to be entered into HMIS if your program is not listed here, or you are not sure.

a. Housing Placement out of Shelter A.K.A. In-Reach

HMIS Service Type & Code	**Description of Service**
Rent Payment Assistance - BH-3800.7000	Ongoing rent payments, including pet and parking monthly fees.
Utility Service Payment Assistance - BV-8900.9300	Beginning and ongoing utility payments, including power, water and sewer, trash and internet.
Rental Deposit Assistance - BH-3800.7250	Beginning payments to landlord to begin tenancy, including security deposit, first/last months' rent, and pet deposits.
Rental Application Fee Payment Assistance - BH-3800.7200	Payments to submit rental applications.

b. Oregon Re-Housing Initiative, A.K.A. ORI

HMIS Service Type & Code	**Description of Service**
Basic Needs - B	Hygiene products, furniture, anything that is an eligible expense under your program that doesn't fit elsewhere.
Transportation Expense Assistance - BT-8300	Vehicle gas, bus tickets, HOP cards, car or bike repair.
Rent Payment Assistance - BH-3800.7000	Security deposit, rental payment, rental arrearage, rental application fee.
Utility Assistance - BV-8900	Utility arrearage, utility deposit, utility monthly payment.
Records/Licenses/Permits Fee Payment Assistance - DF-7020	Birth certificate, state identification card, drivers license, criminal background check.
Debt Reduction Funds - TB-0700.2200-160	Payments to draw down a debt that is preventing housing.

Appendix 2: Considerations for Program Transfers

Transfer to a new RRH program

Example: a participant currently receiving short-term RRH rental assistance is approved to receive a long-term housing voucher.

- The original entry is closed with an Exit Date of their last night spent at their RRH-supported unit.
- A new entry is created for the new program with an Entry Date of their first night spent at their long-term housing voucher supported unit.
    - HMID is entered at program entry (not an interim review) and matches the new Project Start Date.

Example: A RRH program at Agency A ends, and all clients being served by Agency A get transferred to Agency B.

- Original entry is closed with an Exit Date of the final day Agency A's program operation.
- A new entry is created for the new program with an Entry Date of the day Agency B's program operation begins.
    - HMID is entered at program entry (not an interim review) and matches the new Project Start Date.

Unit Transfer

Example: The participant's unit needs repair. Their landlord moves them to another unit.

- *No action is required* for unit transfers within the same program, so long as there is no break in the participant's housing status.

Example: A participant gets evicted from their RRH-supported housing. Their RRH caseworker works with participant to find them new housing, but the participant was unhoused for a period of time in between.

- Exit the RRH enrollment with an Exit Date of their move-out.
- Create a new enrollment **with no HMID.**
- Create an Interim Review with an HMID when the participant gets rehoused.