Why are TBRA service items important?

Although HUD does not require HMIS for TBRA funded projects, Commerce is using HMIS TBRA service item data for entry into the HUD Integrated Disbursement and Information System (IDIS). A Department of Commerce staff person receives a regular HMIS TBRA report and enters data from the report into IDIS. Entering standardized TBRA service data in HMIS provides a more efficient and useful report for IDIS data entry proposes.
# Table of Contents

Why are TBRA service items important? ................................................................. 1

**Before adding TBRA services** ........................................................................ 3

Changes in 2018 .................................................................................................... 3

**Instructions** ...................................................................................................... 3

TBRA Enrollment .................................................................................................. 3

Enroll into TBRA project: .................................................................................... 4

TBRA Enrollment Questions ................................................................................ 5

**TBRA Service Tracking** .................................................................................. 6

Adding New Services ............................................................................................ 6

Editing a Service ................................................................................................... 8

**Need Help?** ....................................................................................................... 11
Before adding TBRA services

The client must have a Client Profile and be enrolled in the TBRA project. If you do NOT understand this or need a tutorial, contact your HMIS Trainer first.

Rent Assistance is only recorded in the Head of Household project record.

A partial example of HMIS TBRA report used for IDIS data entry:

<table>
<thead>
<tr>
<th>Client Unique Id</th>
<th>Enrollment Bedroom Number</th>
<th>Service Item</th>
<th>Expense Amount</th>
<th>HH Total Client</th>
<th>Enrollment HH Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>2 bedrooms</td>
<td>Rent Assistance (TBRA)</td>
<td>$491.00</td>
<td>2</td>
<td>Single parent (A single parent)</td>
</tr>
<tr>
<td>60</td>
<td>1 bedroom</td>
<td>Rent Assistance (TBRA)</td>
<td>$250.00</td>
<td>2</td>
<td>Elderly (one or two person house)</td>
</tr>
<tr>
<td>60</td>
<td>1 bedroom</td>
<td>Utility Payment</td>
<td>$23.00</td>
<td>2</td>
<td>Elderly (one or two person house)</td>
</tr>
<tr>
<td>43</td>
<td>0 bedrooms/efficiency</td>
<td>Rent Assistance (TBRA)</td>
<td>$555.00</td>
<td>2</td>
<td>Single, non elderly (one-person)</td>
</tr>
<tr>
<td>43</td>
<td>0 bedrooms/efficiency</td>
<td>Tenant Rent (tenant paid)</td>
<td>$75.00</td>
<td>1</td>
<td>Single, non elderly (one-person)</td>
</tr>
<tr>
<td>92</td>
<td>3 bedrooms</td>
<td>Security Deposit</td>
<td>$125.00</td>
<td>4</td>
<td>Two parents (a two-parent household)</td>
</tr>
<tr>
<td>70</td>
<td>1 bedrooms</td>
<td>Rent Assistance (TBRA)</td>
<td>$605.00</td>
<td>2</td>
<td>Single parent (A single parent)</td>
</tr>
<tr>
<td>95</td>
<td>1 bedrooms</td>
<td>Utility Deposit</td>
<td>$100.00</td>
<td>1</td>
<td>Other. Any household not included</td>
</tr>
</tbody>
</table>

Changes in 2018

All of these changes are explained in these instructions:
- If a service is ongoing (more than one consecutive month), you will NOT have to add another service item entry. Instead, you will use the placeholder Service End Date per the instructions below. This will allow the service entry to carry over for TBRA reports.
- Tenant paid amounts are tracked as a separate service item vs. as a note.
- Utility Deposits are tracked as a separate service item.
- The enrollment screen now has a drop-down for Household Type and Number of Bedrooms (eliminating the need for codes in service item notes).

*Please follow the following instructions to ensure your HMIS TBRA service data is entered correctly.*

Instructions

TBRA Enrollment

**Before enrollment:**
- Ensure each client profile is complete and accurate.
- For group households, ensure all other household members were added to the household, and the head of household is correct. Contact your HMIS Trainer for household management instructions.
Example of a group household of two in household management. The star indicates the head of household.

Enroll into TBRA project:

**From the head of household profile:**

1. Click on the Programs tab.
2. Click on the appropriate TBRA program name or drop-down arrow for it.

3. For group households, toggle on the other household members enrolling together into the program. For all household types, click Enroll to start enrollment.
4. Answer the enrollment questions for the head of household (and if a group, other household members) and Save.

Example of TBRA RRH blank head of household enrollment screen.

**TBRA Enrollment Questions**

Besides standard HMIS project questions, there are a few TBRA specific questions:

- **All Rapid Re-housing (RRH) programs** - please check the [HUD Data Standards Manual](#) Program Start Date and Housing Move-In Date definitions. Contact your HMIS Trainer for HMIS RRH data entry instructions.

- **Household Type TBRA** (collected under the head of household), pick the appropriate choice:

  - Single, non-elderly (One-person household in which the person is not elderly.)
  - Elderly (One or two person household with person at least 62 years of age.)
  - Single parent (A single parent household with a dependent child or children (18 years old or younger.)
  - Two parents (a two-parent household with a dependent child or children (18 years old or younger.)
  - Other. Any household not included above, including two or more unrelated individuals.

**Household Size** (collected under the head of household) = enter the number of people in the household at the time of enrollment.
Number of Bedrooms - (collected under the head of household) pick the appropriate choice (0 bedroom/Efficiency can mean a studio apartment):

<table>
<thead>
<tr>
<th>Service category/type</th>
<th>Rent Assistance</th>
<th>Security Deposit</th>
<th>Utility Deposit</th>
<th>Utility Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service items</td>
<td>TBRA Rent Assistance</td>
<td>Security Deposit</td>
<td>Utility Deposit</td>
<td>Utility Payment</td>
</tr>
<tr>
<td></td>
<td>Tenant Rent (Tenant Paid Amount)</td>
<td>Security Deposit</td>
<td>Utility Deposit</td>
<td>Utility Payment</td>
</tr>
</tbody>
</table>

TBRA Service Tracking

Create/Add ONE service item for each service type as appropriate:

Adding New Services

The client must first be in HMIS and enrolled in the appropriate TBRA program before proceeding.

1. From within the client’s TBRA program record, click on Provide Services.
2. Select the down arrows for the appropriate service type and service item.
3. Enter the following Start and End Dates:

<table>
<thead>
<tr>
<th>TBRA Rent Assistance</th>
<th>Tenant Rent</th>
<th>Security Deposits</th>
<th>Utility Deposits</th>
<th>Utility Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>First Date Service Provided (first of month of service)</td>
<td>Date Service Provided (first of month for rent payment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>01/01/2030 (upon project exit, date will automatically be changed to the project exit date)</td>
<td>Last date of the payment month. If a Utility Payment is ongoing, use the same end date instructions for Rent Assistance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expense Date</td>
<td>Match start date</td>
<td>Match start date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Dates are entered directly into the field or by using the calendar icon to pick a date. The format must be a two-digit month, two-digit day, and four-digit year (ex. 01/01/2030).
For example, a security deposit payment for May 2018 would have a Start Date of 05/01/2018 and End Date 05/31/2018. Rent assistance would have a Start Date 05/01/2018 and End Date 01/01/2030, but when you exit them from the project, the End Date will automatically change to be the project exit date.

4. The Expense Date should match the Start Date.

5. Enter the Expense Amount (no dollar sign) associated with the service.
6. Do NOT change the Funding Source; leave it as “No Funding Source.”

7. Submit to SAVE the service.

Editing a Service

1. Go to the project record, then click on the History sub tab and hover over the Service you need to edit.

2. The Edit (pencil) icon will appear when you hover over the Service. Click on the Edit icon.
3. Edit the Start Date or End date as needed. Save Changes.
4. To edit the Expense amount information - hover over “No Funding” and click the Edit icon.

5. From the Modify Expense pop up box, you can edit the Amount, edit the Expense Date, add a Check Number, or add a Vendor name.

6. SAVE when done and then SAVE at the bottom of the main page too.
Need Help?
Please contact your HMIS Trainer for assistance, Maylee Stevenson, maylee.stevenson@commerce.wa.gov. You can also find HMIS materials at www.commerce.wa.gov/hmis.