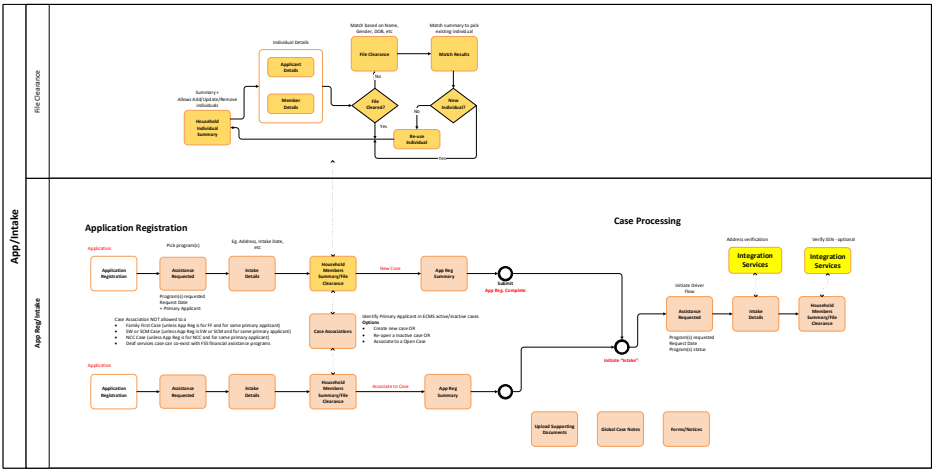
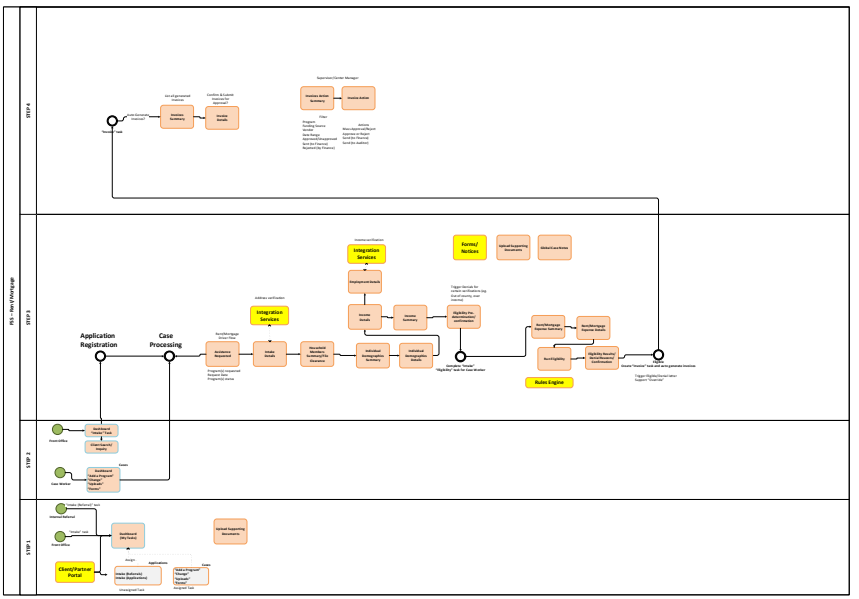
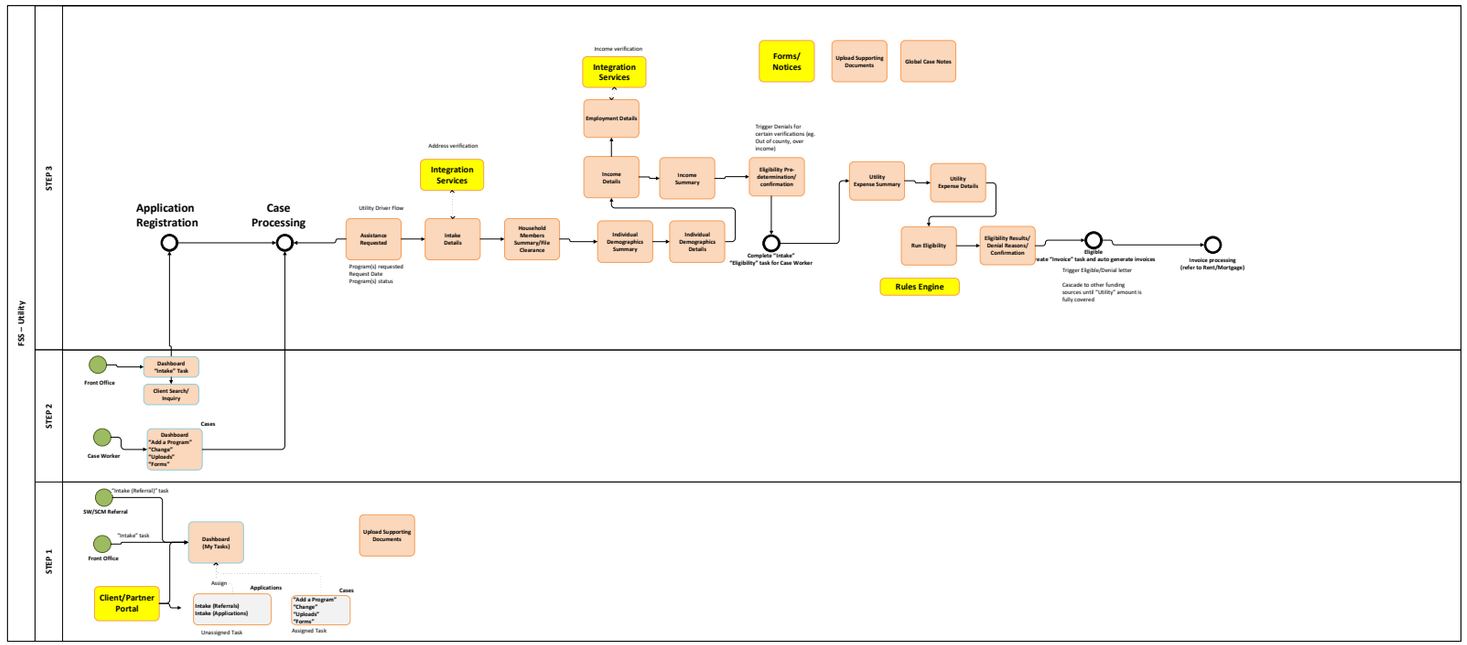
# Table of Contents
# ECMS Functional Flow

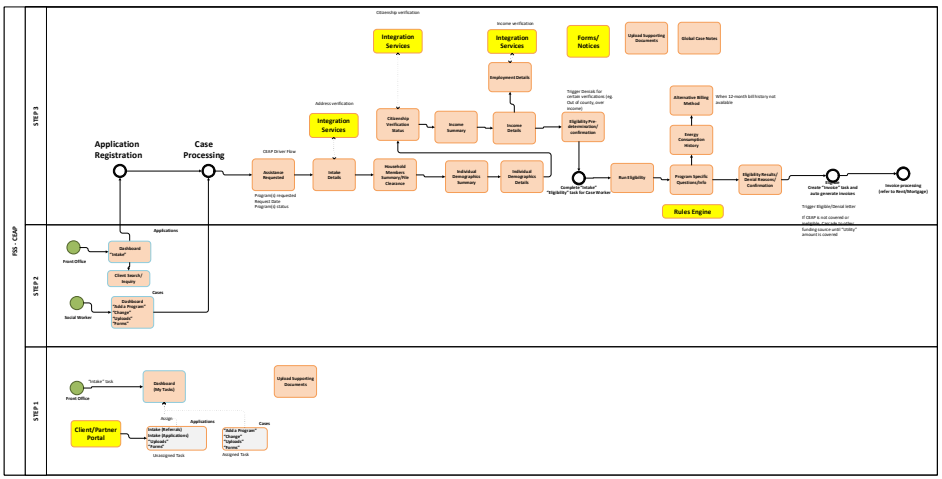
# ECMS Functional Flow

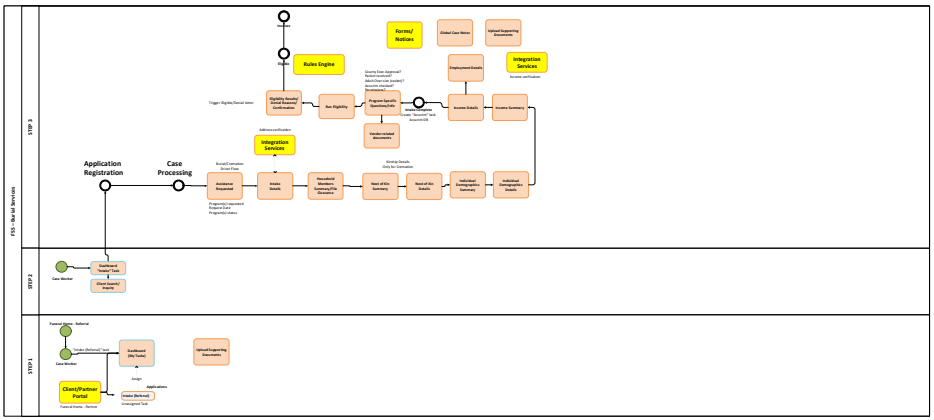
| Tab | Program |
|---|---|
| 0 | HHS Standard Tasks |
| 1 | App Reg/Intake |
| 2 | Rent/Mortgage |
| 3 | Utility |
| 4 | CEAP |
| 5 | Burial |
| 6 | SW/SCM |
| 7 | In-Kind Services |
| 8 | Family First |
| 9 | NCC |
| 10 | Deaf Services |
| 11 | Housing & Weatherization |
| 12 | Housing Repair |
| 13 | Housing Referral |
| 14 | Weatherization |

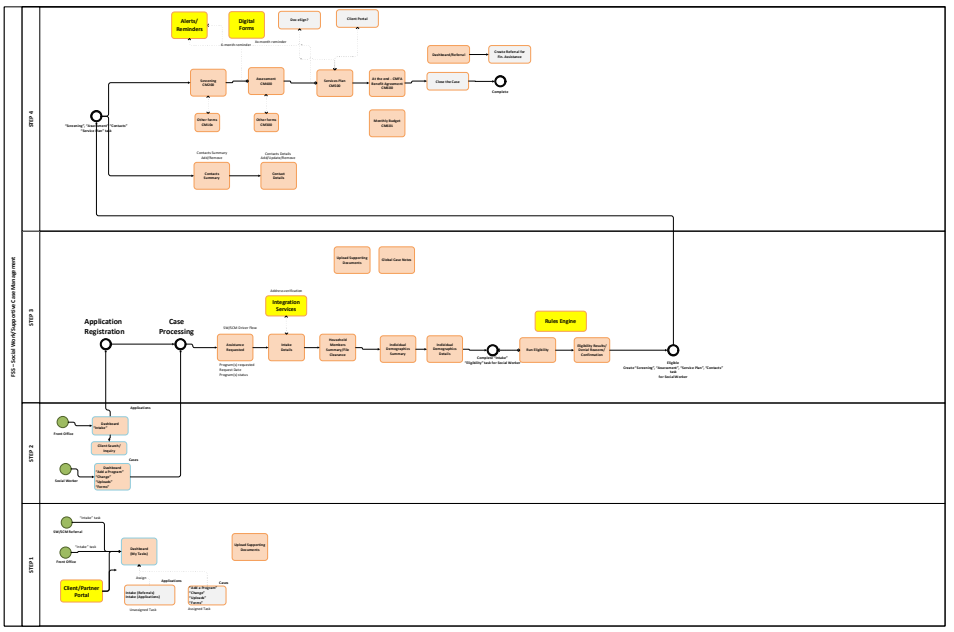

App/Intake
File Clearance
App Reg/Intake
Match based on Name, Gender, DOB, etc
Match summary to pick existing individual
Individual Details
File Clearance
Match Results
Applicant Details
Member Details
Summary+
Allows Add/Upd.ete/Remove individuals
File Cleared?
New Individual(s)?
Household Individual Summary
No
Yes
Re-use Individual
Application Registration
Case Processing
Application
Application Registration
Pick program(s)
Assistance Requested
Eg. Address, Intake Date, etc
Intake Details
Household Members Summary/File Clearance
New Case
App Reg Summary
Submit
App Reg: Complete
Program(s) requested
Request Date
Primary Applicant
Case Association NOT allowed to a
Family First Case (unless App Reg is for FF and for same primary applicant)
SW or SCM Case (unless App Reg is SW or SCM and for same primary applicant)
NCC Case (unless App Reg is for NCC and for same primary applicant)
Deaf services case can co-exist with FSS financial assistance programs
Case Associations
Identify Primary Applicant in ECMS active/inactive cases
Options:
Create new case OR
Re-open a inactive case OR
Associate to a Open Case
Application
Application Registration
Assistance Requested
Intake Details
Household Members Summary/File Clearance
Associate to Case
App Reg Summary
Initiate "Intake"
Initiate Driver Flow
Assistance Requested
Program(s) requested
Request Date
Program(s) status
Address verification
Integration Services
Intake Details
Verify SSN - optional
Integration Services
Household Members Summary/File Clearance
Upload Supporting Documents
Global Case Notes
Forms/Notices

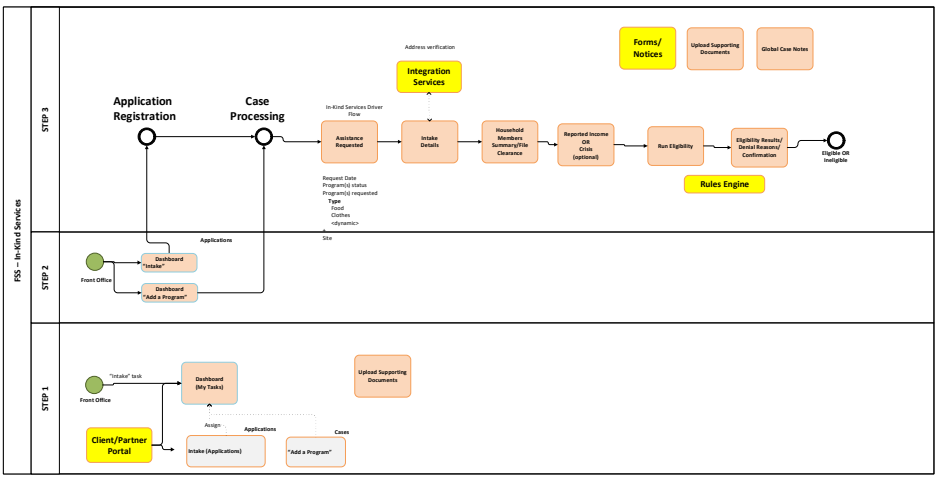

PES – Flex'eVoluptuair
STEP 4
STEP 3
STEP 2
STEP 1
Application Registration
Case Processing
Integration Services
Forms/ Notices
Rules Engine
Client/Partner Portal

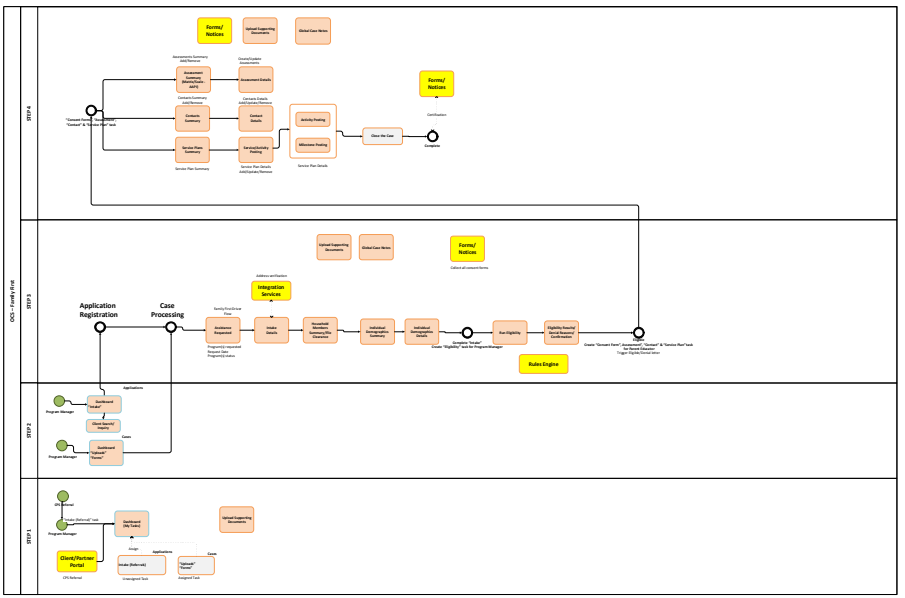

FSS – Utility
STEP 3
STEP 2
STEP 1
Application Registration
Case Processing
Utility Driver Flow
Assistance Requested
Program(s) requested
Request Date
Program(s) status
Address verification
Integration Services
Intake Details
Household Members Summary/File Clearance
Income verification
Integration Services
Employment Details
Income Details
Income Summary
Individual Demographics Summary
Individual Demographics Details
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Trigger Denials for certain verifications (eg. Out of county, over income)
Eligibility Pre-determination/ confirmation
Complete "Intake" "Eligibility" task for Case Worker
Utility Expense Summary
Utility Expense Details
Run Eligibility
Eligibility Results/ Denial Reasons/ Confirmation
Rules Engine
Eligible
reate "Invoice" task and auto generate invoices
Trigger Eligible/Denial letter
Cascade to other funding sources until "Utility" amount is fully covered
Invoice processing (refer to Rent/Mortgage)
Front Office
Dashboard "Intake" Task
Client Search/ Inquiry
Case Worker
Dashboard "Add a Program" "Change" "Uploads" "Forms"
Cases
"Intake (Referral)" task
SW/SCM Referal
"Intake" task
Front Office
Dashboard (My Tasks)
Upload Supporting Documents
Client/Partner Portal
Assign
Applications
Intake (Referrals) Intake (Applications)
Unassigned Task
Cases
"Add a Program" "Change" "Uploads" "Forms"
Assigned Task

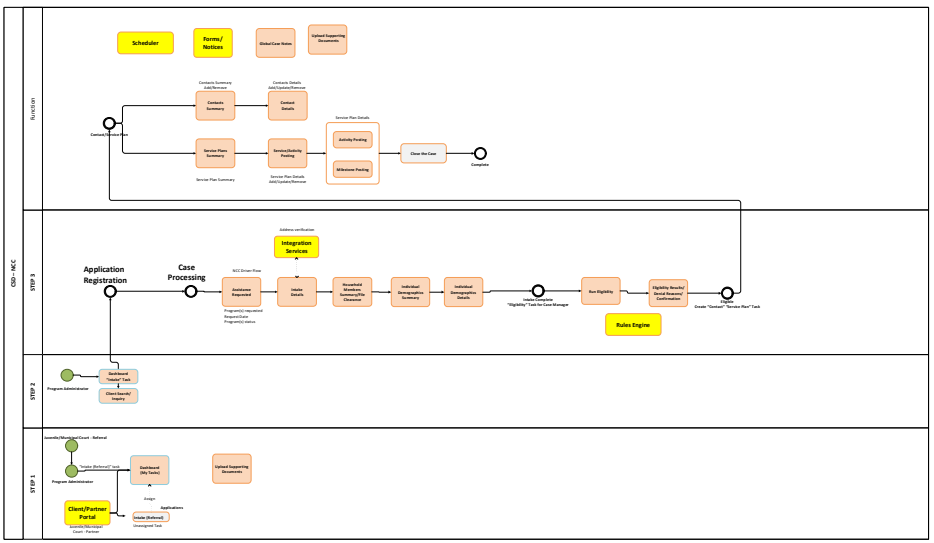

FSS - CEAP
STEP 3
STEP 2
STEP 1
Application Registration
Case Processing
CEAP Driven Flow
Assistance Requested
Program(s) requested
Request Date
Program(s) status
Address verification
Integration Services
Intake Details
Citizenship verification
Integration Services
Citizenship Verification Status
Household Members Summary/Sin Clearance
Income verification
Integration Services
Income Summary
Income Details
Employment Details
Individual Demographics Summary
Individual Demographics Details
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Trigger Denials for certain verifications (eg. Out of country, over income)
Eligibility Pre determination/ confirmation
Complete "Intake" "Eligibility" task for Case Worker
Run Eligibility
Alternative Billing Method
When 12-month bill history not available
Energy Consumption History
Program Specific Questions/Info
Rules Engine
Eligibility Results/ Denial Reasons/ Confirmation
Create "Invoice" task and auto generate invoices
Invoice processing (refer to Rent/Mortgage)
Trigger Eligible/Denial letter
If CEAP is not covered or available, calculate monthly funding source with "Utility" amount is covered
Applications
Front Office
Dashboard "Intake"
Client Search / Inquiry
Cases
Social Worker
Dashboard "Add a Program" "Change" "Upload" "Forms"
"Intake" Task
Front Office
Dashboard (My Tasks)
Upload Supporting Documents
Client/Partner Portal
Assign
Applications
Intake (Referrals) Intake (Applications) "Upload" "Forms"
Cases
"Add a Program" "Change" "Upload" "Forms"
Unassigned Task
Assigned Task


FSS - Retail Services
STEP 3
STEP 2
STEP 1
Application Registration
Case Processing
Rules Engine
Forms/ Notices
Global Case Notes
Upload Supporting Documents
Integration Services
Income Verification
Employment Details
Eligibility Results/ Global Reasons/ Confirmation
Run Eligibility
Program Specific Questions/KPIs
Income Details
Income Summary
Vendor-related documents
Integration Services
Address verification
Enrollment & Intake* Task
Client Search/ Inquiry
Case Worker
Enrollment (My Tasks)
Upload Supporting Documents
Client/Partner Portal
Intake (Referral)
Investigation Task
Applications
Assign


FSS – Social Work/Supportive Case Management
STEP 1
STEP 2
STEP 3
STEP 4
Client/Partner Portal
Intake (Referrals) Intake (Applications)
Unassigned Tasks
Dashboard (My Tasks)
Upload Supporting Documents
Field Office
Social Worker
Dashboard "Intake" "Change" "Update" "Escrow"
Client Inquiry
Dashboard "Intake" "Change" "Update" "Escrow"
Application Registration
Case Processing
Assistance Requested
Intake Details
Household Members Summary/Site Clearance
Individual Demographics Summary
Individual Demographics Details
Complete Manual "Eligibility" task for Social Worker
Run Eligibility
Eligibility Results/ Denial Reasons/ Confirmation
Integration Services
Rules Engine
Upload Supporting Documents
Global Case Notes
Alerts/ Reminders
Digital Forms
Client Portal
Screening CMDM
Assessment CMDM
Service Plan CMDM
Close the Case
Complete
Other forms CMDM
Other forms CMDM
Monthly Budget CMDM
Contacts Summary
Contact Details
Dashboard/Referral
Create Referral for Fin. Assistance


FSS – In-Kind Services
STEP 3
STEP 2
STEP 1
Application Registration
Case Processing
In-Kind Services Driver Flow
Assistance Requested
Intake Details
Address verification
Integration Services
Household Members Summary/File Clearance
Reported Income OR Crisis (optional)
Run Eligibility
Eligibility Results/ Denial Reasons/ Confirmation
Eligible OR Ineligible
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Rules Engine
Request Date
Program(s) status
Program(s) requested
Type
Food
Clothes
<dynamic>
Site
Applications
Front Office
Dashboard "Intake"
Dashboard "Add a Program"
"Intake" task
Dashboard (My Tasks)
Upload Supporting Documents
Client/Partner Portal
Assign
Applications
Cases
Intake (Applications)
"Add a Program"


OCS – FrameWorks
STEP 1
STEP 2
STEP 3
STEP 4
Application Registration
Case Processing
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Integration Services
Rules Engine
Client/Partner Portal
Dashboard (My Tasks)
Intake (Referrals)
Client Search/ Inquiry
Close the Case
Certification
Enrollment


CSD – MCC
Scheduler
Forms / Notices
Global Case Notes
Upload Supporting Documents
Contacts Summary
Add/Remove
Contacts Details
Add/Update/Remove
Contacts Summary
Contact Details
Service Plan Details
Service Plans Summary
Service/Eligibility Pending
Ability Pending
Milestone Pending
Close the Case
Complete
Service Plan Summary
Service Plan Details
Add/Update/Remove
Address verification
Integration Services
Application Registration
Case Processing
NCC Driven Flow
Assessment Requested
Intake Details
Household Members Summary/File Clearance
Individual Demographics Summary
Individual Demographics Details
Intake Complete
"Eligibility" Task for Case Manager
Run Eligibility
Eligibility Results/ Denial Reasons/ Confirmation
Rules Engine
Program(s) requested
Request Date
Program(s) status
Program Administrator
Dashboard "Intake" Task
Client Search/ Inquiry
Scientific/Neurological Count - Referral
Intake (Referral)" task
Program Administrator
Dashboard (My Tasks)
Upload Supporting Documents
Assign
Applications
Client/Partner Portal
Scientific/Neurological Count - Partner
Intake (Referral)
Investigation Task
STEP 4
STEP 3
STEP 2
STEP 1

Services

STEP 3

STEP 4

**Application Registration**

**Case Processing**

**Scheduler**

**F N**

Service Ac

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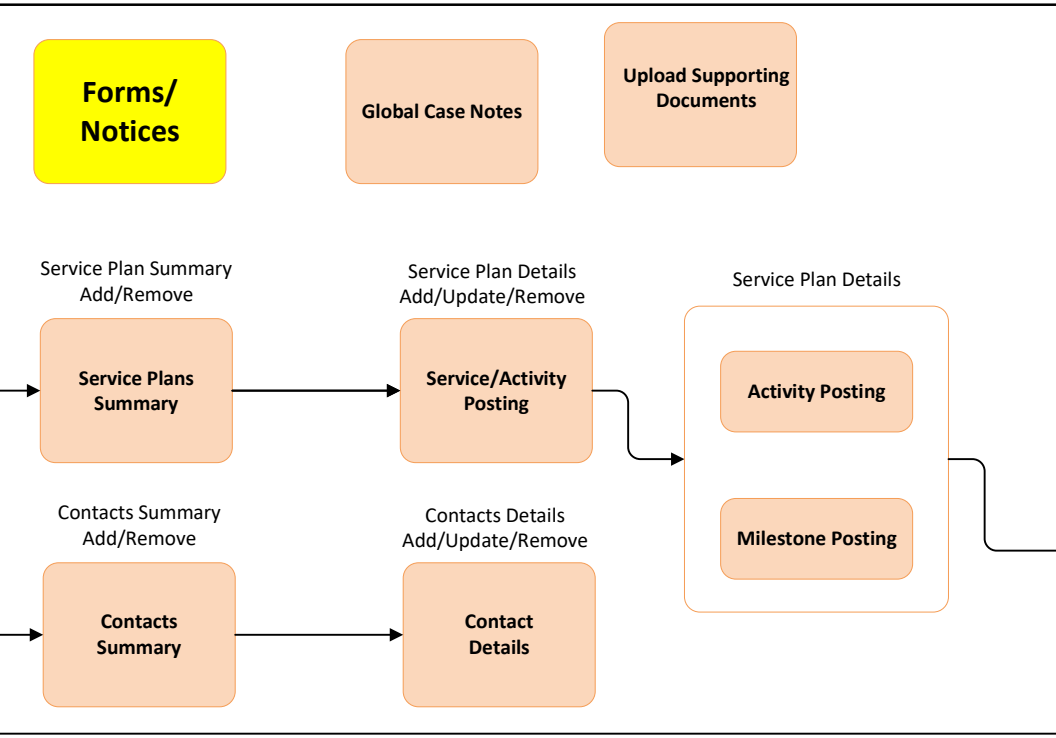
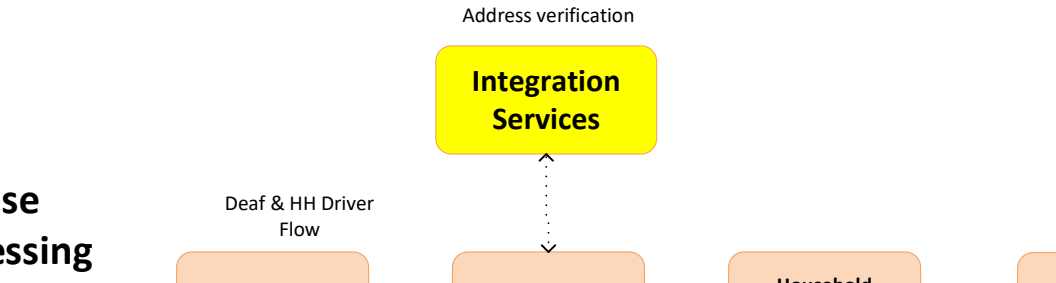
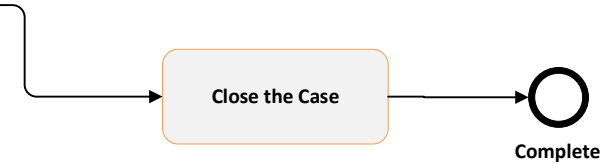
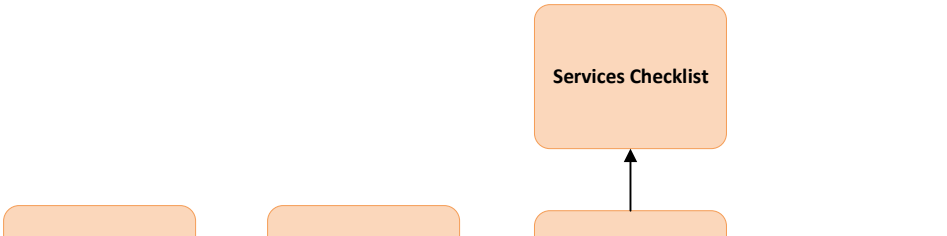
Cont A

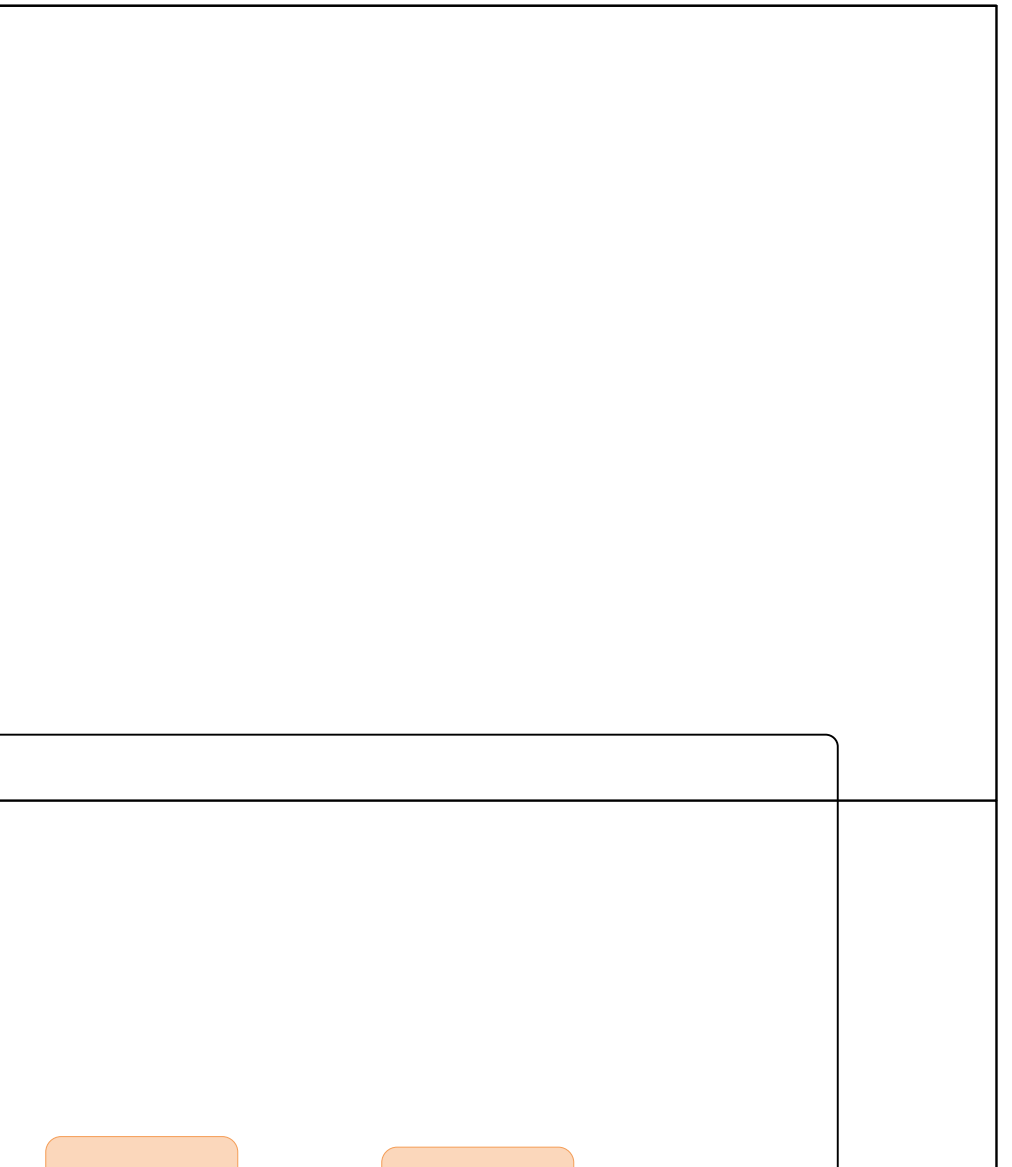
"Service Plan"
"Contact"

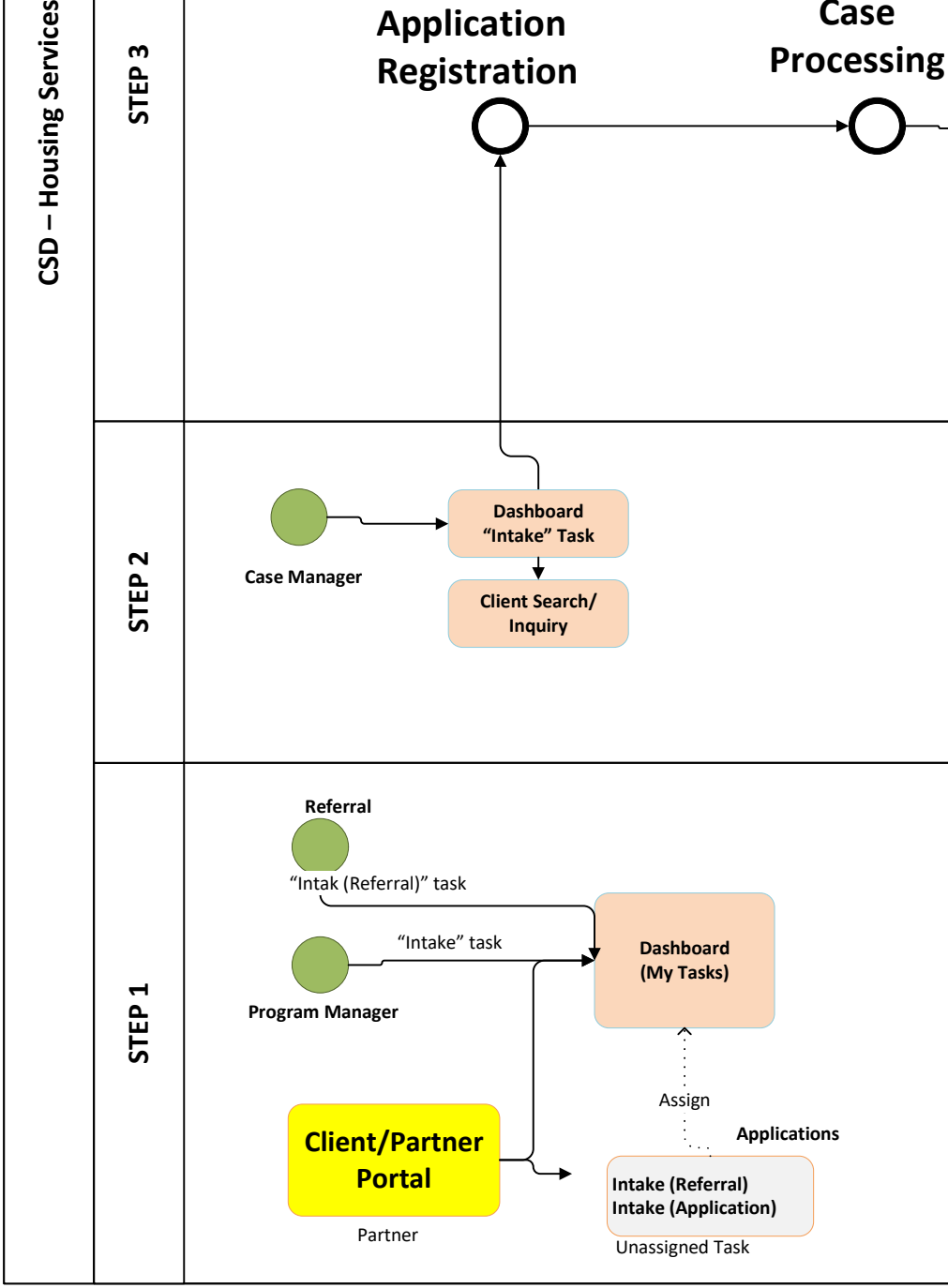

Forms/ Notices
Global Case Notes
Upload Supporting Documents
Service Plan Summary Add/Remove
Service Plans Summary
Service Plan Details Add/Update/Remove
Service/Activity Posting
Service Plan Details
Activity Posting
Milestone Posting
Contacts Summary Add/Remove
Contacts Summary
Contacts Details Add/Update/Remove
Contact Details

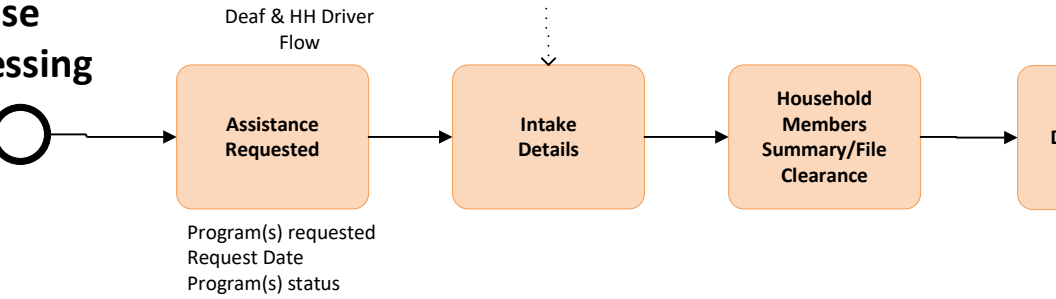

Address verification
Integration Services
Deaf & HH Driver Flow

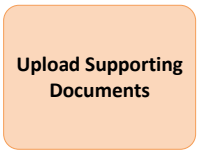

Close the Case
Complete

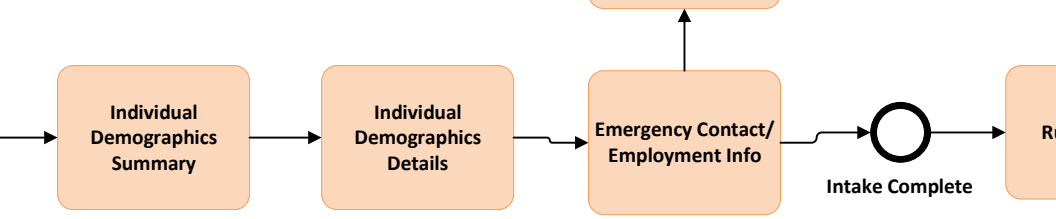

Services Checklist

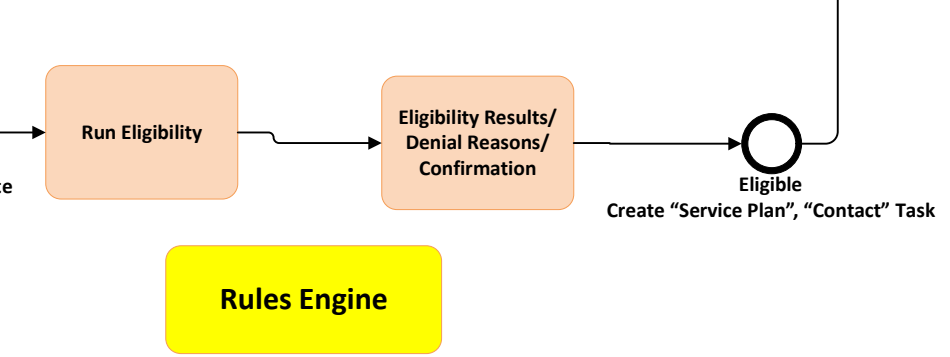


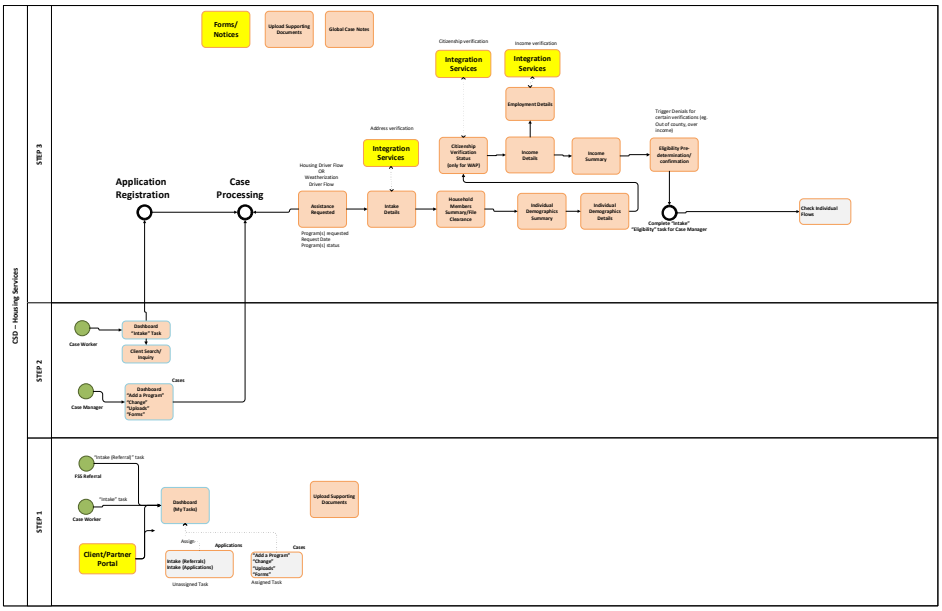

CSD – Housing Services
STEP 3
Application Registration
Case Processing
STEP 2
Case Manager
Dashboard "Intake" Task
Client Search/ Inquiry
STEP 1
Referral
"Intak (Referral)" task
"Intake" task
Program Manager
Dashboard (My Tasks)
Assign
Applications
Client/Partner Portal
Partner
Intake (Referral)
Intake (Application)
Unassigned Task

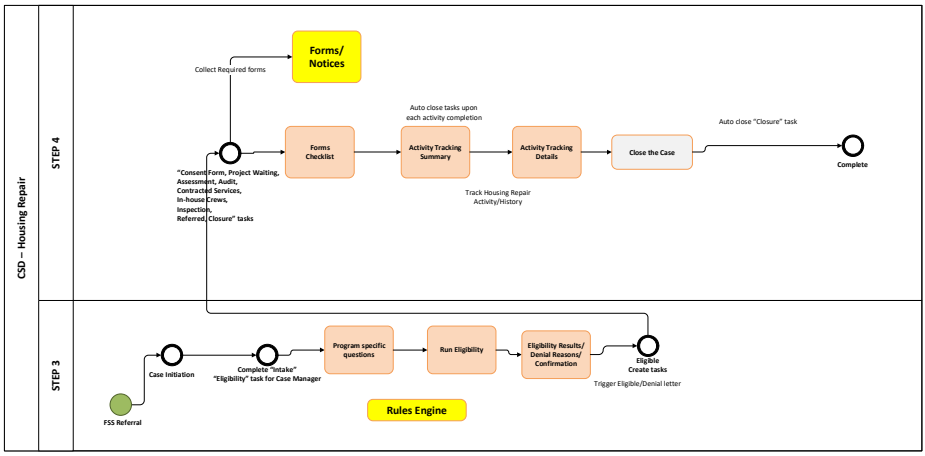

se
essing
Deaf & HH Driver Flow
Assistance Requested
Intake Details
Household Members Summary/File Clearance
Program(s) requested
Request Date
Program(s) status


Upload Supporting Documents


Individual Demographics Summary
Individual Demographics Details
Emergency Contact/ Employment Info
Intake Complete

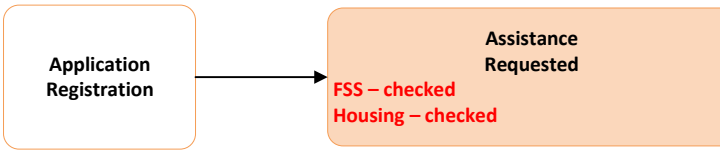

Run Eligibility
Eligibility Results/
Denial Reasons/
Confirmation
Eligible
Create “Service Plan”, “Contact” Task
Rules Engine

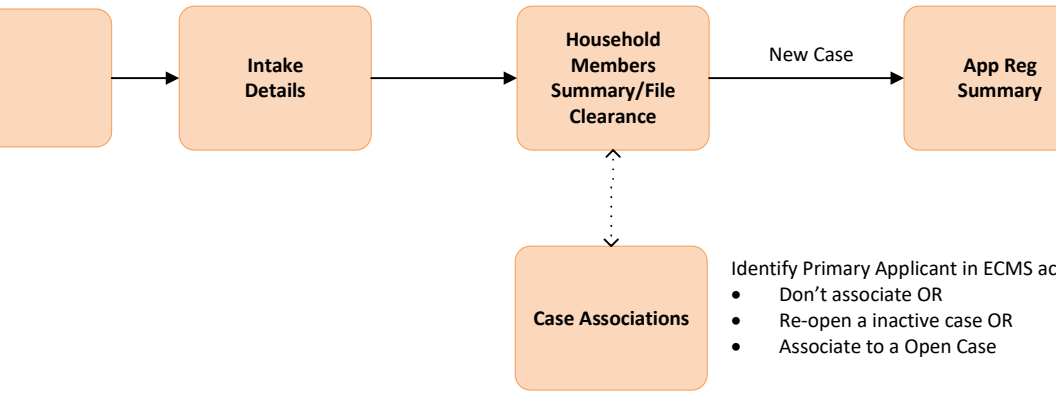

CSD – Housing Services
STEP 3
STEP 2
STEP 1
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Citizenship verification
Integration Services
Income verification
Integration Services
Employment Details
Address verification
Integration Services
Citizenship Verification Status (only for WAP)
Income Details
Income Summary
Trigger Denials for certain verifications (eg. Out of county, over income)
Eligibility Pre-determination/ confirmation
Application Registration
Case Processing
Housing Driver Flow OR Weatherization Driver Flow
Assistance Requested
Program(s) requested Request Date Program(s) status
Intake Details
Household Members Summary/Nte Clearance
Individual Demographics Summary
Individual Demographics Details
Complete "Intake" "Eligibility" task for Case Manager
Check Individual Flows
Case Worker
Dashboard "Intake" Task
Client Search/ Inquiry
Case Manager
Cases
Dashboard "Add a Program" "Change" "Uploads" "Forms"
"Intake (Referral)" task
FSS Referral
"Intake" task
Case Worker
Dashboard (My Tasks)
Upload Supporting Documents
Assign
Applications
Cases
Client/Partner Portal
Intake (Referrals) Intake (Applications)
"Add a Program" "Change" "Uploads" "Forms"
Unassigned Task
Assigned Task

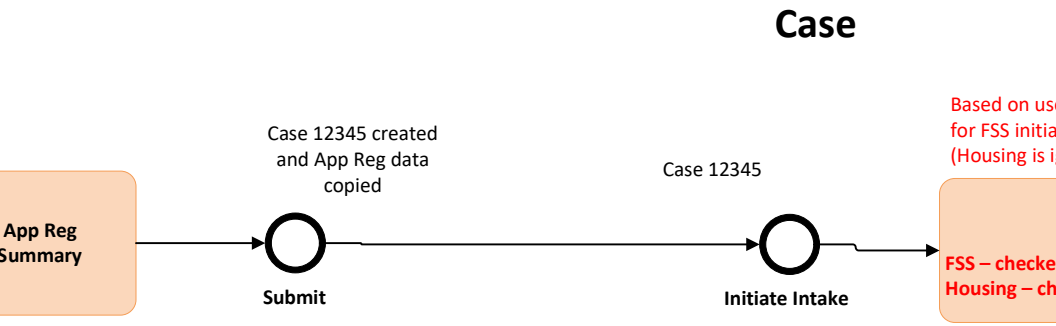

CSD – Housing Repair
STEP 4
STEP 3
Forms/
Notices
Collect Required forms
Auto close tasks upon
each activity completion
Auto close "Closure" task
Forms
Checklist
Activity Tracking
Summary
Activity Tracking
Details
Close the Case
Complete
"Consent Form, Project Waiting,
Assessment, Audit,
Contracted Services,
In-house Crews,
Inspection,
Referred, Closure" tasks
Track Housing Repair
Activity/History
Case Initiation
Complete "Intake"
"Eligibility" task for Case Manager
Program specific
questions
Run Eligibility
Eligibility Results/
Denial Reasons/
Confirmation
Eligible
Create tasks
Trigger Eligible/Denial letter
FSS Referral
Rules Engine

# New Applications

Application
12345, FSS + Housing



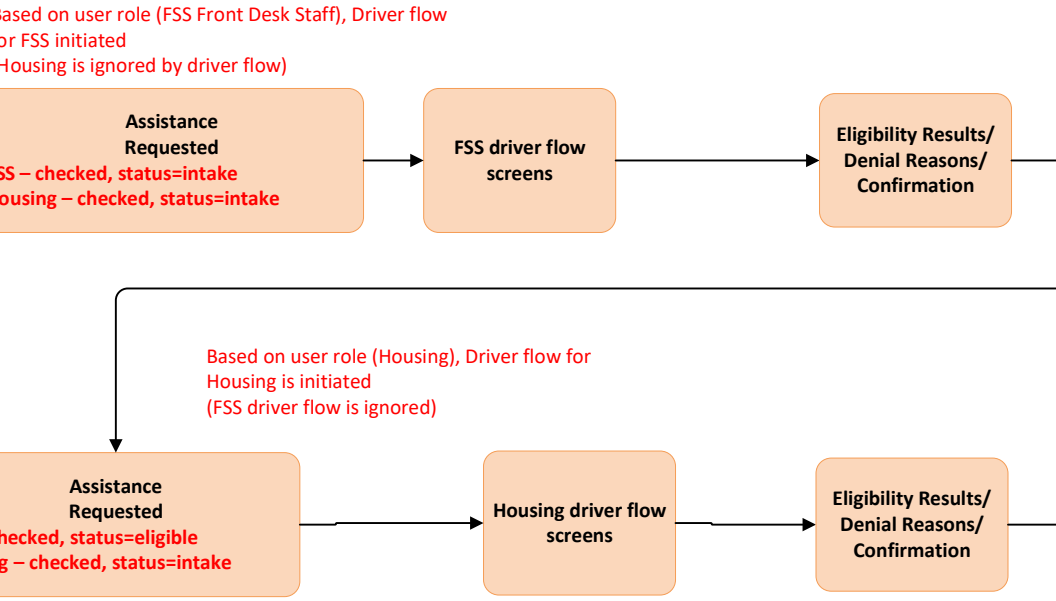

Intake Details
Household Members Summary/File Clearance
New Case
App Reg Summary
Case Associations
Identify Primary Applicant in ECMS ac
Don’t associate OR
Re-open a inactive case OR
Associate to a Open Case

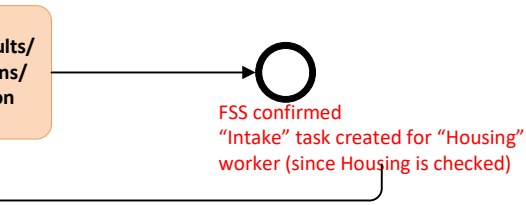


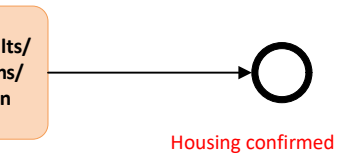

in ECMS active/inactive cases

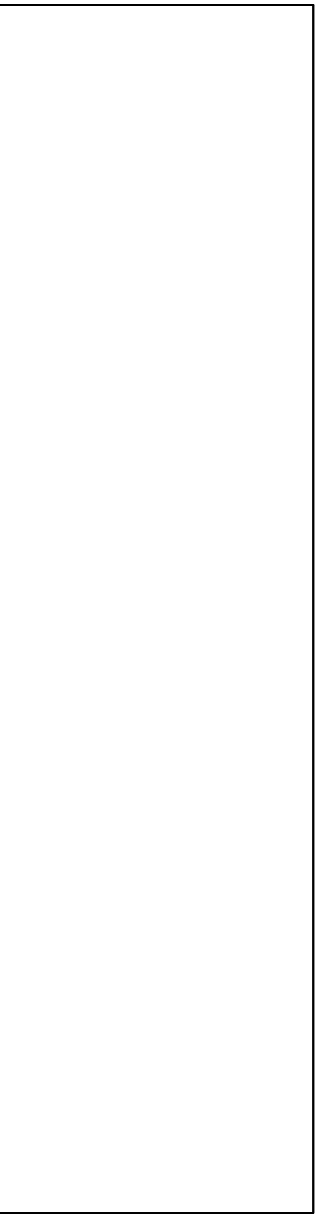
ase OR
Case

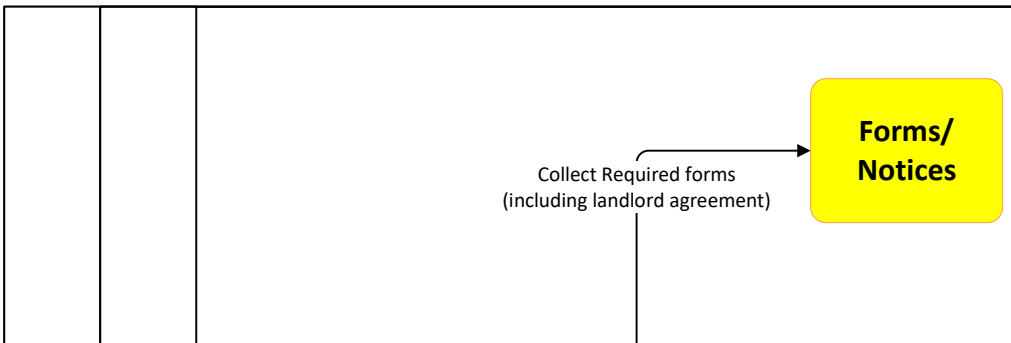
Ass
Rec
FSS – checked, sta
Housing – checked


Based on user role (FSS Front Desk Staff), Driver flow
or FSS initiated
Housing is ignored by driver flow)
Assistance
Requested
SS – checked, status=intake
ousing – checked, status=intake
FSS driver flow
screens
Eligibility Results/
Denial Reasons/
Confirmation
Based on user role (Housing), Driver flow for
Housing is initiated
(FSS driver flow is ignored)
Assistance
Requested
hecked, status=eligible
g – checked, status=intake
Housing driver flow
screens
Eligibility Results/
Denial Reasons/
Confirmation


ults/
ns/
on
FSS confirmed
“Intake” task created for “Housing”
worker (since Housing is checked)

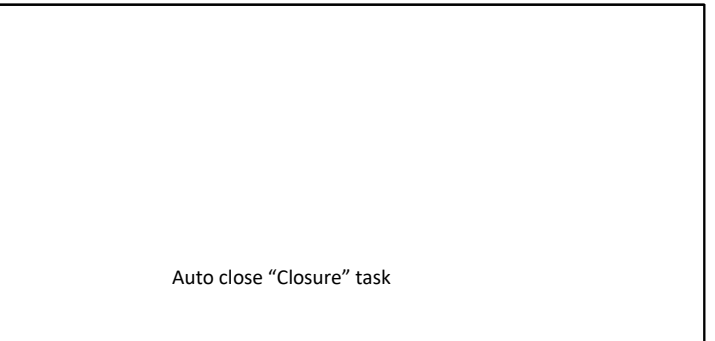

lts/
ns/
n
Housing confirmed

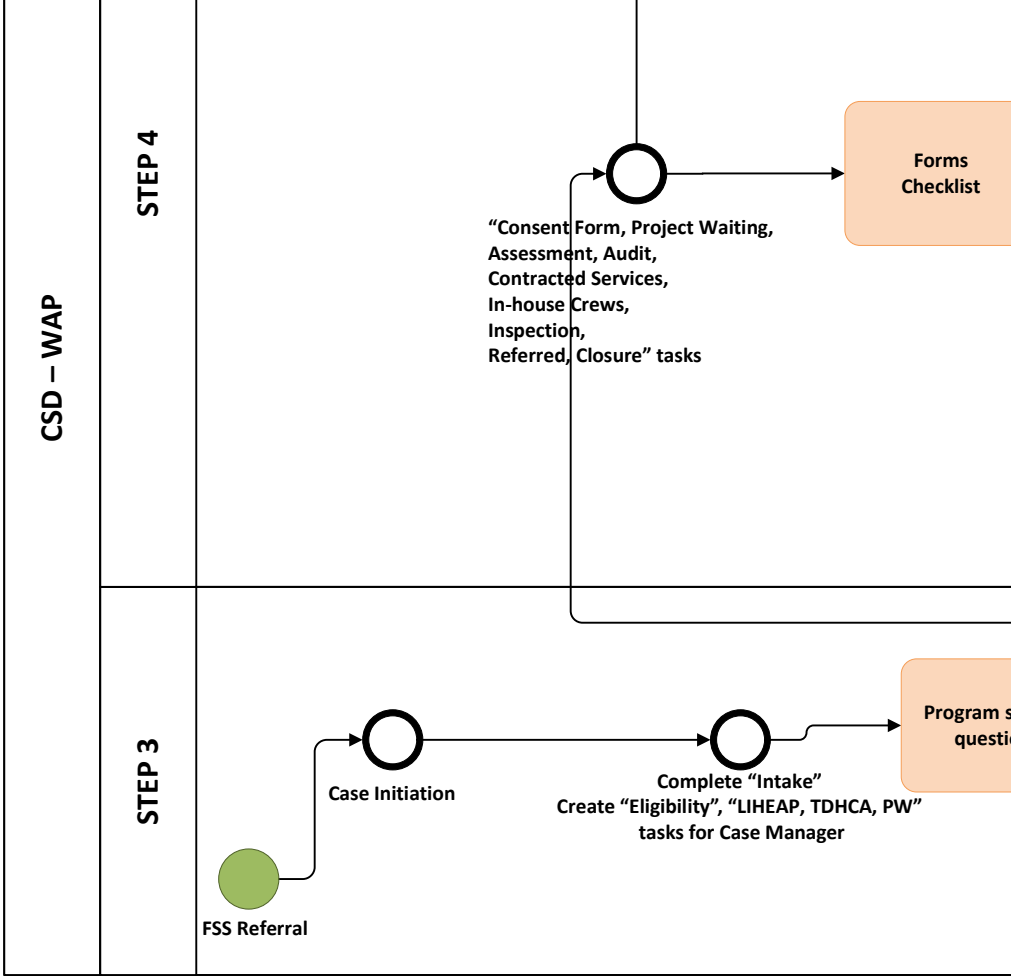


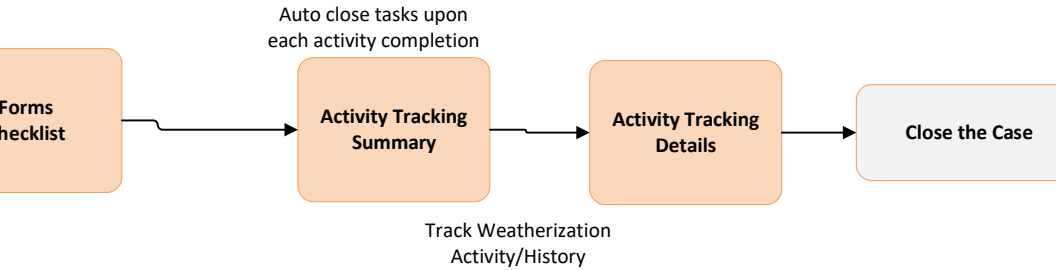

Collect Required forms
(including landlord agreement)
Forms/
Notices

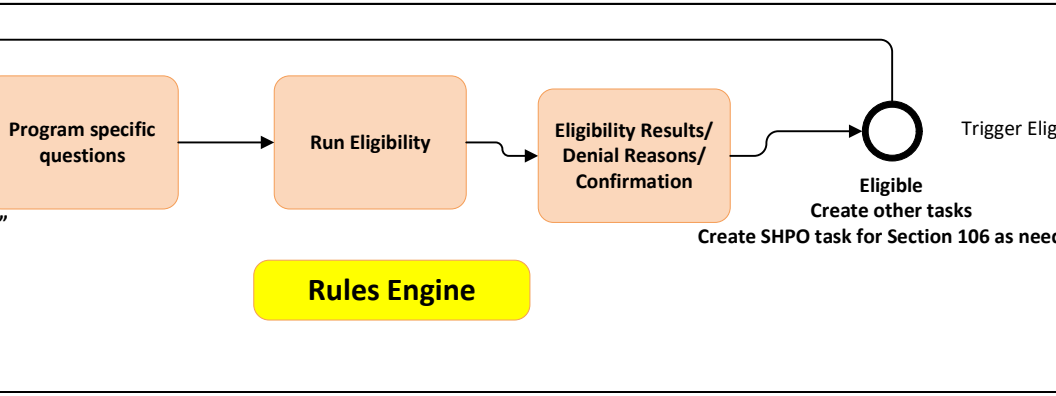
ns/
ces

Auto close tasks upon
each activity completion

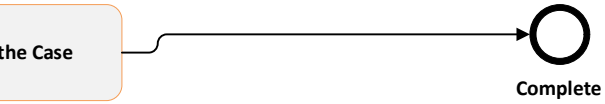

Auto close “Closure” task


CSD – WAP
STEP 4
STEP 3
Forms Checklist
"Consent Form, Project Waiting, Assessment, Audit, Contracted Services, In-house Crews, Inspection, Referred, Closure" tasks
Program s
questi
Case Initiation
Complete "Intake"
Create "Eligibility", "LIHEAP, TDHCA, PW" tasks for Case Manager
FSS Referral


Auto close tasks upon each activity completion
Forms hecklist
Activity Tracking Summary
Activity Tracking Details
Close the Case
Track Weatherization Activity/History


Program specific questions
Run Eligibility
Eligibility Results/ Denial Reasons/ Confirmation
Trigger Elig
Eligible
Create other tasks
Create SHPO task for Section 106 as need
Rules Engine

Auto close “Closure” task




Trigger Eligible/Denial letter

**ks**
**106 as needed**