NC Balance of State CoC **HMIS Users Meeting** September 2019



Pre-Meeting Quick Tip:

Did you know that HMIS can track a client's Case Manager contact?



Record the client's Case Manager

- 1. Go to a client's profile through *ClientPoint*
- 2. Click on the Case Managers tab
- 3. Click on Add Case Manager

Client - (90) D	oe, Jane					ſ
🧃 (90) Doe, Jane						
Release of Information	: Ends 08/05/2020		-S	witch to Another Hous	sehold Member- 🔻	Submit
Client Information			Service T	ransactions		
Summary Client	Profile Household	s ROI	Entry / Exit	Case Managers	Case Plans	Assessments
Case Managers	5					
Name	Provider	Phone Number		Start Date	End Date	e
Add Case Manage	r 🔶		No m	atches.		

Identify yourself as Case Manager

- Check the box of all current *Household Members* so that no matter which client is selected, the correct staff member will appear.
- 5. If the Case Manager will be you, select *Me* as the *Type*

Case Manager		×
Case Manag	er - (90) Doe, Jane	
 Household 	Members	
 To include each nan (20) Multiple (20) Doe lay 	Household members for this Case Manager, click the box besidenter of the selected. Ne. Only members from the SAME Household may be selected. Adults	e
(90) Doe, Jak (91) Doe, Jok	nn	
Type *	ServicePoint User Other	
Select User *	CE Central - Durham County - VoA Front Door (7612) -Select-	
Name *		
Title		
Phone Number		
Email Address		
Provider *	CE Central - Durham County - VoA Front Door (7612) 🔻	
Start Date *	09 / 08 / 2019 🧖 🔿 🦧	
End Date		
	Add Case Manager Car	icel



Select a different Case Manager

- 6. If the Case Manager will be another HMIS User, keep *Type* as *ServicePoint User*.
 - a) Next, change the *Select User* dropdown to the project where staff are assigned.
 - b) Then, select the name of staff who is the client's Case Manager.
- 7. Contact information will automatically appear if it is connected to the staff's HMIS profile.

Type *	● <u>ServicePoint User</u> ○ <u>Me</u> ○ <u>Other</u>
Select User *	CE Central - Durham County (7610)
	-Select-
Name *	Chiquita Joseph (9716)
Title	Jeremy Hiles (9710)
Phone Number	Lavette Wiliams (9709) Marsheia Frazier (9714)
Email Address	Meaghan Tyson (9713) Nicole Gaines (9712)
Provider *	Sasha Schontten (9717) Victor Joyner (9718)
Start Date *	Wynter Arrington (9715) Yvonne Roberts (9711)



Case Manager is saved!

- 8. The *Provider* will list your current EDA mode. Keep that to confirm the agency/project staff work for.
- 9. Click Add Case Manager to save.

Client - (9	90) Doe, Jane						ില
🧃 (90) Doe, Jane							
Release of Info	rmation: Ends 08/05/20	20			-Switch to Anot	her Household Membe	er- 🔻 Submit
Client Informati	ion			Service Tran	sactions		
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments
Case Ma	nagers						
	Name	Provider			Phone Numb	er Start Date	End Date
🦯 🥥 🧋	Chiquita Joseph	CE Central - Durh	am County -	VoA Front Door		09/08/2019	
Add Case N	Manager			Showing	1-1 of 1		



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System Updates HMIS@NCCEH assessments Hurricane Dorian HMIS Data Standards 2020 Updates HMIS CoC-APR and ESG-CAPER Report Updates

How can we help?

Enter Data As & Back Date modes NC County of Service & Client Location Reason for Leaving & Destination

What's Next



Welcome

Reminders

Your line is muted. We will unmute the line during Q&A pauses.

The chat box is available



Make sure you're counted!

Enter your name(s) so we know you are here

1 Click Attendees

- 2 Click on (me)
- 3 Click Edit your Name and Email...







System Updates

HMIS@NCCEH Assessments - Updates

Hurricane Dorian added to NC Natural Disaster sub-assessment

On Paper

In HMIS

NC NATU	RAL DISASTER/STORM – Are you experiencing homelessness due to a recent natural disaster/storm?	NC Natural Disaste	r/Storm
Yes	□ No □ Client doesn't know □ Client refused □ Data not collected		
nermission	re are resources and partners available during natural disasters/storms that can help you. Do we have your to use this information to coordinate with them to bein get you resources and assistance?	There are resources	
□ Yes	□ No □ Client doesn't know □ Client refused □ Data not collected	and partners available	
$\mathbf{+}$		during natural	
If YES: Wh	at natural disaster/storm caused you to evacuate and seek other shelter?	disastans (starms that	
Hurrica	ne Dorian Durricane Florence Durricane Matthew Dother:	disasters/storms that	
What NC C	ounty were you living in immediately prior to the natural	can help you. Do we	
disaster/st	orm?	to use this information	
		to use this mormation	
TYPE OF	PRIOR LIVING SITUATION – What was your living situations immediately prior to the natural disaster/storm?	to coordinate with	
≥.	Place not meant for habitation	them to help you get	
s seal	Emergency shelter including hotel or motel paid for with emergency shelter voucher		
les P Lit	Interim Housing	assistance?	
	Foster care home or foster care group home	What natural	
ā	Hospital or other residential non-psychiatric medical facility	disaster/storm caused	-Select-
tion	□ Jail, prison, or juvenile detention facility	you to evacuate and seek	Calact
stitu	Long-term care facility or nursing home	other shelter?	-Select-
<u> ۲</u>	Psychiatric hospital or other psychiatric facility	If the client said "Other"	Hurricane Donan - September 2019
	Substance abuse treatment facility or detox center	please enter the name of	Humiana Michael Ostahan 2010
	Hotel or motel paid for without emergency shelter voucher	the natural	Hurricane Michael - October 2018
1		disaster/storm in the	Hurricane Matthew - October 2016
		space provided.	Other (enter name below)

Client Location Update

• Rationale: To link client household data to the relevant CoC

Where's the \$\$\$?





Outreach Contact is now Current Living Situation

Street outreach projects only

- Rationale: To record each contact with people experiencing homelessness by street outreach and other service projects
 - $_{\odot}$ To provide information on the number of contacts required to engage the client
 - $\,\circ\,$ To document a current living situation as needed in any applicable project
- Instruction: Record the date and location of each interaction with a client



Domestic Violence History

- Rationale: To indicate whether heads of household and other adults served are survivors of domestic violence.
- Instruction: A record must be created as of the date of the project start, and updated during project enrollment





Housing Assessment at Exit

- Includes HOPWA and ESG Homeless Prevention projects
- Instruction: Record if the client maintained or changed housing situations and corresponding subsidy information

Но	using Assessment at Exit	 Only Prevention projects should answer these questions 		
	Housing Assessment at Exit	-Select-	G	
	If Able to maintain housing at entry, Subsidy Information	Able to maintain the housing they had at project entry Moved to new housing unit Moved in with family/friends on a temporary basis		
	If Moved to new housing unit, Subsidy information	Moved in with family/friends on a permanent basis Moved to a transitional or temporary housing facility or program Client became homeless - moving to a shelter or other place unfit for human habitation		
Di	sability Status	Client went to jail/prison Client died Client doesn't know		
	Does the client have * a disabling condition?	Client refused Data not collected		



HMIS CoC-APR and ESG-CAPER Report - Updates

New report required for Sage uploads on October 1st

- Finish up before then
- or wait for new HMIS report

Report Updates

- Q4a (HMIS Info) includes CoC code, Geocode, VSP, HMIS Software Name, Report Start & End Date.
- Q7 & Q8 PIT persons and households served now report only those in housing for PH projects
- Q19a3 removed for Client Cash Income Change by Start and Latest Status/Exit
- Q19b new Disabling Conditions and Income for Adults at Exit
- Q23a and 23b removed Destination includes all leavers regardless of time in project



How can we help?





Project: what funding supports these clients?

Alex entered the shelter program funded by State ESG dollars and must be recorded in the Emergency Shelter State ESG project





Project: what funding supports these clients?

If Alejandro uses a White Flag Emergency Shelter bed funded by local United Way instead, what would Alejandro's project be?





Project: what funding supports these clients?

If Alejandro uses a White Flag Emergency Shelter bed funded by local United Way instead, what would Alejandro's project be?





Clients are separated by HMIS project type and funding source





Imagine our HMIS region is a city



Welcome to HMIS @ NCCEH!



Each building is an Agency in our community





Each door is a project within an Agency





Each door has a security keypad





Data is secure and organized behind a door

Data must be within the right door to be accessible when you need it – for viewing, reporting, or sharing

Use Enter Data As (EDA) mode in HMIS to secure and locate data!





Data is secure and organized behind a door

If Enter Data As mode is not used, client data can look blank, be accidentally shared, or not appear in reports

Don't leave your data in front of the right door but in the hallway!





If data is left in the hallway



Visibility Problems

Client data cannot be seen in ServicePoint by those who should be able to see it.



Privacy and Security Problems

We are better able to ensure data is accessed only by those with permission when it is in the correct place.



Data Quality/Reporting Problems

Client data can be seen in ServicePoint, but is not pulled into reports.



Know your default Enter Data As mode



Default Enter Data As mode: Agency Level







Default Enter Data As mode: Project Level



Agency Name 🕂 County Name 🕂 Project Type/Name 🕂 Funding Source



Remember, the Project Level is where data should be entered



Agency Name 🕂 County Name 🕂 Project Type/Name 🕂 Funding Source



Enter a new Enter Data As Mode

If your Default EDA mode is not where your client entered, you can change your EDA mode





Enter a new Enter Data As Mode

Q	Quick Tip: you don't
-	have to Search.
	Projects are already
	listed below!

Enter Data As Provider Search				×				
Provider Search								
Search for Providers by using keywords from	Search for Providers by using keywords from the Provider Name or Description.							
Search			Show Advanced	Options				
Search Clear	Search Clear							
Provider Number								
Enter or scan a Provider ID number to search Provider ID #	h for that Sut	Provider. omit						
# A B C D E F G H I J H	C L M	NOPQ	RSTUVW	XYZ <u>AII</u>				
Provider	Level	Phone	Location	Last Updated				
Heading Home Housing - Rowan County - Emergency Shelter - Private (5)	Level 5	Unknown	Salisbury, NC 28147	01/03/2019				
Heading Home Housing - Rowan County - Emergency Shelter - State ESG (10)	Level 5	Unknown	Salisbury, NC 28147	01/03/2019				
Heading Home Housing - Rowan County - Rapid Re-Housing - ESG (6)	Level 5	Unknown	Salisbury, NC 28147	08/14/2018				



Enter a new Enter Data As Mode

Enter	Data As Provider Search				×			
Р	rovider Search							
Search	Search for Providers by using keywords from the Provider Name or Description.							
Search				Show Advanced	Options			
	Search Clear							
Р	rovider Number							
Enter o	r scan a Provider ID number to searc	h for that i	Provider.					
Provid	ler ID #	Sub	omit					
Р	rovider Search Results							
# A	BCDEFGHIJH	сьм	N O P Q	RSTUVW	X Y Z <u>All</u>			
	Provider	Level	Phone	Location	Last Updated			
0	Heading Home Housing - Rowan County - Emergency Shelter - Private (5)	Level 5	Unknown	Salisbury, NC 28147	01/03/2019			
0	Heading Home Housing - Rowan County - Emergency Shelter - State ESG (10)	Level 5	Unknown	Salisbury, NC 28147	01/03/2019			
0	Heading Home Housing - Rowan County - Rapid Re-Housing - ESG (6)	Level 5	Unknown	Salisbury, NC 28147	08/14/2018			
		1			1			



Add: Click the plus

sign to select the

right project for

your client!

You are in a new Enter Data As mode!





Hover over the new project name

You can hover to view the full name of the project you selected









Types of Data Entry

Delayed using Paper Forms

Live Data Entry during client interview







What is the right date for your data?



Wednesday

Data Collected

Client enters project, staff complete intake/assessment paperwork



Friday

Data Entered into HMIS

Data is entered into HMIS by a licensed user



What is the right date for your data?





Why is timeliness important?

More Accurate – the more time that passes, the less accurate the data

- Missing or inaccurate data could be found on paper forms, but the client maybe already exited.
- Typos and mistakes are made more often.

More Useful – when data is up-to-date, everyone is better off.

- Clients can get the referrals they need.
- Agencies know who they serving at any time and can reduce trackers.
- CoCs can report on data with confidence.



How to enter data with the right date?

Back Date mode allows HMIS users to select the correct date





How to enter data with the right date?







How to enter data with the right date?



The top of the screen turns yellow when you are in Back Date mode.



How do you fix data if you enter if for the wrong EDA or Back Date mode?

- □ You don't, it doesn't really matter
- Re-enter the data with correct modes
- Switch a drop-down menu to the right project or a date field to the correct day



How do you fix data if you enter if for the wrong EDA or Back Date mode?

□ You don't, it doesn't really matter

Re-enter the data with correct modes

Switch a drop-down menu to the right project or a date field to the correct day







Don't forget NC County of Service!

What

The County in which a client receives your project's services



Collection Notes

The location of shelter, housing or supportive services indicates the County of Service at any given time.

2 10/01/2018	Private Pay Health Insurance	No			
Add			Showing 1-5 of 40	First Previous	Next Last
NC County of Service	Brunswick	▼G			
On the night before this assessment, what was	S				



Client Location

For Heads of Households: Which CoC is the \$\$\$ from?



Client Location

When would a client be served by our agencies/system but not be in our CoC?

- Found housing in a different CoC
- Found a job in a different CoC (you meet with client in another CoC)



Client Location Update

• Rationale: To link client household data to the relevant CoC

Where's the \$\$\$?





Client Location

Scroll down to find Client Location at Entry Assessment



Answer the questions below for the Head of Household and other adults



Homeless History

Prior Living Situation (Immediately Prior to Entry)

Place not meant for habitation (HUD)



Client Location

1

Scroll down to find Client Location at Interims (Update or Annuals)

	NC County of Service	Rowan 🔻 G	
	Answer the questions below for	the Head of Household and other adults	
	Client Location	NC-503 NC Balance of State CoC 🔹 G	
	Housing Move-in Date	03 / 01 / 2018 🧃 🔿 🦧 G	
]	Income & Sources		
	Income from Any Source	Yes (HUD) 🔻 G	



11

Room for Improvement: Missing Data

Data Collection methods

Which paper forms are used? (if not entering data directly)

Make sure to collect all required data elements based off the HMIS@NCCEH Assessments on <u>ncceh.org/hmis/administrative</u>.

Who is trained to collect data?

Sometimes staff speaking to clients have not received training from their Agency Admin (or NCCEH) – make sure they know what to collect and why.

Where does data collection take place?

Consider how the physical location of client interviews and corresponding forms impacts your ability to ask the right questions.



Reason for Leaving

Why has this client's project exit occurred?

Common Reasons for Leaving:

- *Completed program* is when a client leaves after moving into housing with support from the project.
- Left for housing opp. before completing program means that the client found other shelter or housing without support from the project.
- *Does not or no longer qualifies for the program* is used when the client can no longer use core services (financial or supportive) and is no longer eligible for the project.
- Unknown/Disappeared is used when project staff do not know the reason for leaving.



Reason for Leaving

Edit Exit Data - (15) Sta	r, Skip	×
Household Members		
🚺 To upd	ate Household members for this Exit Data, click the box beside each name.	
(2) Child w/single pare	nt	
Edit Evit Data - (15) Sta	r Skin	
	r, skip	
Exit Date *	09 / 16 / 2019 🥂 🕄 9 🔻 : 55 🔻 : 24 🗸 AM 🔻	
Reason for Leaving	-Select-	
If "Other", Specify	-Select-	
Destination *	Criminal activity / violence	•
If "Other", Specify	Disagreement with rules/persons	
Notes	Left for housing opp. before completing program Needs could not be met	
	Does not or no longer qualifies for program	
	Non-compliance with program Non-payment of rent	
	Other	-//
	Reached maximum time allowed	



What

Identify where a client will stay immediately exiting a project

If Henrietta exits, where will she sleep that night?





Collection Notes

Use multiple sources for a better understanding and more accurate data.

If no information (after triangulating) is available, use No Exit Interview Completed.





Who All clients

1	τ.	н.	
Т			

Data Collection Stage At project exit



Special Reminder Other will be considered incomplete Keep a copy of our <u>Exit Destination Guide</u> available to consult Missing data is always better than inaccurate data!



On the paper assessment

DESTINATION – Where will the client be staying right after leaving this project?			
Temporary Homeless		Place not meant for habitation	
		Emergency shelter, including hotel or motel paid for with emergency shelter voucher	
		Moved from one HOPWA funded project To HOPWA TH	
		Transitional Housing for homeless persons (including homeless youth)	
Temporary Non- Homeless		Hotel or motel paid for without emergency shelter voucher	
		Residential project or halfway house with no homeless criteria	
		Staying or living with family, temporary tenure (room, apartment, or house)	
		Staying or living with friends, temporary tenure (room, apartment, or house)	
Institutional		Psychiatric hospital or other psychiatric facility	
		Substance abuse treatment facility or detox center	
		Hospital or other residential non-psychiatric medical facility	
		Jail, prison, or juvenile detention facility	
		Foster care home or foster care group home	
		Long-term care facility or nursing home	



On the paper assessment

Permanent	Rental by client, with RRH or equivalent subsidy
	Permanent housing (other than RRH) for formerly homeless persons
	Moved from one HOPWA funded project to HOPWA PH
	Rental by client, with GPD TIP housing subsidy
	Rental by client, with VASH housing subsidy
	Rental by client, with other ongoing housing subsidy
	Owned by client, with other ongoing housing subsidy
	Rental by client, no ongoing housing subsidy
	Owned by client, no ongoing housing subsidy
	Staying or living with family, permanent tenure
	Staying or living with friends, permanent tenure
Other	Deceased
	Other
	Client doesn't know (CDK)
	Client refused (CR)
	No exit interview completed (Data Not Collected, DNC)



lit Exit Data - (15) Star, Skip		
Household Members		
🚺 To upd	ate Household members for this Exit Data, click the box beside each name.	
(2) Child w/single pare	nt	
✓ (15) Star, Skip		
Edit Exit Data - (15) Sta	r, Skip	
Exit Date *	09 / 16 / 2019 🧃 🔿 💐 9 ▼ : 55 ▼ : 24 ▼ AM ▼	
Reason for Leaving	Completed program 🔻	
If "Other", Specify		
Destination *	-Select-	•
If "Other", Specify	-Select-	^
Notes	Emergency shelter, including hotel or motel paid for with emergency shelter voucher (HUD) Foster care home or foster care group home (HUD) Hospital or other residential non-psychiatric medical facility (HUD) Hotel or motel paid for without emergency shelter voucher (HUD) Jail, prison or juvenile detention facility (HUD) Long-term care facility or nursing home (HUD) Moved from one HOPWA funded project to HOPWA PH (HUD) Moved from one HOPWA funded project to HOPWA TH (HUD) Owned by client, no ongoing housing subsidy (HUD) Owned by client, with ongoing housing subsidy (HUD) Permanent housing (other than RRH) for formerly homeless persons (HUD) Place not meant for habitation (HUD) Porteit hospital or other psychiatric facility (HUD) Permanent housing or other psychiatric facility (HUD) Porteit hospital or other psychiatric facility (HUD)	
	Rental by client, no ongoing housing subsidy (HUD) Rental by client, with RRH or equivalent subsidy (HUD)	



Spotlight on HMIS Guides

Go to ncceh.org/hmis/trainings for Additional Resources



What's Next

What's Next Calendar

Due	Report/Event Name	
Sept 19 th	NC BoS CoC HMIS Users Meeting	
Oct 1 st	Federal Fiscal Year Begins! HUD HMIS Data Standards and HMIS Report updates	
Oct 17 th	NC BoS CoC HMIS Users Meeting	
Nov 21 st	NC BoS CoC HMIS Users Meeting	
ТВА	Longitudinal System Analysis and System Performance Measures Reports	



ncceh.org/hmis

access local support for NC Balance of State, Durham, & Orange CoCs

919.410.6997 or hmis@ncceh.org

helpdesk for local support

