

Durham CoC HMIS Users Meeting

September 2019



NC COALITION to
HOMELESSNESS end

Agenda

September 2019

System Updates

HMIS@NCCEH assessments

Hurricane Dorian

Homeless History

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

Pre-Meeting Tip



NCCEH



System Updates

HMIS@NCCEH Assessments - Updates

Hurricane Dorian added to NC Natural Disaster sub-assessment

On Paper

| | | | | |
|---|--|--|---|---|
| NC NATURAL DISASTER/STORM – Are you experiencing homelessness due to a recent natural disaster/storm? | | | | |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Client doesn't know | <input type="checkbox"/> Client refused | <input type="checkbox"/> Data not collected |
| If YES: There are resources and partners available during natural disasters/storms that can help you. Do we have your permission to use this information to coordinate with them to help get you resources and assistance? | | | | |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Client doesn't know | <input type="checkbox"/> Client refused | <input type="checkbox"/> Data not collected |
| If YES: What natural disaster/storm caused you to evacuate and seek other shelter? | | | | |
| <input checked="" type="checkbox"/> Hurricane Dorian | <input type="checkbox"/> Hurricane Florence | <input type="checkbox"/> Hurricane Matthew | <input type="checkbox"/> Other: | |
| What NC County were you living in immediately prior to the natural disaster/storm? | | | | |
| | | | | |
| TYPE OF PRIOR LIVING SITUATION – What was your living situations immediately prior to the natural disaster/storm? | | | | |
| Literally Homeless | <input type="checkbox"/> Place not meant for habitation | | | |
| | <input type="checkbox"/> Emergency shelter, including hotel or motel paid for with emergency shelter voucher | | | |
| | <input type="checkbox"/> Interim Housing | | | |
| Institutional | <input type="checkbox"/> Foster care home or foster care group home | | | |
| | <input type="checkbox"/> Hospital or other residential non-psychiatric medical facility | | | |
| | <input type="checkbox"/> Jail, prison, or juvenile detention facility | | | |
| | <input type="checkbox"/> Long-term care facility or nursing home | | | |
| | <input type="checkbox"/> Psychiatric hospital or other psychiatric facility | | | |
| | <input type="checkbox"/> Substance abuse treatment facility or detox center | | | |
| <input type="checkbox"/> Hotel or motel paid for without emergency shelter voucher | | | | |

In HMIS

NC Natural Disaster/Storm

There are resources and partners available during natural disasters/storms that can help you. Do we have your permission to use this information to coordinate with them to help you get resources and assistance?

What natural disaster/storm caused you to evacuate and seek other shelter?

If the client said "Other", please enter the name of the natural disaster/storm in the space provided.

Yes (HUD) ▼ G

-Select- ▼ G

Hurricane Dorian - September 2019

Hurricane Florence - September 2018

Hurricane Michael - October 2018

Hurricane Matthew - October 2016

Other (enter name below)



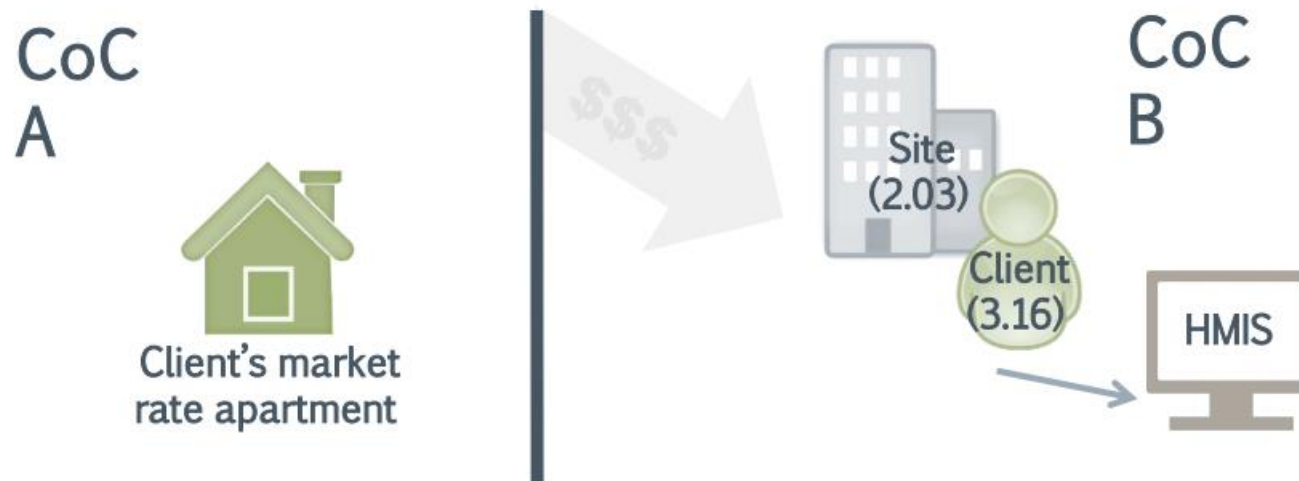
NCCEH

HMIS Data Standards 2020 - Updates

Client Location Update

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

Where's the \$\$\$?



HMIS Data Standards 2020 - Updates

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
 - To provide information on the number of contacts required to engage the client
 - To document a current living situation as needed in any applicable project
- Instruction: Record the date and location of each interaction with a client



HMIS Data Standards 2020 - Updates

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



HMIS Data Standards 2020 - Updates

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

Housing Assessment at Exit - Only Prevention projects should answer these questions

| | |
|---|--|
| Housing Assessment at Exit | -Select- |
| If Able to maintain housing at entry, Subsidy Information | -Select- |
| If Moved to new housing unit, 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 |
| | 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 |
| | Client went to jail/prison |
| | Client died |
| | Client doesn't know |
| | Client refused |
| | Data not collected |
| Disability Status | |
| Does the client have a disabling condition? * | |

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?

Before you enter data: Projects



NCCEH

What's tracked behind the scenes?

Project: what funding supports these clients?

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



What's tracked behind the scenes?

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?



What's tracked behind the scenes?

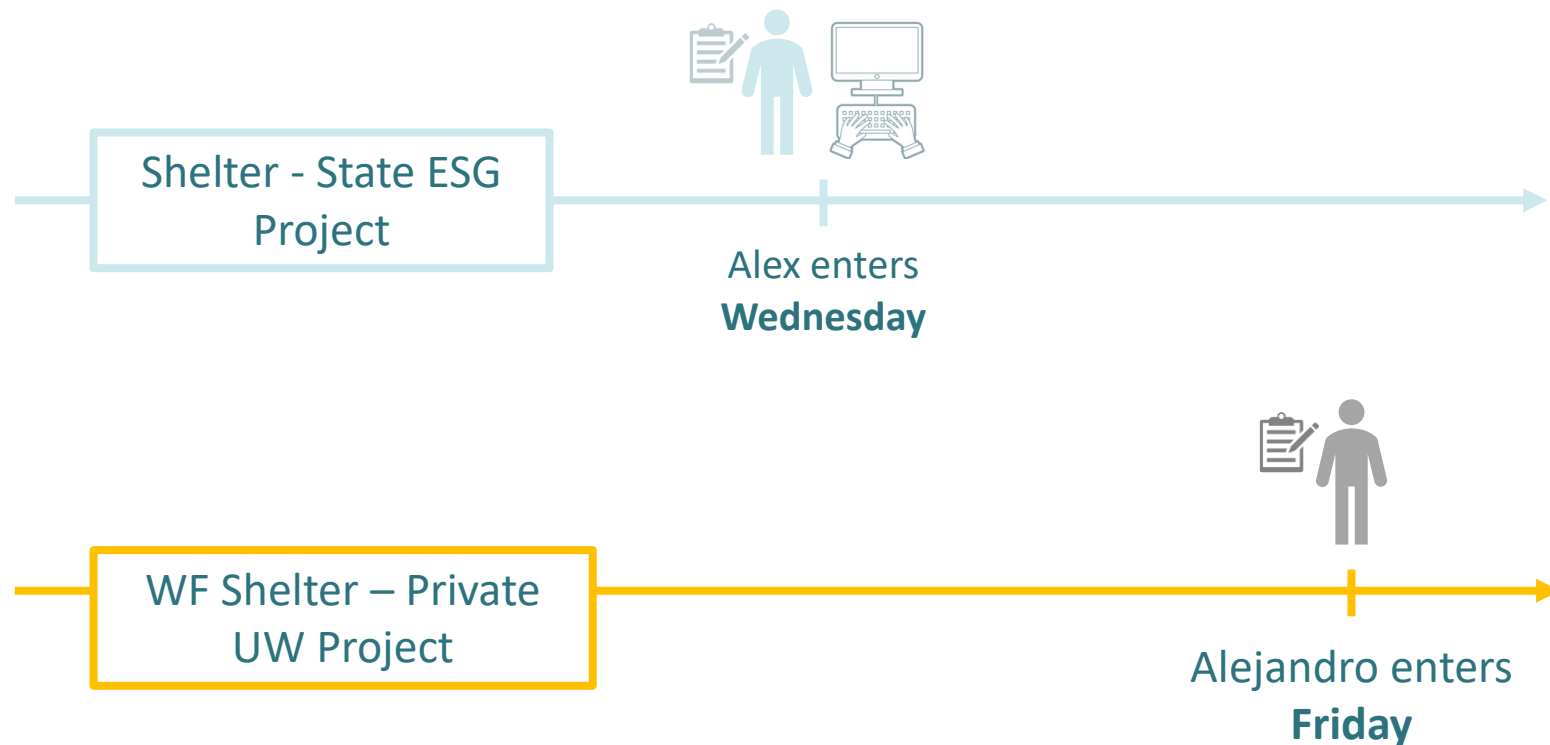
Project: what funding supports these clients?

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



What's tracked behind the scenes?

Clients are separated by HMIS project type and funding source



Imagine our HMIS region is a city

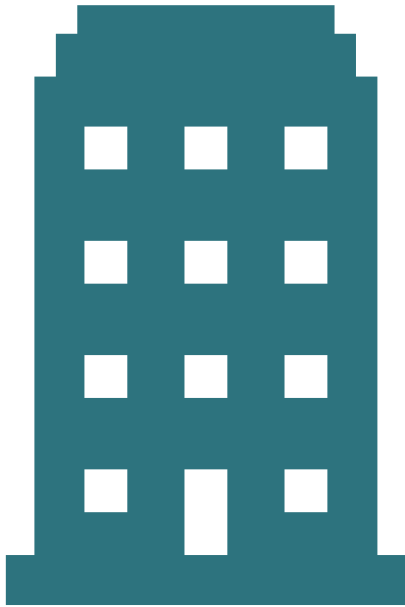


Welcome to HMIS @ NCCEH!

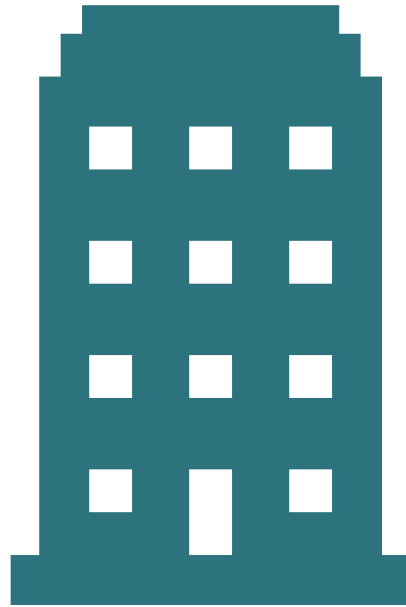


NCCEH

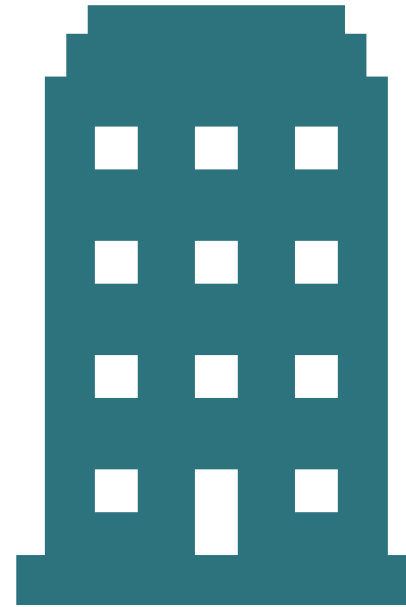
Each building is an Agency in our community



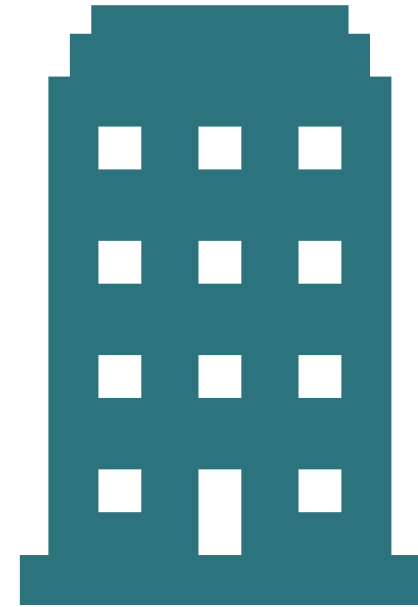
Agency A



Agency B



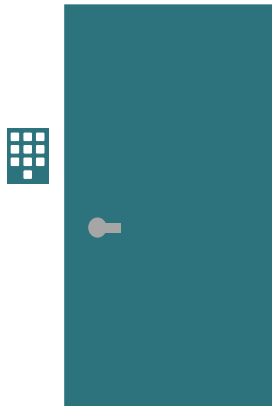
Agency C



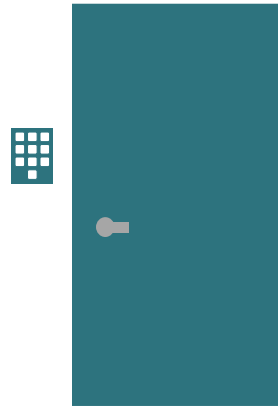
Agency D



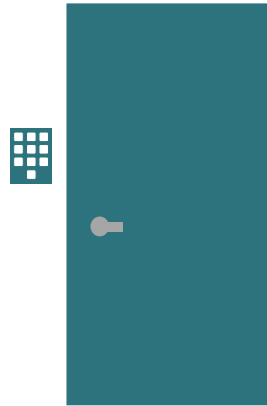
Each door is a project within an Agency



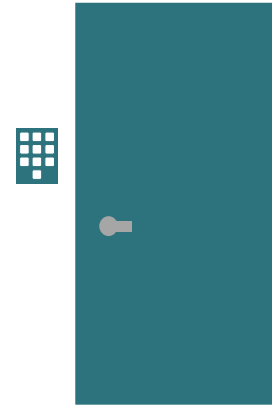
Emergency
Shelter
- State ESG



Transitional
Housing
- Private



Rapid Re-
Housing
- CoC



Permanent
Supportive
Housing
- CoC



Each door has a security keypad

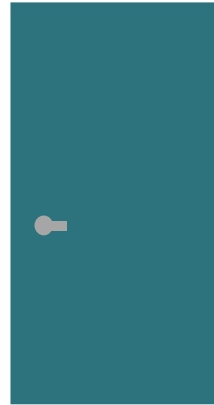
This security
is called
Enter Data As
in HMIS



Emergency
Shelter
- State ESG



Transitional
Housing
- Private



Rapid Re-
Housing
- CoC



Permanent
Supportive
Housing
- CoC



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

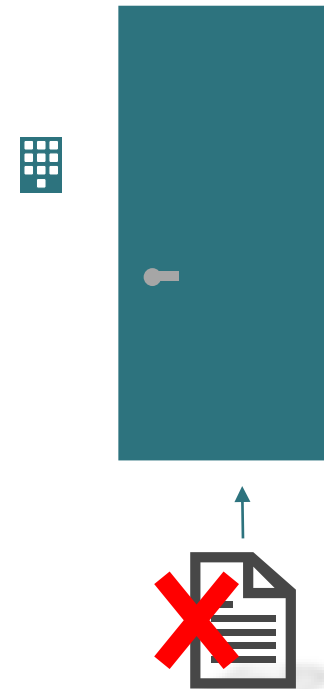
Use Enter Data As (EDA) mode in HMIS to secure and locate data!



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



SERVICEpoint
Connecting Your Community.

Helen Housing Agency Admin

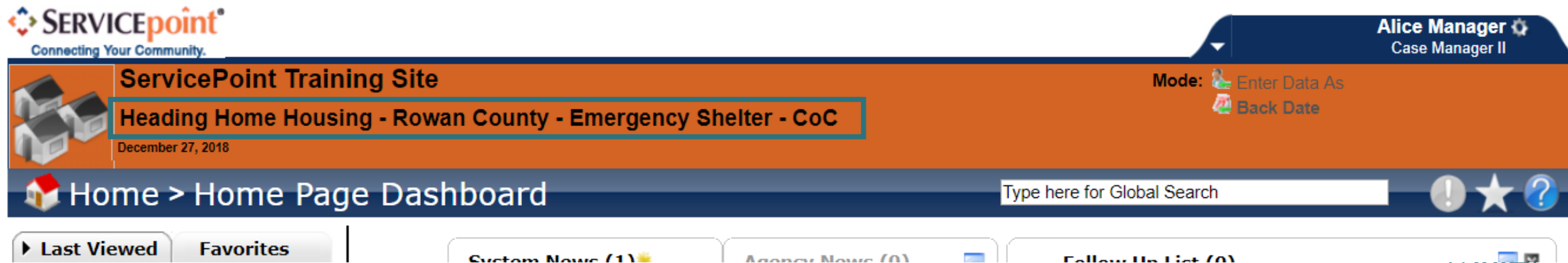
ServicePoint Training Site
Heading Home Housing - Rowan County
December 27, 2018

Mode: Shadow
Enter Data As
Back Date

Home > Home Page Dashboard

Type here for Global Search

Last Viewed Favorites System News (1) Agency News (0) Follow Up List (0)



SERVICEpoint
Connecting Your Community.

Alice Manager Case Manager II

ServicePoint Training Site
Heading Home Housing - Rowan County - Emergency Shelter - CoC
December 27, 2018

Mode: Enter Data As
Back Date

Home > Home Page Dashboard

Type here for Global Search

Last Viewed Favorites System News (1) Agency News (0) Follow Up List (0)

Default Enter Data As mode: Agency Level

The screenshot displays the ServicePoint web application interface. At the top left is the ServicePoint logo with the tagline "Connecting Your Community." The top right corner shows the user's name "Helen Housing" and role "Agency Admin" with a gear icon. The main header area is orange and contains the text "ServicePoint Training Site" and "Heading Home Housing - Rowan County" with a date of "December 27, 2018". A dropdown menu for "Mode:" is open, showing three options: "Shadow", "Enter Data As" (which is highlighted), and "Back Date". Below the header is a dark blue navigation bar with "Home > Home Page Dashboard" and a search box labeled "Type here for Global Search". At the bottom, there are several widget tabs: "Last Viewed", "Favorites", "System News (1)", "Agency News (0)", and "Follow Up List (0)".

Agency Name



County Name



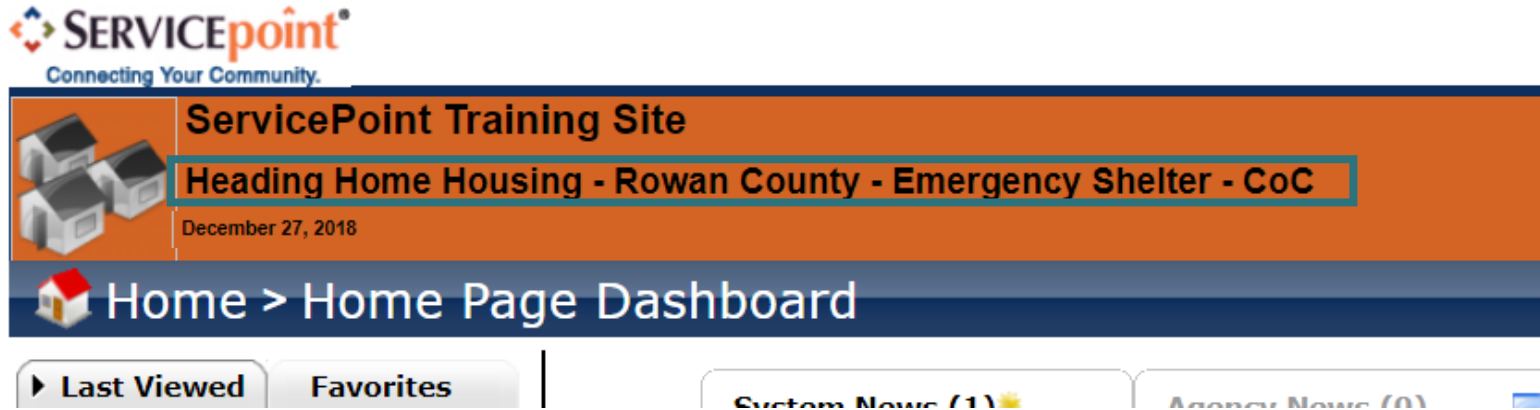
NCCEH

Default Enter Data As mode: Project Level

The screenshot displays the ServicePoint Training Site interface. At the top left is the ServicePoint logo with the tagline "Connecting Your Community." The main header area is orange and contains the text "ServicePoint Training Site" and "Heading Home Housing - Rowan County - Emergency Shelter - CoC" with a date of "December 27, 2018". On the right side of the header, the user is identified as "Alice Manager Case Manager II" and the "Mode" is set to "Enter Data As". Below the header is a navigation bar with "Home > Home Page Dashboard" and a search box labeled "Type here for Global Search". At the bottom, there are several widget buttons: "Last Viewed", "Favorites", "System News (1)", "Agency News (0)", and "Follow Us List (0)".

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

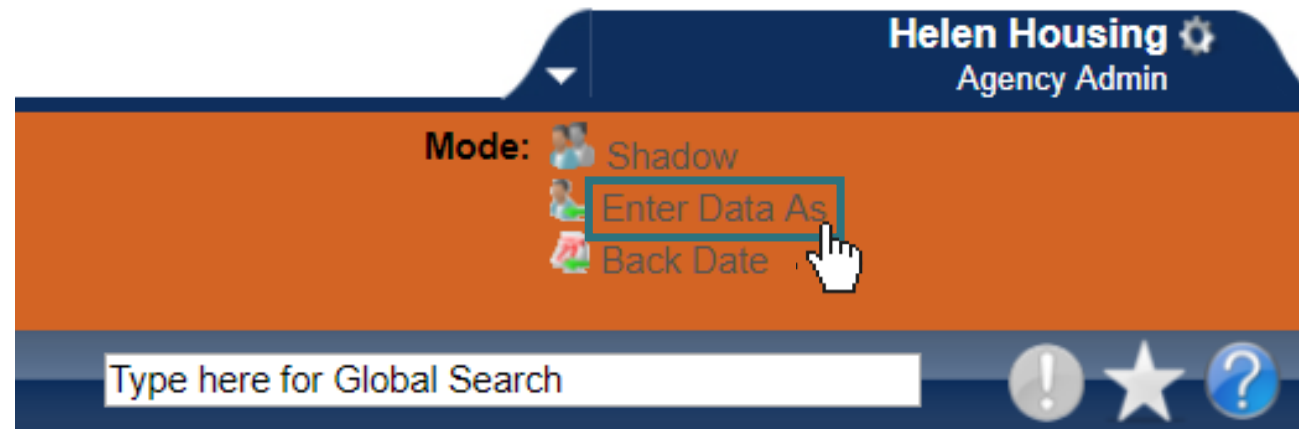
Remember, the Project Level is where data should be entered



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



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 the Provider Name or Description.

Search

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Provider Search Results

| # | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All |
|--|--|----------|---------|---------|---------------------|------------|--------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-----|
| | | Provider | | Level | Phone | Location | Last Updated | | | | | | | | | | | | | | | | | | | | |
| <input home="" icon"="" type="button" value="+</input></td><td> | Heading Home Housing - Rowan County - Emergency Shelter - Private (5) | | Level 5 | Unknown | Salisbury, NC 28147 | 01/03/2019 | | | | | | | | | | | | | | | | | | | | | |
| <input home="" icon"="" type="button" value="+</input></td><td> | Heading Home Housing - Rowan County - Emergency Shelter - State ESG (10) | | Level 5 | Unknown | Salisbury, NC 28147 | 01/03/2019 | | | | | | | | | | | | | | | | | | | | | |
| <input home="" icon"="" type="button" value="+</input></td><td> | 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

Provider Search

Search for Providers by using keywords from the Provider Name or Description.




Search

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Provider Search Results

| # | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All |
|--|--|---|---------|---------|---------------------|--------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|-----|
| | Provider | | Level | Phone | Location | Last Updated | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="+"/>  | Heading Home Housing - Rowan County - Emergency Shelter - Private (5) | | Level 5 | Unknown | Salisbury, NC 28147 | 01/03/2019 | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="+"/>  | Heading Home Housing - Rowan County - Emergency Shelter - State ESG (10) | | Level 5 | Unknown | Salisbury, NC 28147 | 01/03/2019 | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="+"/>  | Heading Home Housing - Rowan County - Rapid Re-Housing - ESG (6) | | Level 5 | Unknown | Salisbury, NC 28147 | 08/14/2018 | | | | | | | | | | | | | | | | | | | | | |



Add: Click the plus sign to select the right project for your client!



You are in a new Enter Data As mode!



Helen Housing Agency Admin



ServicePoint Training Site
Heading Home Housing - Rowan County
December 27, 2018

Mode: Shadow

Enter Data As Heading Home Housing ...

Back Date



Home > Home Page Dashboard

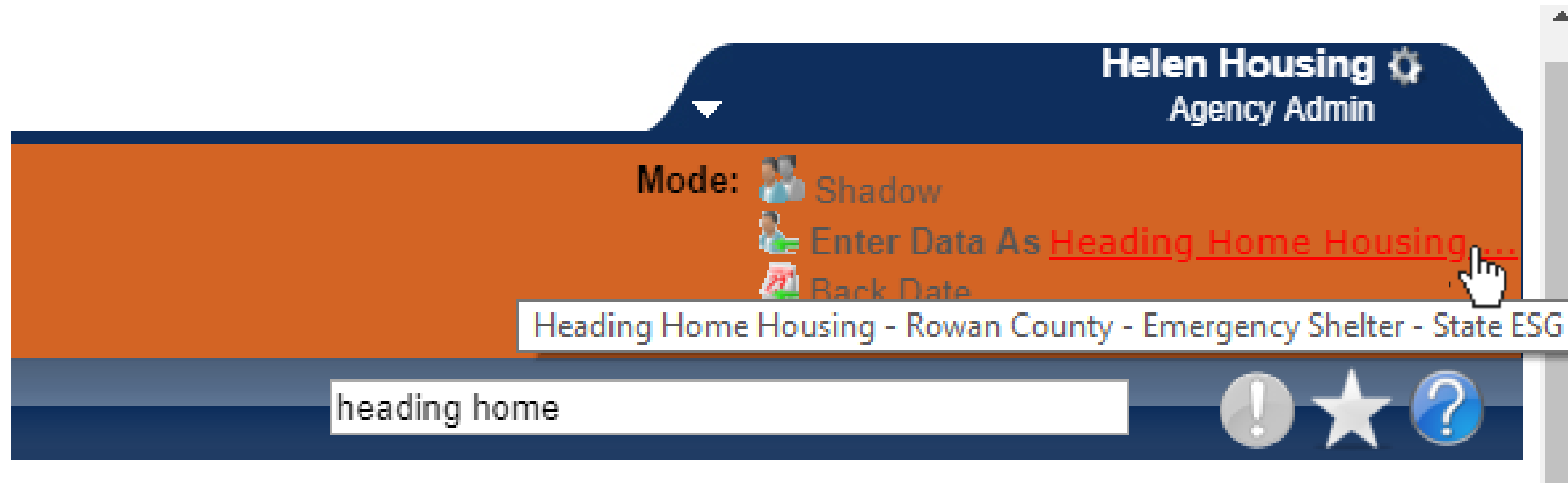
Type here for Global Search



NCCEH

Hover over the new project name

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



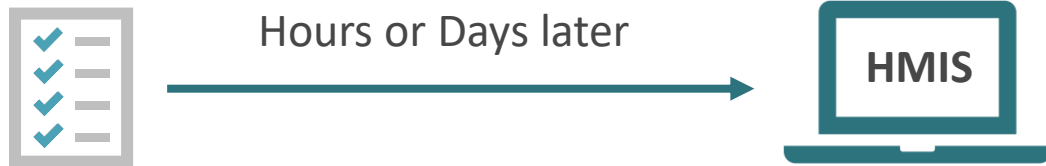
Before you enter data: Dates



NCCEH

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

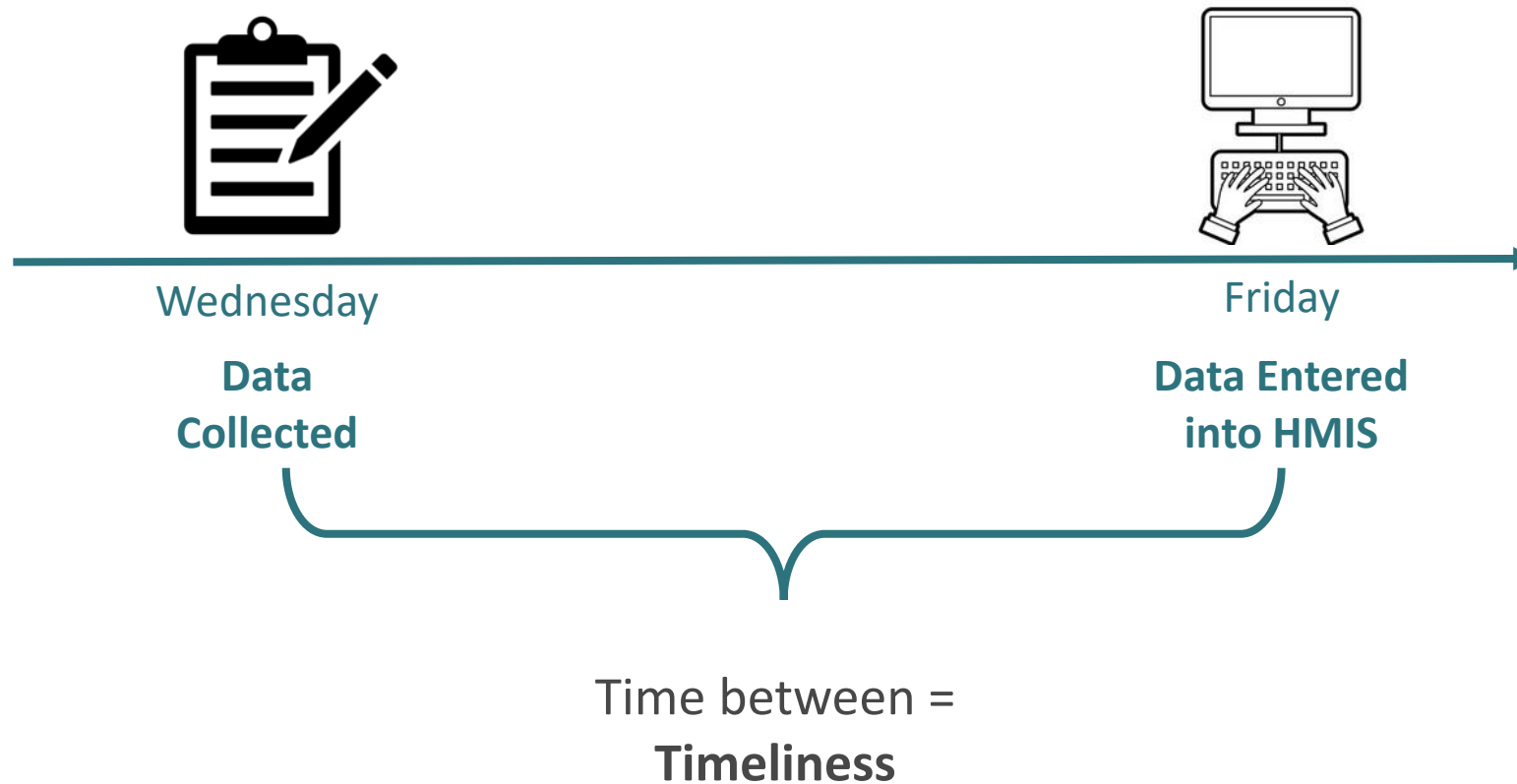
**Data Entered
into HMIS**

Data is entered into HMIS by a licensed user



NCCEH

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.

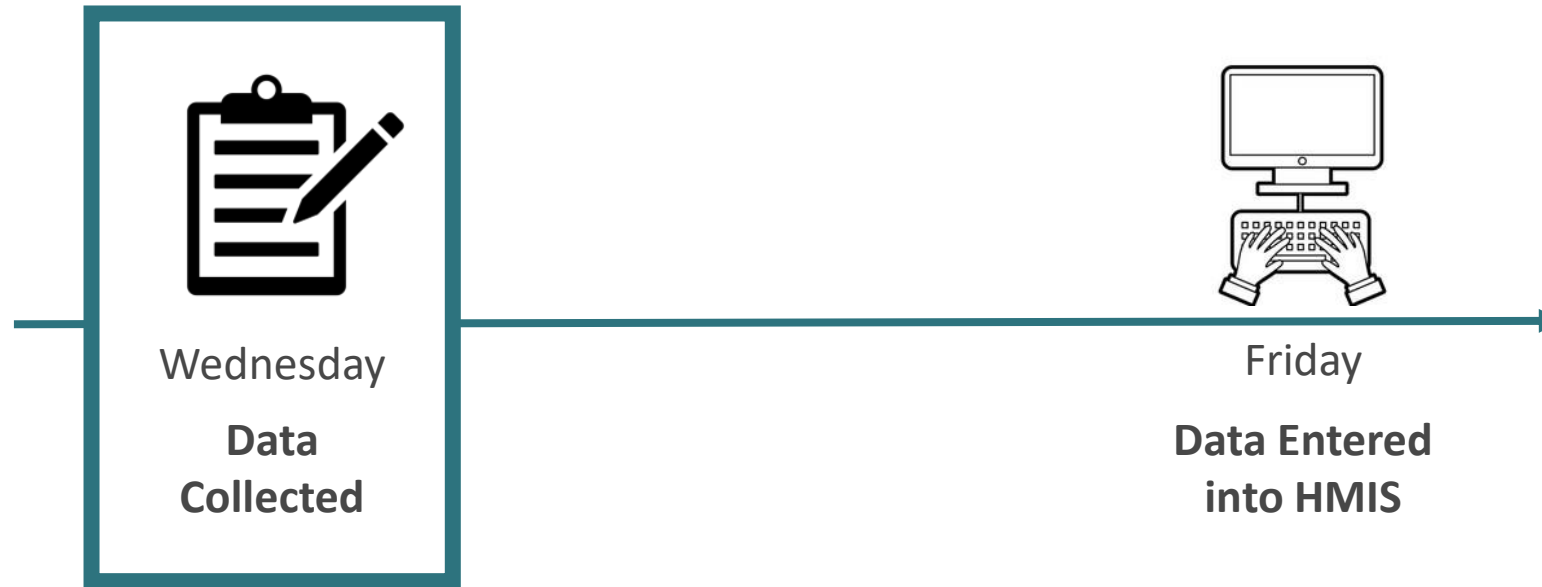
More Useful – when data is up-to-date, everyone is better off.

- 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.

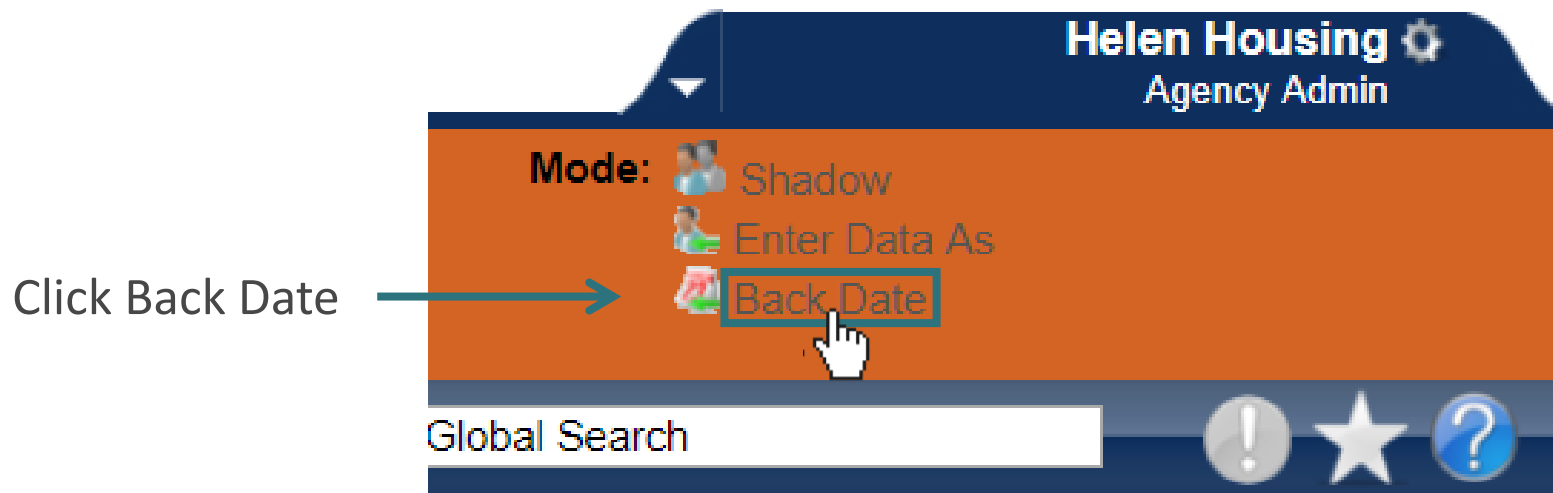


How to enter data with the right date?

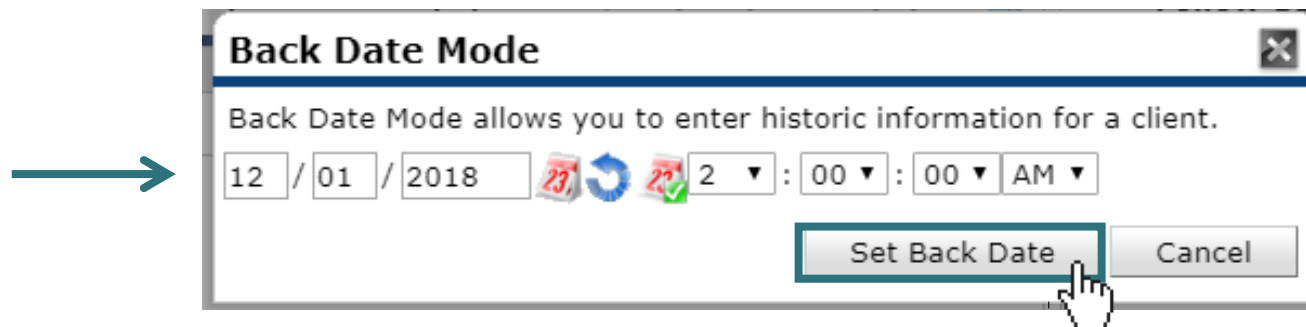
Back Date mode allows HMIS users to select the correct date



How to enter data with the right date?



Enter date and
Click Set Back 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 it 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 it 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



Data Elements to Remember



NCCEH

Don't forget NC County of Service!



What

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



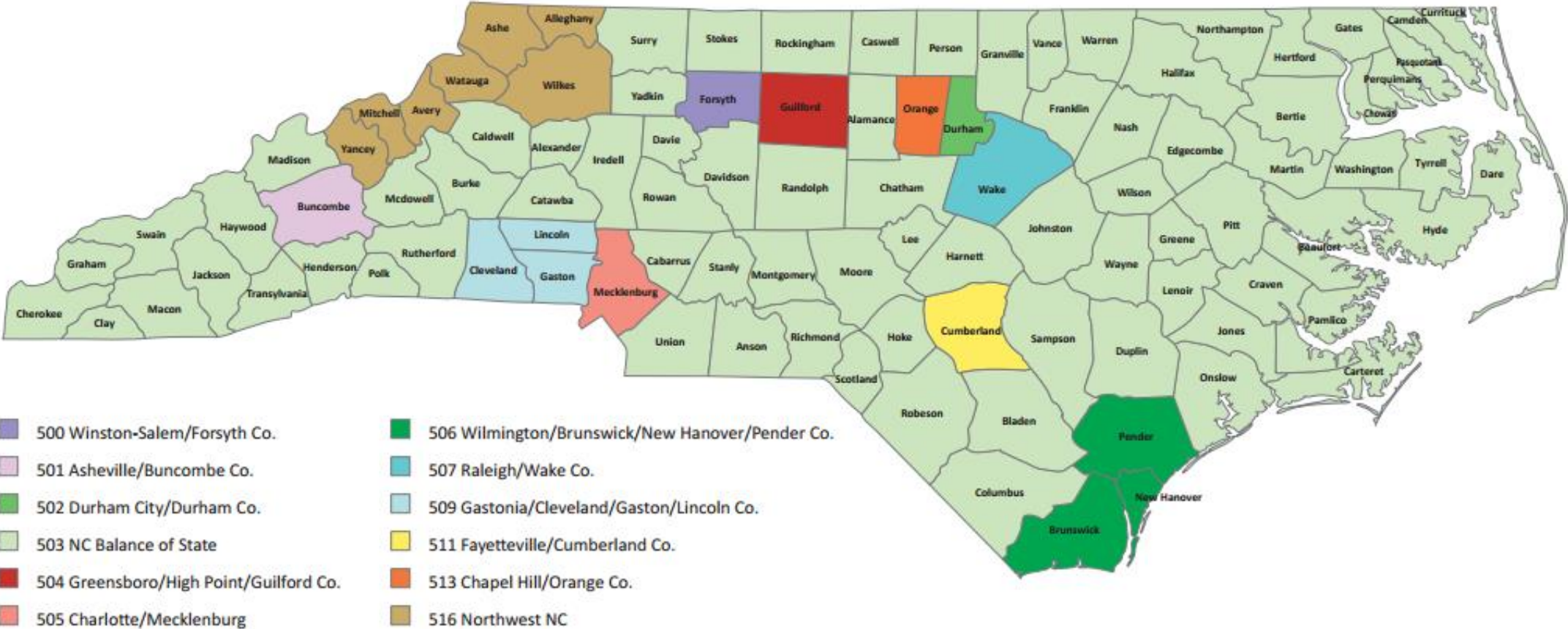
Collection Notes

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

| | | | | | | | | |
|---|--|-------------------|---------------------------------|----|-------|----------|------|------|
| | | 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 | | Rowan | | | G | | | |

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)

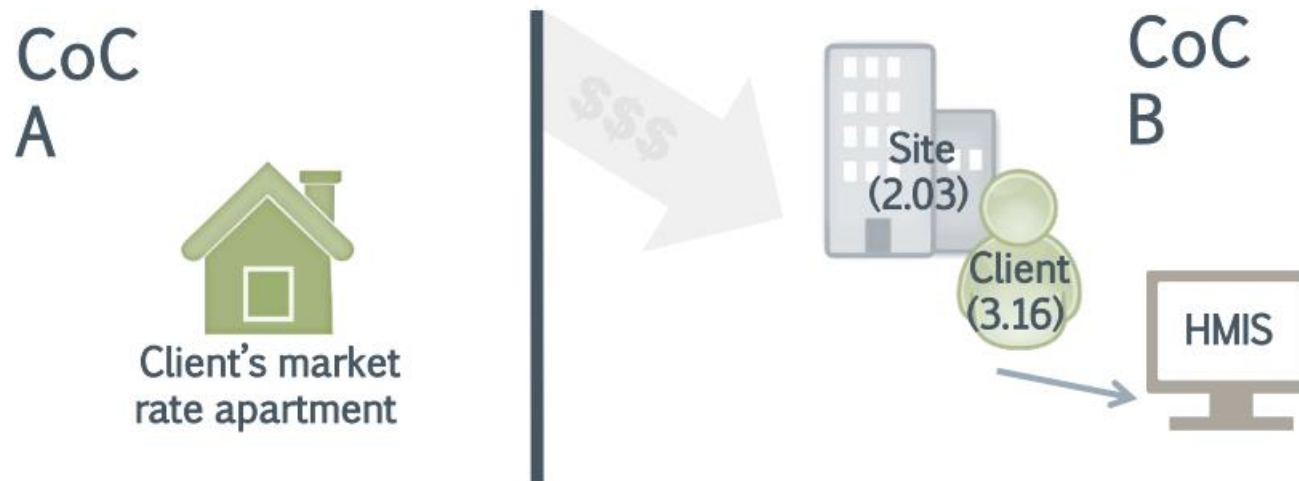


HMIS Data Standards 2020 - Updates

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

| | | | | |
|--|--|---------------------------------------|--------------------------------------|-------------------|
| On the night before this assessment, what was the clients CITY of residence? | <input type="text" value="Salisbury"/> | <input type="button" value="Lookup"/> | <input type="button" value="Clear"/> | G |
| Zip Code (of Last Permanent Address, if known) | <input type="text"/> | | | G |

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

| | | |
|-----------------|---|-------------------|
| Client Location | <input type="text" value="NC-503 NC Balance of State CoC"/> | G |
|-----------------|---|-------------------|

Homeless History

| | |
|---|---|
| Prior Living Situation (Immediately Prior to Entry) | <input type="text" value="Place not meant for habitation (HUD)"/> |
|---|---|



Client Location

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 | 23, 23, G |
| Income & Sources | | |
| Income from Any Source | Yes (HUD) | G |



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 [nccceh.org/hmis/administrative](https://www.nccceh.org/hmis/administrative).

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) Star, Skip




Household Members


i To update Household members for this Exit Data, click the box beside each name.

(2) Child w/single parent

(15) Star, Skip

Edit Exit Data - (15) Star, Skip

| | |
|----------------------|---|
| Exit Date * | 09 / 16 / 2019    9 ▾ : 55 ▾ : 24 ▾ AM ▾ |
| Reason for Leaving | <div style="border: 1px solid #ccc; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px;">-Select-</div><div style="background-color: #e0e0e0; padding: 2px;">-Select-</div><div style="background-color: #007bff; color: white; padding: 2px;">Completed program</div><div style="padding: 2px;">Criminal activity / violence</div><div style="padding: 2px;">Death</div><div style="padding: 2px;">Disagreement with rules/persons</div><div style="padding: 2px;">Left for housing opp. before completing program</div><div style="padding: 2px;">Needs could not be met</div><div style="padding: 2px;">Does not or no longer qualifies for program</div><div style="padding: 2px;">Non-compliance with program</div><div style="padding: 2px;">Non-payment of rent</div><div style="padding: 2px;">Other</div><div style="padding: 2px;">Reached maximum time allowed</div><div style="padding: 2px;">Unknown/Disappeared</div></div> |
| If "Other", Specify | <input type="text"/> |
| Destination * | <div style="border: 1px solid #ccc; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px;">-Select-</div></div> |
| If "Other", Specify | <input type="text"/> |
| Notes | <div style="border: 1px solid #ccc; padding: 2px; min-height: 100px;"><input type="text"/></div> |

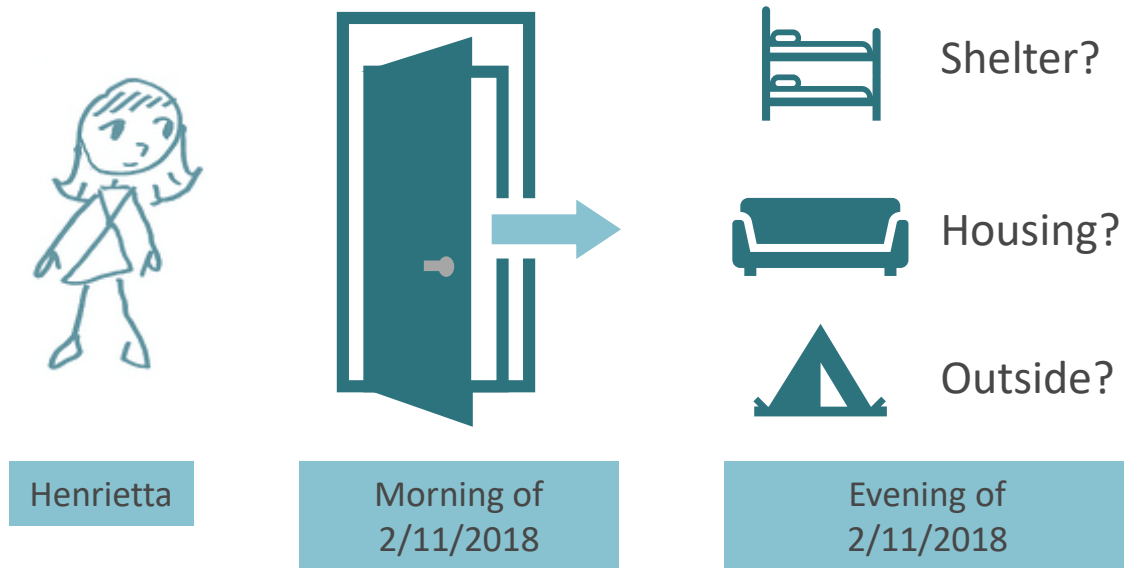


Exit Destination

What

Identify where a client will stay immediately exiting a project

If Henrietta exits, where will she sleep that night?

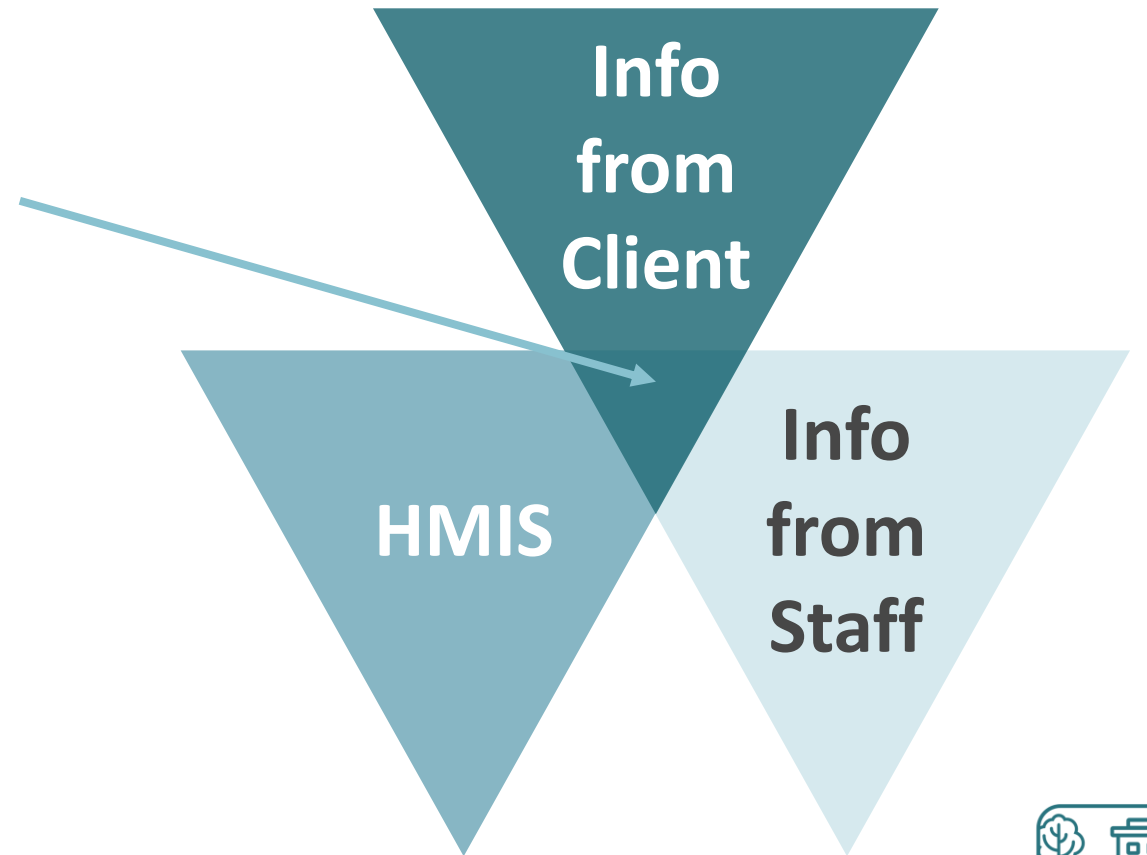


Exit Destination

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.



Exit Destination



Who

All clients



Data Collection Stage

At project exit



Special Reminder

Other will be considered incomplete

Keep a copy of our [Exit Destination Guide](#) available to consult

Missing data is always better than inaccurate data!



Exit Destination

On the paper assessment

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



Exit Destination

On the paper assessment

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



Exit Destination

Edit Exit Data - (15) Star, Skip



Household Members

To update Household members for this Exit Data, click the box beside each name.

(2) Child w/single parent

(15) Star, Skip

Edit Exit Data - (15) Star, 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 | Deceased (HUD) |

- 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)
- Psychiatric hospital or other psychiatric facility (HUD)
- Rental by client, no ongoing housing subsidy (HUD)
- Rental by client, with RRH or equivalent subsidy (HUD)
- Rental by client, with VASH subsidy (HUD)

Spotlight on HMIS Guides

Go to [ncceh.org/hmis/trainings](https://www.ncceh.org/hmis/trainings) for Additional Resources



NCCEH



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 |
| TBA | Longitudinal System Analysis and System Performance Measures Reports |


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) Doe, Jane 


 (90) Doe, Jane
Release of Information: **Ends 08/05/2020**

-Switch to Another Household Member- ▾

Client Information | **Service Transactions** 

Summary | Client Profile | Households | ROI | Entry / Exit | **Case Managers** | Case Plans | Assessments

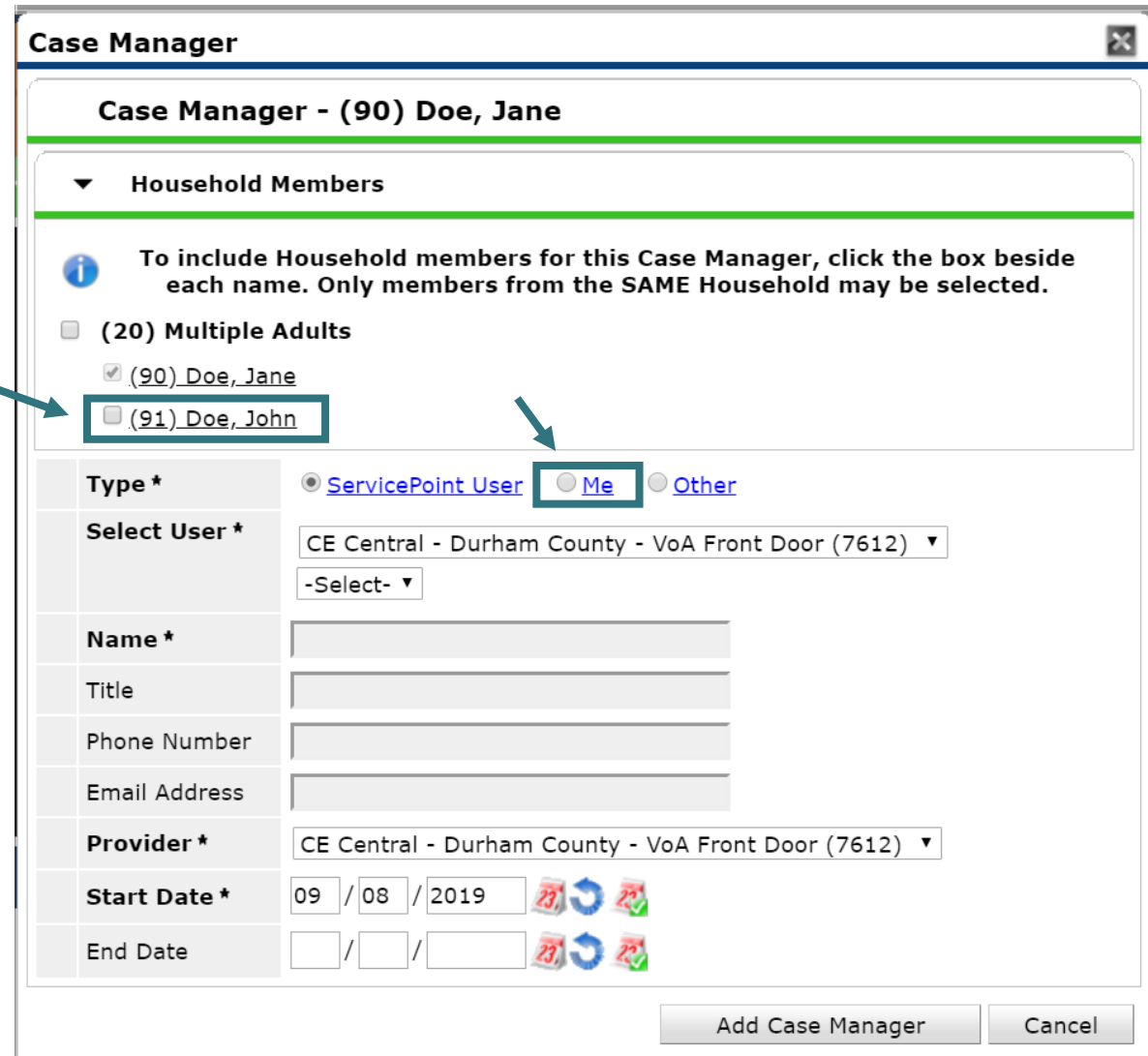
Case Managers

| Name | Provider | Phone Number | Start Date | End Date |
|--|----------|--------------|------------|----------|
| <input type="button" value="Add Case Manager"/>  No matches. | | | | |



Identify yourself as Case Manager




4. 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*




The screenshot shows a web form titled "Case Manager" with a sub-header "Case Manager - (90) Doe, Jane". Under the "Household Members" section, there is an information icon and text: "To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected." Below this, there are two entries: "(20) Multiple Adults" with a checked checkbox, and "(90) Doe, Jane" with a checked checkbox. The entry "(91) Doe, John" has an unchecked checkbox, which is highlighted with a blue box and a blue arrow pointing from the text in step 4. Below the household members, there are radio buttons for "Type": "ServicePoint User", "Me", and "Other". The "Me" radio button is selected and highlighted with a blue box and a blue arrow pointing from the text in step 5. Other fields include "Select User" (dropdown menu), "Name", "Title", "Phone Number", "Email Address", "Provider" (dropdown menu), "Start Date" (calendar), and "End Date" (calendar). At the bottom right, there are two buttons: "Add Case Manager" and "Cancel".

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 * | <input checked="" type="radio"/> ServicePoint User <input type="radio"/> Me <input type="radio"/> Other |
| Select User * | CE Central - Durham County (7610)  |
| Name * | -Select-  |
| Title | Chiquita Joseph (9716) Durham CE Administrator (9631) Jeremy Hiles (9710) Lavette Williams (9709) |
| Phone Number | 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) |

Front Door (7612) 

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 - (90) Doe, Jane 




 (90) Doe, Jane
Release of Information: **Ends 08/05/2020**

-Switch to Another Household Member- ▾

Client Information **Service Transactions**

Summary | Client Profile | Households | ROI | Entry / Exit | **Case Managers** | Case Plans | Assessments

Case Managers

| | Name | Provider | Phone Number | Start Date | End Date |
|---|-----------------|---|--------------|------------|----------|
|    | Chiquita Joseph | CE Central - Durham County - VoA Front Door | | 09/08/2019 | |

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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



NC COALITION to
end
HOMELESSNESS