Street Outreach Workflow

December 2021

NC COALITION to end HOMELESSNESS

Privacy 101

Privacy

Tools to bring with you

- 1 copy of the Privacy Sign
- 1 copy of the Privacy Notice
- 1 copy of Privacy Script (optional)
- 1 copy of Privacy Options 1 pager
- Multiple paper HMIS ROIs
- Multiple paper Unsheltered First Contacts or other Data Collection docs

*Find all of these docs on the Data Center's Admin page: ncceh.org/hmis/admin

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Privacy

Know key info for explanations

- Allowable uses
  - Coordination of services
  - For community partner funding/reimbursements
  - Admin purposes like audits
  - For de-identifying client info
- Standard info shared
  - Name, Age/Year of Birth, Gender, Veteran Status, Last 4 of SSN
- ROI Section 1, Section 2, and Section 3

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HMIS Privacy Options and one pager

Easy document to take with you

- Talks about automatic use and system security
- Lists sharing and visibility choices for HMIS

Sharing Options: In HMIS, there are options to share your information with other community partners.

- *ROI Section 1*: Share or not share your basic info (like Name) with other agencies that use HMIS@NCCEH
- *ROI Section 2*: Share or not share more detailed info with local agencies also providing housing services in HMIS
- *ROI Section 3*: Allow or not allow coordination outside of HMIS (like at confidential community meetings)

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HMIS Privacy Options and one pager

Easy document to take with you

- Talks about automatic use and system security
- Lists sharing and visibility choices for HMIS

Electronic Client File Options: Still concerned for your privacy? There are a few options for how we create your client file.

- Hide your basic info (like Name) from other staff at this agency and all others. This is an “Unnamed record”.
- De-identified your profile. Use code-name or pseudonym in HMIS to limit identifying information.
- No HMIS entry (might delay services). Requires tracking outside of HMIS.

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If consent is not given

You must lock-down visibility to the client's HMIS information

- Two reasons you may not have consent to share
  1. You may not have an opportunity at the 1st contact to ask for consent
  2. The privacy conversation has occurred, and the client declines to share info

Contact the Data Center for help!

- Create an HMIS Profile, then write us at hmis@ncceh.org, and specify if you need everything locked down or
  - Just searchable profile info (aka ROI Section 1) or
  - Just community sharing in HMIS (ROI Section 2)

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Data Collection Stages

Reminder

Remember this?

Project Start Date

Collection Notes

Project Type	When do I enter Project Start?
Street Outreach (SO)	First contact between client and outreach worker
Residential homeless (ES, TH)	First night the client sleeps in a bed
Permanent Housing (RHR, PSH)	The date when an eligible client accepts offer of available services
All Other (SSO, PV)	First services delivered to client

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Remember this?

Project Start Date: Street Outreach

6/1/2018	6/4/2018	6/5/2018	6/7/2018	6/15/2018
1st Contact	2nd Contact	3rd Contact	4th Contact & Date of Engagement	5th + Contact

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Remember this?

Project Start Date: Street Outreach

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Entering Street Outreach projects into HMIS

- **Step 1:** Find (or create) the client profile
- **Step 2:** Create a Project Start on the Entry/Exit tab to record the first Contact
- **Step 3:** Record additional contacts through Interim Updates (as they happen)
- **Step 4:** Record the Date of Engagement through an Interim Update once a client agrees to services
  - Exception: If a client has a Date of Engagement on Day 1, record the date on the Project Start/Entry Assessment

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First Contact

Collect Data and Work on Engagement

- Collect as much information as the client is comfortable giving (ideally minimum on first contact form) including:
  - Searchable info like Name, SSN, Date of Birth
  - Contact info
  - Info for referrals like Veteran Status, DV history
  - Current living situation
- If possible complete CE assessment, assess for basic needs and make appropriate referrals

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Collect Data and Work on Engagement

Project Start Assessment – First Outreach Contact

This form should be used for by outreach at first contact for every client. Additional data elements can be collected at later dates or interactions.

Identify yourself and explain the purpose of your questions.

Hello, my name is _____, and I am helping connect persons experiencing homelessness to resources in the community. Would you like information on shelters in your area or how to get connected to a system in your area for permanent housing?

If the person gives consent:

A. Has anyone asked you questions about experiencing homelessness already? If so, find out who.
B. Where are you sleeping tonight? If staying at a sheltered location, do not continue with unsheltered form/process but can engage for resource conversation etc. as appropriate.

ANSWER FOR ALL HOUSEHOLD MEMBERS

DATE OF DATA COLLECTION									
		/			/				
Month			Day			Year			

NAME - (nick-name/ street name/ description if name missing)	
First Name	
Middle Name	
Last Name	
Suffix (e.g., Jr, Sr, III)	

NAME DATA QUALITY
☐ Full name reported
☐ Partial, street name or code name
☐ Client doesn't know (CDK)
☐ Client refused (CR)
☐ Data Not Collected (DNC)

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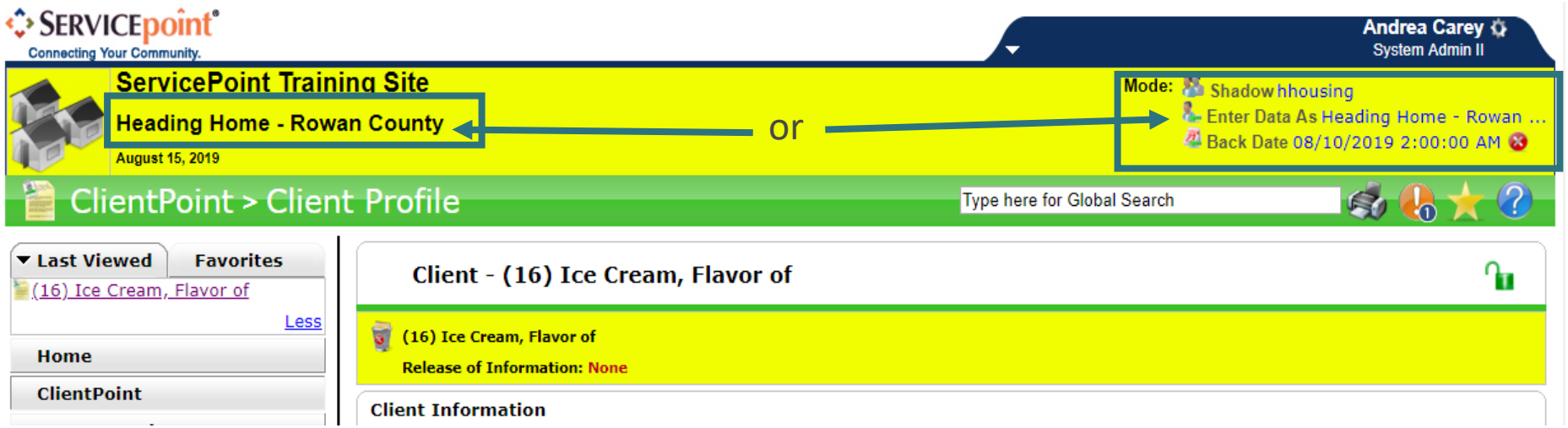
Remember to check EDA and Back Date mode!

Make sure you are in:

- Enter Data As mode for the Street Outreach project
- Back Date is set to your first contact with client



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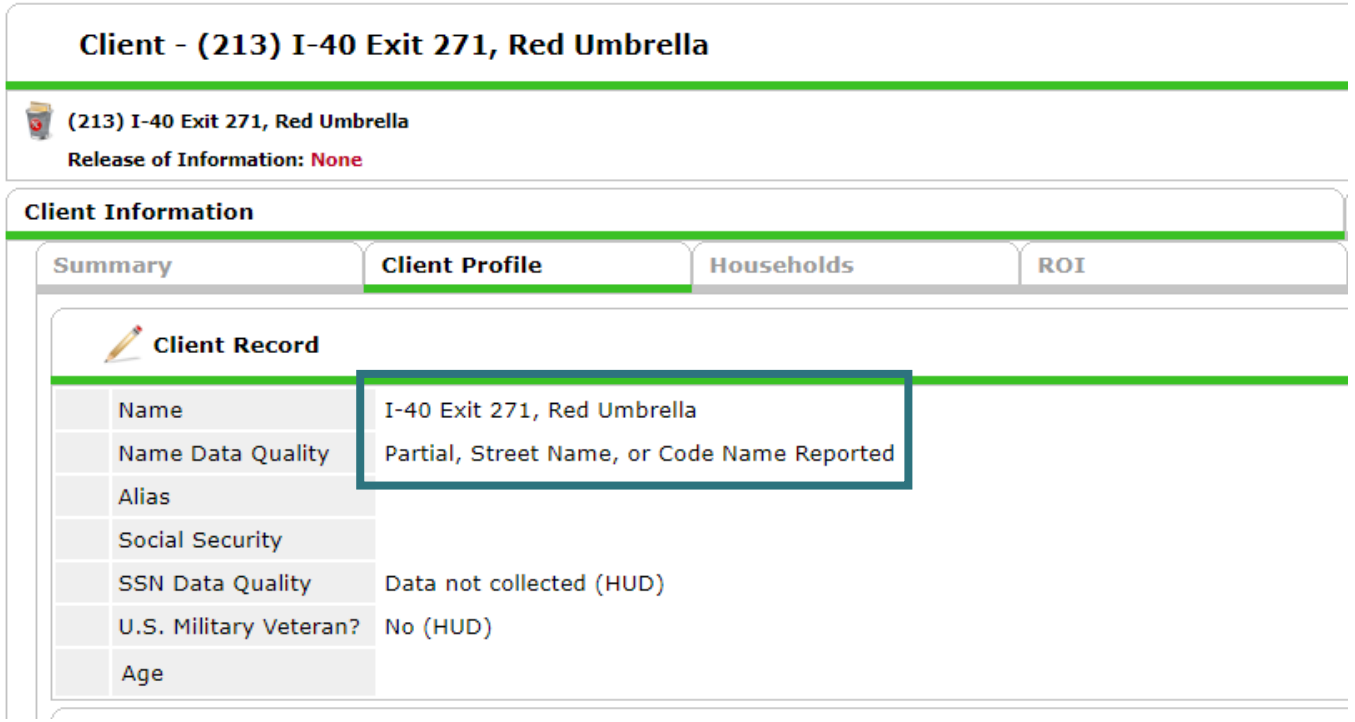
Not all information is required at first contact

Record what information you have after 1st contact

- If name is unavailable:
  - Use a description as the fist name and location as the last name
  - Like “Red Umbrella” “I-40 Exit 271”
  - Remember to use Name Quality Drop-down
- Update name on or before Date of Engagement



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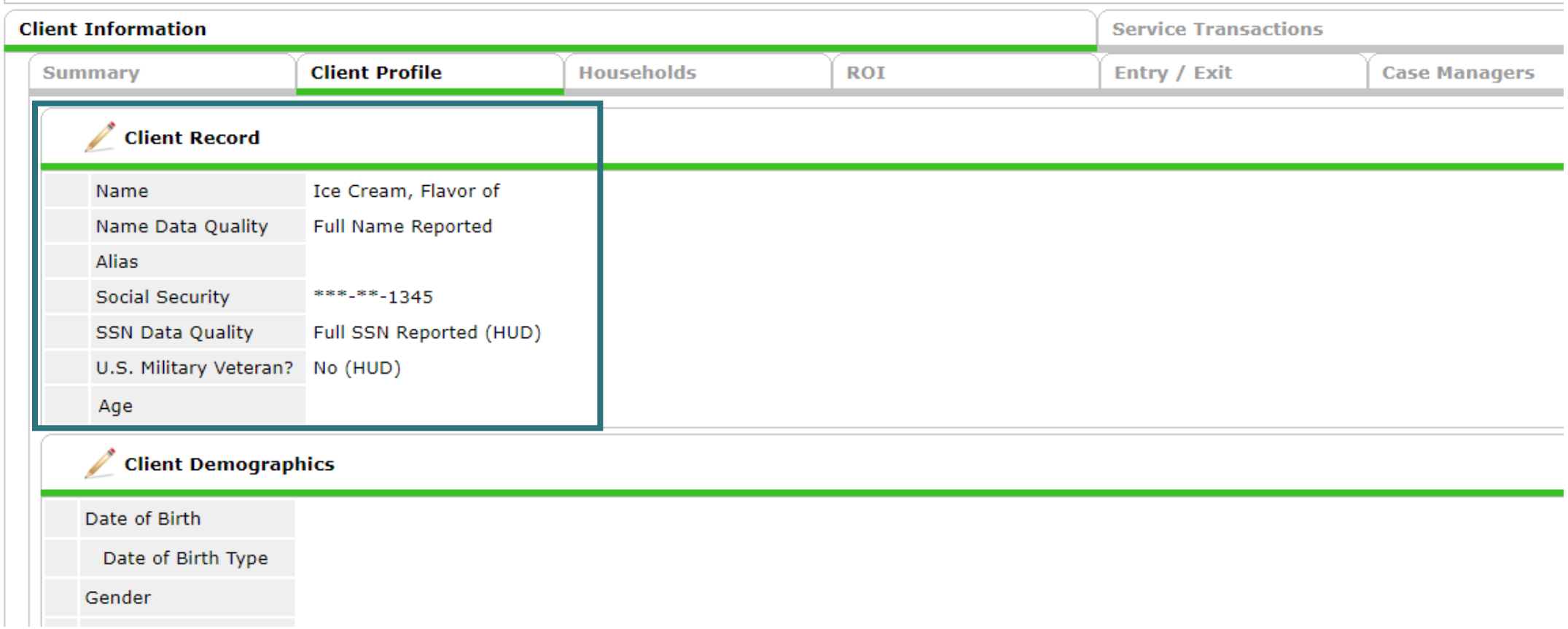
Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Record

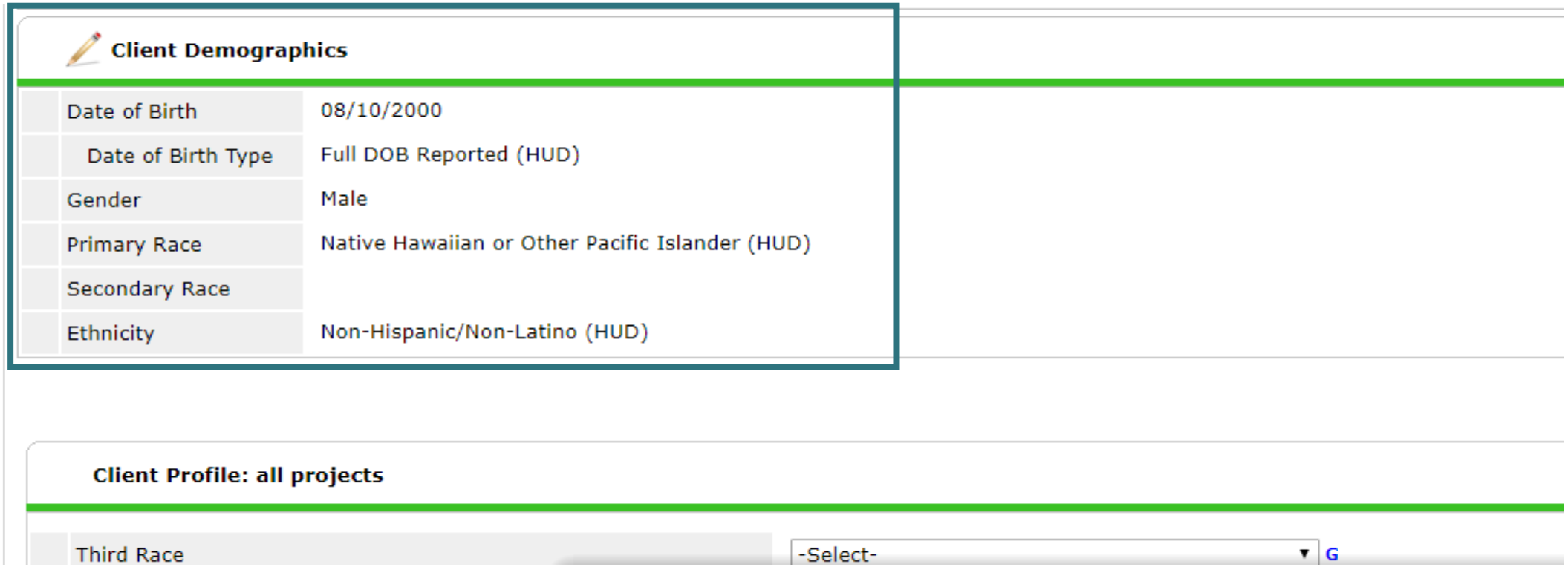


NCCEH

Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Demographics

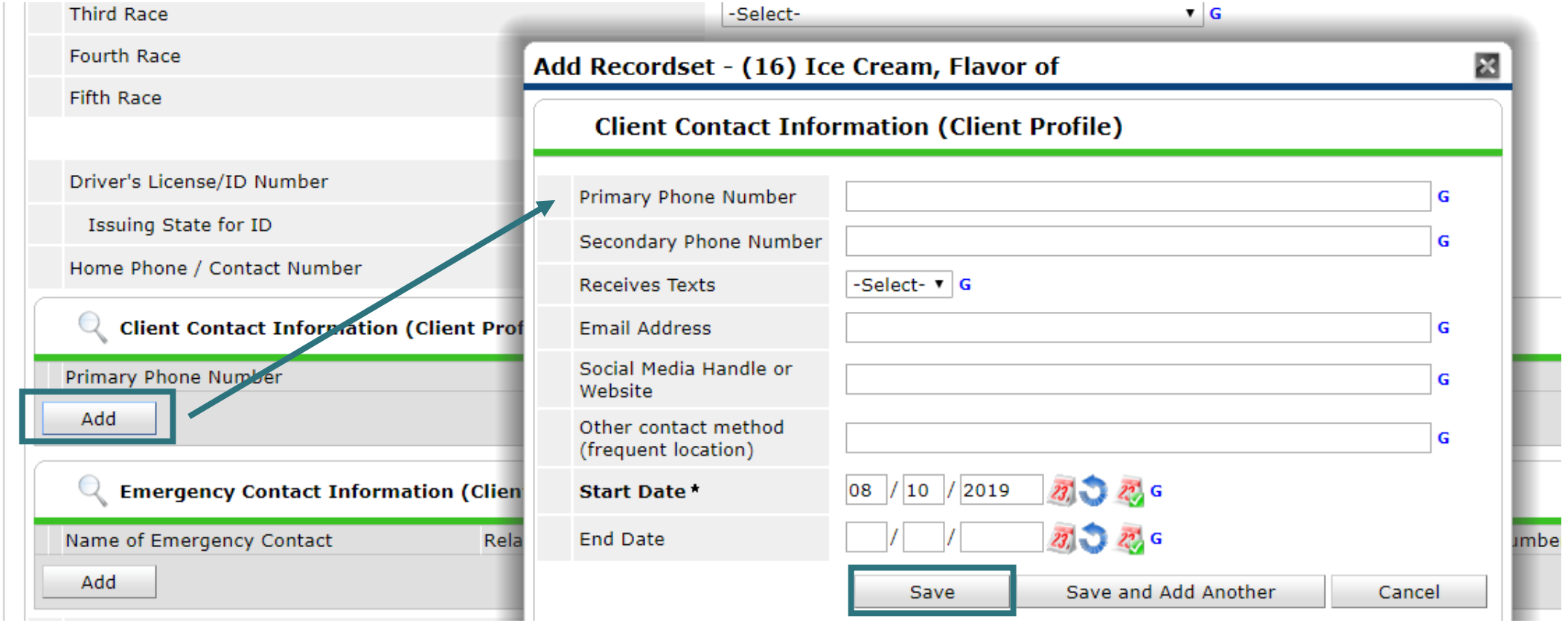


NCCEH

Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Contact information

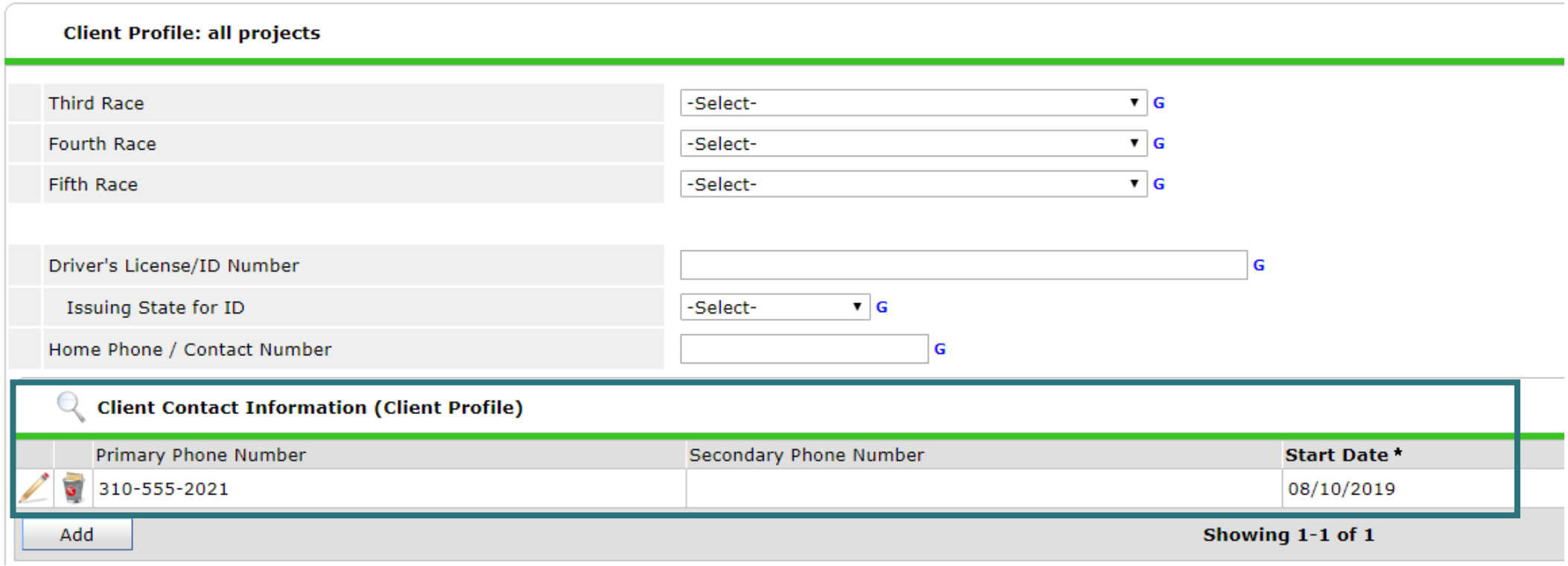


NCCEH

Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Contact information



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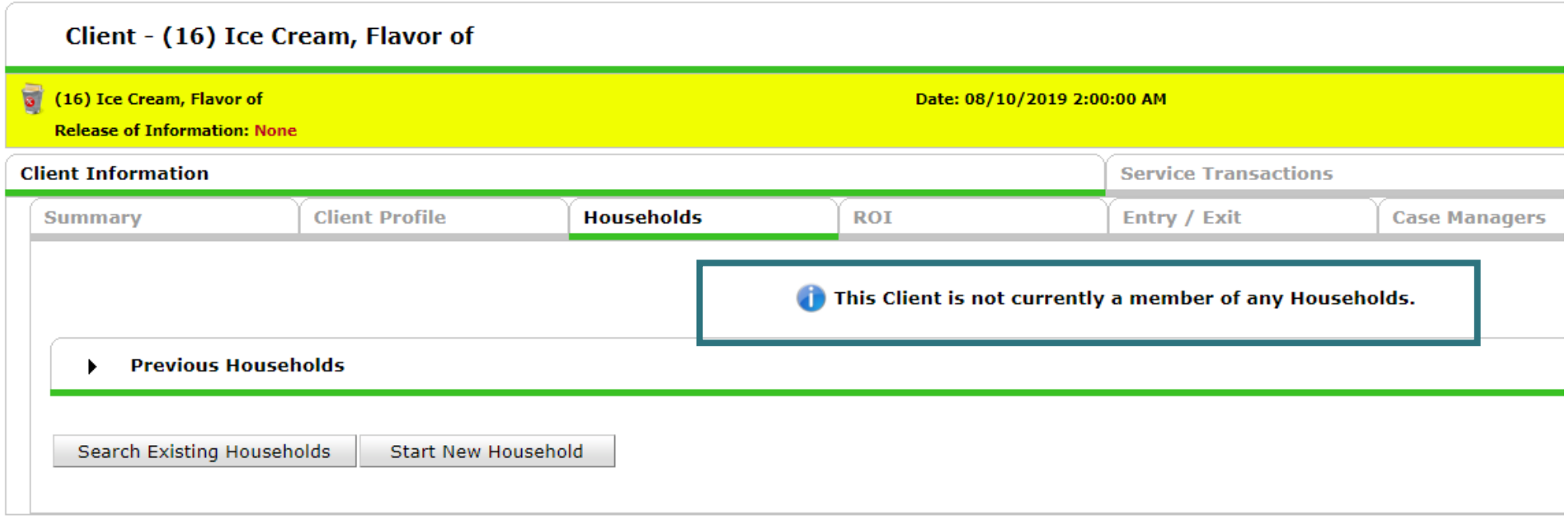
Is the client part of a household?

Record what information you have after 1st contact

- If the client is a single individual, skip the Household tab
- If the client is in a household, add other members on Household tab



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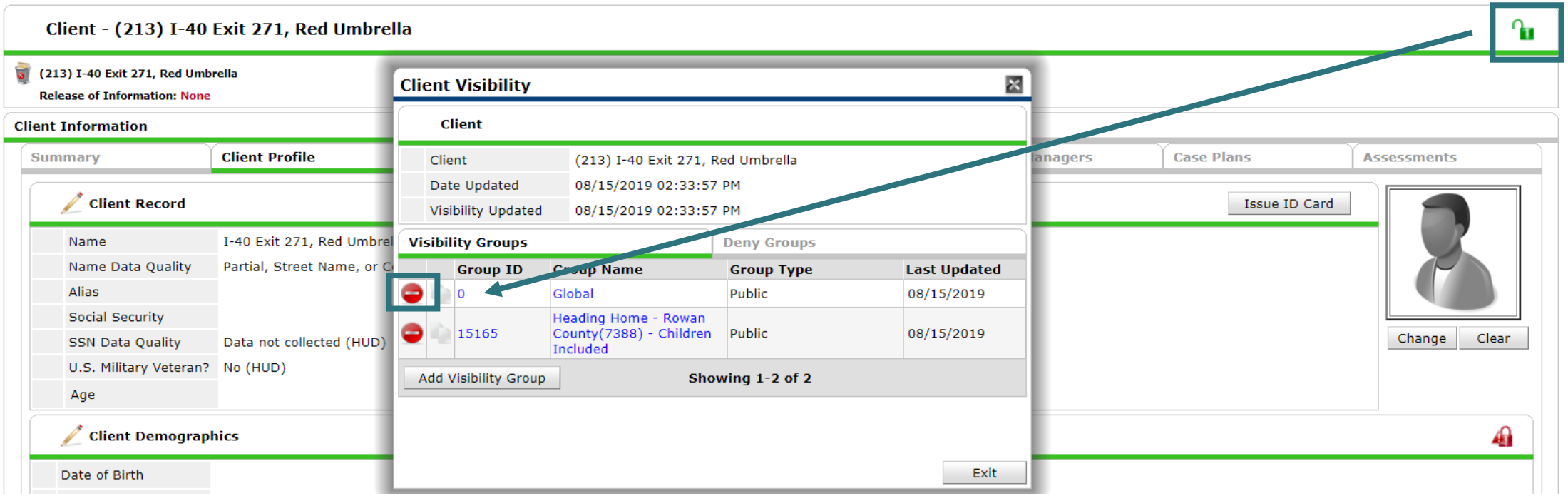
Has the client given consent?

Record what information you have after 1st contact

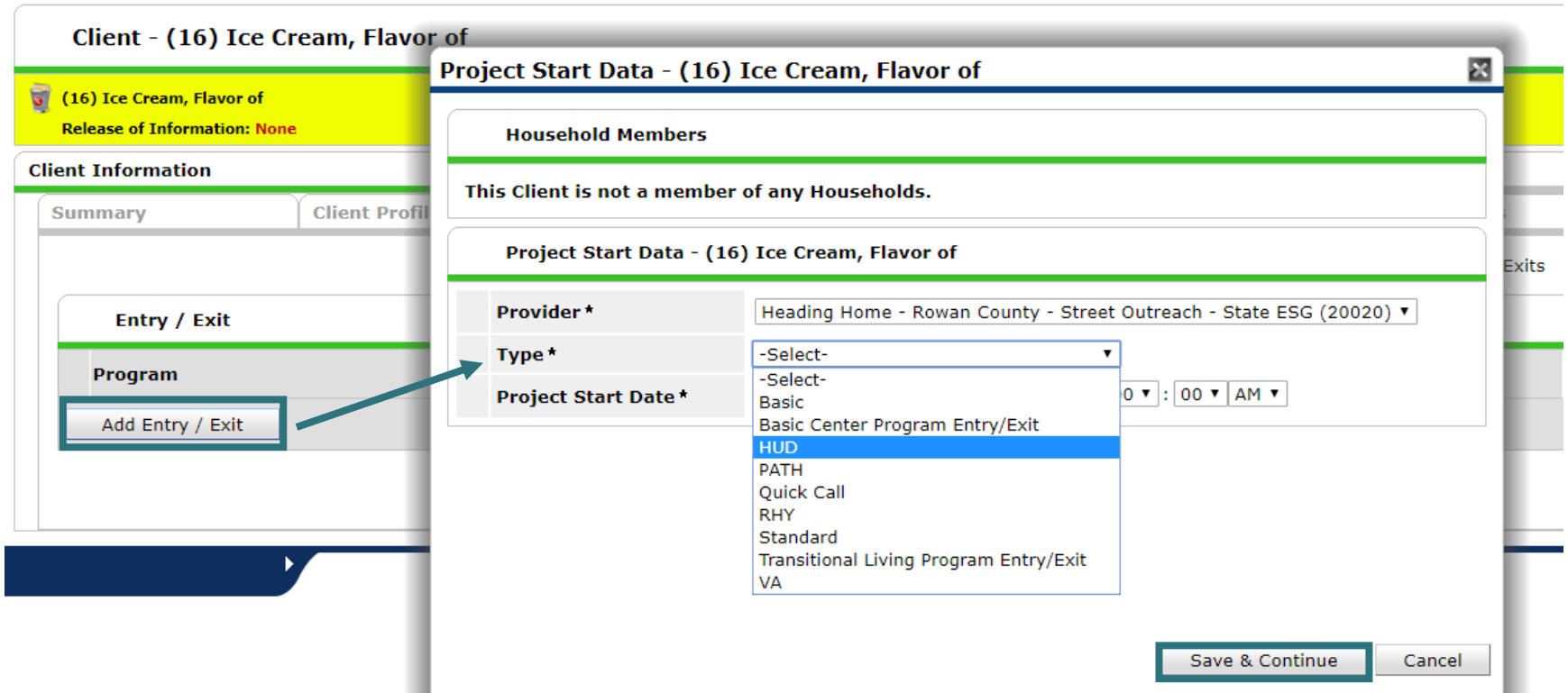
- ROI must be signed on or before Date of Engagement
- If no privacy and consent conversation has occurred, skip the ROI tab and lock down client visibility



Project Start begins with first contact

Record what information you have after 1st contact

- Add the Project Start
- Entry type is HUD, unless funding says otherwise



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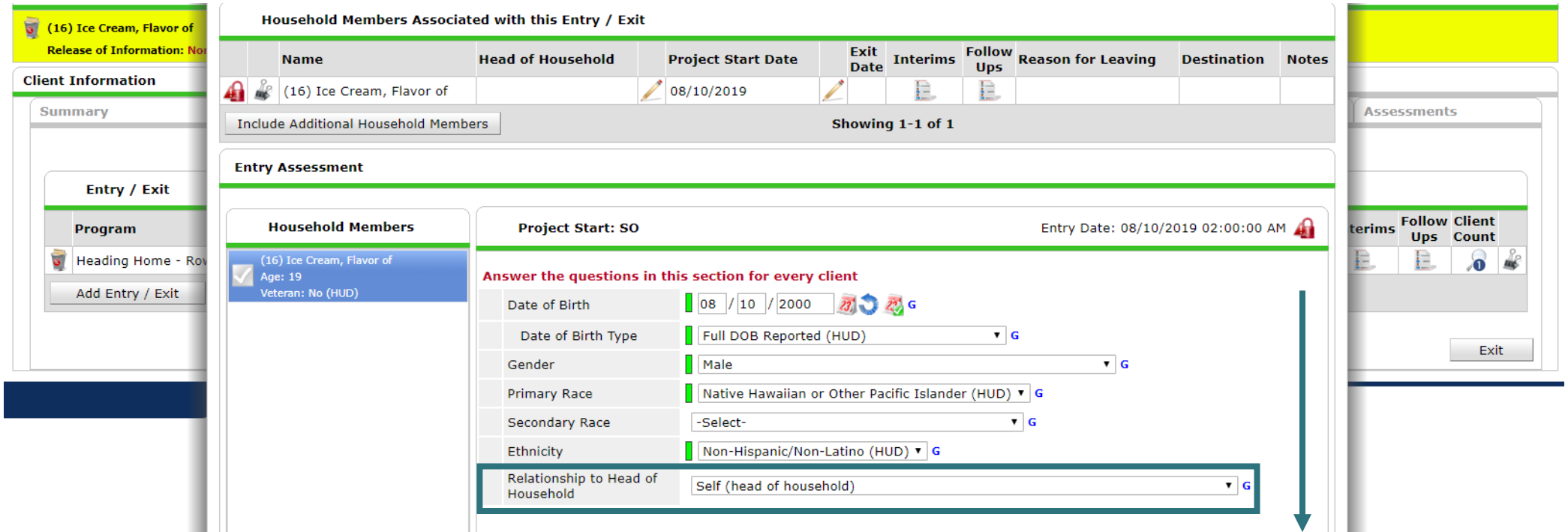
Project Start begins with first contact

Record what information you have after 1st contact

- At least Relationship to Head of Household, NC County of Service, Client Location, and Current Living Situation
- Scroll through assessment to check for info gathered during first contact

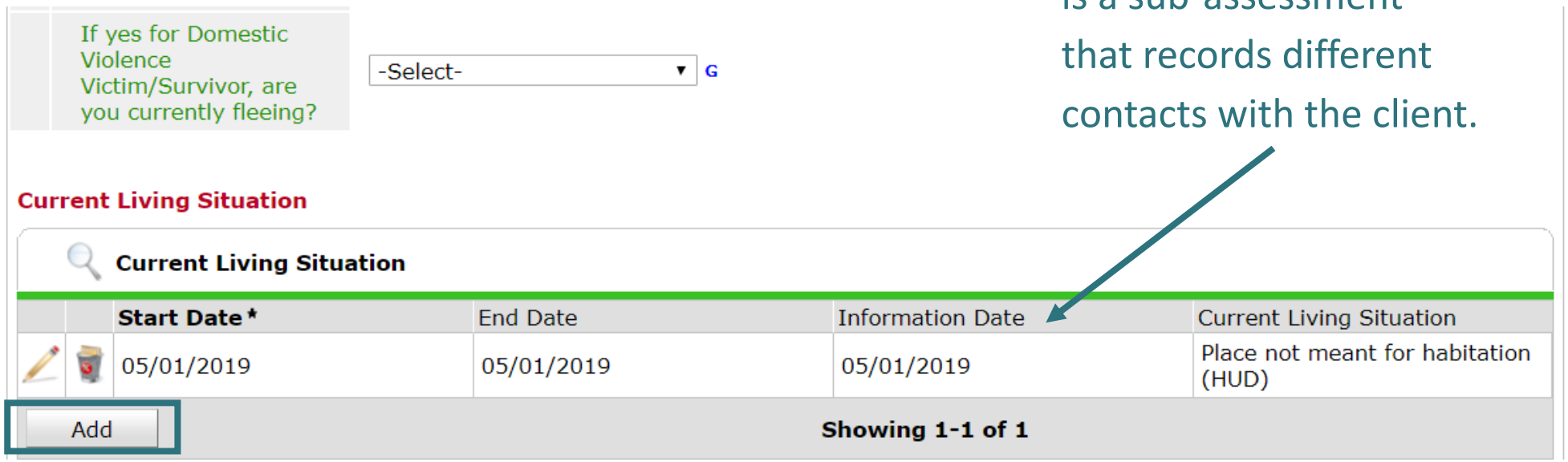


NCCEH

Project Start begins with first contact

Record what information you have after 1st contact

- Scroll to Current Living Situation section
- Add a record for client's first contact



Current Living Situation is a sub-assessment that records different contacts with the client.

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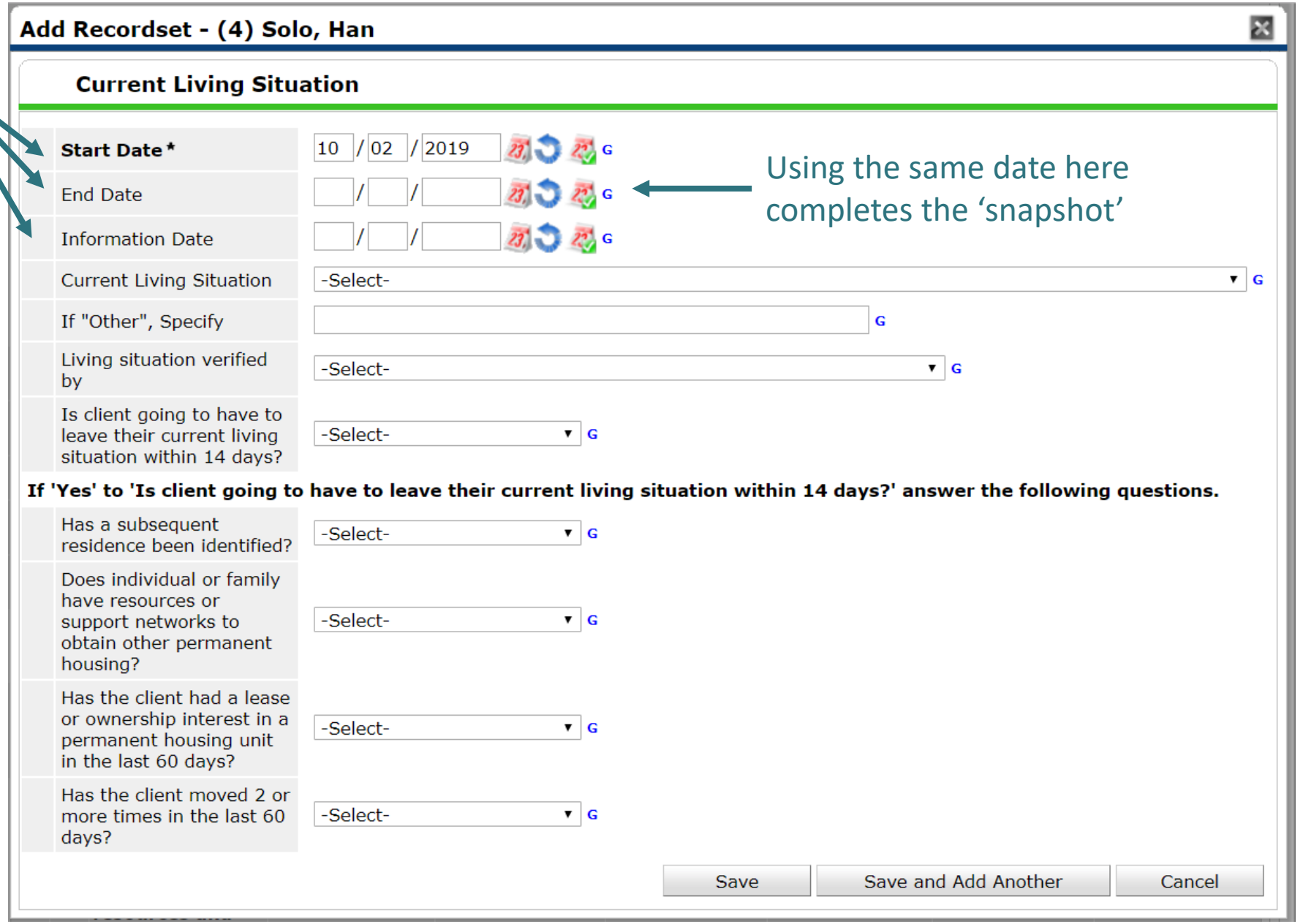
All Dates are the date of your data collection



Using the same date here completes the 'snapshot'

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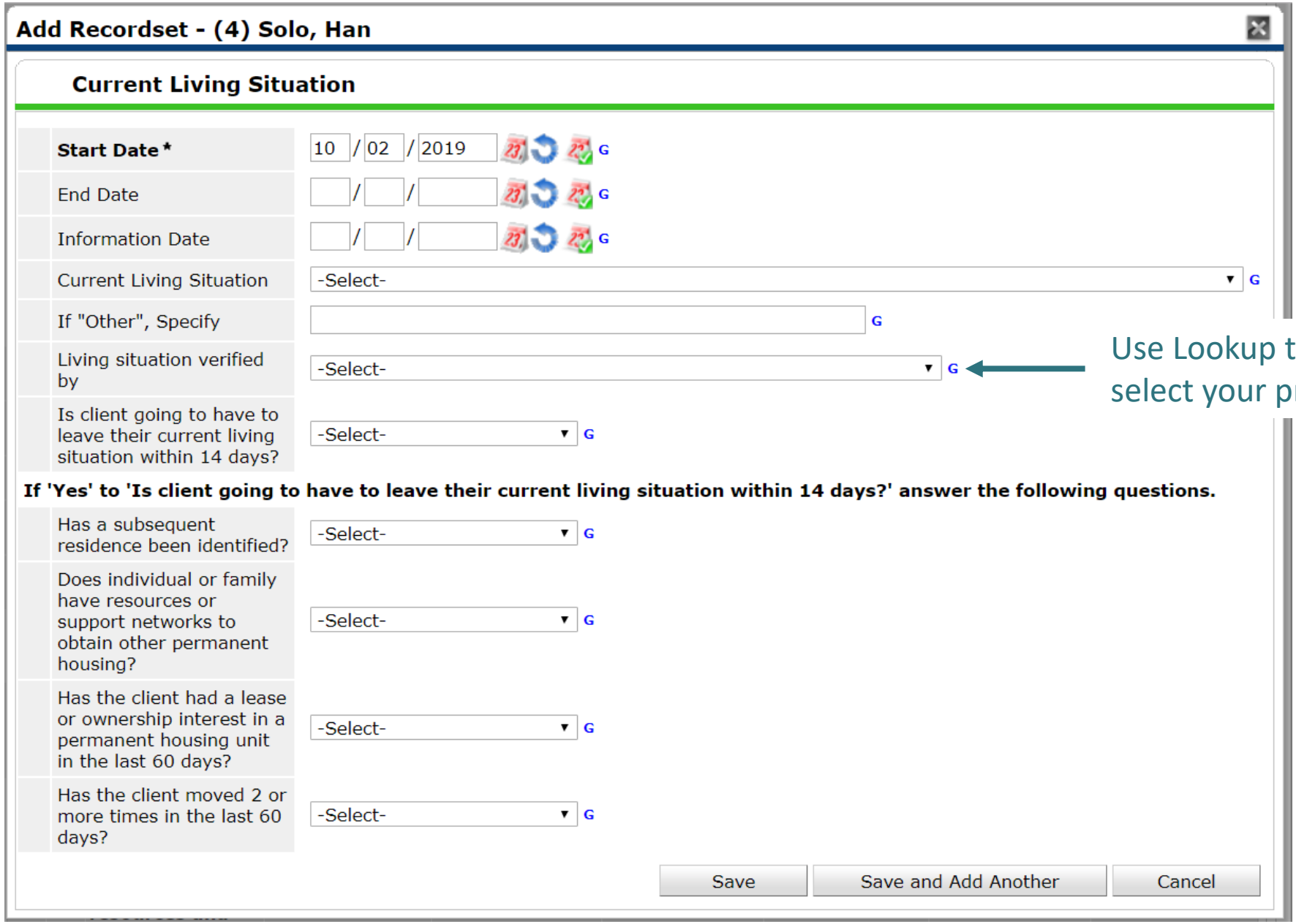
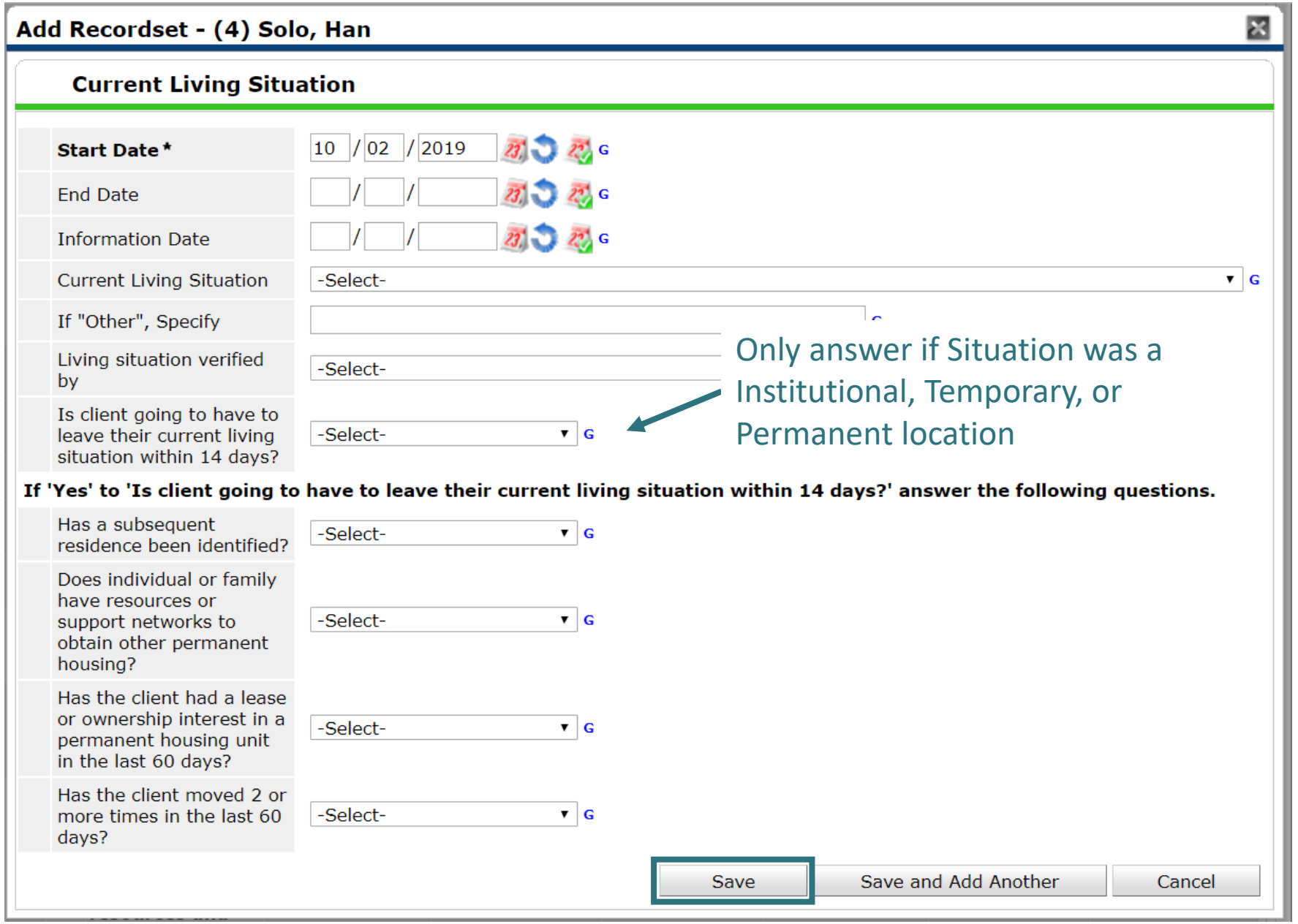
Just like Prior Living Situation!



Use Lookup to select your project

NCCEH



This section helps determine if clients are Category 2 Homeless

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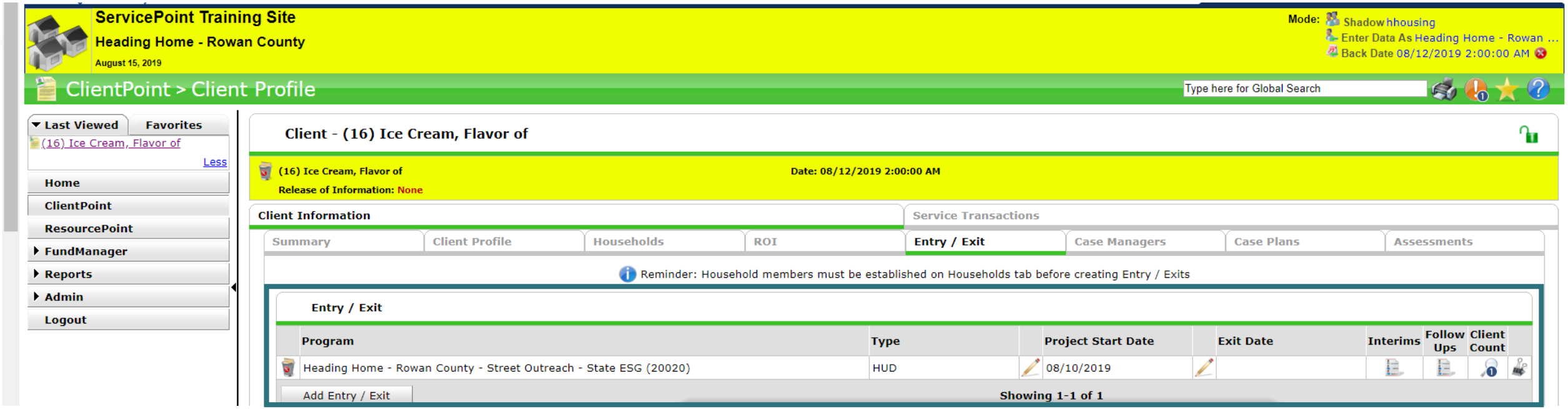
The client has a Project Start after first contact



NCCEH

Second Contact and Beyond

Collect Additional Data and More Engagement

- Collect as much additional information as the client is comfortable giving including Current Living Situation (use contact or normal forms)
  - Street outreach worker meets with client about well-being or needs, about a housing plan in the office, or for a referral to another service
  - HUD requires Current Living Situation to be entered at least every 3 months, but best practice is at least once a month
- If not already done complete CE assessment, assess for basic needs and make appropriate referrals

NCCEH

Collect Additional Data and More Engagement

Outreach Contact Supplemental

This form can be used for outreach to collect information at contacts.

CLIENT (name or other identifier)

TYPE OF CURRENT LIVING SITUATION - Where was the client living during this contact with the client?
☐ Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)
☐ Emergency shelter, including hotel or motel paid for *with* emergency shelter voucher, or RHY-funded Host Home shelter
☐ Institution (add institution details below)
☐ Temporarily Housed (add temporary location details below)
☐ Permanently Housed (add permanent location details below)
☐ Other (specify):
Living Situation confirmed by: Name the confirming agency and project
CURRENT LIVING SITUATION - Location details (including type of institution and/or specifics on where and who might be helping fund ie. voucher etc)

CONTACT NOTES (any changes, services provided, referrals made, follow ups etc):

Example activities where CLS should be collected:

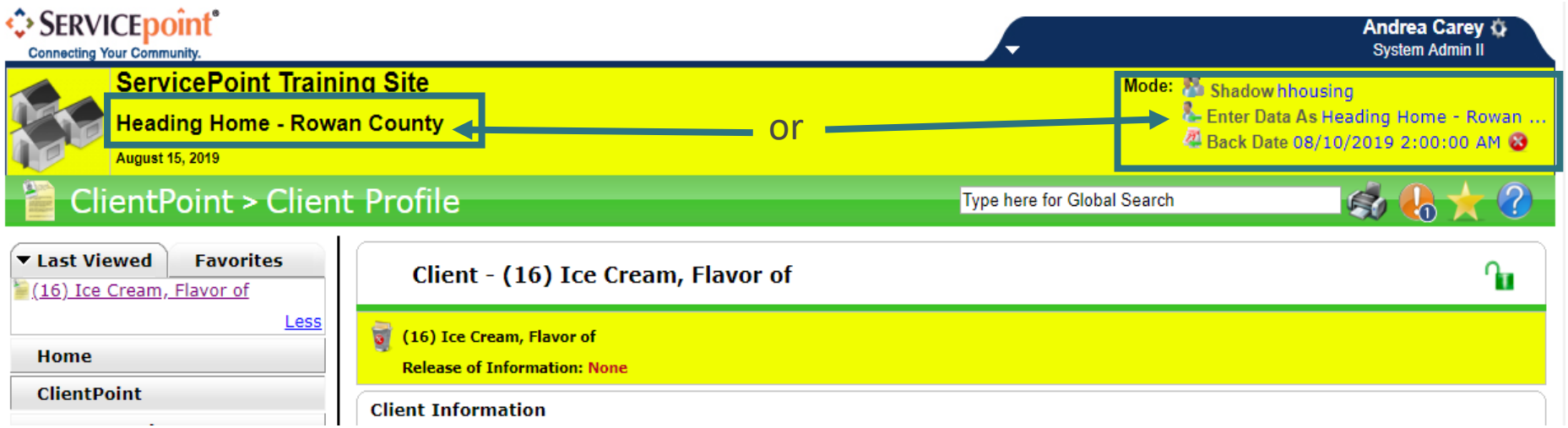
Street outreach worker meets with client about well-being or needs, about a housing plan in the office, or for a referral to another service

NCCEH

Remember to check EDA and Back Date mode!

Make sure you are in:

- Enter Data As mode for the Street Outreach project
- Back Date is set to your contact with client

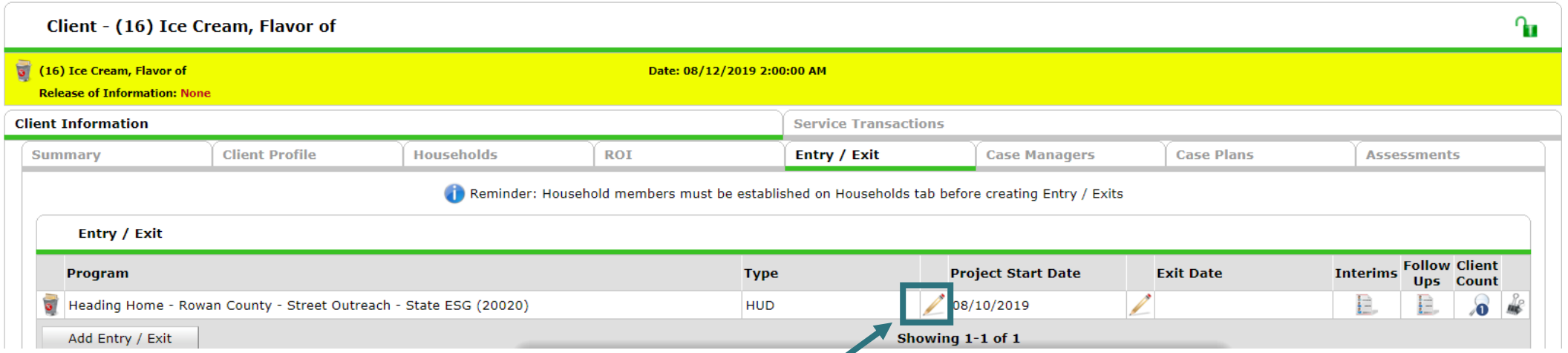


NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Add Household or ROI if applicable
- Edit the Project Start for Homeless History, Income, DV History, etc.



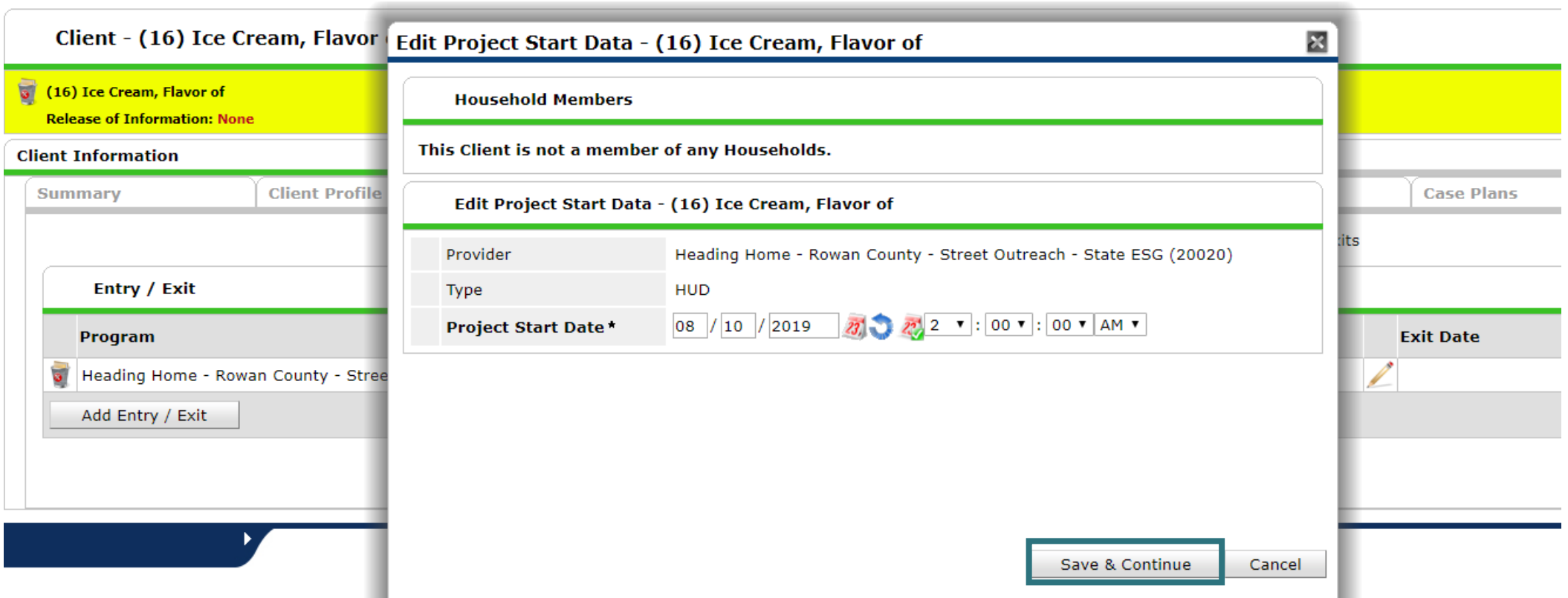
Street Outreach is the ***only*** project type where info is added after the Project Start Date

NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Edit the Project Start for Homeless History, Income, DV History, etc.
- Careful! Don't change the Project Start Date

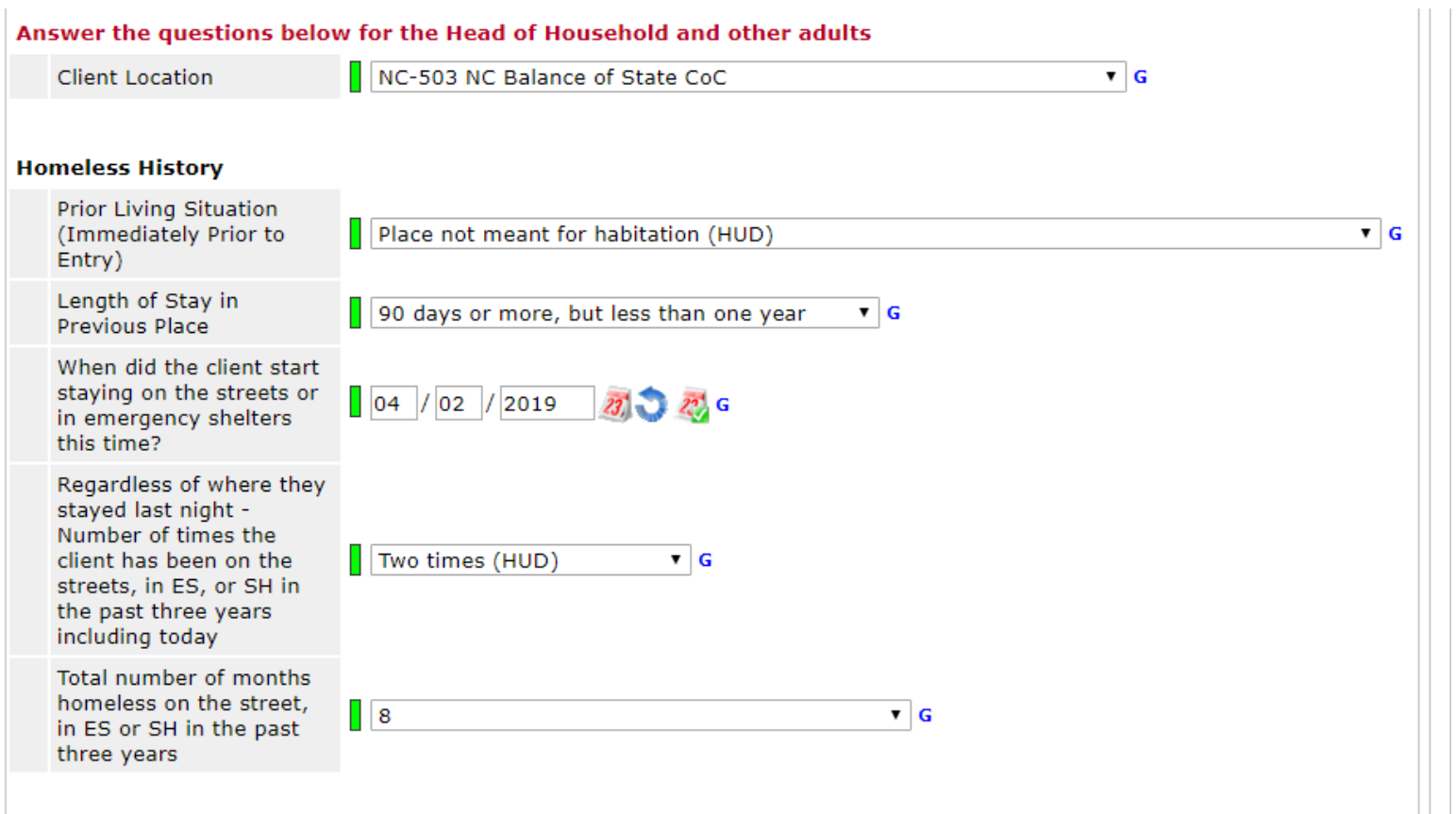


NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Edit the Project Start for Homeless History, Income, DV History, etc.

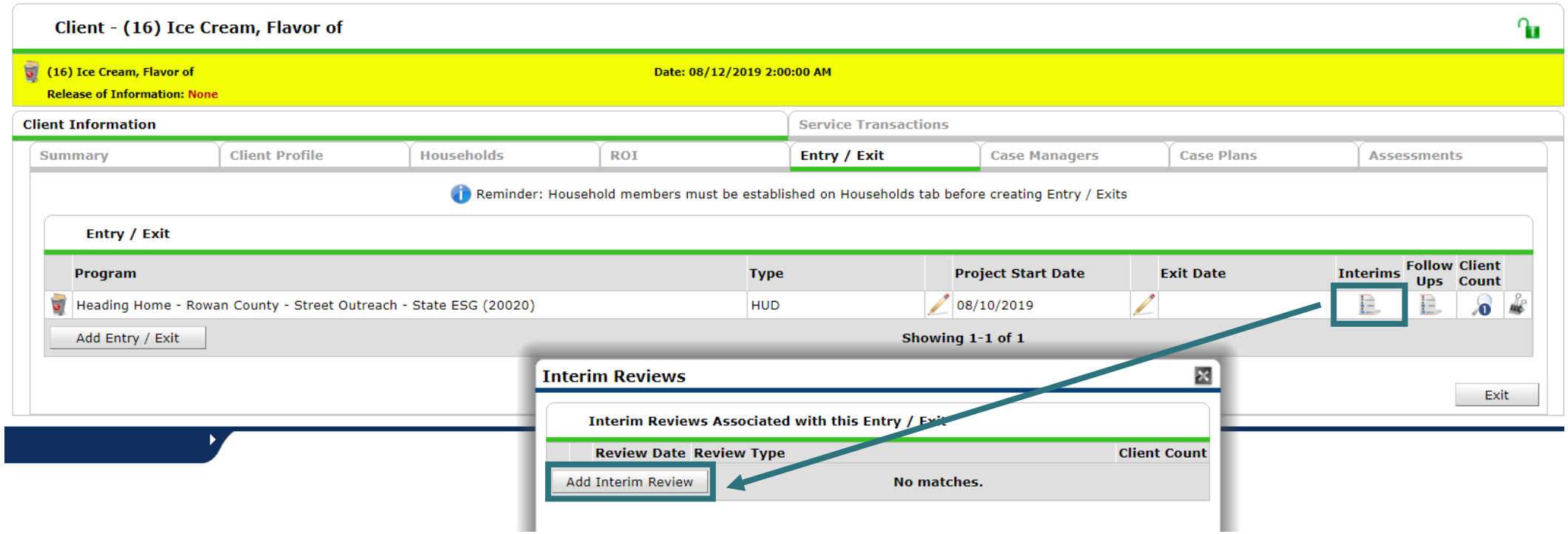


NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Add an Interim to record the Outreach contact

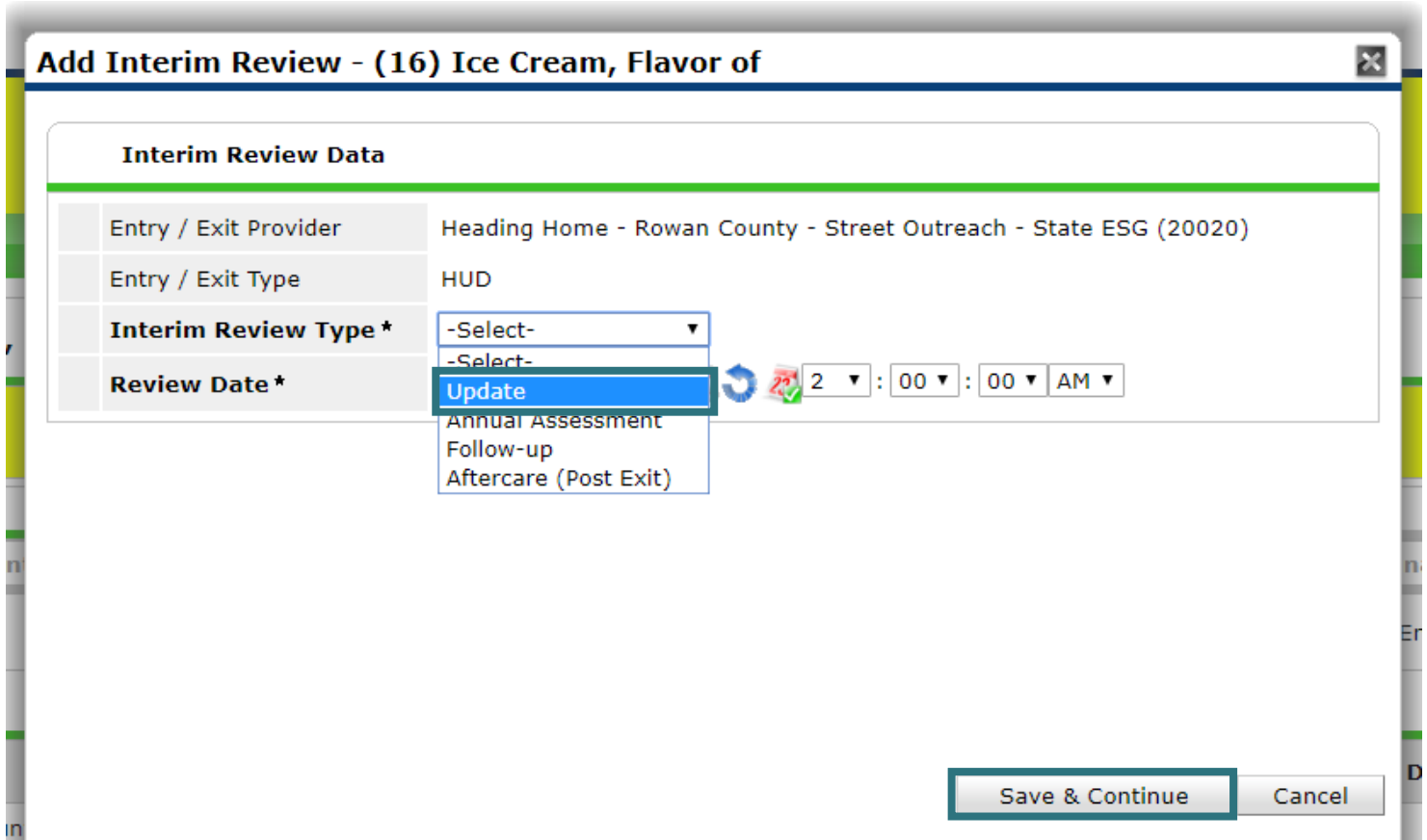


NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Add an Interim **Update**

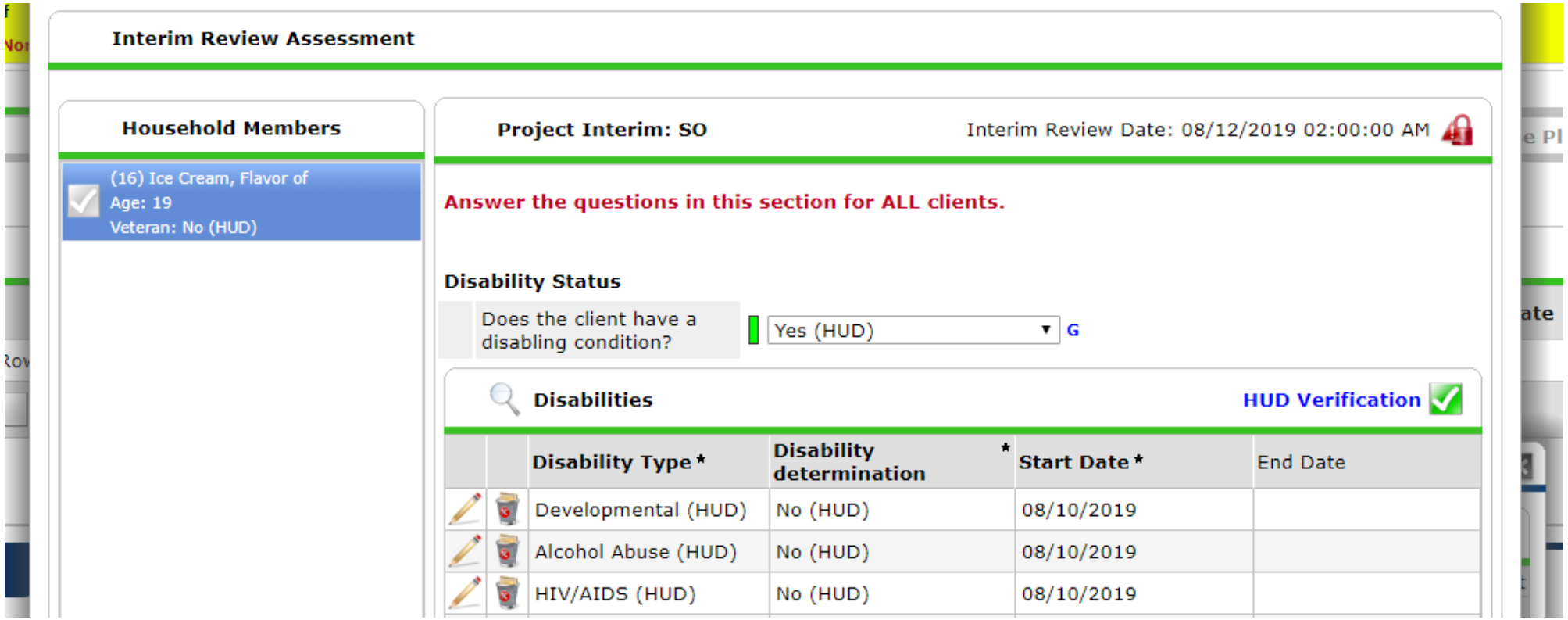


NCCEH

Add more information at the next contact

Record what information you have after the next contact

- Scroll through assessment to check for information gathered during first contact



NCCEH

Add more information at the next contact

Record what information you have after the Current Living Situation

- Add the next record to identify where the client is staying

Repeat steps to add each new Current Living Situation!

Current Living Situation

Current Living Situation

		Start Date*	End Date	Information Date	Current Living Situation
		07/08/2021	07/08/2021	07/08/2021	Place not meant for habitation (HUD)
		06/08/2021	06/08/2021	06/08/2021	Place not meant for habitation (HUD)
		05/08/2021	05/08/2021	05/08/2021	Place not meant for habitation (HUD)

Add **Showing 1-3 of 3**

Date of Engagement / /

NCCEH

Add more information at the next contact

Don’t forget to record more Client Contact Info on the Profile tab!

- The more contacts you have, the easier it will be to find them with resources
- Could be direct contacts, third parties, or locations

Client Contact Information (NCCEH)

		Primary Phone Number	Secondary Phone Number	Ok to receive texts?	Other contact method (frequent location)	**Start Date***
		919-422-4545			Community Meeting organizers number	06/08/2021
		701-123-4567		Yes	Monthly community meeting at Wade & 2nd ave	05/08/2021

Add — **Showing 1-2 of 2**

Emergency Contact Information (NCCEH)

		Start Date*	End Date	Is there a phone number where someone can get in touch with you or leave a message?	Email Address	Contact Type (Relationship to Client)	Emergency Contact Phone Number

Add

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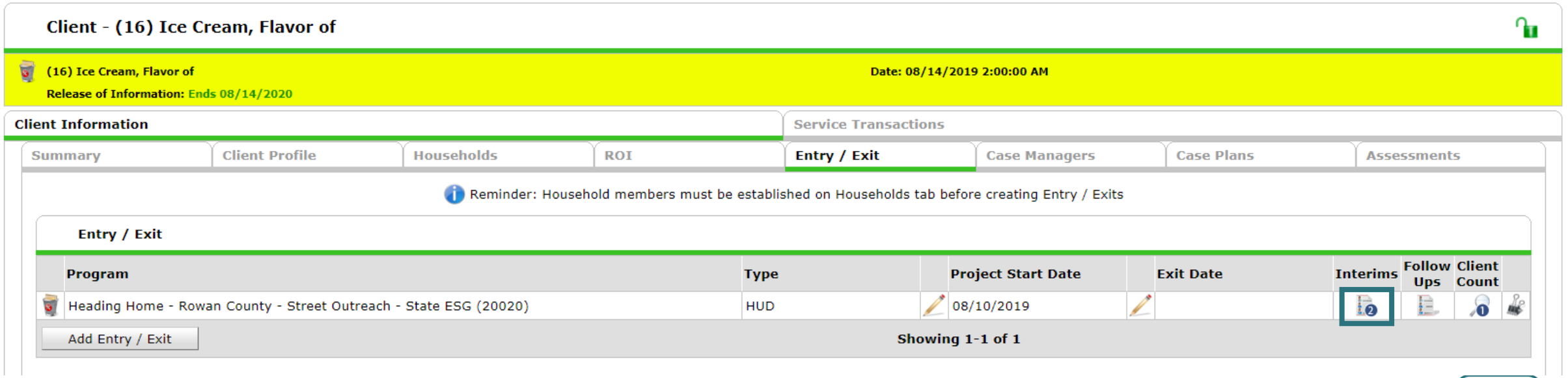
Complete client info at Date of Engagement

Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add new Interim Update to record Outreach contact that results in the Date of Engagement



NCCEH

Use Interim Update to complete info at Date of Engagement

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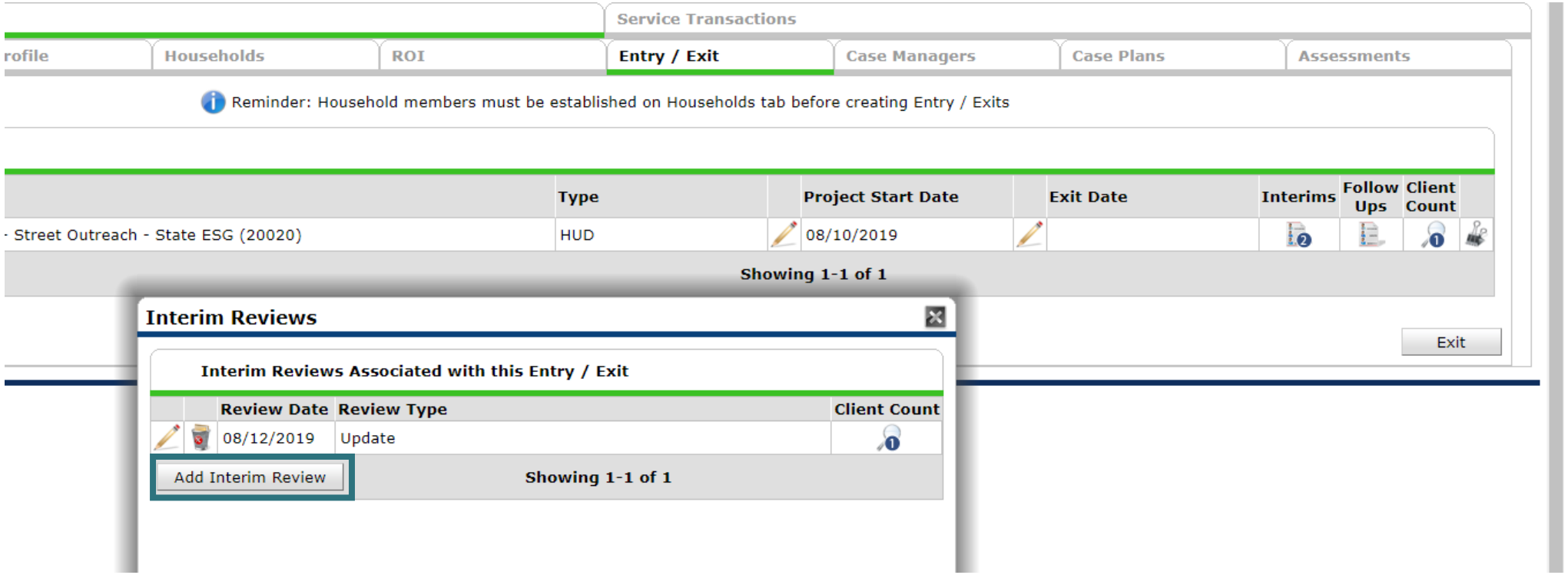
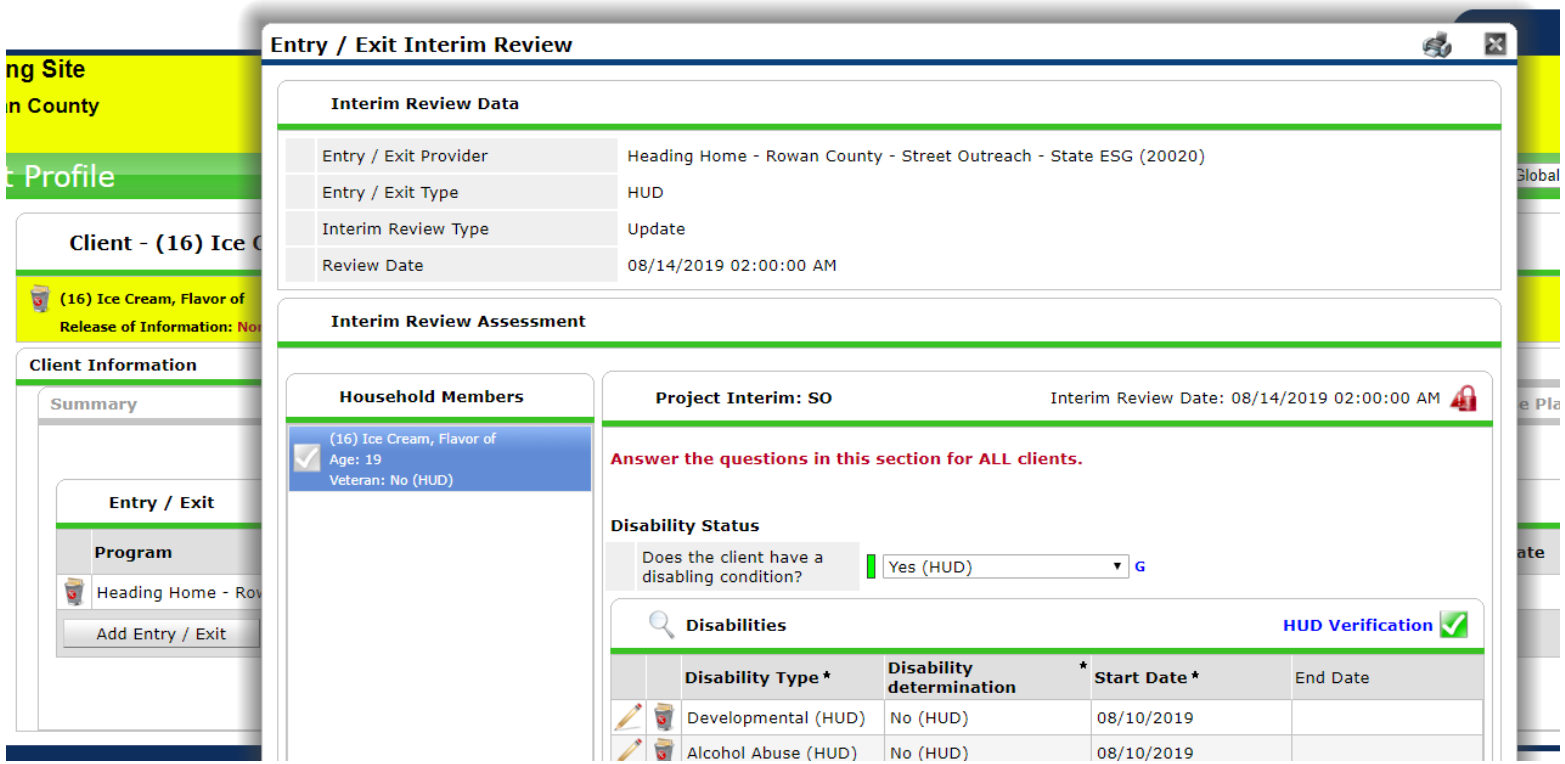


NCCEH

Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

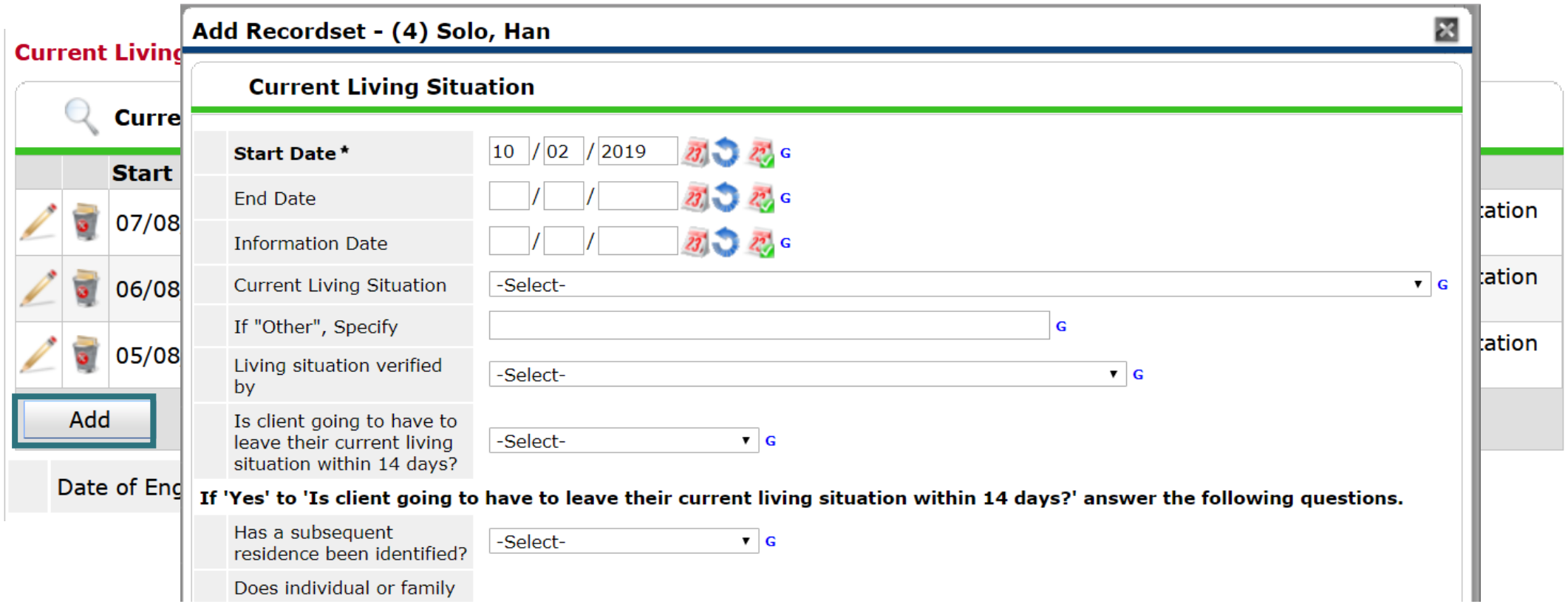
- Update any information gathered during this Outreach contact



Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add the next Current Living Situation for when Engagement occurred

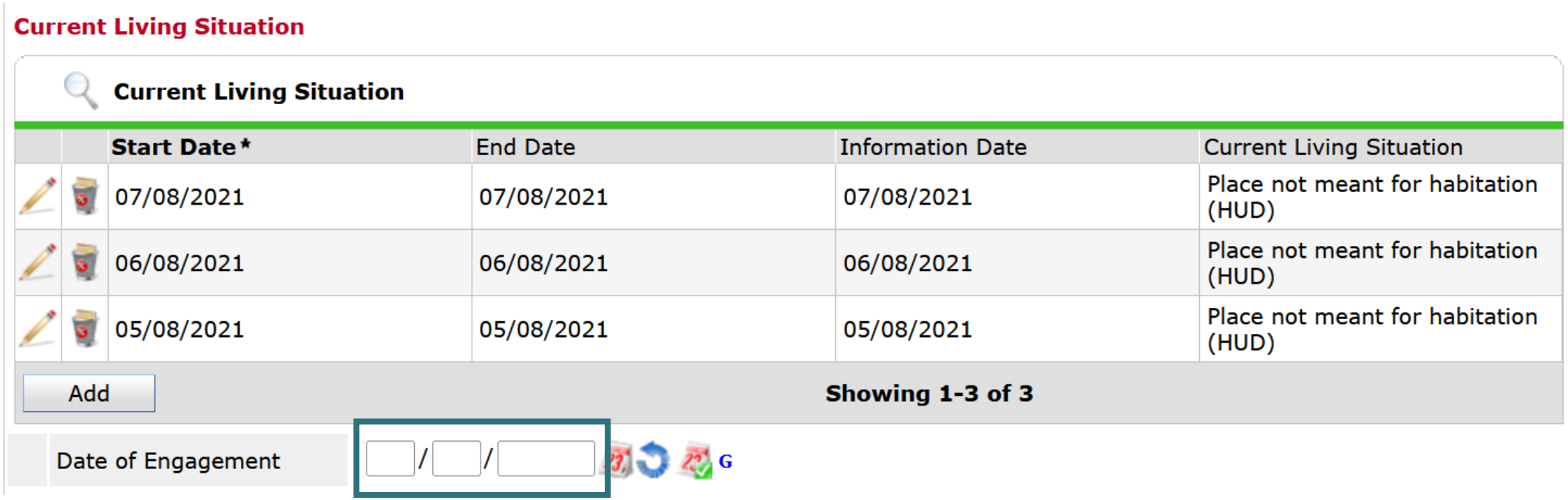


NCCEH

Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add the Date of Engagement



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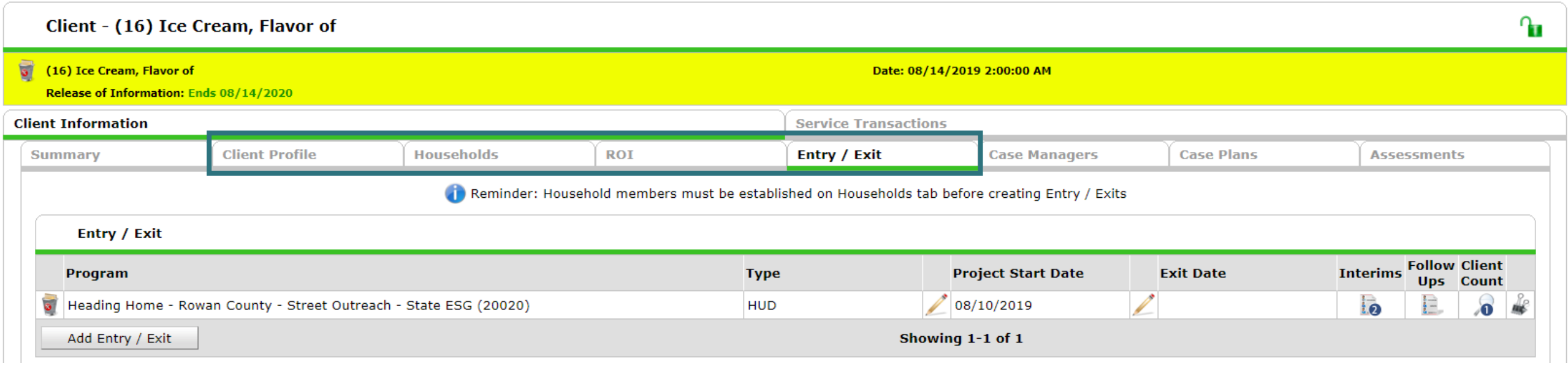
Now all data must be complete!

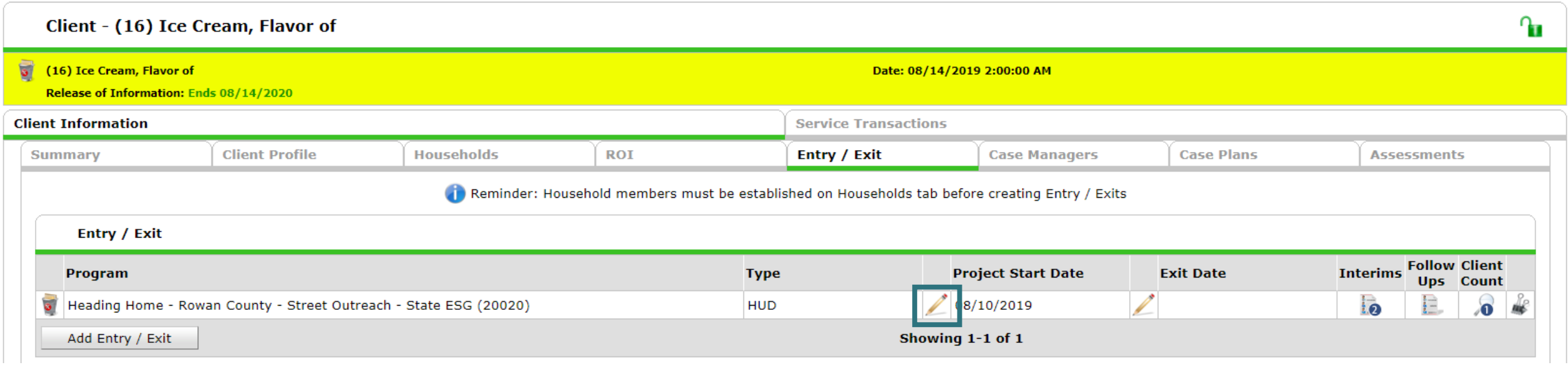
Client Profile, Household (if applicable), ROI, and Project Start must be complete for the client.



NCCEH

Now all data must be complete!

If there was any data on the Project Start Assessment missing, NOW is the time to complete it!



(You can keep backdate at Date of Engagement)

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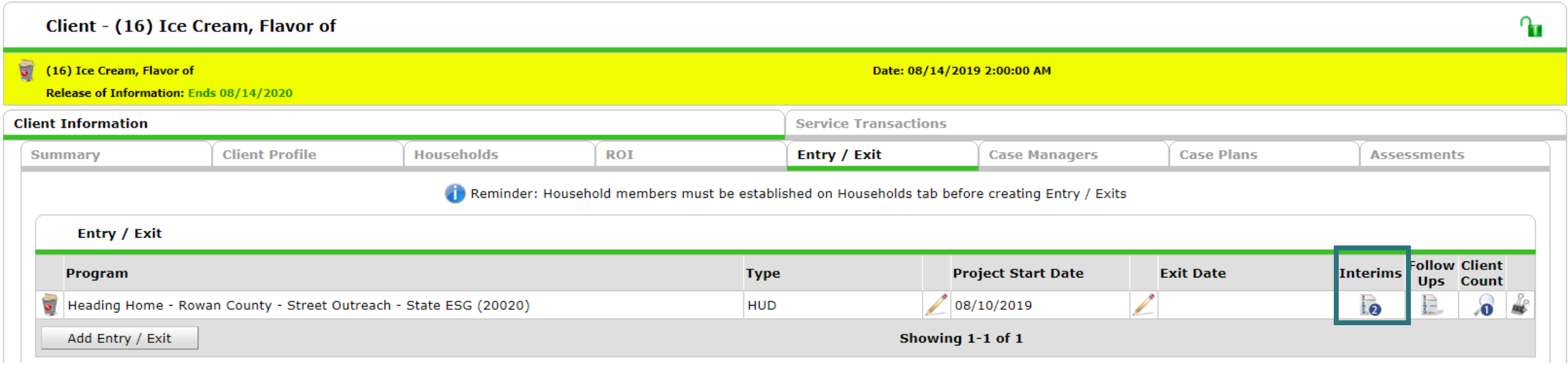
Data Collection after Date of Engagement

Use Interim Update to complete info at next contact



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Client can be exited without Dates of Engagement

Some clients will never fully engage in services

- Leave Date of Engagement blank
- The client's information may be incomplete at Project Start and Exit

Recording Outreach contacts even if some clients never engage allows a more accurate representation of the Outreach Worker's efforts!

- And records for funders reports/monitoring/etc.

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Exits from Street Outreach

Project Exits can happen two ways

Active Client Exits

- Positive exits
  - Housing
  - Shelter, temporary housing
- Negative exits
  - No exit interview completed
  - Unsheltered
- Neutral exits
  - Institutional, Jail, Hospital
  - Deceased

Inactive Client Exits

- No goodbye, client no longer able to be found
- Inactive after 90 days without contact (current living situation entered)
  - Local funding may specify less than 90 days
- Backdate to last contact, Exit client for the last living situation

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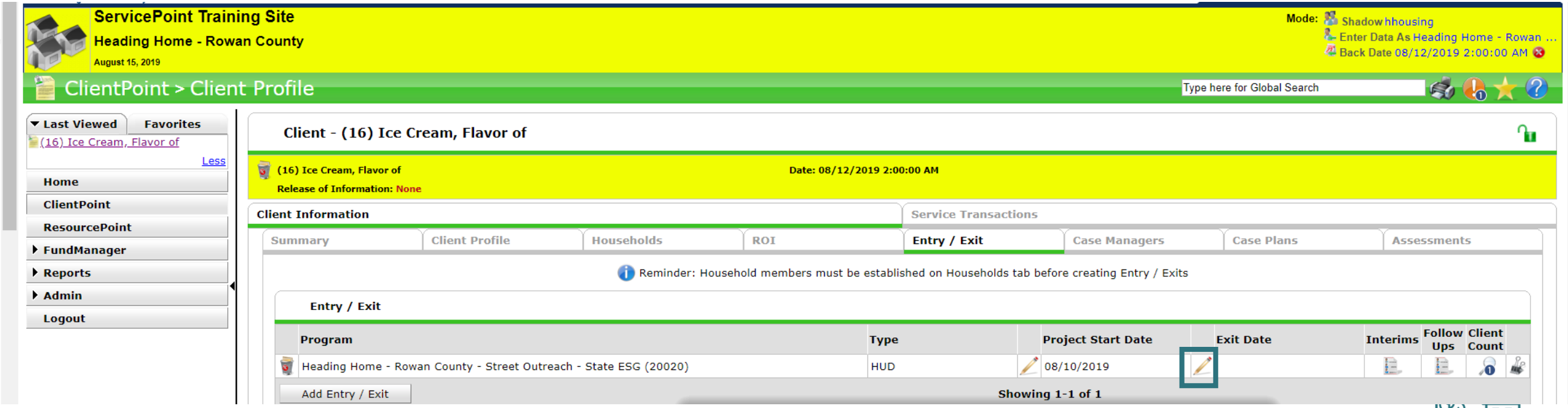
Exit clients from HMIS Project

Record exit on Entry/Exit tab

- Ensure backdate is correct date
- Click edit pencil next to Exit Date column

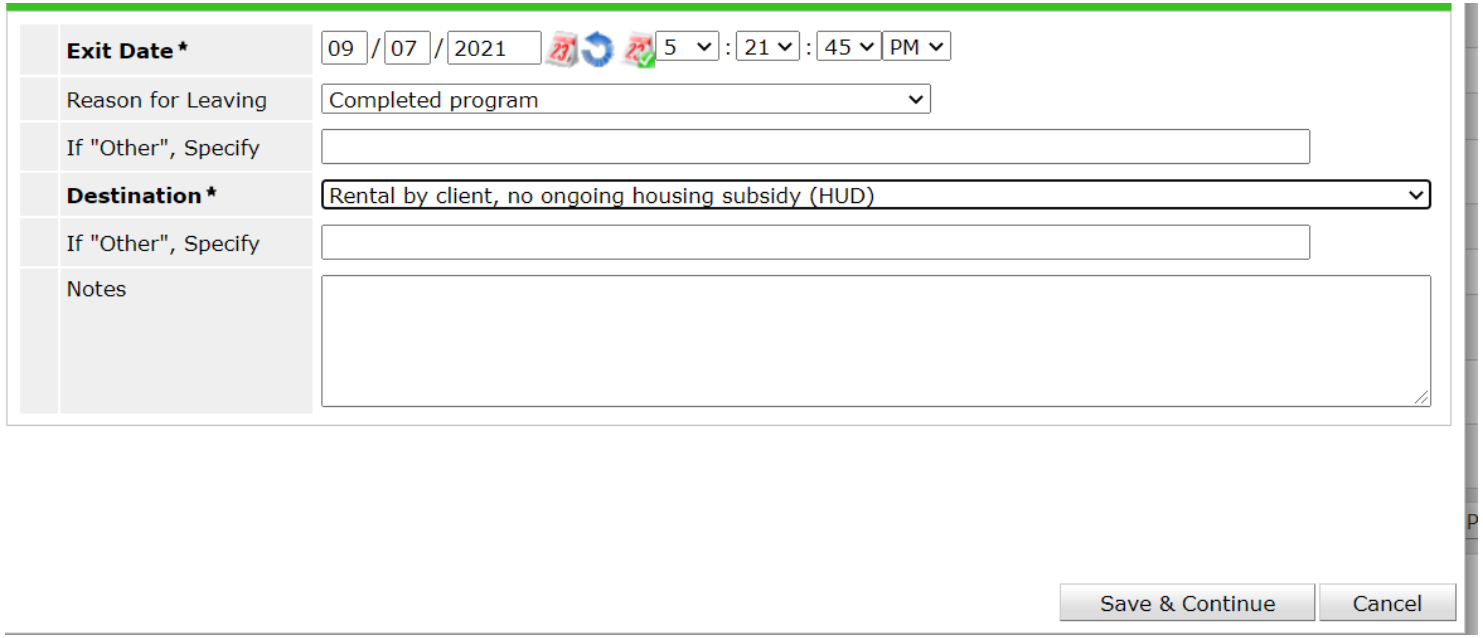


NCCEH

Exit clients from HMIS Project

Select exiting information

- Select appropriate reason for leaving and destination
- Click save and continue

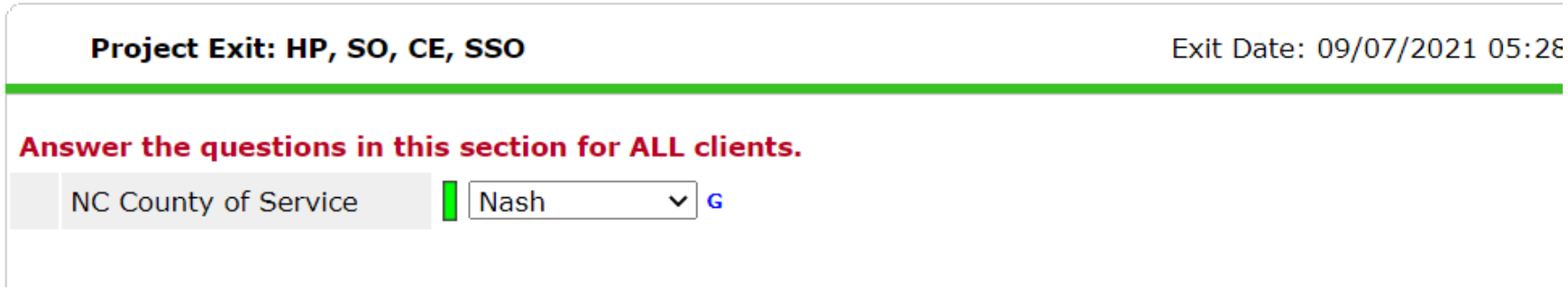


NCCEH

Exit clients from HMIS Project

Review and update information at exit

- Make sure data is correct/doesn't need any updates and save



NCCEH

Resources

Data Center Tools: NCCEH.ORG/HMIS

Forms & Helpdesk

Find important documents

Know where to find Guides

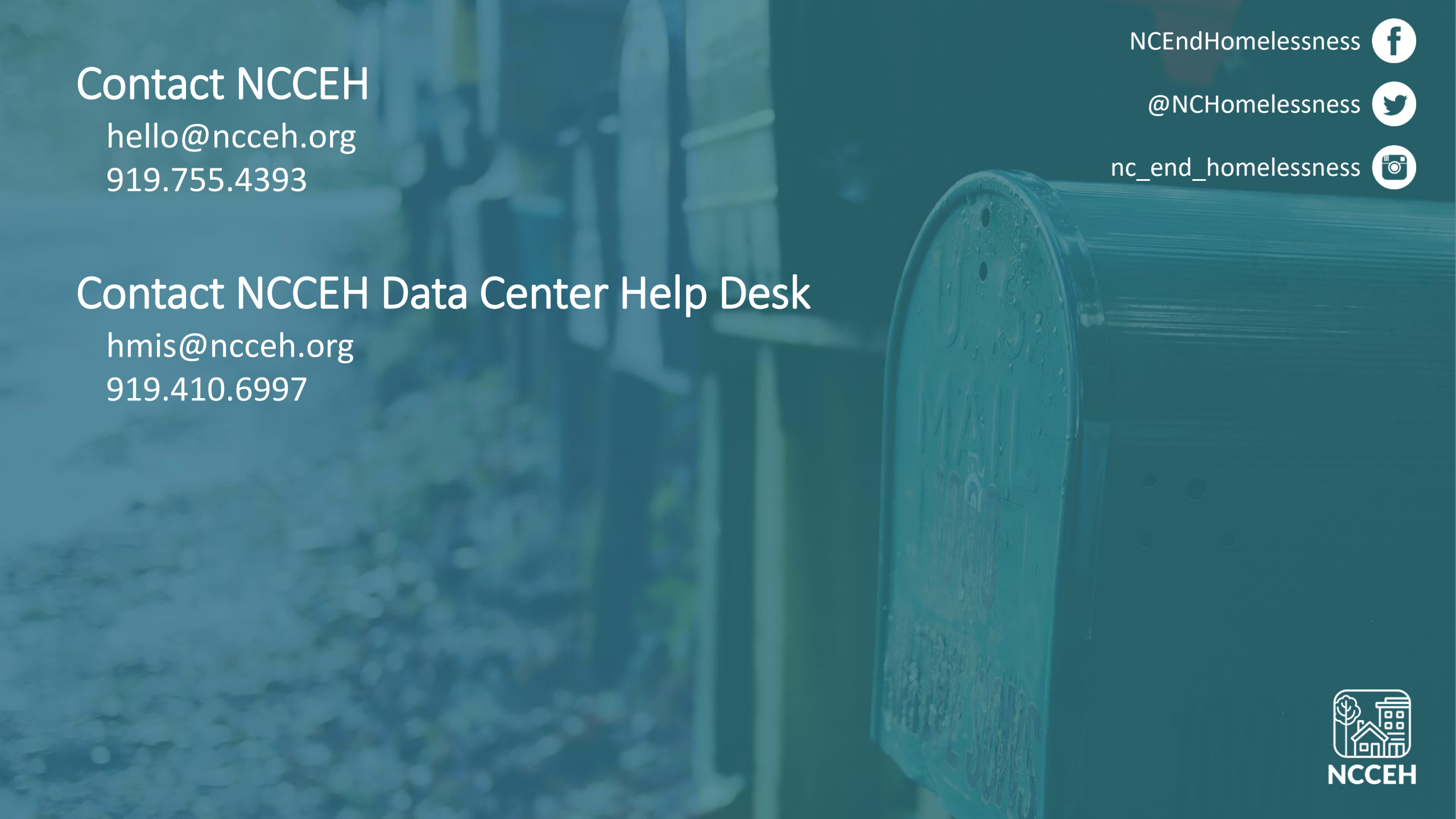
Catch up with Recent News

NCCEH

Street Outreach Resources

- Privacy Documents
  - Privacy Options guide
  - ROI
  - Privacy Conversation script
- Data Collections Documents
  - Regular Start, Interim, and Exit forms
  - Supplemental First Contact form
  - Supplemental Additional Contacts form
- Workflow Guides
  - Basic workflow, data elements, and HMIS steps under “Other Resources and Guides” section
  - Principles of Street Outreach Webinar

NCCEH



Contact NCCEH

hello@ncceh.org
919.755.4393

Contact NCCEH Data Center Help Desk

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919.410.6997

NCEndHomelessness

@NCHomelessness

nc_end_homelessness

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