

Street Outreach Workflow

December 2021



NC COALITION to
HOMELESSNESS end



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



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



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)



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.



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)





Data Collection Stages

Reminder

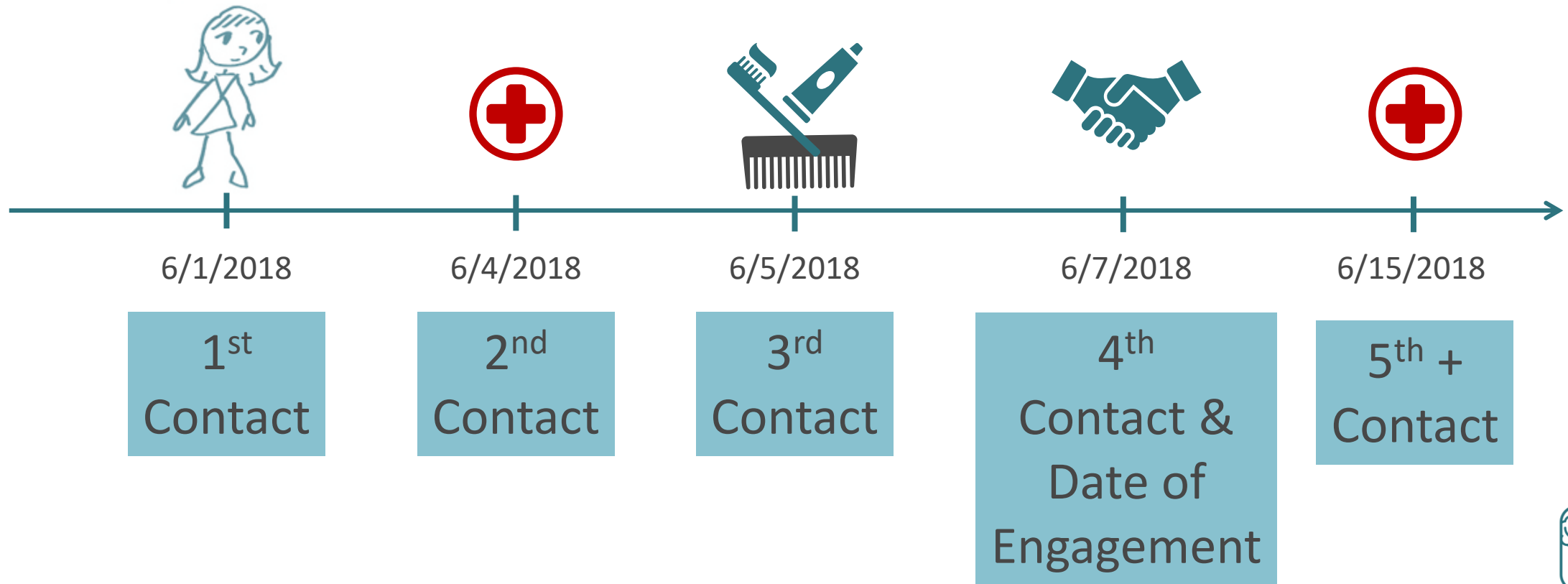
Project Start Date



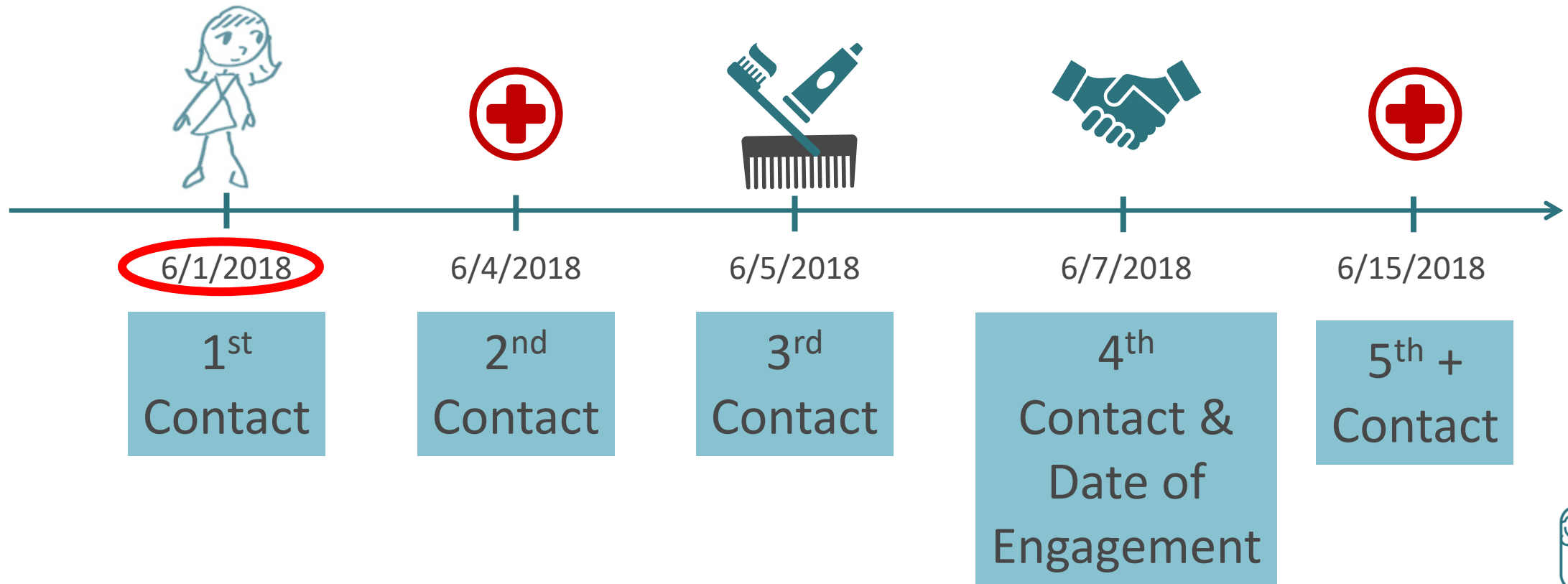
Collection Notes

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

Project Start Date: Street Outreach



Project Start Date: Street Outreach



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





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



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
<input type="checkbox"/> Full name reported
<input type="checkbox"/> Partial, street name or code name
<input type="checkbox"/> Client doesn't know (CDK)
<input type="checkbox"/> Client refused (CR)
<input type="checkbox"/> Data Not Collected (DNC)



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


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 shows the user name "Andrea Carey" and role "System Admin II". A yellow banner across the top contains the text "ServicePoint Training Site" and "Heading Home - Rowan County" with a date of "August 15, 2019". To the right of this banner, a "Mode:" dropdown menu is open, showing three options: "Shadow housing", "Enter Data As Heading Home - Rowan ..." (highlighted with a blue arrow), and "Back Date 08/10/2019 2:00:00 AM" (highlighted with a red 'X' icon). A blue arrow points from the "Heading Home - Rowan County" text to the "Enter Data As" option. Below the banner is a green navigation bar with "ClientPoint > Client Profile" and a search box labeled "Type here for Global Search". On the left side, there is a "Last Viewed" and "Favorites" sidebar with a link to "(16) Ice Cream, Flavor of" and a "Less" link. The main content area shows "Client - (16) Ice Cream, Flavor of" with a lock icon and a yellow bar below it containing "(16) Ice Cream, Flavor of" and "Release of Information: None". At the bottom of the main content area is a section titled "Client Information".

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 first 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

Client - (213) I-40 Exit 271, Red Umbrella

 (213) I-40 Exit 271, Red Umbrella
Release of Information: **None**

Client Information

Summary **Client Profile** Households ROI

 **Client Record**



Name	I-40 Exit 271, Red Umbrella
Name Data Quality	Partial, Street Name, or Code Name Reported
Alias	
Social Security	
SSN Data Quality	Data not collected (HUD)
U.S. Military Veteran?	No (HUD)
Age	



Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Record

Client Information		Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers
 Client Record					
Name	Ice Cream, Flavor of				
Name Data Quality	Full Name Reported				
Alias					
Social Security	***-**-1345				
SSN Data Quality	Full SSN Reported (HUD)				
U.S. Military Veteran?	No (HUD)				
Age					
 Client Demographics					
Date of Birth					
Date of Birth Type					
Gender					



Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Demographics

Client Demographics	
Date of Birth	08/10/2000
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	Native Hawaiian or Other Pacific Islander (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)



Client Profile: all projects	
Third Race	-Select- G



Complete as much as possible at first contact

Record what information you have after 1st contact

- Client Contact information

Third Race -Select- G

Fourth Race

Fifth Race

Driver's License/ID Number

Issuing State for ID

Home Phone / Contact Number

Client Contact Information (Client Profile)

Primary Phone Number G

Secondary Phone Number G

Receives Texts -Select- G

Email Address G

Social Media Handle or Website G

Other contact method (frequent location) G

Start Date * 08 / 10 / 2019 G

End Date / / G

Add

Save Save and Add Another Cancel

Complete as much as possible at first contact



Record what information you have after 1st contact

- Client Contact information

Client Profile: all projects

Third Race	<input type="text" value="-Select-"/>	G
Fourth Race	<input type="text" value="-Select-"/>	G
Fifth Race	<input type="text" value="-Select-"/>	G
Driver's License/ID Number	<input type="text"/>	G
Issuing State for ID	<input type="text" value="-Select-"/>	G
Home Phone / Contact Number	<input type="text"/>	G

Client Contact Information (Client Profile)

	Primary Phone Number	Secondary Phone Number	Start Date *
 	310-555-2021		08/10/2019

Showing 1-1 of 1




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

Client - (16) Ice Cream, Flavor of

 (16) Ice Cream, Flavor of Date: 08/10/2019 2:00:00 AM
Release of Information: **None**

Client Information Service Transactions

Summary Client Profile **Households** ROI Entry / Exit Case Managers

 **This Client is not currently a member of any Households.**

▶ **Previous Households**

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

Client - (213) I-40 Exit 271, Red Umbrella

(213) I-40 Exit 271, Red Umbrella
Release of Information: None

Client Information

Summary Client Profile

Client Record

Name	I-40 Exit 271, Red Umbrella
Name Data Quality	Partial, Street Name, or C
Alias	
Social Security	
SSN Data Quality	Data not collected (HUD)
U.S. Military Veteran?	No (HUD)
Age	

Client Demographics

Date of Birth	
---------------	--

Client Visibility

Client

Client	(213) I-40 Exit 271, Red Umbrella
Date Updated	08/15/2019 02:33:57 PM
Visibility Updated	08/15/2019 02:33:57 PM

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	08/15/2019
15165	Heading Home - Rowan County(7388) - Children Included	Public	08/15/2019

Showing 1-2 of 2

Issue ID Card

Change Clear

Exit

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

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of
Release of Information: None

Client Information

Summary Client Profile

Entry / Exit

Program

Add Entry / Exit

Project Start Data - (16) Ice Cream, Flavor of

Household Members

This Client is not a member of any Households.

Project Start Data - (16) Ice Cream, Flavor of

Provider * Heading Home - Rowan County - Street Outreach - State ESG (20020)

Type *
-Select-
-Select-
Basic
Basic Center Program Entry/Exit
HUD
PATH
Quick Call
RHY
Standard
Transitional Living Program Entry/Exit
VA

Project Start Date * 0 : 00 AM

Save & Continue Cancel

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

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(16) Ice Cream, Flavor of		08/10/2019						

Showing 1-1 of 1

Entry Assessment

Household Members

- (16) Ice Cream, Flavor of
Age: 19
Veteran: No (HUD)

Project Start: SO Entry Date: 08/10/2019 02:00:00 AM

Answer the questions in this section for every client

Date of Birth: 08 / 10 / 2000

Date of Birth Type: Full DOB Reported (HUD)

Gender: Male

Primary Race: Native Hawaiian or Other Pacific Islander (HUD)

Secondary Race: -Select-

Ethnicity: Non-Hispanic/Non-Latino (HUD)

Relationship to Head of Household: Self (head of household)

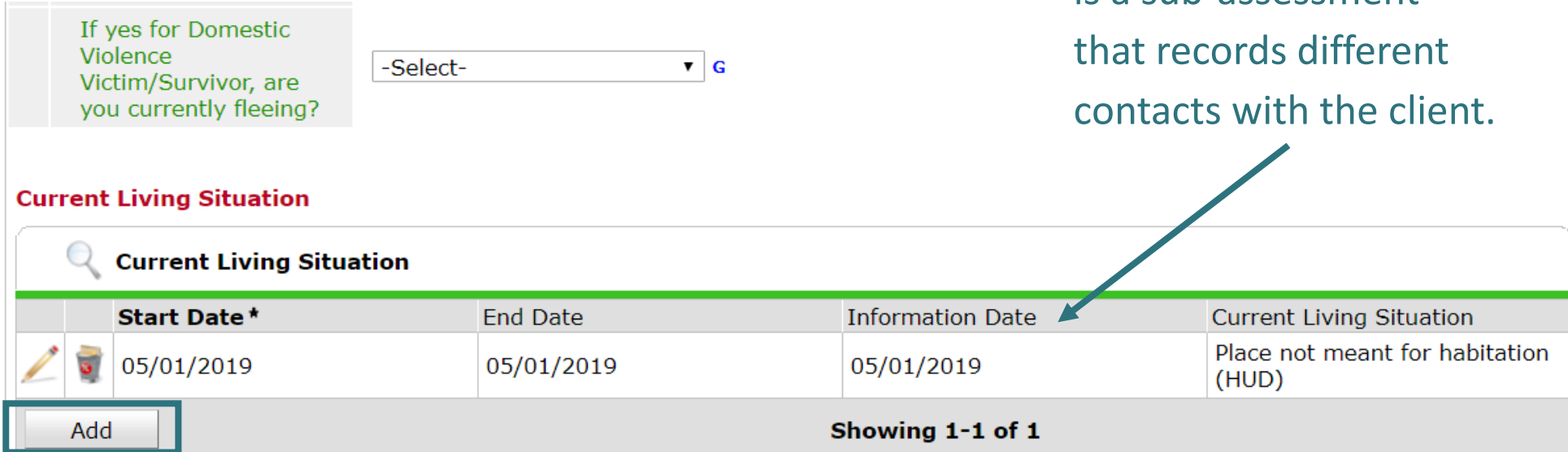
NCCEH

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.



If yes for Domestic Violence Victim/Survivor, are you currently fleeing? G

Current Living Situation

Current Living Situation

	Start Date *	End Date	Information Date	Current Living Situation
 	05/01/2019	05/01/2019	05/01/2019	Place not meant for habitation (HUD)

Add Showing 1-1 of 1

All Dates are the date of your data collection



Add Recordset - (4) Solo, Han

Current Living Situation

Start Date *	10 / 02 / 2019	G
End Date	/ /	G
Information Date	/ /	G
Current Living Situation	-Select- G	
If "Other", Specify	G	
Living situation verified by	-Select- G	
Is client going to have to leave their current living situation within 14 days?	-Select- G	

If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.

Has a subsequent residence been identified?	-Select- G	
Does individual or family have resources or support networks to obtain other permanent housing?	-Select- G	
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	-Select- G	
Has the client moved 2 or more times in the last 60 days?	-Select- G	

Save Save and Add Another Cancel

Using the same date here completes the 'snapshot'



Add Recordset - (4) Solo, Han

Current Living Situation

Start Date *	10 / 02 / 2019	G
End Date	/ /	G
Information Date	/ /	G
Current Living Situation	-Select-	G
If "Other", Specify		G
Living situation verified by	-Select-	G
Is client going to have to leave their current living situation within 14 days?	-Select-	G

If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.

Has a subsequent residence been identified?	-Select-	G
Does individual or family have resources or support networks to obtain other permanent housing?	-Select-	G
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	-Select-	G
Has the client moved 2 or more times in the last 60 days?	-Select-	G

Save Save and Add Another Cancel

Just like Prior Living Situation!



Use Lookup to select your project



Add Recordset - (4) Solo, Han

Current Living Situation

Start Date *	10 / 02 / 2019				G
End Date	/ /				G
Information Date	/ /				G
Current Living Situation	-Select-				
If "Other", Specify	<input type="text"/>				
Living situation verified by	-Select-				
Is client going to have to leave their current living situation within 14 days?	-Select-				

If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.

Has a subsequent residence been identified?	-Select-				
Does individual or family have resources or support networks to obtain other permanent housing?	-Select-				
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	-Select-				
Has the client moved 2 or more times in the last 60 days?	-Select-				

Only answer if Situation was a Institutional, Temporary, or Permanent location

Save Save and Add Another Cancel

This section helps determine if clients are Category 2 Homeless



The client has a Project Start after first contact

ServicePoint Training Site
Heading Home - Rowan County
August 15, 2019

Mode: Shadow hhousing
 Enter Data As Heading Home - Rowan ...
 Back Date 08/12/2019 2:00:00 AM

ClientPoint > Client Profile

▼ Last Viewed Favorites
 (16) Ice Cream, Flavor of [Less](#)

Home
ClientPoint
ResourcePoint
▶ FundManager
▶ Reports
▶ Admin
Logout

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM
Release of Information: **None**

Client Information Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	08/10/2019				

Showing 1-1 of 1



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



Collect Additional Data and More Engagement

Outreach Contact Supplemental

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

CLIENT (name or <u>other</u> identifier)

TYPE OF CURRENT LIVING SITUATION - Where was the client living during this contact with the client?
<input type="checkbox"/> Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)
<input type="checkbox"/> Emergency shelter, including hotel or motel paid for <i>with</i> emergency shelter voucher, or RHY-funded Host Home shelter
<input type="checkbox"/> Institution (add institution details below)
<input type="checkbox"/> Temporarily Housed (add temporary location details below)
<input type="checkbox"/> Permanently Housed (add permanent location details below)
<input type="checkbox"/> 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 <u>ie.</u> voucher <u>etc</u>)

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

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



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

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 shows the user "Andrea Carey" as "System Admin II". A yellow banner across the top contains the text "ServicePoint Training Site" and "Heading Home - Rowan County" with a left-pointing arrow, followed by "or" and a right-pointing arrow leading to a "Mode:" dropdown menu. The mode is currently set to "Shadow housing", with other options being "Enter Data As Heading Home - Rowan ..." and "Back Date 08/10/2019 2:00:00 AM". Below the banner is a green bar with "ClientPoint > Client Profile" and a search box labeled "Type here for Global Search". On the left is a sidebar with "Last Viewed" and "Favorites" sections, showing "(16) Ice Cream, Flavor of" and "Home" and "ClientPoint" buttons. The main content area shows "Client - (16) Ice Cream, Flavor of" with a lock icon and a yellow bar below it containing "(16) Ice Cream, Flavor of" and "Release of Information: None". At the bottom of the main area is a section titled "Client Information".

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.

Client - (16) Ice Cream, Flavor of 🔒

(16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM

Release of Information: **None**

Client Information **Service Transactions**

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

ℹ Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	08/10/2019				

Add Entry / Exit Showing 1-1 of 1

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

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

The screenshot displays a web application interface. On the left, a client profile is visible with the name '(16) Ice Cream, Flavor of' and a yellow header. The 'Client Information' section includes a 'Summary' tab and a 'Client Profile' tab. Below this, there is an 'Entry / Exit' section with a 'Program' dropdown set to 'Heading Home - Rowan County - Street Outreach - State ESG (20020)'. An 'Add Entry / Exit' button is located at the bottom of this section.

The main focus is a modal window titled 'Edit Project Start Data - (16) Ice Cream, Flavor of'. This window contains a 'Household Members' section with the message 'This Client is not a member of any Households.' Below this is a table for editing project start data:

Edit Project Start Data - (16) Ice Cream, Flavor of	
Provider	Heading Home - Rowan County - Street Outreach - State ESG (20020)
Type	HUD
Project Start Date *	08 / 10 / 2019 [calendar icon] [refresh icon] [2] : 00 : 00 AM

At the bottom of the modal window, there are two buttons: 'Save & Continue' and 'Cancel'.

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.

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"/>
Homeless History	
Prior Living Situation (Immediately Prior to Entry)	<input type="text" value="Place not meant for habitation (HUD)"/>
Length of Stay in Previous Place	<input type="text" value="90 days or more, but less than one year"/>
When did the client start staying on the streets or in emergency shelters this time?	<input type="text" value="04 / 02 / 2019"/>
Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today	<input type="text" value="Two times (HUD)"/>
Total number of months homeless on the street, in ES or SH in the past three years	<input type="text" value="8"/>



Add more information at the next contact

Record what information you have after the next contact

- Add an Interim to record the Outreach contact

The screenshot displays a client management system interface. At the top, the client name is "Client - (16) Ice Cream, Flavor of". Below this, a yellow banner shows the client name and the date "Date: 08/12/2019 2:00:00 AM". The interface is divided into two main sections: "Client Information" and "Service Transactions". The "Entry / Exit" tab is selected under "Service Transactions". A reminder message states: "Reminder: Household members must be established on Households tab before creating Entry / Exits". Below this, a table lists the entry/exit records. The table has columns for Program, Type, Project Start Date, Exit Date, Interims, Follow Ups, and Client Count. One record is shown: "Heading Home - Rowan County - Street Outreach - State ESG (20020)" with Type "HUD" and Project Start Date "08/10/2019". A blue box highlights the "Interims" column header, and a blue arrow points from it to the "Add Interim Review" button in the "Interim Reviews" modal window. The modal window shows "Interim Reviews Associated with this Entry / Exit" and a table with columns "Review Date", "Review Type", and "Client Count". The table is empty, displaying "No matches." The "Add Interim Review" button is highlighted with a blue box.

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	08/10/2019				

Review Date	Review Type	Client Count
No matches.		

Add more information at the next contact

Record what information you have after the next contact

- Add an Interim **Update**

Add Interim Review - (16) Ice Cream, Flavor of

Interim Review Data

Entry / Exit Provider	Heading Home - Rowan County - Street Outreach - State ESG (20020)		
Entry / Exit Type	HUD		
Interim Review Type *	-Select-		
Review Date *	Update	2	: 00 : 00 AM

Annual Assessment
Follow-up
Aftercare (Post Exit)

Save & Continue Cancel

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

Interim Review Assessment

Household Members

(16) Ice Cream, Flavor of
Age: 19
Veteran: No (HUD)

Project Interim: SO Interim Review Date: 08/12/2019 02:00:00 AM

Answer the questions in this section for ALL clients.

Disability Status

Does the client have a disabling condition? Yes (HUD) No (HUD)

Disabilities HUD Verification

	Disability Type *	Disability determination *	Start Date *	End Date
	Developmental (HUD)	No (HUD)	08/10/2019	
	Alcohol Abuse (HUD)	No (HUD)	08/10/2019	
	HIV/AIDS (HUD)	No (HUD)	08/10/2019	








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)

Showing 1-3 of 3






Date of Engagement / /    




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

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
<input type="button" value="Add"/>					





**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

Client - (16) Ice Cream, Flavor of 








 (16) Ice Cream, Flavor of Date: 08/14/2019 2:00:00 AM
Release of Information: Ends 08/14/2020

Client Information **Service Transactions**

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

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	 08/10/2019		 2		 1 

Showing 1-1 of 1

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

The screenshot displays a software interface for managing service transactions. The main window is titled 'Service Transactions' and has several tabs: 'Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', 'Case Plans', and 'Assessments'. The 'Entry / Exit' tab is active. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. Below this is a table with the following data:

	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
- Street Outreach - State ESG (20020)	HUD	08/10/2019		2		1

Showing 1-1 of 1

An 'Interim Reviews' pop-up window is open, showing 'Interim Reviews Associated with this Entry / Exit'. It contains a table with the following data:

Review Date	Review Type	Client Count
08/12/2019	Update	1

At the bottom of the pop-up window, there is an 'Add Interim Review' button and the text 'Showing 1-1 of 1'. An 'Exit' button is also visible in the bottom right corner of the main window.

Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Update any information gathered during this Outreach contact

Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider	Heading Home - Rowan County - Street Outreach - State ESG (20020)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	08/14/2019 02:00:00 AM

Interim Review Assessment

Household Members

<input checked="" type="checkbox"/>	(16) Ice Cream, Flavor of
	Age: 19
	Veteran: No (HUD)

Project Interim: SO Interim Review Date: 08/14/2019 02:00:00 AM

Answer the questions in this section for ALL clients.

Disability Status

Does the client have a disabling condition? Yes (HUD) No (HUD) G

Disabilities HUD Verification

	Disability Type *	Disability determination *	Start Date *	End Date
	Developmental (HUD)	No (HUD)	08/10/2019	
	Alcohol Abuse (HUD)	No (HUD)	08/10/2019	

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

Add Recordset - (4) Solo, Han

Current Living Situation

Start	End	Information Date	Current Living Situation	If "Other", Specify	Living situation verified by	Is client going to have to leave their current living situation within 14 days?	Has a subsequent residence been identified?	Does individual or family
		07/08						
		06/08						
		05/08						

Add

Date of Eng

Current Living Situation

Start Date * 10 / 02 / 2019 G

End Date / / G

Information Date / / G

Current Living Situation -Select- G

If "Other", Specify G

Living situation verified by -Select- G


Is client going to have to leave their current living situation within 14 days? -Select- G

If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.

Has a subsequent residence been identified? -Select- G

Does individual or family

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ation
ation










NCCEH

Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add the Date of Engagement

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)

Showing 1-3 of 3

Date of Engagement

 / / 

Now all data must be complete!

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

Client - (16) Ice Cream, Flavor of



(16) Ice Cream, Flavor of

Date: 08/14/2019 2:00:00 AM

Release of Information: Ends 08/14/2020

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	08/10/2019		2		1

Add Entry / Exit

Showing 1-1 of 1



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!

Client - (16) Ice Cream, Flavor of



(16) Ice Cream, Flavor of

Date: 08/14/2019 2:00:00 AM

Release of Information: Ends 08/14/2020

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (2020)	HUD	8/10/2019		2		1

Add Entry / Exit

Showing 1-1 of 1

(You can keep backdate at Date of Engagement)



NCCEH



Data Collection after Date of Engagement

Use Interim Update to complete info at next contact

Client - (16) Ice Cream, Flavor of



(16) Ice Cream, Flavor of
Release of Information: Ends 08/14/2020

Date: 08/14/2019 2:00:00 AM

Client Information | Service Transactions

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

i Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit			
Program	Type	Project Start Date	Exit Date
Heading Home - Rowan County - Street Outreach - State ESG (2020)	HUD	08/10/2019	

Interims 2	Follow Ups 	Client Count 1
----------------------	-----------------------	--------------------------

Add Entry / Exit

Showing 1-1 of 1



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.





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



Exit clients from HMIS Project

Record exit on Entry/Exit tab

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

ServicePoint Training Site
Heading Home - Rowan County
August 15, 2019

Mode: Shadowhousing
Enter Data As Heading Home - Rowan ...
Back Date 08/12/2019 2:00:00 AM

ClientPoint > Client Profile

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of
Date: 08/12/2019 2:00:00 AM
Release of Information: None

Client Information | Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	HUD	08/10/2019				






Add Entry / Exit

Showing 1-1 of 1

Exit clients from HMIS Project

Select exiting information

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

Exit Date *	09 / 07 / 2021    5 : 21 : 45 PM
Reason for Leaving	Completed program 
If "Other", Specify	<input type="text"/>
Destination *	Rental by client, no ongoing housing subsidy (HUD) 
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

Exit clients from HMIS Project

Review and update information at exit

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

Project Exit: HP, SO, CE, SSO

Exit Date: 09/07/2021 05:28

Answer the questions in this section for ALL clients.

NC County of Service

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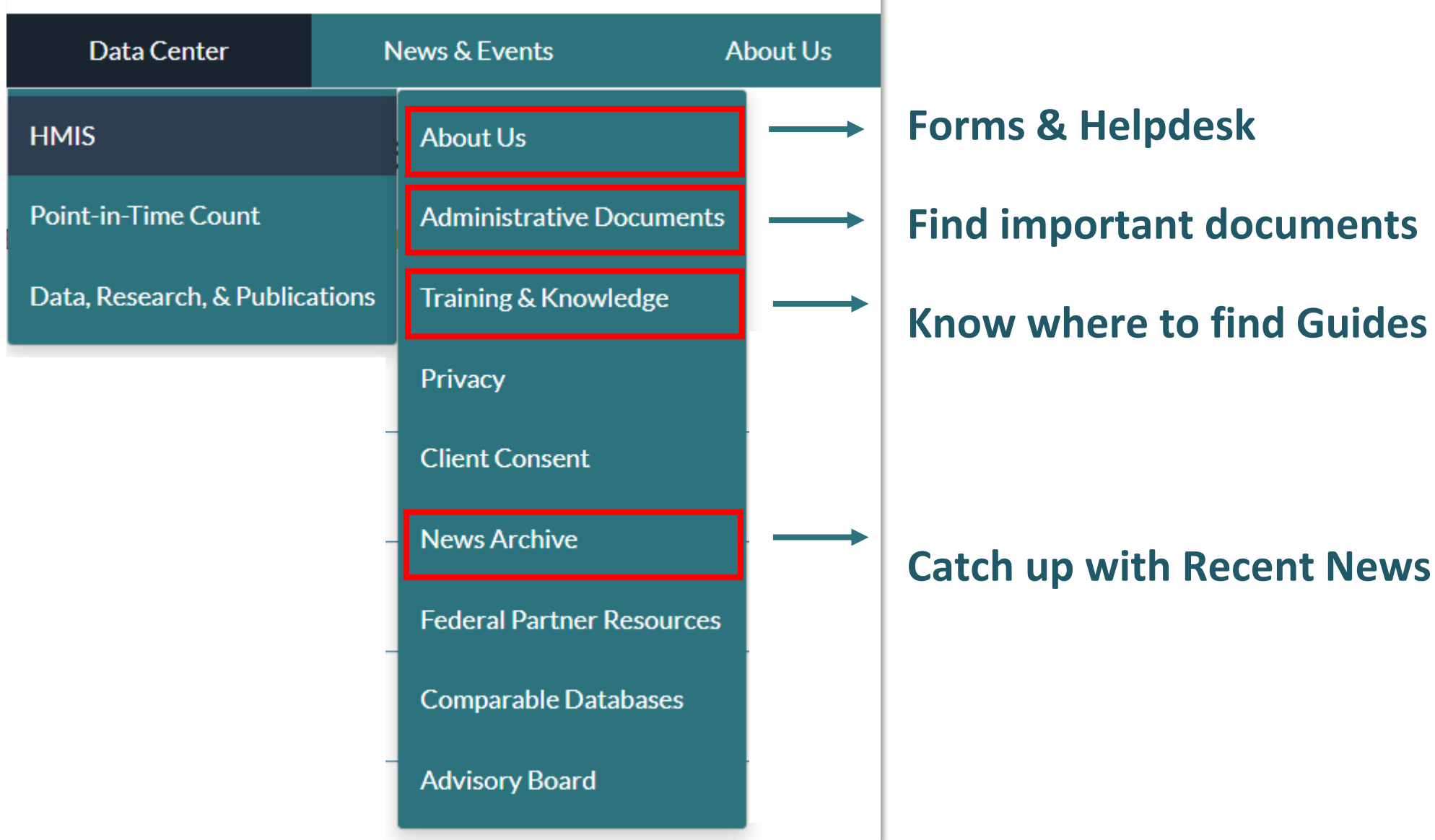


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Resources

Data Center Tools: NCCEH.ORG/HMIS



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



Contact NCCEH

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Contact NCCEH Data Center Help Desk

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