New Agency Guide

Welcome! The Data Center at the North Carolina Coalition to End Homelessness would like to welcome your agency to the Homeless Management Information System at NCCEH (HMIS@NCCEH) database! We serve as the HMIS Lead Agency for the Durham, NC Balance of State and Orange Continuum of Cares. Our role is to provide training, technical assistance, and reporting support to your agency. Through HMIS, your agency, community, and state and federal stakeholders will be able to track the types of homeless services and their effectiveness. This information is vital in our fight to end homelessness in North Carolina.

This guide provides an overview of the necessary steps to join HMIS@NCCEH officially. Here are those resources:

1. Frequently Asked Questions
2. Required Documents
3. Training & Support Overview

Frequently Asked Questions:

Why join HMIS@NCCEH?

You'll be able to track client data across multiple enrollments, refer clients easily to coordinated entry, and help report housing outcomes to funders. HMIS provides a centralized location for client notes and documents. If staff responsibilities change, notes and enrollments can support continuity of services. Since HMIS use is required to receive HUD funding, joining HMIS also sets you up for stronger applications for ESG and CoC grants.

Take it from a currently participating agency:

HMIS "is helpful when reporting program data to funders. It is a centralized place to review case note and client progress. We are also trying to utilize a canned report to assist with month end requisitions, specific to staff time as well as tracking distribution of bus passes and basic home goods. NCCEH data team is very responsive to questions and requests for help."

What does it cost to participate?

It's free! The CoC covers the cost of new agencies and their HMIS users. The CoC tries to reduce or remove barriers to HMIS participation and works to support your client services!

How long does it take to become a participating agency?

It varies. Agencies should anticipate a few weeks of transition for training, aligning intake and enrollment processes, and getting all paperwork signed. In order to set-up an agency's project or projects in HMIS, the Data Center will schedule a 30-60 minute call to learn more about the project and service specifics to determine the right configuration. With a concentrated effort, joining HMIS can occur within a week. Most agencies start conversations and planning 2-3 months ahead of the official training and participation tasks!

What should new agencies know going in?

HMIS is a tool that is as valuable as the effort you put into it. There's a common phrase with data systems, 'garbage in, garbage out.' That phrase describes how the data collected and entered into the system will impact the effectivness of any reporting out of the system. For your HMIS data entry to be successful, HMIS questions for intake and exits must be integrated into internal processes. If HMIS is an afterthought, data can quickly fall behind and become out-of-date. Make sure that staff and clients know that documenting changes are important to ensure that more clients are able to be connected to services!

What are the responsibilities with participation?

There are responsibilities expected from the agency as a whole and individual HMIS users.

Agencies
- Must have at least one HMIS user, the Agency Administrator. Agency Admins are designated by your agency's Executive Director or equivalent. Theymust stay up-to-date on the system and monitor data quality ensuring that their agency is meeting the minimum benchmarks laid out in the Data Quality Monitoring Plan. This role in HMIS is critical for Data Center communication and for access to reporting.
- Follow the Privacy and Security standards of HMIS@NCCEH.
- Enter and update client enrollments for a project on an ongoing basis.
- Integrate collection of HUD Data Standards into current workflow.
- Respond to NCCEH Data Center and CoC inquiries related to HMIS data quality.
- Inform the NCCEH Data Center when changes occur within their agency that specifically relate to HMIS and/or HMIS data quality.

Individual Users
- Follow HMIS Data Standards.
- Comply with the HMIS User Agreement and Code of Ethics.
- Log into the system at least once a month.
- Respond to Data Center inquiries.
- Pass annual privacy training.

Is the system customizable?

Yes and no. There are many options for tracking types of services in the system – everything from referrals to CoC Permanent Housing projects to bus vouchers to spending down grants. However, reporting capacity beyond looking up individual clients can vary. Consult with the Data Center to determine how HMIS can help track your

local priorities! In order to provide the most consistent data for stakeholders, the core workflow requirements for Coordinated Entry, Street Outreach, Shelters, Transitional Housing, Rapid Re-Housing, and Permanent Supportive Housing standards apply across HMIS@NCCEH. Our CoCs are responsible for reporting the data collected to HUD and want to set you up for success!

What kind of support is available?

Our Data Center Helpdesk is available for questions and support from the very beginning. Training for new HMIS users and other on-going training opportunities are available through the Learning Management System. ZenGuide is a searchable knowledge base with reference materials for HMIS users. Monthly meetings for HMIS users also provide support opportunities to get system updates and ask for demos or troubleshooting. If you've had the question, likely others have too, and these HMIS Users Meetings are a place to learn from each other!

Required Documents

There are a few foundational documents needed to set your agency up in HMIS. The Data Center utilizes DocuSign, an email-based system to allow virtual signatures. No more mailing or faxing docs!

1. [HMIS@NCCEH Operating Policies and Procedures](#).
    a. View the [HMIS@NCCEH Operating Policies and Procedures](#) here.
    b. Operating Policies and Procedures defined in this document represent the minimum standards of participation in the HMIS project and represent general "best practice" operational procedures.
2. Agency Participation Agreement
    a. View a [sample here](#).
    b. Signed by Agencies before joining HMIS@NCCEH.
3. User Agreement and Ethical Standards
    a. View a [sample here.](#)
    b. Signed by all HMIS users to ensure privacy and security of client data.
4. HMIS Privacy Notice
    a. View a [template copy here](#).
    b. Agencies may use the provided template or customize it using the requirements in Section IIIA of the [HMIS@NCCEH Operating Policies and Procedures](#).
5. HMIS Privacy Sign
    a. View the [HMIS Privacy Sign](#).
    b. Posted in locations where clients can clearly see them, especially places where intakes and data gathering are done.
6. HMIS Releases of Information
    a. View a copy of [the paper version](#) or the [verbal consent script](#).

Training & Support Overview

All HMIS Basic Users (referred to as Case Managers in CommunityServices) are required to take trainings and pass their corresponding quizzes in the Learning Management System. The standard set of trainings take about 3.5 hours to view but allow additional time to complete a practice client workflow. To have the most efficient, supportive training experience possible, make sure to review the list of trainings sent by the Data Center before you begin.

All additional HMIS trainings can be referenced later at ncceh.org/hmis/news. While some users complete the trainings in less than a day, new users must complete all required trainings within 30 days of the introductory email.

More questions? Let's set up time to talk with the Data Center! Email our team at hmis@ncceh.org or leave us a message at 919-410-6997.