HMIS Users Meeting

December 2021

NC COALITION to end HOMELESSNESS

Agenda

December 2021

System Updates

- Moving On Assistance
- ART planned downtime
- Federal Reporting Season
  - Client Level Corrections
  - Check-Ins

How Can We Help?

- Emergency Housing Vouchers
- NCCEH Website Review
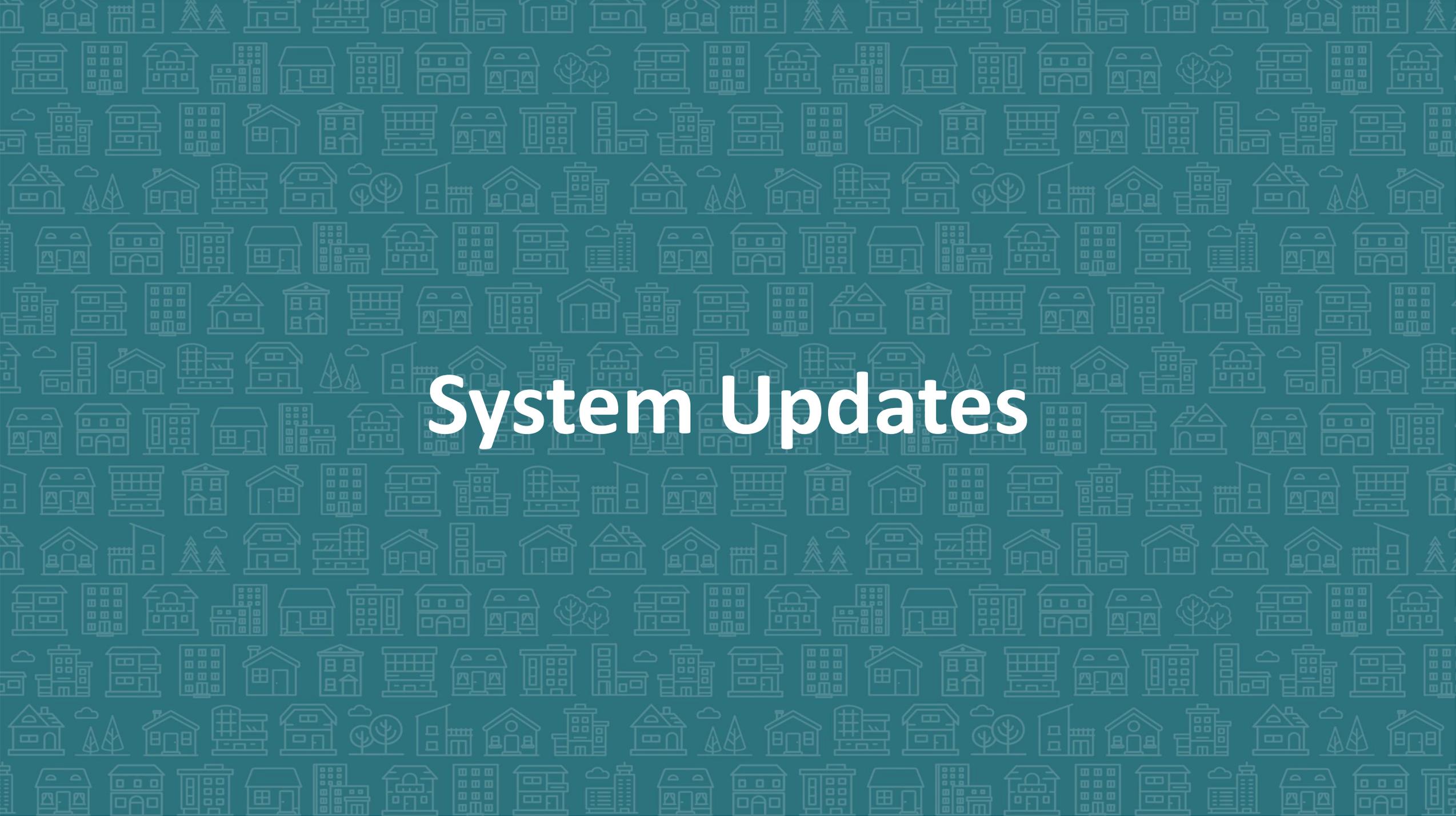- New Report: Unsheltered Contact Information

What's Next

- Winter Beds
- LMS Launch!
- HMIS Calendar

Demo/Troubleshooting

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System Updates

PSH Projects Only: Moving On data moved!

- Go to ncceh.org/hmis/training for a review of how to record Service Transactions

PSH Projects Only: Moving On data moved!

WellSky

C2 – Moving On Assistance Provided – CoC Funded

Record for head of household only. Record at Occurrence Point each time the service is provided.

Type of CoC Funded Service Provided	Service Description	Service Code
Subsidized housing application assistance	Benefits Assistance	FT-1000
Financial Assistance for Moving On (e.g., security deposit, moving expenses)	Rental Deposit Assistance	BH-3800-7250
	Moving Assistance	BH-5000 and related
Non-financial assistance for Moving On (e.g., housing navigation, transition support)	Housing Search and Information	BH-3900 and related
	Case/Care Management	PH-1000
Housing referral/placement	Supportive Housing Placement/Referral	BH-8500 and related
Other (please specify)	Varies	Varies

Use the Service that best fits (in this order 1-4)

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Client - (4) Solo, Han 🔓

(4) Solo, Han

Release of Information: None

-Switch to Another Household Member- ▾   Submit

Client Information	**Service Transactions**

Add Service

▼   Household Members

ℹ️   **To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.**

☐ **(125413) Single Parent**

　☑ (4) Solo, Han   (Primary Client)

　☐ (501224) Solo, Ben

Service Provider *	Partners BHM - Multiple BoS Counties - PSH - HUD (5061) ▾
Creating User	Andrea Carey
Start Date *	12 / 02 / 2021 📅🔄📅 9 ▾ : 30 ▾ : 55 ▾ AM ▾
End Date	12 / 02 / 2021 📅🔄📅 9 ▾ : 34 ▾ : 50 ▾ AM ▾
Service Type *	Rental Deposit Assistance (BH-3800.7250) ▾ Look Up
Provider Specific Service	-Select- ▾

Save & Continue   Cancel

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Service Provider *	✏️ Partners BHM - Multiple BoS Counties - PSH - HUD (5061)
Creating User	Andrea Carey
Start Date *	12 / 02 / 2021 📅🔄📅 9 ⌄ : 30 ⌄ : 55 ⌄ AM ⌄
End Date	12 / 02 / 2021 📅🔄📅 9 ⌄ : 34 ⌄ : 50 ⌄ AM ⌄
Service Type *	✏️ Rental Deposit Assistance (BH-3800.7250)
Provider Specific Service	-Select- ⌄
Service Notes	

Moving On Assistance	-Select- ⌄

-Select-

Subsidized housing application assistance

Financial assistance for Moving On (e.g., security deposit, moving expenses)

Non-financial assistance for Moving On (e.g., housing navigation, transition support)

Housing referral/placement

Other (please specify)

Service Costs

Number of Units

Unit Type

Cost per Unit

Total Cost of Units

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Service Provider*	✏️ Partners BHM - Multiple BoS Counties - PSH - HUD (5061)	
Creating User	Andrea Carey	
Start Date*	12 / 02 / 2021 📅🔄📅 9 ⌄ : 30 ⌄ : 55 ⌄ AM ⌄	
End Date	12 / 02 / 2021 📅🔄📅 9 ⌄ : 34 ⌄ : 50 ⌄ AM ⌄	
Service Type*	✏️ Rental Deposit Assistance (BH-3800.7250)	
Provider Specific Service	-Select- ⌄	
Service Notes		

Make sure these correspond

Moving On Assistance	Financial assistance for Moving On (e.g., security deposit, moving expenses) ⌄	

Service Costs

Number of Units	
Unit Type	-Select- ⌄
Cost per Unit	$
Total Cost of Units	

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PSH Projects Only: Moving On data moved!

C2 – Moving On Assistance Provided – CoC Funded

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	Case/Care Management	PH-1000
Housing referral/placement	Supportive Housing Placement/Referral	BH-8500 and related
Other (please specify)	Varies	Varies

Service Costs

Number of Units		
Unit Type	-Select-	
Cost per Unit	$	
Total Cost of Units		

Apply Funds for Service

Conditional Commitments

	Responsible Party ▲	**Condition**
Add Conditional Commitment	Print Commitment Letter	No matches.

Support Documentation

	Date Added ▼ **Name**	**Description**
Add Support Documentation		No matches.

Follow Up Information

Projected Follow Up Date	__ / __ / ____
Follow Up User	Partners BHM - Multiple BoS Counties - PSH - HUD (5061)
	-Select-
Follow Up Made	-Select-
Completed Follow Up Date	__ / __ / ____

Skip!

Save & Exit

Need Information

Need Status*	Closed ⌄	
Outcome of Need	Fully Met ⌄	
If Need is Not Met, Reason	-Select- ⌄	

Save Save & Exit Exit

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ART Upgrade

SAP BusinessObjects 4.3 offers enhanced reporting and dashboarding, with a familiar interface that allows you to keep the ART reports you use now

WellSky is pleased to report that after an extensive proof-of-concept review, we will upgrade WellSky Community Services' Advanced Reporting Tool (ART) to SAP BusinessObjects 4.3.

Bring powerful new analytics to your agency

BusinessObjects 4.3 offers a host of new data visualization features. You can create new report types in the same simple query format you already know.

Simplify user adoption with a familiar solution

Your users are already familiar with SAP BusinessObjects, so onboarding will require limited training. While there are some changes in the move from versions 3.1 to 4.3, most changes, starting with the streamlined Launchpad, create a much more friendly user experience.

Keep your current reports, folders, and data visibility and security rules

WellSky will migrate existing public reports into BusinessObjects 4.3 so you will not have to recreate them. All folder structures remain intact, keeping your reports organized as you have intended. BusinessObjects 4.3 will also continue to enforce Community Services' data visibility and security rules.

All familiar methods for reporting are still available, from easy-to-use tabs with tables, to simple count charts, to more advanced graphs and visualizations.

Use almost any modern browser

BusinessObjects doesn't require browser plug-ins. It supports all modern browsers, like Chrome, Safari, FireFox, and Edge.

No additional cost to you!

WellSky is pleased to be able to offer this upgraded version of BusinessObjects without increasing end user license fees.

Do more with your data

BusinessObjects 4.3 supports downloading reports in CSV, HTML, PDF, and XLSX. You can also schedule reports for automatic file exports.

Timeline Information

When will the current version of ART no longer be available?
The release plan for BusinessObjects 4.3 is currently scheduled for full deployment to all sites on or around February 1, 2022. At the time of the upgrade, the current version of BusinessObjects 3.1 will no longer be accessible.

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HUD Reporting Season

LSA – Longitudinal System Analysis

AHAR – Annual Homelessness Assessment Report

SPM – System Performance Measures

HIC – Housing Inventory Count

PIT – Point in Time Count

HUD Report Corrections FAQs

Deadline
- Errors sent beginning October 4th
- Corrections/reviews due November 12th

What are expectations for agencies?
- Review the list of client issues and correct if you have accurate info
- Corrections shared by HMIS Users
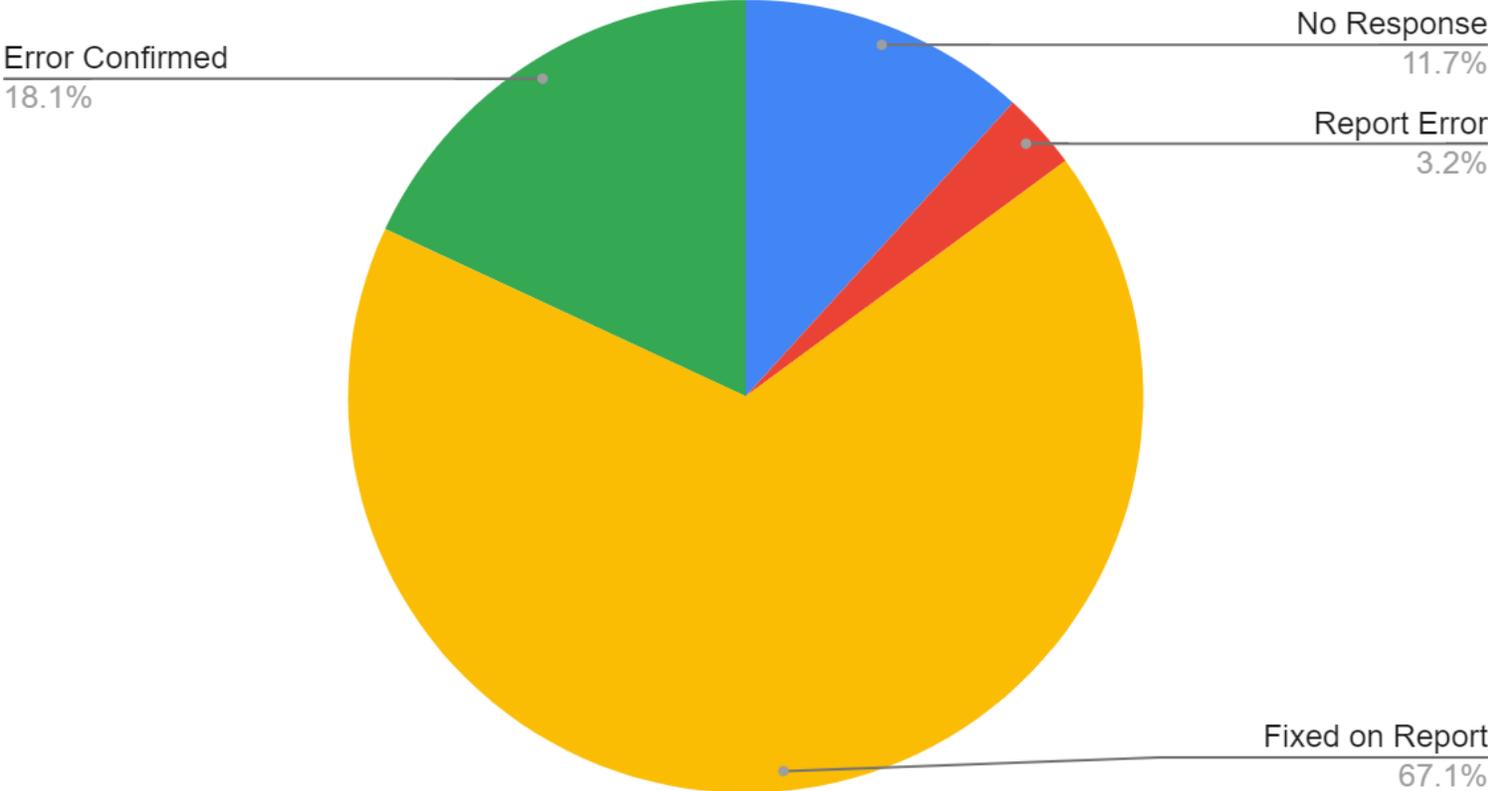- Communication from Agency Admins for ongoing progress each week

What are the possible responses to a list of corrections?
- It's corrected! (yay!)
- I cannot correct it. (confirmed)
- It looks correct when I look at this. (potential report issue)

Reports refreshed **10/18**, **11/1**, **11/12**

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Summary of Client Corrections

Total

Error Confirmed
18.1%

No Response
11.7%

Report Error
3.2%

Fixed on Report
67.1%

Status	NC BoS CoC's Count
No Response	659
Report Error	177
Fixed on Report	3767
Error Confirmed	1015

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Agency HMIS Check-Ins

Agency Checklist

Agency leadership is responsible for completing and returning to the Data Center

Agency Name: _____

HMIS Data Quality

☐Yes ☐No	Agency runs the APR or CAPER on a regular basis to verify the data and correct errors as appropriate.
☐Yes ☐No	Agency runs other reports on a regular basis to verify their data and correct errors as appropriate.
☐Yes ☐No	Agency is aware of the CoC's HMIS benchmarks, as part of the developing Data Quality Plan.
☐Yes ☐No	Agency has developed and follows a self-monitoring plan* to ensure quality of data in HMIS.

A comprehensive HMIS Data Self-Monitoring Plan should include the following components: Identifies specific reports to be used for each project; defines the reporting date range to use and the frequency at which reports are reviewed; names those responsible for running reports, data cleanup needed and verifying cleanup was done; and establishes a timeframe to complete this process.

HMIS User and Project Set-Up

☐Yes ☐No	Agency has reviewed the list of users and confirms all users are still active.
☐Yes ☐No	Agency has reviewed the list of users and confirms all users have accurate Enter Data As rights.
☐Yes ☐No	Agency has reviewed the list of projects and confirms all projects are ACTIVE.
☐Yes ☐No	Agency has reviewed the list of projects and confirms all projects have CURRENT funding details.
☐Yes ☐No	Agency has reviewed the list of projects and confirms all residential projects have accurate addresses.
☐Yes ☐No	Agency has reviewed the list of projects and confirms all residential projects have accurate bed lists.

Corrections or Additional Notes:

Agencies will need to confirm:

- Review individual correction questions (if needed)
- Review HMIS Users and Roles
- Review Funding Sources and Projects
- Review Bed and Unit Inventory

Required for HMIS participating agencies with (SO, ES, TH, RRH, or PSH)

- Watch out for an email to schedule
- Will take place between November and January

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How Can We Help?

Emergency Housing Vouchers Exits

Exiting households to EHV when household is leased-up

- Step one: under Exit data > Destination > Rental by client, with HCV voucher (tenant or project based) (HUD)

Edit Exit Data - (4) Solo, Han

Exit Date *	08 / 11 / 2021 3 : 48 : 21 PM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client, with HCV voucher (tenant or project based) (HUD)
If "Other", Specify	

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Emergency Housing Vouchers Exits

Exiting households to EHV when household is leased-up

- Step two: under Exit Assessment>CE event > EHV & Project

Coordinated Entry Event

Date of Event*	08 / 11 / 2021 G
Event*	Referral to Emergency Housing Voucher (EHV) G

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Location of Crisis Housing or Permanent Housing Referral	Bladenboro Housing Author Lookup Clear G

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Referral Result	Successful referral: client accepted G

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Date of Result	08 / 11 / 2021 G

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Emergency Housing Vouchers Exits

PSH Projects may offer aftercare for up to 6 months after exit

In HMIS, aftercare without financial assistance is not considered part of PSH enrollment
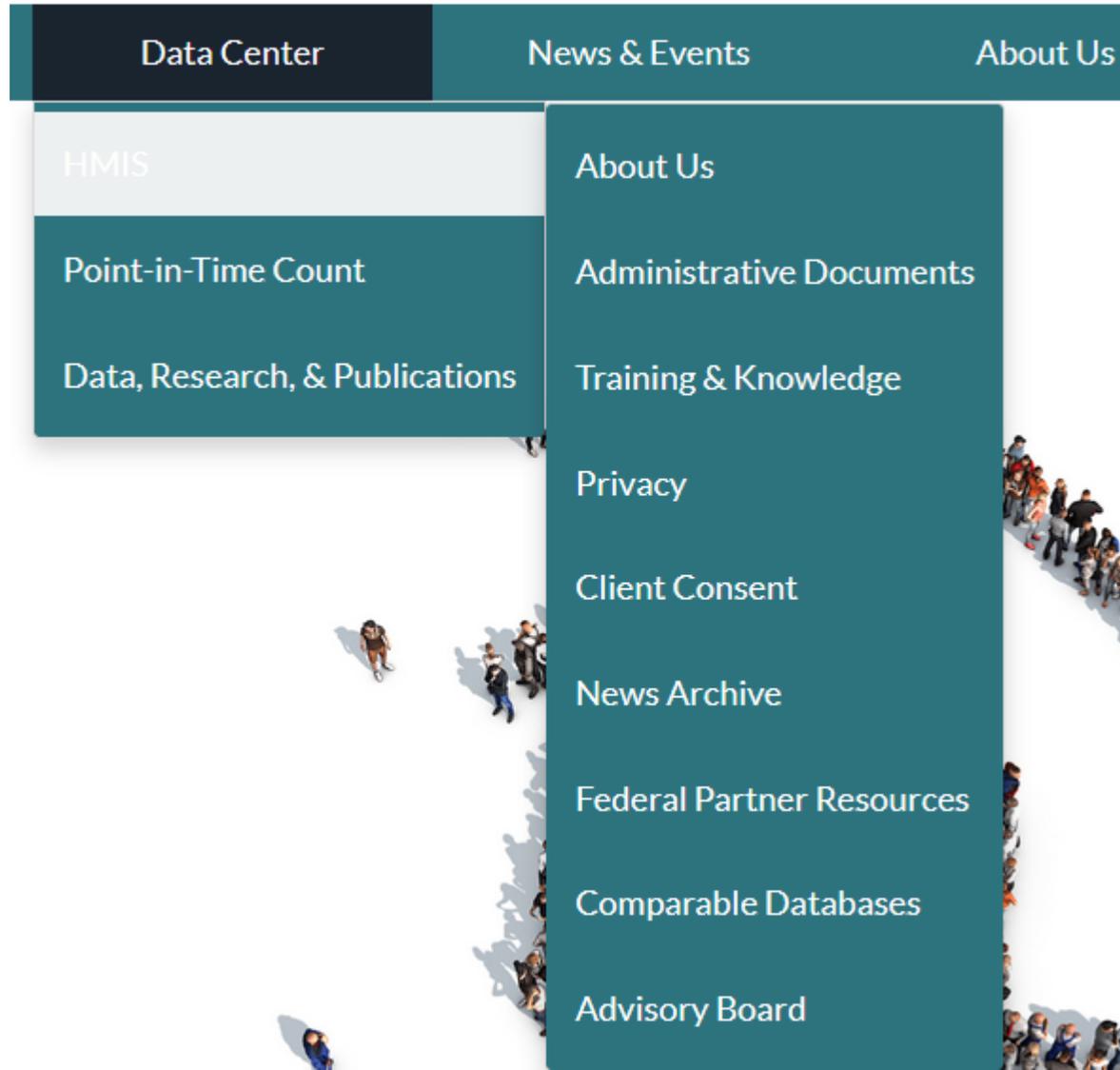
Once financial assistance ends:

1. Exit the client in HMIS
2. Record the CE Event for Referral to EHV in HMIS
3. Record client services for up to 6 months in client file

Reach out to Helpdesk to plan your data!

NCCEH Website Review

Data Center | **News & Events** | **About Us**

HMIS
Point-in-Time Count
Data, Research, & Publications

About Us
Administrative Documents
Training & Knowledge
Privacy
Client Consent
News Archive
Federal Partner Resources
Comparable Databases
Advisory Board

Highlights

- Administrative
- Training & Knowledge
- Client Consent
- News Archive

New Report: Unsheltered Contact Information
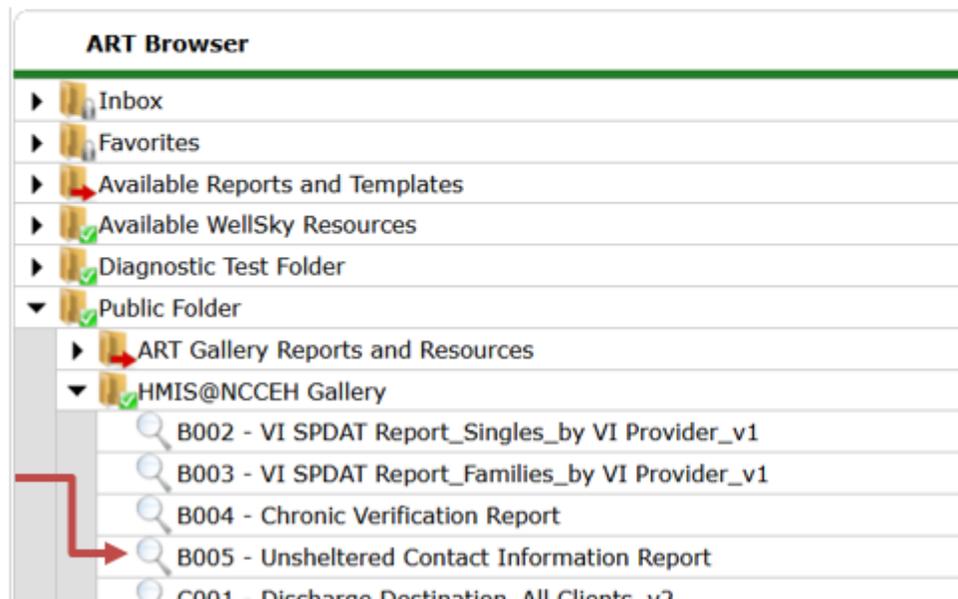
- B005 – Unsheltered Contact Information Report

Unsheltered Client Contact Information Details Report Guide

Summary: This report includes client level contact information details on clients with a recent Living Situation of Street Homeless.

Location: ART > Public Folders > HMIS@NCCEH Gallery > "B005 – Unsheltered Contact Information Report"

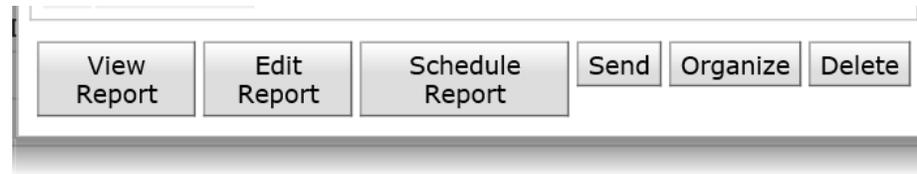# New Report: Unsheltered Contact Information

Summary: This report includes client level contact information details on clients with a recent Living Situation of Street Homeless.

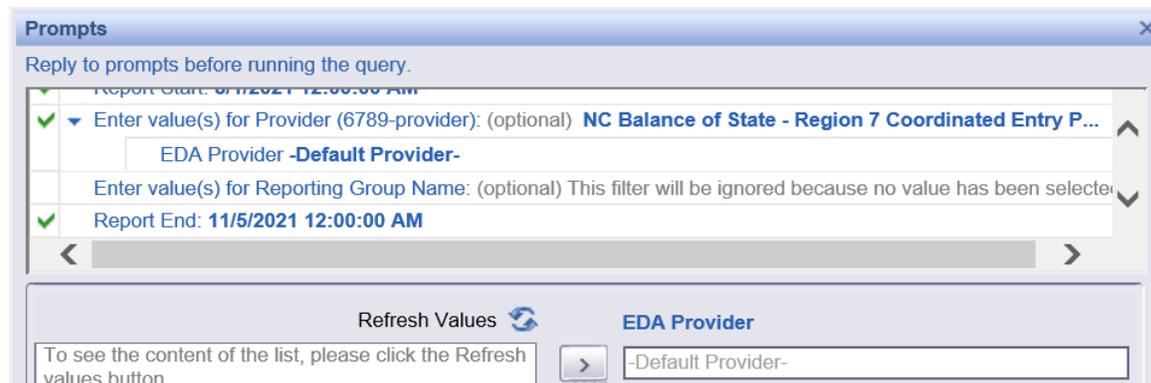*Location*: ART > Public Folders > HMIS@NCCEH Gallery > "B005 – Unsheltered Contact Information Report"

New Report: Unsheltered Contact Information

How to run: Click the magnifying glass – click "View Report" or "Schedule Report".

| View Report | Edit Report | Schedule Report | Send | Organize | Delete |

Prompts: Users will specify EDA Provider, Reporting Start Date and Reporting End Date (for Active Window) and optionally, Provider or Reporting Group Name (likely 2022 PIT Reporting Group)

Prompts

Reply to prompts before running the query.

~~Report Start: 8/1/2021 12:00:00 AM~~

✓ ▼ Enter value(s) for Provider (6789-provider): (optional) **NC Balance of State - Region 7 Coordinated Entry P...**

   EDA Provider **-Default Provider-**

   Enter value(s) for Reporting Group Name: (optional) This filter will be ignored because no value has been selecte

✓ Report End: **11/5/2021 12:00:00 AM**

Refresh Values 🔄   **EDA Provider**

To see the content of the list, please click the Refresh values button.   [>]   -Default Provider-

New Report: Unsheltered Contact Information

How does this report pull data?

- The report pulls data based on Current Living Situation updates.

- Clients must have a Current Living Situation update (CLS 4.12) with the specified Reporting Group of projects in the prompt to be included on the report.

- The report filters this data for Head of Household = Self and Most recent CLS = Unsheltered and then returns contact information for those clients only.

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New Report: Unsheltered Contact Information

What's the format?

The **Alpha Contacts Tab** includes the detailed contact information for valid clients only. The criteria for inclusion are Head of Household = Self and Most recent CLS = Unsheltered. There is a client count footer on the bottom of the table.

The **Additional Details Tabs** are for Report Troubleshooting. This tab does not contain any client data, however, the full data set for the query is counted on this tab to understand total clients in the query, total clients with unsheltered CLS.

Please note: This report contains PII. Data extractions from HMIS must follow file storage protocol. Please password protect or otherwise secure this file.

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Client ID	Last Name	First Name	Contact Info Date Added	Primary Phone Number	Secondary Phone Number	Email Address	Social Media Handle or Website
1020140	********	********	8/6/2021	xxx-xxx-xxxx			
1026205	********	********	11/19/2021	xxx-xxx-xxxx		email@email.com	
1020896	********	********	6/25/2021	xxx-xxx-xxxx			
1015436	********	********	1/29/2021	xxx-xxx-xxxx			
1015436	********	********	1/29/2021	xxx-xxx-xxxx			
1015436	********	********	10/25/2021	xxx-xxx-xxxx		email@email.com	
1017859	********	********	4/9/2021	xxx-xxx-xxxx			
1017859	********	********	6/28/2021	xxx-xxx-xxxx	xxx-xxx-xxxx	email@email.com	
1022812	********	********	8/12/2021	xxx-xxx-xxxx			
1022836	********	********	8/12/2021	xxx-xxx-xxxx			
1024549	********	********	9/29/2021	xxx-xxx-xxxx		email@email.com	
1024623	********	********	10/1/2021	xxx-xxx-xxxx		email@email.com	
1007251	********	********	11/8/2019	xxx-xxx-xxxx			
1007251	********	********	1/17/2021	xxx-xxx-xxxx		email@email.com	
1025851	********	********	11/10/2021	xxx-xxx-xxxx		email@email.com	
1019460	********	********	5/24/2021	xxx-xxx-xxxx			
1015966	********	********	2/11/2021	xxx-xxx-xxxx			
1015966	********	********	3/18/2021	xxx-xxx-xxxx		email@email.com	
1015162	********	********	1/24/2021	xxx-xxx-xxxx		email@email.com	

What's Next?

Winter Beds

Are there new or changing emergency beds in your community?

How will data be collected and entered?

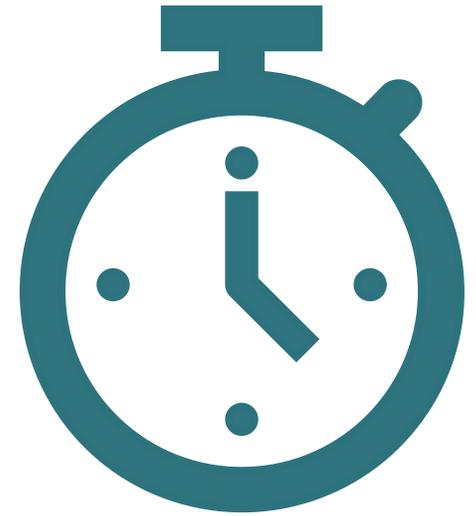Does HMIS need to separate beds for outcomes?
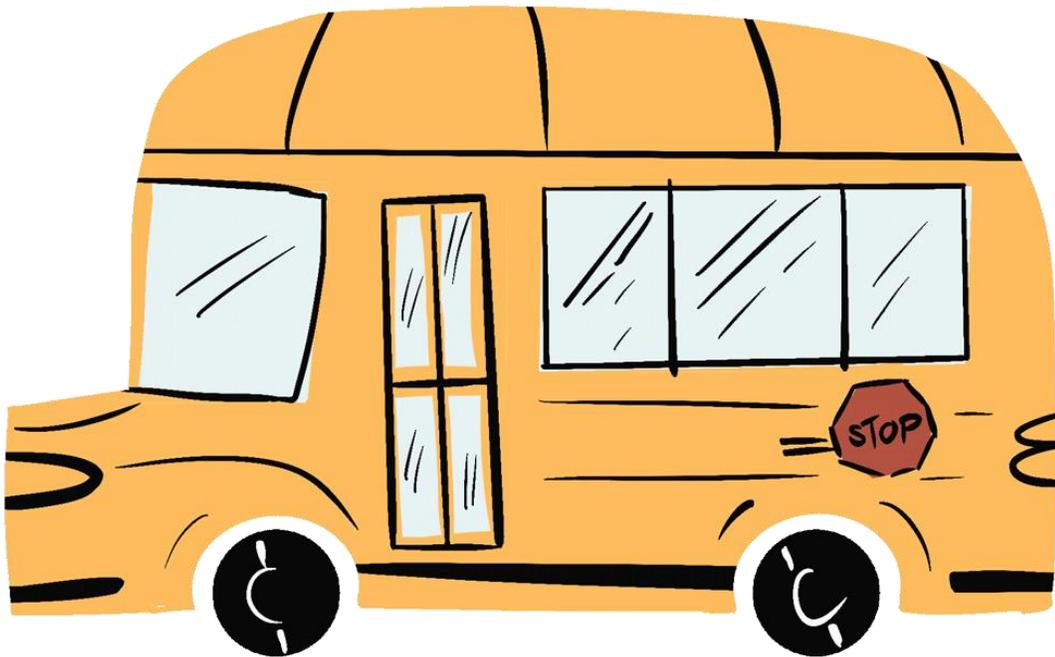
What funding is being used?

Winter Beds

Consider how long beds will be in operation

❑ Continuously for months

❑ Ad hoc basis as temperatures drop

❑ Until pandemic is over

❑ Forever and always

Learning Management System (LMS)

New Training System is here!

- Bookmark: **https://www.icatraining.org/**

- Will allow better tracking for new user and annual requirements

- Will expand capacity for recorded trainings (update & create new ones)

- Will launch new user trainings later in 2022

First up:

- Start Here orientation

- Annual Privacy Training

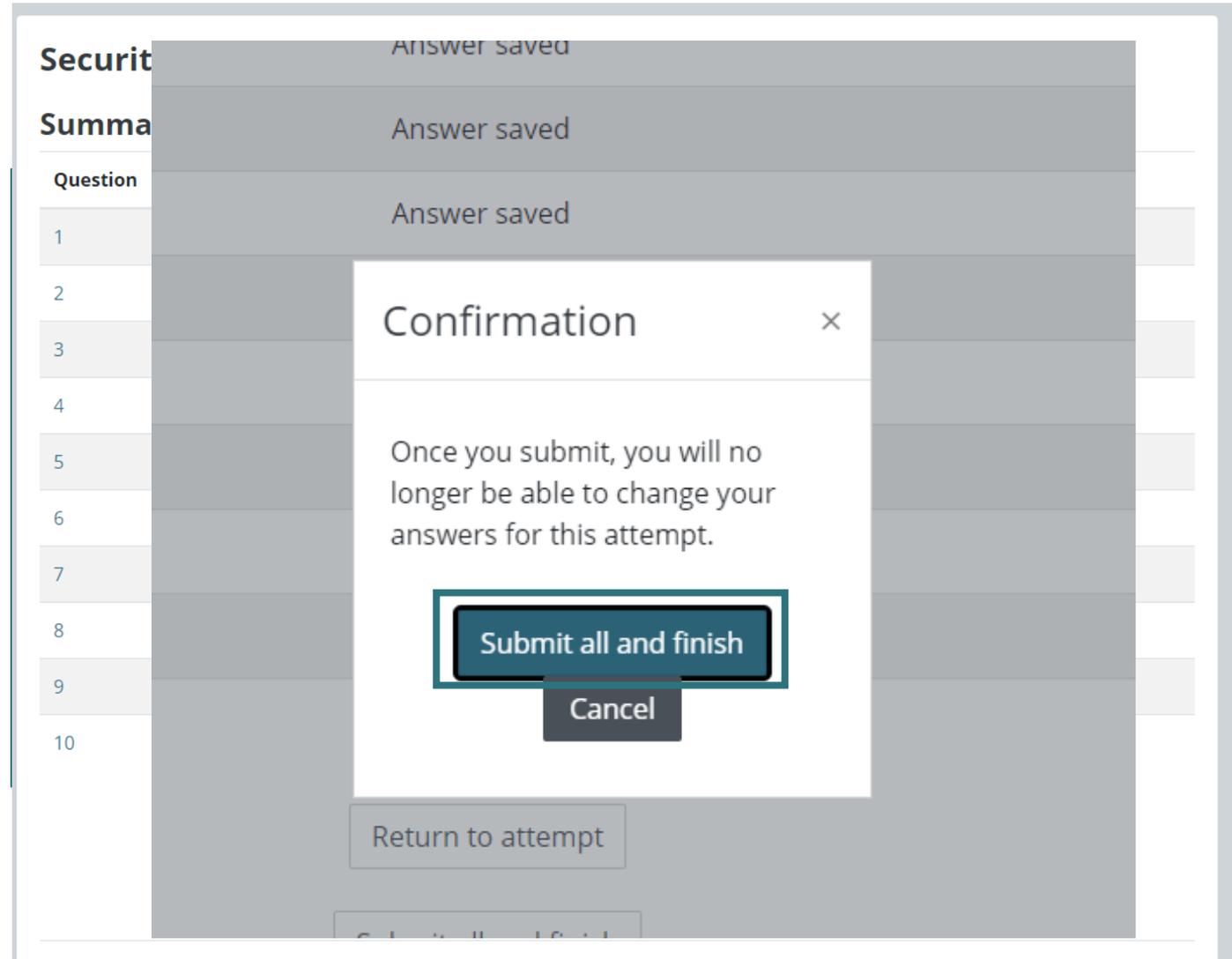- New 2022 Data Standards (introduced in Sept)

Deadline January 7th

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Learning Management System (LMS)

Complete the Quizzes
It's as easy as 1, 2, 3!

- Click Finish Attempt
- Click Submit All and Finish
- Click Submit All and Finish x2

What's Next Calendar

Due	Report/Event Name
Nov 12th	Deadline: Agency Corrections for HUD Reporting
November - December	Agency HMIS Check-Ins (required)
December 15th	Street Outreach Training (ESG funded)
December – January 7th	Annual Privacy and New Data Standards quizzes
Jan 20th	BoS CoC HMIS Users Meeting
Jan 26th	Point in Time Night
February	PIT/HIC reports will be due – stay tuned!

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Contact NCCEH

hello@ncceh.org

919.755.4393

Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997

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Questions?

Let's Troubleshoot!