Durham HMIS Users Meeting

January 2022

NC COALITION to end HOMELESSNESS

Agenda

January 2022

System Updates

- COLA and how to change Income
- Federal Reporting Season
  - Agency Check-ins
  - PIT/HIC

How Can We Help?

- How to use Durham's HMIS Sharing
  - Upload File Attachments
  - Manage History Color Bar
  - Track Case Managers

What's Next

- HMIS Calendar

Demo/Troubleshooting

NCCEH

System Updates

Income Changes in HMIS

Training and Guides Available

- Training video
- Step by Step Guide

Social Security Administration Cost of Living Adjustments (COLA):

- Social Security Income gets a lift!
- 5.9% increase effective January 2022
- More details

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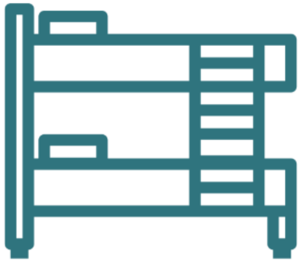
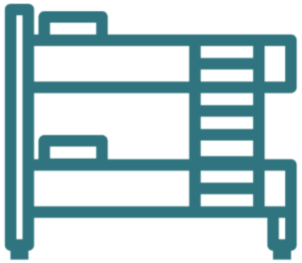
Data Collection for Point-in-Time Count



Unsheltered	Sheltered Count	
	HMIS ES + TH	Non-HMIS ES + TH
Not in HMIS	**HMIS Reports**	**Not in HMIS**
Night of Count: Jan 26 Service Based Counts: Jan 26-Feb 2	Work with NCCEH Data Center to finalize data and submit reports	Night of Count: Jan 26 Service Based Counts: Jan 26-Feb 2

Data Collection for Housing Inventory Count



<table>
<tr><th colspan="2">Temporary Sheltered</th><th colspan="2">Permanent Housing</th></tr>
<tr><td>HMIS
ES + TH</td><td>Non-HMIS
ES + TH</td><td>HMIS
RRH + PSH + OPH</td><td>Non-HMIS
RRH + PSH + OPH</td></tr>
<tr><td rowspan="2">HMIS Reports:
Work with NCCEH Data Center to finalize data and submit reports</td><td>People Count:
(Due early Feb)</td><td rowspan="2">HMIS Reports:
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<tr><td>Bed + Unit survey
with NCCEH staff
(Due early Feb)</td><td>Bed + Unit survey
with NCCEH staff
(Due early Feb)</td></tr>
</table>

Combining Data & Reporting

NCCEH Staff will combine data and create reports.

Data Collected	Type	Contributes to Point in Time Count (PIT)	Contributes to Housing Inventory Count (HIC)
People	Unsheltered	✓	
	Sheltered (ES + TH)	✓	✓
	Permanent Housing (RRH + PSH + OPH)		✓
Beds + Units	Sheltered (ES + TH)		✓
	Permanent Housing (RRH + PSH + OPH)		✓

HMIS PIT/HIC Role

ES, TH, RRH, PSH Program staff

- Submit reports to NCCEH with client, program, funding, bed/unit, and capacity information by February 4th
  1. Data Center staff will run initial reports for AAs
  2. Then Agency will review, correct data, and submit reports
  3. **Agency Admins - Reserve time now for the week after PIT to review your reports!

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How Can We Help?

Community Wide Sharing Basics

What does the sharing look like?

Who is included in this sharing?

- All projects in the CoC that are HMIS participating
- There is additional data sharing between specific project and provider groups as well, that is different from what we are talking about today

What is shared with the whole community?

- Client Profile tab (demographics, contact information, client notes, file attachments)
- Static Entry/Exit information(only program name and dates)
- Case Manager information
- Service Transactions (needs, services, referrals)

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General Rules of the Road

If you can SEE it, you CAN delete it, please be careful and do NOT delete data entered by other agencies!!!

- Just because you CAN do something doesn't mean you SHOULD do it!
- If you see something that does not line up or is a conflict DO NOT delete it
  - contact the agency and follow the community sharing plan and agreement process.
- DO NOT include specially protected information (like SSN, MH diagnosis) in locations that are shared or in inappropriate locations/ways.
- Review and follow the community agreed upon plan.

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History Color Bar

How to find the History Color Bar

The History Color Bar is available for almost any question you respond to in ServicePoint HMIS.

Not available for:

- questions not in an "assessment" like Client Record questions (section with Name or SSN) and Exit questions (Destination or Reason for Leaving)
- meta-data like Project Start Date or Entry Type
- Other optional features like File Attachments

How to find the History Color Bar

The History Color Bar is available for almost any question you respond to in ServicePoint HMIS.

- Make sure you are in a place to edit a question

You may need to use the pencil icon to get into details

Client Demographics

Date of Birth	11/21/1985
Date of Birth Type	Full DOB Reported (HUD)
Gender	Female
Primary Race	Black or African American (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)

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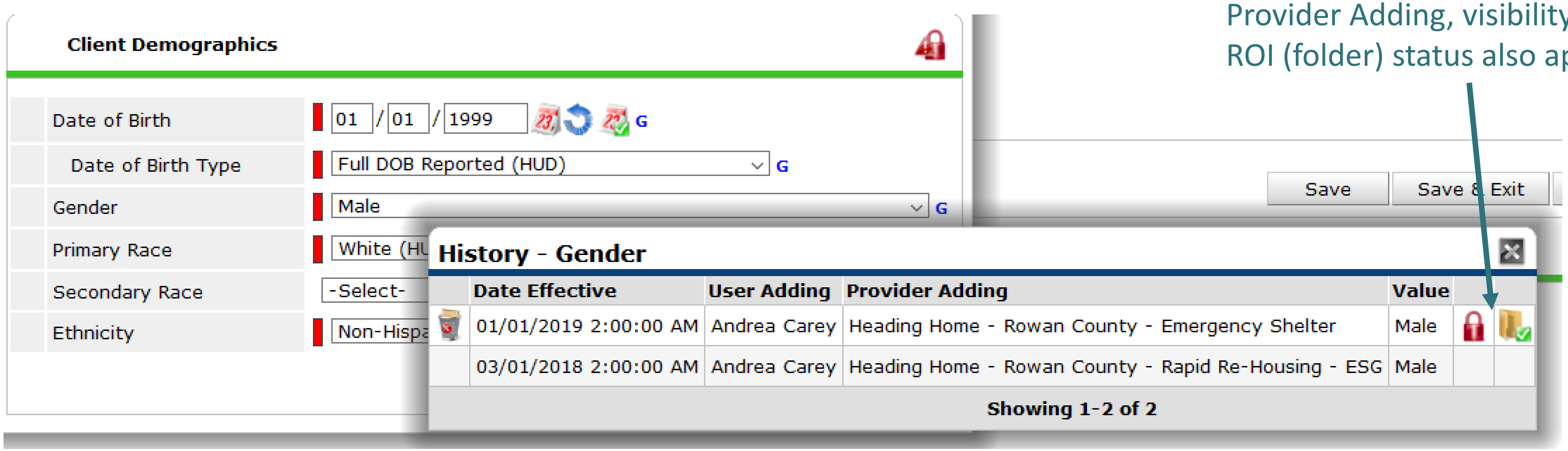
How to find the History Color Bar

Once the History Color Bar is selected, a pop-up appears:

- Review when (Date Effective), who (User Adding), which EDA mode (Provider Adding), and what response (Value)

If your EDA mode matches Provider Adding, visibility (lock) & ROI (folder) status also appear!



When to Use

Use the History Color Bar to review data when:

- Not sure if correct Backdate mode was used
- Not sure of EDA mode used
- Not sure if info was shared
- Not sure who entered the data

Use the History Color Bar to make corrections when:

- Inaccurate response at the time of data entry
- Wrong EDA mode for response
- Confirm the use of Verify and Save Button

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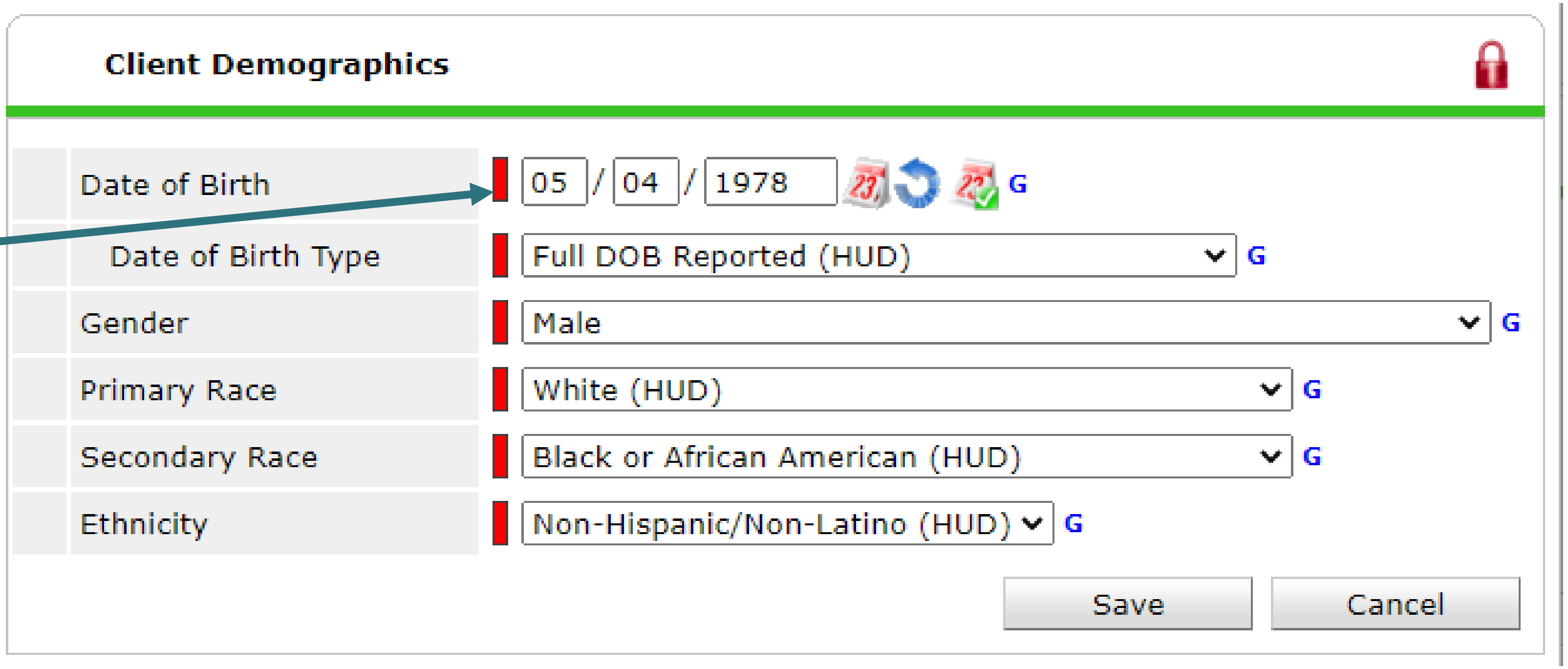
How to Make Corrections

Select the History Color Bar to see previous responses

First find the color bar!



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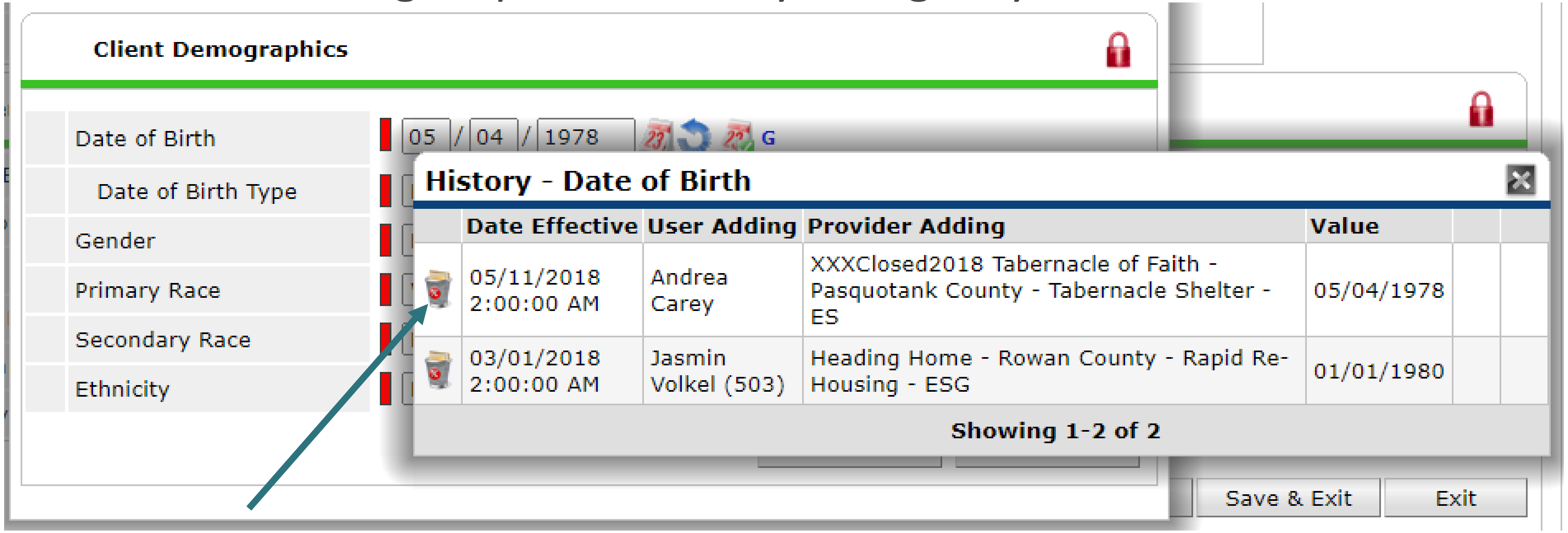
How to Make Corrections

Once the History Color Bar is selected, a pop-up appears:

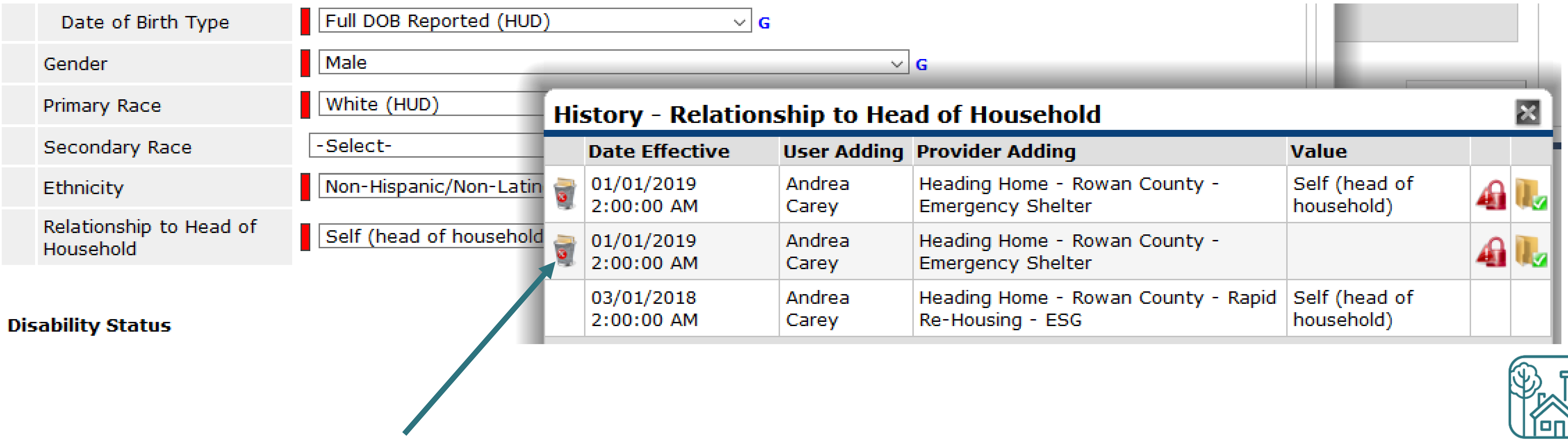
- Use the Trash Bin icon to remove wrong responses
- ONLY remove wrong responses from your agency



How to Make Corrections

If a response needs a new EDA mode but the same answer

- Clear a response and save to add a blank
- Then add the correct response and remove the blank history



How to Make Corrections

Helps find inconsistencies in client responses:

- For example: Prior Living Situation shows a client has entered ES three times within three years

Homeless History

Prior Living Situation	Place not meant for habitation (HUD) G
Length of Stay in Previous Place	One week
Approximate date homelessness started:	11 / 23
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	One time
Total number of months homeless on the street, in ES or SH in the past three years	2 G

History - Prior Living Situation

Date Effective	User Adding	Provider Adding	Value
12/03/2020 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	Place not meant for habitation (HUD)
09/23/2020 10:38:41 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	Place not meant for habitation (HUD)
03/01/2018 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)

Showing 1-3 of 3

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How to Make Corrections

Helps find inconsistencies in client responses:

- For example: Prior Living Situation shows a client has entered ES three times within three years
- However, the Number of Times and Number of Months question hasn't changed!

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	One time (HUD) G
Total number of months homeless on the street, in ES or SH in the past three years	2

Income & Sources

History - 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

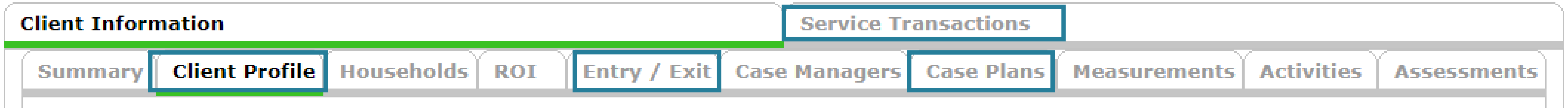
Date Effective	User Adding	Provider Adding	Value
09/23/2020 12:03:19 PM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	One time (HUD)
03/01/2018 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	One time (HUD)

Showing 1-2 of 2

Client Notes

Notes in HMIS

There is some version of Notes in multiple locations in HMIS



4 locations

- Client Profile tab (called Client Notes)
- Case Plans (called Case Notes)
- Services and Referrals
- Exits

Only Client Notes in the Client Profile tab and notes in Service Transactions tab will be visible between agencies

Use a Standard Format

- No matter which notes location you are using, make the format consistent so colleagues can use the valuable information collected in the future.
  - New notes will go above the previous notes
  - The first row of the note will be the Date and Time
  - The second row will be the note details and your initials

01.01.2022 12:00 pm
This is an example of a note. AZ

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What to include in a Client Note?

Consider this: If you were no longer working with the client or out of the office, what would your colleague need to continue supporting the client?

Helpful categories

- Notes on the client/household
    - Background and context
    - Goals and motivations
    - Challenges and obstacles
- Notes on the case worker
    - Action steps taken
    - Attempts to resolve a crisis, connect to services, pursue a goal
- Status of the housing crisis at the end of each interaction

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Client Notes in *Client Profile* tab

Steps to Add a Client Note

1. Once logged into HMIS, confirm Enter Data As (EDA) for the client's project.
2. Go to *ClientPoint* to begin searching for the Head of Household.
3. Scroll to the *Client Notes* and select *Add New Client Note* to record a new note.

Client Notes

		Provider	Note Date	Note Preview	Full Note
		North Carolina Coalition to End Homelessness	04/02/2020	Main Street Hotel: 1234 Main Street, Du...	
Add New Client Note	Print			Showing 1-1 of 1	

File Attachments

			Date Added	Name	Description	Type	Provider	Added From	
			01/21/2021	print ROI test.pdf	test!	pdf	NC-502 Durham	ROI	
Add New File Attachment					Showing 1-1 of 1				

*This is where Entry Point staff to record Diversion conversation notes.

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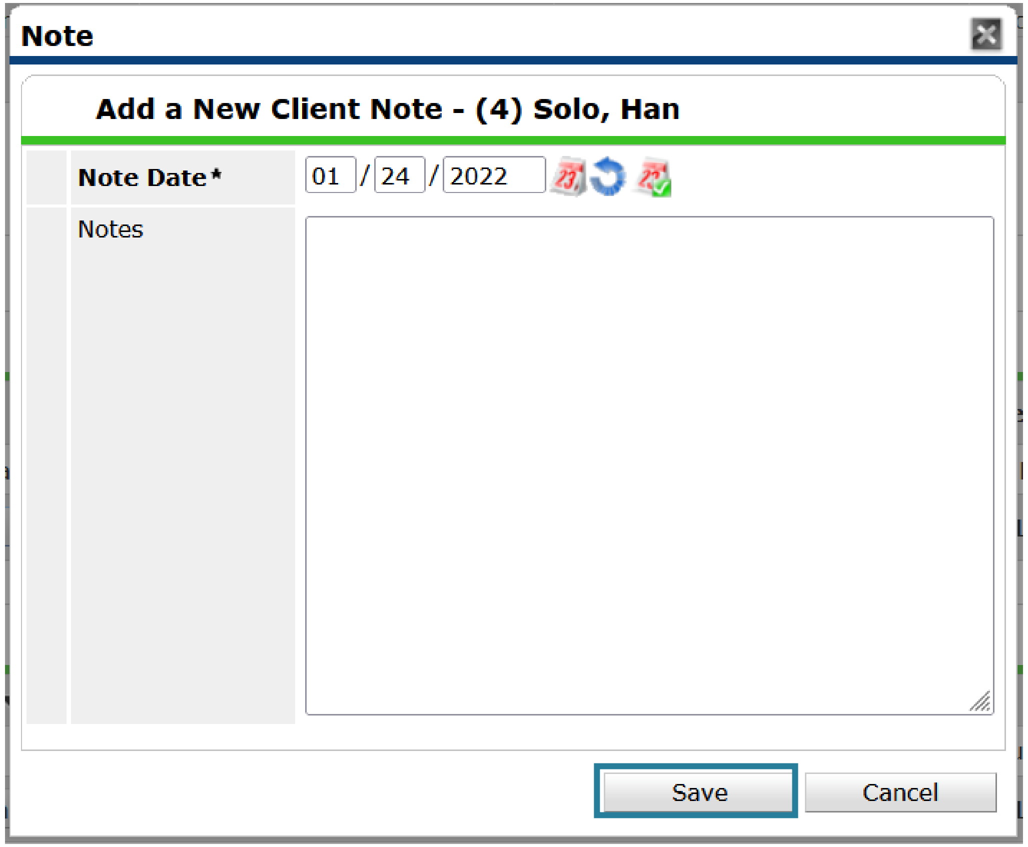
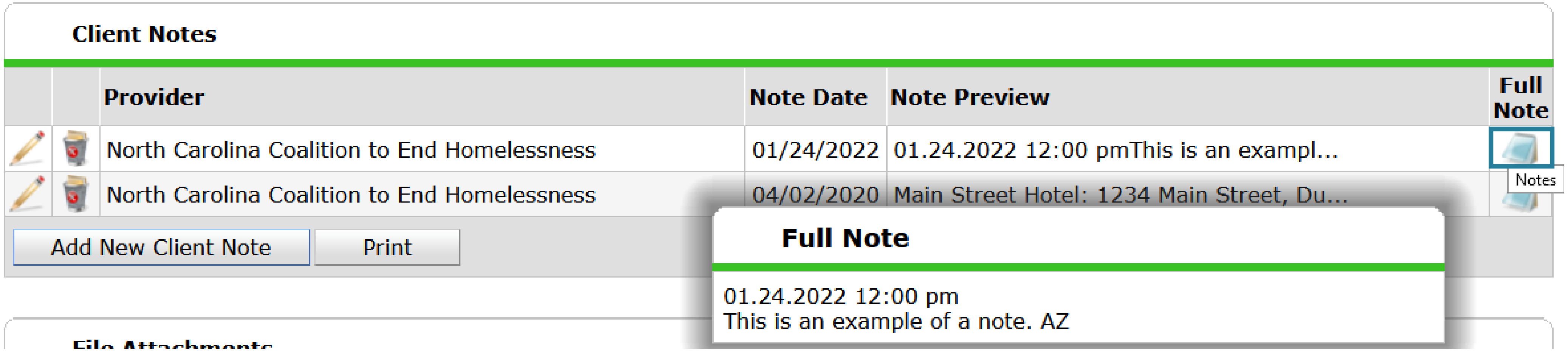
Client Notes in *Client Profile* tab

- Confirm the *Note Date* is accurate.
- Type in your notes using the standard format.
- End the note with your initials.
- Click *Save*



Client Notes in *Client Profile* tab

- Hover over the *Full Note* icon for a view of the complete note.



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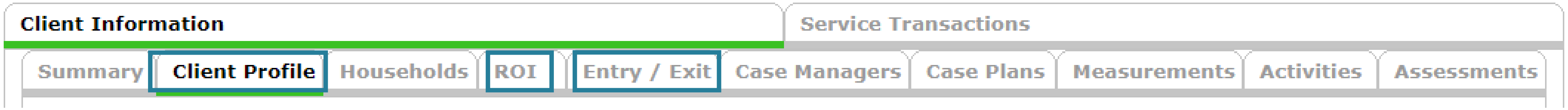
File Attachments

Client File Attachments

Can be added to the client profile on ROI, Entry/Exit, and Service Transactions tabs



Security

May be included in sharing between agencies

Recommendation that any medical documents are not attached (greater liability)

Best Practice: get verbal permission from client to upload

What do you add to physical client files? What do you want to add?

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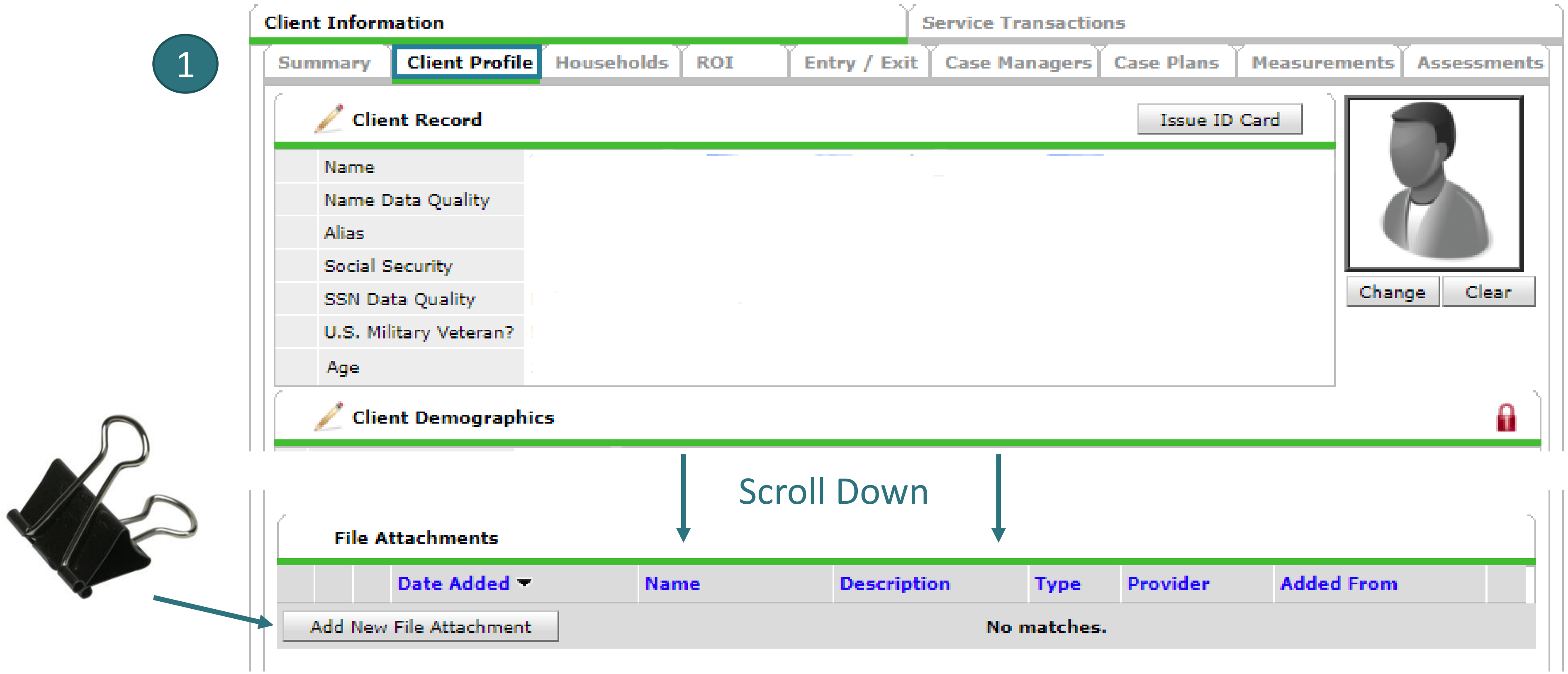
Where to upload Client File Attachments

There are three locations, depending on an agency's preference



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Where to upload Client File Attachments

2

Client Information | Service Transactions

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

Release of Information

		Provider	Permission	Start Date	End Date	
		Passage Home - Wake County - Essential Services/Case Management - HUD	Yes	01/08/2017	01/08/2018	

Add Release of Information

Showing 1-1 of 1

3

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	
	Passage Home - Wake County - Essential Services/Case Management - HUD (5688)	HUD		01/08/2017					3	

Add Entry / Exit

Showing 1-1 of 1

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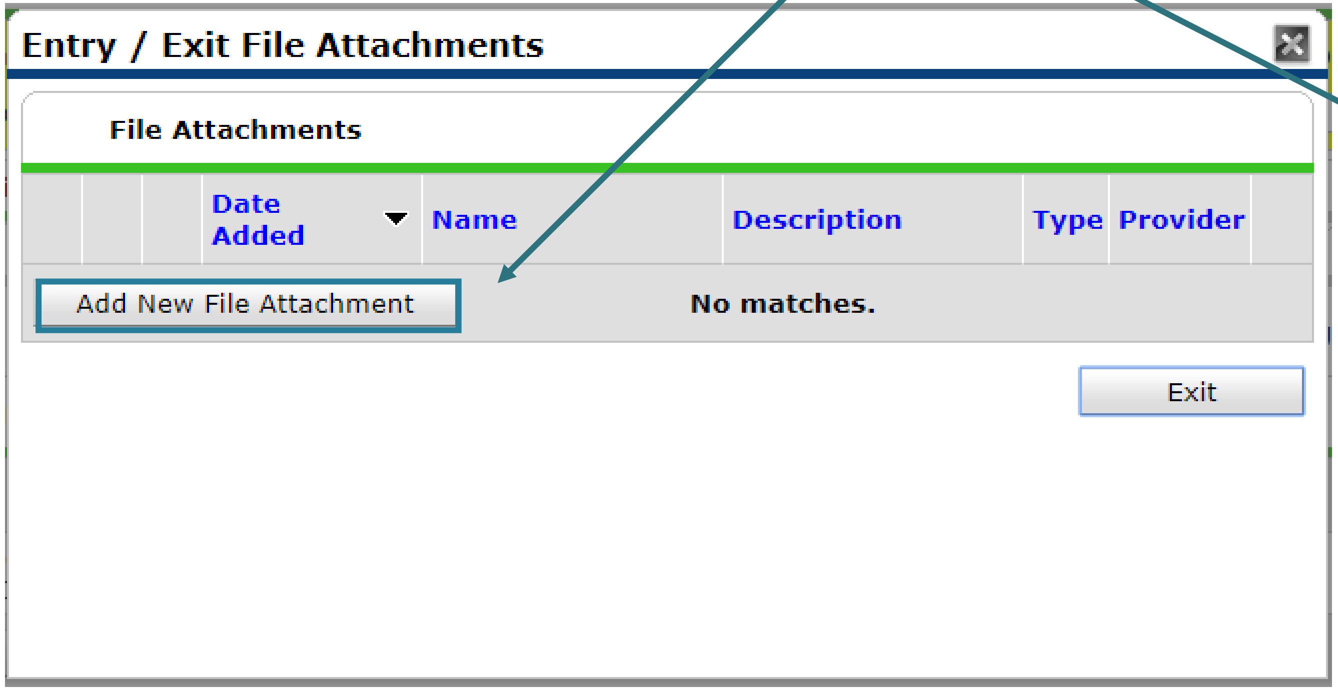
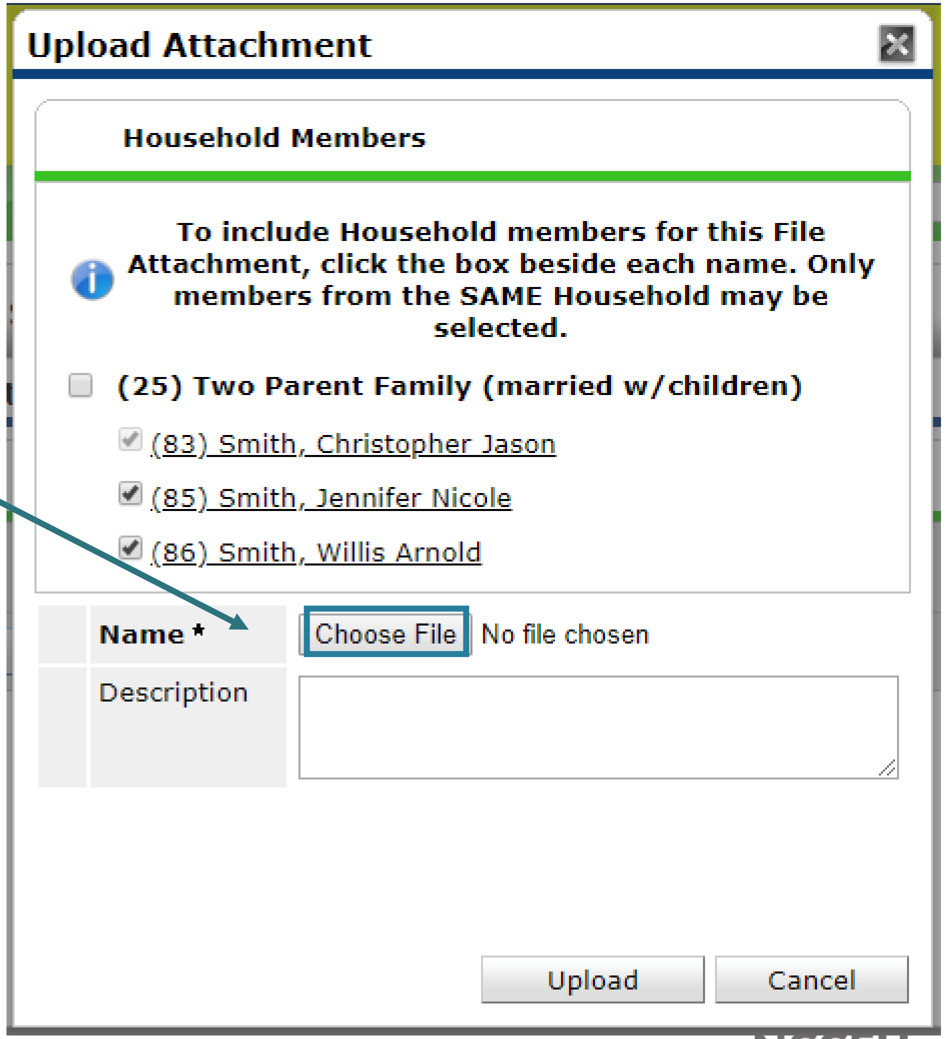
How to attach Client File Attachments

Add New File Attachment
and select your file to upload





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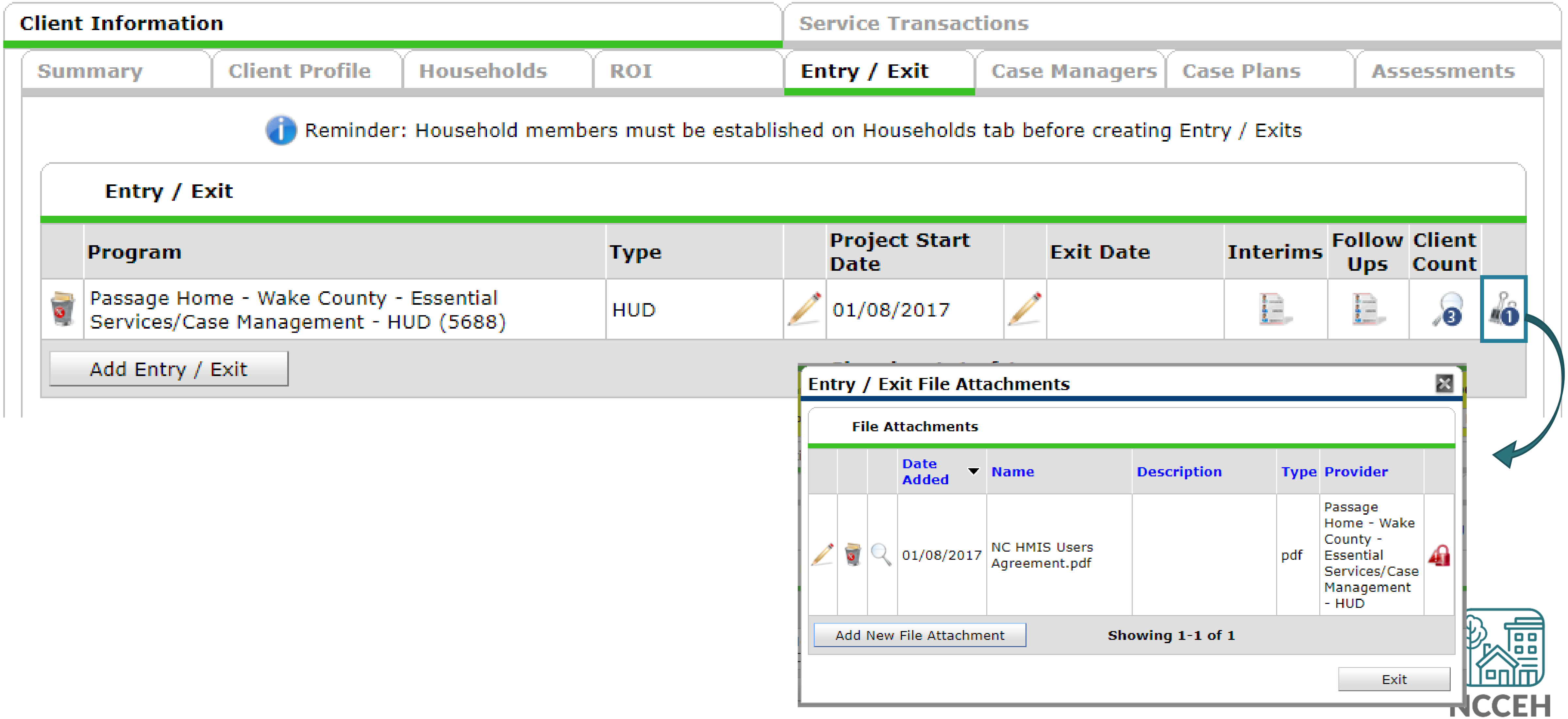
It’s Saved!


Client Information
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Passage Home - Wake County - Essential Services/Case Management - HUD (5688)
HUD
01/08/2017
Add Entry / Exit
Entry / Exit File Attachments
File Attachments
Date Added
Name
Description
Type
Provider
01/08/2017
NC HMIS Users Agreement.pdf
pdf
Passage Home - Wake County - Essential Services/Case Management - HUD
Add New File Attachment
Showing 1-1 of 1
Exit

Track Case Managers

Track who is a client's Case Manager

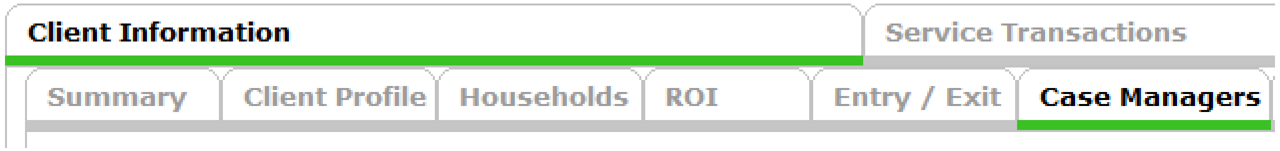
Record client's point person

Save best contact information

See changes over time

Access other ServicePoint features:

- My Client Counts Reports
- Follow-up Lists
- Case Plans/Goals



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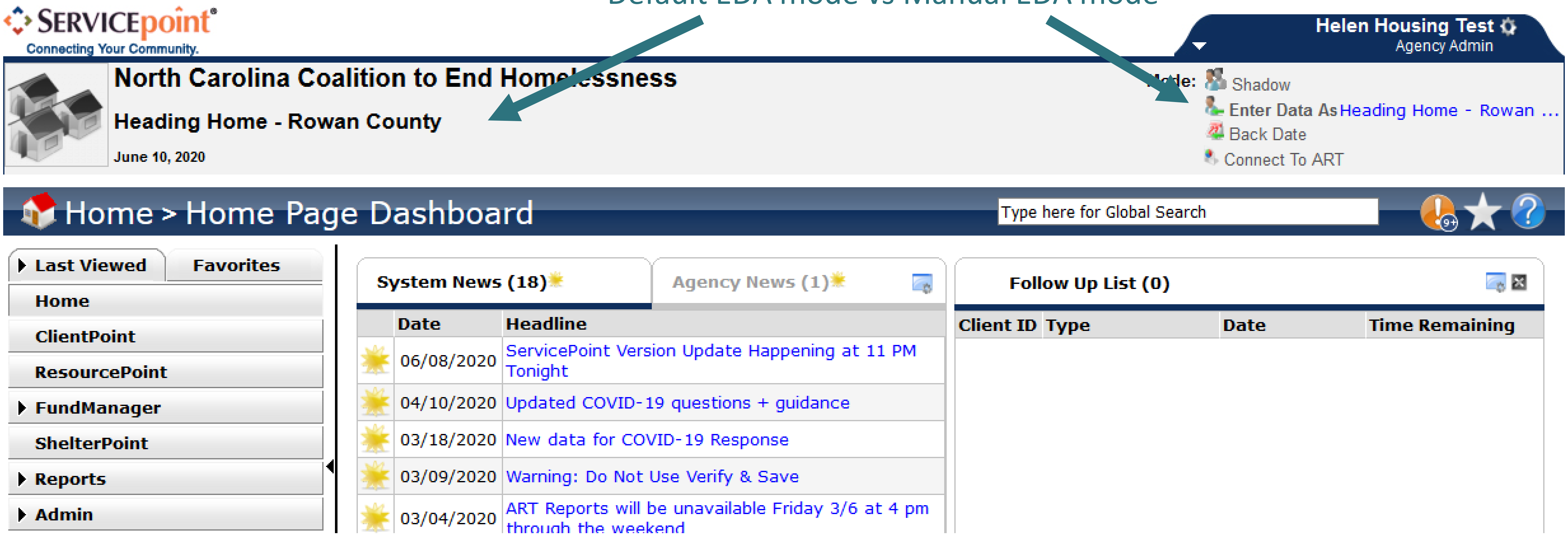
Track who is a client’s Case Manager

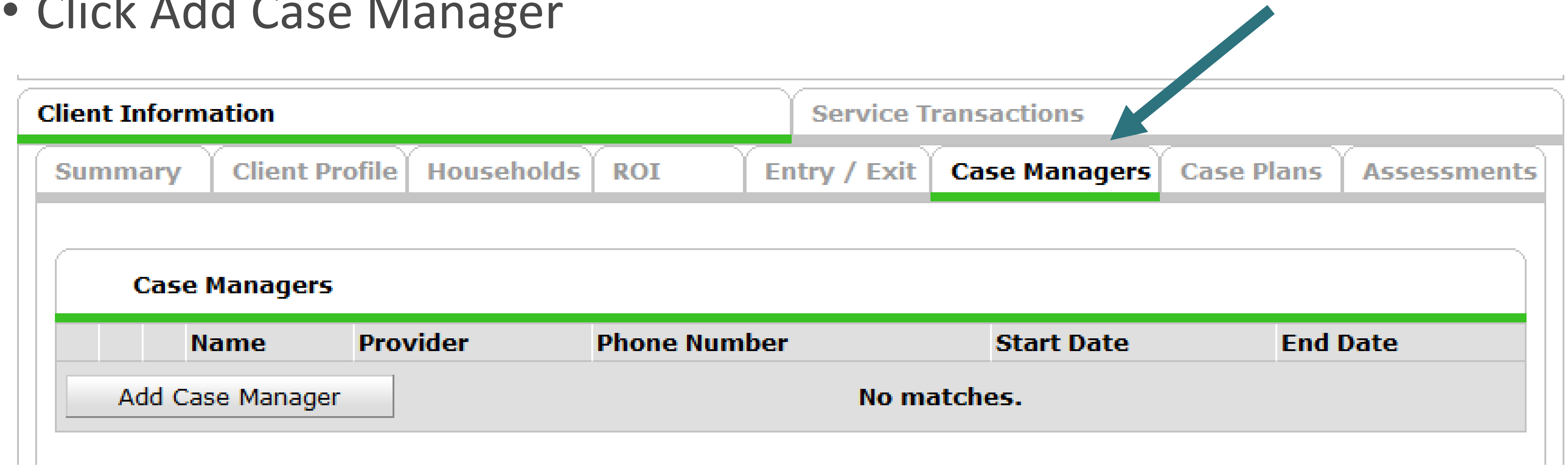
- Enter Data As (EDA) mode matters!

Default EDA mode vs Manual EDA mode



Add a Case Manager

- Go through ClientPoint
- Case Managers is under the Client Information Tab
- Tabs can be adjusted for each project by the Data Center
- Click Add Case Manager



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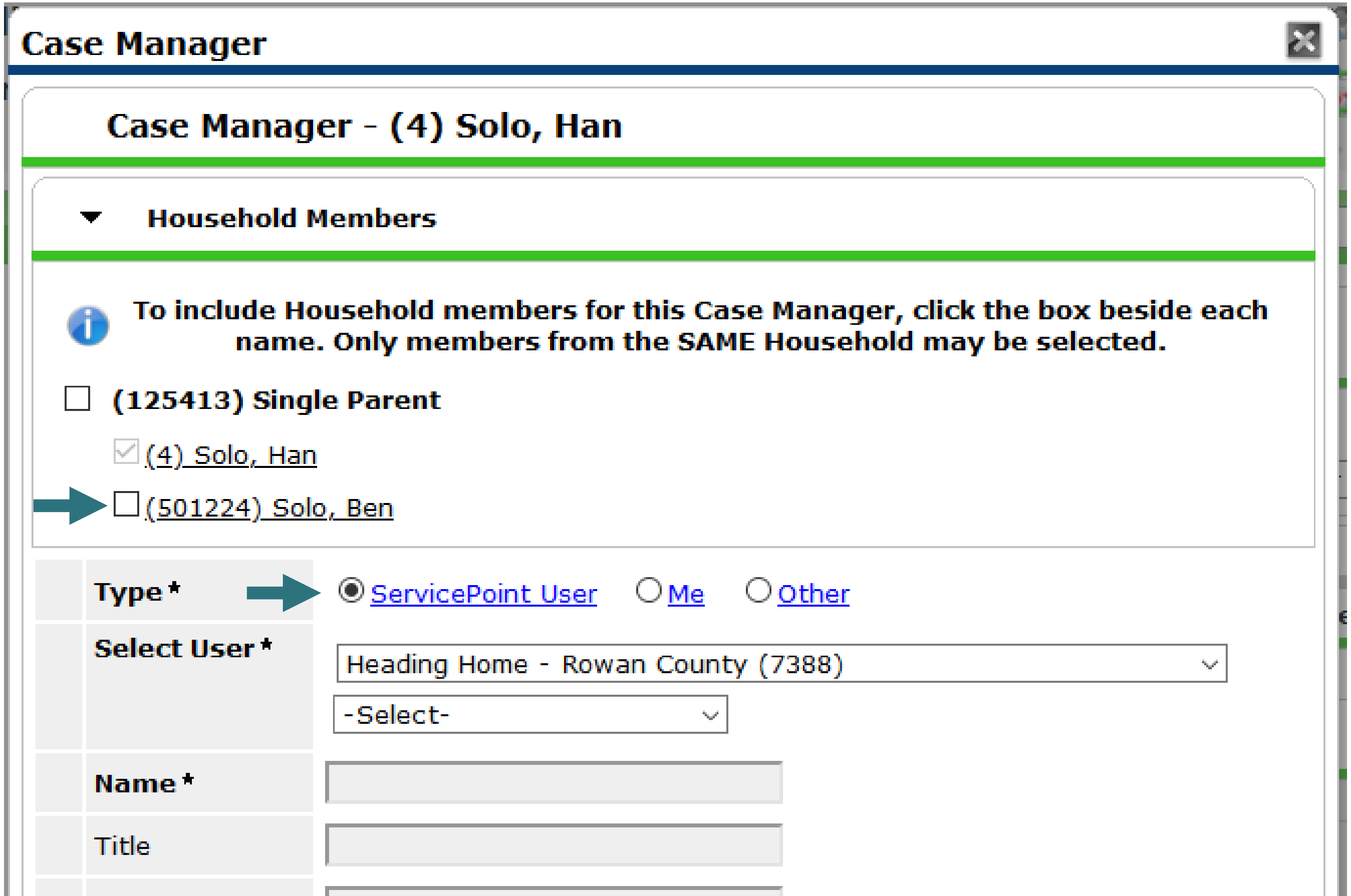
Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?



Add a Case Manager

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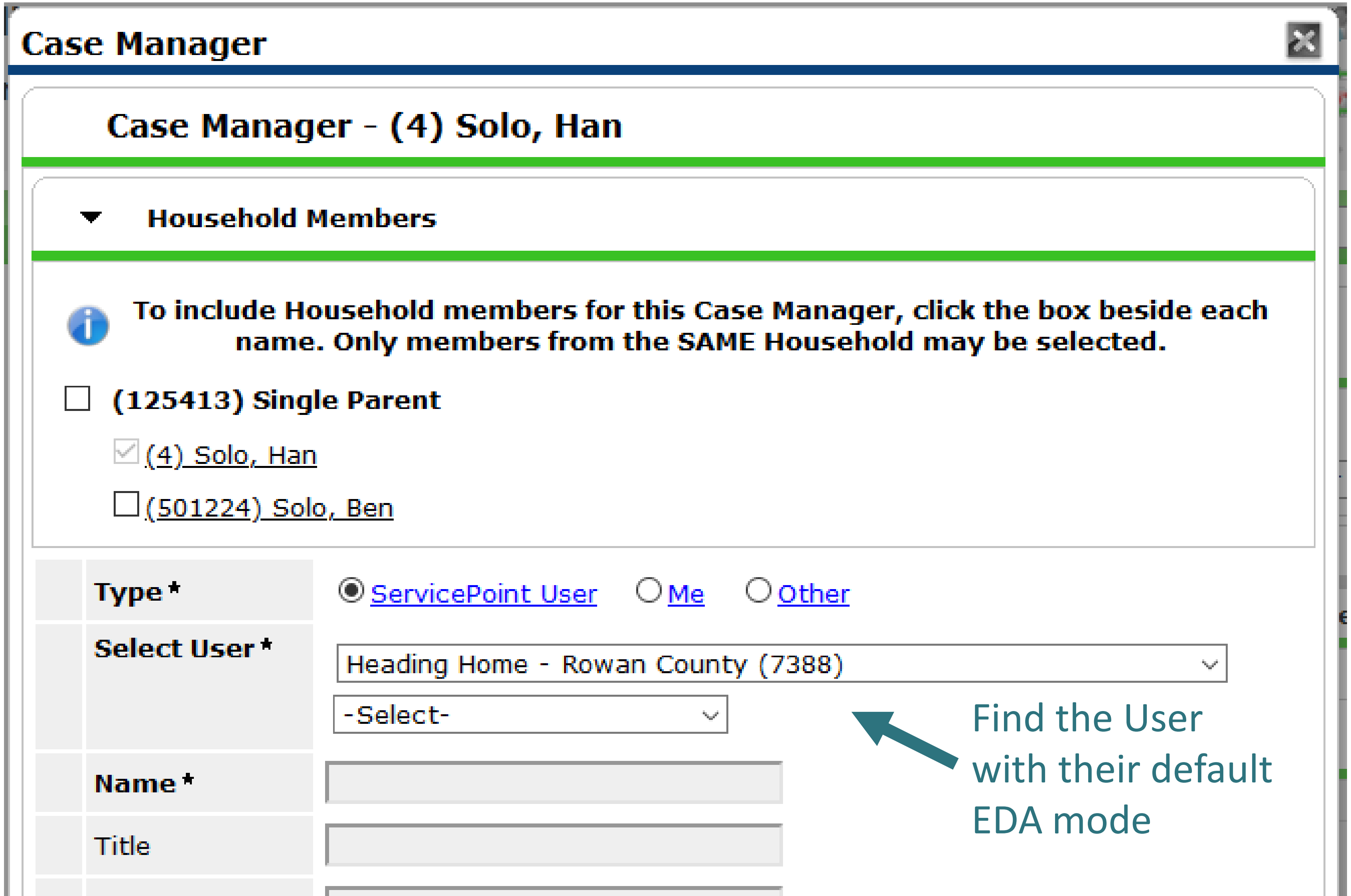
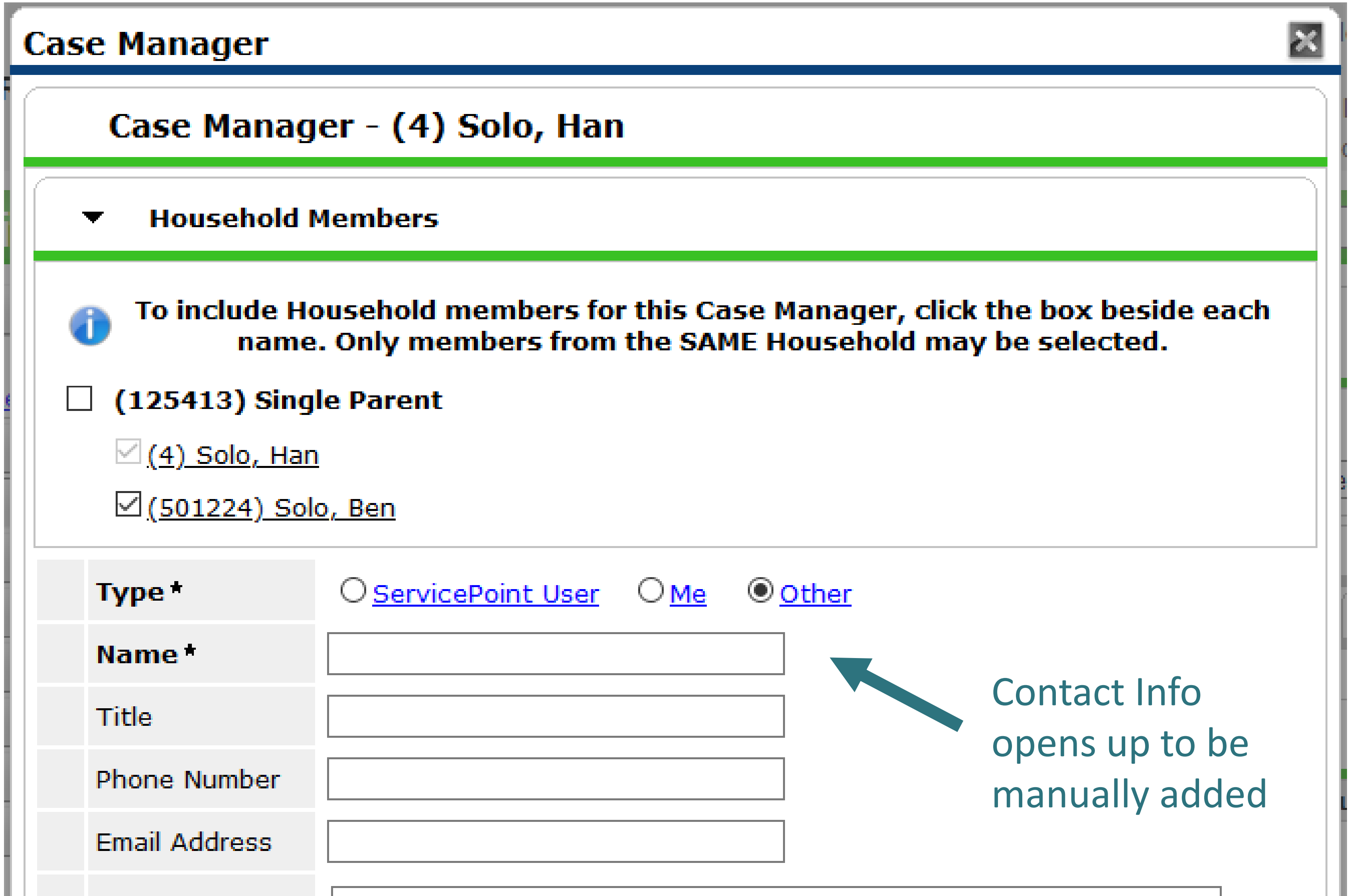


Find the User with their default EDA mode

Add a Case Manager: Other

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?

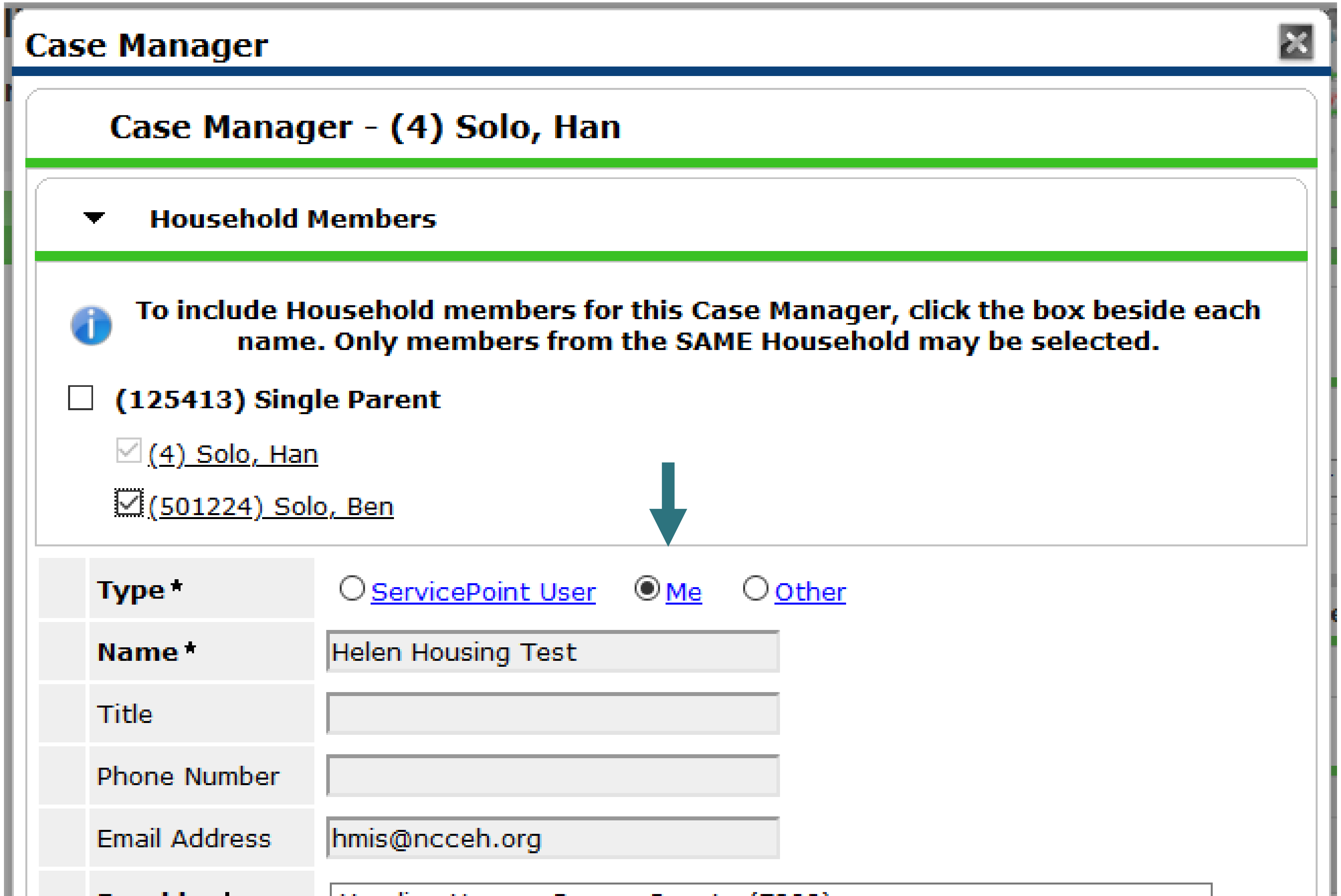


Contact Info opens up to be manually added

Add a Case Manager

Usually, you are selecting yourself!

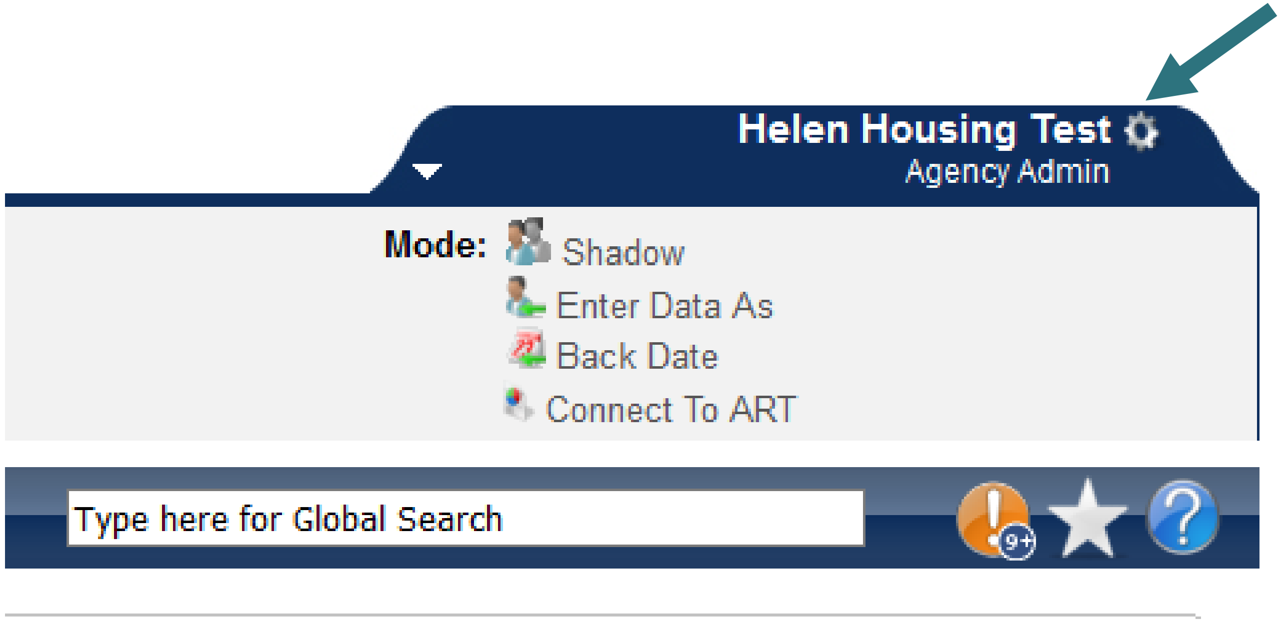
Name & Contact Info automatically appears



How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Find the User Profile Setting icon



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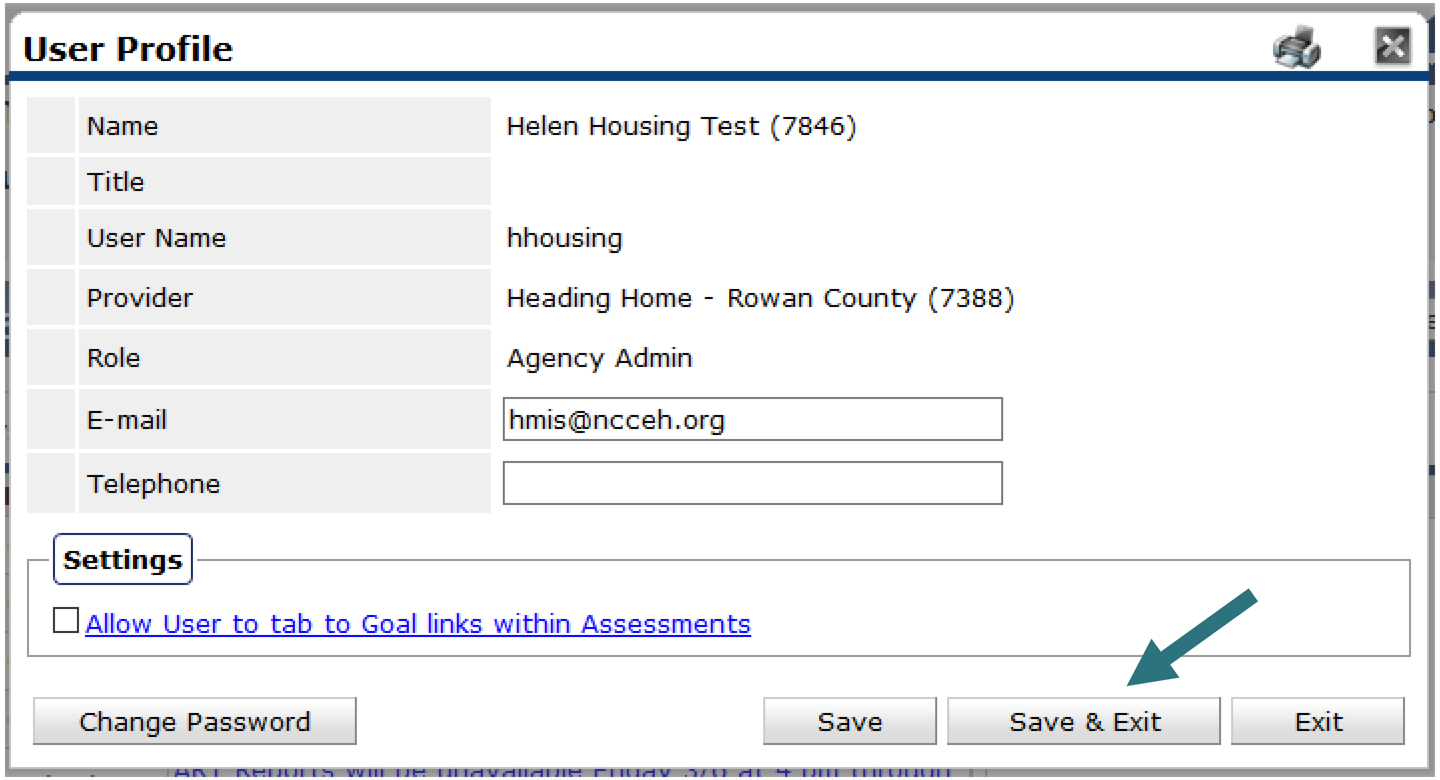
How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Update E-mail and Phone info
- Save & Exit



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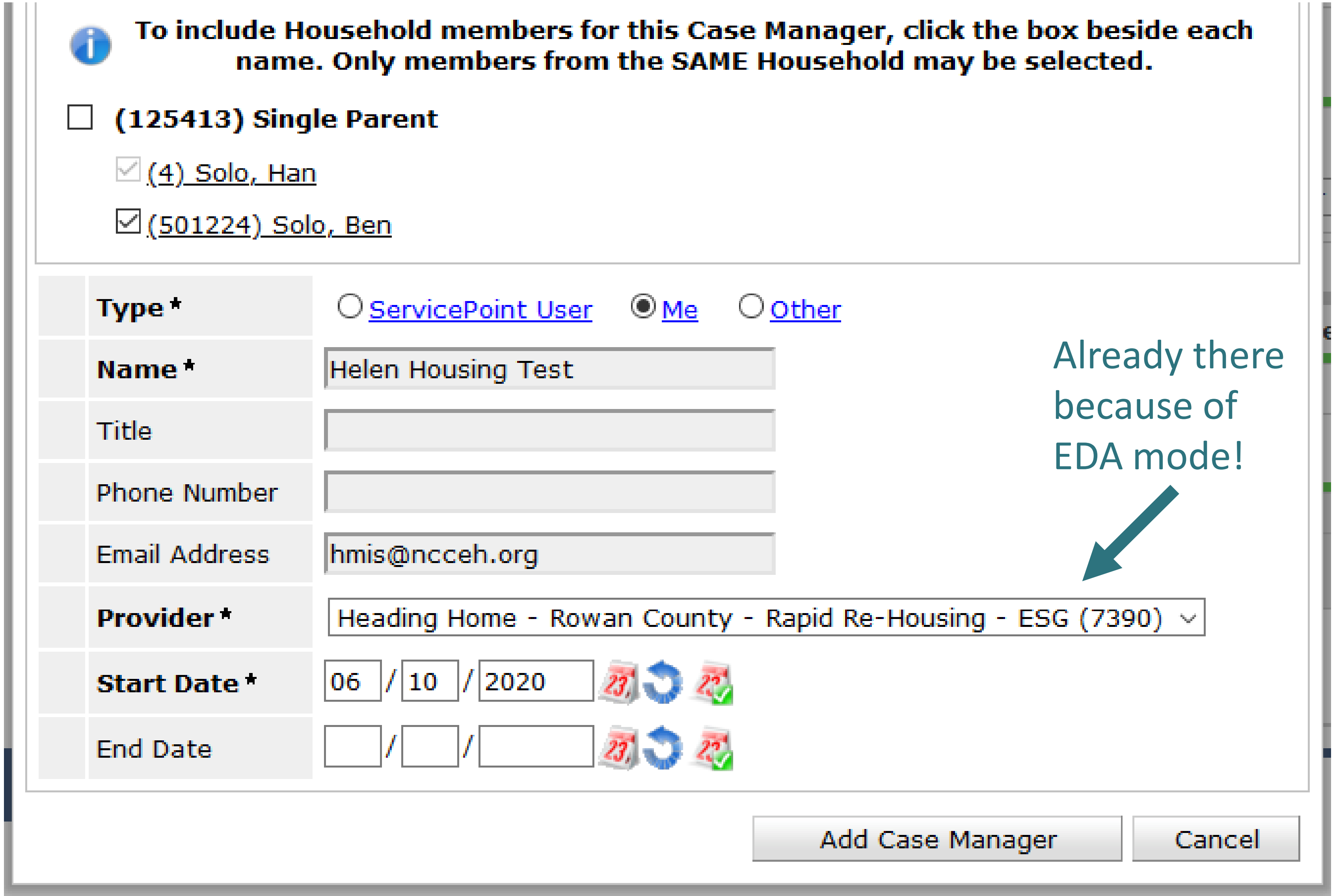
Add a Case Manager

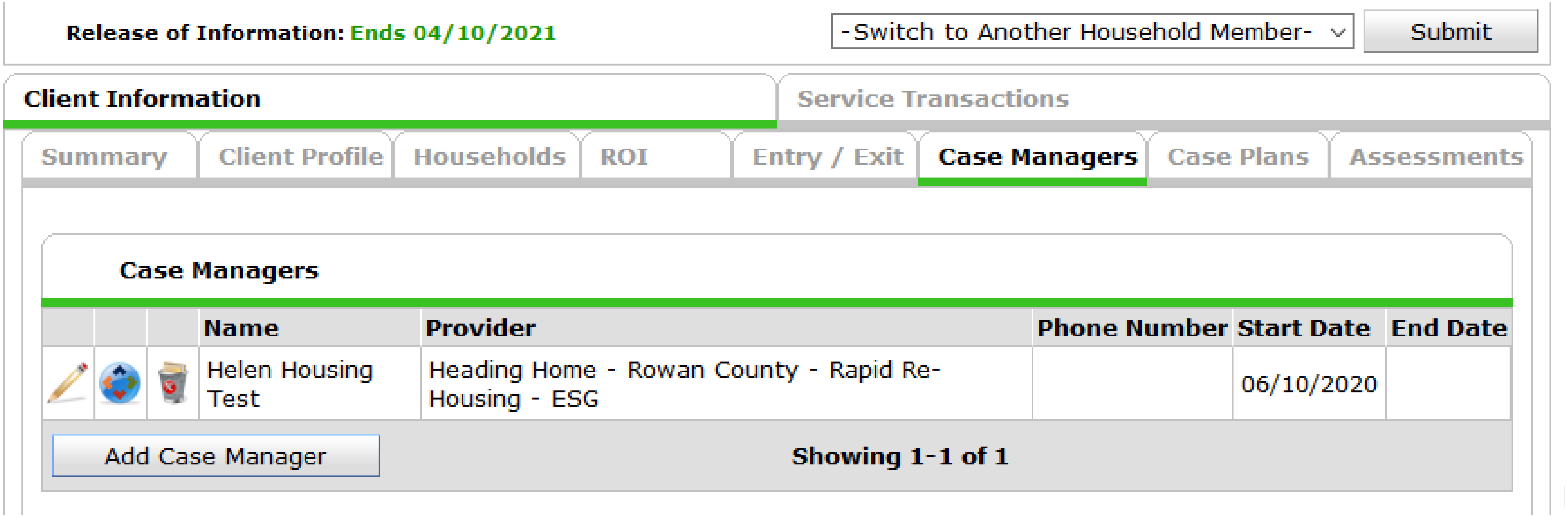
Decision Points:

- Which project does the case manager work on behalf of?
- When did they start working together?



Case Manager Saved!

- Now anyone in my agency or visibility group can see our work together!



What's Next?

What's Next Calendar

Due	Report/Event Name
Jan 26th	Point in Time Night
Jan 28th	HMIS happy hour (new link)
Feb 4th	PIT/HIC reports due
Feb 24th	HMIS Users Meeting (PIT/HIC troubleshooting only)

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NCEndHomelessness
@NCHomelessness
nc_end_homelessness

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!