

Durham HMIS Users Meeting

January 2022



NC COALITION to
HOMELESSNESS end

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

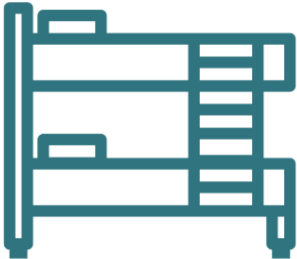
- [Training video](#)
- [Step by Step Guide](#)

Social Security Administration Cost of Living Adjustments (COLA):

- Social Security Income gets a lift!
- 5.9% increase effective January 2022
- [More details](#)



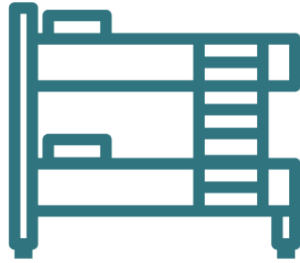
Data Collection for Point-in-Time Count



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



Temporary Sheltered		Permanent Housing	
HMIS ES + TH	Non-HMIS ES + TH	HMIS RRH + PSH + OPH	Non-HMIS RRH + PSH + OPH
HMIS Reports: Work with NCCEH Data Center to finalize data and submit reports	People Count: (Due early Feb)	HMIS Reports: Work with NCCEH Data Center to finalize data and submit reports	People Count: (Due early Feb)
	Bed + Unit survey with NCCEH staff (Due early Feb)		Bed + Unit survey with NCCEH staff (Due early Feb)

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!





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)



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.



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:

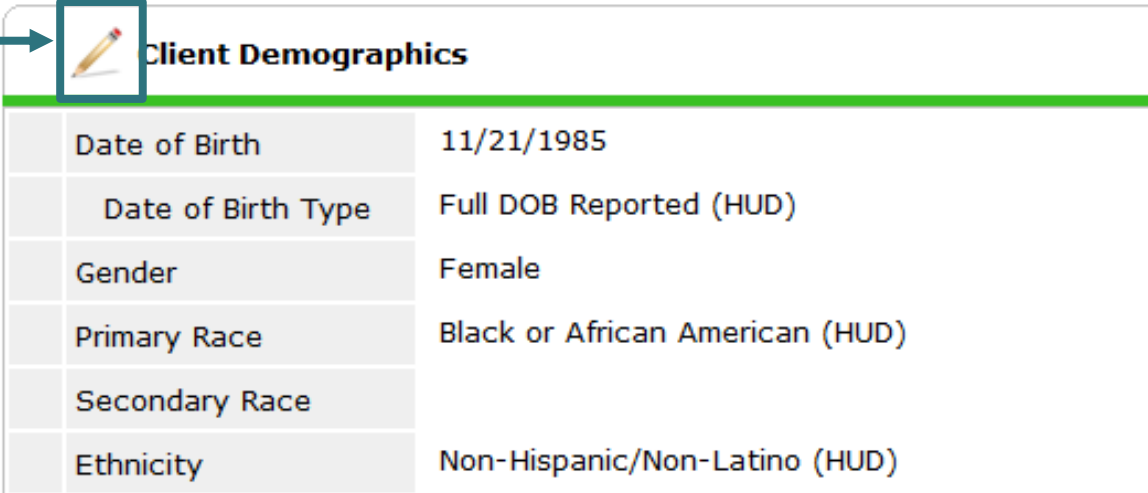
- questions not in an “assessment” like Client Record questions (section with Name or SSN) and Exit questions (Destination or Reason for Leaving)
- meta-data like Project Start Date or Entry Type
- Other optional features like File Attachments

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)



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!

Client Demographics

Date of Birth	01 / 01 / 1999
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	White (HU)
Secondary Race	-Select-
Ethnicity	Non-Hispa

History - Gender

Date Effective	User Adding	Provider Adding	Value
01/01/2019 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	Male
03/01/2018 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Rapid Re-Housing - ESG	Male

Showing 1-2 of 2



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](#)













How to Make Corrections

Select the History Color Bar to see previous responses

First find the color bar!

Client Demographics



Date of Birth	 05 / 04 / 1978    G
Date of Birth Type	 Full DOB Reported (HUD) ▼ G
Gender	 Male ▼ G
Primary Race	 White (HUD) ▼ G
Secondary Race	 Black or African American (HUD) ▼ G
Ethnicity	 Non-Hispanic/Non-Latino (HUD) ▼ G

Save Cancel

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

The screenshot shows a software interface for 'Client Demographics'. The main form has a green header bar and a red lock icon. Below the header, there are several fields: Date of Birth (05 / 04 / 1978), Date of Birth Type, Gender, Primary Race, Secondary Race, and Ethnicity. A pop-up window titled 'History - Date of Birth' is overlaid on the form. The pop-up window has a table with the following data:

Date Effective	User Adding	Provider Adding	Value
05/11/2018 2:00:00 AM	Andrea Carey	XXXClosed2018 Tabernacle of Faith - Pasquotank County - Tabernacle Shelter - ES	05/04/1978
03/01/2018 2:00:00 AM	Jasmin Volkel (503)	Heading Home - Rowan County - Rapid Re-Housing - ESG	01/01/1980

The pop-up window also shows 'Showing 1-2 of 2' and has 'Save & Exit' and 'Exit' buttons. A red trash bin icon is visible next to the first row of the table, and a blue arrow points to it.



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

Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	White (HUD)
Secondary Race	-Select-
Ethnicity	Non-Hispanic/Non-Latin
Relationship to Head of Household	Self (head of household)

Disability Status

History - Relationship to Head of Household

	Date Effective	User Adding	Provider Adding	Value		
	01/01/2019 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter	Self (head of household)		
	01/01/2019 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Emergency Shelter			
	03/01/2018 2:00:00 AM	Andrea Carey	Heading Home - Rowan County - Rapid Re-Housing - ESG	Self (head of household)		

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)

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

	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

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)

Total number of months homeless on the street, in ES or SH in the past three years

2

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

Income & Sources

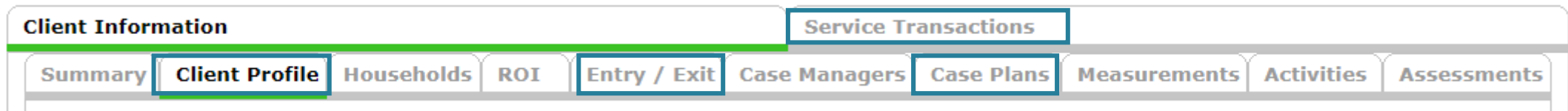




Client Notes

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



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







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.



NCCEH

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*

Note

Add a New Client Note - (4) Solo, Han

Note Date* 01 / 24 / 2022







Notes

Save Cancel

Client Notes in *Client Profile* tab

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

Client Notes

	Provider	Note Date	Note Preview	Full Note
 	North Carolina Coalition to End Homelessness	01/24/2022	01.24.2022 12:00 pmThis is an exampl...	
 	North Carolina Coalition to End Homelessness	04/02/2020	Main Street Hotel: 1234 Main Street, Du...	

Full Note

01.24.2022 12:00 pm
This is an example of a note. AZ

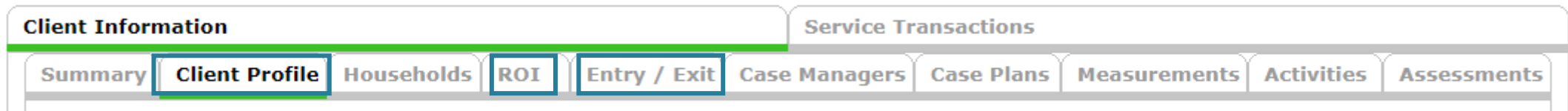
File Attachments



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?



NCCEH

Where to upload Client File Attachments

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

1

The screenshot shows a web application interface for a client profile. The top navigation bar includes 'Client Information' and 'Service Transactions'. Under 'Client Information', the 'Client Profile' tab is selected. The 'Client Record' section contains fields for Name, Name Data Quality, Alias, Social Security, SSN Data Quality, U.S. Military Veteran?, and Age. To the right is a placeholder for a client photo with 'Change' and 'Clear' buttons. Below this is the 'Client Demographics' section, which is locked. Two arrows labeled 'Scroll Down' point from the 'Client Demographics' section to the 'File Attachments' section. The 'File Attachments' section features a table with columns: Date Added, Name, Description, Type, Provider, and Added From. Below the table is an 'Add New File Attachment' button and the text 'No matches.'.

Date Added	Name	Description	Type	Provider	Added From
No matches.					





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



How to attach Client File Attachments

Add New File Attachment
and select your file to upload

Date Added	Name	Description	Type	Provider
No matches.				

Add New File Attachment

Exit

Upload Attachment

Household Members

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

(25) Two Parent Family (married w/children)

(83) Smith, Christopher Jason

(85) Smith, Jennifer Nicole

(86) Smith, Willis Arnold

Name * No file chosen

Description

Upload **Cancel**








It's Saved!

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	Interims	Follow Ups	Client Count
 Passage Home - Wake County - Essential Services/Case Management - HUD (5688)	HUD	 01/08/2017				 3 

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 

Showing 1-1 of 1





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:

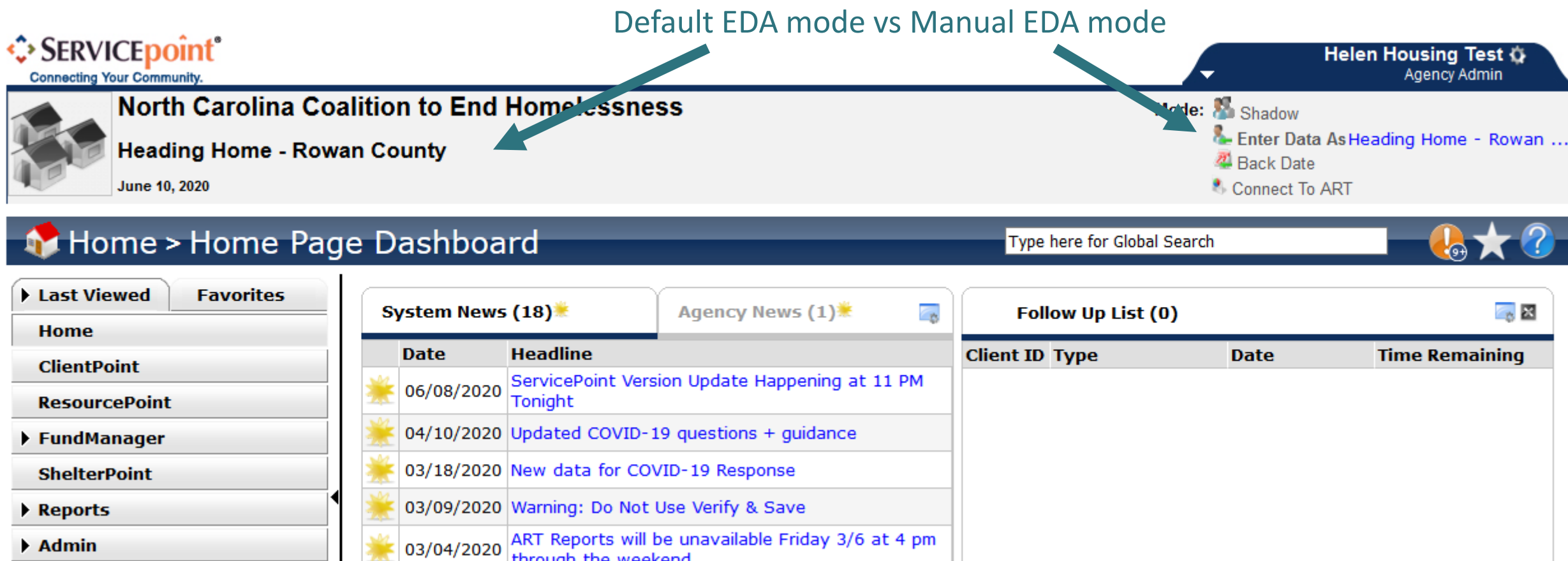
- My Client Counts Reports
- Follow-up Lists
- Case Plans/Goals






Track who is a client's Case Manager

- Enter Data As (EDA) mode matters!

Default EDA mode vs Manual EDA mode











The screenshot shows the ServicePoint interface. At the top left is the ServicePoint logo with the tagline 'Connecting Your Community'. The main header area displays the case title 'North Carolina Coalition to End Homelessness' and subtitle 'Heading Home - Rowan County' with a date of 'June 10, 2020'. On the right, the user is identified as 'Helen Housing Test Agency Admin'. A dropdown menu is open, showing options: 'Shadow', 'Enter Data As Heading Home - Rowan ...', 'Back Date', and 'Connect To ART'. Two green arrows point from the text 'Default EDA mode vs Manual EDA mode' to the 'Enter Data As' option and the 'Shadow' option respectively.



Home > Home Page Dashboard   

Last Viewed | **Favorites**

- Home
- ClientPoint
- ResourcePoint
- ▶ FundManager
- ShelterPoint
- ▶ Reports
- ▶ Admin

System News (18)  | **Agency News (1)**  

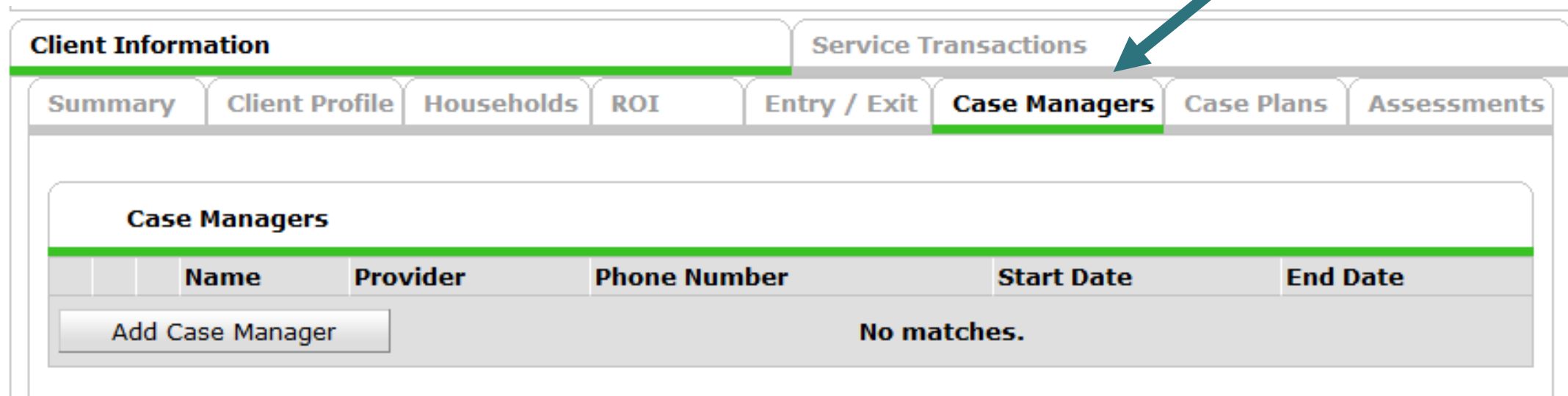
Date	Headline
 06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight
 04/10/2020	Updated COVID-19 questions + guidance
 03/18/2020	New data for COVID-19 Response
 03/09/2020	Warning: Do Not Use Verify & Save
 03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend

Follow Up List (0)  

Client ID	Type	Date	Time Remaining
-----------	------	------	----------------

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



The screenshot displays the ClientPoint interface. At the top, there are two main tabs: 'Client Information' (highlighted with a green bar) and 'Service Transactions'. Under 'Client Information', there are several sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers' (highlighted with a green bar and pointed to by a teal arrow), 'Case Plans', and 'Assessments'. Below the 'Case Managers' tab, there is a table with the following columns: 'Name', 'Provider', 'Phone Number', 'Start Date', and 'End Date'. The table currently contains the text 'No matches.' and an 'Add Case Manager' button is visible in the bottom left corner of the table area.

Add a Case Manager

Decision Points:

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

Case Manager


Case Manager - (4) Solo, Han


▼ Household Members

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

(125413) Single Parent

(4) Solo, Han

 (501224) Solo, Ben

Type *  ServicePoint User Me Other

Select User *
Heading Home - Rowan County (7388) ▼
-Select- ▼

Name *
Title

Add a Case Manager

Decision Points:

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

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

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

(125413) Single Parent

(4) Solo, Han


(501224) Solo, Ben

Type * ServicePoint User Me Other

Select User *

Name *

Title



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?

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

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

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben


Type * ServicePoint User Me Other

Name *

Title

Phone Number

Email Address



Contact Info opens up to be manually added

Add a Case Manager

Usually, you are selecting yourself!

Name & Contact Info automatically appears

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

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

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type * ServicePoint User Me Other

Name * Helen Housing Test

Title

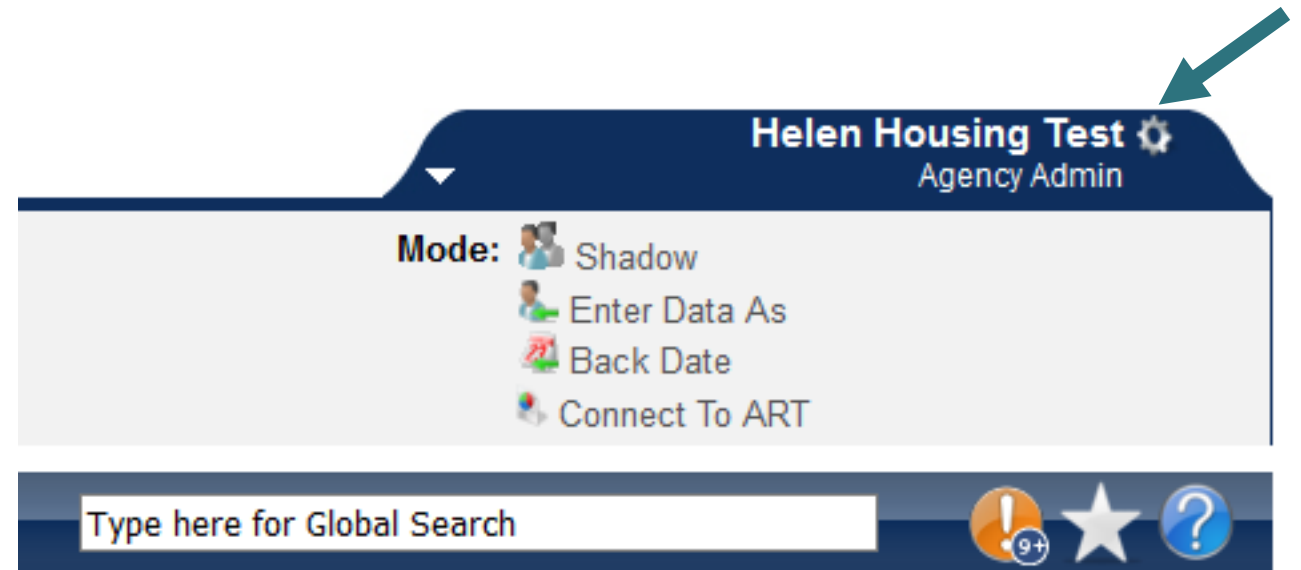
Phone Number

Email Address hmis@ncceh.org

How do you manage contact info in HMIS

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

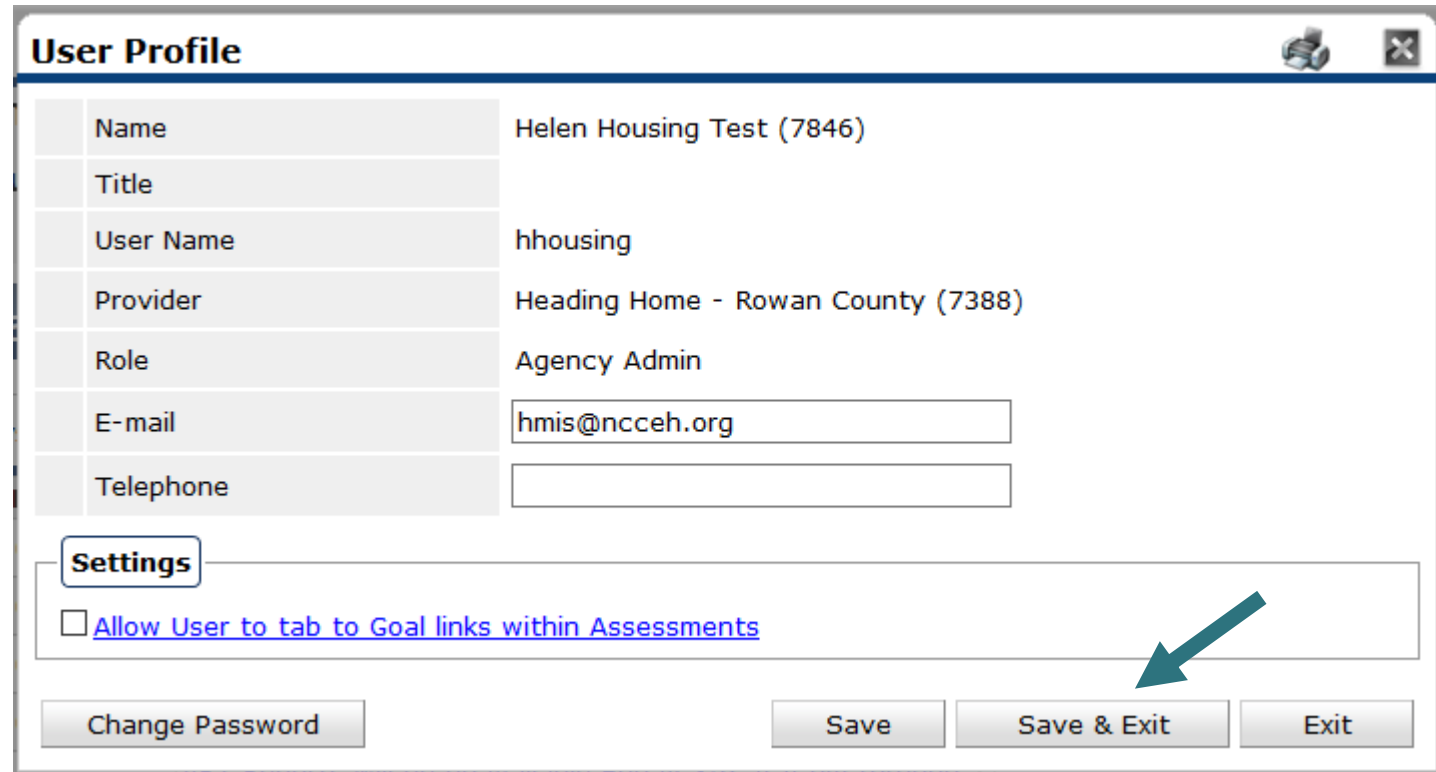
- Find the User Profile Setting icon



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



User Profile

Name	Helen Housing Test (7846)
Title	
User Name	hhousing
Provider	Heading Home - Rowan County (7388)
Role	Agency Admin
E-mail	<input type="text" value="hmis@ncceh.org"/>
Telephone	<input type="text"/>

Settings

[Allow User to tab to Goal links within Assessments](#)




NCCEH

Add a Case Manager

Decision Points:







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

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


(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type *	<input type="radio"/> ServicePoint User <input checked="" type="radio"/> Me <input type="radio"/> Other
Name *	Helen Housing Test
Title	
Phone Number	
Email Address	hmis@ncceh.org
Provider *	Heading Home - Rowan County - Rapid Re-Housing - ESG (7390) ▾
Start Date *	06 / 10 / 2020   
End Date	/ /   

Already there because of EDA mode!



Case Manager Saved!




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

Release of Information: **Ends 04/10/2021** -Switch to Another Household Member-

Client Information Service Transactions

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

Case Managers

			Name	Provider	Phone Number	Start Date	End Date
			Helen Housing Test	Heading Home - Rowan County - Rapid Re-Housing - ESG		06/10/2020	

Showing 1-1 of 1



What's Next?

What's Next Calendar

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



Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



NCCEH



Questions?

Let's Troubleshoot!