Balance of State
HMIS Users Meeting
March 2018

North Carolina Coalition to End Homelessness
securing resources   encouraging public dialogue   advocating for public policy change

NCCEH
DATA CENTER

March 2018 Agenda

1. Welcome to the 1st BoS User Meeting!

2. Data Entry Essentials: EDA & Backdate Mode

3. Improving Data Understanding: Prior Living and Destination

4. Importance of Interims Housing Move-In Date

5. Talk to Us: Household Composition & Visibility

6. What's Coming Up? Updates on PIT/HIC & HMIS@NCCEH

Make sure you're counted!

This box is located in the top, center of your screen

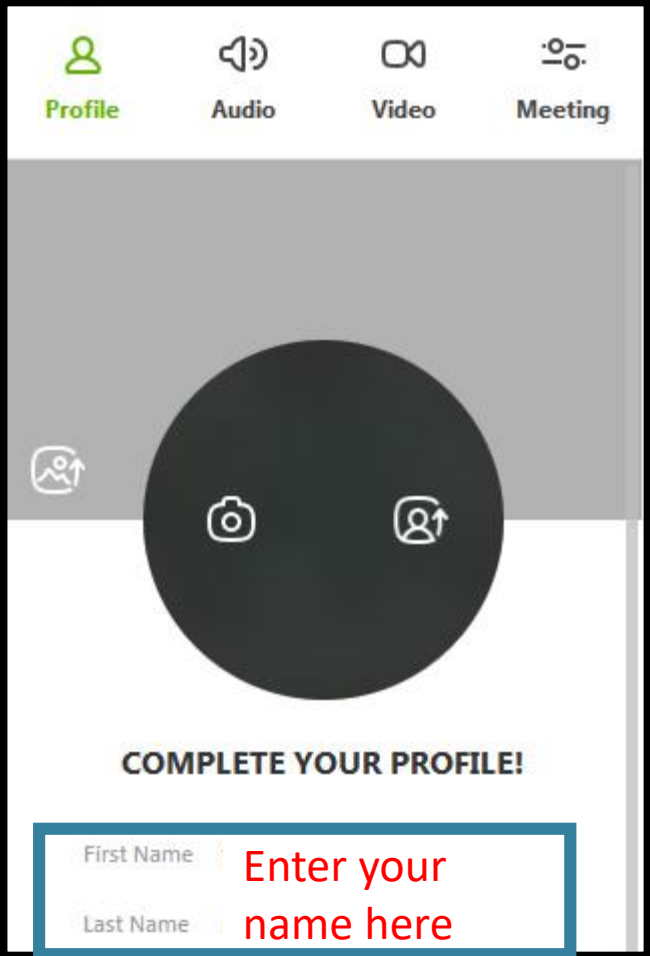# Enter your name so we know who's here

1 Click this icon

2

- Request presenter role
- Request mouse control
- Request to annotate
- Settings
- Exit this meeting

3

Profile   Audio   Video   Meeting

COMPLETE YOUR PROFILE!

First Name   Enter your
             name here
Last Name

Welcome!

1 This is the 1ˢᵗ Balance of State HMIS User Meeting

We've got goals:
Improve HMIS knowledge and skills
Informative (for us and you)
Interactive

We really like feedback!

This icon means we want to hear from you
But feel free to speak up or ask a question at <u>any</u> time

Data Entry Essentials

EDA and Backdate Mode

Each building represents an agency
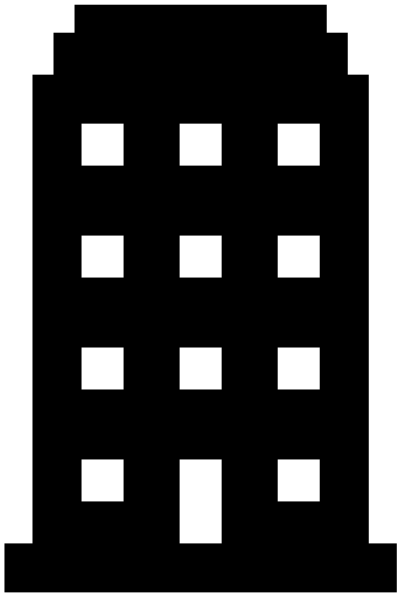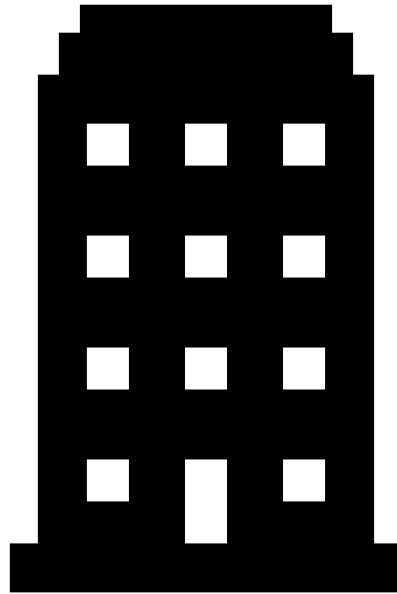
Agency 1   Agency 2   Agency 3   Agency 4
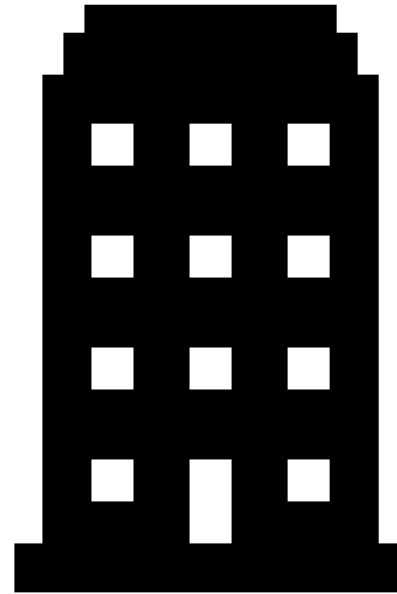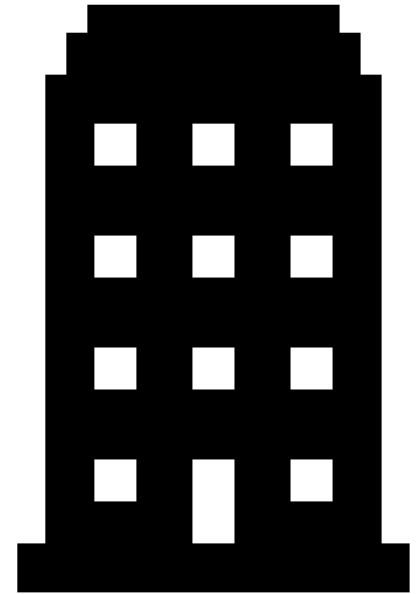
Each door is a project in your agency

Project A

Project B

Project C

Some users only see 1 door

Project A

Examples:

Users from agencies that have only 1 project

Users from agencies that have multiple projects, but only enter data into 1 project

Some users see all doors within their agency

Project A

Project B

Project C

Examples:

Agency Administrators from agencies with multiple projects

Users who enter data into more than 1 project within their agency

Each door has a keypad

Entering the correct **EDA** into the keypad will open the door

Not opening the door-
Entering data without EDA

Project A

Project B

Project C

Data is placed in front of the correct door, but not inside the room ✗

Not using EDA = Problems

Visibility
Client data cannot be seen in ClientPoint by those who should be able to see it

Privacy and Security
We are better able to ensure data is accessed only by those with permission when it is in the correct place

Data Quality/Reporting
Client data can be seen in ClientPoint, but is not pulled into reports

Opening the door-
Entering data with EDA

Project A
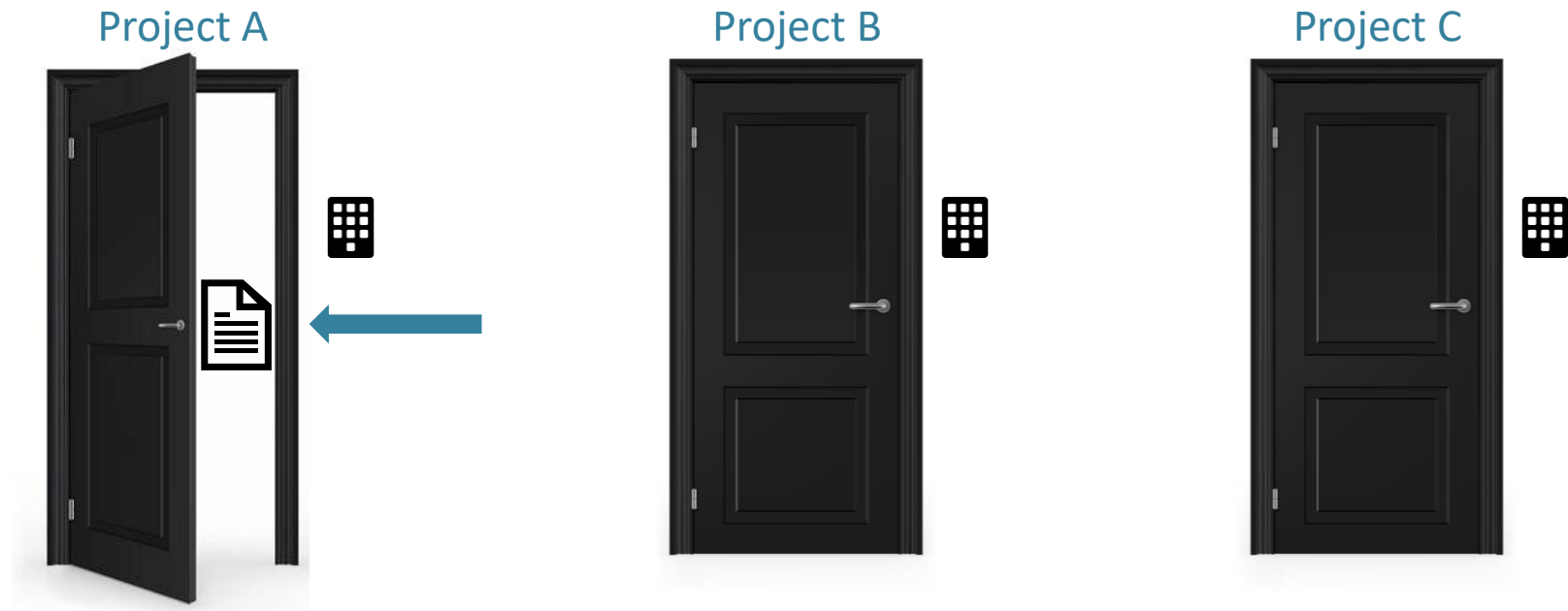
Project B

Project C

✓ Data placed inside Project A

If you only see 1 door, it's always open

Project A

Users who only enter data into one project do not need to EDA **IF** client is entering this project.

Their default EDA opens the door automatically.

Know your default EDA mode

Level 4 – Agency
You must enter EDA mode for all client data entry

Level 5 - Project - "Agency – County – Project details" name
Users at this level can use this for client data entry IF the client is entering this project
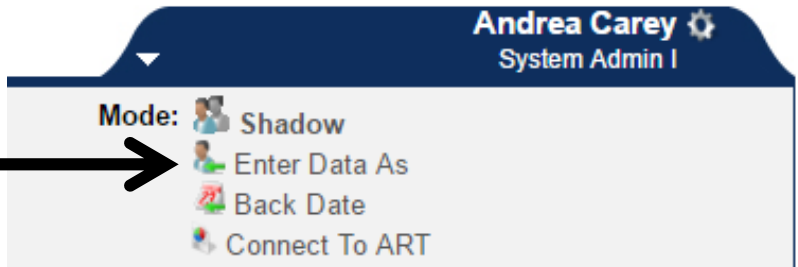
What is your default EDA mode? Do you need to EDA before entering client data?

Select EDA before entering client data

Andrea Carey ⚙
System Admin I

Mode: 👥 Shadow
👤 Enter Data As
📅 Back Date
🌐 Connect To ART

1 Click Enter Data As ➡

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

2 Enter the project name and click search ➡

Search [   ] Show Adv

[Search]   [Clear]

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P

Provider	Level	Phone
Pasquotank Human Services – Pasquotank County – Family Shelter – State ESG	Level 5	919-856-

3 Click the green circle to select the specific project for your client ➡

How to verify you're in EDA Mode

Mode:
- Shadow
- Enter Data As   Pasquotank Human Ser...
- Back Date

Pasquotank Human Services – Pasquotank County – Family Shelter – State ESG
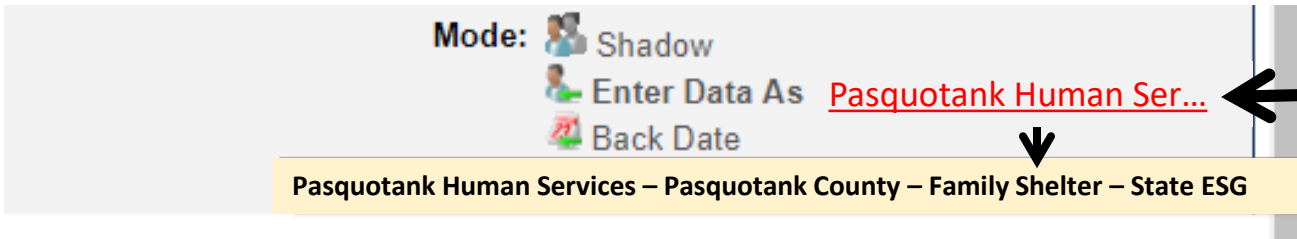
Hover over the blue letters to read the entire project name

Mode:
- Shadow
- Enter Data As   Pasquotank Human Ser...
- Back Date
- Connect To ART
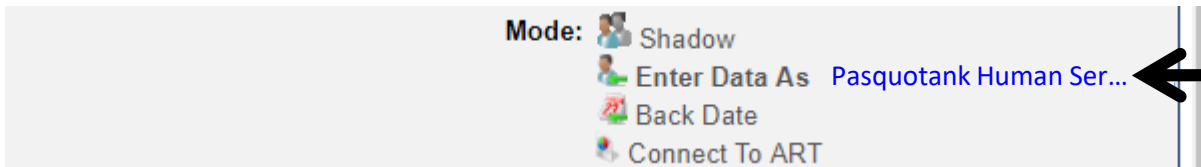
Click on the blue letters to **exit** EDA mode

Do **NOT** use Provider drop-downs

Enter Data As pre-selects Providers

Release of Information Data

Provider *	Heading Home Housing - Rowan County - Rapid Re- Housing - HUD (7223)	Search	My Provider	Clear
Release Granted *	-Select- ▾			
Start Date *	10 / 08 / 2017			
End Date *	/ /			

Most projects do not enter data in real time

03/09/2018

Data Collected

Client enters project, staff complete intake/assessment paperwork

03/15/2018

Data Entered into HMIS

Data is entered into NC HMIS by a licensed user
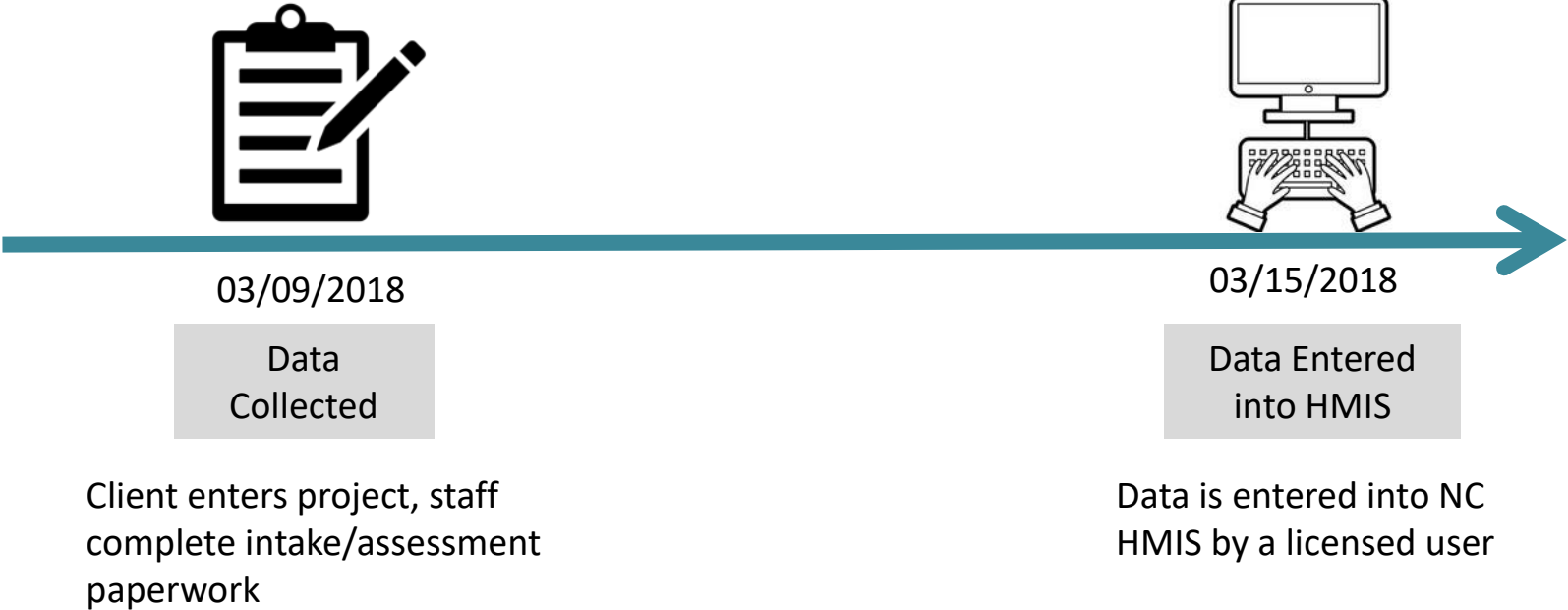
What is the workflow like at your agency? Any plans to enter data in real time?

Backdate if not entering data day of

Andrea Carey ⚙
System Admin I

Mode: 👥 Shadow
👤 Enter Data As
📅 Back Date
🔴 Connect To ART

Click Back Date ➡

Back Date Mode ✖

Back Date Mode allows you to enter historic information for a client.

10 / 08 / 2017 📅🔄📅 2 ▼ : 00 ▼ : 00 ▼ AM ▼

Set Back Date   Cancel

Enter date
Click Set Back
Date Button ➡

How Back Date Mode should look

Top ribbon is yellow when
in Back Date mode

Andrea Carey ⚙
System Admin I

Mode: Shadow
Enter Data As
Back Date 10/08/2017 2:00:00 AM ❌
Connect To ART
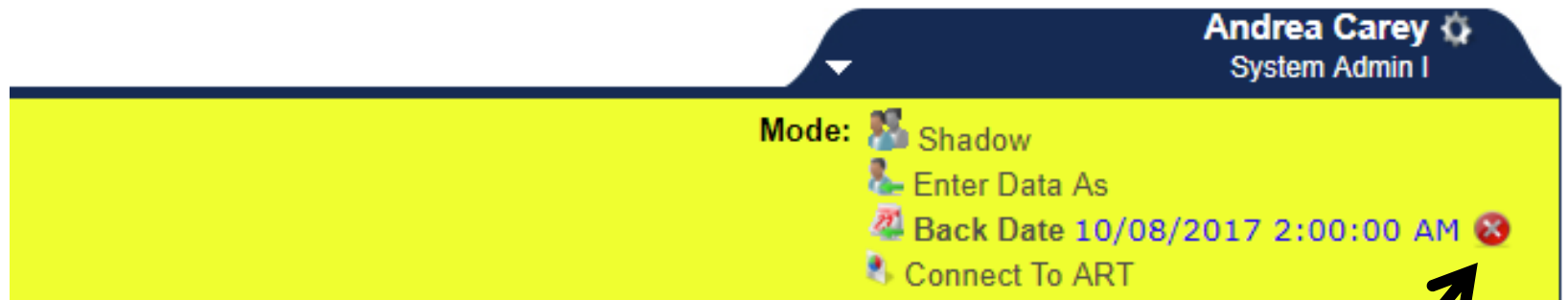
To exit Backdate mode

Improving Data Understanding
Prior Living Situation & Exit Destination

Your HMIS data matters!
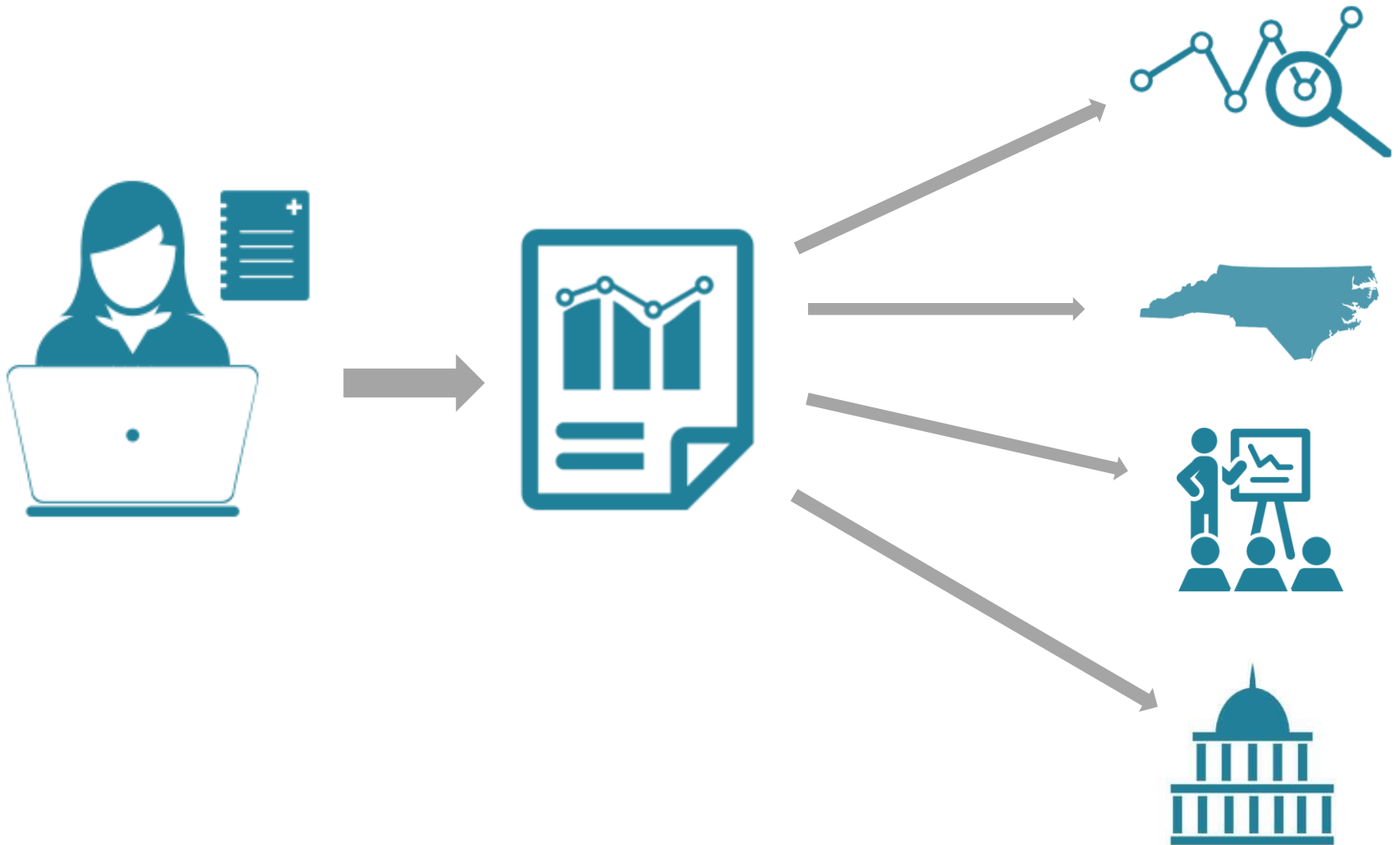
Prior Living Situation

Definition	The type of residence that most closely matches where the client was living prior to project start
Collection Point	Project Start
Subject	Head of Household and Adults
Special Notes	• Adult members of the same household may have different prior living situations. • All project types are presented with this question

Prior Living Situation will help us better understand our clients and our system

Eligibility and vulnerability patterns

Are we sheltering or housing homeless clients? Or at-risk clients? What percentage?

Completeness and Accuracy

Where are they just before seeking our help?

How does our workflow collect client data?

3 categories for Prior Living Situation
Examples of residences in each category

Literally Homeless Situation
    Place not meant for habitation
    Emergency Shelter
    Interim Housing (Chronic Homeless only)

Institutional Situation
    Hospital
    Foster care
    Jail/Prison

Transitional & Permanent Housing Situation
    Permanent supportive housing
    Transitional housing
    Rental by client

These questions are required for all Heads of Household and Adults

Questions must be asked exactly as they are presented below.

Prior Living Situation (Immediately Prior to Entry)	-Select-	
Length of Stay in Previous Place	-Select- ▼	**G**

Prior Living Situation dropdown in HMIS

Questions must be asked exactly as they are presented below.

Prior Living Situation (Immediately Prior to Entry)	-Select- ▼

-Select-
----- HOMELESS SITUATION -----
Place not meant for habitation (HUD)
Emergency shelter, including hotel or motel paid for with emergency shelter voucher (HUD)
Safe Haven (HUD)
Interim Housing
----- INSTITUTIONAL SITUATION -----
Foster care home or foster care group home (HUD)
Hospital or other residential non-psychiatric medical facility (HUD)
Jail, prison or juvenile detention facility (HUD)
Long-term care facility or nursing home (HUD)
Psychiatric hospital or other psychiatric facility (HUD)
Substance abuse treatment facility or detox center (HUD)
----- TRANSITIONAL AND PERMANENT HOUSING SITUATION -----
Hotel or motel paid for without emergency shelter voucher (HUD)
Owned by client, no ongoing housing subsidy (HUD)
Owned by client, with ongoing housing subsidy (HUD)
Permanent housing (other than RRH) for formerly homeless persons (HUD)
Rental by client, no ongoing housing subsidy (HUD)
Rental by client, with VASH subsidy (HUD)
Rental by client, with GPD TIP subsidy (HUD)
Rental by client, with other ongoing housing subsidy (including RRH) (HUD)
Residential project or halfway house with no homeless criteria (HUD)
Staying or living in a family member's room, apartment or house (HUD)
Staying or living in a friend's room, apartment or house (HUD)
Transitional housing for homeless persons (including homeless youth) (HUD)
Client doesn't know (HUD)
Client refused (HUD)
Data not collected (HUD)

At Bottom of list

Length of Stay in Previous Place

Approximate date homelessness started:

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

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

Housing Status

Zip Code (of Last Permanent Address, if known)

30

Henrietta enters Emergency Shelter on 08/15/17

Question	Henrietta's Response
Residence Prior to project entry?	Streets
Length of stay in prior living situation?	1 year or longer

Henrietta enters Emergency Shelter on 08/15/17
(HMIS View)

Questions must be asked exactly as they are presented below.

Prior Living Situation (Immediately Prior to Entry)	Place not meant for habitation (HUD) ▼ **G**
Length of Stay in Previous Place	One year or longer (HUD) ▼ **G**

Exit Destination

Definition	Where a client will stay just after exiting a project
Collection Point	Project Exit
Subject	All clients
Special Notes	If client exits without providing destination information to staff, and no other credible information is available, the "No exit interview completed" response should be used

Click here for more information → NCCEH Data Center Destination Guide

Exit Destination will help us learn more about our clients and our system

Outcomes and Performance patterns

Are we sheltering or housing homeless clients?

Are the "Reasons for Leaving" patterns that indicate permanent housing success?

Completeness and Accuracy

Where are they right after seeking our help?

How does our workflow collect client data?

Sometimes we don't know where clients went...

09/14/17 — 09/30/17 — 10/24/17

Client Presents

Henrietta comes to agency get info about services

Project Entry

1st night Henrietta is in a ES/TH bed

Staff verify client was in bed 09/30/17-10/23/17

Project Exit

Henrietta leaves No destination info is provided
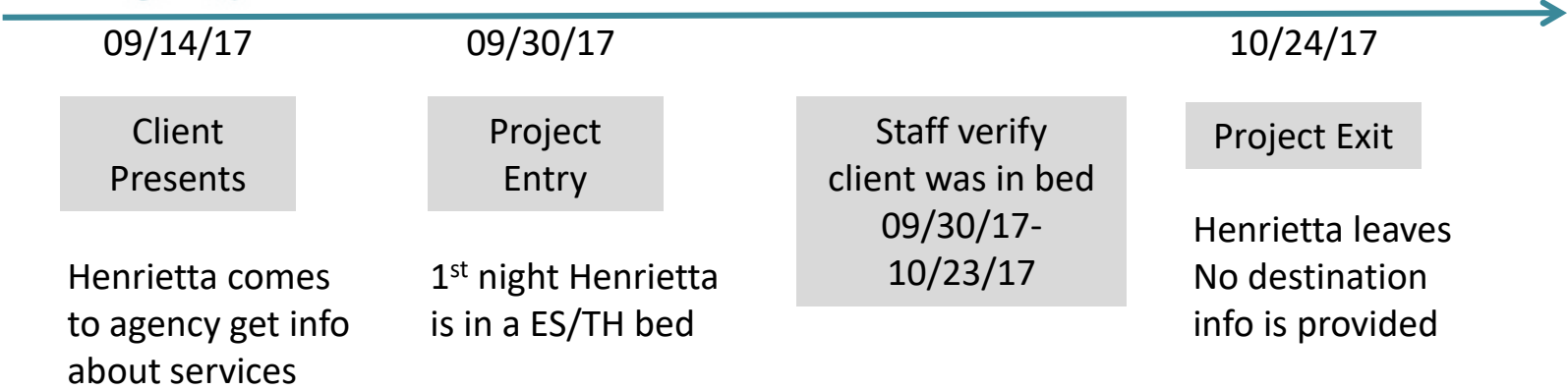
HUD encourages us to get more info about Exit Destination

Info from Client

HMIS

Info from Staff

Use all of this information to better understand where the client went after leaving your project
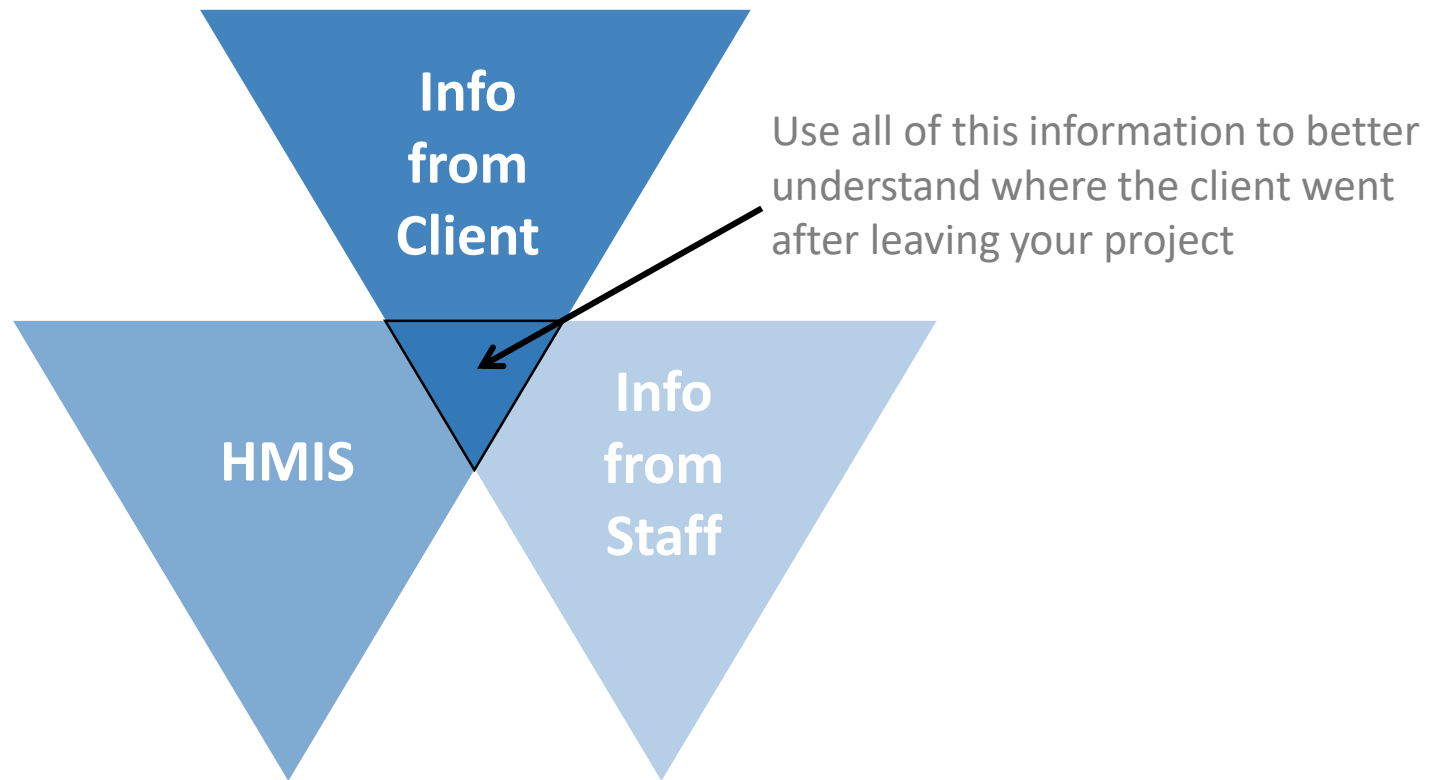
This can lead to 'red flags' or null responses

Do <u>not</u> enter inaccurate information into HMIS!
Missing data is always better than inaccurate data

When to select "No exit interview completed"?
If sources are not available—client did not provide info, staff do not have info, and there is no other HMIS data

Want to use Other?
Call the us at the Helpdesk first!

Sometimes responses aren't updated

1/14/18	1/15/18		1/15/18	1/16/18		1/18/18	1/19/18
Project Entry	Project Exit		Project Start	Project Exit		Project Start	Project Exit
Prior Living Situation: Hospital	**Destination:** Staying with friends, temporary		**Prior Living Situation:** Hospital	**Destination:** Staying with friends, temporary		**Prior Living Situation:** Hospital	**Destination:** Staying with friends, temporary
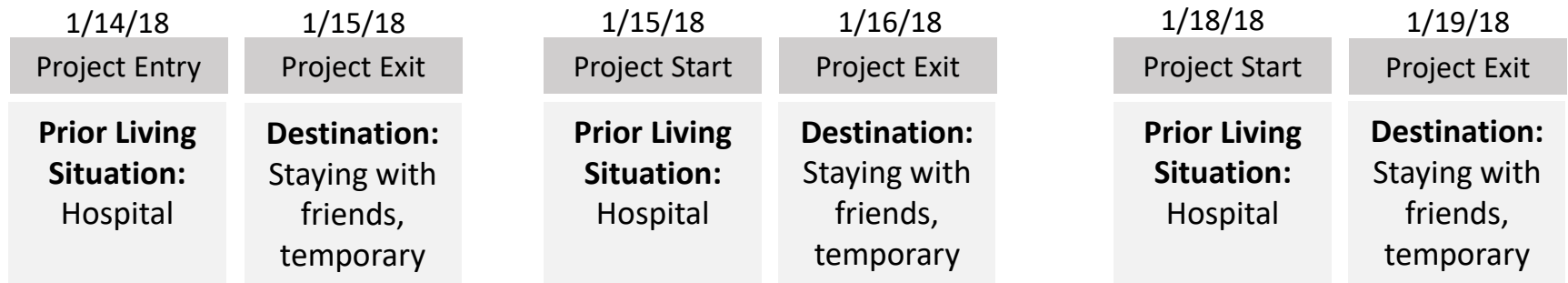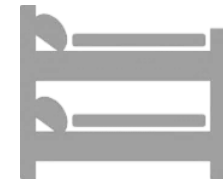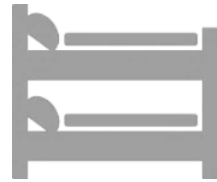
Is this accurate? Help us identify the issues with Prior Living and Exit Destination.

Every response should align with every entry
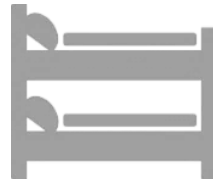
1/14/18	1/15/18	1/15/18	1/16/18	1/18/18	1/19/18
Project Entry	Project Exit	Project Start	Project Exit	Project Start	Project Exit
Prior Living Situation: Hospital	**Destination:** Emergency Shelter	**Prior Living Situation:** Emergency Shelter	**Destination:** Staying with friends, temporary	**Prior Living Situation:** Place not mean for habitation	**Destination:** Staying with friends, temporary

Interim Updates and Annual Assessments

The HMIS Data Collection Stages

Record Creation	Project Start	Update	Annual Review	Project Exit	Post Exit

| When client record is created | At every project start | At multiple points during project enrollment | Recorded no more than 30 days before or after the anniversary date of the HoH's Project Start Date | At every project exit | |

*All Permanent Housing projects must record Move-in dates as an Interim Review – Update

Interim Review Data

Use interim reviews to update client information <u>whenever</u> it changes

Use Interim Review Type : "**Update**"

Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Emergency Shelter - State ESG (7124)
Entry / Exit Type	HUD
Interim Review Type *	Update ▾
Review Date *	03 / 13 / 2017 📅🔄📅 5 ▾ : 09 ▾ : 23 ▾ PM ▾

Entering Updates in ClientPoint

Client - (9) Lacks, Henrietta   Mass Visibility Update

(9) Lacks, Henrietta

Release of Information: Ends 10/17/2017   -Switch to Another Household Member- ▾   Submit

Client Information   Service Transactions

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

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

Entry / Exit

	Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count	
	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)	HUD	✏ 10/17/2016	✏	📋	📋	🔍❷	🖌

Add Entry / Exit   Showing 1-1 of 1

Updates are entered
through "Interims"

Adding an Interim Review

Select the Review Type

Add Interim Review - (9) Lacks, Henrietta

Household Members

ℹ To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

☐ **(3) Single Parent**

☑ (9) Lacks, Henrietta (Entry Date: 10/17/2016 8:31 PM)

☑ (12) Lacks, Harry (Entry Date: 10/17/2016 8:31 PM)

Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)
Entry / Exit Type	HUD
Interim Review Type*	-Select- ▼
Review Date*	-Select- Update Annual Assessment Follow-up

8 ▼ : 32 ▼ : 20 ▼ PM ▼

Save & Continue   Cancel

Include appropriate HH members

Select type of review from drop-down

Enter Review Date + Save & Continue

Add Interim Review - (9) Lacks, Henrietta

Household Members

ⓘ To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

☐ **(3) Single Parent**

☑ (9) Lacks, Henrietta (Entry Date: 10/17/2016 8:31 PM)

☑ (12) Lacks, Harry (Entry Date: 10/17/2016 8:31 PM)

Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)
Entry / Exit Type	HUD
Interim Review Type *	Update ▾
Review Date *	10 / 18 / 2016 🗓🔄🗓 8 ▾ : 46 ▾ : 51 ▾ PM ▾

→ Save & Continue | Cancel

Complete Update data entry

Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	10/18/2016 08:46:51 PM

Interim Review Assessment

Household Members

NC HMIS Update   Interim Review Date: 10/18/2016 08:46:51 PM

(9) Lacks, Henrietta
Age: 26
Veteran: No (HUD)

(12) Lacks, Harry
Age: Unknown
Veteran: No (HUD)

ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN unless specified otherwise

| Covered by Health Insurance	-Select- ▼ G

🔍 **Health Insurance**   **HUD Verification** ⚠

Start Date *	Health Insurance Type	Covered?	(HOPWA) If Private Pay Insurance, Specify	(HOPWA) If No, Reason not covered	End Date
Add					

Don't forget other Household Members ↑

Scroll down

Permanent Housing Projects:
Add update when client moves into Permanent Housing

Program Entry
06/01/16

Move-In Date
06/29/16

Program Exit
09/01/16
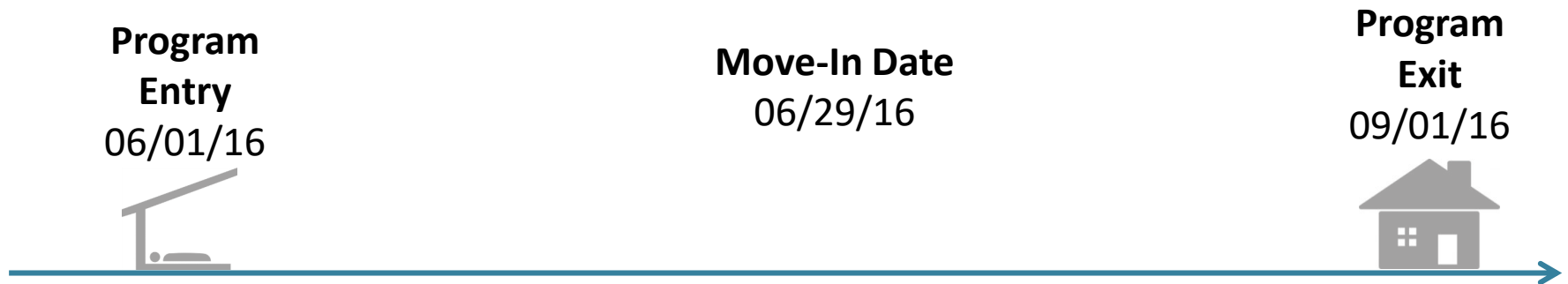
Add an Interim Update in HMIS to enter the Move-In Date

Housing Move-In Date = 06/29/2016

The Housing Move-In Date MUST be entered via an INTERIM ASSESSMENT with a timestamp that occurs after the Project Start and before the Project Exit. If client is not in housing leave this question blank.

This question differentiates between clients who are awaiting placement and those who have moved into any type of permanent housing, regardless of funding source or whether the project is providing rental assistance.

HOUSING MOVE-IN DATE (Head of Household Only)

Housing Move-in Date [ ] / [ ] / [ ]

Note: If client is not housed with $$ from your project, do **not** enter a Housing Move-In Date

Annual Assessments

Required for clients who have stays of 365+
- Within +/- 30 days of anniversary of the client's project entry date
- Even if there is no change in client's responses

Information must be accurate as of the information date

Use Interim Review Type: **Annual Assessment**

Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Emergency Shelter - State ESG (7124)
Entry / Exit Type	HUD
Interim Review Type *	Annual Assessment ▾
Review Date *	03 / 13 / 2017 5 ▾ : 09 ▾ : 23 ▾ PM ▾

Conduct Annual Assessments Every 365 Days

Required for clients that are in a project for 365 days or more.
Usually completed by projects with longer stays: TH, RRH, PSH,
HUD has changed when Annuals are conducted for clients

To illustrate the change, we'll look at Henrietta's Household

Henrietta
HoH

Sarah
Adult

Anna
Child
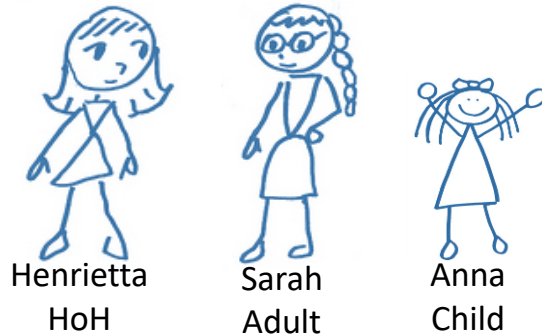
Annual Assessment is now based on Head of Household Start Date

Conducted no more than 30 days before or 30 days after the anniversary of the **Head of Household's Project Start Date**.

04/17/16	Henrietta Project Start
07/01/16	Sarah Project Start
09/20/16	Anna Project Start
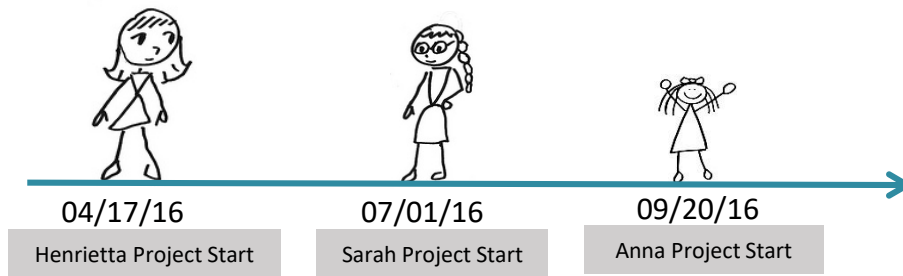
Name	R-H	Project Start	Anniversary
Henrietta	HoH	04/17/16	04/17/17
Sarah	Adult	07/01/16	04/17/17
Anna	Child	09/20/16	04/17/17

Annual assessments are based **solely** on the head of household's anniversary date.

The annual assessment must include updating both the head of household's record and any other family member's at the same time

When to complete an Annual Assessment

Date Type	Date
Client Entry Date	10/17/2016
Client Anniversary Date	10/17/2017
30 days before Anniversary Date	09/17/2017
30 days after Anniversary Date	11/16/2017

When should record the Annual Assessment?
Within 09/17/2017 – 11/16/2017

Talk to Us

Household composition in HMIS

HMIS can help track some aspects of household composition – but has limits

Do households typically stay the same throughout the project enrollment?

What would be useful to know about household composition for your agencies?

Visibility Feedback

Many BoS users experience visibility issues in HMIS

Identified Causes:
HMIS Tree Structure/Configuration
Visibility Group
Agency or Project Location
License Location
Lack of ROI

We will fix these issues in the new implementation; we need your help to ensure everything gets resolved

Are you experiencing viz issues? Speak up- we're taking notes and will follow up!

What's on Deck

HMIS @NCCEH Update

A new Homeless Management Information System at the North Carolina Coalition to End Homelessness will be launched in early June 2018!

This new HMIS is being created to better meet the needs identified by NCCEH and Durham, Orange and Balance of State CoCs.

What Should I Expect?
- New and improved training, workflows and forms
- A new ServicePoint website URL

What Should I Do Now?
- Keep entering data into NCHMIS until notified to stop – we'll notify in June.
- Stay informed! We'll send out communication with FAQs and more info soon.
- Ask us questions! Contact Ben Bradley, NCCEH Project Specialist (Ben@ncceh.org) if you have any questions. If needed, he'll schedule time for you to speak with Denise Neunaber, NCCEH Executive Director.

2018 PIT/HIC Update

Submissions for ES and TH were due February 21

-All submissions have been reviewed

-Data Center staff are working with HMIS users to make data corrections, and re-submit new reports

Submission date for RRH and PSH TBD

-Errors found in the 0628 report- Clients with move in dates after October 3, 2017 are NOT counted

-Mediware/Bowman says a new report will be available at the end of this week

Upcoming Deadlines and Events

Due	Report Name
Feb 28	ES and TH Deadline for PIT/HIC Submissions*
March - April	**PIT/HIC** **System Performance Measures**
March 27	Entry/Exit Training 10 am -1 pm @ NCCEH
March 29	NC County of Service & Location Webinar
April 12	Entry/Exit Training 1 pm -4 pm @ NCCEH
April 26	Entry/Exit Training 1 pm -4 pm in Durham
June	HMIS Transition: New website URL
November	Longitudinal System Analysis (new name for AHAR)

Questions?
Comments?
Feedback?

ncceh.org/hmis

access local support for Balance of State, Wake, Durham, & Orange CoCs

919.410.6997 or **hmis@ncceh.org**

helpdesk for local support