Orange CoC
HMIS Users Meeting

September 2019
Pre-Meeting Quick Tip:

Did you know that HMIS can track a client’s Case Manager contact?
Record the client’s Case Manager

1. Go to a client’s profile through *ClientPoint*
2. Click on the *Case Managers* tab
3. Click on *Add Case Manager*
Identify yourself as Case Manager

4. Check the box of all current *Household Members* so that no matter which client is selected, the correct staff member will appear.

5. If the Case Manager will be you, select *Me* as the Type.
Select a different Case Manager

6. If the Case Manager will be another HMIS User, keep Type as ServicePoint User.
   a) Next, change the Select User dropdown to the project where staff are assigned.
   b) Then, select the name of staff who is the client’s Case Manager.

7. Contact information will automatically appear if it is connected to the staff’s HMIS profile.
8. The *Provider* will list your current EDA mode. Keep that to confirm the agency/project staff work for.

9. Click *Add Case Manager* to save.
Orange
HMIS Users Meeting
September 2019
Agenda
September 2019

System Updates
HMIS@NCCEH assessments
  Hurricane Dorian
  Homeless History
HMIS Data Standards 2020 Updates
HMIS CoC-APR and ESG-CAPER Report Updates

How can we help?
Enter Data As & Back Date modes
NC County of Service & Client Location
Reason for Leaving & Destination

What’s Next
Welcome

Reminders
Your line is muted. We will unmute the line during Q&A pauses.

The chat box is available
Make sure you’re counted!

Enter your name(s) so we know you are here

1. Click Attendees
2. Click on (me)
3. Click Edit your Name and Email...
System Updates
Hurricane Dorian added to NC Natural Disaster sub-assessment

In HMIS

- Select Hurricane Dorian - September 2019

On Paper

- Place not meant for habitation
- Emergency shelter, including hotel or motel paid for with emergency shelter voucher
- Interim Housing
- Foster care home or foster care group home
- Hospital or other residential non-psychiatric medical facility
- Jail, prison, or juvenile detention facility
- Long-term care facility or nursing home
- Psychiatric hospital or other psychiatric facility
- Substance abuse treatment facility or detox center
- Hotel or motel paid for without emergency shelter voucher
Language for questions updated in HMIS

<table>
<thead>
<tr>
<th>Language changed from</th>
<th>Language changed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>When did the client start staying on the streets or in emergency shelters this time?</td>
<td>Approximate date homelessness started:</td>
</tr>
<tr>
<td>Total monthly Income</td>
<td>Total monthly income</td>
</tr>
<tr>
<td>Non-Cash Benefit from any source</td>
<td>Non-cash benefit from any source</td>
</tr>
</tbody>
</table>
Client Location Update

• Rationale: To link client household data to the relevant CoC

Where’s the $$$$?
Outreach Contact is now Current Living Situation

Street outreach projects only

- Rationale: To record each contact with people experiencing homelessness by street outreach and other service projects
  - To provide information on the number of contacts required to engage the client
  - To document a current living situation as needed in any applicable project
- Instruction: Record the date and location of each interaction with a client
Domestic Violence History

- Rationale: To indicate whether heads of household and other adults served are survivors of domestic violence.
- Instruction: A record must be created as of the date of the project start, and updated during project enrollment.
Housing Assessment at Exit

- Includes HOPWA and ESG Homeless Prevention projects
- Instruction: Record if the client maintained or changed housing situations and corresponding subsidy information
New report required for Sage uploads on October 1\textsuperscript{st}

- Finish up before then
- or wait for new HMIS report

Report Updates

- Q4a (HMIS Info) includes CoC code, Geocode, VSP, HMIS Software Name, Report Start & End Date.
- Q7 & Q8 PIT persons and households served now report only those in housing for PH projects
- Q19a3 removed for Client Cash Income Change by Start and Latest Status/Exit
- Q19b – new Disabling Conditions and Income for Adults at Exit
- Q23a and 23b removed – Destination includes all leavers regardless of time in project
How can we help?
Before you enter data: Projects
What’s tracked behind the scenes?

Project: what funding supports these clients?
Alex entered the shelter program funded by County ESG dollars and must be recorded in the Emergency Shelter County ESG project.

Shelter - County ESG Project

Alex enters Wednesday
What’s tracked behind the scenes?

Project: what funding supports these clients?
If Alejandro uses a White Flag Emergency Shelter bed funded by State ESG instead, what would Alejandro’s project be?

Alejandro enters
Friday
What’s tracked behind the scenes?

**Project: what funding supports these clients?**
If Alejandro uses a White Flag Emergency Shelter bed funded by State ESG instead, what would Alejandro’s project be?

WF Shelter - State ESG Project

Alejandro enters
**Friday**
What’s tracked behind the scenes?

Clients are separated by HMIS project type and funding source
Imagine our HMIS region is a city

Welcome to HMIS @ NCCEH!
Each building is an Agency in our community

Agency A  Agency B  Agency C  Agency D
Each door is a project within an Agency

- Emergency Shelter - State ESG
- Transitional Housing - Private
- Rapid Re-Housing - CoC
- Permanent Supportive Housing - CoC
Each door has a security keypad

This security is called Enter Data As in HMIS

- Emergency Shelter - State ESG
- Transitional Housing - Private
- Rapid Re-Housing - CoC
- Permanent Supportive Housing - CoC
Data is secure and organized behind a door

Data must be within the right door to be accessible when you need it – for viewing, reporting, or sharing

Use Enter Data As (EDA) mode in HMIS to secure and locate data!
Data is secure and organized behind a door

If Enter Data As mode is not used, client data can look blank, be accidentally shared, or not appear in reports.

Don’t leave your data in front of the right door but in the hallway!
If data is left in the hallway

**Visibility Problems**
Client data cannot be seen in ServicePoint by those who should be able to see it

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

**Data Quality/Reporting Problems**
Client data can be seen in ServicePoint, but is not pulled into reports
Know your default Enter Data As mode
Default Enter Data As mode: Agency Level
Default Enter Data As mode: Project Level

Agency Name  County Name  Project Type/Name  Funding Source
Remember, the Project Level is where data should be entered.
Enter a new Enter Data As Mode

If your Default EDA mode is not where your client entered, you can change your EDA mode.
Quick Tip: you don’t have to Search. Projects are already listed below!

Enter a new Enter Data As Mode

<table>
<thead>
<tr>
<th>Provider Name</th>
<th>Level</th>
<th>Phone</th>
<th>Location</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heading Home Housing - Rowan County - Emergency Shelter - Private (5)</td>
<td>Level 5</td>
<td>Unknown</td>
<td>Sailsbury, NC 28147</td>
<td>01/03/2019</td>
</tr>
<tr>
<td>Heading Home Housing - Rowan County - Emergency Shelter - State ESG (10)</td>
<td>Level 5</td>
<td>Unknown</td>
<td>Salisbury, NC 28147</td>
<td>01/03/2019</td>
</tr>
<tr>
<td>Heading Home Housing - Rowan County - Rapid Re-Housing - ESG (6)</td>
<td>Level 5</td>
<td>Unknown</td>
<td>Salisbury, NC 28147</td>
<td>08/14/2018</td>
</tr>
</tbody>
</table>
Add: Click the plus sign to select the right project for your client!

Enter a new Enter Data As Mode
You are in a new Enter Data As mode!
Hover over the new project name

You can hover to view the full name of the project you selected
Before you enter data: Dates
Types of Data Entry

Delayed using Paper Forms

Live Data Entry during client interview

Hours or Days later
What is the right date for your data?

Wednesday
- **Data Collected**
  - Client enters project, staff complete intake/assessment paperwork

Friday
- **Data Entered into HMIS**
  - Data is entered into HMIS by a licensed user
What is the right date for your data?

Wednesday
Data Collected

Friday
Data Entered into HMIS

Time between = Timeliness
Why is timeliness important?

**More Accurate** – the more time that passes, the less accurate the data
  - Missing or inaccurate data could be found on paper forms, but the client maybe already exited
  - Typos and mistakes made more often

**More Useful** – when data is up to date, everyone is better off
  - Clients can get the referrals they need
  - Agencies know who they serving at any time and can reduce trackers
  - CoCs can report on data with confidence
How to enter data with the right date?

Back Date mode allows HMIS users to select the correct date

- **Wednesday**
  - Data Collected

- **Friday**
  - Data Entered into HMIS
How to enter data with the right date?

1. Click Back Date
2. Enter date and
3. Click Set Back Date
How to enter data with the right date?

The top of the screen turns yellow when you are in Back Date mode.

To Exit, click the X.
How do you fix data if you enter it for the wrong EDA or Back Date mode?

- You don’t, it doesn’t really matter
- Re-enter the data with correct modes
- Switch a drop-down menu to the right project or a date field to the correct day
How do you fix data if you enter if for the wrong EDA or Back Date mode?

- You don’t, it doesn’t really matter
- Re-enter the data with correct modes
- Switch a drop-down menu to the right project or a date field to the correct day
Data Elements to Remember
Don’t forget NC County of Service!

**What**
The County in which a client receives your project’s services

**Collection Notes**
The location of shelter, housing or supportive services indicates the County of Service at any given time
Client Location

For Heads of Households: Which CoC is the $$ from?
Client Location

When would a client be served by our agencies/system, but not be in our CoC?

• Found housing in a different CoC
• Found a job in a different CoC (you meet with client in another CoC)
## Client Location

Scroll down to find Client Location at Entry Assessment

<table>
<thead>
<tr>
<th>Housing Status</th>
<th>Category 1 - Homeless (HUD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zip Code (of Last Permanent Address, if known)</td>
<td></td>
</tr>
</tbody>
</table>

*County and City of Residence refer to where the client is living the night before this assessment*

<table>
<thead>
<tr>
<th>County of Residence</th>
<th>Pasquotank</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Residence</td>
<td>Salisbury</td>
</tr>
</tbody>
</table>

**ANSWER Client Location for Head of Household only!**

| Client Location | NC-503 NC Balance of State CoC |

**Income and Non-Cash Benefit Information:**

| Income from Any Source | Yes (HUD) |

**Monthly Income**

<table>
<thead>
<tr>
<th>Monthly Amount</th>
<th>Source of Income</th>
<th>Receiving Income Source?</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other (HUD)</td>
<td>No</td>
<td></td>
<td>09/10/2018</td>
<td></td>
</tr>
</tbody>
</table>
# Client Location

Scroll down to find Client Location at Interims (Update or Annuals)

Currently fleeing should be indicated as "Yes" if the Person is fleeing, or is attempting to flee, the domestic violence situation or is afraid to return to their primary nighttime residence.

<table>
<thead>
<tr>
<th>If yes for Domestic Violence Victim/Survivor, are you currently fleeing?</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Select- ▼ G</td>
</tr>
</tbody>
</table>

****ANSWER Client Location for Head of Household only!**

<table>
<thead>
<tr>
<th>Client Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>NC-503 NC Balance of State CoC ▼ G</td>
</tr>
</tbody>
</table>

County of Service refers to the county in which the client is receiving services (only answer if instructed to by your System Administrator)

<table>
<thead>
<tr>
<th>NC County of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rowan ▼ G</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Connection with SOAR (PATH Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Select- ▼ G</td>
</tr>
</tbody>
</table>

**Client Contact Information**

<table>
<thead>
<tr>
<th>Is there a phone</th>
</tr>
</thead>
</table>
Room for Improvement: Missing Data

Data Collection methods

Which paper forms are used? (if not entering data directly)
Make sure to collect all required data elements based off the HMIS@NCCEH Assessments on ncceh.org/hmis/administrative

Who is trained to collect data?
Sometimes staff speaking to clients have not received training from their Agency Admin (or NCCEH) – make sure they know what to collect and why

Where does data collection take place?
Consider how the physical location of client interviews and corresponding forms impacts your ability to ask the right questions
Reason for Leaving

Why has this client’s project exit occurred?

Common Reasons for Leaving:

• *Completed program* is when a client leaves after moving into housing with support from the project.

• *Left for housing opp. before completing program* means that the client found other shelter or housing without support from the project.

• *Does not or no longer qualifies for the program* is used when the client can no longer use core services (financial or supportive) and is no longer eligible for the project.

• *Unknown/Disappeared* is used when project staff do not know the reason for leaving.
Reason for Leaving

Edit Exit Data - (15) Star, Skip

Household Members

To update Household members for this Exit Data, click the box beside each name.

(2) Child w/single parent
  (15) Star, Skip

Edit Exit Data - (15) Star, Skip

Exit Date *
09 / 16 / 2019

Reason for Leaving
-Select-
-Select-

If "Other", Specify
Completed program

Destination *
Criminal activity / violence
Death
Disagreement with rules/persons
Left for housing opp. before completing program
Needs could not be met
Does not or no longer qualifies for program
Non-compliance with program
Non-payment of rent
Other
Reached maximum time allowed
Unknown/Disappeared

Notes

Exit Destination

What
Identify where a client will stay immediately exiting a project

If Henrietta exits, where will she sleep that night?

Henrietta

Morning of 2/11/2018

Shelter?

Housing?

Outside?

Evening of 2/11/2018
Exit Destination

Collection Notes

Use multiple sources for a better understanding and more accurate data

If no information (after triangulating) is available, use No Exit Interview Completed
Exit Destination

Who
All clients

Data Collection Stage
At project exit

Special Reminder
Other will be considered incomplete
Keep a copy of our Exit Destination Guide available to consult
Missing data is always better than inaccurate data!
## Exit Destination

On the paper assessment

<table>
<thead>
<tr>
<th>DESTINATION – Where will the client be staying right after leaving this project?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Temporary Homeless</strong></td>
</tr>
<tr>
<td>□ Place not meant for habitation</td>
</tr>
<tr>
<td>□ Emergency shelter, including hotel or motel paid for with emergency shelter voucher</td>
</tr>
<tr>
<td>□ Moved from one HOPWA funded project To HOPWA TH</td>
</tr>
<tr>
<td>□ Transitional Housing for homeless persons (including homeless youth)</td>
</tr>
<tr>
<td><strong>Temporary Non Homeless</strong></td>
</tr>
<tr>
<td>□ Hotel or motel paid for without emergency shelter voucher</td>
</tr>
<tr>
<td>□ Residential project or halfway house with no homeless criteria</td>
</tr>
<tr>
<td>□ Staying or living with family, temporary tenure (room, apartment, or house)</td>
</tr>
<tr>
<td>□ Staying or living with friends, temporary tenure (room, apartment, or house)</td>
</tr>
<tr>
<td><strong>Institutional</strong></td>
</tr>
<tr>
<td>□ Psychiatric hospital or other psychiatric facility</td>
</tr>
<tr>
<td>□ Substance abuse treatment facility or detox center</td>
</tr>
<tr>
<td>□ Hospital or other residential non-psychiatric medical facility</td>
</tr>
<tr>
<td>□ Jail, prison, or juvenile detention facility</td>
</tr>
<tr>
<td>□ Foster care home or foster care group home</td>
</tr>
<tr>
<td>□ Long-term care facility or nursing home</td>
</tr>
</tbody>
</table>
## Exit Destination

### On the paper assessment

<table>
<thead>
<tr>
<th>Permanent</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Rental by client, with RRH or equivalent subsidy</td>
<td>□ Deceased</td>
</tr>
<tr>
<td>□ Permanent housing (other than RRH) for formerly homeless persons</td>
<td>□ Other</td>
</tr>
<tr>
<td>□ Moved from one HOPWA funded project to HOPWA PH</td>
<td>□ Client doesn’t know (CDK)</td>
</tr>
<tr>
<td>□ Rental by client, with GPD TIP housing subsidy</td>
<td>□ Client refused (CR)</td>
</tr>
<tr>
<td>□ Rental by client, with VASH housing subsidy</td>
<td>□ No exit interview completed (Data Not Collected, DNC)</td>
</tr>
<tr>
<td>□ Rental by client, with other ongoing housing subsidy</td>
<td></td>
</tr>
<tr>
<td>□ Owned by client, with other ongoing housing subsidy</td>
<td></td>
</tr>
<tr>
<td>□ Rental by client, no ongoing housing subsidy</td>
<td></td>
</tr>
<tr>
<td>□ Owned by client, no ongoing housing subsidy</td>
<td></td>
</tr>
<tr>
<td>□ Staying or living with family, permanent tenure</td>
<td></td>
</tr>
<tr>
<td>□ Staying or living with friends, permanent tenure</td>
<td></td>
</tr>
</tbody>
</table>
Exit Destination
Spotlight on HMIS Guides

Go to ncceh.org/hmis/trainings for Additional Resources:
What’s Next
### What’s Next Calendar

<table>
<thead>
<tr>
<th>Due</th>
<th>Report/Event Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 16(^{th})</td>
<td>Orange HMIS Users Meeting</td>
</tr>
</tbody>
</table>
| Oct 1\(^{st}\)    | Federal Fiscal Year Begins!  
                      | HUD HMIS Data Standards and HMIS Report updates                                    |
| Oct 21\(^{st}\)    | Orange HMIS Users Meeting                                                        |
| Nov 18\(^{th}\)    | Orange HMIS Users Meeting                                                        |
| TBA                      | Longitudinal System Analysis and System Performance Measures Reports              |
ncceh.org/hmis
access local support for NC Balance of State, Durham, & Orange CoCs
919.410.6997 or hmis@ncceh.org
helpdesk for local support