Orange CoC
HMIS Users Meeting

October 2019
Pre-Meeting Tip!

Case Management tool for Goals

• Case Plans and Goals provide a location for notes related to particular areas where clients are taking action
• Support Case Management and inter-agency communication
• Optional (not required by CoC or HUD)
Pre-Meeting Tip!

Case Management tool for Goals
Agenda

October 2019

System Updates
HMIS Data Standards 2020 Updates
Bed & Unit Inventory
ART report naming convention

How can we help?
Disabling Condition

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
FY2020 Data Standards

Did you see this update?
HMIS Update Email was sent 10/4

New Paper Data Collection Forms online

CoC-APR and ESG-CAPER are still not up to date in HMIS
Have your rooms or beds changed?

Prep for PIT/HIC and LSA federal reports

New potential dedicated beds for FY2020 Data Standards
  • Veteran Youth
  • Chronically homeless Youth
  • Any other youth

New or removed inventory
  • Is there a new building, wing, or money for hotel/motel shelter?
  • For tenant based or voucher programs, is there new financial capacity?
Bed & Unit Inventory changes

Specify the breakdown of your dedicated beds/rooms or add new beds!

Email the NCCEH Data Center with:

- Effective date for changes
- New total number of beds + rooms
- New total number of beds + rooms dedicated to
  - Adults with Children (Families)
  - Adults without Children (Singles) – specify gender
  - Veterans with Children (entire Family)
  - Veterans without Children (Singles)
  - Chronically Homeless Adults with Children (entire Family)
  - Chronically Homeless Adults without Children (Singles)
  - Youth (18-24) with Children
  - Youth (18-24) without Children
  - Children only (17 and under)
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

- Since Transition, custom reports (not created by WellSky) have new names!

<table>
<thead>
<tr>
<th>HMIS@NCCEH Gallery Naming Convention</th>
<th>Broad Category</th>
<th>Topics to include</th>
</tr>
</thead>
<tbody>
<tr>
<td>A001- infinity</td>
<td>Client Detail</td>
<td>Entry/exit reports, Count reports, Demographics reports, Data quality reports</td>
</tr>
<tr>
<td>B001- infinity</td>
<td>Care Coordination</td>
<td>By-name lists, VI-SPDAT reports, Chronic reports</td>
</tr>
<tr>
<td>C001- infinity</td>
<td>Outcome Reports</td>
<td>Outcomes</td>
</tr>
<tr>
<td>D001- infinity</td>
<td>Funder Reporting Aids</td>
<td>HUD reporting aids for PIT/HIC, LSA, SPM etc, other funder reports</td>
</tr>
<tr>
<td>E001- infinity</td>
<td>Audit</td>
<td>AA tools and Sys Admin Tools, provider page and user license reports</td>
</tr>
<tr>
<td>F001- infinity</td>
<td>Raw Exports</td>
<td>Raw reports</td>
</tr>
<tr>
<td>G001- infinity</td>
<td>Research and Data Requests</td>
<td>ongoing reports built for specific data/research purposes</td>
</tr>
</tbody>
</table>
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

• Since Transition, custom reports (not created by WellSky) have new names!

Can’t remember what report names mean?

Demographic and Data Quality reports with Client Detail
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

- Since Transition, custom reports (not created by WellSky) have new names!

Care Coordination such as VI-SPDAT and BNL reports
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

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![Outcomes Reports](image)
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

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Reports for Funders

Reports for Auditing
ART Report Naming Convention

HMIS@NCCEH Gallery folder in ART

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![Image of ART Gallery Reports and Resources]

### Raw Reports

- E008 - Provider Page by Date Added and Provider UID
- E009 - User License Summary
- E010 - HMIS User List with Last Login Date
- E012 - Provider Page Audit Report (additional tabs) - CoC Prompt
- E013 - Provider Page Audit Report with - By Provider Grp
- F001 - RAW Client Data Export v4_Clients with Entry-Exits
- F003 - RAW Client Entries Interims Exits By Provider Group C 1.1
- G001 - Opioid Action Plan Report V3

### Reports for Research
How can we help?
Collecting and Entering Disability Data
We have to get disability data right in HMIS!

Learn about the people in our system
What does our homeless population look like?
What types of disabilities do they have?
Helps identify chronically homeless clients

Improve our system to better serve clients
Connect eligible clients to disability benefits
What types of programs and/or services do they need?
Are these programs/services available in our community?

Report out about our system
Federal, State, Local, Agency
What is a disabling condition?

1. A physical, mental, emotional impairment, including an impairment caused by alcohol or drug abuse, PTSD, brain injury or chronic health issue that:

   - Is expected to be of long and indefinite duration, and
   - Substantially limits the client's ability to live on their own

2. A developmental disability

3. AIDS or HIV
So many numbers!

Disabling Condition definition has 3 criteria

If a client meets at least 1 of the 3 criteria, then YES, the client has a disabling condition
What does HUD want to know about disability?

1. Does the client have a disabling condition?
2. What type of disabling condition does the client have?
   a. Is the condition expected to be of long-continued and indefinite duration?
   b. Does the condition substantially impair the client’s ability to live independently?
   c. Is documentation of the disability and severity on file?
   d. Is the client currently receiving services/treatment for this disability?
What is documentation+ what counts?

**Note** - Only projects that receive funding with eligibility criteria that require documentation of the disabling condition should require documentation.

<table>
<thead>
<tr>
<th>Source</th>
<th>Evidence needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensed professional</td>
<td>Written document to verify disability and certify that the disability is expected to be long-continuing or of indefinite duration and substantially impedes the individual’s ability to live independently; Professional must be licensed by state of NC to diagnose and treat the disability</td>
</tr>
<tr>
<td>Social Security Administration</td>
<td>Written verification of disability or the receipt of a disability check (SSDI)</td>
</tr>
<tr>
<td>VA (or other federal agency)</td>
<td>Receipt of a disability check</td>
</tr>
<tr>
<td>HUD</td>
<td>Other approved documentation</td>
</tr>
<tr>
<td>Intake staff</td>
<td>Written observation of disability that, no later than 45 days of the application for assistance is confirmed and accompanied by evidence (as listed above)</td>
</tr>
</tbody>
</table>
Before we go further, let’s check in

Do you have any questions?

**Review Questions**
Why is HMIS disability data important?

Can you define disabling condition?

How many criteria does a client need to meet to be identified as having a disabling condition?
Disability Data in NC HMIS
Disability data is entered in 3 places:

- Project Entry
- Interim Update
- Interim Annual Assessment
- Project Exit
Disability questions in HMIS

Part 1-
A general question

Disability Status

Does the client have a disabling condition? -Select-

Part 2-
The disability sub-assessment

Disabilities

<table>
<thead>
<tr>
<th>Disability Type *</th>
<th>Disability determination *</th>
<th>Start Date *</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

HUD Verification
Part 1 is called the Gateway Question

<table>
<thead>
<tr>
<th>Disability Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the client have a disabling condition?</td>
</tr>
<tr>
<td>- Select -</td>
</tr>
<tr>
<td>Yes (HUD)</td>
</tr>
<tr>
<td>No (HUD)</td>
</tr>
<tr>
<td>Client doesn't know (HUD)</td>
</tr>
<tr>
<td>Client refused (HUD)</td>
</tr>
<tr>
<td>Data not collected (HUD)</td>
</tr>
</tbody>
</table>
Disability questions in HMIS

Part 1 -
A general question

Disability Status
Does the client have a disabling condition?
Yes (HUD)

Part 2 -
The disability sub-assessment

<table>
<thead>
<tr>
<th>Disabilities</th>
<th>HUD Verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability Type</td>
<td>Disability determination</td>
</tr>
<tr>
<td>Add</td>
<td></td>
</tr>
</tbody>
</table>
The sub-assessment collects detailed disability data
This is where things get a bit weird...

Remember our criteria for disabling condition?
In order to collect the most accurate data for Part 1

**Disability Status**

Does the client have a disabling condition? [Select]

We need to ask the criteria questions in Part 2

**Disabilities**

<table>
<thead>
<tr>
<th>Disability Type*</th>
<th>[Select]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability determination*</td>
<td>[Select]</td>
</tr>
<tr>
<td>If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently</td>
<td>[Select]</td>
</tr>
</tbody>
</table>
When to answer “Yes”

Only answer yes here if:

The client’s disability type fits within HUD’s disabling condition definition

The client answers **yes** here

*unless disability type is Developmental or HIV/AIDS
Working with Clients
Collecting disability data in 4 steps!

1. Discuss disability definition with the client (3 criteria)
2. Work with the client to determine if they meet disability criteria
3. Ask if the disability has been documented or can be verified
The next few questions are about Disabling Conditions. This is to help our agency find resources that match your needs. Is that ok?

Yes.
Defining disabling condition

For this conversation, a disabling condition is something that will last a long time, maybe your whole life, and makes it hard to live on your own. Do you have a condition that might last forever and make it hard to keep housing?
Explaining disability type

When it comes to disabling conditions, we view them in these categories: Physical, Chronic Health Condition, HIV/AIDS, Developmental, Alcohol Abuse, Drug Abuse, Both Alcohol and Drug Abuse, and Mental Health Problem.
Gather information about disability type

Do you have any conditions that fit into any of the disability categories I listed?

Yes - I have a Mental Health Problem
Confirm disability meets HUD’s definition

Thank you for sharing that with me. Is your Mental Health Problem expected to be of long and indefinite duration and does it impair your ability to live independently?

Yes, it is indefinite and impairs my ability to live independently.
Has someone like a doctor or other professional verified that you have this disability? If so, is there a document you can share for our records?

No, it has not been documented.
That’s okay! Documentation can help prove your eligibility for some housing projects. But it is not needed for our program right now.

Ok, I might need help with that.
### What did we learn from the client?

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability Type</td>
<td>Mental Health Problem</td>
</tr>
<tr>
<td>Expected to be of long duration and indefinite and substantially impair ability to live independently?</td>
<td>YES</td>
</tr>
<tr>
<td>Does the client have a disabling condition?</td>
<td>YES (based on the responses above)</td>
</tr>
<tr>
<td>Documentation of disability and severity on file?</td>
<td>NO (not required for HMIS data entry)</td>
</tr>
</tbody>
</table>
HMIS Disability Data Entry

Based on scenario from previous section
Indicate client has a disability in HMIS

Disability Status

- Does the client have a disabling condition?

- Select-
  - Select-
  - Yes (HUD)
  - No (HUD)
  - Client doesn't know (HUD)
  - Client refused (HUD)
  - Data not collected (HUD)
Select type of disability in HMIS

1. Add

2. Mental Health Problem (HUD)
Enter Start Date = Date information collected

<table>
<thead>
<tr>
<th>Start Date *</th>
<th>08 / 21 / 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td></td>
</tr>
</tbody>
</table>

If we collected the info today, we should set the start date to today’s date.

We leave this blank because we cannot predict the future.
Confirm the specific disability

If the client has this disability type, set this to “Yes”

The answer here should match response to the gateway question
Save the disability data in HMIS

Click this button if client has more than one disability
HUD Verification
HUD verification matters

<table>
<thead>
<tr>
<th>Disability Status</th>
<th>HUD Verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the client have a disabling condition?</td>
<td>Yes (HUD)</td>
</tr>
</tbody>
</table>

**Disabilities**

<table>
<thead>
<tr>
<th>Disability Type (HUD)</th>
<th>Disability determination (HUD)</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental Health Problem (HUD)</td>
<td>Yes (HUD)</td>
<td>08/21/2018</td>
<td></td>
</tr>
</tbody>
</table>

**Showing 1-1 of 1**
HUD Verification Alerters - green is good

<table>
<thead>
<tr>
<th>Alerter</th>
<th>HUD Verification Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Incomplete]</td>
<td>Incomplete</td>
</tr>
<tr>
<td>![Complete]</td>
<td>Complete</td>
</tr>
</tbody>
</table>
We were able to determine that our client only had a disabling mental health problem.
**Complete HUD Verification**

### Disability Status

Does the client have a disabling condition?  
Yes (HUD) ⬇️

### Disabilities

<table>
<thead>
<tr>
<th>Disability Type</th>
<th>Disability determination</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIV/AIDS (HUD)</td>
<td>No (HUD)</td>
<td>08/21/2018</td>
<td></td>
</tr>
<tr>
<td>Physical (HUD)</td>
<td>No (HUD)</td>
<td>08/21/2018</td>
<td></td>
</tr>
<tr>
<td>Mental Health Problem (HUD)</td>
<td>Yes (HUD)</td>
<td>08/21/2018</td>
<td></td>
</tr>
</tbody>
</table>

Showing 6-8 of 8

[Add] [First] [Previous] [Next] [Last]
Disability Data quality

Two of the most common errors
Potential disability data entry errors- Missing

Selecting “Yes” to indicate a client has a disability but no disabilities are entered
Potential disability data entry errors - Conflict

Selecting “No” to indicate that a client does not have a disability but adding a disability type in the sub-assessment.
Locate these errors using the 0640 report

The 0640 HUD Data Quality Framework is located in ART

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Error Count</th>
<th>% of Error Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veteran Status (3.7)</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Project Entry Date (3.10)</td>
<td>1</td>
<td>0.23%</td>
</tr>
<tr>
<td>Relationship to Head of Household (3.15)</td>
<td>7</td>
<td>1.62%</td>
</tr>
<tr>
<td>Client Location (3.16)</td>
<td>2</td>
<td>0.65%</td>
</tr>
<tr>
<td>Disabling Condition (3.8)</td>
<td>8</td>
<td>1.86%</td>
</tr>
<tr>
<td>Destination (3.12)</td>
<td>88</td>
<td>36.67%</td>
</tr>
</tbody>
</table>

Missing and inconsistent data will be aggregated here. Another tab details who these clients are.
Or locate these errors using the CoC-APR and ESG-CAPER reports

Dashboard reports can be found in the “Reports” menu on the left-hand side

### 6a - Data Quality: Personally Identifiable Information

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Client Doesn’t Know/Client Refused</th>
<th>Information Missing</th>
<th>Data Issues</th>
<th>% of Error Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name (3.1)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>SSN (3.2)</td>
<td>13</td>
<td>5</td>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>Date of Birth (3.3)</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1%</td>
</tr>
<tr>
<td>Race (3.4)</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>2%</td>
</tr>
<tr>
<td>Ethnicity (3.5)</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1%</td>
</tr>
<tr>
<td>Gender (3.6)</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Overall Score</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>12%</strong></td>
</tr>
</tbody>
</table>

### 6b - Data Quality: Universal Data Elements

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Error Count</th>
<th>% of Error Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veteran Status (3.7)</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Project Start Date (3.10)</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Relationship to Head of Household (3.15)</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Client Location (3.16)</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Disabling Condition (3.8)</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

Missing and inconsistent data will be aggregated here. Select the **blue** number for client details.
## What’s Next Calendar

<table>
<thead>
<tr>
<th>Due</th>
<th>Report/Event Name</th>
</tr>
</thead>
</table>
| Oct 1<sup>st</sup> | Federal Fiscal Year Begins!  
HUD HMIS Data Standards and HMIS Report updates                                  |
| Oct 21<sup>st</sup> | Orange CoC HMIS Users Meeting                                                    |
| Nov 1<sup>st</sup>  | HMIS@NCCEH Training Site Refresh                                                 |
| Nov 18<sup>th</sup>| Orange CoC HMIS Users Meeting                                                    |
| October - February | System Performance Measures Reports                                              |
Contact NCCEH
hello@ncceh.org
919.755.4393

Contact NCCEH Data Center Help Desk
hmis@ncceh.org
919.410.6997