

HMIS@NCCEH

Orange CoC HMIS Users Meeting

November 2020



**NC COALITION^{to}
HOMELESSNESS**

Agenda

November 2020

System Updates

Annual Privacy Training

CE Elements: Training, workflow, & new paper forms

How can we help

LSA corrections

Avoid big scary correction lists

Adding new clients to entries – aka BABIES!

What's Next?



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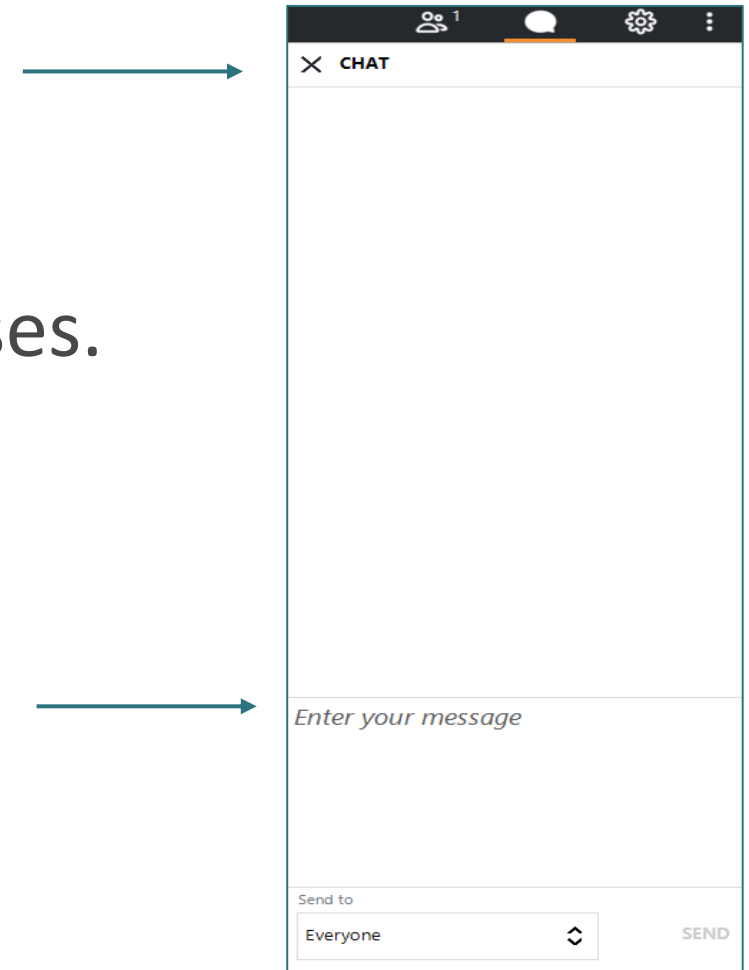
Welcome

Reminders

Your line is muted.

We will unmute the line during Q&A pauses.

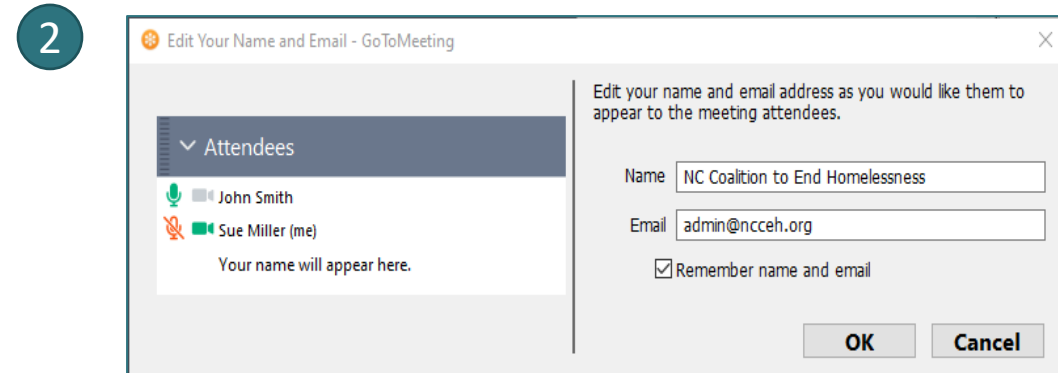
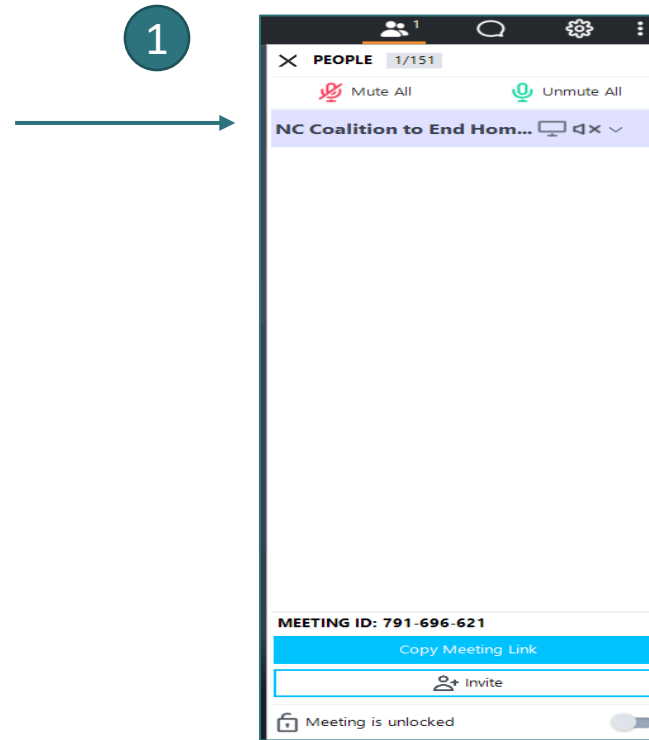
The chat box is available to use anytime.



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Who is here?

- Enter your full names, so we know who attended and who asks questions
- If multiple folks are watching at once, use a combo name like, “Andrea Carey and Andy Phillips – the Ands”



The background of the image is a solid teal color, overlaid with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, multi-story apartment blocks, and industrial-style structures, as well as some stylized trees. The pattern is dense and covers the entire background.

System Updates

Annual Privacy Training

- We finished our Annual Privacy Training on Oct. 6th
- 86% took the quiz and passed!!!
- If you didn't take your quiz, you were notified via a HelpDesk ticket
 - Your HMIS license was also inactivated, allowing no access to HMIS
- Agency Admins please check in with your users to see if they completed

The background of the slide is a solid teal color, overlaid with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, multi-story apartment buildings, and industrial structures like factories with smokestacks. Some icons also include small trees or clouds. The pattern is dense and covers the entire background.

CE Data Elements

New Coordinated Entry Data Elements



New Paper Assessments

- Paper forms for all projects
- Now posted:
ncceh.org/hmis/admin
- ESG forms have also been updated



New Coordinated Entry Data Elements

Project Type	CE Assessment	CE Event	Current Living Situation
HUD SSO-CE	Yes	Yes	Yes
Other CE BNLs	BoS + Orange only	BoS + Orange only	BoS + Orange only
SSO	BoS + Orange only	BoS + Orange only	BoS + Orange only
SO	BoS + Orange only	BoS + Orange only	Yes
ES	BoS + Orange only	BoS + Orange only	N/A
TH	BoS + Orange only	BoS + Orange only	N/A
RRH	VA projects in BoS + Orange only	BoS + Orange only	N/A
PSH	VA projects in BoS + Orange only	BoS + Orange only	N/A



Coordinated Entry Assessment



What

Collects an assessment's date, location, and result

Collection Notes

All HP/Diversion and CE access points required to collect

Assessment Level is either Crisis Needs (immediate emergency) or Housing Needs (stabilization)

Prioritization Status refers to whether the client is placed on the By Name List for housing resources

Coordinated Entry Assessment



Who

Heads of Households



Data Collection Stage

At client's Project Start, Interim, Exit



Special Reminder

This is a record of the Assessment occurring

Does not replace data entry for the detailed responses to the assessment, like entering the VI-SPDAT in HMIS

Use the same date for “Start,” “Information,” and “End” Date



Coordinated Entry Assessment

On the paper assessment

COORDINATED ENTRY ASSESSMENT														
DATE OF ASSESSMENT							/			/				
ASSESSMENT LOCATION														
Orange CoC	<input type="checkbox"/> CEF													
	<input type="checkbox"/> Housing Helpline													
	<input type="checkbox"/> HomeLink													
	<input type="checkbox"/> IFC Commons													
	<input type="checkbox"/> Jail													
	<input type="checkbox"/> Medical Provider													
	<input type="checkbox"/> Outreach													
	<input type="checkbox"/> Shelter													

Coordinated Entry Assessment

On the paper assessment

BoS CoC	<input type="checkbox"/> Region 1
	<input type="checkbox"/> Region 2
	<input type="checkbox"/> Region 3
	<input type="checkbox"/> Region 4
	<input type="checkbox"/> Region 5
	<input type="checkbox"/> Region 6
	<input type="checkbox"/> Region 7
	<input type="checkbox"/> Region 8
	<input type="checkbox"/> Region 9
	<input type="checkbox"/> Region 10
	<input type="checkbox"/> Region 11
	<input type="checkbox"/> Region 12
	<input type="checkbox"/> Region 13

Coordinated Entry Assessment

On the paper assessment

ASSESSMENT TYPE	<input type="checkbox"/> Phone
	<input type="checkbox"/> In Person
	<input type="checkbox"/> Virtual
ASSESSMENT LEVEL	<input type="checkbox"/> Crisis Needs Assessment
	<input type="checkbox"/> Housing Needs Assessment
PRIORITIZATION STATUS	<input type="checkbox"/> Placed on Prioritization List
	<input type="checkbox"/> Not Placed on Prioritization List

Demo Coordinated Entry Assessment in HMIS!

When entering data, always remember:

- Are you in the right Enter Data As mode? (default or manual)
- Are you using the right Date? (backdate or not?)
- Are you adding info at the right stage? (Start, Interim, Exit)



Summary and Questions

- Which projects?
 - CE Assessment: HP, Diversion, CE access points (if you do a VI-SPDAT..)
- When?
 - CE Assessment: when the Crisis or Housing assessment occurs
- Which clients?
 - CE Assessment: Heads of Households



Coordinated Entry Event



What

Collects key referral, placement, and referral result events

Collection Notes

Includes Date and Event Type

All CE referral partners required to collect this element

CE Events may need to be updated over time until resolved

- If referral for permanent housing projects, result and date are recorded too



Coordinated Entry Event



Who

Heads of Households



Data Collection Stage

At client's Project Start, Interim, Exit



Special Reminder

Follow the conditional logic, if answer is ____, then ____.
Use the same date for "Start," "Information," and "End"
Date



Coordinated Entry Event

On the paper assessment

COORDINATED ENTRY EVENT														
START DATE / DATE OF EVENT							/			/				
EVENT														
Access Events	<input type="checkbox"/> Referral to Prevention Assistance project													
	<input type="checkbox"/> Problem Solving/Diversion/Rapid Resolution										→ Go to A			
	<input type="checkbox"/> Referral to scheduled Coordinated Entry Crisis Needs Assessment													
	<input type="checkbox"/> Referral to scheduled Coordinated Entry Housing Needs Assessment										→ Go to B			
	<input type="checkbox"/> Referral to post-placement/follow-up case management													
	<input type="checkbox"/> Referral to Street Outreach project or services													
	<input type="checkbox"/> Referral to Housing Navigation project or services													
	<input type="checkbox"/> Referral to Non-continuum services: Ineligible for continuum services													
	<input type="checkbox"/> Referral to Non-continuum services: No availability in continuum services													

Coordinated Entry Event

EVENT		
Access Events	<input type="checkbox"/> Referral to Prevention Assistance project	
	<input type="checkbox"/> Problem Solving/Diversion/Rapid Resolution	→ Go to A
	<input type="checkbox"/> Referral to scheduled Coordinated Entry Crisis Needs Assessment	
	<input type="checkbox"/> Referral to scheduled Coordinated Entry Housing Needs Assessment	→ Go to B
Referral Events	<input type="checkbox"/> Referral to post-placement/follow-up case management	
	<input type="checkbox"/> Referral to Street Outreach project or services	
	<input type="checkbox"/> Referral to Housing Navigation project or services	
	<input type="checkbox"/> Referral to Non-continuum services: Ineligible for continuum services	
	<input type="checkbox"/> Referral to Non-continuum services: No availability in continuum services	
	<input type="checkbox"/> Referral to Emergency Shelter bed opening	→ Go to C
	<input type="checkbox"/> Referral to Transitional Housing bed/unit opening	
	<input type="checkbox"/> Referral to Joint TH-RRH project/unit/resource opening	
	<input type="checkbox"/> Referral to RRH project resource opening	
	<input type="checkbox"/> Referral to PSH project resource opening	
	<input type="checkbox"/> Referral to Other PH project/unit/resource opening	



Coordinated Entry Event

On the paper assessment

<input type="checkbox"/> Referral to Other PH project/unit/resource opening										
If 'Event' answer was 'Problem Solving/Diversion/Rapid Re-Housing intervention or service result', please answer the following question:										
A. Problem Solving/Diversion/Rapid Resolution intervention or service result – Client housed/re-housed in a safe alternative?					<input type="checkbox"/> Yes			<input type="checkbox"/> No		
If 'Event' answer was 'Referral to post-placement/follow-up case management result', please answer the following question:										
B. Referral to post-placement/follow-up case management result – Enrolled in Aftercare project?					<input type="checkbox"/> Yes			<input type="checkbox"/> No		
If 'Event' answer was Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following questions										
C. Location of Crisis Housing or Permanent Housing Referral (project name)										
D. Referral Result (if applicable)					<input type="checkbox"/> Client accepted		<input type="checkbox"/> Client rejected		<input type="checkbox"/> Provider rejected	
E. Date of Result (if applicable)							/			/



Demo Coordinated Entry Event in HMIS!

When entering data, always remember:

- Are you in the right Enter Data As mode? (default or manual)
- Are you using the right Date? (backdate or not?)
- Are you adding info at the right stage? (Start, Interim, Exit)



Summary and Questions

- Which projects?
 - CE Event: CE referral partners (HP, Diversion, CE access points, Crisis and PH providers)
- When?
 - CE Event: when a qualifying event occurs
- Which clients?
 - CE Event: Heads of Households



How can we help?

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LSA Report Corrections

LSA Reporting Correction Waves

Wave: Due Date	Time Period	Data Corrections Included
Wave 1: Due 09/25	09/14 - 25	<ul style="list-style-type: none">• Data quality/completeness (demographics, homeless history, UDE's, etc.)
Wave 2: Due 10/09	09/30 – 10/09	<ul style="list-style-type: none">• All outstanding corrections from Wave 1• Locations (Client Location and NC County of Service)
Wave 3: Due 10/23	10/14 - 23	<ul style="list-style-type: none">• All outstanding corrections from Waves 1 & 2• Long stayers, Returns, and Annual Assessment errors



Orange Corrections!

Issues Identified: 286

Issues Confirmed: 105

Issues Corrected: 176



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Report Corrections FAQs

How often should agencies expect updates?

- Once a week

What are we expecting from agencies?

- List of client issues reviewed or corrected

What are the possible responses to a list of corrections?

- It's corrected! (yay!)
- I cannot correct it. (confirmed)
- It looks correct when I look at this.



How to avoid BIG SCARY Correction lists



Review reports in internal staff meetings



Review in leadership meetings



At least monthly and quarterly reviews



Run more frequent DQ reports when you have new users



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BABIES

Or, how to add a new client to an
existing entry

Adding new clients to entries – aka BABIES

Remember:

- Date of Birth and Relationship to Head of Household designations are important to reporting and determining household composition.
- Review the [Data Standards Training on Demographics](#) for more on how and why we collect these elements.

Impact:

- Relationship to Head of Household and Age determines how and which clients and families are included in HUD's Longitudinal Systems Analysis.



Adding new clients to entries – aka BABIES

Basic Steps:

1. Determine the child's Head of Household
2. Add the child to the Household
3. Add the child to the Project Start

**KEEP
CALM
IT'S AS EASY AS
1, 2, 3**



Adding new clients to entries – aka BABIES

Determine the child's Head of Household:

1. Pull the client's paper file
2. Determine the child's Head of Household (specifically the client ID)

Client - (4) Solo, Han



(4) Solo, Han



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What's the right date?

HUD has specific rules for newborn baby start dates

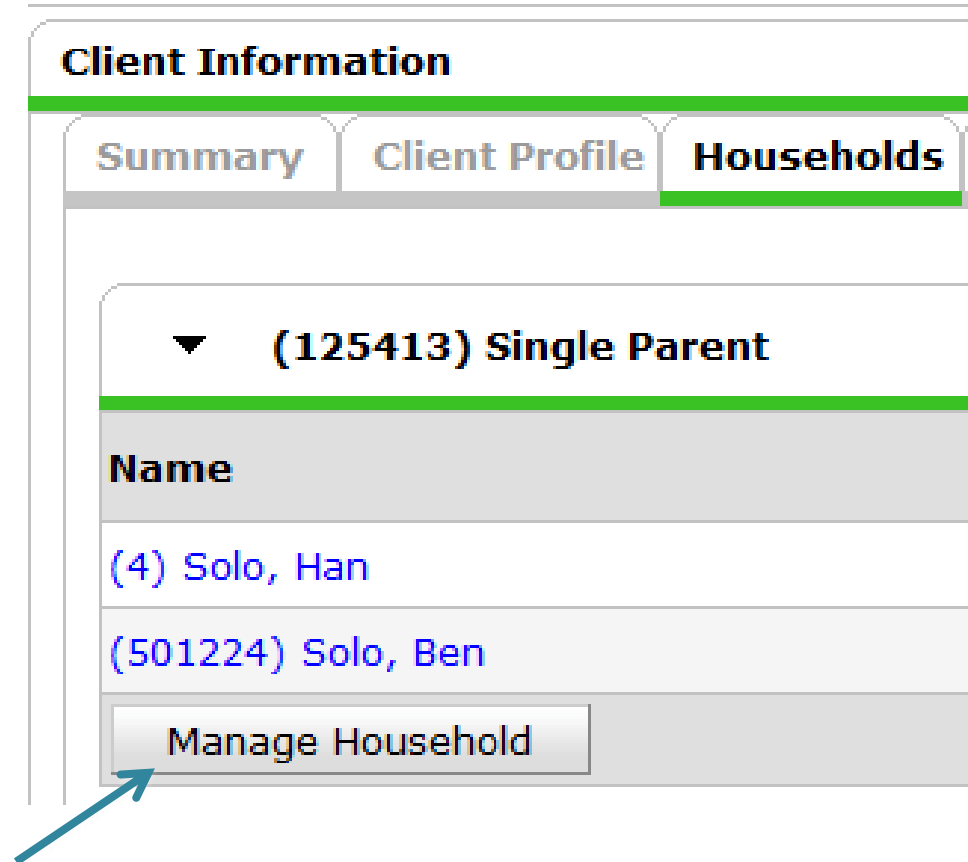
- Project Start Date (your backdate for this process) is when you started serving the child
- Project Start Date cannot equal baby's Date Of Birth



Adding new clients to entries – aka BABIES

Add the child to the Household:

1. Check your default EDA mode; if not your household's project, manually change EDA mode
2. Set the Back Date mode
3. Go to the Head of Household's profile
4. Click their Household tab
5. Click Manage Household



Client Information

Summary Client Profile **Households**

▼ **(125413) Single Parent**

Name

(4) Solo, Han



(501224) Solo, Ben

Manage Household

Adding new clients to entries – aka BABIES

Add the child to the Household:

6. Click Add/Delete Household Members for more detail


Household Members				
	Name	Age	Head of Household	Relationship to Head of Household
	(4) Solo, Han	42	Yes ▾	Self ▾
	(501224) Solo, Ben	21	No ▾	son ▾
<div>Add/Delete Household Members</div>				



Adding new clients to entries – aka BABIES

Add the child to the Household:


6. Open the Add Clients section by clicking the black arrow
7. Now you have a search area to find an existing client ID or add a new profile to HMIS



▶ **Add Clients to the Household**

▼ **Add Clients to the Household**

Client Search

 Please Search the System before adding a New Client


Name	First	Middle	Last
	<input type="text"/>	<input type="text"/>	<input type="text" value="Solo"/>
Name Data Quality	<input type="text" value="-Select-"/>		
Alias	<input type="text"/>		




Adding new clients to entries – aka BABIES

Add the child to the Household:

8. If you find an existing client ID, use the green plus sign icon to add client to the household
9. If you must create the profile, follow the same steps as any other new client.
 - a) Search
 - b) Add all known info
 - c) Click Add New Client with this information

Client Results				
	ID	Name	Social Security Number	Date of Birth
	482624	test, dad		1990
				Showin




Adding new clients to entries – aka BABIES

Add the child to the Household:

10. Your new household member will appear under Selected Clients

11. Click Continue

Selected Clients				
	ID	Name	Social Security Number	Date of Birth
	482624	test, dad		1990
				Show



Remove client if you made a mistake



Adding new clients to entries – aka BABIES

Add the child to the Household:

11. Confirm the three questions for your new household member:

- a) Head of Household
- b) Relationship to HoH
- c) Joined Household Date

★ Make sure **Joined Household Date matches** the head of household's Start Date

Household Members					
	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *
⊖	(4) Solo, Han	42	Yes ▾	Self ▾	01 / 20 / 2019
⊖	(501224) Solo, Ben	21	No ▾	son ▾	01 / 20 / 2019
⊖	(482624) test, dad		No ▾	-Select- ▾	10 / 12 / 2020
Add/Delete Household Members					

12. Save & Exit

Adding new clients to entries – aka BABIES


Add the demographics for the child (if needed):


1. Click new client's name
2. Go to the Client Profile Tab
3. Click the pencil to edit
4. Save changes
5. Go back to the Head of Household's profile

▼ (125413) Single Parent


Name	Age
(4) Solo, Han	42
(501224) Solo, Ben	21
(482624) test, dad	

Manage Household



 **Client Demographics**



Date of Birth
Date of Birth Type
Gender
Primary Race

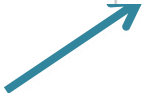


Adding new clients to entries – aka BABIES

Add the child to the correct entry:

1. Click the Head of Household's Entry/Exit tab
2. Click the pencil next to the Start Date that should include the child.

Entry / Exit			
	Program	Type	Project Start Date
	Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)	HUD	 09/23/2020



Adding new clients to entries – aka BABIES

Add the child to the correct entry:

3. Click Include Additional Household Members
4. Check the new client
5. Click Continue
6. Save & Continue *without changing the start date*

ata - (4) Solo, Han

ers

ers were originally associated.

Include Additional Household Members

t Data - (4) Solo, Han

Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)









HUD

* 09 / 23 / 2020 23:03:19 PM

Adding new clients to entries – aka BABIES

Add the child to the correct entry:

7. Find your new client in the Household table
8. Click the pencil next to their start date

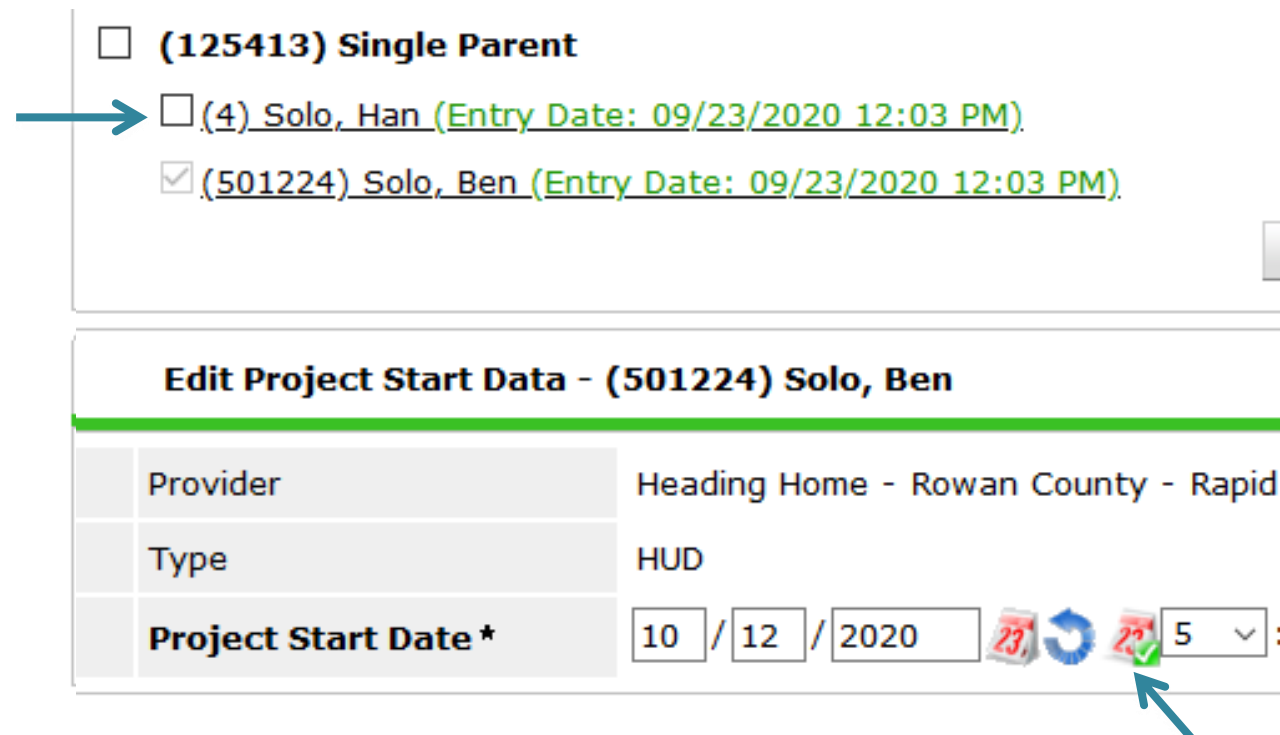
Household Members Associated with this Entry / Exit							
		Name	Head of Household		Project Start Date		Exit Date
		(4) Solo, Han	Yes		09/23/2020		09/27/2020
		(501224) Solo, Ben	No		09/23/2020		
Include Additional Household Members							



Adding new clients to entries – aka BABIES

Add the child to the correct entry:

9. Now un-check the other household members so it's just the new client
10. Change the Start Date to your Back Date mode (green check)
11. Save & Continue
12. Complete the assessment as usual!



☐ **(125413) Single Parent**

☐ **(4) Solo, Han** (Entry Date: 09/23/2020 12:03 PM)

☒ **(501224) Solo, Ben** (Entry Date: 09/23/2020 12:03 PM)

Edit Project Start Data - (501224) Solo, Ben

Provider	Heading Home - Rowan County - Rapid							
Type	HUD							
Project Start Date *	10	/	12	/	2020	23	5	▼



 What's Next?

HMIS Monthly Checklist

- ☐ Have you run a report on last months data?
- ☐ Have you made your corrections for last month's data?
- ☐ Have you looked at the data as a team?
- ☐ Have you made a program decision based on data?
- ☐ Do you have enough paper ROIs for the next month?
- ☐ Have you checked for Annual Assessments coming due?



What's Next Calendar

Due	Reporting Dates
October	First quarterly ESG-CV Reports Deadline
November	Both FY19 and FY20 LSA Deadline
December	HUD reviews LSA and sends corrections to CoCs
January 27, 2021	PIT Night!
March	FY20 SPMs Deadline

When should our next HMIS Users Meeting be?

December 17th?



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Contact NCCEH

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NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Center Help Desk

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