The Community Partnership
For The Prevention
of Homelessness

HMIS Training

DC 102: FAMILIES ENTRY/EXIT WORKFLOW

Agenda

- HMIS Basics
- Introduction to ClientPoint
- The Entry/Exit Workflow
- What does entry mean for my project type?
- Creating a new client
- Completing Client Profile information
- Creating a household
- Creating an entry
- Entry Assessment
- Exiting a client
- Exiting a household
- Common Data Entry Errors
- Additional Resources

HMIS Basics

- DC’s HMIS
- Visibility Basics
- Data Security

What is HMIS?

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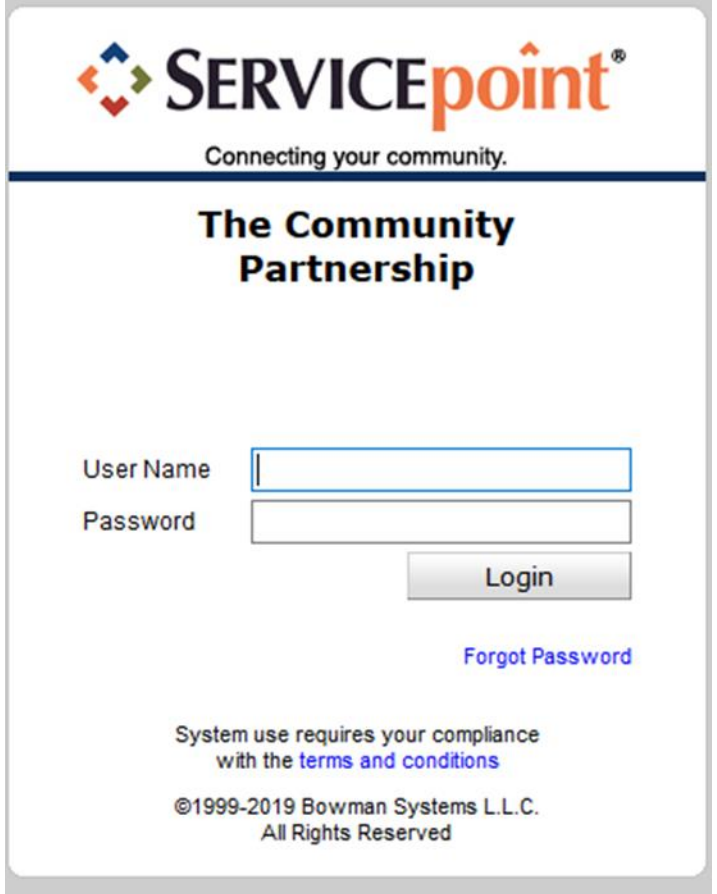
- Homeless Management Information System
- Tool required by funders of homeless services providers
- Way to keep track of services, case plans, assessments, and housing for clients
- Way for community to learn of system flow and cracks in our homeless response system
- This is all thanks to YOU for completing accurate and timely data entry for the clients you serve!

ServicePoint – DC's HMIS Software



SERVICEpoint®

Connecting your community.

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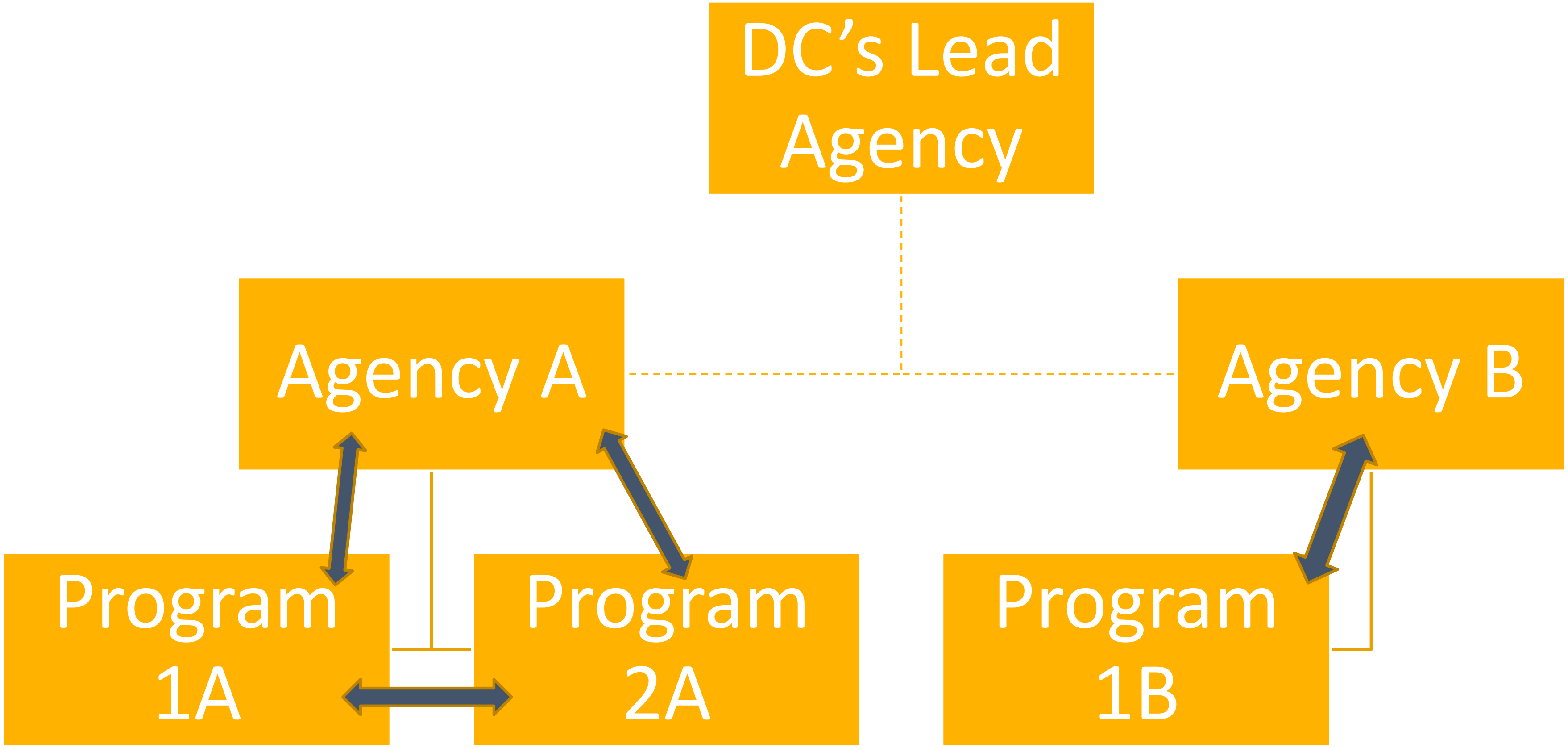
System use requires your compliance with the terms and conditions

Who Can See What?

Visibility and Data Security

- The database contains hundreds of thousand client files, each with dozens of project stays, services, and case notes.
- Having a visibility structure is important to ensure client information is protected, while also ensuring agencies and programs are able to work together to help clients.
- Client choice to share their program level information is at the heart of our visibility structure.

Visibility Basics – Current Structure



DC's Lead Agency

Agency A

Agency B

Program 1A

Program 2A

Program 1B

HUD UDEs – What's Shared & What Isn't

UNIVERSAL IDENTIFIERS (ONE ANSWER PER CLIENT RECORD)

- Name
- Name Data Quality
- Social Security Number
- Social Security Number Data Quality
- Date of Birth
- Date of Birth Data Quality
- Race
- Ethnicity
- Gender
- Veteran Status

UNIVERSAL PROJECT STAY ELEMENTS (ONE OR MORE VALUES PER PROJECT STAY)

- Disabling Condition (Yes/No)
- Project Start Date
- Project Exit Date
- Destination
- Relationship to Head of Household
- Client Location
- Housing Move in Date (for RRH and Permanent Housing projects)
- Prior Living Situation

Family Shelter, Outreach, and Prevention

- This is a group of programs that are sharing client program data amongst themselves
  - Release of information (ROI) signed at Virginia Williams allows this to happen.

- ALL Client data created by these programs are shared with the other programs
  - AS LONG AS the information is tagged as coming from one of the following programs.
  - If it is coming from a different program (even within an Agency that has one of those programs) it will not be shared per the agreement of the ROI.

- Temporary Shelters for Families
- Overflow motels/hotels for Families
- Virginia Williams
- Homeless Prevention Programs for Families
- Short Term Family Shelters

CAHP Data Sharing

- This is a group of programs that are sharing client CAHP data amongst themselves
  - Release of information (ROI) signed at beginning of CAHP assessment process
- ALL Client data created by these programs are shared with the other programs
  - AS LONG AS the information is tagged as coming from one of the following programs.
  - If it is coming from a different program (even within an Agency that has one of those programs) it will not be shared per the agreement of the ROI.

- “Agency Name/Acronym - Coordinated Entry for ADULT Single Individuals”
- “Agency Name/Acronym - Coordinated Entry for YOUTH Single Individuals”

Coming Soon: Universal ROIs

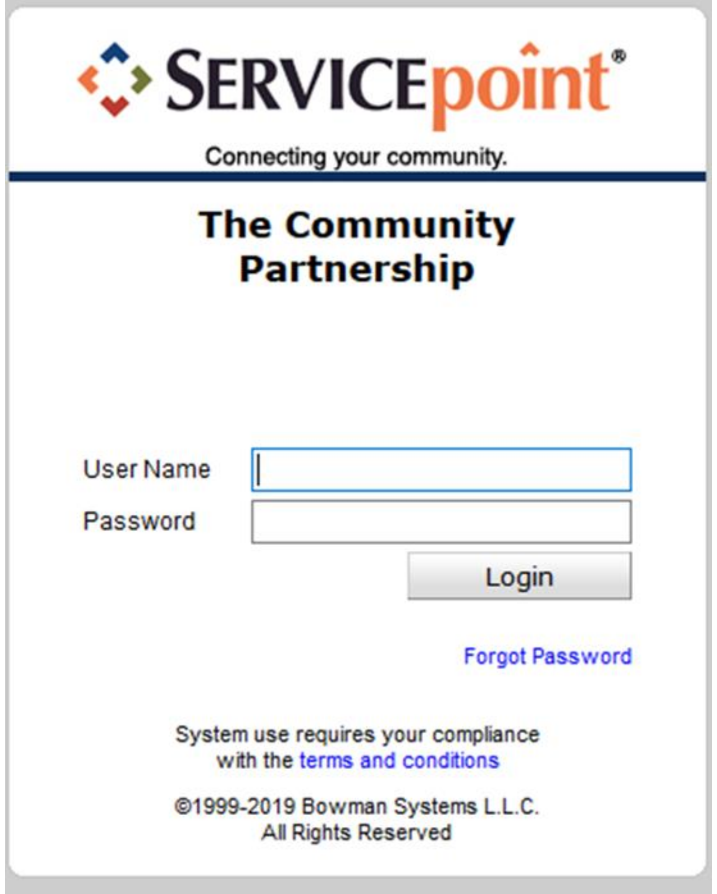
- There is not currently a standard ROI for the CoC but that is being worked on.
- Once more information is available we will update you all on this new document, and the processes involved.

Data Security

- Keeping client information safe and secure begins with YOU!
- Do not let others log in as you.
  - Keep your user name and password to yourself.
  - Do not keep it posted anywhere others can see
- Do not leave your computer unattended while logged into ServicePoint.
- Do not save your login information with your web browser.
- Do not send client identifying information via unencrypted emails (including to the helpdesk!)
  - Client Identifying information includes:
    - Name
    - Date of Birth
    - Social Security Number

Logging In

Training site:
https://sp5.servicept.com/washdc_demo/



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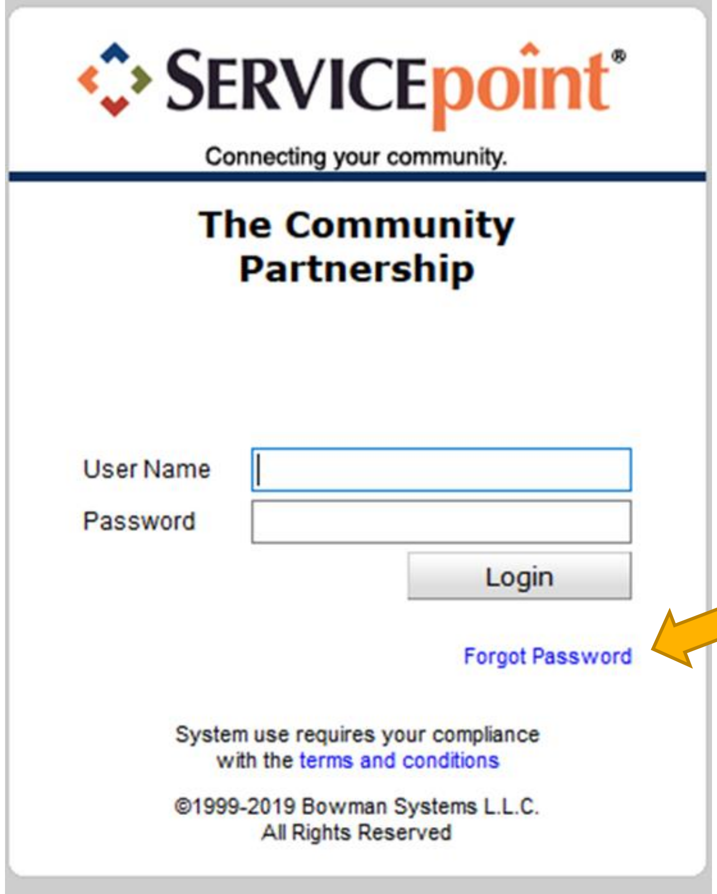
Live site:
https://washdc.servicept.com

Logging In

Training site:
https://sp5.servicept.com/washdc_demo/

Forgot your password?



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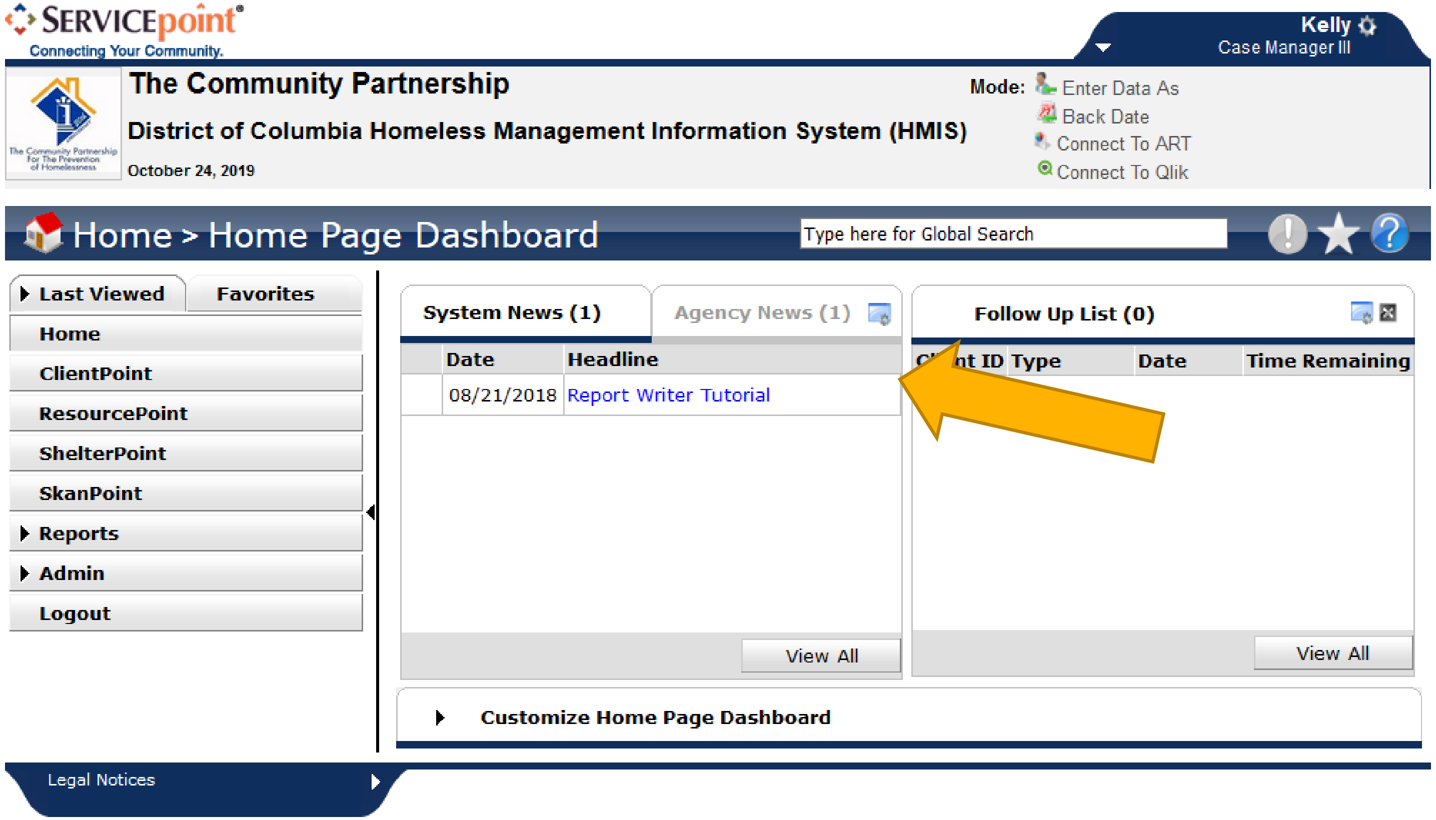
Live site:
https://washdc.servicept.com

Click here!

System News

- We are using System News to alert Users to changes in the system, as well as scheduled system down time.
- We will also be populating it with other resources so stay tuned…



The Community Partnership

District of Columbia Homeless Management Information System (HMIS)

October 24, 2019

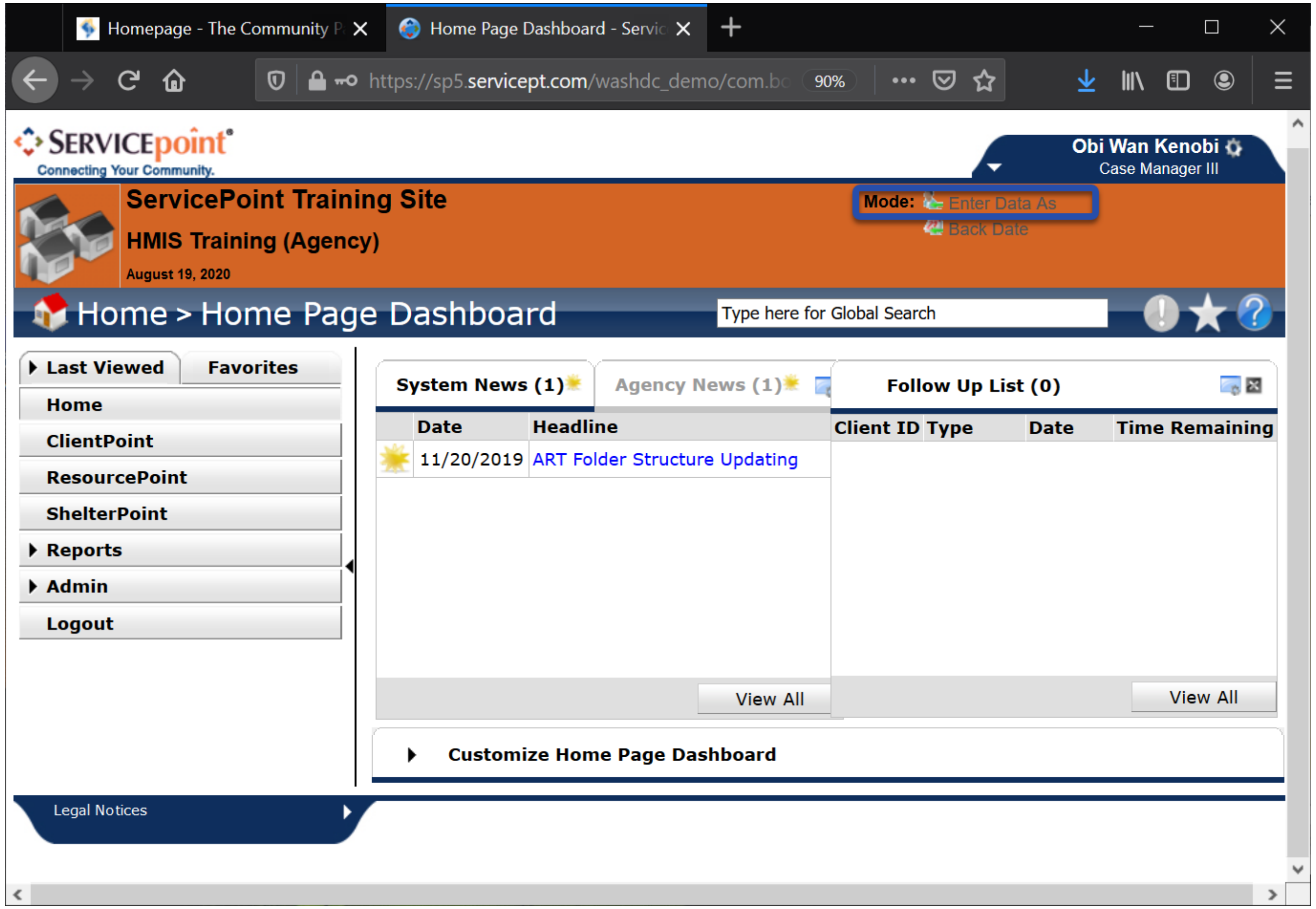
Date	Headline
08/21/2018	Report Writer Tutorial

What is Enter Data As?

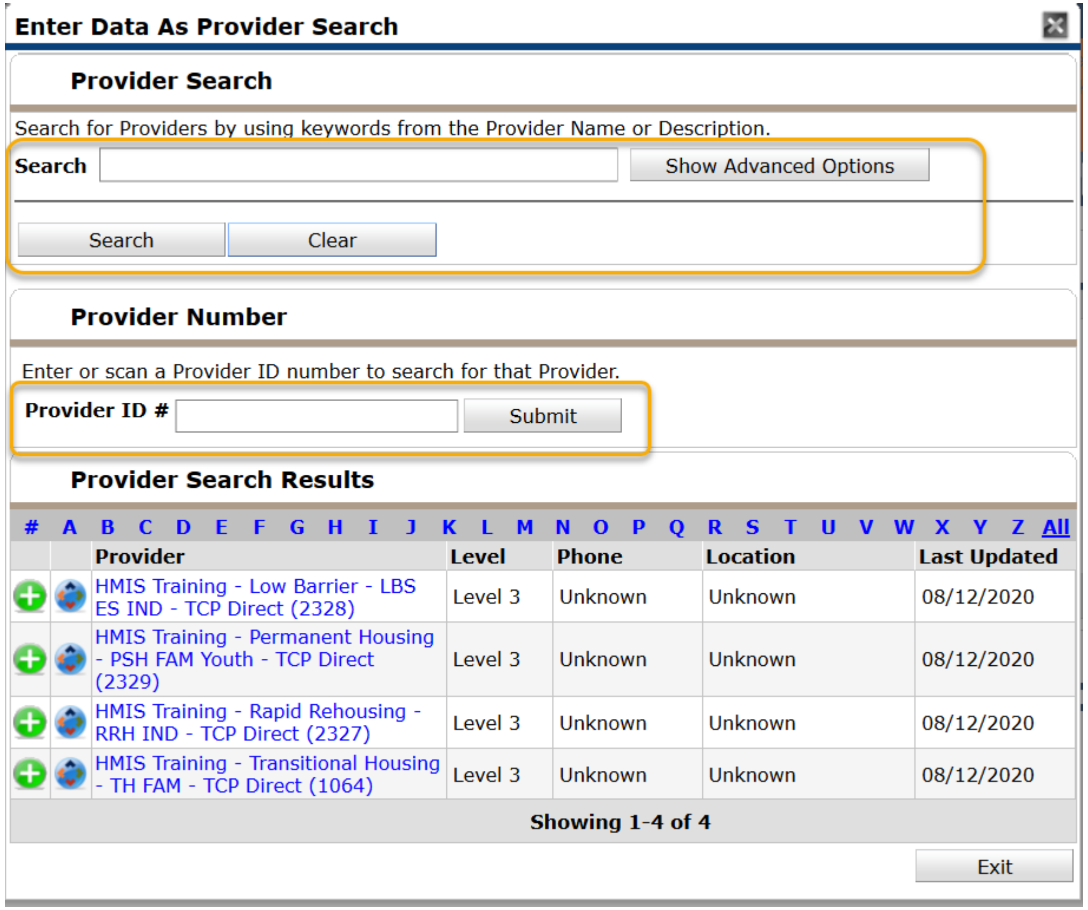
- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.

How to Enter Data As – Step 1

- When you log into HMIS, go to the top right corner and click on the Enter Data As button



How to Enter Data As – Step 2



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

Enter or scan a Provider ID number to search for that Provider.

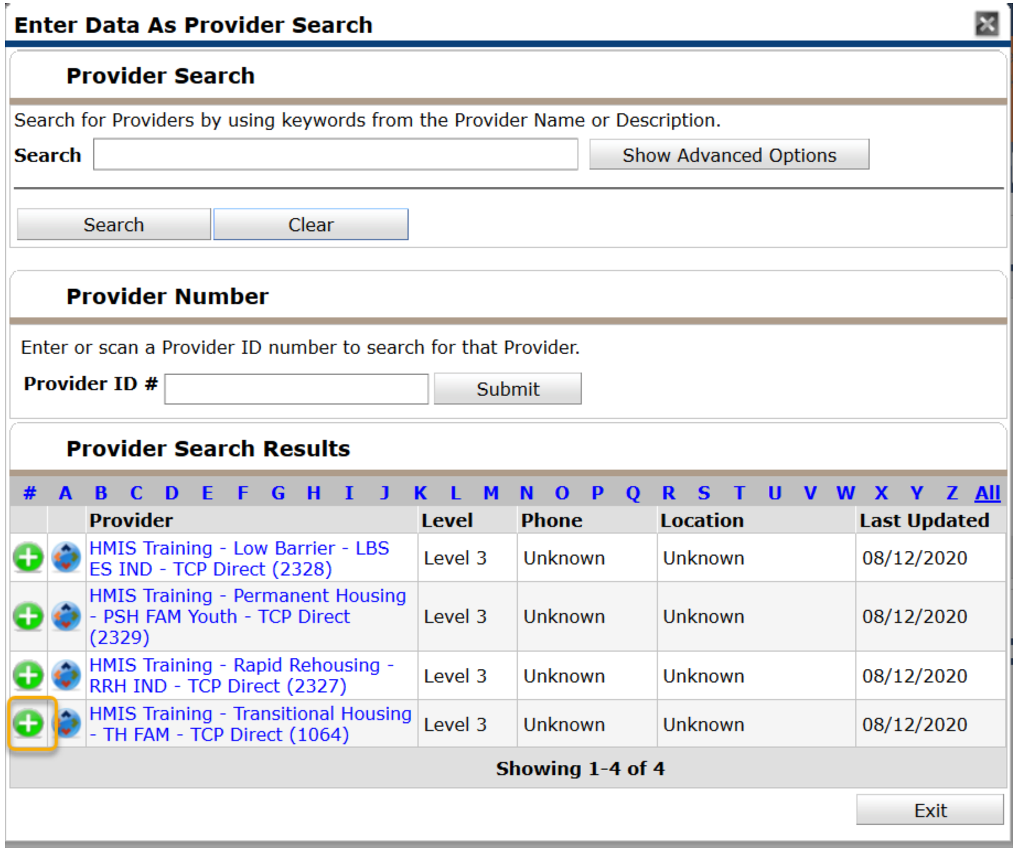
Provider	Level	Phone	Location	Last Updated
HMIS Training - Low Barrier - LBS ES IND - TCP Direct (2328)	Level 3	Unknown	Unknown	08/12/2020
HMIS Training - Permanent Housing - PSH FAM Youth - TCP Direct (2329)	Level 3	Unknown	Unknown	08/12/2020
HMIS Training - Rapid Rehousing - RRH IND - TCP Direct (2327)	Level 3	Unknown	Unknown	08/12/2020
HMIS Training - Transitional Housing - TH FAM - TCP Direct (1064)	Level 3	Unknown	Unknown	08/12/2020

Showing 1-4 of 4

- Find the program you are going to be doing data entry as.
  - You can search in the search box
  - You can type in the provider id
  - You can look through the list of options for the correct provider

How to Enter Data As – Step 3

- When you find the correct program, click the green plus sign.



Enter Data As Provider Search

Provider Search

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

Provider Number

Enter or scan a Provider ID number to search for that Provider.

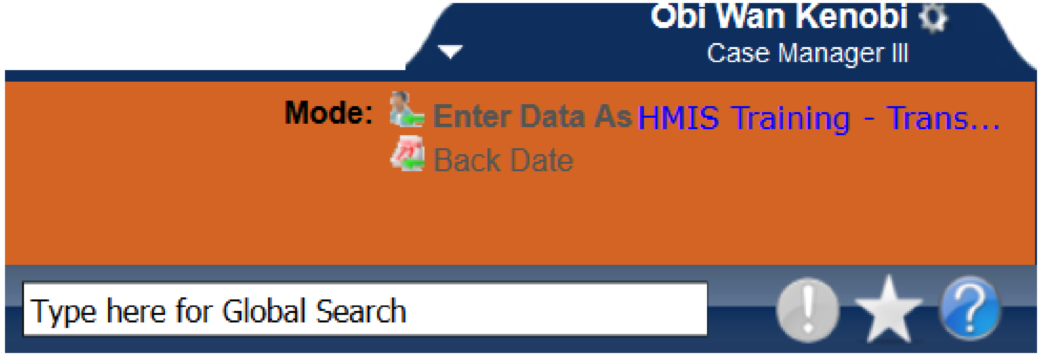
Provider ID #

Provider Search Results

		Provider	Level	Phone	Location	Last Updated
⊕		HMIS Training - Low Barrier - LBS ES IND - TCP Direct (2328)	Level 3	Unknown	Unknown	08/12/2020
⊕		HMIS Training - Permanent Housing - PSH FAM Youth - TCP Direct (2329)	Level 3	Unknown	Unknown	08/12/2020
⊕		HMIS Training - Rapid Rehousing - RRH IND - TCP Direct (2327)	Level 3	Unknown	Unknown	08/12/2020
⊕		HMIS Training - Transitional Housing - TH FAM - TCP Direct (1064)	Level 3	Unknown	Unknown	08/12/2020

Showing 1-4 of 4

How to Enter Data As – Step 4



Obi Wan Kenobi

Case Manager III

Mode: Enter Data As HMIS Training - Trans...

Back Date

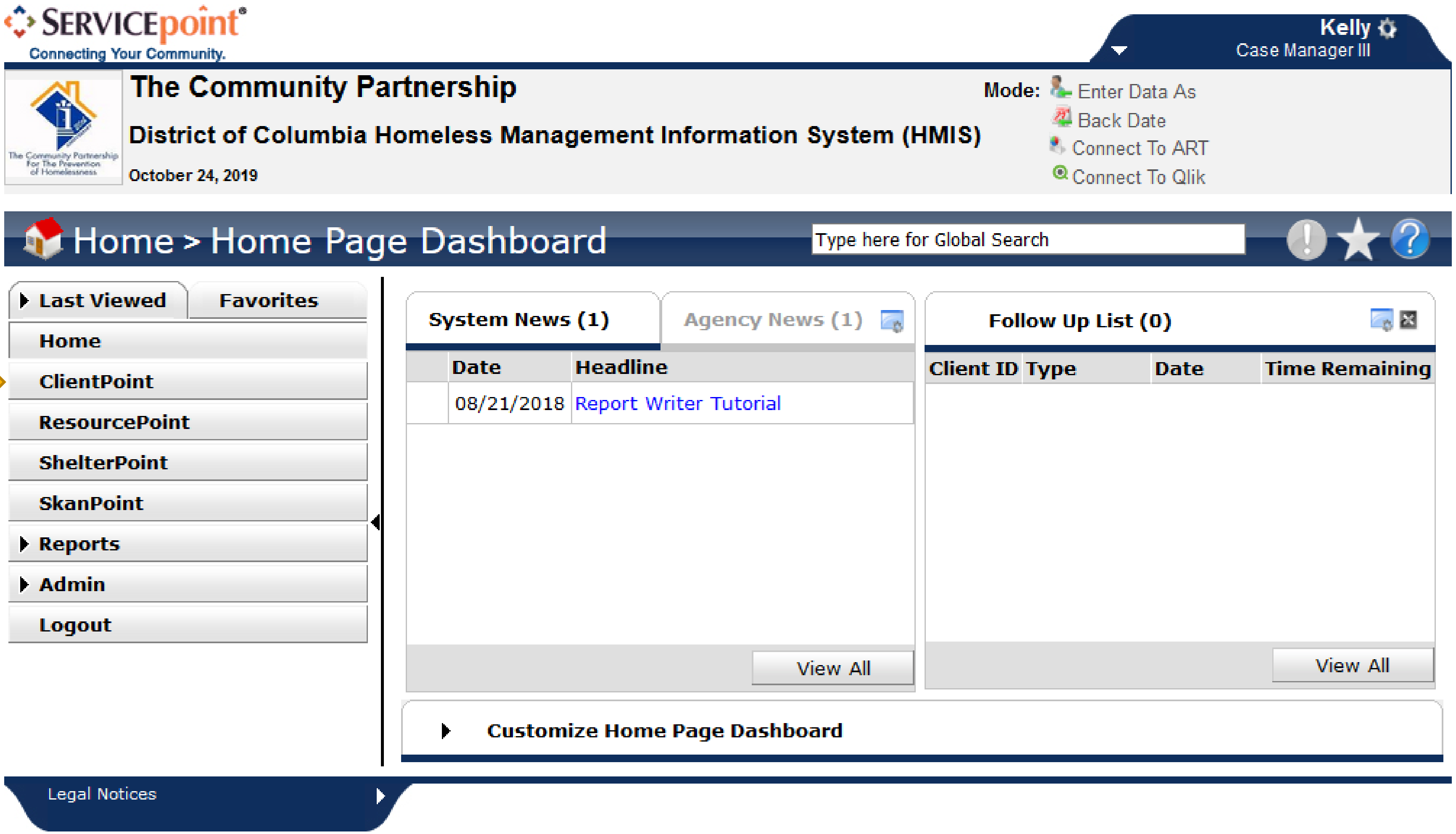
- When you click the green plus sign, the name of the provider you will be doing data entry as will appear next to Enter Data As.

- To remove the EDA click on the name of the provider (blue text).


End
Demo

Introduction to ClientPoint

- ClientPoint is used by most Agencies in order to document program stays, case plans, services provided, and case managers.
- The primary method of tracking program stays in ClientPoint is Entry/Exits.



The Community Partnership

District of Columbia Homeless Management Information System (HMIS)

October 24, 2019

Date	Headline
08/21/2018	Report Writer Tutorial

The Entry/Exit Workflow

- Tracking clients served by a given provider using Program Entry Date and Program Exit is an Entry/Exit Workflow.

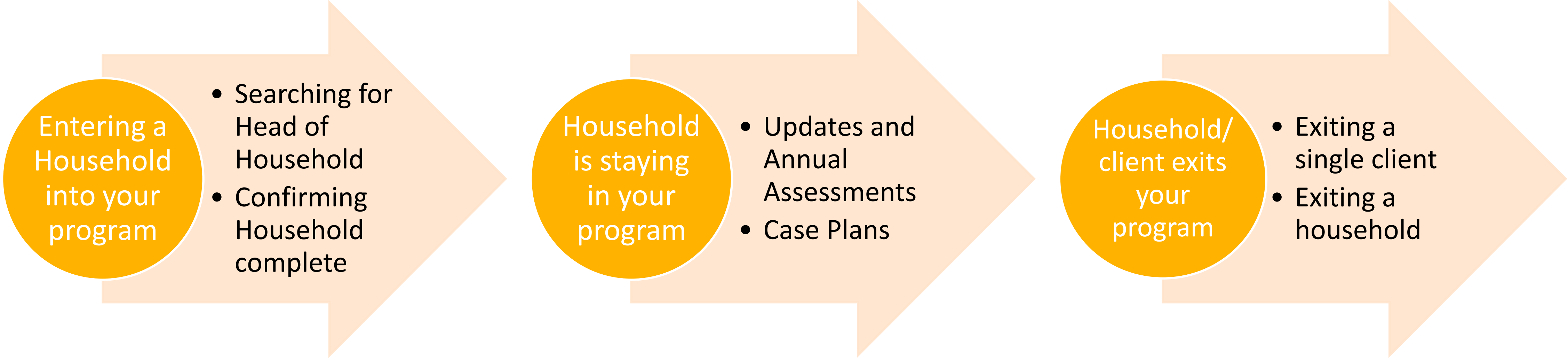
- Programs contributing data to the DC HMIS that use an Entry/Exit Workflow include:
  - Emergency and Temporary Shelters for Families;
  - Temporary Shelters for Singles;
  - Transitional Housing Programs for Families and Singles;
  - Permanent Supportive Housing Programs for Families and Singles; and
  - Rapid Rehousing Programs for Families and Singles.

- If you are unsure which program type you operate, please contact the HMIS Helpdesk.

What does Entry mean for my project type?

- **Street Outreach:**
  - Date of first contact with the client
- **Emergency Shelter:**
  - Night the client first stayed in shelter
- **Transitional Housing**:
  - Date the client moves into the residential project (first night in residence)
- **Permanent Housing** including **Rapid Re-housing:**
  - Date client was admitted into project
  - To be admitted indicates the following factors have been met:
    - Information provided by the client or from the referral indicates they meet the criteria for admission
    - The client has indicated they want to be housed in this project
    - The client is able to access services and housing through the project. The expectation is the project has a housing opening or expects to have on in a reasonably short amount of time
- **Supportive Services Only, Day Shelters, Homelessness Prevention, Coordinated Entry:**
  - Date the client first began working with the project and generally received the first provision of service.

The Entry/Exit Workflow



Entering a Household into your program

- Searching for Head of Household
- Confirming Household complete

Household is staying in your program

- Updates and Annual Assessments
- Case Plans

Household/ client exits your program

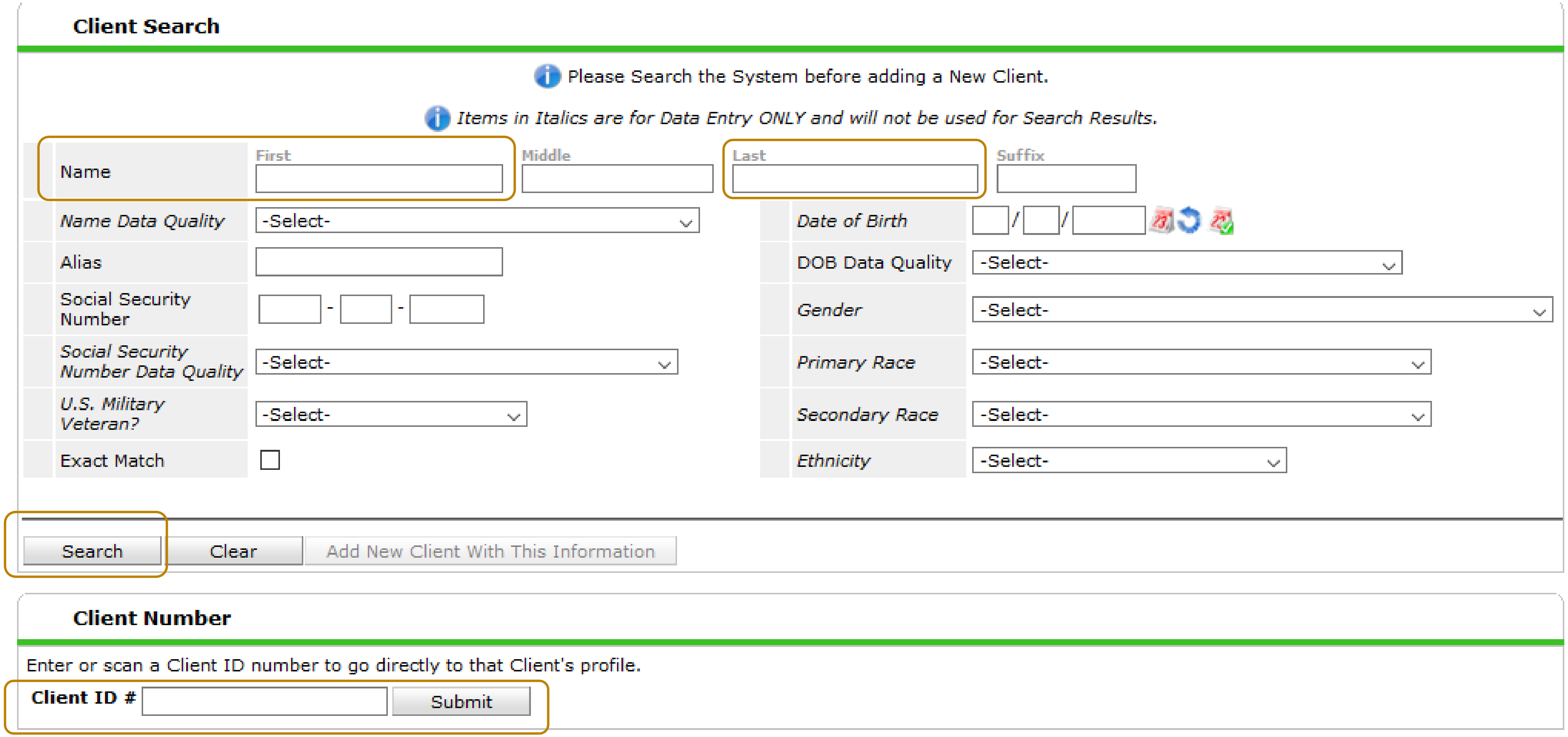
- Exiting a single client
- Exiting a household

Section 1: Entering a Household into your Program

Part 1: Searching for a Client (your head of household)

- You will need to search for a client in order to add the client to your program

- You can search for the client by name, or if you know the client's ID #, you can use that.



Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First: ___ Middle: ___ Last: ___ Suffix: ___		
Name Data Quality	-Select-	*Date of Birth*	__/__/____
Alias		DOB Data Quality	-Select-
Social Security Number	___ - ___ - ___	*Gender*	-Select-
Social Security Number Data Quality	-Select-	*Primary Race*	-Select-
U.S. Military Veteran?	-Select-	*Secondary Race*	-Select-
Exact Match	☐	*Ethnicity*	-Select-

Client Number

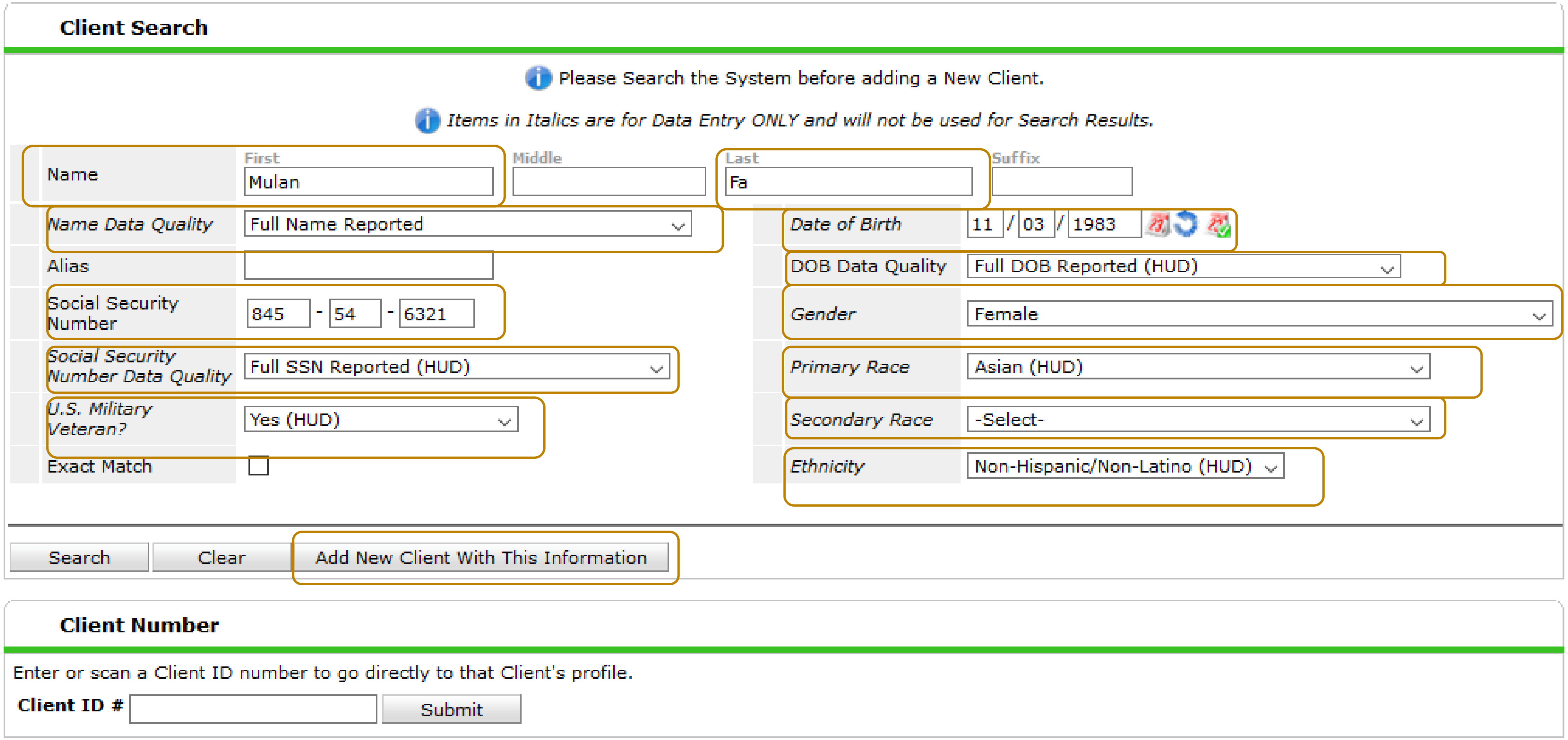
Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # ___

Creating a new client file

- If you do not find a client record for the client you are serving, you will need to create a new client record.

- This is done from the Search box in ClientPoint.



Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name: First: Mulan; Middle: ; Last: Fa; Suffix:

Name Data Quality: Full Name Reported

Alias:

Social Security Number: 845 - 54 - 6321

Social Security Number Data Quality: Full SSN Reported (HUD)

U.S. Military Veteran?: Yes (HUD)

Exact Match ☐

Date of Birth: 11 / 03 / 1983

DOB Data Quality: Full DOB Reported (HUD)

Gender: Female

Primary Race: Asian (HUD)

Secondary Race: -Select-

Ethnicity: Non-Hispanic/Non-Latino (HUD)

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Section 1: Entering a Household into your Program

Completing the Client Profile Information

- Once in the Client record in ClientPoint, navigate to the Client Profile.
- If there is any missing or incorrect information in the Client Record or Client Demographic sections, click the corresponding Edit Pencil(s) to make the necessary changes.

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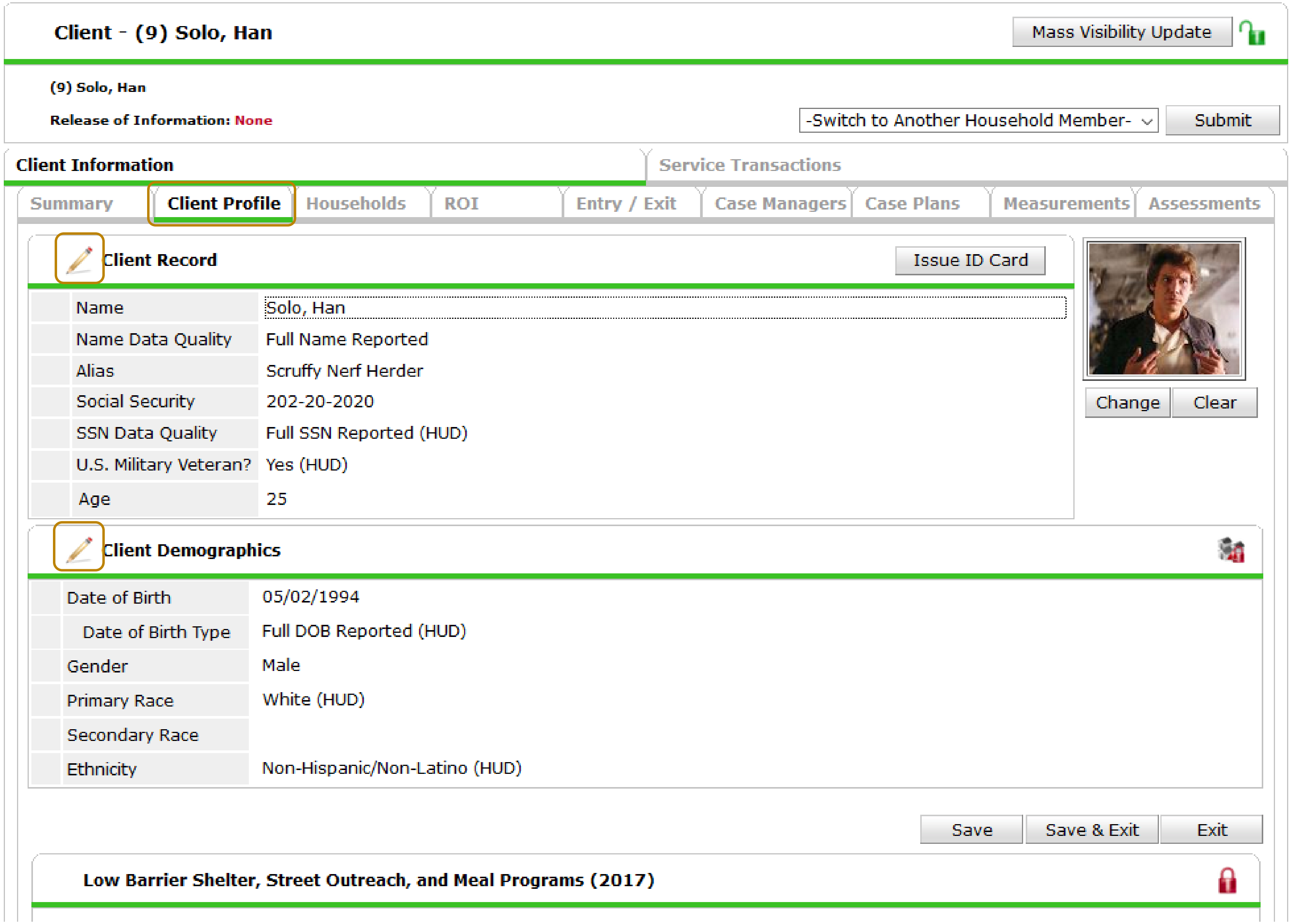


Client - (9) Solo, Han

(9) Solo, Han

Release of Information: None

Client Record

Name	Solo, Han
Name Data Quality	Full Name Reported
Alias	Scruffy Nerf Herder
Social Security	202-20-2020
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	25

Client Demographics

Date of Birth	05/02/1994
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	White (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)

Low Barrier Shelter, Street Outreach, and Meal Programs (2017)


End
Demo

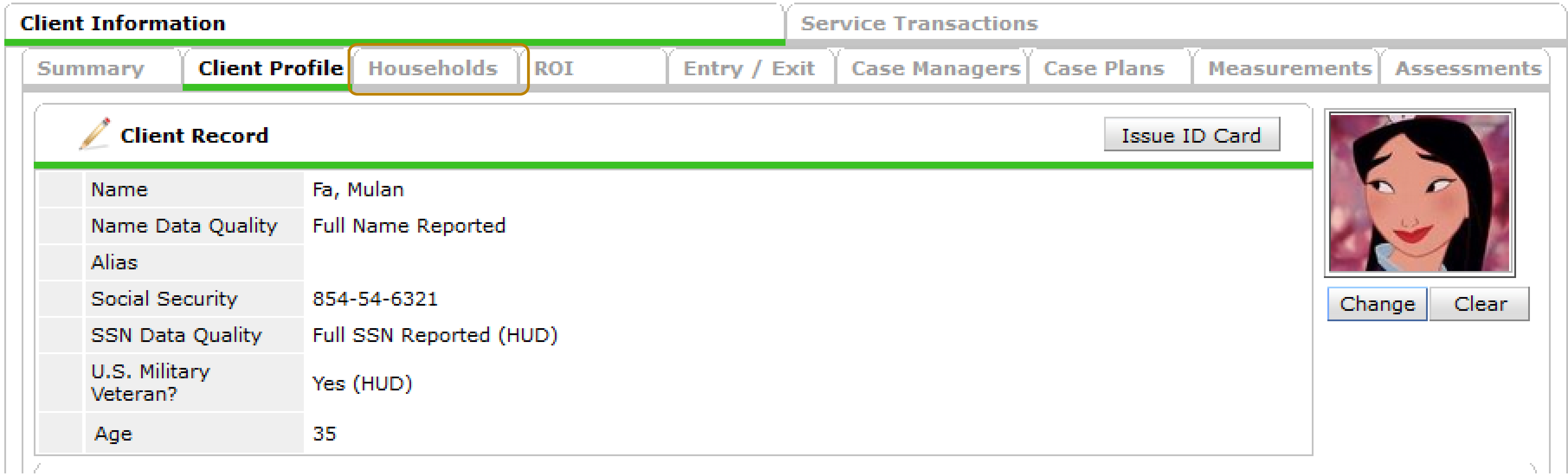
Section 1: Entering a Household into your Program

Part 2: Creating a Household/Confirming your household is complete

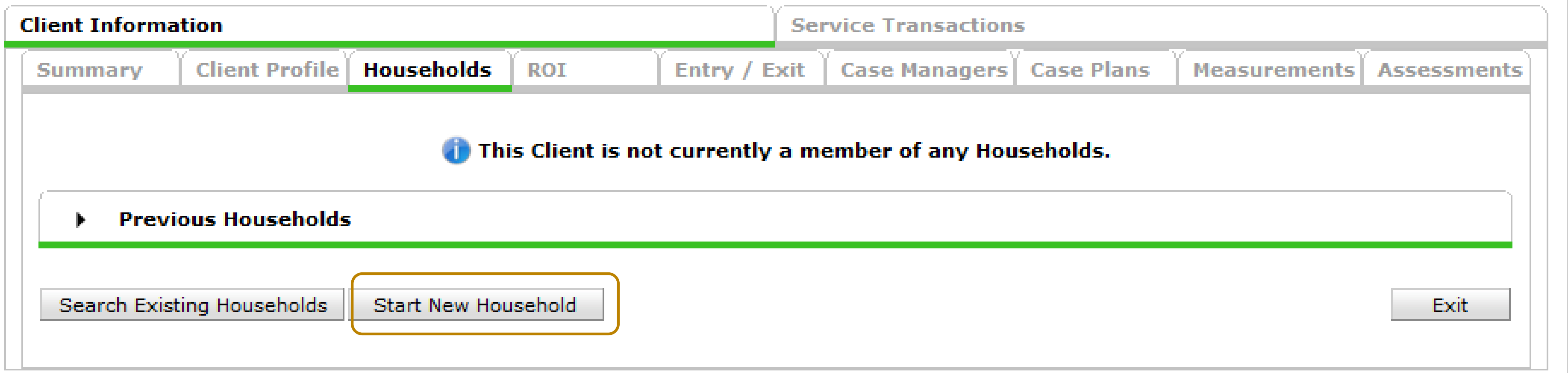
- Often, existing client records are a part of existing households.
- Use existing households wherever possible.
- If the household does not yet exist, you will need to create a new one. The following is an example of creating a household.

To create a new Household, navigate to the Household Tab.

Click “Start New Household”



Name	Fa, Mulan
Name Data Quality	Full Name Reported
Alias	
Social Security	854-54-6321
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	35

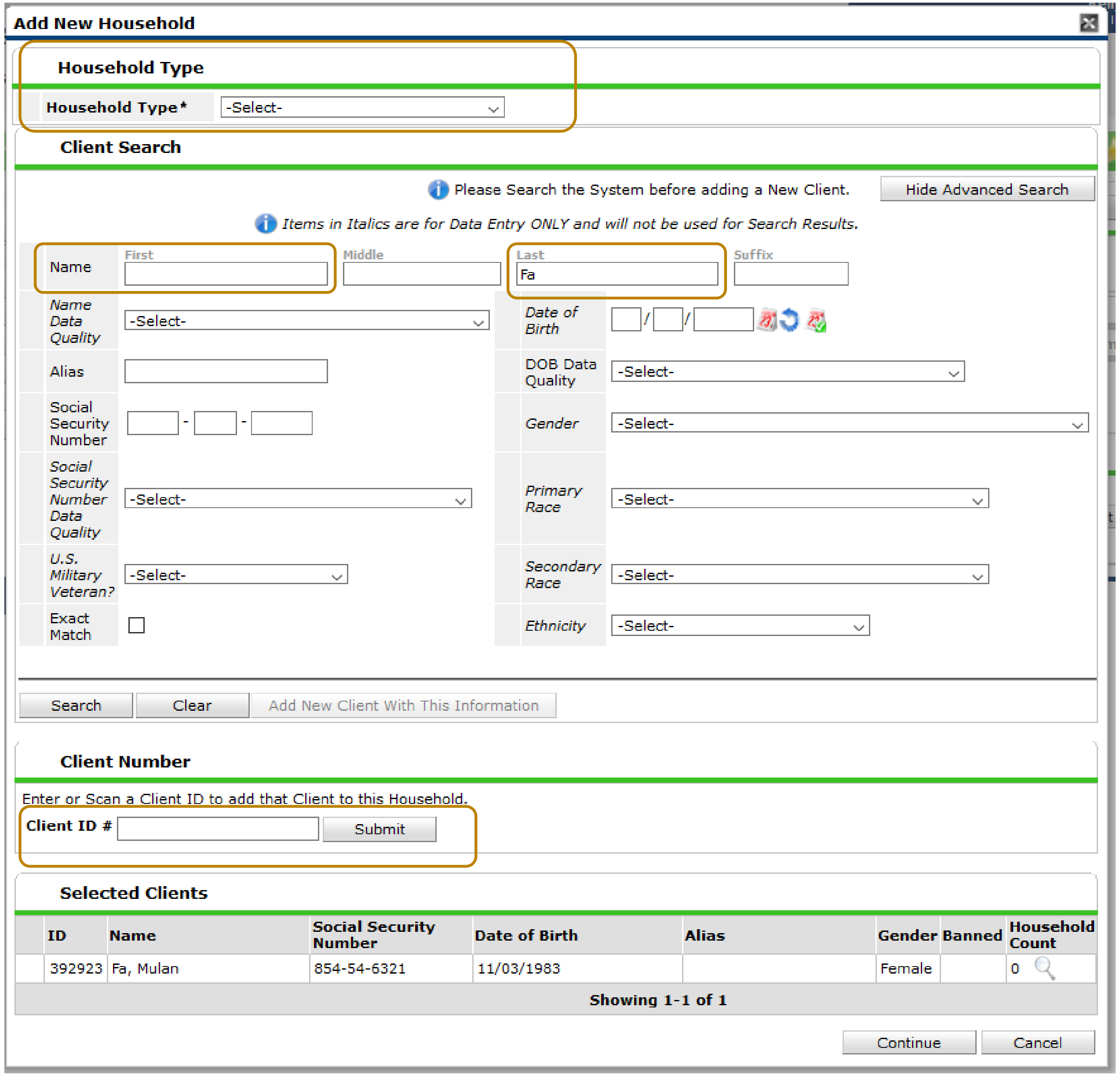


This Client is not currently a member of any Households.

Choose the Household Type

If you know the household member’s HMIS ID#, type it in the Client ID # and click “Submit”

If you do not know the household member’s HMIS ID #, Search for the client



Add New Household

Household Type

Household Type* -Select-

Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name: First / Middle / Last: Fa / Suffix

Name Data Quality: -Select-

Date of Birth: / /

Alias:

DOB Data Quality: -Select-

Social Security Number: - -

Gender: -Select-

Social Security Number Data Quality: -Select-

Primary Race: -Select-

U.S. Military Veteran?: -Select-

Secondary Race: -Select-

Exact Match ☐

Ethnicity: -Select-

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
392923	Fa, Mulan	854-54-6321	11/03/1983		Female		0

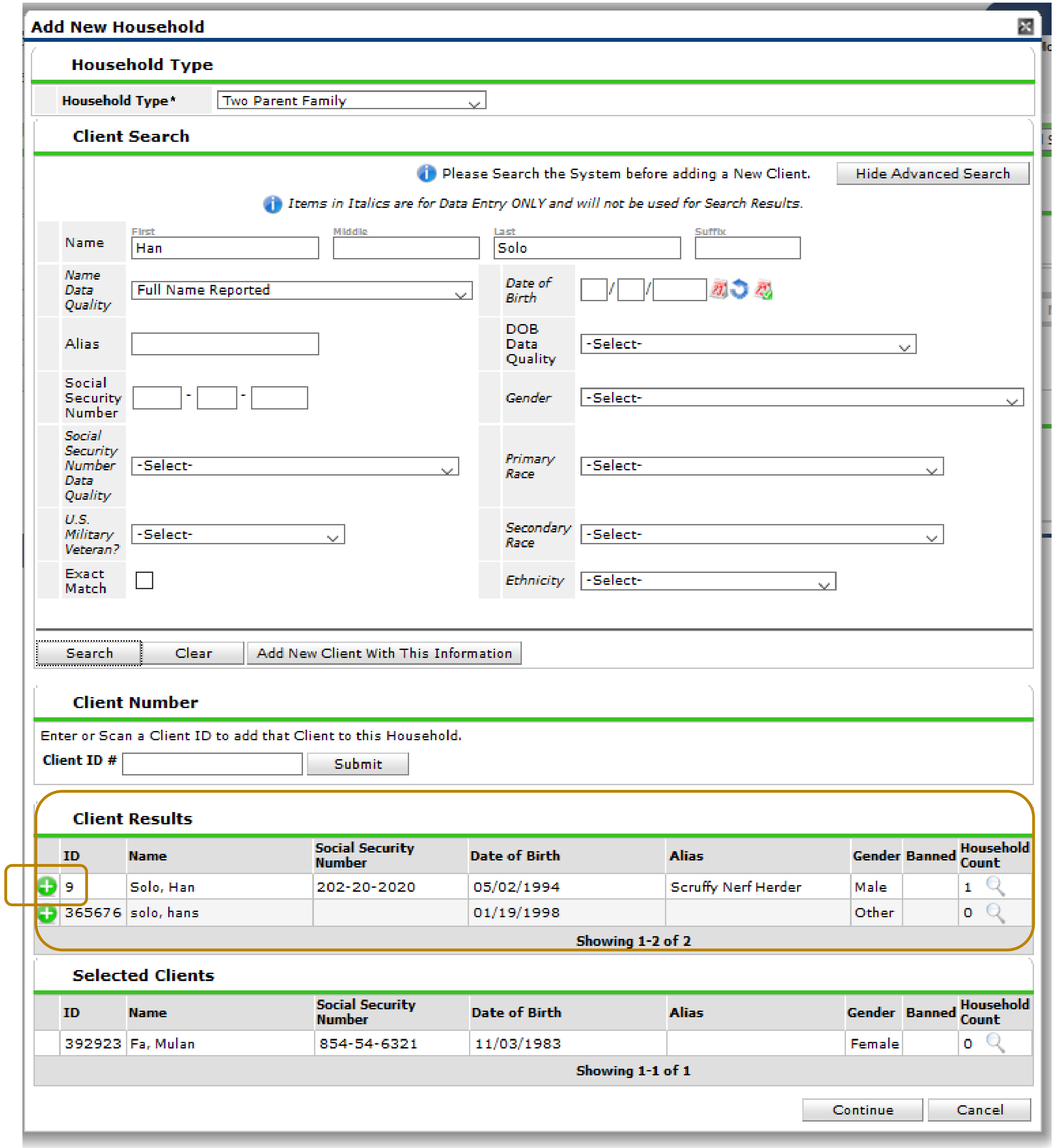
Showing 1-1 of 1

Choose the Household Type

If you know the household member’s HMIS ID#, type it in the Client ID # and click “Submit”

If you do not know the household member’s HMIS ID #, Search for the client

If the client appears in the Client Results Section ensure it is the correct client, and then select the green plus sign to add the client to the household.



Add New Household

Household Type

Household Type*: Two Parent Family

Client Search

Please Search the System before adding a New Client. [Hide Advanced Search]

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name: First: Han; Middle: ; Last: Solo; Suffix:

Name Data Quality: Full Name Reported

Date of Birth: / /

Alias:

DOB Data Quality: -Select-

Social Security Number: - -

Gender: -Select-

Social Security Number Data Quality: -Select-

Primary Race: -Select-

U.S. Military Veteran?: -Select-

Secondary Race: -Select-

Exact Match: ☐

Ethnicity: -Select-

[Search] [Clear] [Add New Client With This Information]

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #: [Submit]

Client Results

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
⊕	9	Solo, Han	202-20-2020	05/02/1994	Scruffy Nerf Herder	Male		1
⊕	365676	solo, hans		01/19/1998		Other		0

Showing 1-2 of 2

Selected Clients

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	392923	Fa, Mulan	854-54-6321	11/03/1983		Female		0

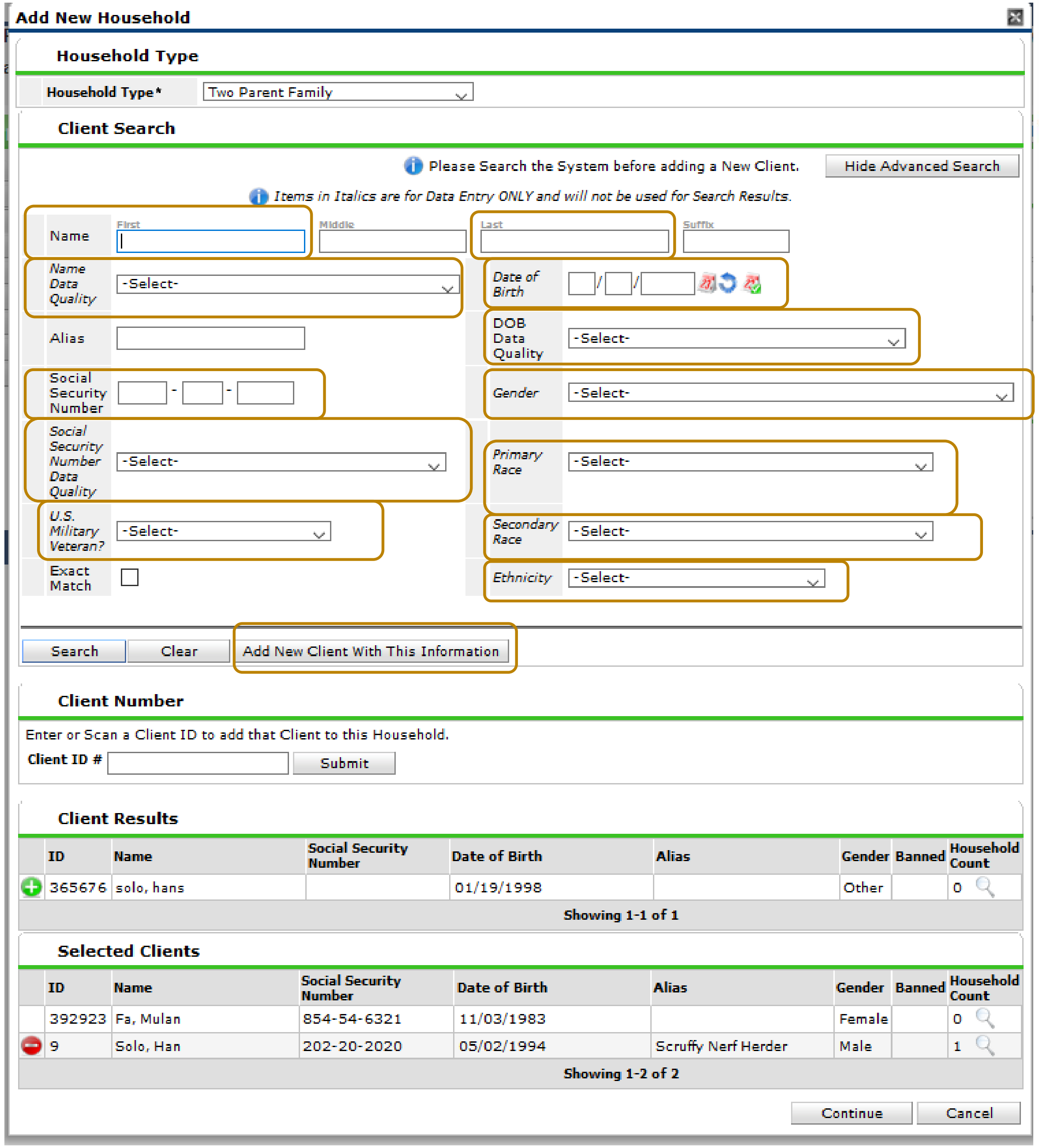
Showing 1-1 of 1

[Continue] [Cancel]

If the client doesn’t appear in the search, add the new client in the Add New Household Tab.

You MUST search for the client record before you are able to create a new client record.

You MUST enter all the information indicated BEFORE you click “Add New Client With This Information”



Add New Household

Household Type

Household Type*	Two Parent Family

Client Search

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First / Middle / Last / Suffix		
Name Data Quality	-Select-	*Date of Birth*	/ /
Alias		DOB Data Quality	-Select-
Social Security Number	- -	*Gender*	-Select-
Social Security Number Data Quality	-Select-	*Primary Race*	-Select-
U.S. Military Veteran?	-Select-	*Secondary Race*	-Select-
Exact Match	☐	*Ethnicity*	-Select-

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
365676	solo, hans		01/19/1998		Other		0

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
392923	Fa, Mulan	854-54-6321	11/03/1983		Female		0
9	Solo, Han	202-20-2020	05/02/1994	Scruffy Nerf Herder	Male		1

Showing 1-2 of 2

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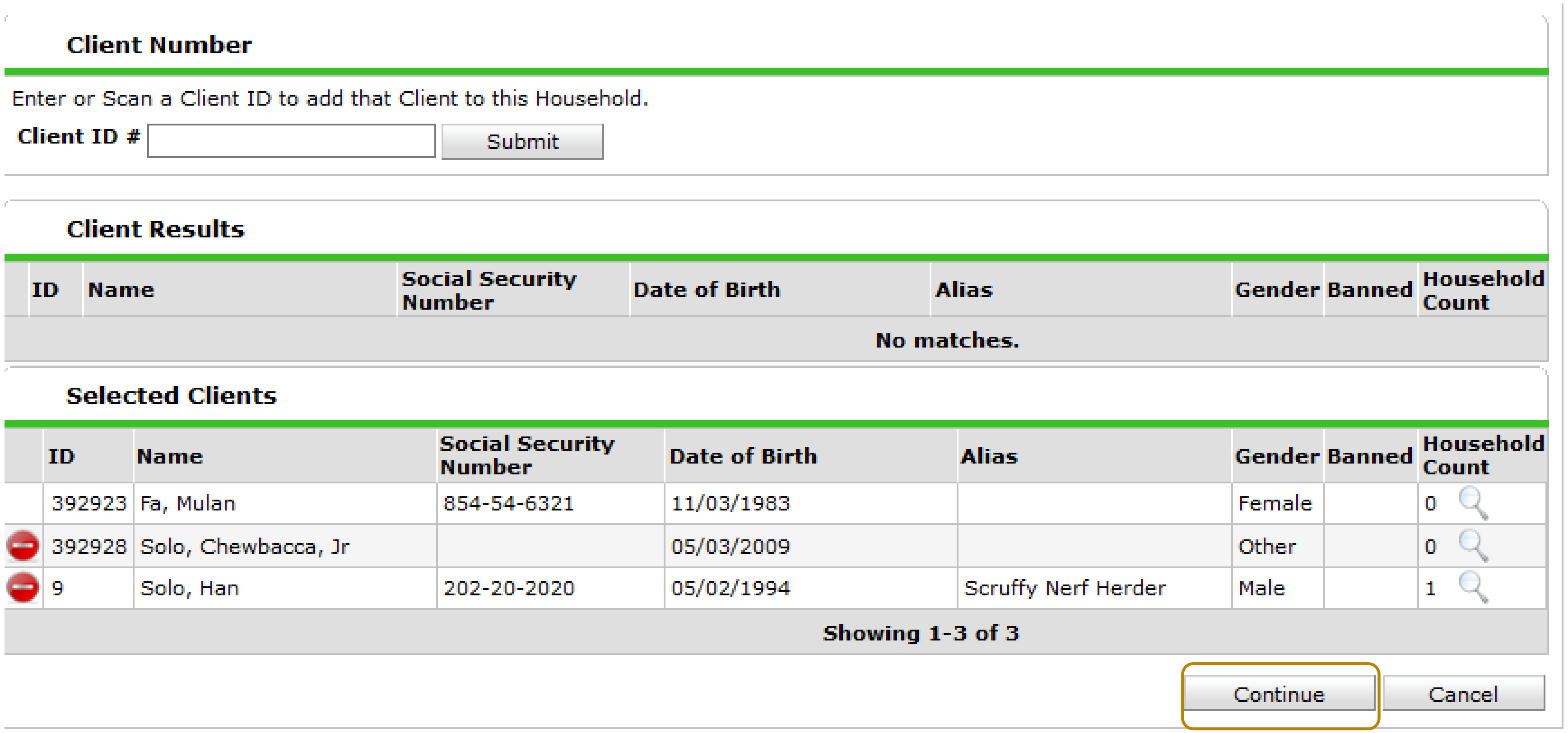
Once the household is fully built, Click Continue.



Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
			No matches.				

Selected Clients

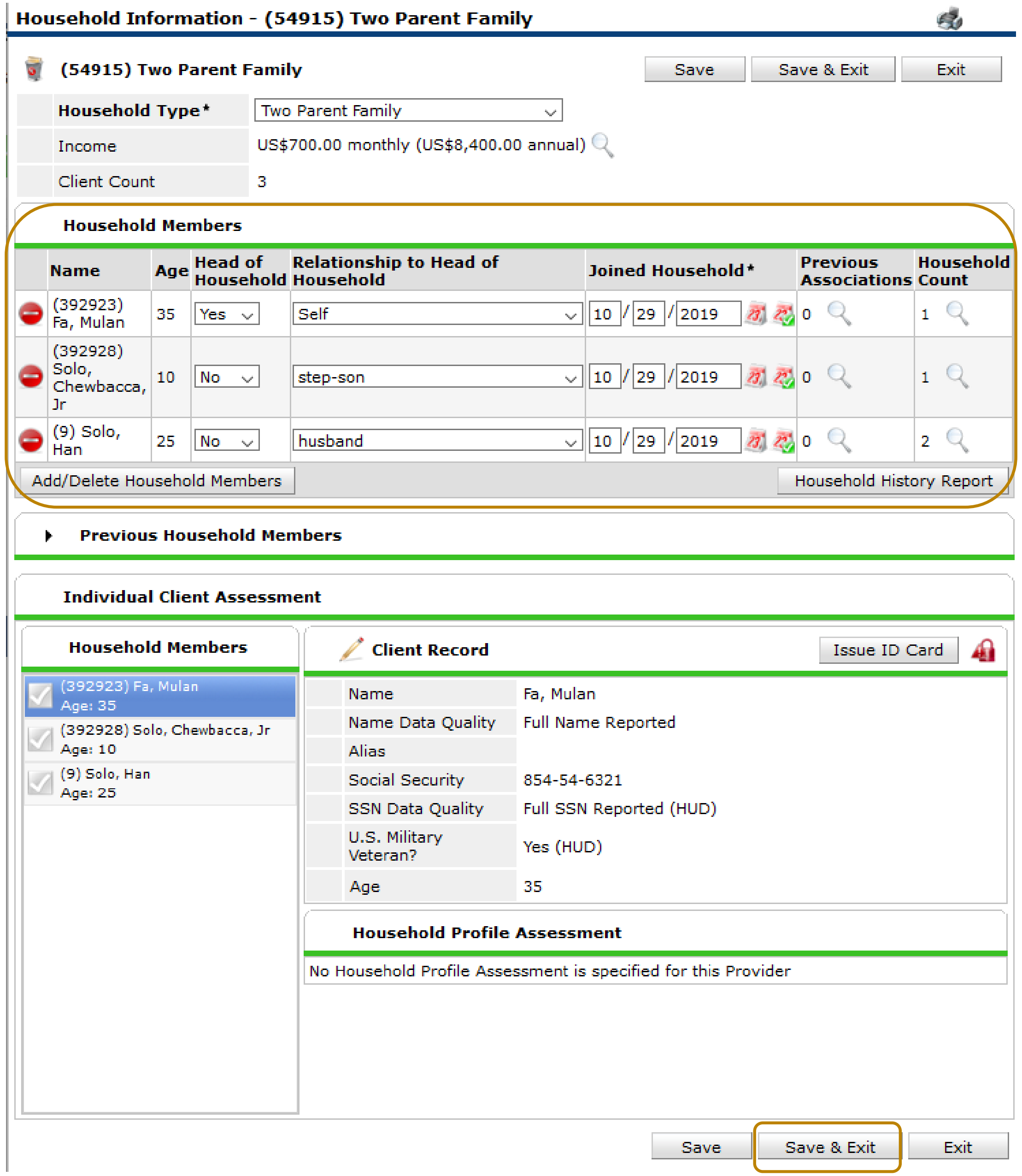
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
392923	Fa, Mulan	854-54-6321	11/03/1983		Female		0
392928	Solo, Chewbacca, Jr		05/03/2009		Other		0
9	Solo, Han	202-20-2020	05/02/1994	Scruffy Nerf Herder	Male		1

Showing 1-3 of 3

In the Household Members section, assign 1 person as Head of Household = Yes. This will automatically make the client's relationship to Head of Household = Self.

Then select the Relationship to Head of Household for the other household members.

When complete, click "Save & Exit"



Household Information - (54915) Two Parent Family

(54915) Two Parent Family

Household Type*	Two Parent Family
Income	US$700.00 monthly (US$8,400.00 annual)
Client Count	3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household*	Previous Associations	Household Count
(392923) Fa, Mulan	35	Yes	Self	10/29/2019	0	1
(392928) Solo, Chewbacca, Jr	10	No	step-son	10/29/2019	0	1
(9) Solo, Han	25	No	husband	10/29/2019	0	2

Previous Household Members

Individual Client Assessment

Household Members

- (392923) Fa, Mulan Age: 35
- (392928) Solo, Chewbacca, Jr Age: 10
- (9) Solo, Han Age: 25

Client Record

Name	Fa, Mulan
Name Data Quality	Full Name Reported
Alias	
Social Security	854-54-6321
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	35

Household Profile Assessment

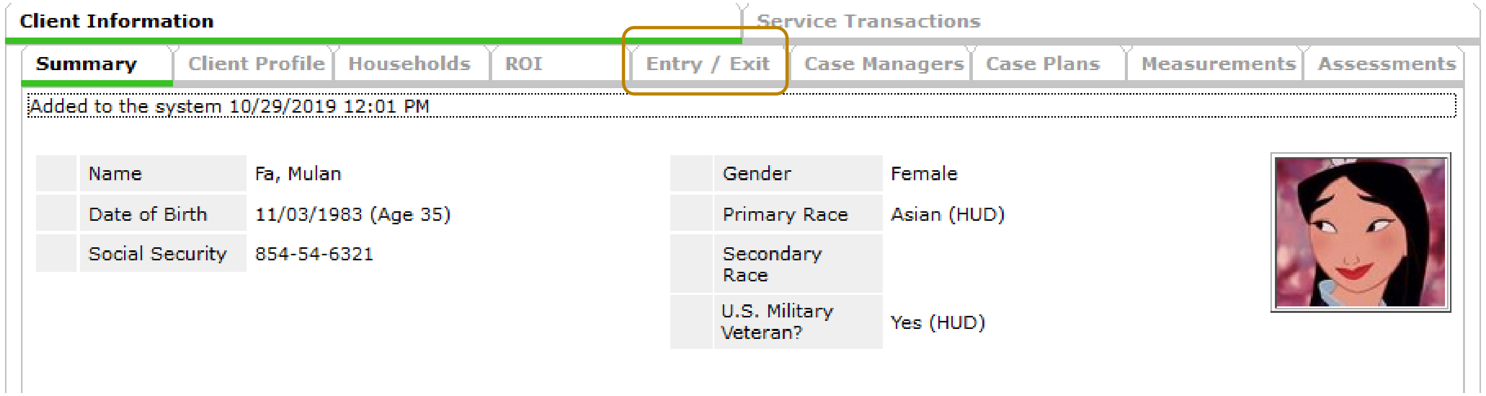
No Household Profile Assessment is specified for this Provider

End
Demo

Section 1: Entering a Household into your Program

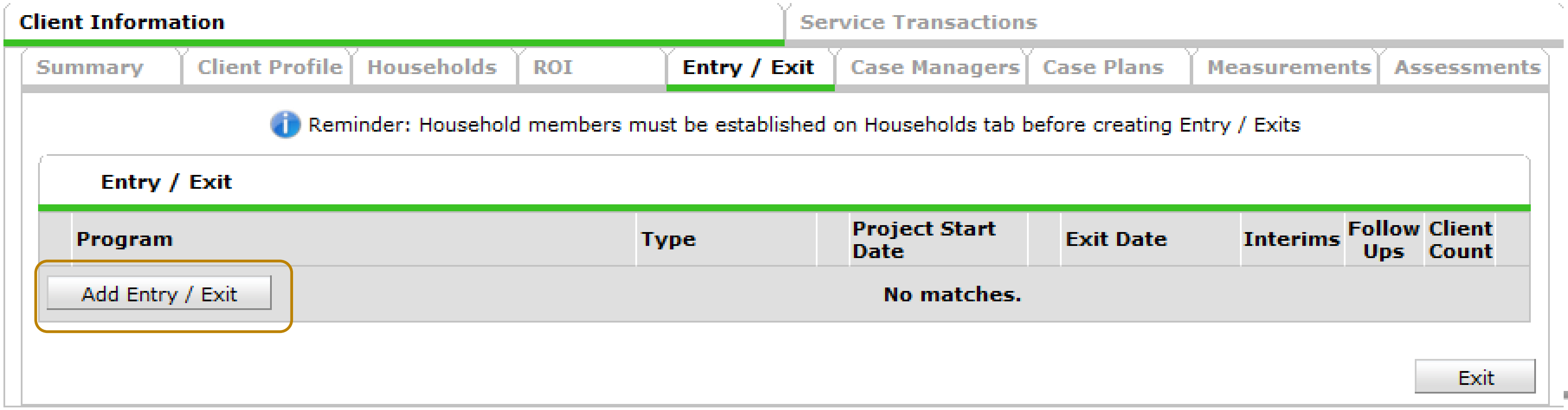
Part 3: Creating an Entry

- To document the household's participation in the program, you need to create an Entry.
- Navigate to the Entry/Exit Tab.



Added to the system 10/29/2019 12:01 PM

Name	Fa, Mulan	Gender	Female
Date of Birth	11/03/1983 (Age 35)	Primary Race	Asian (HUD)
Social Security	854-54-6321	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)

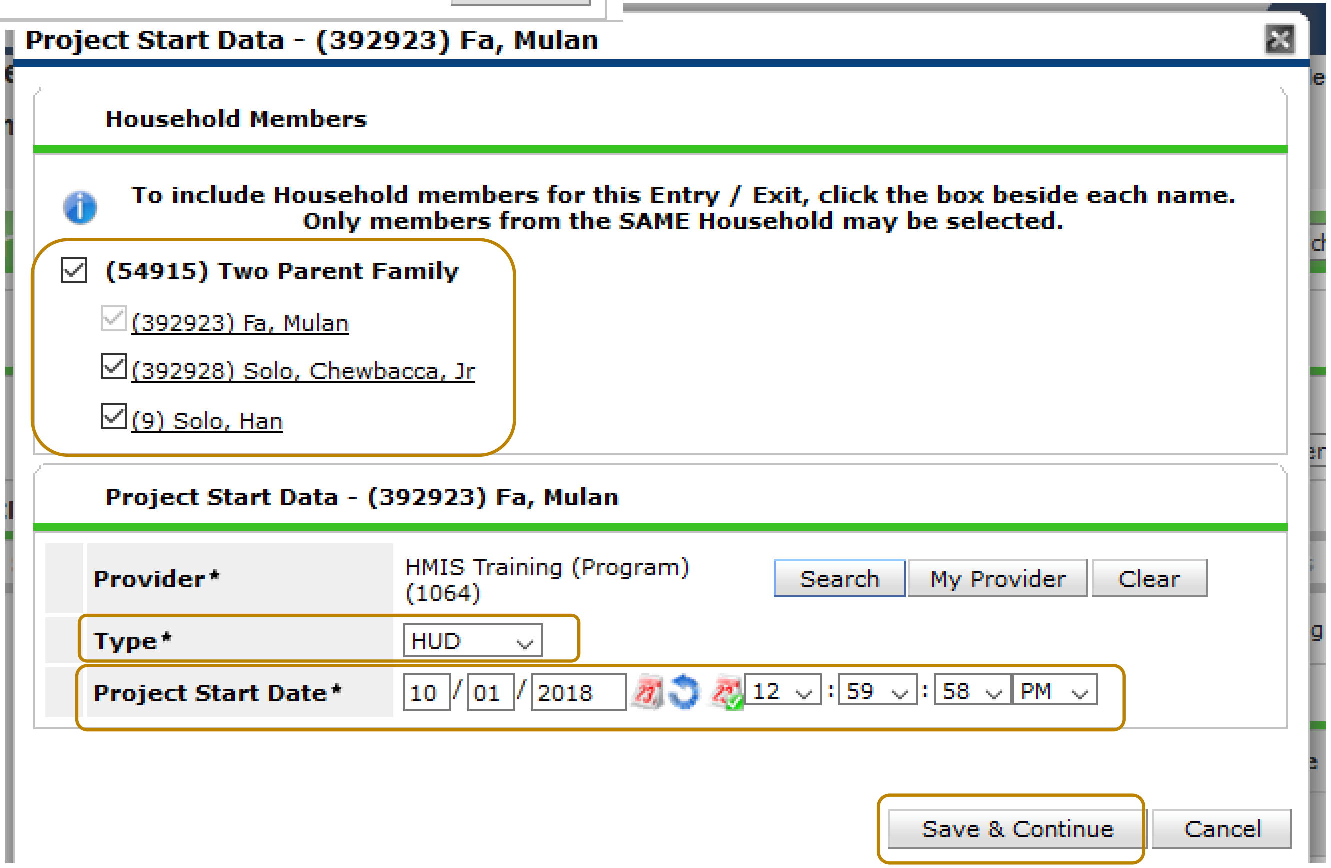


Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
No matches.						

- Click “Add Entry/Exit”
- Select the members of the household that are being served.
- Choose the correct Type
- Set the Project Start Date
- Click Save & Continue



Project Start Data - (392923) Fa, Mulan

Household Members

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

☑ (54915) Two Parent Family
- ☑ (392923) Fa, Mulan
- ☑ (392928) Solo, Chewbacca, Jr
- ☑ (9) Solo, Han

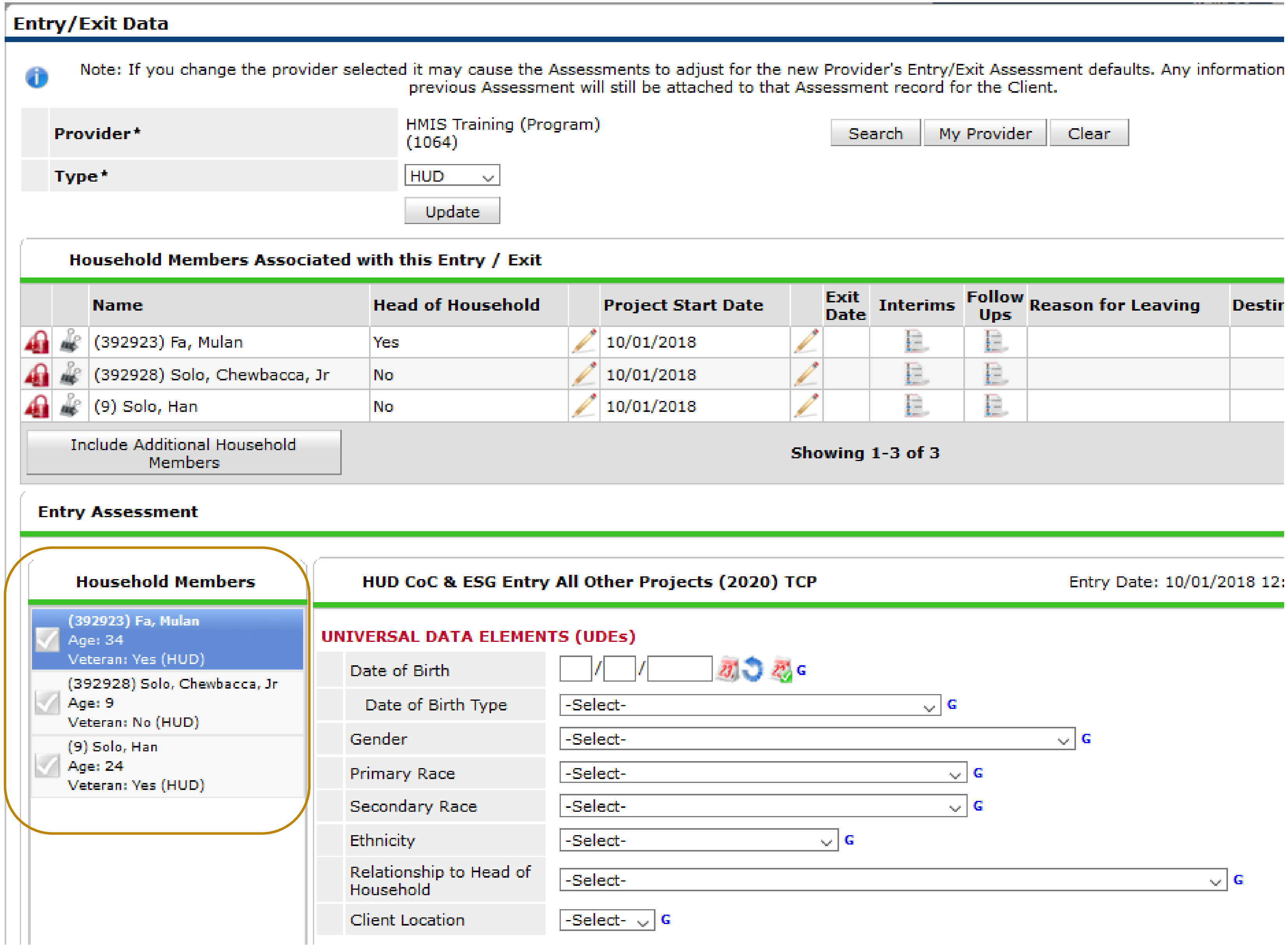
Project Start Data - (392923) Fa, Mulan

Provider*	HMIS Training (Program) (1064)
Type*	HUD
Project Start Date*	10 / 01 / 2018 12 : 59 : 58 PM

The Community Partnership
For The Prevention
of Homelessness

The Entry/Exit Data pop-up shows the clients that are associated with the Entry/Exit.

The Household Members on the side can be clicked on to toggle to the other clients and their assessments.



Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information previous Assessment will still be attached to that Assessment record for the Client.

Provider*	HMIS Training (Program) (1064)
Type*	HUD

Household Members Associated with this Entry / Exit

		Name	Head of Household		Project Start Date		Exit Date	Interims	Follow Ups	Reason for Leaving	Destir
		(392923) Fa, Mulan	Yes		10/01/2018						
		(392928) Solo, Chewbacca, Jr	No		10/01/2018						
		(9) Solo, Han	No		10/01/2018						

Showing 1-3 of 3

Entry Assessment

Household Members

- ☑ (392923) Fa, Mulan
Age: 34
Veteran: Yes (HUD)
- ☑ (392928) Solo, Chewbacca, Jr
Age: 9
Veteran: No (HUD)
- ☑ (9) Solo, Han
Age: 24
Veteran: Yes (HUD)

HUD CoC & ESG Entry All Other Projects (2020) TCP

Entry Date: 10/01/2018 12:

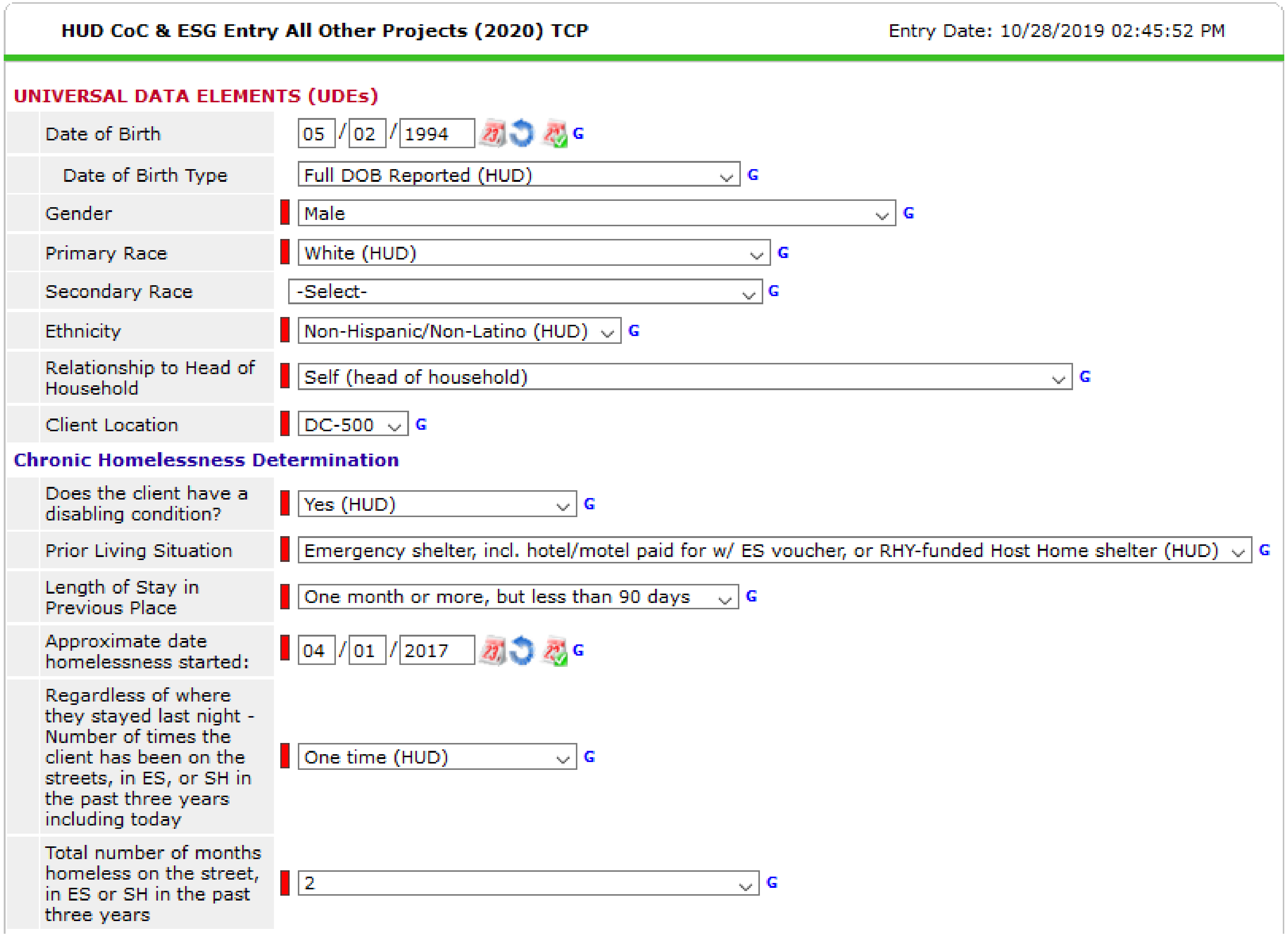
UNIVERSAL DATA ELEMENTS (UDEs)

Date of Birth	__/__/____
Date of Birth Type	-Select-
Gender	-Select-
Primary Race	-Select-
Secondary Race	-Select-
Ethnicity	-Select-
Relationship to Head of Household	-Select-
Client Location	-Select-

Section 1: Entering a Household into your Program

Part 4: The Entry Assessment

- The Entry Assessment captures the universal data elements requested by the Federal Partners and DC CoC as well as any program specific data elements required for your agency's funding source.
- Street Outreach, Emergency Shelters, and Safe Havens have a different set of assessments than all other project types. This is due to the way HUD captures Previous Living Situation information.
- Most programs (Non SO, ES, or SH) have the **HUD CoC & ESG Entry All Other Programs (2020) TCP** assessment. This is the required assessment for all HUD CoC and DHS funded programs.



HUD CoC & ESG Entry All Other Projects (2020) TCP

Entry Date: 10/28/2019 02:45:52 PM

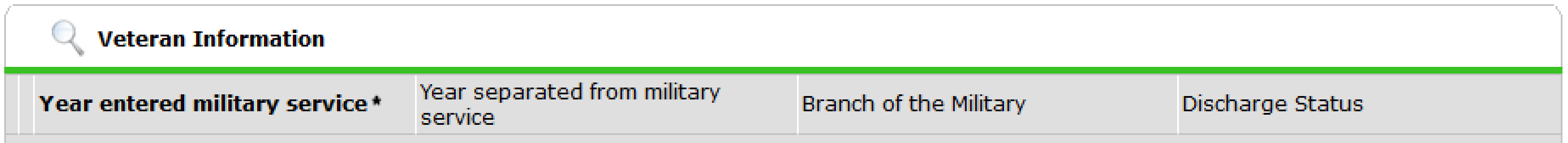
UNIVERSAL DATA ELEMENTS (UDEs)

Date of Birth	05 / 02 / 1994
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	White (HUD)
Secondary Race	-Select-
Ethnicity	Non-Hispanic/Non-Latino (HUD)
Relationship to Head of Household	Self (head of household)
Client Location	DC-500

Chronic Homelessness Determination

Does the client have a disabling condition?	Yes (HUD)
Prior Living Situation	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)
Length of Stay in Previous Place	One month or more, but less than 90 days
Approximate date homelessness started:	04 / 01 / 2017
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

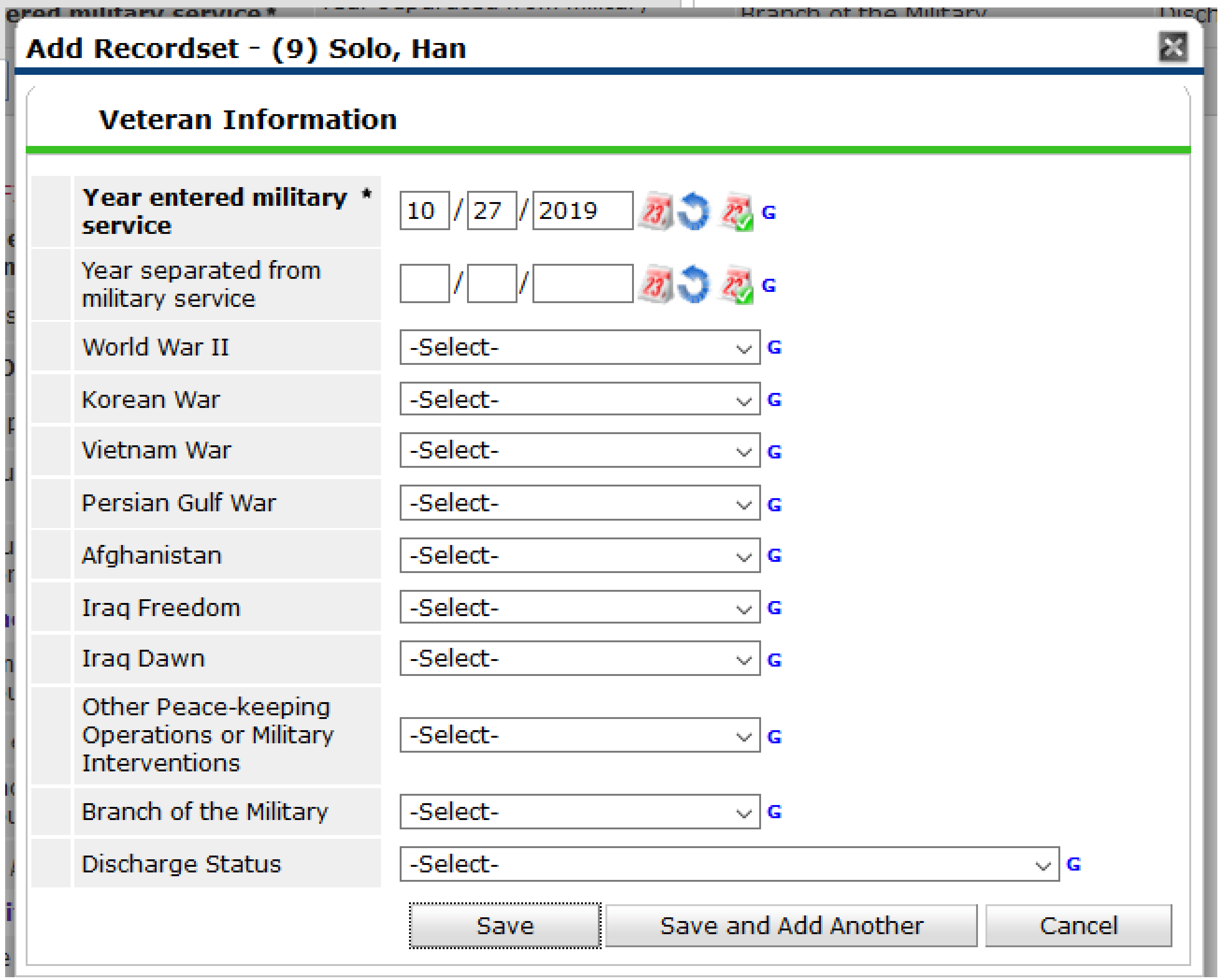
VETERAN INFORMATION



Veteran Information

Year entered military service*	Year separated from military service	Branch of the Military	Discharge Status

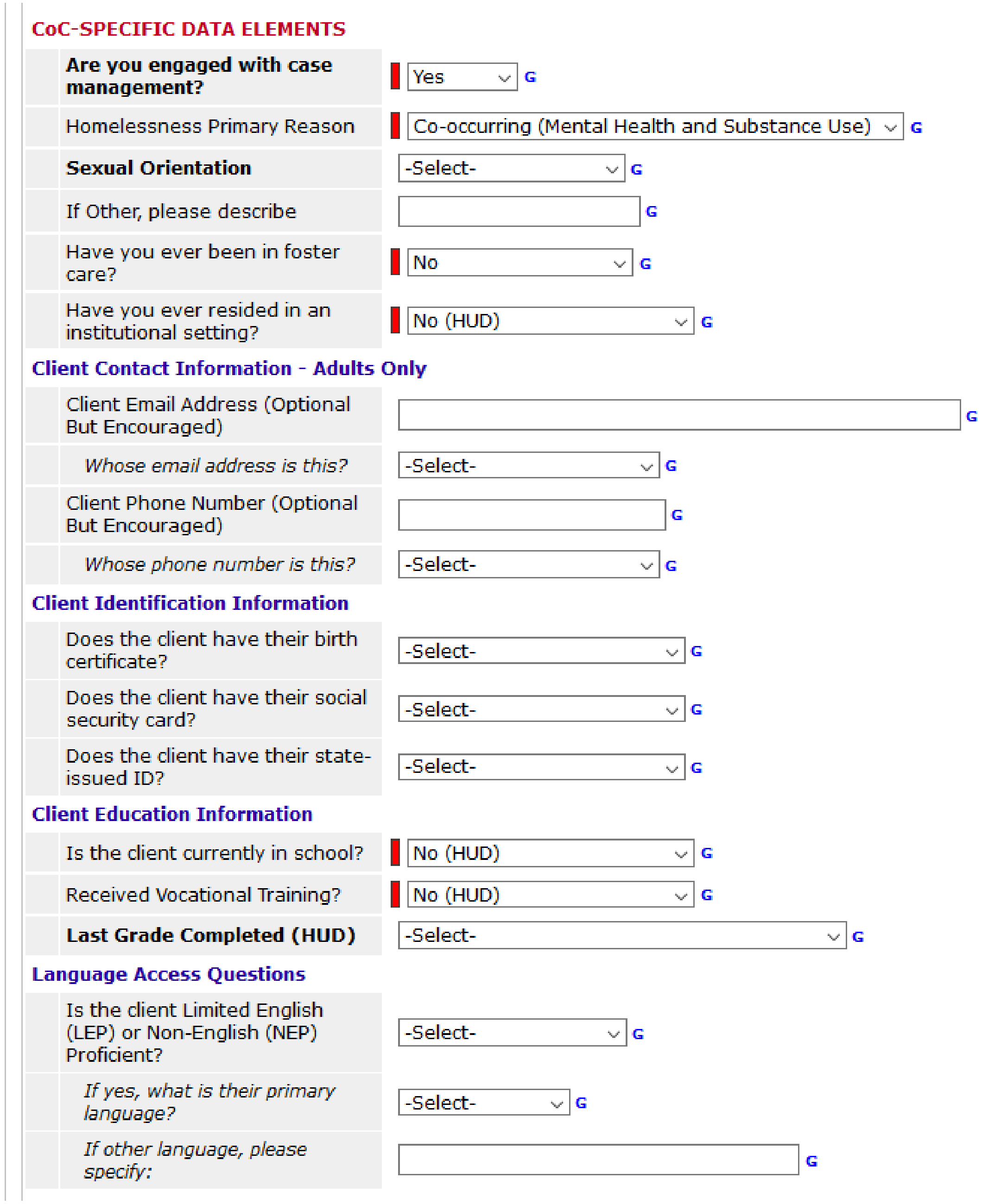
- Anyone for whom you answer ‘yes’ to the question **U.S. Military Veteran**, you must also complete the Veteran Information sub-assessment.
- Make sure to confirm or deny each of the different war eras.



Add Recordset - (9) Solo, Han

Veteran Information

Year entered military service *	10 / 27 / 2019
Year separated from military service	/ /
World War II	-Select-
Korean War	-Select-
Vietnam War	-Select-
Persian Gulf War	-Select-
Afghanistan	-Select-
Iraq Freedom	-Select-
Iraq Dawn	-Select-
Other Peace-keeping Operations or Military Interventions	-Select-
Branch of the Military	-Select-
Discharge Status	-Select-



CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management?	Yes
Homelessness Primary Reason	Co-occurring (Mental Health and Substance Use)
Sexual Orientation	-Select-
If Other, please describe	
Have you ever been in foster care?	No
Have you ever resided in an institutional setting?	No (HUD)

Client Contact Information - Adults Only

Client Email Address (Optional But Encouraged)	
Whose email address is this?	-Select-
Client Phone Number (Optional But Encouraged)	
Whose phone number is this?	-Select-

Client Identification Information

Does the client have their birth certificate?	-Select-
Does the client have their social security card?	-Select-
Does the client have their state-issued ID?	-Select-

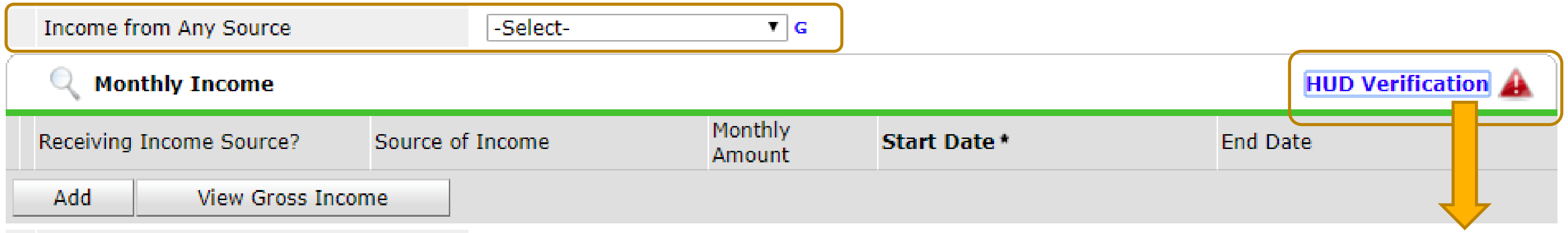
Client Education Information

Is the client currently in school?	No (HUD)
Received Vocational Training?	No (HUD)
Last Grade Completed (HUD)	-Select-

Language Access Questions

Is the client Limited English (LEP) or Non-English (NEP) Proficient?	-Select-
If yes, what is their primary language?	-Select-
If other language, please specify:	

These are DC’s Universal Data Elements. They are required regardless of your program’s funding.

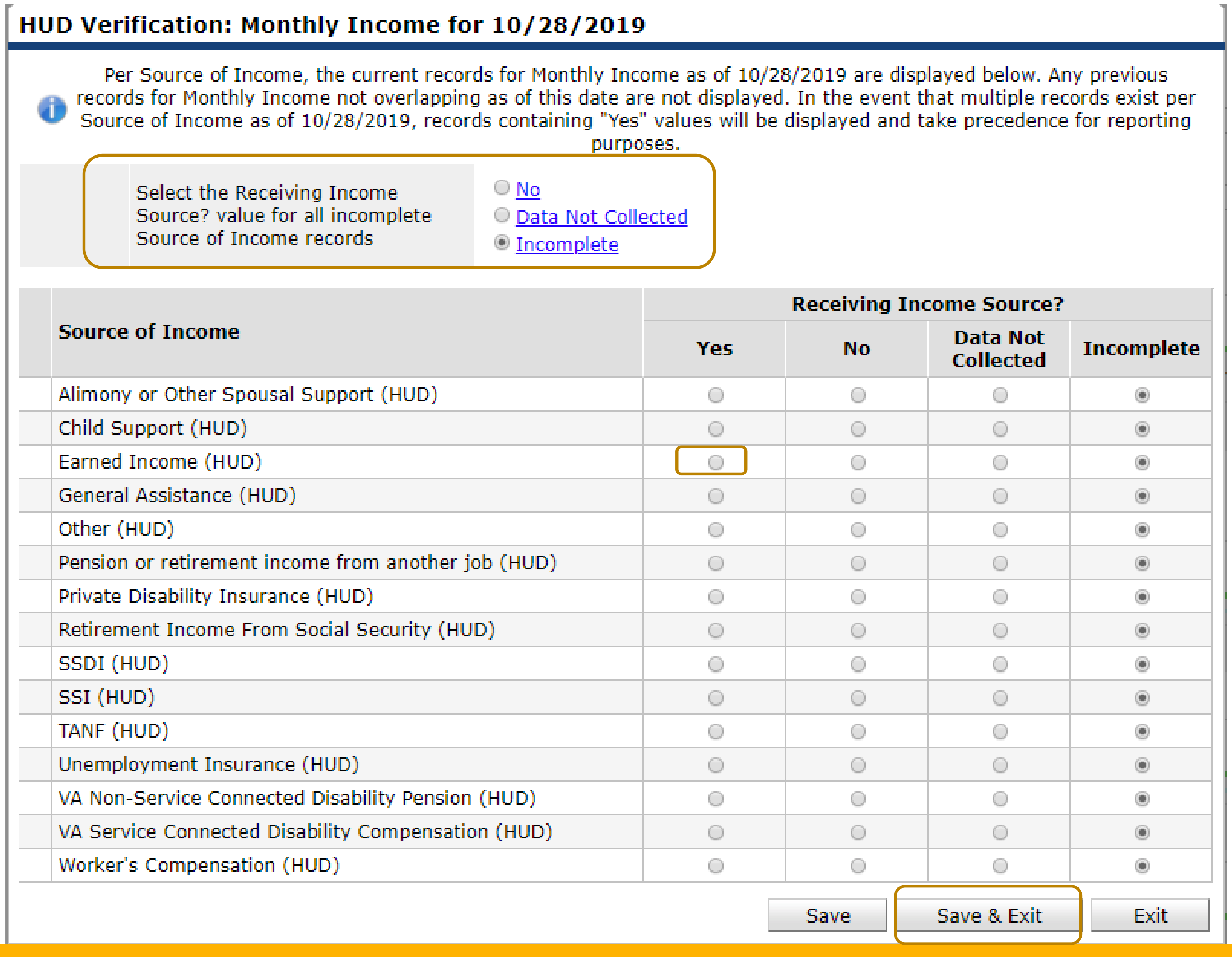


Income from Any Source: -Select-

Monthly Income

Receiving Income Source?	Source of Income	Monthly Amount	**Start Date** *	End Date

Total Monthly Income:



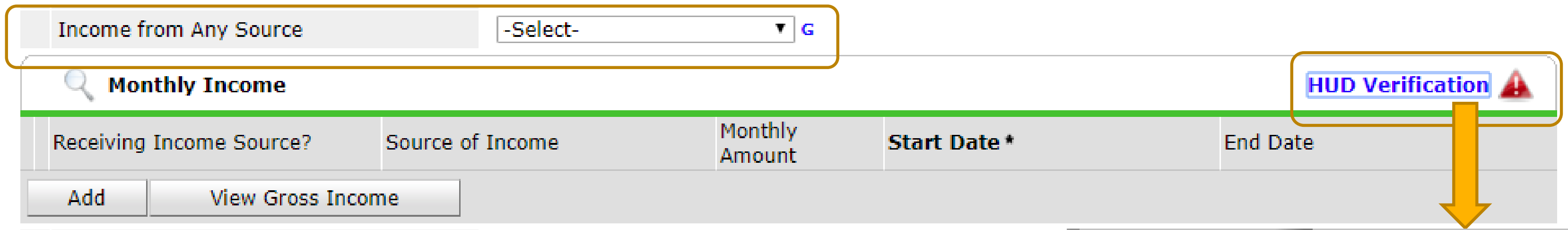
HUD Verification: Monthly Income for 10/28/2019

Per Source of Income, the current records for Monthly Income as of 10/28/2019 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records: ○ No ○ Data Not Collected ● Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	○	○	○	●
Child Support (HUD)	○	○	○	●
Earned Income (HUD)	○	○	○	●
General Assistance (HUD)	○	○	○	●
Other (HUD)	○	○	○	●
Pension or retirement income from another job (HUD)	○	○	○	●
Private Disability Insurance (HUD)	○	○	○	●
Retirement Income From Social Security (HUD)	○	○	○	●
SSDI (HUD)	○	○	○	●
SSI (HUD)	○	○	○	●
TANF (HUD)	○	○	○	●
Unemployment Insurance (HUD)	○	○	○	●
VA Non-Service Connected Disability Pension (HUD)	○	○	○	●
VA Service Connected Disability Compensation (HUD)	○	○	○	●
Worker's Compensation (HUD)	○	○	○	●

- Begin by setting all incomplete values to "No"
- For each source of income, add the income source, receiving income source = Yes, monthly amount and start date.
- Once all income sources have been recorded via the HUD Verification, click "Save & Exit"

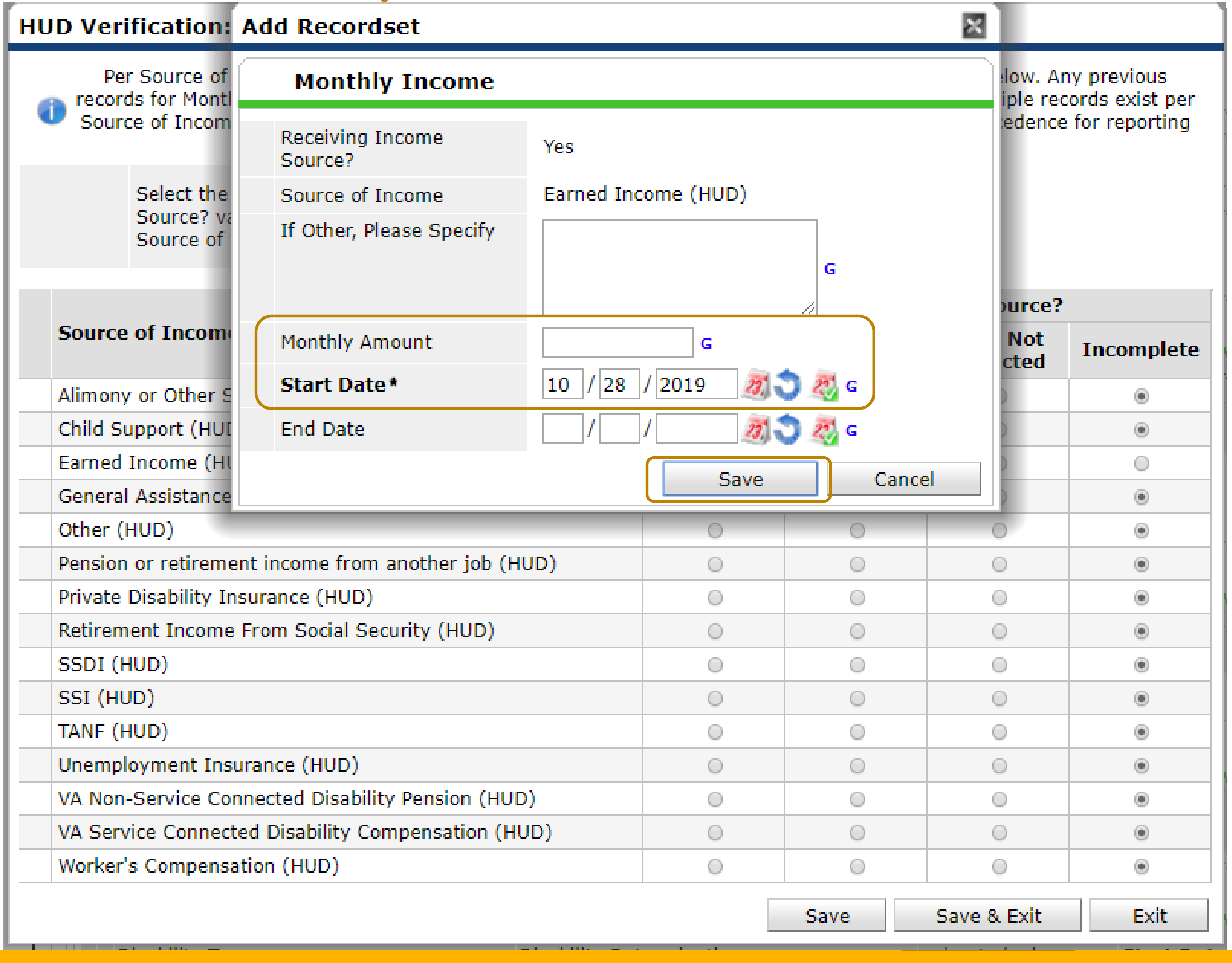


Income from Any Source	-Select- ▾ G

Monthly Income

Receiving Income Source?	Source of Income	Monthly Amount	**Start Date ***	End Date

Total Monthly Income	G



HUD Verification: Add Recordset

Per Source of … records for Mont… Source of Incom… …low. Any previous …iple records exist per …edence for reporting

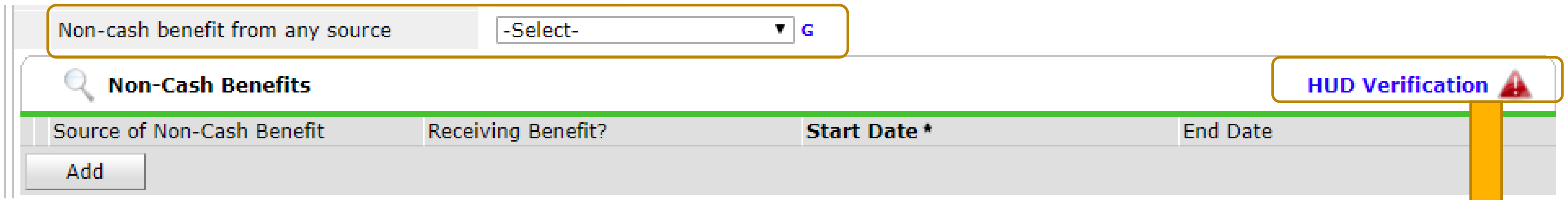
Select the … Source? v… Source of …

Monthly Income

Receiving Income Source?	Yes
Source of Income	Earned Income (HUD)
If Other, Please Specify	G
Monthly Amount	G
Start Date *	10 / 28 / 2019 G
End Date	/ / G

Source of Incom…			**…urce?** **Not …cted**	**Incomplete**
Alimony or Other S…				●
Child Support (HU…				●
Earned Income (H…				○
General Assistance…				●
Other (HUD)	○	○	○	●
Pension or retirement income from another job (HUD)	○	○	○	●
Private Disability Insurance (HUD)	○	○	○	●
Retirement Income From Social Security (HUD)	○	○	○	●
SSDI (HUD)	○	○	○	●
SSI (HUD)	○	○	○	●
TANF (HUD)	○	○	○	●
Unemployment Insurance (HUD)	○	○	○	●
VA Non-Service Connected Disability Pension (HUD)	○	○	○	●
VA Service Connected Disability Compensation (HUD)	○	○	○	●
Worker's Compensation (HUD)	○	○	○	●

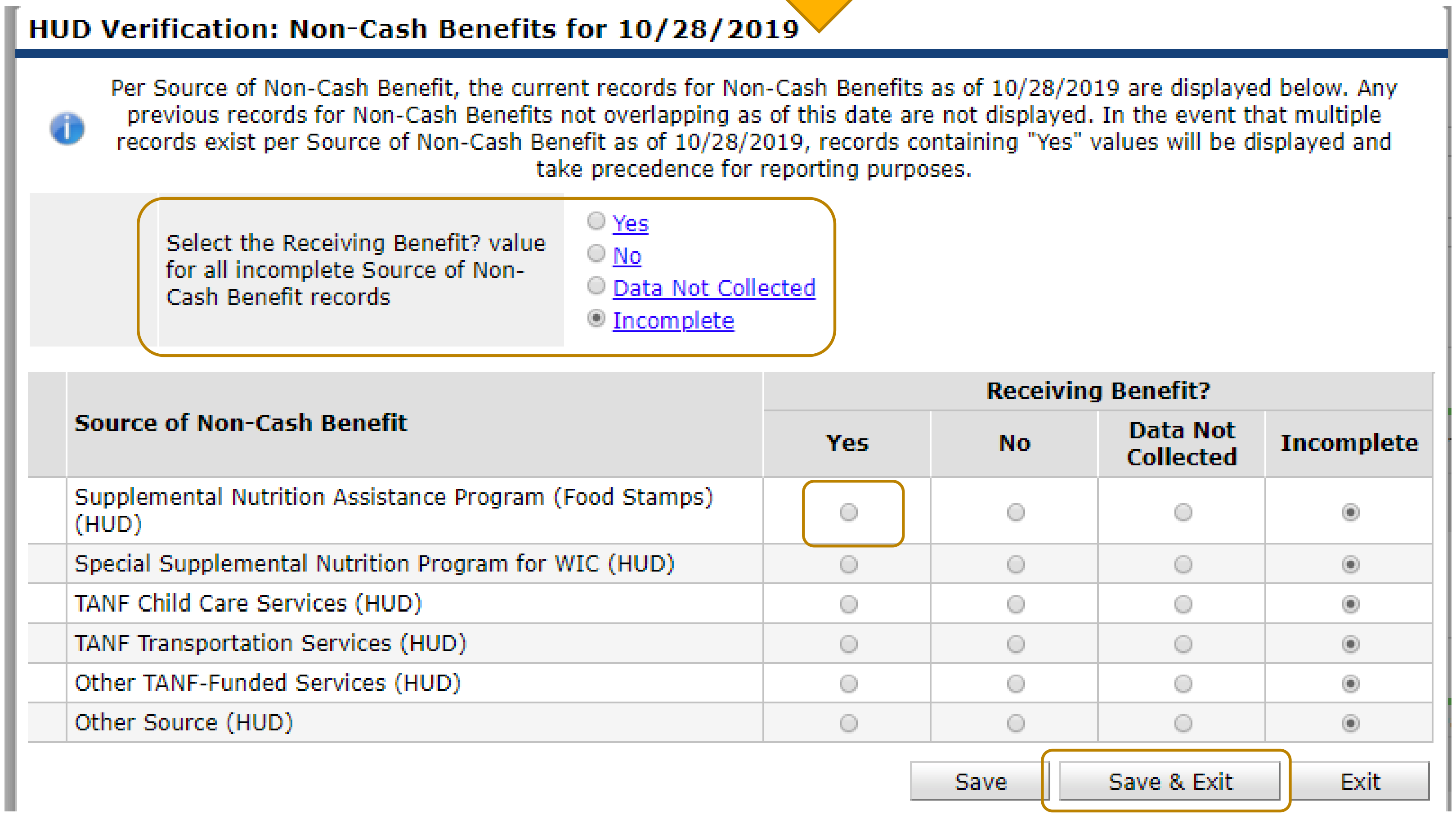
- Begin by setting all incomplete values to “No”
- For each source of income, add the income source, receiving income source = Yes, monthly amount and start date.
- Once all income sources have been recorded via the HUD Verification, click “Save & Exit”


Non-cash benefit from any source: -Select-

Non-Cash Benefits

Source of Non-Cash Benefit	Receiving Benefit?	Start Date *	End Date

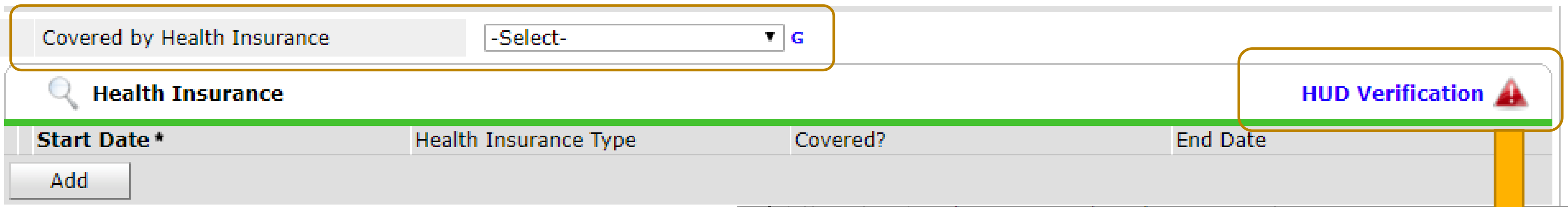
- Begin by setting all incomplete values to “No”
- For each source of Non-Cash Benefits, add the Non-Cash Benefit source, receiving benefit = “Yes”, and start date
- Once all Non-Cash sources have been recorded via the HUD Verification, click “Save & Exit”


HUD Verification: Non-Cash Benefits for 10/28/2019

Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 10/28/2019 are displayed below. Any previous records for Non-Cash Benefits not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Non-Cash Benefit as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefit records
○ Yes
○ No
○ Data Not Collected
● Incomplete

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	○	○	○	●
Special Supplemental Nutrition Program for WIC (HUD)	○	○	○	●
TANF Child Care Services (HUD)	○	○	○	●
TANF Transportation Services (HUD)	○	○	○	●
Other TANF-Funded Services (HUD)	○	○	○	●
Other Source (HUD)	○	○	○	●

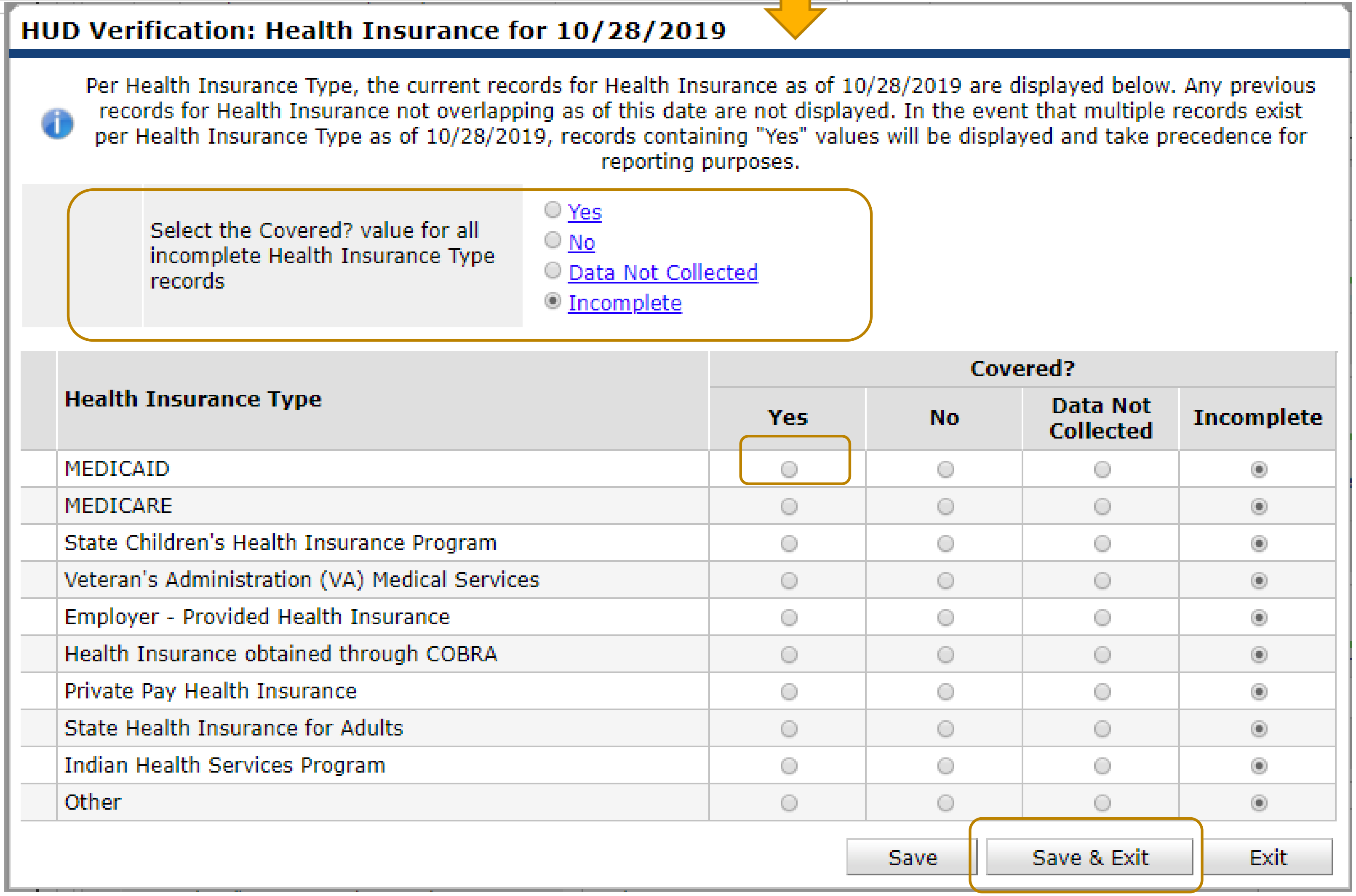


Covered by Health Insurance -Select- ▼ G

Health Insurance **HUD Verification**

Start Date *	Health Insurance Type	Covered?	End Date

- Begin by setting all incomplete values to “No”
- For each type of Health Insurance, add the Health Insurance type, covered? = “Yes”
- Once all Health Insurance sources have been recorded via the HUD Verification, click “Save & Exit”

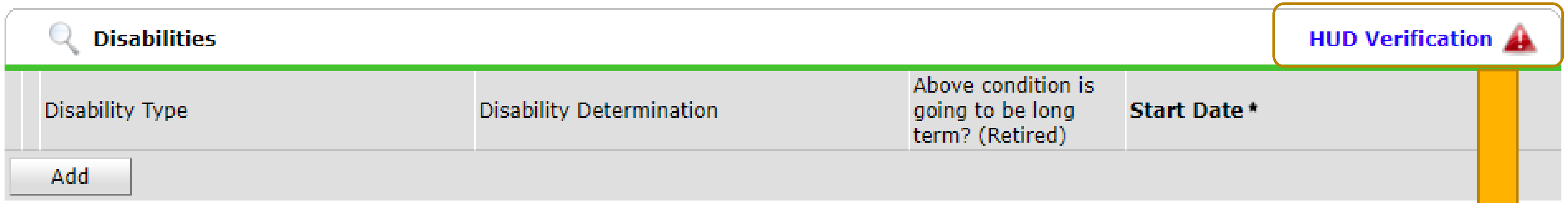


HUD Verification: Health Insurance for 10/28/2019

Per Health Insurance Type, the current records for Health Insurance as of 10/28/2019 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

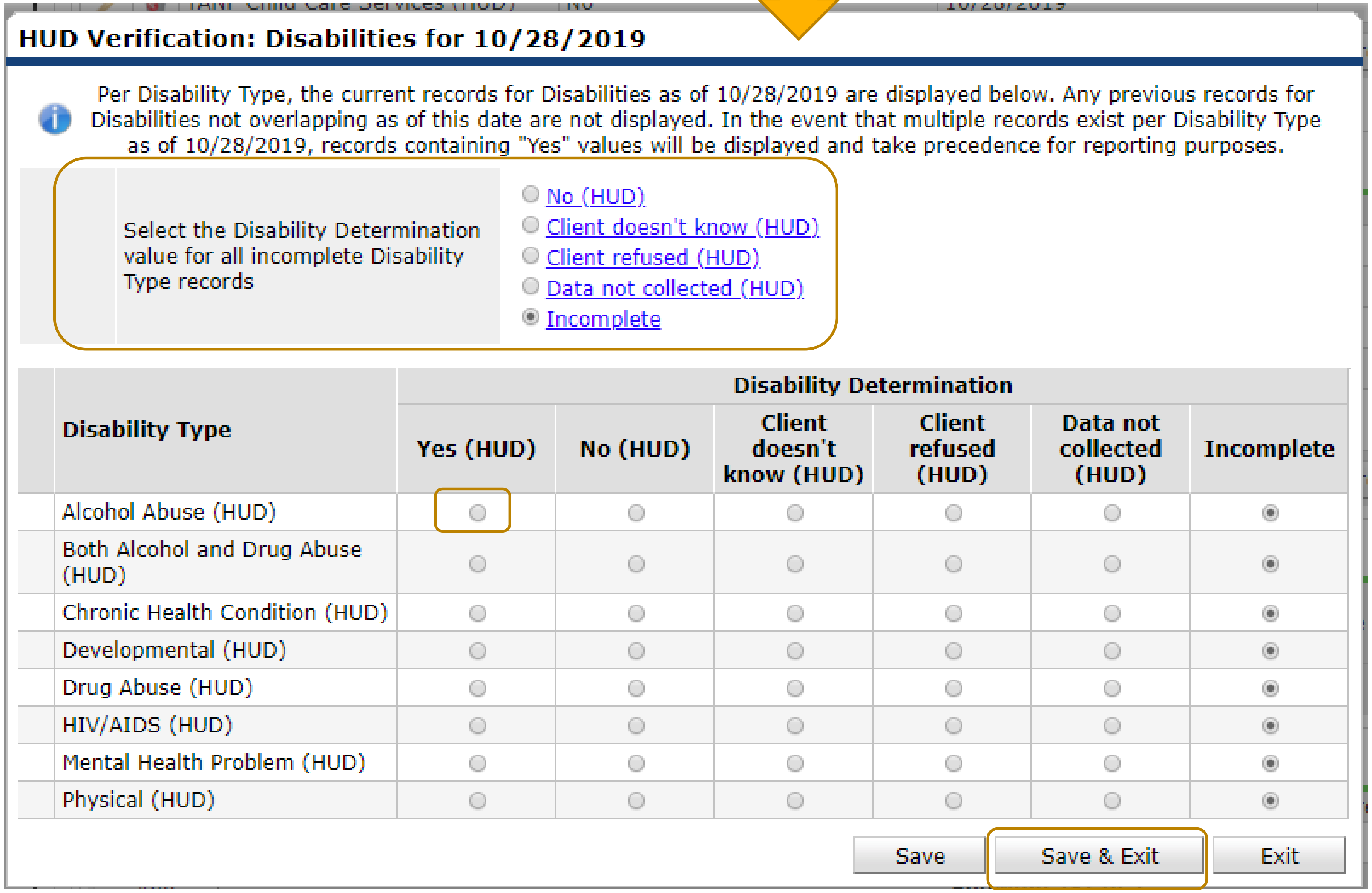
Select the Covered? value for all incomplete Health Insurance Type records
○ Yes
○ No
○ Data Not Collected
● Incomplete

Health Insurance Type	**Covered?**			
	Yes	**No**	**Data Not Collected**	**Incomplete**
MEDICAID	○	○	○	●
MEDICARE	○	○	○	●
State Children's Health Insurance Program	○	○	○	●
Veteran's Administration (VA) Medical Services	○	○	○	●
Employer - Provided Health Insurance	○	○	○	●
Health Insurance obtained through COBRA	○	○	○	●
Private Pay Health Insurance	○	○	○	●
State Health Insurance for Adults	○	○	○	●
Indian Health Services Program	○	○	○	●
Other	○	○	○	●



Disabilities

Disability Type	Disability Determination	Above condition is going to be long term? (Retired)	Start Date *



HUD Verification: Disabilities for 10/28/2019

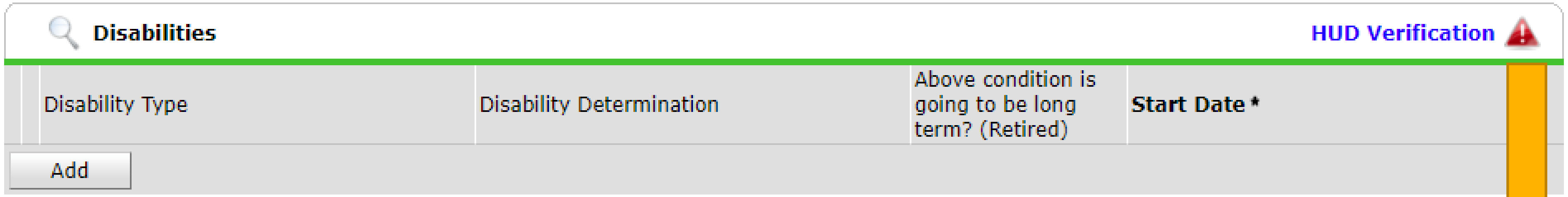
Per Disability Type, the current records for Disabilities as of 10/28/2019 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability Determination value for all incomplete Disability Type records

- ○ No (HUD)
- ○ Client doesn't know (HUD)
- ○ Client refused (HUD)
- ○ Data not collected (HUD)
- ● Incomplete

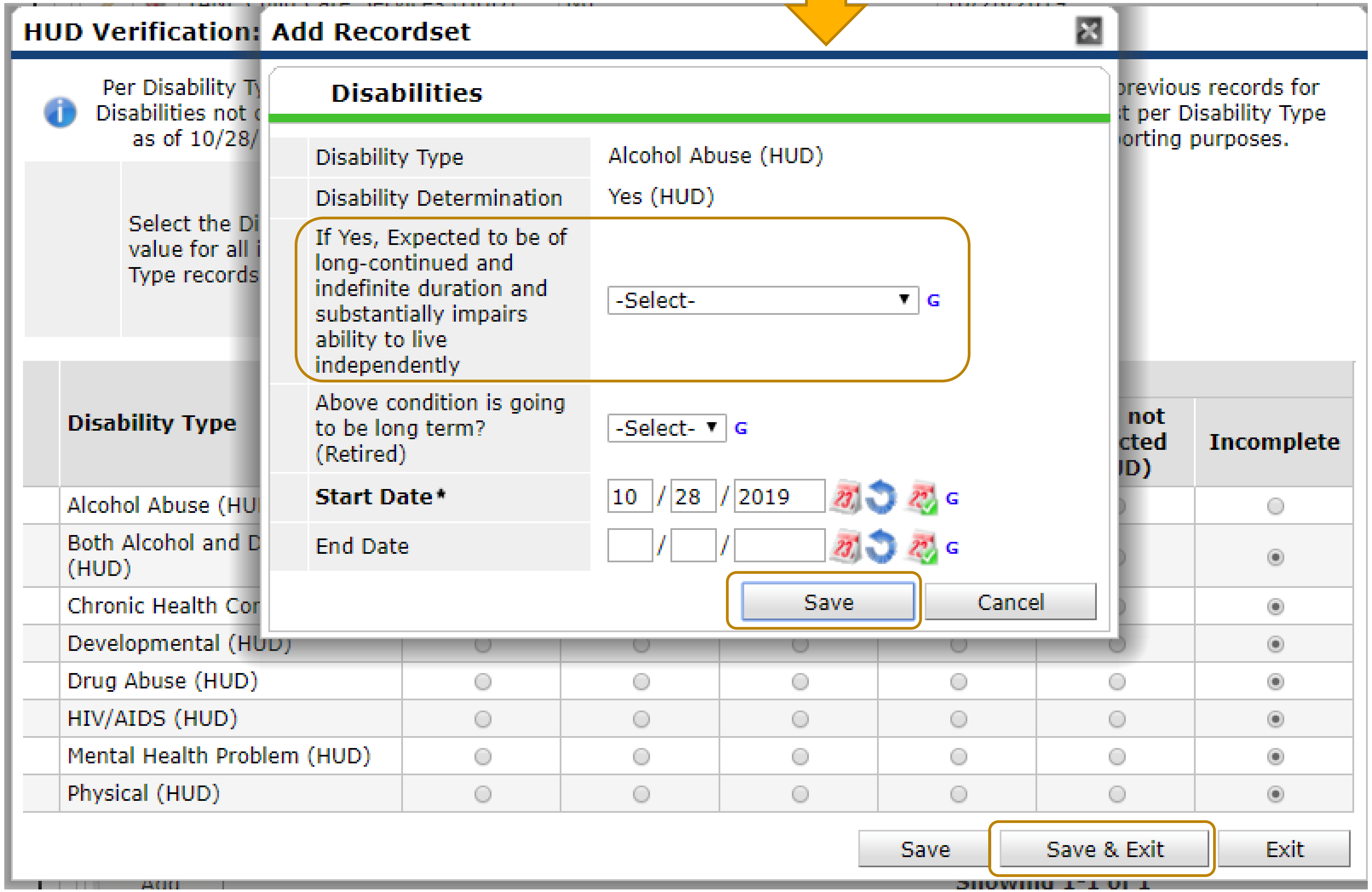
Disability Type	Disability Determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	○	○	○	○	○	●
Both Alcohol and Drug Abuse (HUD)	○	○	○	○	○	●
Chronic Health Condition (HUD)	○	○	○	○	○	●
Developmental (HUD)	○	○	○	○	○	●
Drug Abuse (HUD)	○	○	○	○	○	●
HIV/AIDS (HUD)	○	○	○	○	○	●
Mental Health Problem (HUD)	○	○	○	○	○	●
Physical (HUD)	○	○	○	○	○	●

- Begin by setting all incomplete values to “No”
- For each Disability, add the disability type, determination, duration, and start date.
- Once all Disabilities have been recorded via the HUD Verification, click “Save & Exit”



Disabilities HUD Verification

Disability Type	Disability Determination	Above condition is going to be long term? (Retired)	Start Date *



HUD Verification: Add Recordset

Per Disability Ty… Disabilities not c… as of 10/28/… …previous records for …t per Disability Type …orting purposes.

Select the Di… value for all i… Type records…

Disabilities

Disability Type	Alcohol Abuse (HUD)
Disability Determination	Yes (HUD)
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select-
Above condition is going to be long term? (Retired)	-Select-
Start Date*	10 / 28 / 2019
End Date	/ /

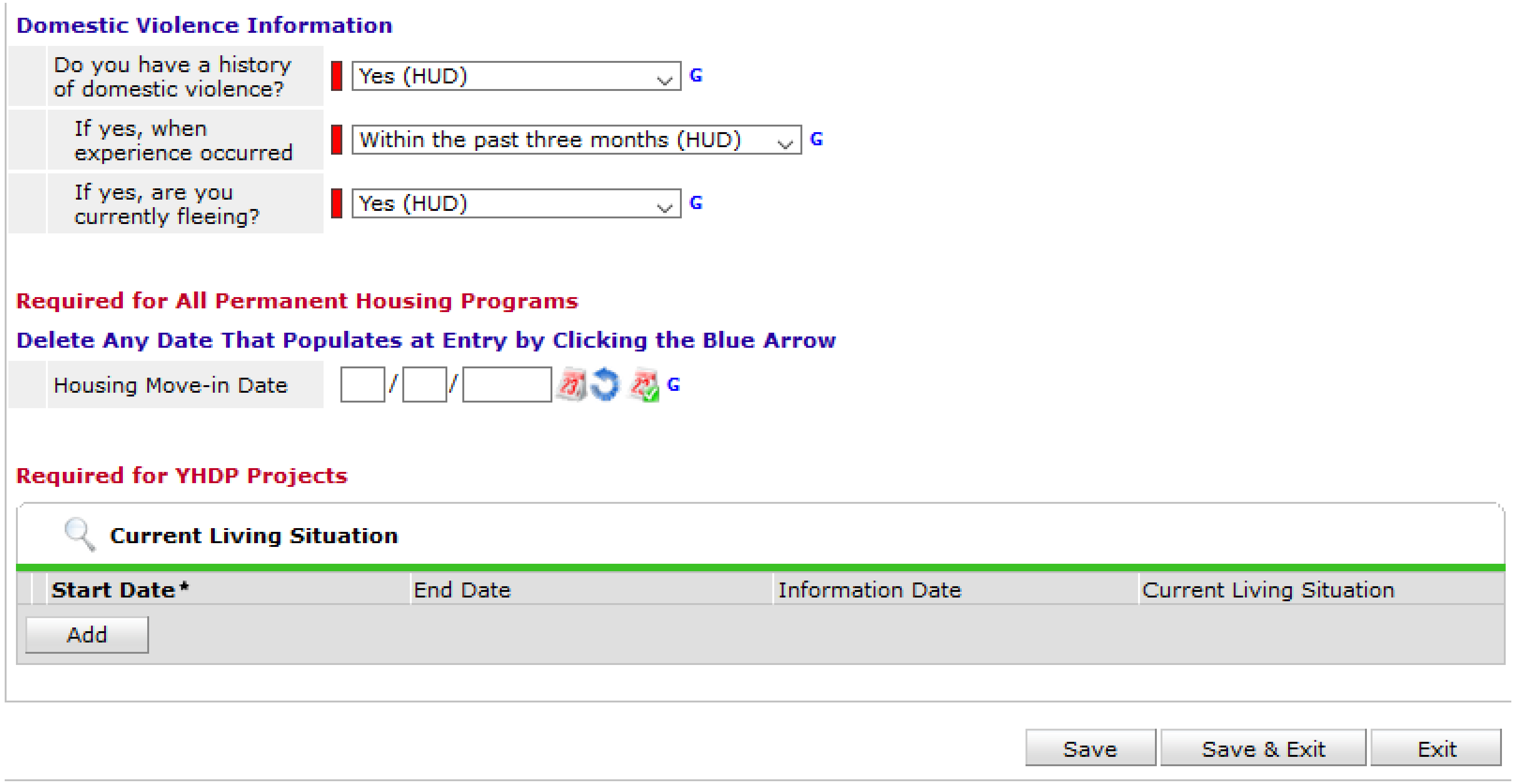
Disability Type	… not …cted …D)	**Incomplete**
Alcohol Abuse (HU…	○	○
Both Alcohol and D… (HUD)	○	●
Chronic Health Co…	○	●
Developmental (HUD)	○	●
Drug Abuse (HUD)	○	●
HIV/AIDS (HUD)	○	●
Mental Health Problem (HUD)	○	●
Physical (HUD)	○	●

- For each Disability, add the disability type, determination, duration, and start date.
- Once all Disabilities have been recorded via the HUD Verification, click “Save & Exit”

- Domestic Violence Questions should be completed for Heads of Households and Adults.
    - Verification is not necessary unless required by your funder.

- Housing Move-In-Date is required for Rapid Rehousing and Permanent Housing only.

- The Current Living Situation (CLS) sub-assessment replaces the “Contact” sub-assessment from previous years. It is required for YHDP Projects and Street Outreach Projects Only.
    - A CLS should be created each time a client has been directly contacted in a *meaningful* way.
    - This should be recorded for **Heads of Household** for each occurrence.



Domestic Violence Information

Do you have a history of domestic violence?: Yes (HUD)

If yes, when experience occurred: Within the past three months (HUD)

If yes, are you currently fleeing?: Yes (HUD)

Required for All Permanent Housing Programs

Delete Any Date That Populates at Entry by Clicking the Blue Arrow

Housing Move-in Date: / /

Required for YHDP Projects

Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation

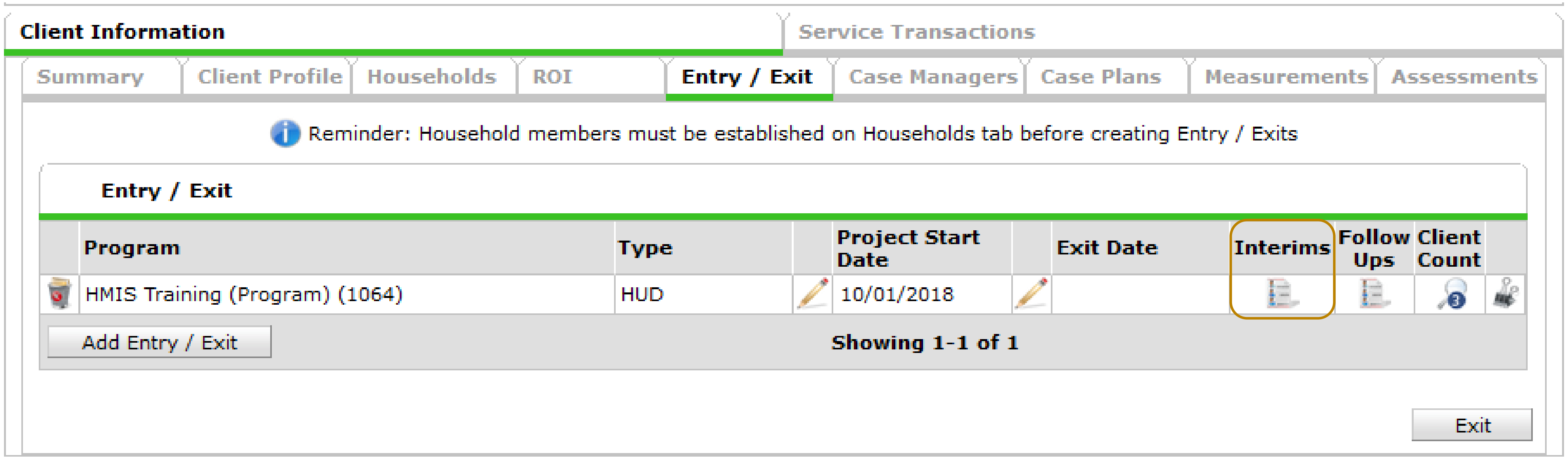

End
Demo

Section 2: The Household is in your Program

Part 1: Updates and Annual Assessments

- **Updates** are required for some data elements.
- **Annual Assessments** are required to be entered within +/- 30 days of the Head of Household's Entry Anniversary.
- Updates and Annual Assessments have fewer questions to complete and/or update compared to the Entry Assessment.
- If you do not complete these, the system does not recognize the change in income and non-cash benefits that occur.

Creating an Update/Annual Assessment



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

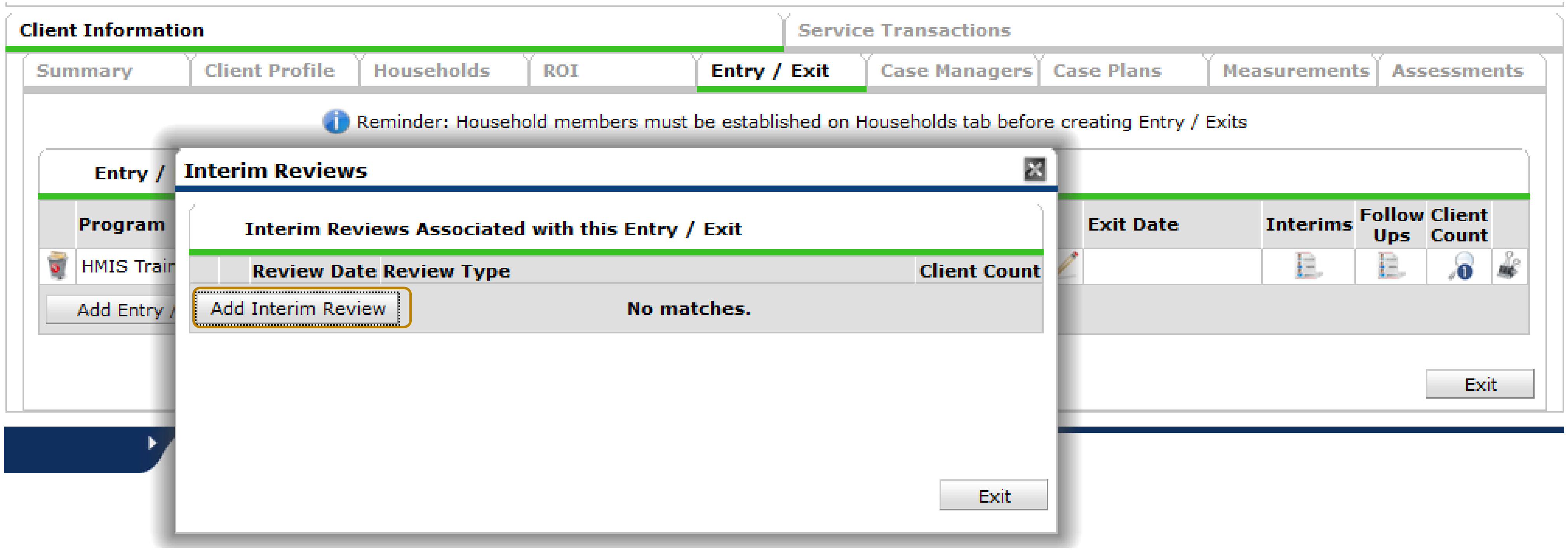
Entry / Exit

	Program	Type		Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
	HMIS Training (Program) (1064)	HUD		10/01/2018						

Showing 1-1 of 1

HTTP://WWW.COMMUNITY-PARTNERSHIP.ORG/

Creating an Update/Annual Assessment



Client Information

Service Transactions

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

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

Entry /

	Program	Exit Date	Interims	Follow Ups	Client Count
	HMIS Trair				

Add Entry /

Exit

Interim Reviews

Interim Reviews Associated with this Entry / Exit

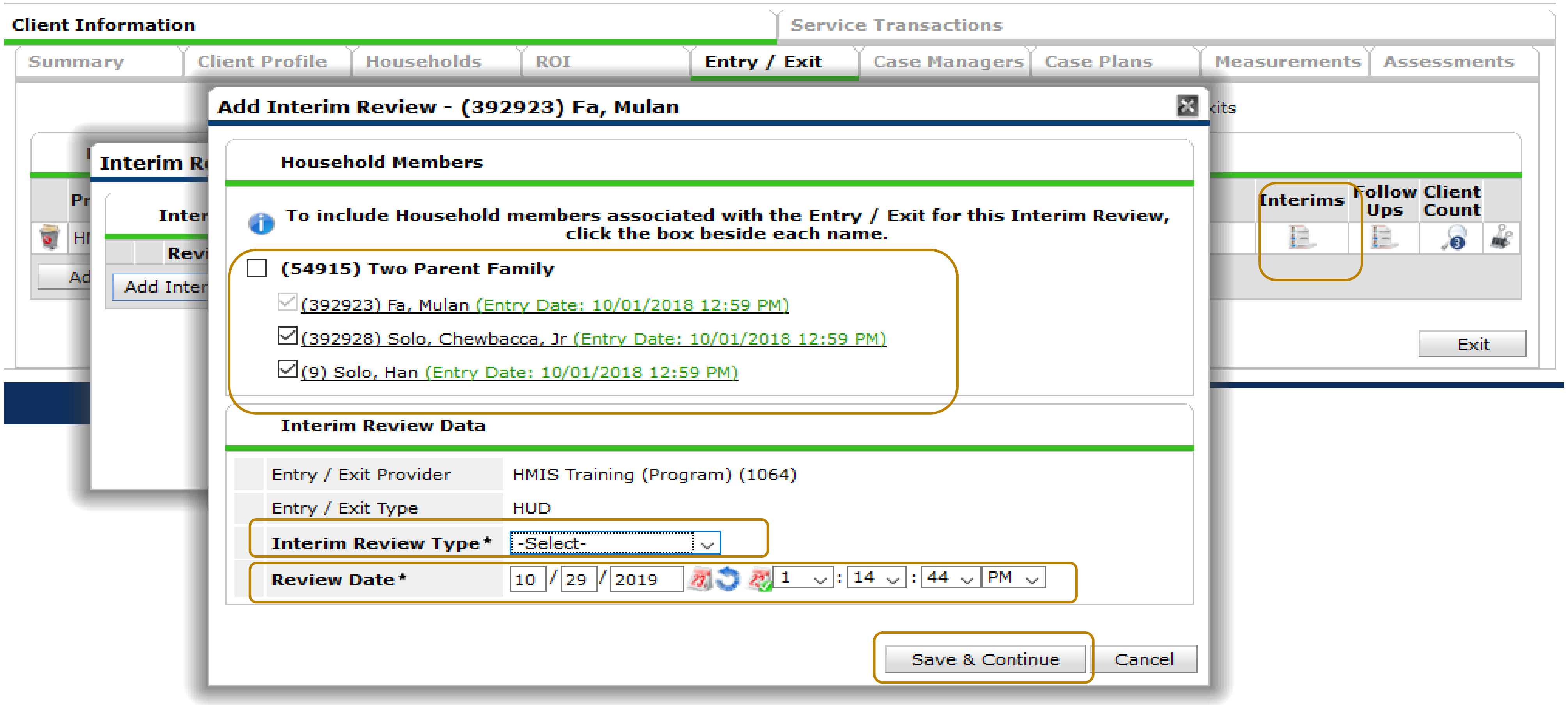
	Review Date	Review Type	Client Count

Add Interim Review

No matches.

Exit

Creating an Update/Annual Assessment



Add Interim Review - (392923) Fa, Mulan

Household Members

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

☐ **(54915) Two Parent Family**

☑ (392923) Fa, Mulan (Entry Date: 10/01/2018 12:59 PM)

☑ (392928) Solo, Chewbacca, Jr (Entry Date: 10/01/2018 12:59 PM)

☑ (9) Solo, Han (Entry Date: 10/01/2018 12:59 PM)

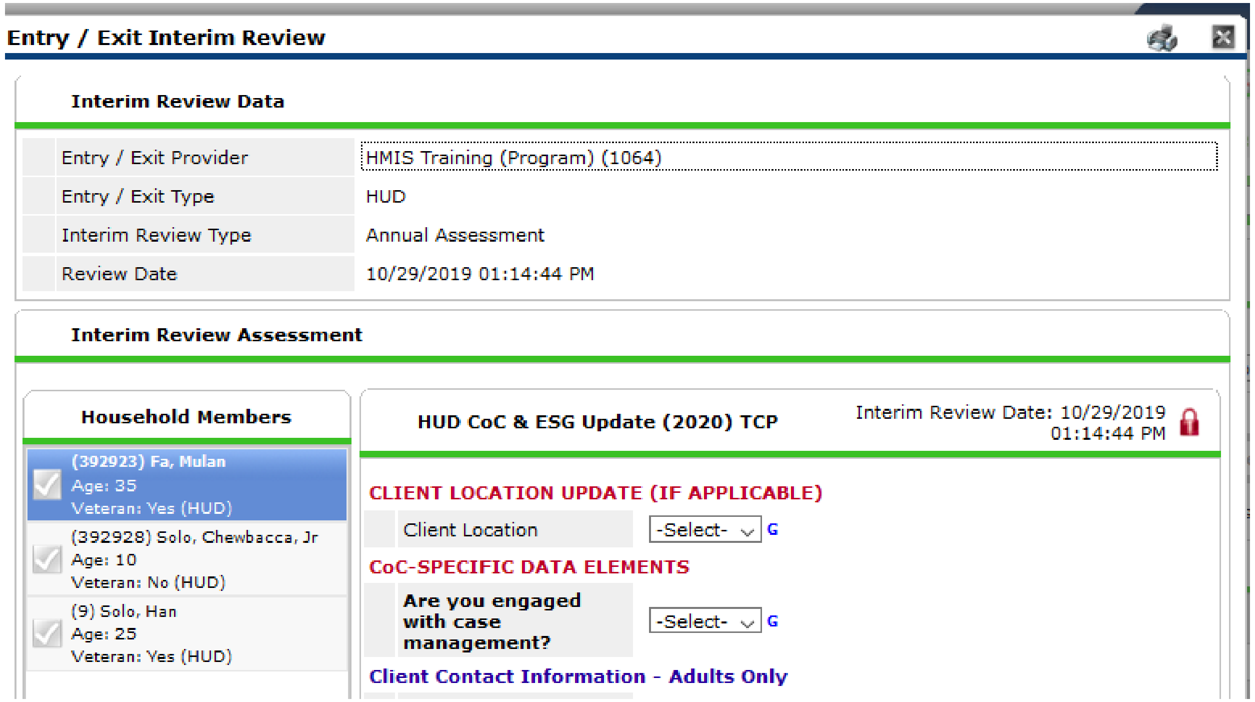
Interim Review Data

Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type*	-Select-
Review Date*	10 / 29 / 2019 1 : 14 : 44 PM

Save & Continue | Cancel

Interim Review Assessment

- The questions in the Interim review(Update or Annual Assessment) will depend upon the funding source of your program.
- Interim reviews generally contain data elements that may change over time.
- Review all information in the Interim Review to ensure it is still up-to-date. Make updates as needed.



Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type	Annual Assessment
Review Date	10/29/2019 01:14:44 PM

Interim Review Assessment

Household Members

- ☑ (392923) Fa, Mulan
Age: 35
Veteran: Yes (HUD)
- ☑ (392928) Solo, Chewbacca, Jr
Age: 10
Veteran: No (HUD)
- ☑ (9) Solo, Han
Age: 25
Veteran: Yes (HUD)

HUD CoC & ESG Update (2020) TCP

Interim Review Date: 10/29/2019 01:14:44 PM

CLIENT LOCATION UPDATE (IF APPLICABLE)

Client Location: -Select-

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management? -Select-

Client Contact Information - Adults Only

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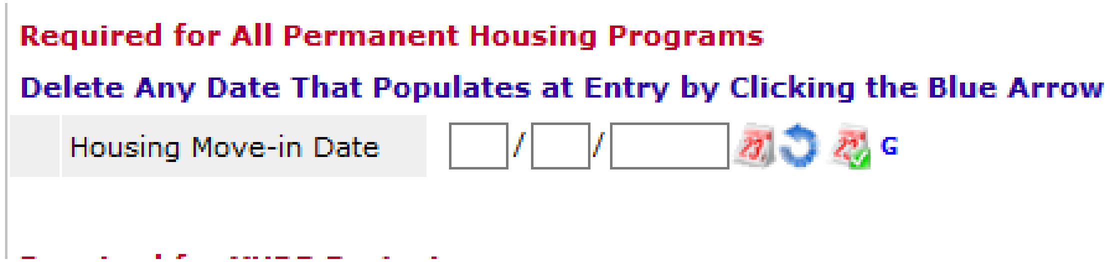
The Community Partnership
For The Prevention
of Homelessness

Rapid Re-housing and Permanent Housing

Housing Move In Date



Required for All Permanent Housing Programs

Delete Any Date That Populates at Entry by Clicking the Blue Arrow

Housing Move-in Date ☐/☐/☐ G

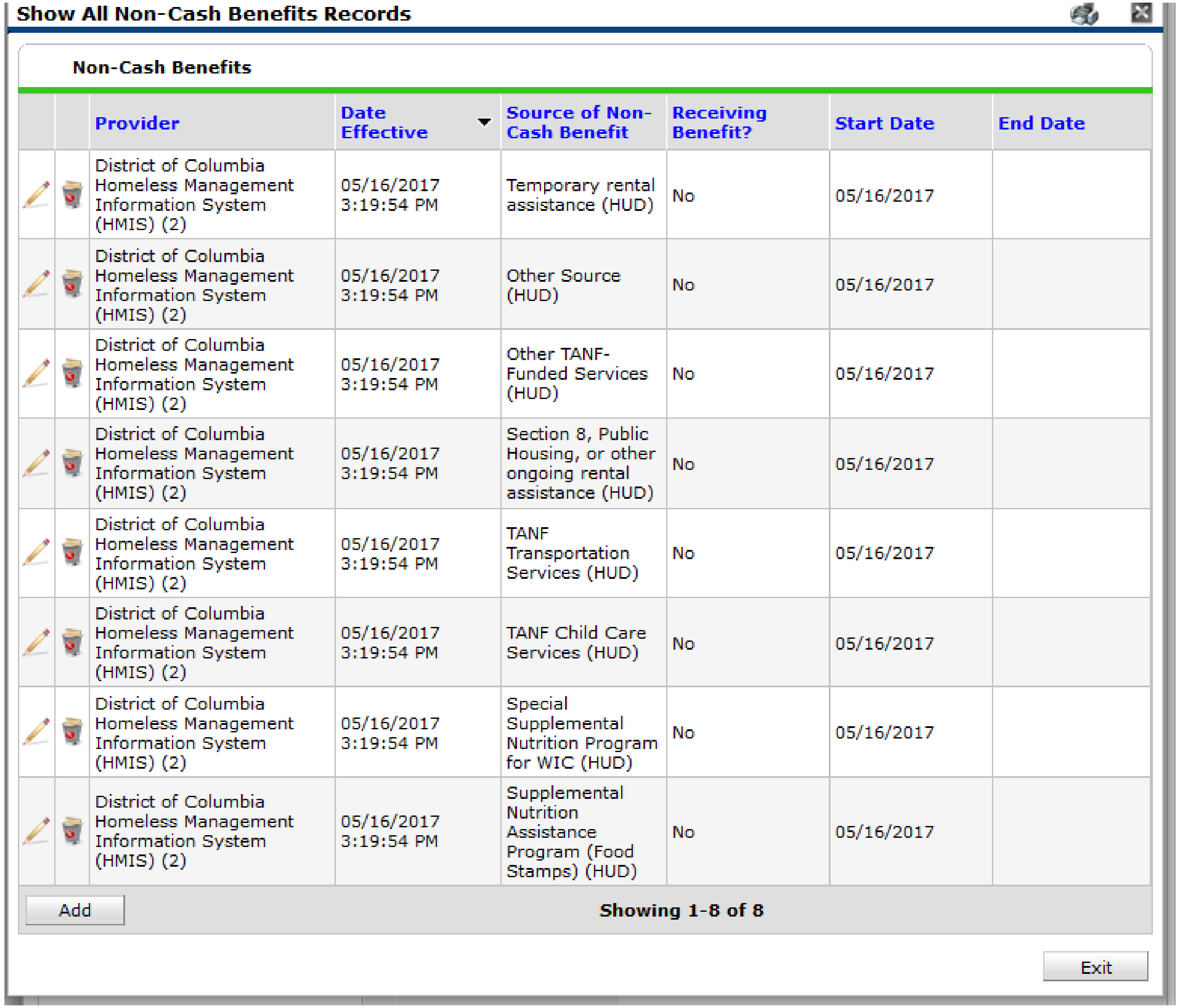
- For clients with a Project Start Date in a permanent housing project of any kind (including Rapid Re-housing), record the date a client or household moves into a permanent housing unit.
- When Entering a client into your program, you will want to make sure any Date that populates in the Housing Move-in Date is cleared so that the new, correct date may be entered for your program.
- This Housing Move-in Date **MAY** be the same date as the Entry Date, but more likely it will occur AFTER the entry date.
  - IF it is on the same date as the Entry Date you MAY enter it on the Entry Assessment.
  - If it is AFTER the Entry Date, you MUST enter it in an Update.
- It is also possible that you may begin serving the client with the housing search, but end up unable to house the client. In this case the Housing Move-in Date will remain Blank and the client will be exited from your program.

Updating Sub-assessments

- If information in a sub-assessment has changed, we need to end the old information, and create new, accurate information.
- We do not want to Delete any information that used to be correct.
- We will add an End Date to the information that is no longer true, and then Add a new line in the sub-assessment with the new information.

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.



Non-Cash Benefits

		Provider	Date Effective	Source of Non-Cash Benefit	Receiving Benefit?	Start Date	End Date
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF-Funded Services (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
		District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	

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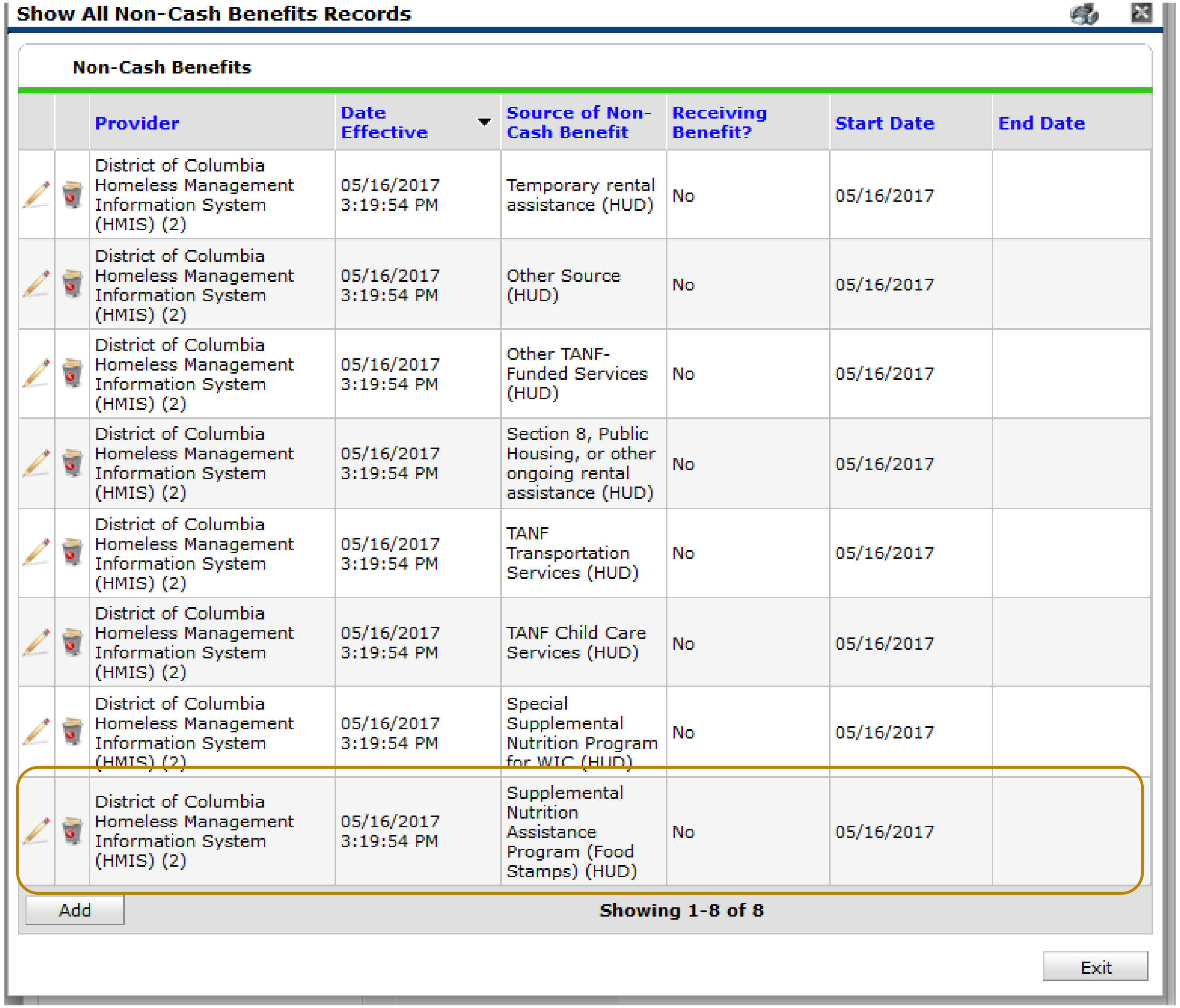
Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.



Show All Non-Cash Benefits Records

Non-Cash Benefits

Provider	Date Effective	Source of Non-Cash Benefit	Receiving Benefit?	Start Date	End Date
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF-Funded Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	

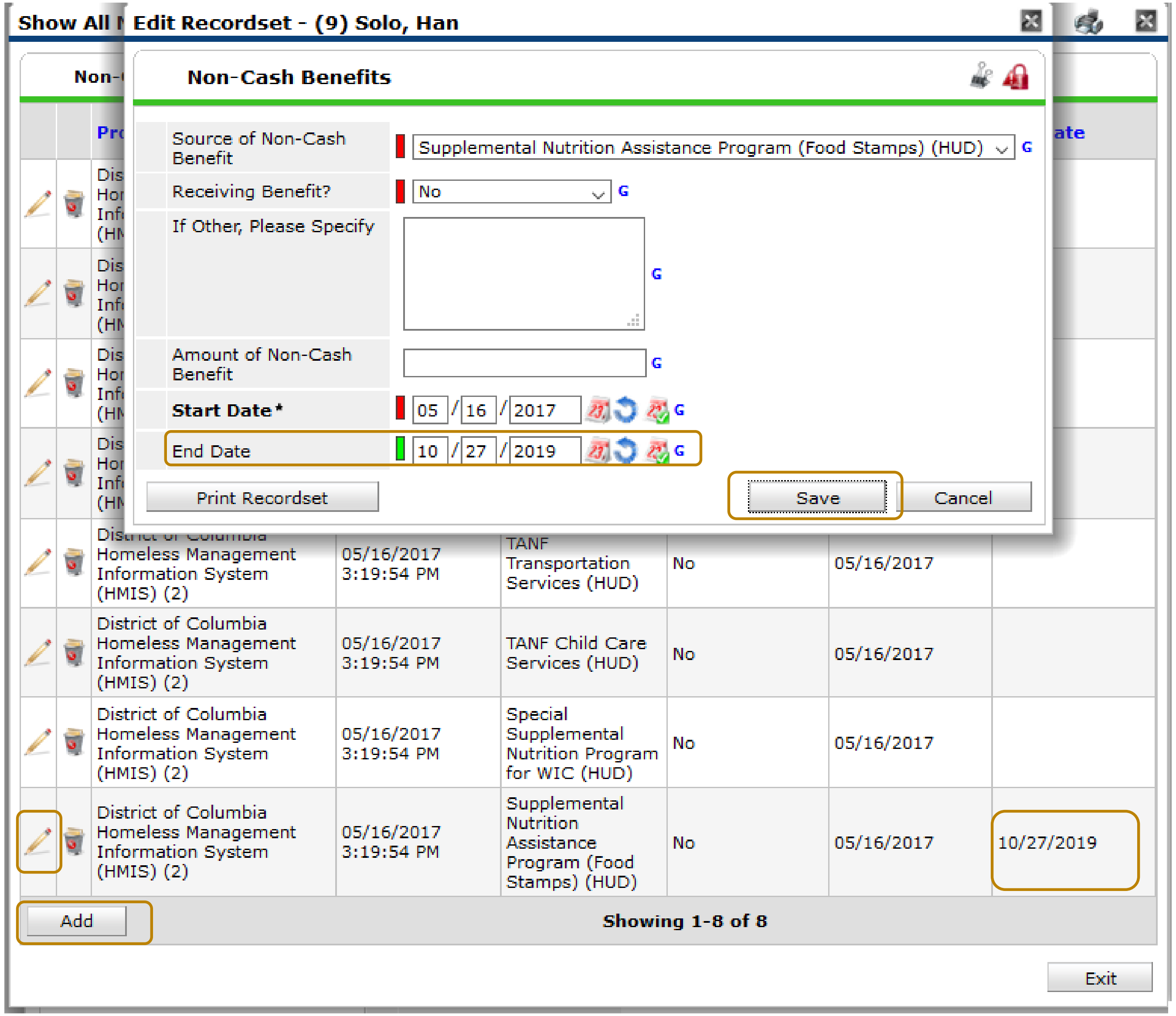
Showing 1-8 of 8

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.



Edit Recordset - (9) Solo, Han

Non-Cash Benefits

Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD)
Receiving Benefit?: No
If Other, Please Specify:
Amount of Non-Cash Benefit:
Start Date*: 05 / 16 / 2017
End Date: 10 / 27 / 2019

Dis Hor Inf (HM					
Dis Hor Inf (HM					
Dis Hor Inf (HM					
Dis Hor Inf (HM					
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	10/27/2019

Showing 1-8 of 8

Here we have the details of the Non-Cash Benefits sub-assessment.

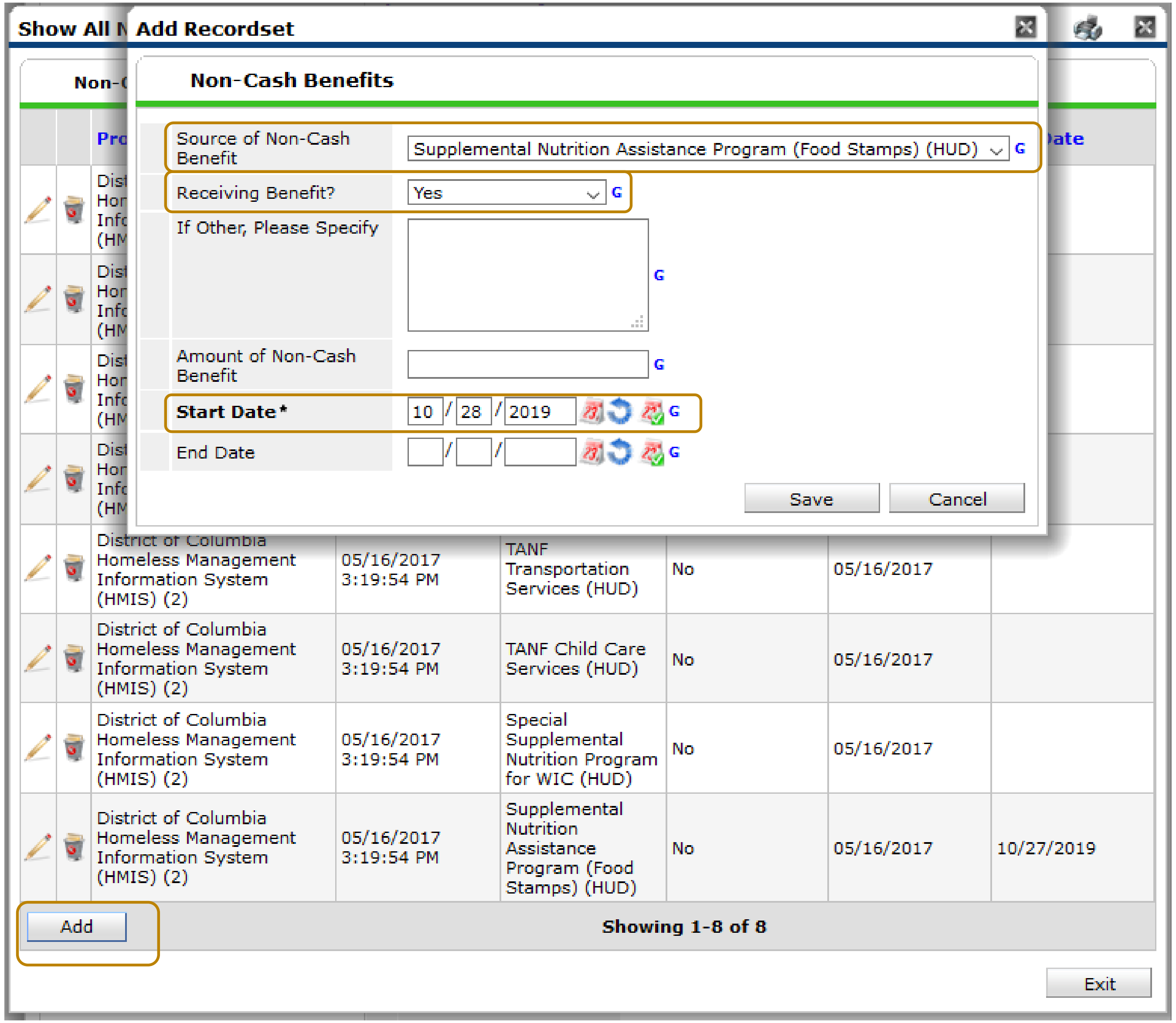
In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.

Since the client is receiving food stamps now, I answer "Receiving Benefit" = "Yes.

The Start Date = today's date.



Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD)

Receiving Benefit?: Yes

If Other, Please Specify:

Amount of Non-Cash Benefit:

Start Date*: 10 / 28 / 2019

End Date: / /

District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	10/27/2019

Showing 1-8 of 8


End
Demo

Section 2: The Household is in your Program

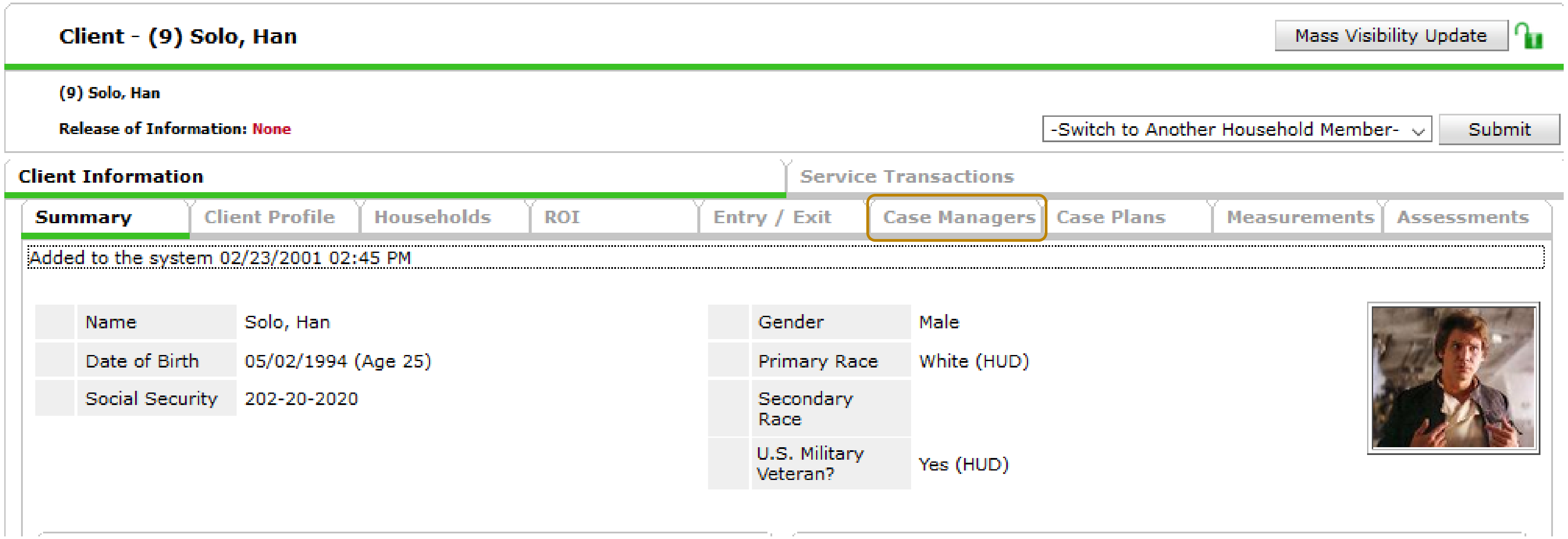
Part 2: Case Plans

- Case Plans are required for all DHS and TCP programs

- There are multiple parts to case plans – detailed in the following slides.

Adding a Case Manager

Step One: Go the **Case Managers** tab on the client profile screen:



Client - (9) Solo, Han

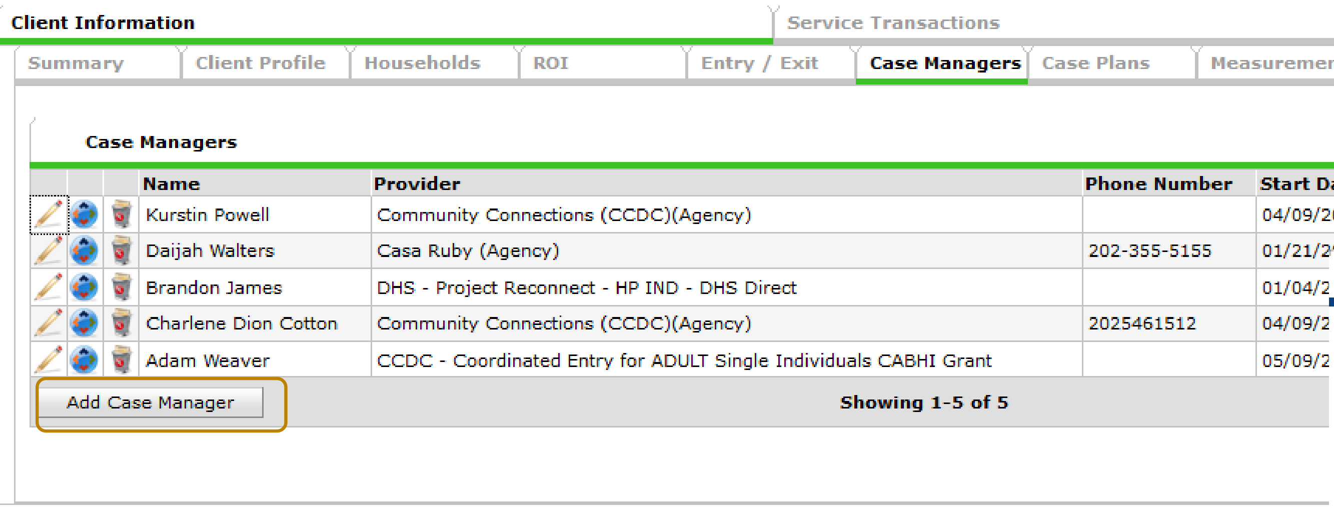
(9) Solo, Han

Release of Information: None

Added to the system 02/23/2001 02:45 PM

Name	Solo, Han
Date of Birth	05/02/1994 (Age 25)
Social Security	202-20-2020
Gender	Male
Primary Race	White (HUD)
Secondary Race	
U.S. Military Veteran?	Yes (HUD)

This will take you to the **Case Managers** data entry screen.



Client Information | Service Transactions

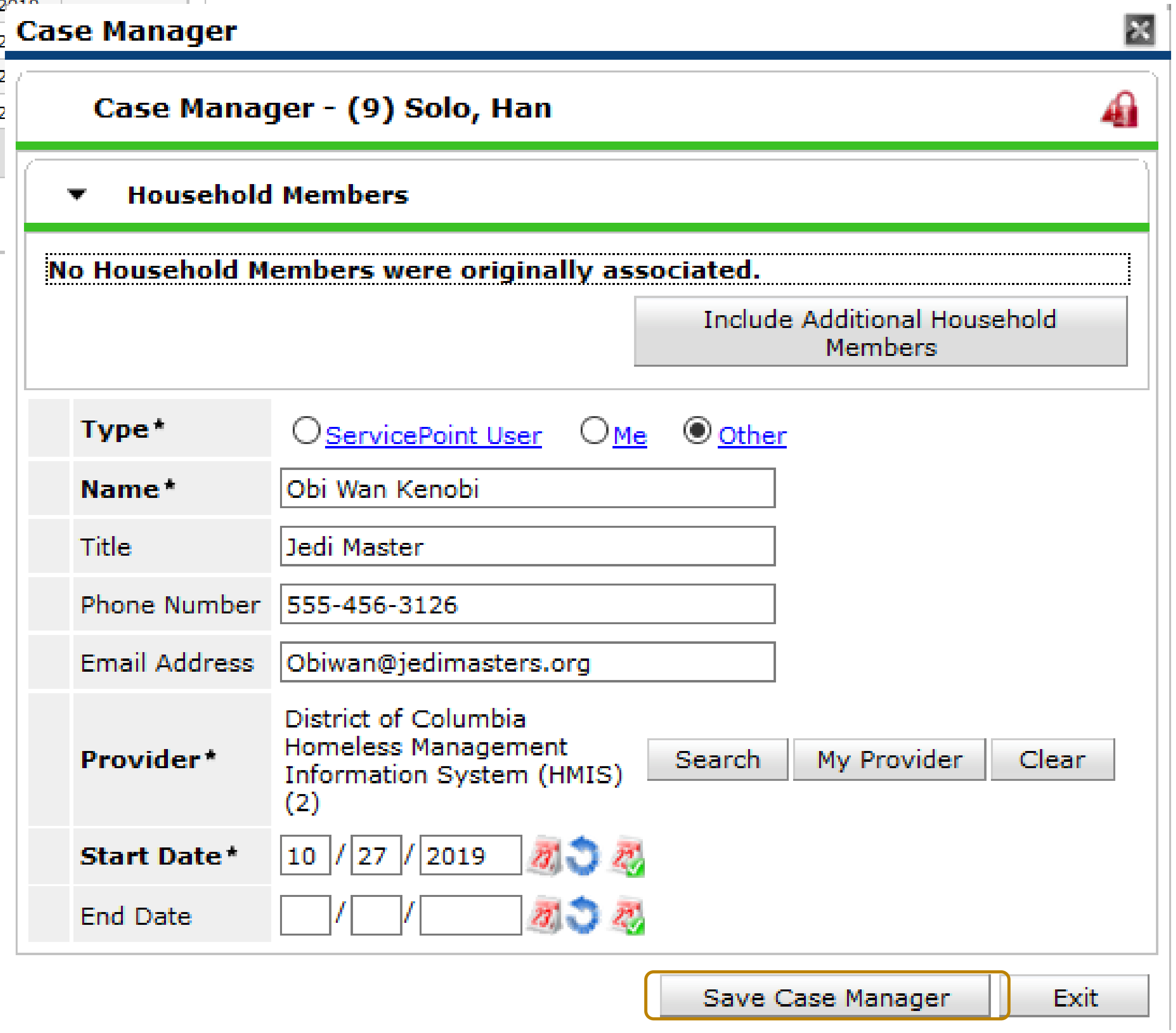
Summary | Client Profile | Households | ROI | Entry / Exit | **Case Managers** | Case Plans | Measurements | Assessments

Case Managers

Name	Provider	Phone Number	Start Date	End Date
Kurstin Powell	Community Connections (CCDC)(Agency)		04/09/2019	
Daijah Walters	Casa Ruby (Agency)	202-355-5155	01/21/2	
Brandon James	DHS - Project Reconnect - HP IND - DHS Direct		01/04/2	
Charlene Dion Cotton	Community Connections (CCDC)(Agency)	2025461512	04/09/2	
Adam Weaver	CCDC - Coordinated Entry for ADULT Single Individuals CABHI Grant		05/09/2	

Add Case Manager

Showing 1-5 of 5



Case Manager

Case Manager - (9) Solo, Han

Household Members

No Household Members were originally associated.

Include Additional Household Members

Type*: ○ ServicePoint User ○ Me ● Other

Name*: Obi Wan Kenobi

Title: Jedi Master

Phone Number: 555-456-3126

Email Address: Obiwan@jedimasters.org

Provider*: District of Columbia Homeless Management Information System (HMIS) (2) | Search | My Provider | Clear

Start Date*: 10 / 27 / 2019

End Date: / /

Save Case Manager | Exit

- Choose whether the Case Manager is a ServicePoint User, Yourself, or someone else.
- Complete the contact information
- Click Save Case Manager

Case Manager FAQs

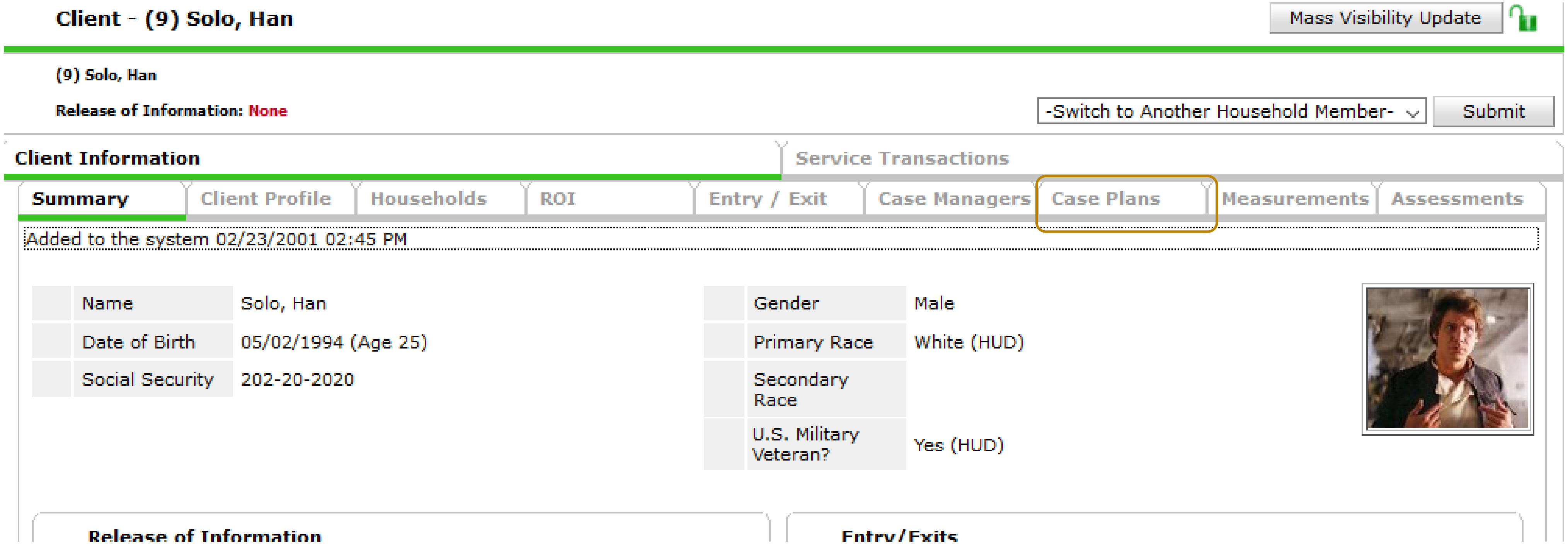
Can I add more than one case manager to a client's case manager tab?

Yes. In some cases a provider may have a case manager and other service staff person such as a housing specialist or employment specialist working with a given client.

How do I indicate that a case manager is no longer working with a given client?

The case managers data entry screen has Start Date and End Date Fields to indicate when a case manager begins and ends working with a given client. This is where a case manager can indicate that he is no longer working with a client.

Step One: Go the Case Plans tab in ClientPoint:



Client - (9) Solo, Han

(9) Solo, Han

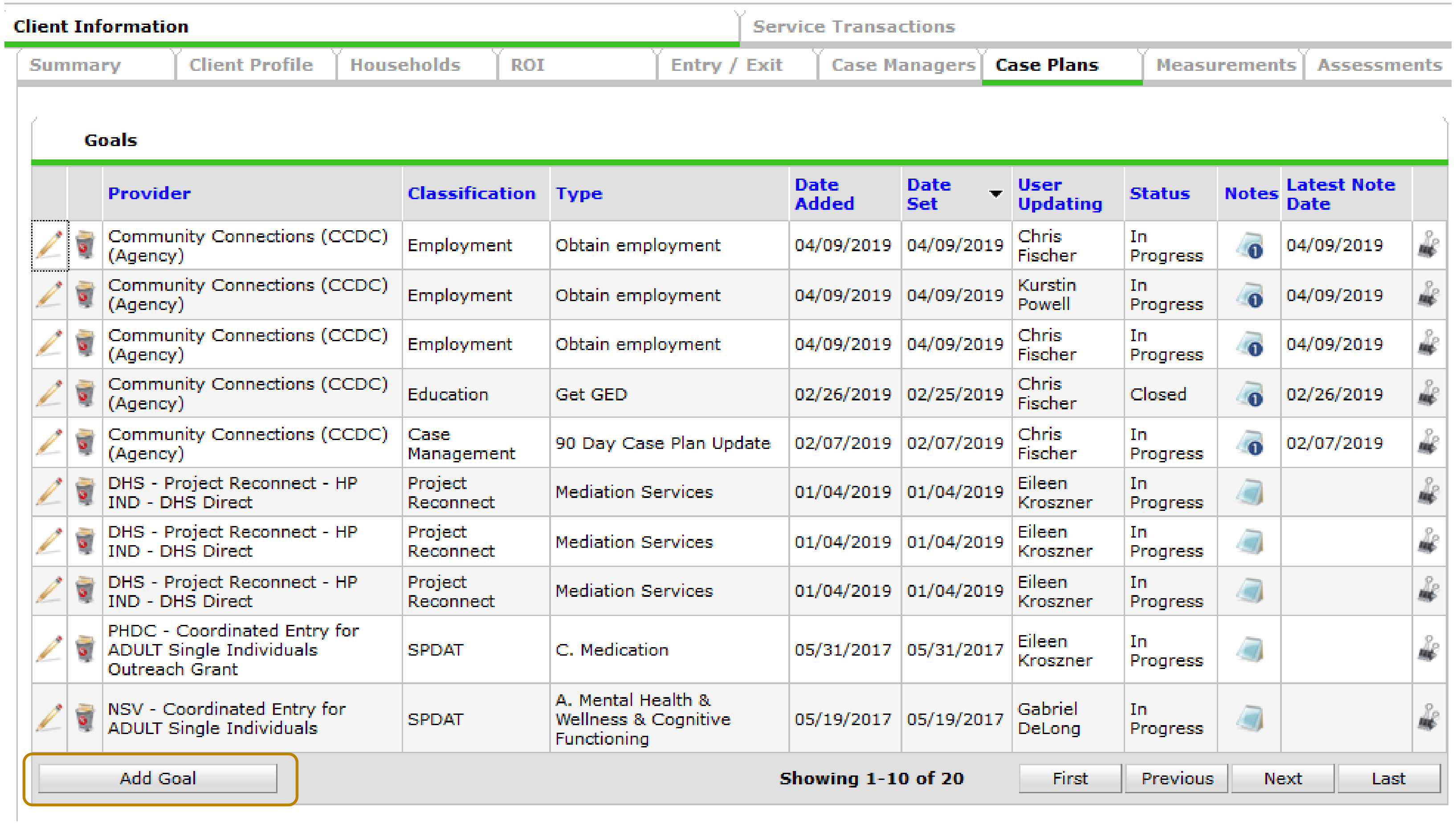
Release of Information: None

Added to the system 02/23/2001 02:45 PM

Name	Solo, Han
Date of Birth	05/02/1994 (Age 25)
Social Security	202-20-2020
Gender	Male
Primary Race	White (HUD)
Secondary Race	
U.S. Military Veteran?	Yes (HUD)

Step Two: On the Goals Screen click Add Goal:

The Community Partnership For The Prevention of Homelessness

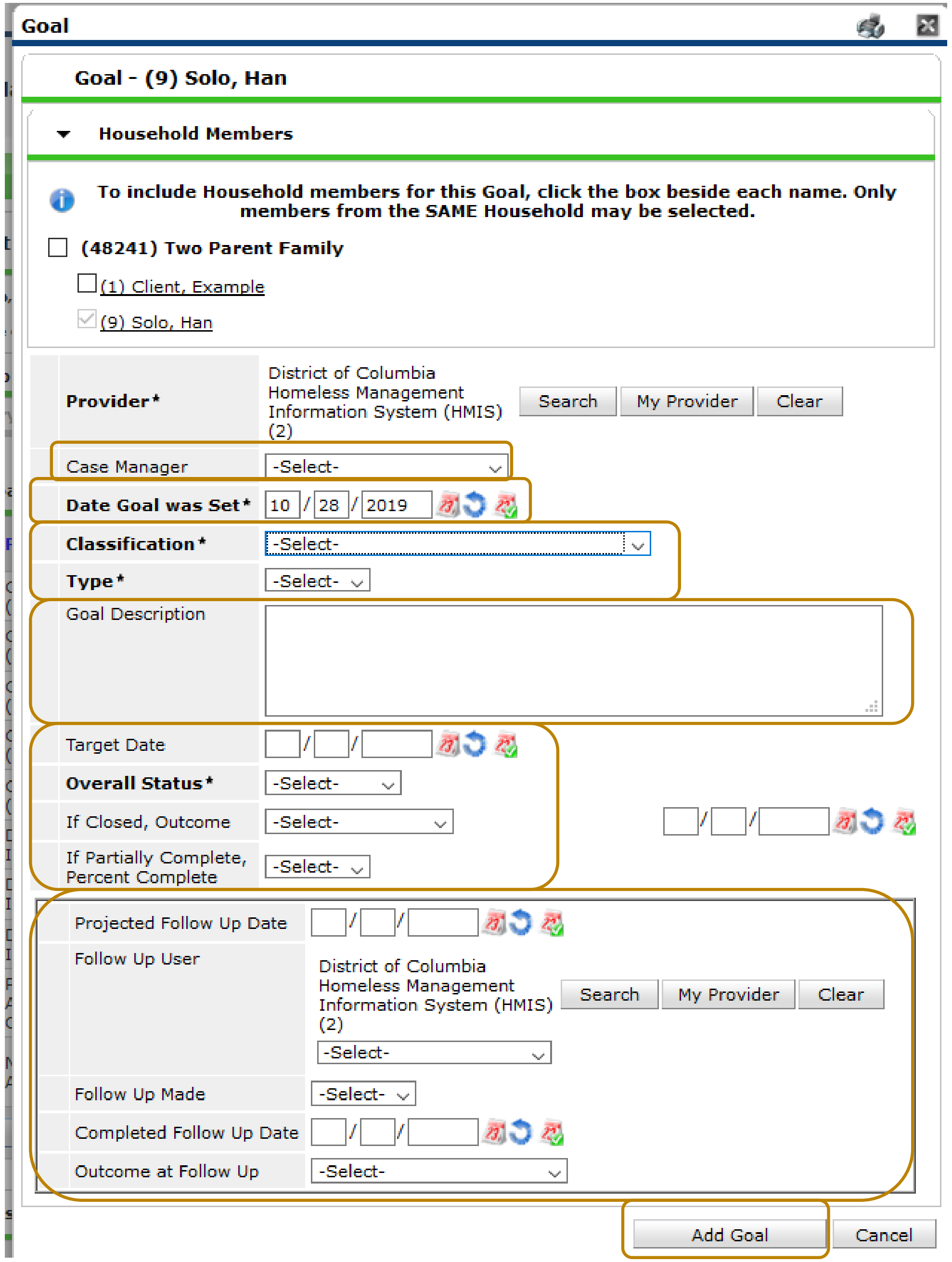


Goals

		Provider	Classification	Type	Date Added	Date Set	User Updating	Status	Notes	Latest Note Date	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Chris Fischer	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Kurstin Powell	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Chris Fischer	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Education	Get GED	02/26/2019	02/25/2019	Chris Fischer	Closed		02/26/2019	
		Community Connections (CCDC) (Agency)	Case Management	90 Day Case Plan Update	02/07/2019	02/07/2019	Chris Fischer	In Progress		02/07/2019	
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		PHDC - Coordinated Entry for ADULT Single Individuals Outreach Grant	SPDAT	C. Medication	05/31/2017	05/31/2017	Eileen Kroszner	In Progress			
		NSV - Coordinated Entry for ADULT Single Individuals	SPDAT	A. Mental Health & Wellness & Cognitive Functioning	05/19/2017	05/19/2017	Gabriel DeLong	In Progress			

Complete all the fields in the Goal Pop-up box.

Once complete, click “Add Goal”



Goal

Goal - (9) Solo, Han

Household Members

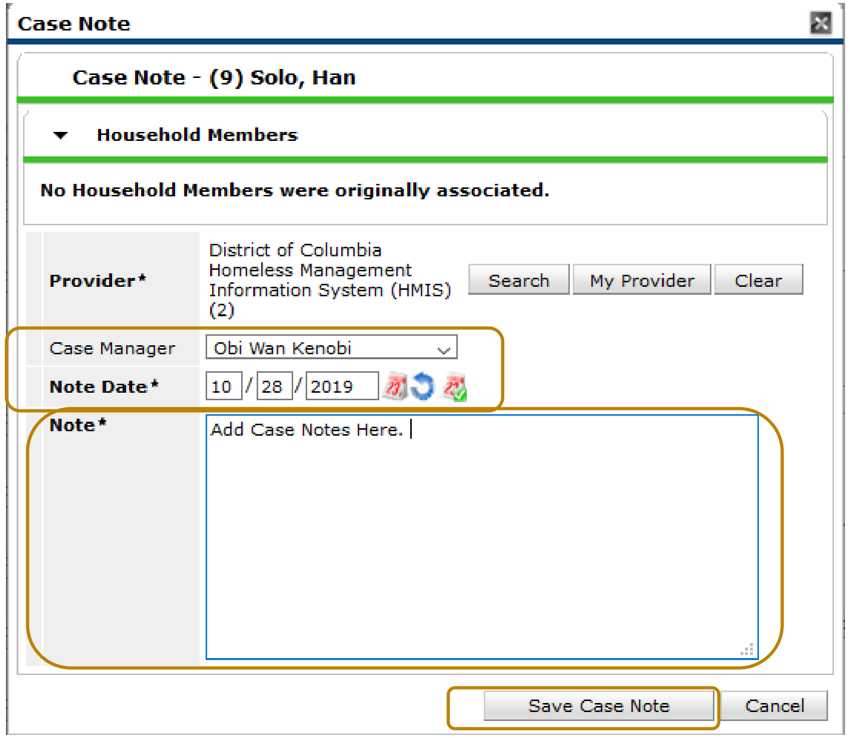
To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

☐ **(48241) Two Parent Family**
  ☐ (1) Client, Example
  ☑ (9) Solo, Han

Provider*	District of Columbia Homeless Management Information System (HMIS) (2)	Search · My Provider · Clear
Case Manager	-Select-	
Date Goal was Set*	10 / 28 / 2019	
Classification*	-Select-	
Type*	-Select-	
Goal Description		
Target Date	/ /	
Overall Status*	-Select-	
If Closed, Outcome	-Select-	/ /
If Partially Complete, Percent Complete	-Select-	

Projected Follow Up Date	/ /	
Follow Up User	District of Columbia Homeless Management Information System (HMIS) (2) -Select-	Search · My Provider · Clear
Follow Up Made	-Select-	
Completed Follow Up Date	/ /	
Outcome at Follow Up	-Select-	

Case Notes



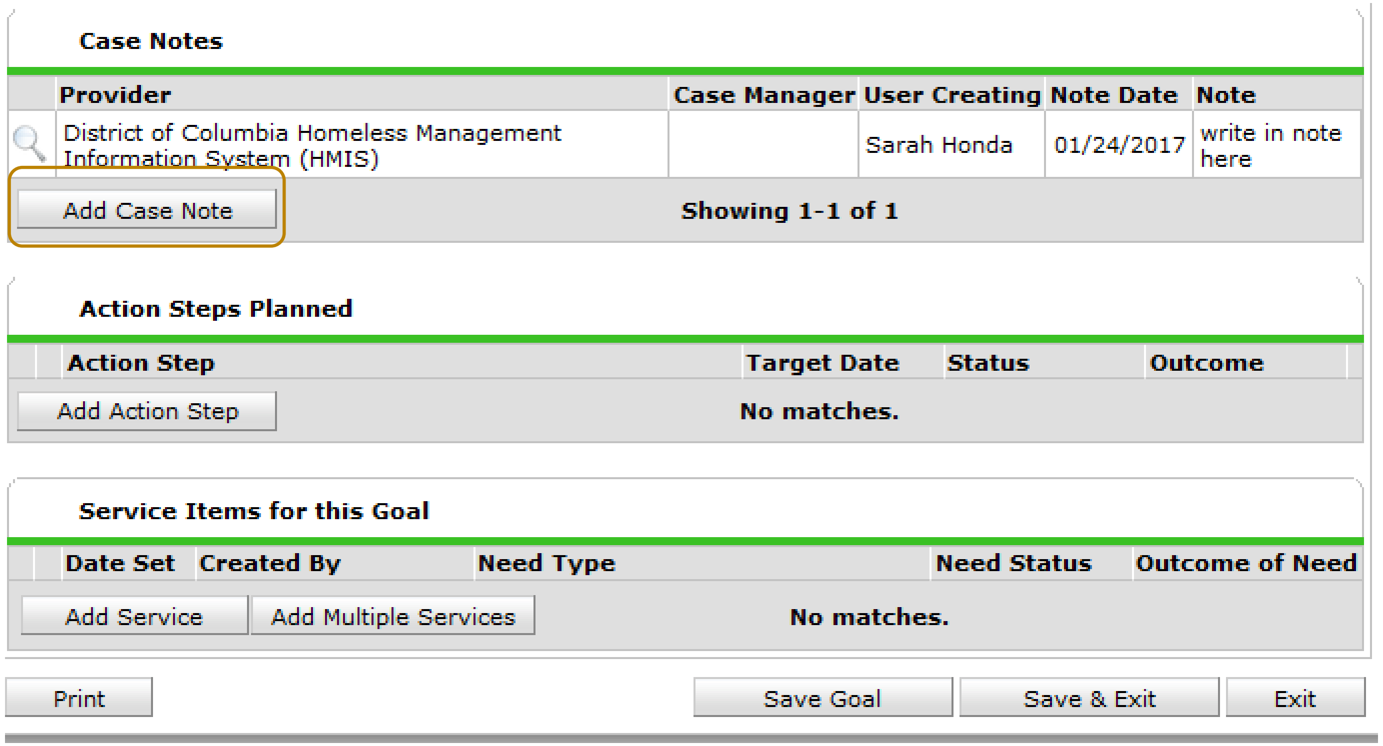
Case Note

Case Note - (9) Solo, Han

Household Members

No Household Members were originally associated.

Provider*	District of Columbia Homeless Management Information System (HMIS) (2)
Case Manager	Obi Wan Kenobi
Note Date*	10 / 28 / 2019
Note*	Add Case Notes Here.



Case Notes

Provider	Case Manager	User Creating	Note Date	Note
District of Columbia Homeless Management Information System (HMIS)		Sarah Honda	01/24/2017	write in note here

Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome

No matches.

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need

No matches.

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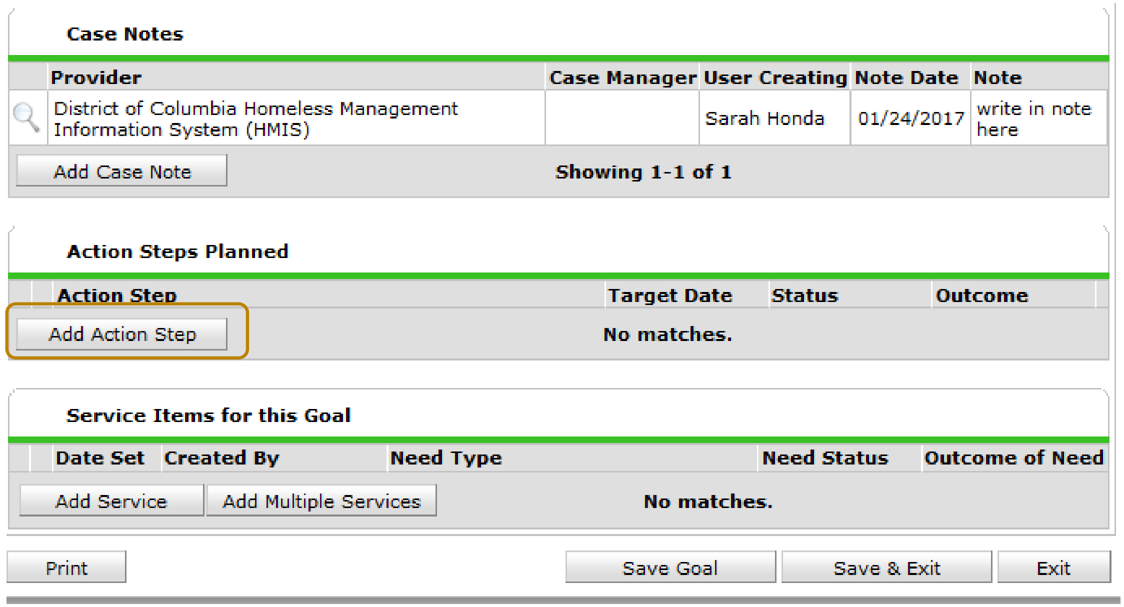
of Homelessness

Action Steps



Case Notes

	Provider	Case Manager	User Creating	Note Date	Note
	District of Columbia Homeless Management Information System (HMIS)		Sarah Honda	01/24/2017	write in note here

Showing 1-1 of 1

Action Steps Planned

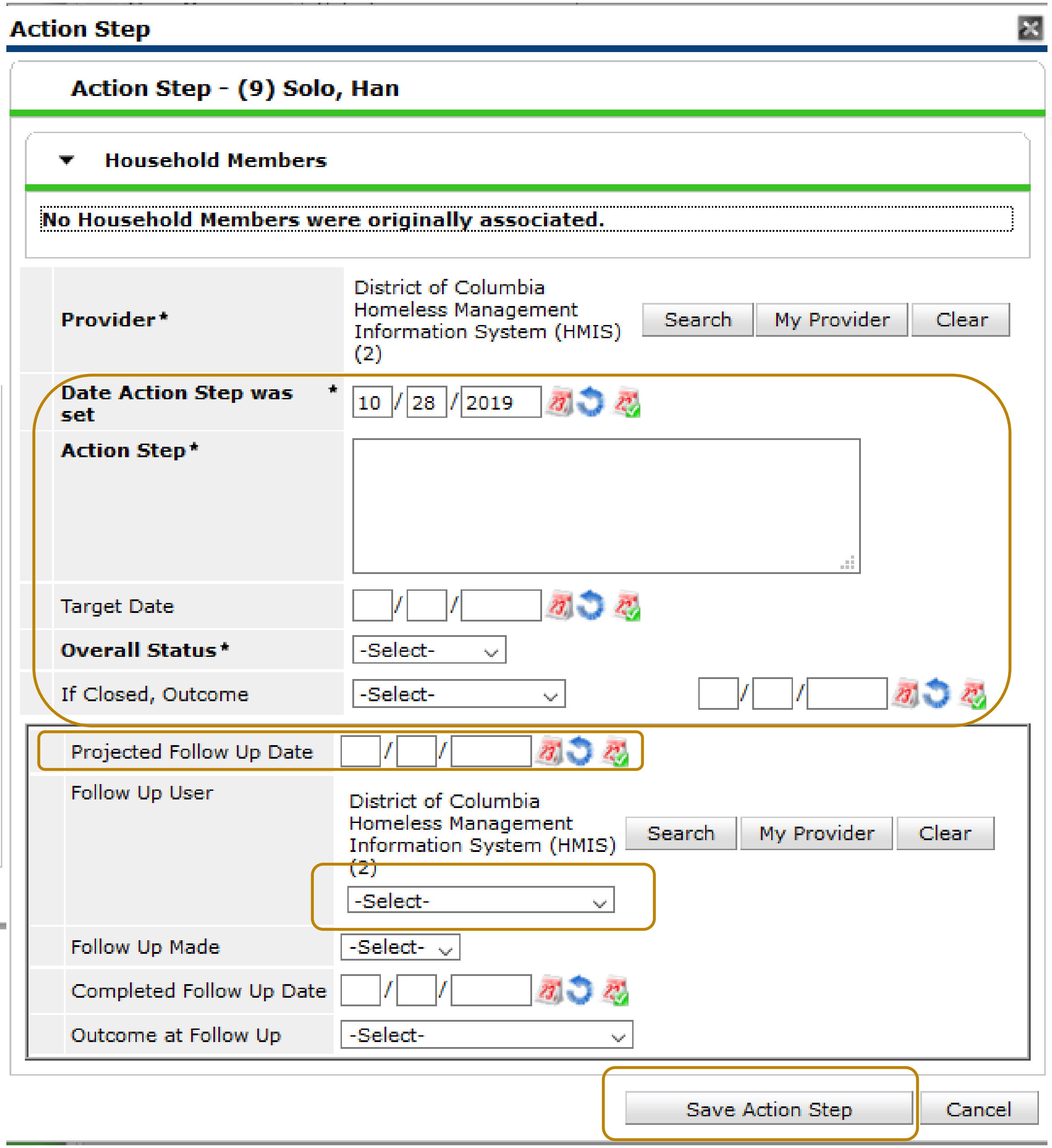
Action Step	Target Date	Status	Outcome

No matches.

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need

No matches.



Action Step

Action Step - (9) Solo, Han

Household Members

No Household Members were originally associated.

Provider*	District of Columbia Homeless Management Information System (HMIS) (2)
Date Action Step was set*	10 / 28 / 2019
Action Step*	
Target Date	/ /
Overall Status*	-Select-
If Closed, Outcome	-Select- / /
Projected Follow Up Date	/ /
Follow Up User	District of Columbia Homeless Management Information System (HMIS) (2) -Select-
Follow Up Made	-Select-
Completed Follow Up Date	/ /
Outcome at Follow Up	-Select-

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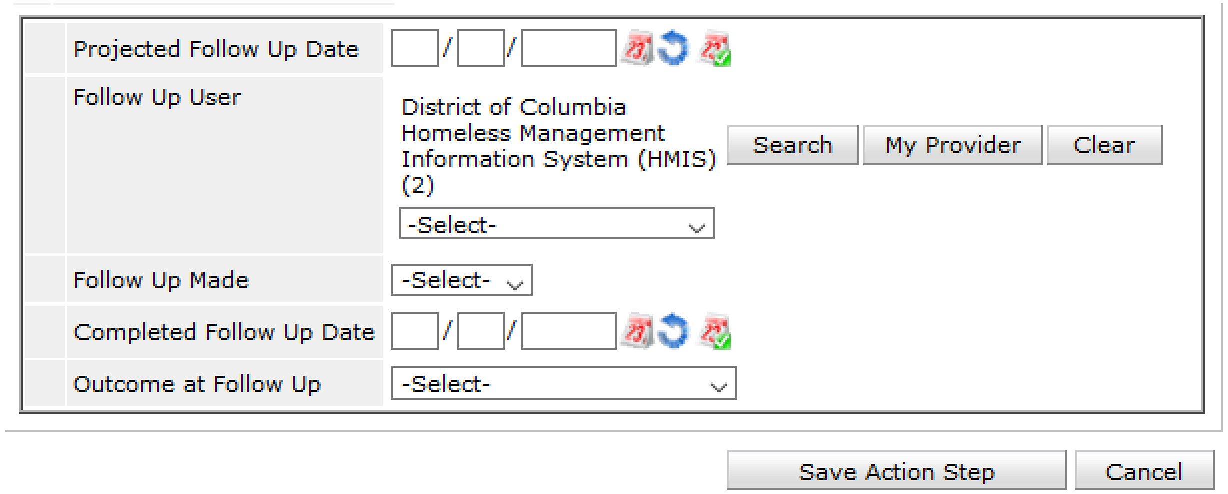
Goal Follow ups

- Goals and action steps have fields that allow case managers to indicate the date they plan to follow up with a client (**Projected Follow Up Date**), the staff person who will be following up (**Follow Up User**) the date the follow up was actually made (**Completed Follow Up Date**), and the outcome at follow up (**Outcome at Follow Up**):



Projected Follow Up Date	/ /
Follow Up User	District of Columbia Homeless Management Information System (HMIS) (2) -Select-
Follow Up Made	-Select-
Completed Follow Up Date	/ /
Outcome at Follow Up	-Select-

Updating Goals and Action Steps FAQ

What if a goal or action step requires follow up more than once?

Case managers can reset the projected follow update, completed follow up date, and outcome at follow up at each follow up.

If the client does not reach the goal by the Target Date, you can reset the target date to a new date instead of creating a new goal.

Ending a Goal

Goals and action steps have fields that allow case managers to indicate the status of a goal (**Overall Status**), and the outcome and date the goal was closed out (**If Closed, Outcome and Date Field**):

Overall Status * Closed

If Closed, Outcome Achieved 10 / 28 / 2019

Please note: Action Steps are the action items a client needs to accomplish in order to achieve a larger goal, so all Action Steps should be closed out on or before the date the goal they support is closed.


End
Demo

Part 3: Household/ client leaves your Program

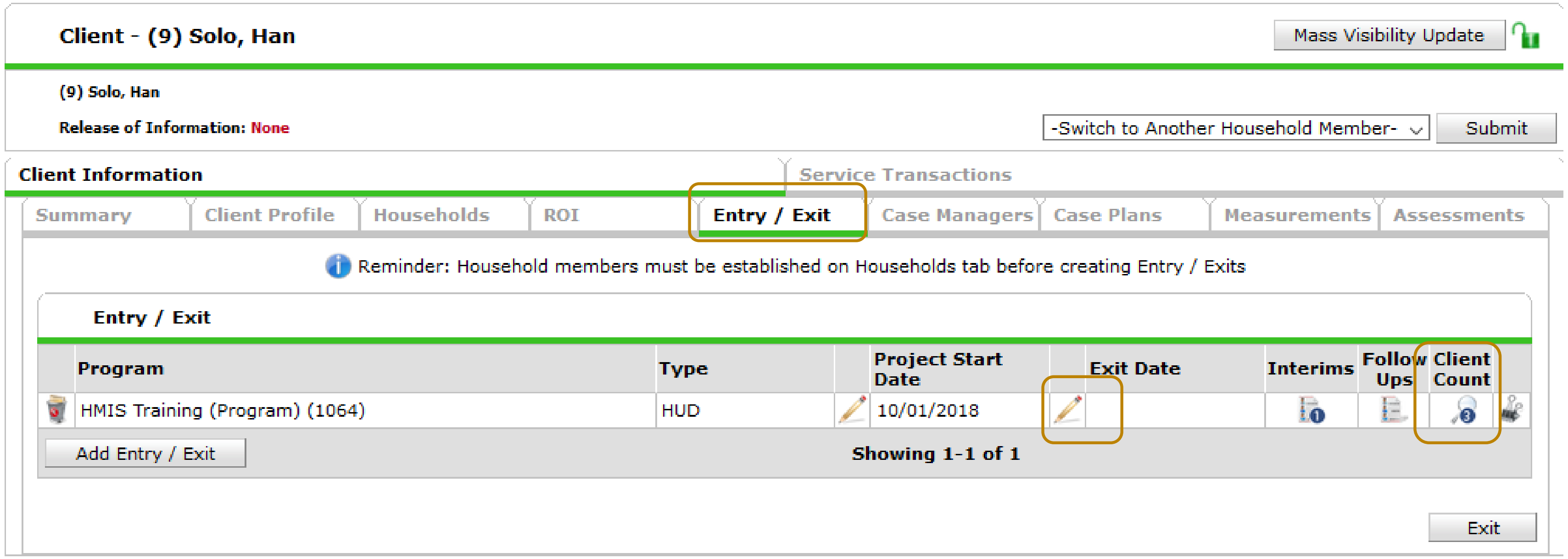
Part 1: Exiting a single client

- Sometimes, clients leave your program before the entire household leaves. You will need to create an exit for this client that is separate from the other members of the household.
- Navigate to the exiting client’s ClientPoint record.

Exiting a single client

Find the correct entry/exit – the client count is a way to make sure it is the entry you are looking for as well as the Provider name and the Project Start Date.

Click on the Edit Pencil for the Exit Date.



Client - (9) Solo, Han

(9) Solo, Han

Release of Information: None

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
HMIS Training (Program) (1064)	HUD	10/01/2018				

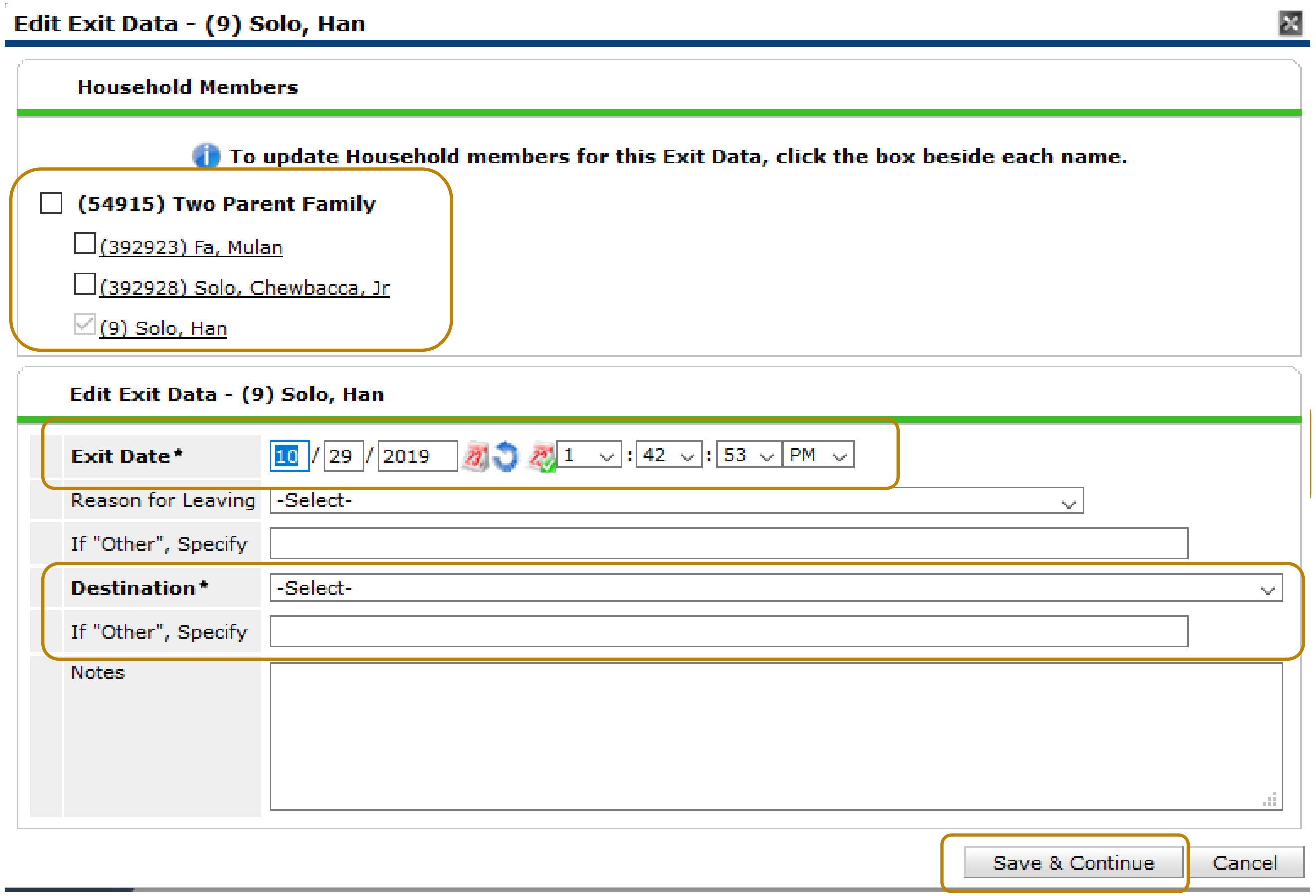
Showing 1-1 of 1

Exiting a single client

Make sure the correct client is selected.

Set the exit date to the date the client left your program and the time to the standard 12:01:00 A.M.

Set the exit Destination. The destinations with “(VW)” next to them are specific to Virginia Williams.



Edit Exit Data - (9) Solo, Han

Household Members

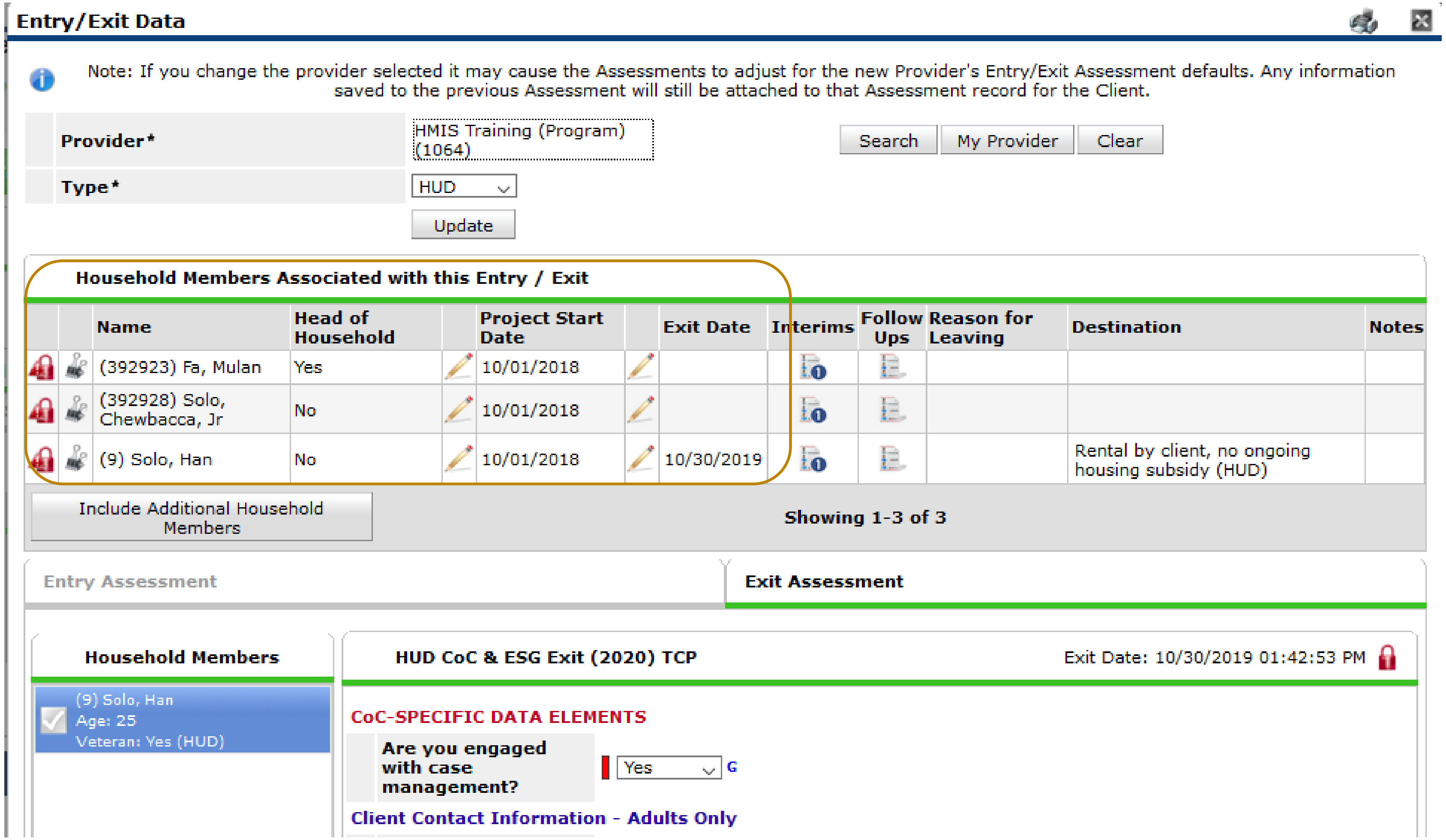
To update Household members for this Exit Data, click the box beside each name.

☐ **(54915) Two Parent Family**
- ☐ (392923) Fa, Mulan
- ☐ (392928) Solo, Chewbacca, Jr
- ☑ (9) Solo, Han

Edit Exit Data - (9) Solo, Han

Exit Date*	10 / 29 / 2019 1 : 42 : 53 PM
Reason for Leaving	-Select-
If "Other", Specify	
Destination*	-Select-
If "Other", Specify	
Notes	

- On the Entry/Exit Data pop-up you will now see that one client is exited while the other two household members are still in the program.
- The Exit Assessment is similar to the Update and Annual Assessment in that you can update the same fields if anything changes the day the client leaves your program
- Depending on your program’s funding source, you may have additional questions that only appear at Exit.
- Be careful to read the assessment carefully to ensure you are answering all questions.



Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* HMIS Training (Program) (1064)

Type* HUD

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(392923) Fa, Mulan	Yes	10/01/2018						
(392928) Solo, Chewbacca, Jr	No	10/01/2018						
(9) Solo, Han	No	10/01/2018	10/30/2019				Rental by client, no ongoing housing subsidy (HUD)	

Showing 1-3 of 3

Household Members

(9) Solo, Han
Age: 25
Veteran: Yes (HUD)

HUD CoC & ESG Exit (2020) TCP

Exit Date: 10/30/2019 01:42:53 PM

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management? Yes

Client Contact Information - Adults Only

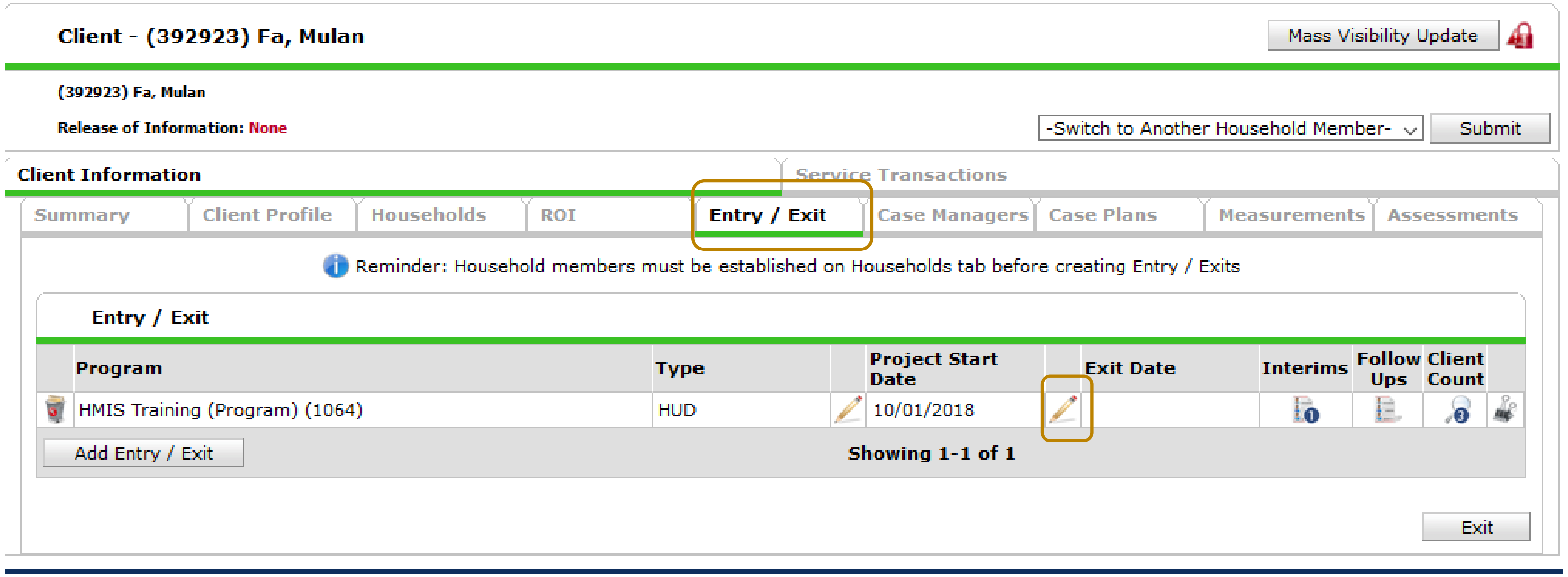

End
Demo

Part 3: Household/ client leaves your Program

Part 2: Exiting a Household

The Community Partnership For The Prevention of Homelessness

- When the household exits your program, you will need to create an exit for all household members.
- Navigate to the Head of Household's client record in ClientPoint and then go to the Entry/Exit Tab.



Client - (392923) Fa, Mulan

(392923) Fa, Mulan

Release of Information: None

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
HMIS Training (Program) (1064)	HUD	10/01/2018				

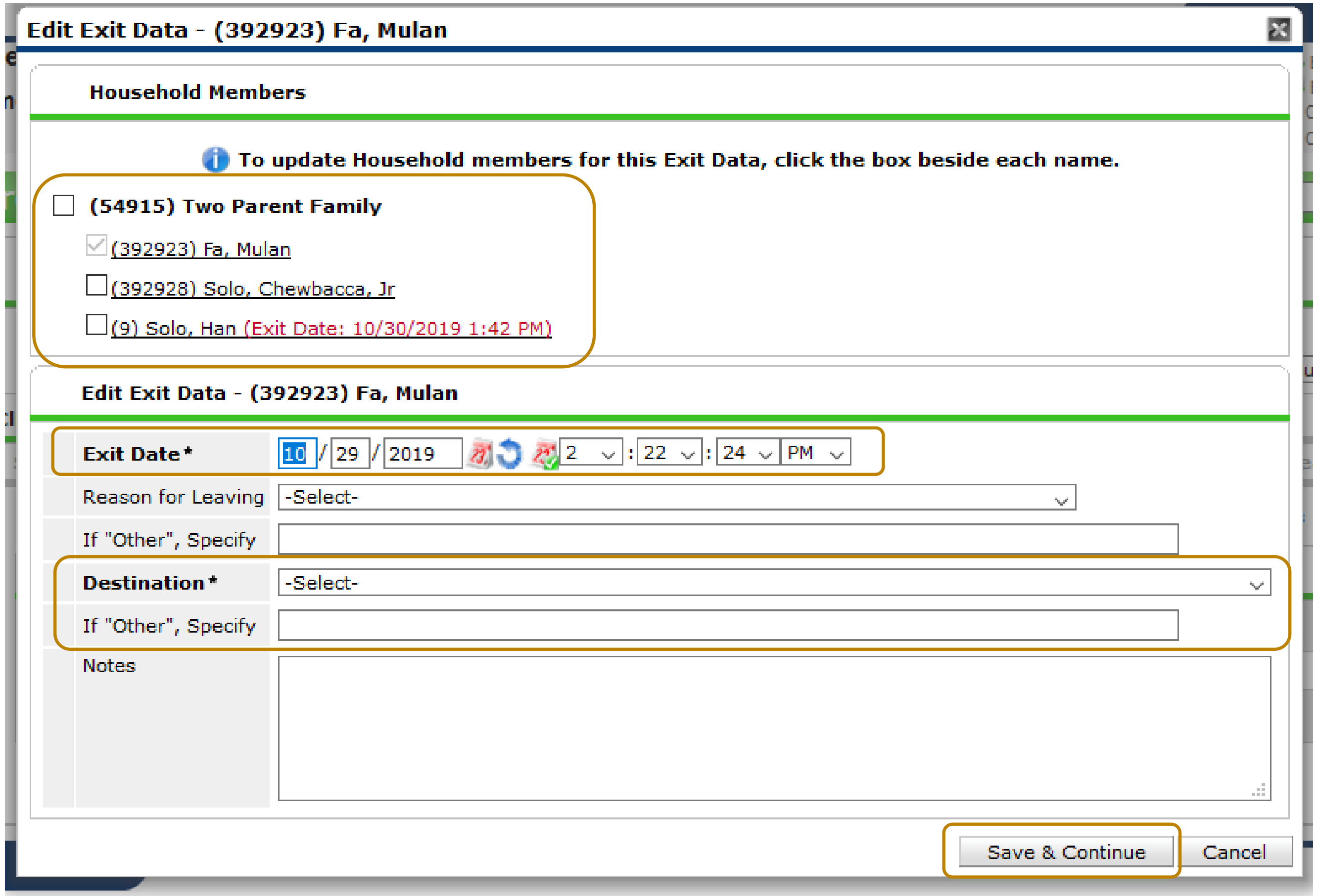
Showing 1-1 of 1

Exiting a Household

Make sure the correct clients are selected. In this household, one of the clients was exited earlier. Select the other clients in the household.

Set the exit date to the date the client left your program and the time to the standard 12:01:00 A.M.

Set the exit Destination. The destinations with “(VW)” next to them are specific to Virginia Williams.



Edit Exit Data - (392923) Fa, Mulan

Household Members

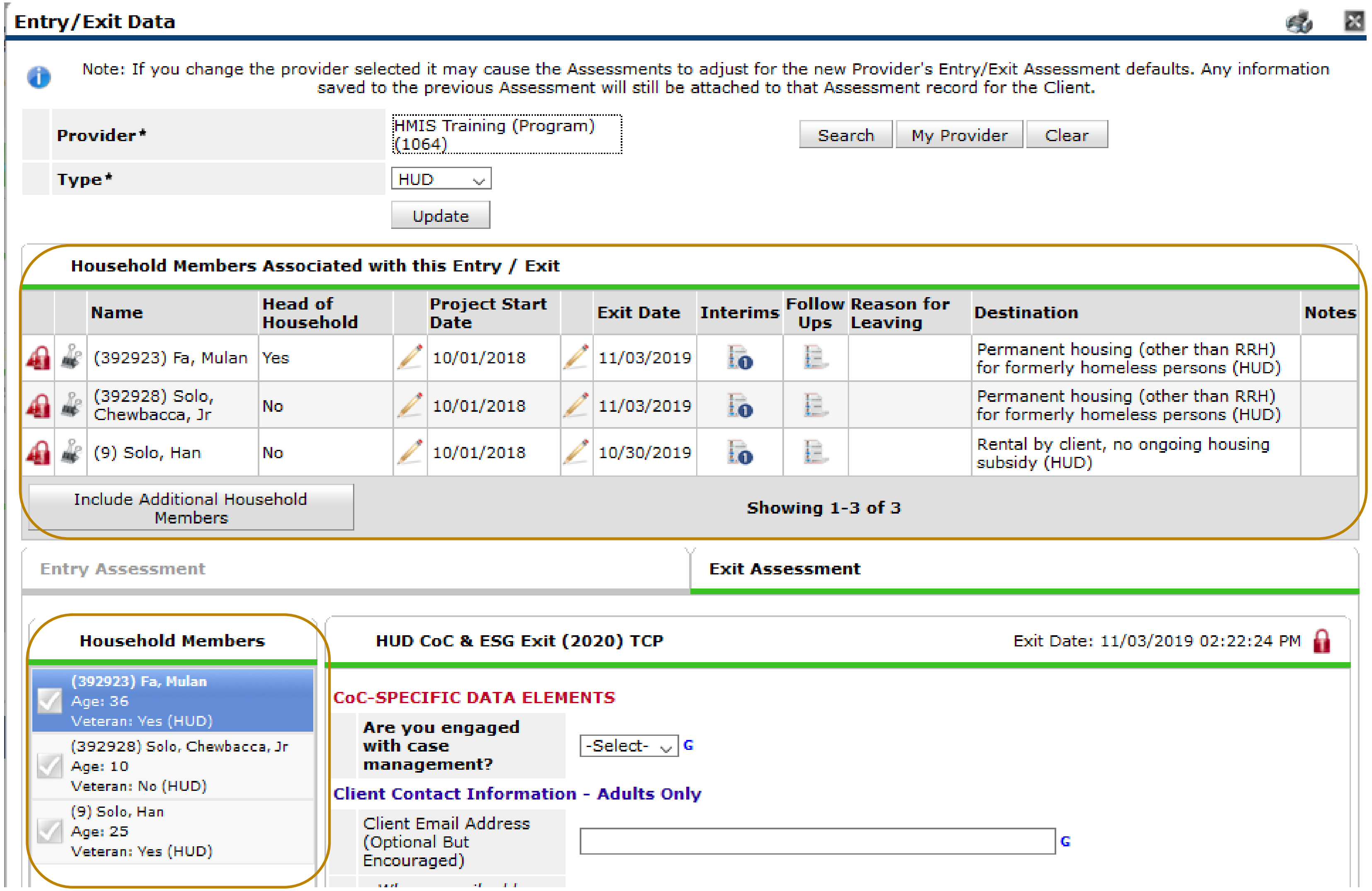
To update Household members for this Exit Data, click the box beside each name.

☐ (54915) Two Parent Family
- ☑ (392923) Fa, Mulan
- ☐ (392928) Solo, Chewbacca, Jr
- ☐ (9) Solo, Han (Exit Date: 10/30/2019 1:42 PM)

Edit Exit Data - (392923) Fa, Mulan

Exit Date*	10 / 29 / 2019 2 : 22 : 24 PM
Reason for Leaving	-Select-
If "Other", Specify	
Destination*	-Select-
If "Other", Specify	
Notes	

- On the Entry/Exit Data pop-up you will now see that all clients are exited with two different exit dates because the different household members exited on different dates.
- The Exit Assessment is similar to the Update and Annual Assessment in that you can update the same fields if anything changes the day the client leaves your program
- Depending on your program's funding source, you may have additional questions that only appear at Exit.
- Be careful to read the assessment carefully to ensure you are answering all questions.



Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider*: HMIS Training (Program) (1064)

Type*: HUD

Household Members Associated with this Entry / Exit

		Name	Head of Household		Project Start Date		Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
		(392923) Fa, Mulan	Yes		10/01/2018		11/03/2019				Permanent housing (other than RRH) for formerly homeless persons (HUD)	
		(392928) Solo, Chewbacca, Jr	No		10/01/2018		11/03/2019				Permanent housing (other than RRH) for formerly homeless persons (HUD)	
		(9) Solo, Han	No		10/01/2018		10/30/2019				Rental by client, no ongoing housing subsidy (HUD)	

Showing 1-3 of 3

Household Members

☑ (392923) Fa, Mulan
Age: 36
Veteran: Yes (HUD)

☑ (392928) Solo, Chewbacca, Jr
Age: 10
Veteran: No (HUD)

☑ (9) Solo, Han
Age: 25
Veteran: Yes (HUD)

HUD CoC & ESG Exit (2020) TCP

Exit Date: 11/03/2019 02:22:24 PM

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management? -Select-

Client Contact Information - Adults Only

Client Email Address (Optional But Encouraged)

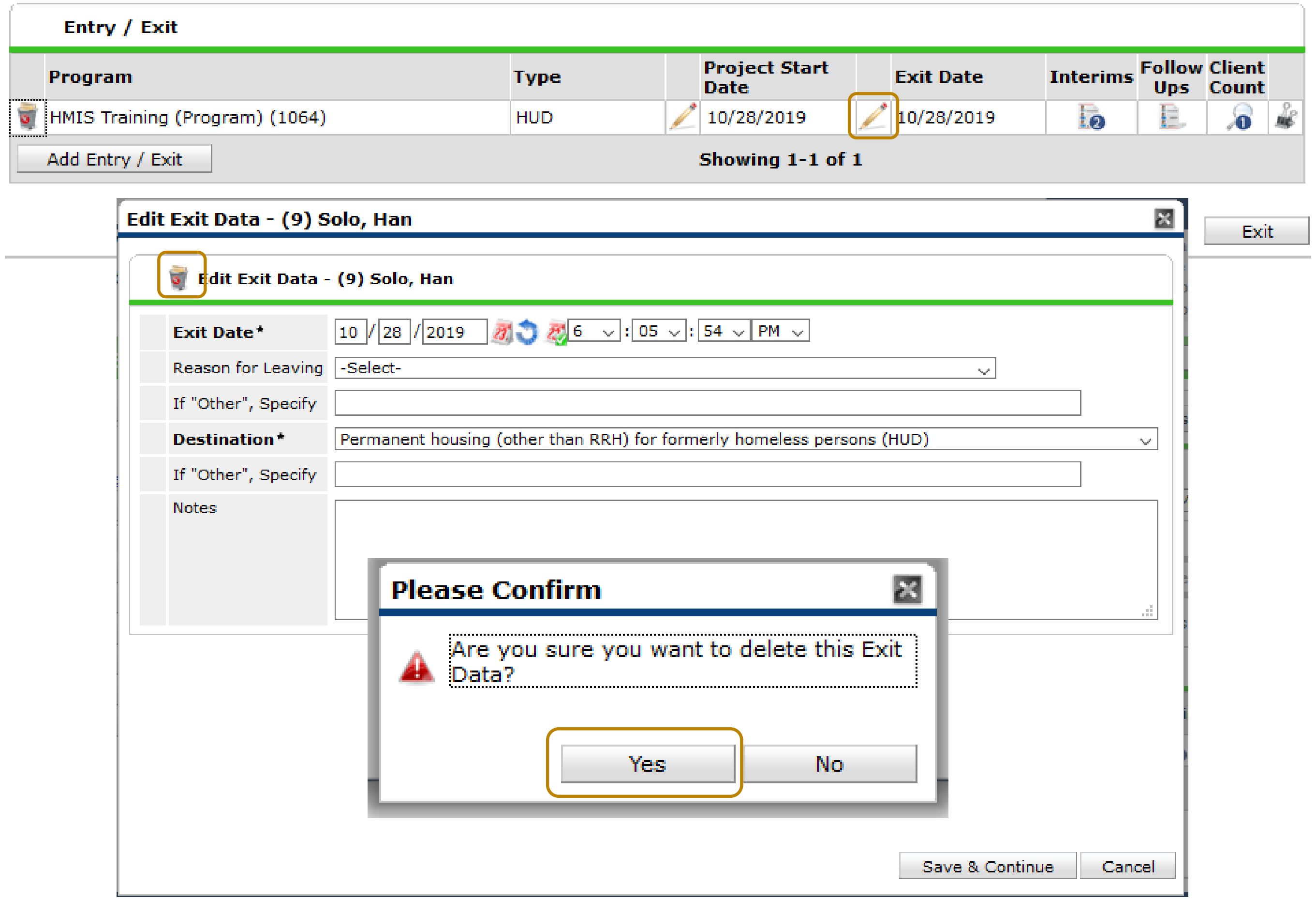

End
Demo

Common Data Entry Errors

- Exiting a client by mistake
- Creating an Update instead of an Annual Assessment

Exiting a Client by Mistake

- Sometimes we exit a client when we did not mean to.
- This can be fixed by deleting the exit. First we must click the Exit Edit Pencil.
- Then we click the Trash can in the Edit Exit Data pop-up.
- Click "Yes" to confirm and delete the exit.
- This step needs to happen for each client in the household if multiple clients need to have their exit deleted.



Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HMIS Training (Program) (1064)	HUD	10/28/2019	10/28/2019			

Edit Exit Data - (9) Solo, Han

Edit Exit Data - (9) Solo, Han

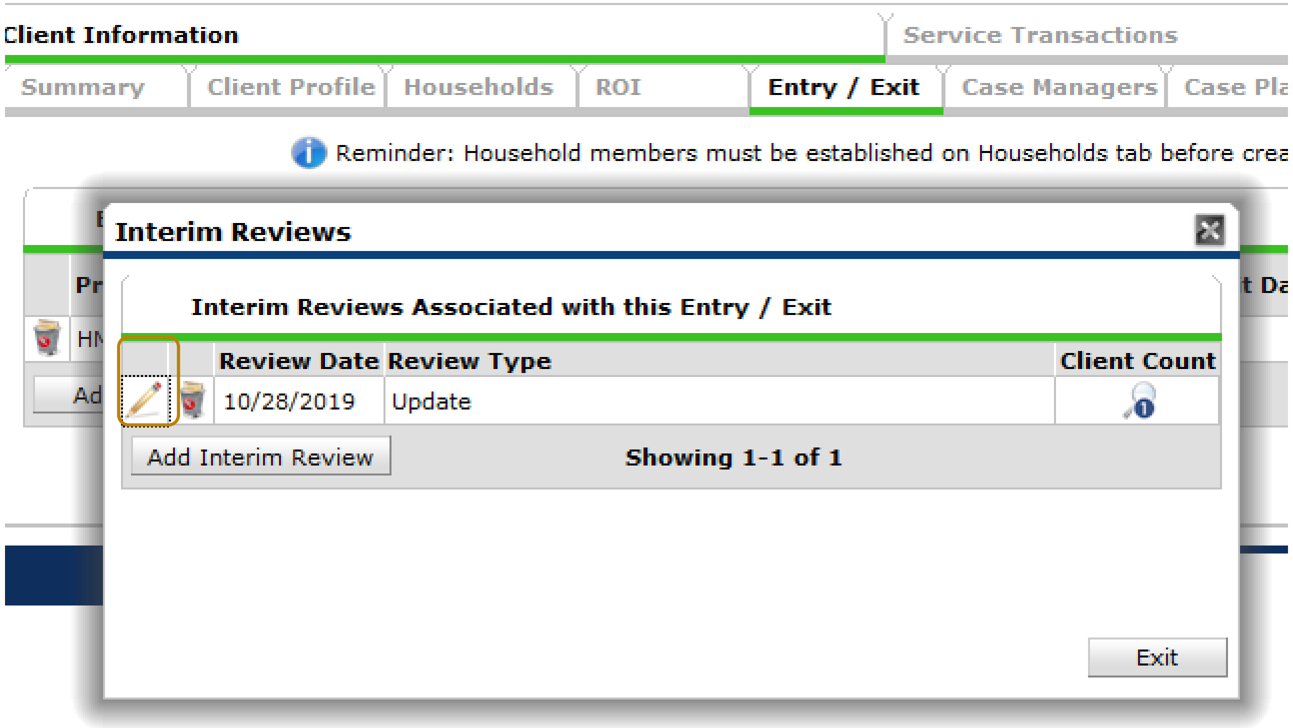
Exit Date*	10 / 28 / 2019 6 : 05 : 54 PM
Reason for Leaving	-Select-
If "Other", Specify	
Destination*	Permanent housing (other than RRH) for formerly homeless persons (HUD)
If "Other", Specify	
Notes	

Please Confirm

Are you sure you want to delete this Exit Data?

Creating an Update instead of an Annual Assessment

- Sometimes we choose the wrong type of Interim Review.
- Here I meant to enter an Annual Review but made an Update instead.
- This can be fixed by updating the Interim Review Type.
- Click the Edit Pencil for the Update.



Reminder: Household members must be established on Households tab before crea

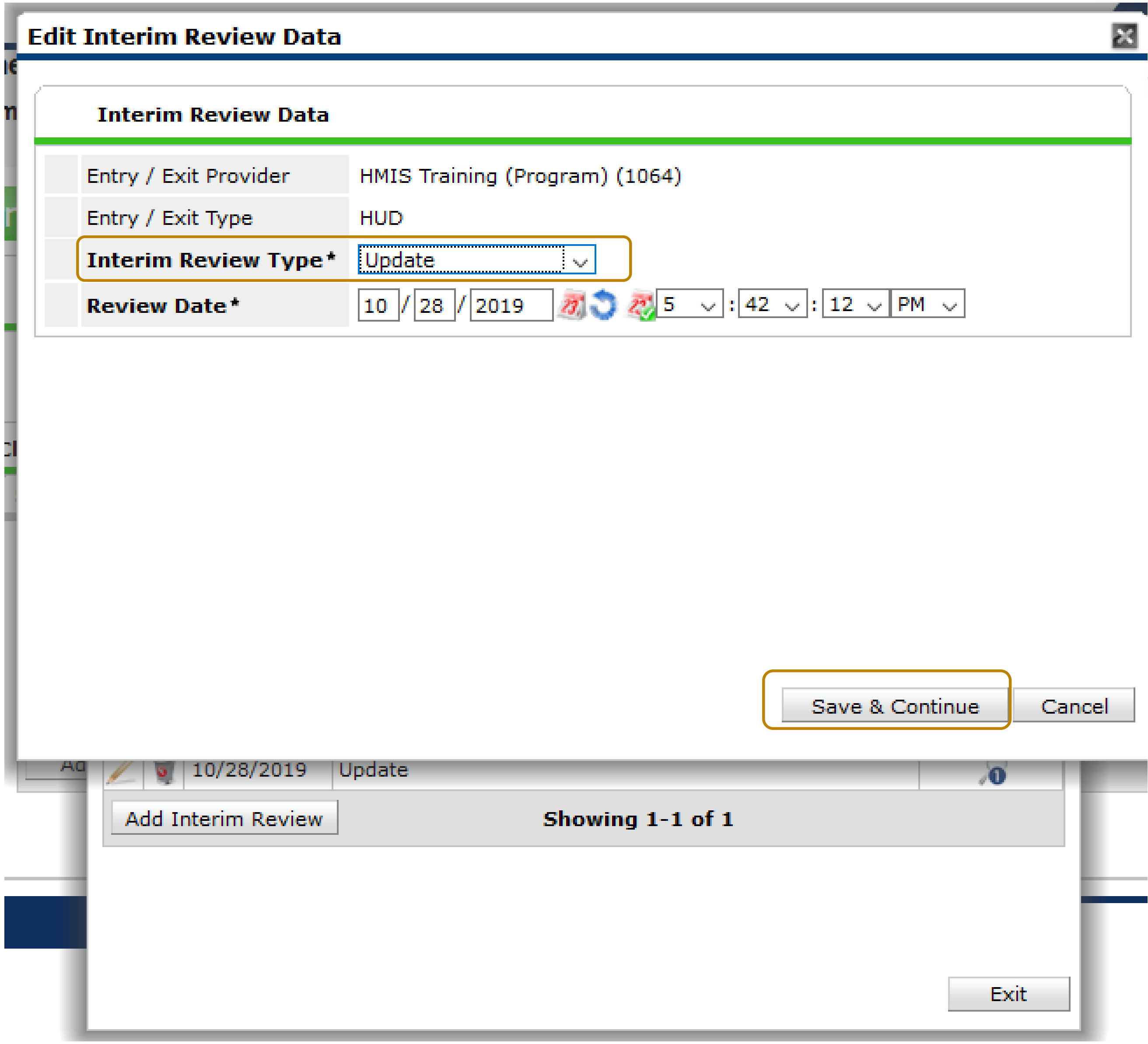
Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
10/28/2019	Update	

Showing 1-1 of 1

- Change the Interim Review Type to Annual Assessment
- Click Save & Continue.
- If you have already made all your updates to the Assessment, click Save & Exit.



Edit Interim Review Data

Interim Review Data

Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type*	Update
Review Date*	10 / 28 / 2019 5 : 42 : 12 PM

HMIS Policy Updates

Data Sharing

Updated language around what is shared automatically within the system and what requires a Release of Information.

Stage 2 of these updates includes a Universal ROI, in process of being drafted.

Training

Added: Timely log in

Added: Successful completion of training

Added: Annual Security Training Requirement

Added: Recertification Training

Added: HMIS Training as Remedial Training

Timely Login

- Once a user has completed HMIS Training, they must submit their signed User Agreement and log into HMIS within 60 days of training completion. Failure to do so will result in a user needing to complete HMIS training, or a test of the data entry trained upon in the HMIS Training, and resubmission of their User Agreement before gaining access to the DC HMIS.
- User Accounts will also be monitored for regular login. The Lead Agency has the right to remove a user's account if the user does not log in in six (6) months. The user will need to complete a data test or complete HMIS training to regain access to the DC HMIS.

Successful Completion of Training

- Lead Agency Staff may determine that a new user has failed to grasp the necessary data entry concepts during training.
- Lead Agency staff may use their discretion to require new users to repeat HMIS Training. If a new user fails to successfully complete HMIS Training after repeated attempts, Lead Agency staff may use their discretion to determine that the new user is not capable of accurate and complete data entry and may refuse to issue the new user a DC HMIS user license.
- The Lead Agency will work with the user's Agency Administrator to determine next steps needed for the user to be able to gain access to the system, including but not limited to computer training.

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Annual Security Training

- All users are required to attend annual security training provided by the Lead Agency to retain their user license.
- This is a HUD requirement
- Had the training last year in November; this year the EDA training covers the Security Training
- Keeping it in line with HUD Data Standards changes (September/October)

Recertification Training

- At the discretion of the Lead Agency, users may be required to complete a recertification training in the event of significant changes to data collection requirements, data entry workflow, or HMIS policies and procedures. Users who do not complete recertification training in a timely fashion may have their licenses suspended until training has been completed.
- EXAMPLE – this EDA Training

HMIS Training as Remedial Training

- If the Lead Agency or Agency Administrator determines that data entered by a current user does not meet minimum data quality standards, or if a user has not accessed the system within three (3) months of completing HMIS Training, users may be required to repeat the training.
- This allows you to tap users for repeat training, or if TCP notices issues for us to tap users for training.

User Violations

HMIS users and Partner Agencies must abide by all HMIS policies and procedures found in the HMIS Policies and/Procedures manuals, the User Agreement, and the Agency Agreement. Repercussions for any violation will be assessed in a tiered manner. Each user or Partner Agency violation will face successive consequences – the violations do not need to be of the same type in order to be considered second or third violations. User violations do not expire. No regard is given to the duration of time that occurs between successive violations of the HMIS policies and procedures as it relates to corrective action.

First Violation

- **First Violation –** The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The user's license will be suspended for 30 days, or until the Partner Agency notifies the Lead Agency of action taken to remedy the violation. The Lead Agency will provide necessary training to the user and/or the Partner Agency to ensure the violation does not continue.

30-day Suspension

Possibility of Shortened Suspension

Training

Second Violation

30-day suspension

No Shortening of Suspension

training requirement

- **Second Violation –** The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The user's license will be suspended for 30 days. The user and/or the Partner Agency must take action to remedy the violation; however, this action will not shorten the length of the license suspension. If the violation has not been remedied by the end of the 30-day user license suspension, the suspension will continue until the Partner Agency notifies the Lead Agency of the action taken to remedy the violation. The Lead Agency will provide necessary training to the user and/or the Partner Agency to ensure the violation does not continue.

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Third Violation

Review Panel Formed

Minimum 30-day suspension

Potential Revocation of License

- **Third Violation** – The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The Lead Agency will convene a review panel made up of Lead Agency Staff who will determine if the user's license should be terminated. The user's license will be suspended for a minimum of 30 days, or until Lead Agency review panel makes their determination, whichever occurs later. If the Lead Agency review panel determines the user should retain their user license, the Lead Agency will provide necessary training to the user and/or Partner Agency to ensure the violation does not continue. If users who retain their license after their third violation have an additional violation, that violation will be reviewed by the Lead Agency review panel.

Additional Information

- It is the responsibility of each Agency Administrator and user to notify the HMIS Lead Agency **within 24 hours** of when they suspect that a User or Partner Agency has violated any HMIS operational agreement, policy, or procedure.
- A complaint about a potential violation must include the User and Partner Agency name a description of the violation, including the date or timeframe of the suspected violation.
- Complaints should be sent in writing to the HMIS Lead Agency at
  The name of the person making the complaint will not be released from the HMIS Lead Agency if the individual wishes to remain anonymous.
- Any Partner Agency or user violation of local, district, or federal law will immediately be subject to the consequences listed under the Third Violation above.
- All violations will be assessed by the Lead Agency and depending on their severity may be subject to the consequences listed under the Third Violation above as determined by the Lead Agency.
- During a 12-month calendar year, if there are multiple users (three or more) with multiple violations (2 or more) from one Partner Agency, the Partner Agency as a whole will be subject to the consequences listed under the Third Violation above.

Updated User Agreement

- The HMIS User Agreement has been updated and digitized.

- *All users must report any potential conflict of interest to their Agency Administrator. Users who are also clients with files in the HMIS are prohibited from entering or editing information in their own file. All users are also prohibited from entering or editing information in files of immediate family members. The Lead Agency may run an HMIS user audit trail report to determine if there has been a violation or suspected violation of the conflict of interest agreement. *

- **ALL users must sign a new HMIS User Agreement by 10/1/2020**

Additional Resources

- Helpdesk: hmis@community-partnership.org
  - Email the helpdesk with questions and we will provide answers and resources.
  - We respond within 2 business days.

- Trainings:
  - We hold HMIS trainings every month.
  - They are open to all, new user, seasoned veteran, or anywhere in between
  - Training eventbrites are found at http://community-partnership.org/providers/training
  - Have questions about the trainings? Email the helpdesk!

Thanks for participating!

Questions?

HMIS Help-Desk Email: hmis@community-partnership.org