

HMIS Training

DC 103: YOUTH ENTRY EXIT WORKFLOW



Agenda

- •HMIS Basics Recap
- Introduction to ClientPoint
- •The Entry/Exit Workflow
- •What does entry mean for my project type?
- •Creating a new client
- Completing Client Profile information
- •Creating an entry
- •Entry Assessment

- •Updates and Annual Assessments
- •Exiting a client
- Common Data Entry Errors
- Additional Resources

HMIS Basics Recap



•DC's HMIS

•Visibility Basics

Data Security

What is HMIS?

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

SERVI	CEpoint®
The Cor	mmunity
Partn	ership
User Name Password	Login
	Forgot Password
System use requi	res your compliance
with the term	s and conditions
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All Rights	s Reserved

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.



The Community Partners For The Prevention of Homelessness



Visibility Basics – Current Structure





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



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 <u>YOU!</u>

- •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/

SERVICE point*										
The Co Part	ommunity nership									
User Name Password	Login									
System use req	Forgot Password									
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Live site: https://washdc.servicept.com



Logging In

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

Forgot your password?





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...





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.



Why use Enter Data As?

- Allows for you to see what is shared with individual programs.
- •Allows others to see data from your shelter/prevention/outreach program
- You no longer have to manually change your provider in your
 - Entry/exits
 - Goals
 - Case plans
 - Case notes
 - Case managers
 - Services
 - File attachments



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





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• 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



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

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• 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).



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 Par District of Columbia Ho October 24, 2019	tnership omeless Ma	nagement	Information System (Mode: & Entr Bac HMIS) © Conr	er Data As k Date nect To ART nect To Qlik	
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ClientPoint	Date	Headlin	e	Client ID Type	Date	Time Remaining
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ShelterPoint						
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Reports						
Admin						
Logout						
			View All			View All

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.

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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



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. Middle Suffix First Last Name 1 3 2 Name Data Quality -Select-Date of Birth \sim Alias DOB Data Quality -Select- \sim Social Security -Select-Gender \sim Number Social Security -Select-Primary Race -Select- \sim \sim Number Data Quality U.S. Military -Select--Select-Secondary Race \sim \sim Veteran? Ethnicity -Select-Exact Match \sim Add New Client With This Information Clear Search **Client Number** Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Submit

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 Sys Items in Italics are for Data Entry C	stem before adding a New Client. ONLY and will not be used for Search Results.
Name	First Middle Last	t Suffix
Name Data Quality	Full Name Reported 🗸	Date of Birth 11 / 03 / 1983 20 20
Alias		DOB Data Quality Full DOB Reported (HUD)
Social Security Number	845 - 54 - 6321	Gender Female v
Social Security Number Data Quali	y Full SSN Reported (HUD)	Primary Race Asian (HUD)
U.S. Military Veteran?	Yes (HUD) 🗸	Secondary Race -Select-
Exact Match		Ethnicity Non-Hispanic/Non-Latino (HUD) V
Search Cl	ear Add New Client With This Information	
Client Number		

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

Client ID #

Submit

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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Release of I	nformation: No	ne			-Swi	tch to Another H	ousehold Member-	- v Subr
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Ethnicity		Non-Hispanic/Non-	Latino (HUD)					
						Con		in Easter



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"

Clie	nt Information					Service Transactions							
Su	mmary Clie	ent Profile	Households	ROI	Entry / I	Exit	Case Managers	Case Plans	Measurement	Assessments			
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	U.S. Military Veteran?	Yes	(HUD)										
	Age	35											

Client Inform	ation			۱ ا	Service Transactions								
Summary	Client Profile	Households	ROI	Entry / E	xit	Case Managers	Case Plans	Measurements	Assessments				
▶ Prev	 This Client is not currently a member of any Households. Previous Households 												
Search Exis	ting Households	Start New Hou	sehold						Exit				
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				N	
Household Type					
Household Type* -Select-	~				The Community Partnership For The Prevention
Client Search					of Homelessness
() P	lease Search the System bef	ore adding a New Client.	Hide Advanced	d Search	
Items in Italics are for Da	ata Entry ONLY and will not be	e used for Search Results.			-
Name First Middle	Fa	Suffix			
Name Data Quality	Date of J	/2			
Alias	DOB Data Quality -Select-		~		
Social Security	Gender -Select-			~	
Social Security Number Data Quality	Primary Race -Select-		~		t
U.S. Military Veteran?	Secondary Race -Select-		~		
Exact Match	Ethnicity -Select-	~			
Search Clear Add New Client With This In	nformation				
Enter or Scan a Client ID to add that Client to this Household	<u>`</u>				
Client ID # Submit					
Selected Clients					
ID Name Social Security Number	Date of Birth	Alias	Gender Banned	Household Count	
392923 Fa, Mulan 854-54-6321	11/03/1983	F	Female	0 🔍	
	Showing 1	-1 of 1			
		c	Continue	Cancel	

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.

New Househo	ld						×
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5676 solo, ha	15		01/19/1998		Other		οQ
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92923 Fa, Mula	n	854-54-6321	11/03/1983		Female		0 🔍
				Showing 1-1 of 1			
					Continue		Cancel
					Continue		Jancer

artnershi

ness

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"

lousehold Type	•				
usehold Type*	Two Parent Family	~			
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Solo, Han	202-20-20	20 05/02/1994	Scruffy Nerf Herde	r Male	1 🔍
			Showing 1-2 of 2		

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Client Number Enter or Scan a Client ID to add that Client to this Household. Client ID # Submit **Client Results** Household Count Social Security Gender Banned Date of Birth Alias ID Name Number No matches. Selected Clients Household Social Security Gender Banned Date of Birth ID Alias Name Number Count 392923 Fa, Mulan 854-54-6321 0 11/03/1983 Female 0 392928 Solo, Chewbacca, Jr Other 0 05/03/2009 \bigcirc Solo, Han 202-20-2020 05/02/1994 Scruffy Nerf Herder Male 1 9 Showing 1-3 of 3 Continue Cancel

Once the household is fully built, Click Continue. 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"

Ho	usehold In	forn	nation	- (5	4915) Two Parent Fa	amily				đ	
Ì	(54915) T	wo F	Parent	Fami	v		Save	Sa	ave & Exit	Exit	
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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.

Client Inform	nation					Se	rvice Tra	nsaction	5		
Summary	Clien	t Profile	Households	ROI	Entry	/ Exit	Case M	anagers	Case Plans	Measurements	Assessments
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ummary	Client Profile	Households	ROI	Entry	/ Exit	Case Managers	Case Plans	Measurements	Assessments	
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Entry /	Exit									
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• • •	Click "Ad Choose t Set the P Click Sav	d Entry/I he corre Project St e & Cont	Exit" ct Type art Date inue	e				□ (54915) T □ <u>(392923</u> □ <u>(392928</u> □ <u>(9) Solo</u> Project Si Provider *	wo Parent Fa) Fa, Mulan) Solo, Chewb . Han art Data - (3	92928) Solo, Chewbacca, Jr HMIS Training (Program) (1064) Search My Provider Clear
• • •	Click "Ad Choose t Set the P Click Sav	d Entry/I he corre Project St e & Cont	Exit" ct Type art Date inue	e				□ (54915) T □ (392923) □ (392923) □ (9) Solo Project Si Provider * Type *	wo Parent Fa) <u>Fa, Mulan</u>) <u>Solo, Chewb , Han</u> art Data - (3	acca, Jr 92928) Solo, Chewbacca, Jr HMIS Training (Program) (1064) RHY \u2207
•	Click "Ad Choose t Set the P Click Sav	d Entry/I he corre Project St e & Cont	Exit" ct Type art Date inue	e				□ (54915) T □ (392923) □ (392923) □ (392923) □ (9) Solo Project Si □ Provider * Type * Project St	wo Parent Fa) Fa, Mulan) Solo, Chewb . Han art Data - (3	acca, Jr 92928) Solo, Chewbacca, Jr HMIS Training (Program) (1064) RHY 11 / 08 / 2018 Ø 2018
•	Click "Ad Choose t Set the P Click Sav	d Entry/I he corre Project St e & Cont	Exit" ct Type art Date inue	e				□ (54915) T □ (392923) □ (392923) □ (9) Solo □ (9) Solo Project St □ Provider * □ Type * Project St	wo Parent Fa) Fa, Mulan) Solo, Chewb . Han art Data - (3	acca, Jr 92928) Solo, Chewbacca, Jr HMIS Training (Program) (1064) RHY V 11 / 08 / 2018 2 2 10 V: 59 V: 31 V AM V
•	Click "Ad Choose t Set the P Click Sav	d Entry/I he corre Project St e & Cont	Exit" ct Type art Dat inue	e				□ (54915) T □ (392923) □ (392928) □ (9) Solo Project St □ Provider * □ Type * Project St	wo Parent Fa) <u>Fa, Mulan</u>) <u>Solo, Chewb</u> , <u>Han</u> art Data - (3	acca, Jr 92928) Solo, Chewbacca, Jr HMIS Training (Program) (1064) RHY ~ 11 / 08 / 2018 @ 2010 ~: 59 ~: 31 ~ AM ~

 \triangleleft

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 Entry for Youth TH, HP, & PH (2020) TCP assessment. This is the required assessment for all HUD CoC, DHS, and RHY funded programs.



UNIVERSAL DATA ELEMENTS (UDEs)

	Date of Birth	05 / 03 / 2003 🧖 🔿 👰 G
	Date of Birth Type	Full DOB Reported (HUD) V G
	Gender	Gender Non-Conforming (i.e. not exclusively male or female) \vee G
	Primary Race	Asian (HUD) V G
	Secondary Race	White (HUD) V G
	Ethnicity	Non-Hispanic/Non-Latino (HUD) 🗸 G
	Relationship to Head of Household	Self (head of household) V
	Client Location	DC-500 ~ G
Ch	ronic Homelessness Deter	rmination
	Does the client have a disabling condition?	No (HUD) V G
	Prior Living Situation	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD) $ \lor $ G
	Length of Stay in Previous Place	Two to six nights ~ G
	Approximate date homelessness started:	11 / 01 / 2018 🔊 🖏 G
	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	One time (HUD) V G

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

today

One month (this time is the first month) (HUD) $\,\,{\sim}\,\,$ G

CoC-SPECIFIC DATA ELEMENTS

CO	C-SPECIFIC DATA ELEM	ENTS
	Are you engaged with case management?	-Select- 🗸 G
	Homelessness Primary Reason	-Select- V G
	Sexual Orientation	-Select- V G
	If Other, please describe	G
	Have you ever been in foster care?	-Select- V
	Have you ever resided in an institutional setting?	-Select- V G
	Zip Code of Last Permanent Address	G
	Zip Code Data Quality	-Select- V
Cli	ent Contact Informatio	n - Adults Only
	Client Email Address (Optional But Encouraged)	G
	Whose email address is this?	-Select- 🗸 G
	Client Phone Number (Optional But Encouraged)	G
	Whose phone number is this?	-Select- V G
Cli	ent Identification Infor	mation
	Does the client have their birth certificate?	-Select- V
	Does the client have their social security card?	-Select- V G
	Does the client have their state-issued ID?	-Select- V
Cli	ent Education Informat	tion
	Is the client currently in school?	-Select- V
	Received Vocational Training?	-Select- V G
La	nguage Access Questio	ns
	Is the client Limited English (LEP) or Non- English (NEP) Proficient?	-Select- V G
	If yes, what is their primary language?	-Select- V G

The Community Partnership For The Prevention of Homelessness

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

If other language,

please specify:

G



Domestic Violence questions

Domestic Violence Information

Do you have a history of domestic violence?	-Select- V	
If yes, when experience occurred	-Select-	~ G
If yes, are you currently fleeing?	-Select- V	

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

Q Disabilities				HUD Ver	ification 🔺			
visability Type	Disability Determinatio	Above condition is n going to be long term? (Retired)	Start Date *					The Community For The Prev
Add								of Flomeles
		HUD Verification: Disabilitie	es for 10/28	3/2019		10/20/	2017	
 Begin by settin incomplete val For each Disab 	ng all lues to "No" pility, add the	 Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disa as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting put of the second second						Disability Type purposes.
disability type,	, determination,	Disability Determination						
duration, and s Once all Disab 	start date. ilities have	Disability Type	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
been recorded	l via the HUD	Alcohol Abuse (HUD)		0	0	0	0	۲
Verification, cl	ick "Save &	Both Alcohol and Drug Abuse (HUD)	0	0	0	0	0	۲
Exit"		Chronic Health Condition (HUD)	0	0	0	0	0	۲
		Developmental (HUD)	0	0	0	0	0	۲
		Drug Abuse (HUD)	0	0	0	0	0	۲
		HIV/AIDS (HUD)	0	0	0	0	0	۲
		Mental Health Problem (HUD)	0	0	0	0	0	۲
		Physical (HUD)	\odot	0	0	0	0	۲

Oisabilities Disability Type	ability Determination	Above co going to term? (R	ondition is be long tetired)	Start Date *	HUD Verifi	ication 🔔				The Community Partne For The Preventior of Homelessness
Add										
		HUD Verification: A	Add Recor	dset				×		
		Per Disability Ty	Disab	ilities) it	reviou t per D	s records for isability Type
		as of 10/28/	Disability	Туре	Alcohol Abu	use (HUD)		i c	orting	purposes.
			Disability	Determination	Yes (HUD)					
 For each Disability, add the disability type determination duration and 	e disability	Select the Di value for all i Type records	If Yes, Ex long-cont indefinite substanti ability to independ	pected to be of tinued and duration and ally impairs live ently	-Select-		▼ G			
start date.		Disability Type	Above condition is going to be long term? (Retired)		-Select- V G			c	not ted	Incomplete
recorded via the UUD Veri	fication	Alcohol Abuse (HU	Start Date*		10 / 28 / 2019 🔊 े 🖉 G		Þ	-	0	
click "Save & Exit"	incation,	Both Alcohol and D (HUD)					20 20 G		2	۲
		Chronic Health Cor				Save	Ca	ncel		۲
		Developmental (HUU)	0	0	0	0			۲
		Drug Abuse (HUD)		0	0	0	0	0		۲
		HIV/AIDS (HUD)		0	0	0	0	0		۲
		Mental Health Proble	m (HUD)	0	0	0	0	0		۲
		Physical (HUD)		0	0	0	0	0		۲
							Save	Save &	Exit	Exit
		AUG					יטווכ		1	

Income from Any Source -Select- C Q Monthly Income Monthly Start Date * Receiving Income Source? Source of Income Monthly Amount Start Date *	HUD Verification				The Community Par For The Preven of Homelessne
Add View Gross Income Total Monthly Income G	HUD Verification: Monthly Income for 10/28/20 Per Source of Income, the current records for Monthly I i records for Monthly Income not overlapping as of this date Source of Income as of 10/28/2019, records containing "Y put Select the Receiving Income Source? value for all incomplete Source of Income records	19 ncome as of 10/ are not displaye es" values will b poses. ollected	28/2019 are di ed. In the even e displayed and	splayed below. A t that multiple re d take precedence	ny previous cords exist per e for reporting
 Begin by setting all incomplete values to 			Receiving 1	income Source?	
"No"	Source of Income	Yes	No	Data Not Collected	Incomplete
 For each source of income. add the 	Alimony or Other Spousal Support (HUD)	0	0	0	۲
	Child Support (HUD)	0	0	0	۲
income source, receiving income source	Earned Income (HUD)		0	0	۲
= Yes, monthly amount and start date.	General Assistance (HUD)	0	0	0	۲
	Other (HUD)	0	0	0	۲
 Once all income sources have been 	Pension or retirement income from another job (HUD)	0	0	0	۲
recorded via the HUD Verification, click	Private Disability Insurance (HUD)	0	0	0	۲
	Retirement Income From Social Security (HUD)	0	0	0	۲
"Save & Exit"	SSDI (HUD)	0	0	0	۲
	SSI (HUD)	0	0	0	۲
	TANF (HUD)	0	0	0	۲
	Unemployment Insurance (HUD)	0	0	0	۲
	VA Non-Service Connected Disability Pension (HUD)	0	0	0	۲
	VA Service Connected Disability Compensation (HUD)	0	0	0	۲
	Worker's Compensation (HUD)	0	0	0	۲
			Save	Save & Exit	Exit

Receiving



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

	Receiving Benefit?								
Source of Non-Cash Benefit	Yes	No	Data Not Collected	Incomplete					
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)		0	0	۲					
Special Supplemental Nutrition Program for WIC (HUD)	0	0	0	۲					
TANF Child Care Services (HUD)	0	0	0	۲					
TANF Transportation Services (HUD)	0	0	0	۲					
Other TANF-Funded Services (HUD)	0	0	0	۲					
Other Source (HUD)	0	0	0	۲					
		Save	Save & Exit	Exit					

Covered by Health Insurance -Select-	▼ G				
Q Health Insurance	HUD Verifi	cation 🛕			
Start Date * Health Insurance Type Add	Covered? End Date			т	he Community Partnersh For The Prevention of Homelessness
	HUD Verification: Health Insurance for 10/28/201	19			
 Begin by setting all incomplete values to "No" For each type of Health Insurance 	 Per Health Insurance Type, the current records for Health Insurance for Health Insurance not overlapping as of this date per Health Insurance Type as of 10/28/2019, records contained reporting Select the Covered? value for all incomplete Health Insurance Type records Yes No Data Not Coll Incomplete 	surance as of 10 e are not display ining "Yes" value purposes. <u>ected</u>	0/28/2019 are ved. In the eve es will be disp	e displayed below. ent that multiple r layed and take pr	Any previous records exist ecedence for
• For each type of meanin insurance,	Use bld Territoria Territoria				
add the Health insurance type,	Health Insurance Type	Yes	No	Data Not Collected	Incomplete
covereur = Yes	MEDICAID	0	0	0	۲
 Once all Health Insurance sources 	MEDICARE	0	0	0	۲
have been recorded via the HUD	State Children's Health Insurance Program	0	0	0	۲
Verification, click "Save & Exit"	Veteran's Administration (VA) Medical Services	0	0	0	۲
	Employer - Provided Health Insurance	0	0	0	۲
	Health Insurance obtained through COBRA	0	0	0	۲
	Private Pay Health Insurance	0	0	0	۲
	State Health Insurance for Adults	0	0	0	۲
	Indian Health Services Program	0	0	0	۲
	Other	0	0	0	۲
			Save	Save & Exit	Exit

Youth-Specific Questions

Youth Referral Source

_		
	Referral Source	-Select-
	Youth Eligible for RHY Services	-Select- 🗸 G
	If No for "Youth Eligible for RHY Services", Reason why services are not funded by BCP grant	-Select-
	If Yes for "Youth Eligible for RHY Services", Runaway youth	-Select- V G
Yo	uth School Status	
	School Status (HUD)	-Select- 🗸 G
	Last Grade Completed (HUD)	-Select- V
Yo	uth Employment Status	ē .
	Employed? (HUD)	-Select- V G
	If Yes, Type of Employment	-Select- V
	If No, Why not Employed	-Select- V G
Yo	uth Health Status	
	General Health Status	-Select- 🗸 G
	Dental Health Status	-Select- V G
	Mental Health Status	-Select- V G
Yo	uth Pregnancy Status	
	Pregnant?	-Select- V G
	If Yes, Projected Birth Date	//



These are questions that are specific for youth providers.

These are required for all heads of household and adults.

Youth Child Welfare/Foster Care History

Formerly a Ward of Child Welfare/Foster Care Agency	-Select- V G
Number of Years	-Select- 🗸 G
If Less than one year, Number of Months	-Select- 🗸 G

Youth Juvenile Justice System History

	Formerly a Ward of Juvenile Justice System	-Select- V
	Number of Years	-Select- V G
	If Less than one year, Number of Months	-Select- 🗸 G
а	mily Critical Issues	
	Unemployment - Family member	-Select- 🗸 G
	Mental Health Issues - Family member	-Select- 🗸 G
	Physical Disability - Family member	-Select- 🗸 G
	Alcohol or Substance Abuse - Family member	-Select- 🗸 G
	Insufficient Income to support youth - Family member	-Select- 🗸 G
	Incarcerated Parent of Youth	-Select- 🗸 G

Required for All Permanent Housing Programs

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

			_
HOUGH	01/0-	100	Date
HUUS	iuve-		Date

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- This is a continuation of the youth specific questions.
- Housing Move-In-Date will be detailed in the following slide.



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

Client Informa	tion		Service Transactions										
Summary	Client Profile	Households	ROI	Ĭ	Entry ,	/ Exit	Case Manager	sĬ Ca	se Plans	Measurement	s As	sessme	ents
	1	Reminder: Househ	old members n	nust b	be establ	ished on I	Households tab bef	ore ci	reating Entry /	Exits			
Entry /	Exit												
Program				Туре	e		Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
蘭 HMIS Trai	ning (Program) (1064)		HUD			10/28/2019			E.	E	8	Â,
Add Entry	/ Exit					5	Showing 1-1 of 1)		
												Exi	t



Creating an Update/Annual Assessment

Client Informati	on				Service Transactions					
Summary	Client Profile	Households	ROI	Entry /	Exit	Case Managers	Case Plans	Measurements	Assessments	
	0	Reminder: Househ	old members	s must be establis	shed on	Households tab befor	e creating Entry /	' Exits		
Entry /	Interim Review	s				×	1			
Program	Interim Rev	views Associated	with this E	intry / Exit)	Exit Date	Interims Fol	low Client os Count	
蘭 HMIS Trair	Review Da	te Review Type				Client Count		E E	1 🔊 🎉	
Add Entry /	Add Interim Rev	iew		No matches.						
									Exit	
•							-			
						Exit	1			
						Exit	1			



Creating an Update/Annual Assessment

ient Informati	ion				ĭ	Servio	e Transactions			
Summary	Client	Profile	Households	ROI	Entry /	Exit	Case Managers	Case Plans	Measurements Assessm	ents
	A	dd Inter	rim Review - (9) Solo, Han					x	
Entry /	Interi	Inte	rim Review Data							
Program		Entry	/ Exit Provider	HMIS Train	ing (Program) (1	.064)			Interims Follow Clier Ups Cour	t t
HMIS Train		Entry	/ Exit Type	HUD					E E XO	14
Add Entry /	Add	Inter	rim Review Type	* -Select-	\sim					
		Revie	ew Date*	10 / 28 /	2019 🥂 🕽	🤯 5 🕔		1 🗸	F	vit
· · ·										
	-									
							Save & Co	ntinue Can	scel	
							Save & Co	Can		



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.

y / Exit Interim Review	v	
Interim Review Data		
Entry / Exit Provider	HMIS Training (Program) (1064)	
Entry / Exit Type	RHY	
Interim Review Type	Annual Assessment	
Review Date	11/08/2019 11:15:37 AM	
Interim Review Assess	nent	
Household Members	Youth Programs Update 2020 TCP	Interim Review Date: 11/08/2019 11:15:37 AM
(392928) Solo, Chewbacca, Ji Age: 10 Veteran: No (HUD)	CLIENT LOCATION UPDATE (IF APPLICABLE)	
,	Client Location DC-500 🗸 G	
	CoC-SPECIFIC DATA ELEMENTS	
	Are you engaged with case -Select- v G management?	
	Client Contact Information - Adults Only	
	Client Email Address (Optional But Encouraged)	
	Whose email address -Select-	✓ G
	Client Phone Number (Optional But Encouraged)	G
	Whose phone number is this?	~ G

Rapid Rehousing 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

 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.

27 💭 27 G

- 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.

Show All Non-Cash Benefits Records

🤹 🔀



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.

	N	on-Cash Benefits					
		Provider	Date Effective	Source of Non- Cash Benefit	Receiving Benefit?	Start Date	End Date
/	Ì	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
/	1	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	
/	0	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	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
/	đ	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	
/	1	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	
/	Ì	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	
	Add	i		Showir	ng 1-8 of 8		
							Exit
	_						

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

🤹 🔀

The	Community Partnership For The Prevention of Homelessness

Non-Cash Benefits												
		Provider	Date Effective	Source of Non- Cash Benefit	Receiving Benefit?	Start Date	End Date					
/	Ţ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017						
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017						
/	0	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						
/	1	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						
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017						
/	đ	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						
	Ì	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						
2	Ì	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						
	Add	1		Showir	ig 1-8 of 8							
							Exit					

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.

Show All | Edit Recordset - (9) Solo, Han 8 4 峰 🔬 Non-Cash Benefits Non-The Community Partnership For The Prevention Pr Source of Non-Cash Supplemental Nutrition Assistance Program (Food Stamps) (HUD) 🗸 G Benefit No **Receiving Benefit?** ~ G Ho Inf If Other, Please Specify (H G Dis Amount of Non-Cash Benefit 0 Inf 27, 🔿 27, G 05 / 16 / 2017 Start Date* (HI 10 / 27 / 2019 27, 🔿 27, G End Date Print Recordset Save Cancel TANF 05/16/2017 Homeless Management Transportation No 05/16/2017 Information System 3:19:54 PM Services (HUD) (HMIS) (2) District of Columbia Homeless Management TANF Child Care 05/16/2017 No 05/16/2017 Information System 3:19:54 PM Services (HUD) (HMIS) (2) District of Columbia Special Homeless Management 05/16/2017 Supplemental 05/16/2017 No Information System Nutrition Program 3:19:54 PM for WIC (HUD) (HMIS) (2) Supplemental District of Columbia Nutrition Homeless Management 05/16/2017 10/27/2019 Assistance No 05/16/2017 Information System 3:19:54 PM Program (Food (HMIS) (2) Stamps) (HUD) Add Showing 1-8 of 8 Exit

of Homelessness

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.

						~								
Non-(Non-Cash B	Non-Cash Benefits												
Pro	Source of Non-C Benefit	ash Supple	mental Nutrition Assis	tance Prog	ram (Food Stamps) (HUD)) √ G Pate								
Dis Dis	Receiving Benefi	t? Yes	Yes V G											
Info (H№	If Other, Please \$	Specify												
Dist Hor Info (HM		G												
Dist Dist	Amount of Non-O Benefit	Cash	G											
· 🎽 Info (HM	Start Date*	10 / 2	8 / 2019 🛛 🔊 🦧	G		_								
Dist Dist	End Date	End Date / / 2010 2010 2010												
Note Note Note Note Note Note Note Note					Save Cano	el								
Dist Hor Info (HM	rict of Columbia neless Management ormation System IIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017									
Dist Hor Info (HM	trict of Columbia neless Management prmation System IIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No										
Dist Hor Info (HM	trict of Columbia neless Management ormation System IIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017									
Dist Hor Info (HM	trict of Columbia neless Management ormation System IIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	05/16/2017	10/27/2019									
Add			Showi	ng 1-8 of	8									



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

The Community Partnership For The Prevention of Homelessness



Section 2: The Household is in your Program Part 2: Case Plans



• Case Plans are required for DHS and TCP funded 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							ī				
Release of Information: None -Switch to Another Household Member-											r- ∨	Submit
Clie	nt Information		· · · · ·			Service	e ira	nsactions				
Su	mmary Cl	ient Profile	Households	ROI	Entry	/ / Exit	Cas	e Managers	Case Plans	Measurements	Asse	ssments
Ado	led to the system (02/23/2001 02:	45 PM)
	Name	Solo, Han				Gender		Male			Second Second	13-1
	Date of Birth	05/02/1994	(Age 25)		1	Primary Rao	e	White (HUD)				
	Social Security 202-20-2020			1	Secondary Race U.S. Military Veteran?					TR.		
							L N	Yes (HUD)			<u> </u>	

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

Client Informa	ation			Servic	e Transactions				~						1
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measureme	nts Assessments							
Case M	lanagers							· · · · · · · · · · · · · · · · · · ·						The Communi For The P	ity Partnershi Prevention
N	lame	Provider				Phone Numb	ber Start D	ate End Date						of Home	elessness
📈 🧟 🦉 K	Kurstin Powell	Community Co	unity Connections (CCDC)(Agency)			04/09/2	019								
🖊 🧶 🦉 🗉	Daijah Walters	Casa Ruby (Ag	ency)			202-355-515	5 01/21/2	Caco Mana	aor						N.
🖊 🥥 🧋 E	Brandon James	DHS - Project F	Reconnect - HP IN	D - DHS Direct			01/04/2	Case Mana	yer						
🖊 😧 🦉 🕻	Charlene Dion Cotton	Community Co	nnections (CCDC))(Agency)		2025461512	04/09/2	(_	(2) 2 1					•
🖊 🥥 🧋 A	Adam Weaver	CCDC - Coordi	inated Entry for Al	DULT Single Individua	als CABHI Grant		05/09/2	Case	lanag	ger - (9) Solo, Han					A
Add Case	Manager			S	howing 1-5 of 5										
								▼ Hous	sehold	l Members					
								No House	old M	lembers were original	ly assoc	iated.			
												Include	Additional Ho Members	usehold	
•	Choose	whether	the Cas	e Manage	er is a			Type*		O <u>ServicePoint User</u>	О <u>ме</u>	• Other			
	ServiceP	oint Use	er, Yourse	elf, or som	eone else	2.		Name*		Obi Wan Kenobi					
		<u>.</u>						Title		Jedi Master					
•	Complet	e the co	ntact inf	formation				Phone Nu	ımber	555-456-3126					
								Email Ad	dress	Obiwan@jedimasters.o	rg				
•	Click Sav	ve Case N	∕lanager					Provide	r*	District of Columbia Homeless Management Information System (H (2)	MIS)	Search	My Provider	Clear	
								Start Da	te*	10 / 27 / 2019 🧖	J 🦉				
								End Date			3 🦧				
												Save Ca	ase Manager	Exi	it


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 <u>Case Plans</u> tab in ClientPoint:

	Client - (9) So	olo, Han								Mass Visit	oility Update 🏻 🎧
(9) Solo, Han Release of Informa	tion: None							-Switch to Another	Household Membe	r- 🗸 Submit
Clier	t Information					Service	e Tra	insactions			
Su	mmary (lient Profile	Households	ROI	Entry	/ Exit	Cas	se Managers	Case Plans	Measurements	Assessments
Add	ed to the system	02/23/2001 02	:45 PM							J]
	Name	Solo, Han			C	Gender		Male			THE PARTY OF
	Date of Birth	05/02/1994	(Age 25)		F	Primary Rac	е	White (HUD)			
	Social Security	202-20-2020	0		S F	Secondary Race					C.M.
					L V	J.S. Military /eteran?		Yes (HUD)			
						·					
	Release of I	nformation				Fn	trv/	Fxits			



Step Two: On the Goals Screen click <u>Add</u> <u>Goal</u>:

ent In	formatio	on				ľ	Servic	e Transa	ctions					_
umma	ary	Client Profile	Households	ROI	``````````````````````````````````````	Entry / E	Exit	Case M	anagers	Case Plans	Measu	iremen	ts Assessm	ier
G	ioals													
	Provid	er	Classific	ation	Туре		Da	ate Ided	Date , Set	User Updating	Status	Notes	Latest Note Date	
/ 🧋	Commu (Agency	nity Connections ((CCDC) Employme	ent	Obtain empl	oyment	04	/09/2019	04/09/201	9 Chris Fischer	In Progress	6	04/09/2019	
/ 🧋	Commu (Agency	inity Connections ((/)	CCDC) Employme	ent	Obtain empl	oyment	04	/09/2019	04/09/201	9 Kurstin Powell	In Progress	<i>(</i>	04/09/2019	
/ 🧋	Commu (Agency	inity Connections ((/)	CCDC) Employme	ent	Obtain empl	oyment	04	/09/2019	04/09/201	9 Chris Fischer	In Progress	40	04/09/2019	
/ 🧋	Commu (Agency	inity Connections ((/)	CCDC) Education		Get GED		02	/26/2019	02/25/201	9 Chris Fischer	Closed	6	02/26/2019	
/ 🧋	Commu (Agency	nity Connections ((CCDC) Case Managem	ent	90 Day Cas	e Plan Upda	ite 02	/07/2019	02/07/201	9 Chris Fischer	In Progress	6	02/07/2019	
/ 🧋	DHS - P IND - D	Project Reconnect - HS Direct	HP Project Reconnec	t	Mediation S	ervices	01	/04/2019	01/04/201	9 Eileen Kroszner	In Progress			
/ 🧋	DHS - P IND - D	Project Reconnect - HS Direct	HP Project Reconnec	t	Mediation Se	ervices	01	/04/2019	01/04/201	9 Eileen Kroszner	In Progress			
/ 🧋	DHS - P IND - D	Project Reconnect - HS Direct	HP Project Reconnec	t	Mediation Se	ervices	01	/04/2019	01/04/201	9 Eileen Kroszner	In Progress			
/ 🧋	PHDC - ADULT S Outread	Coordinated Entry Single Individuals ch Grant	for SPDAT		C. Medicatio	n	05	/31/2017	05/31/201	7 Eileen Kroszner	In Progress			
/	NSV - C ADULT S	Coordinated Entry fo Single Individuals	or SPDAT		A. Mental He Wellness & G Functioning	ealth & Cognitive	05	6/19/2017	05/19/201	7 Gabriel DeLong	In Progress			

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

Once complete, click "Add Goal"

Goal - (9) Solo. Hi	an
✓ Household Member	ers
 To include Housel me (48241) Two Paren (1) Client, Example (9) Solo, Han 	hold members for this Goal, click the box beside each name. Only ambers from the SAME Household may be selected. It Family
Provider*	District of Columbia Homeless Management Information System (HMIS) (2) Clear
Case Manager	-Select-
Date Goal was Set*	10 / 28 / 2019 🙇 💐
Classification *	-Select-
Type*	-Select- v
Target Date	
Overall Status*	
If Closed, Outcome If Partially Complete, Percent Complete	-Select // / / / /
Projected Follow Up Da Follow Up User	ate / / /
·	Homeless Management Information System (HMIS) (2) -Select-
Follow Up Made	Homeless Management Information System (HMIS) (2) -Select- v
Follow Up Made Completed Follow Up [Homeless Management Information System (HMIS) (2) -Select- Date //// 2000 2000 -Select-





Case Notes

Case Note	- (9) Solo, Han
▼ Household	1 Members
No Household M	lembers were originally associated.
Provider*	District of Columbia Homeless Management Information System (HMIS) Search My Provider Clear (2)
Case Manager	Obi Wan Kenobi 🗸
Note Date*	10 / 28 / 2019 🕂 🤇 🦉
Note*	Add Case Notes Here.
	Save Case Note Cancel

Case Notes					
Provider		Case Manager U	ser Creating	Note Date	Note
District of Columbia Information System	a Homeless Management n (HMIS)	s	arah Honda	01/24/2017	write in note here
Add Case Note		Showing 1-1 of	1		
Action Steps Pla	anned				
Action Step		Target Dat	e Status	Out	come
Add Action Step		No matches	5.		
Service Items f	or this Goal				
Date Set Create	d By Need Ty	/pe	Need Sta	tus Outo	ome of Nee
Add Service A	Add Multiple Services	No mat	ches.		
Print		Save Goal	Sa	ve & Exit	Exit

	Action Step	2	
	Action Step - (9) Solo), Han	
Action Stone	▼ Household Members		The Community Partnership For The Prevention of Homelessness
ACTION STEPS	No Household Members we	ere originally associated.	
	Provider*	District of Columbia Homeless Management Information System (HMIS) (2)	
Case Notes	Date Action Step was set	10 / 28 / 2019 🙇 🤇	
Provider Case Manager User Creating Note Date Note	Action Step*		
Sarah Honda 01/24/2017 white in fold			
Add Case Note Showing 1-1 of 1			
Action Steps Planned	Target Date		
Action Step Target Date Status Outcome	Overall Status*	-Select- 🗸	
Add Action Step No matches.	If Closed, Outcome	-Select- V / / 20 3	
Service Items for this Goal	Projected Follow Up Date		
Date Set Created By Need Type Need Status Outcome of Need	Follow Up User	District of Columbia	
Add Service Add Multiple Services No matches.		Homeless Management Information System (HMIS) Search My Provider Clear	
Print Save Goal Save & Evit Evit		(2) (2)	
	Follow Up Made	-Select- V	
	Completed Follow Up Date		
	Outcome at Follow Up	-Select-	
	L		1
		Save Action Step Cancel	



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**):

Project	ed Follow Up Date	/ // 🧖 🔿 🦓
Follow	Up User	District of Columbia Homeless Management Information System (HMIS) (2) -Select-
Follow	Up Made	-Select- 🗸
Comple	eted Follow Up Date	
Outcom	ne at Follow Up	-Select-

Save Action Step Cancel



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**):





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.



Part 3: Household/ client leaves your Program Part 1: Exiting a single

client



•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							Mass Visib	ility Update 🏻 🎧
(9) Solo, Han Release of Info	rmation: None						-Switch to Anothe	r Household Membe	r- 🗸 Submit
Client Informatio	on				Servic	e Transactions			
Summary	Client Profile	Households	ROI	Entry /	Exit	Case Managers	Case Plans	Measurements	Assessments
Entry / E	() xit	Reminder: Househo	old members n	ust be establis	hed on H	ouseholds tab befor	e creating Entry / I	Exits	
Program				Туре		Project Start Date	Exit Date	Interims Fo	ollow Client Jps Count
🗋 HMIS Traini	ng (Program) (1064	4)		HUD	/	10/01/2018	1	lo	È. 🔏 🇳
Add Entry /	Exit				S	howing 1-1 of 1			
									Exit



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.

dit Exit Data - (9) S	olo, Han	×
Household Memb	ers	
(54915) Two Par	update Household members for this Exit Data, click the box beside each name.	
□ <u>(392923)</u> Fa, Mula □ <u>(392928)</u> Solo, C ☑ <u>(9)</u> Solo, Han	hewbacca, Jr	
Edit Exit Data - <mark>(</mark> 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		
	Save & Continue	Cancel



- 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.

Ent	y/	Exit Data												e,	×
0	I	Note: If you change th	ne provider se saved t	ected it i to the pre	may cause the As evious Assessmer	sess it wil	ments to adj I still be attao	ust :he	for the d to that	new Pro t Assess	vider's Entry/Exi ment record for	t Assessme the Client.	nt defaults. Any infor	mation	ı
	Pro	vider*		HMIS (1064)	Training (Program))				Search	My Provider	Clear]		
	Тур	9e*		HUD Upd	✓ate										
F	н	ousehold Members Name	Associated v Head of Household	vith this	Entry / Exit Project Start Date		Exit Date	Iı	terims	Follow Ups	Reason for Leaving	Destinati	on	No	tes
49 49	<u>م</u>	(392923) Fa, Mulan (392928) Solo, Chewbacca, Jr	Yes		10/01/2018 10/01/2018		•		Eo	E					
Ð	ŵ	(9) Solo, Han	No	/	10/01/2018	1	10/30/2019		6	E.		Rental by housing si	client, no ongoing ıbsidy (HUD)		
	Ir	nclude Additional Hous Members	sehold						Showin	g 1-3 o	f 3				
E	ntry	Assessment					Б	cit	Assess	ment					
	ł	lousehold Members	5	HUD Co	C & ESG Exit (20)20)	ТСР					Exit Date: :	10/30/2019 01:42:53	рм 🔒	
	(9 A V) Solo, Han ge: 25 ateran: Yes (HUD)	CoC-	SPECIFI re you (ith case ianagen	IC DATA ELEMEN engaged enent?	Yes	~ G								
			Clier	t Conta	ct Information ·	Ad	ults Only								



Part 3: Household/ client leaves your Program

Part 2: Exiting a Household

 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 - (39	2923) Fa, Mular	n						Mass Visi	oility Update	4
	(392923) Fa, Mu Release of Infor	lan mation: None						-Switch to Anothe	r Household Membe	er- 🗸 Subr	mit
C	lient Informatio	on				Service	Transactions				
Ĺ	Summary	Client Profile	Households	ROI	Entry	/ Exit	Case Managers	Case Plans	Measurements	Assessmen	its
	Entry / E	() xit	Reminder: Househo	ld members m	nust be establ	ished on Ho	ouseholds tab befor	re creating Entry / E	Exits		
	Program				Туре		Project Start Date	Exit Date	Interims F	ollow Client Ups Count	
	蘭 HMIS Trainir	ng (Program) (1064)		HUD	/	10/01/2018	2	lo	E 🔏 /	i.
	Add Entry / I	Exit				Sł	owing 1-1 of 1				
										Exit	



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.

Hausah - Li M		
Household Memb	ers	
(1) To	update Household members for this Exit Data, click the box beside each name.	
🗌 (54915) Two Par	ent Family	
⊻ <u>(392923)</u> Fa, Mul	an	
(392928) Solo, C	Chewbacca, Jr	
(9) Solo, Han (E)	kit Date: 10/30/2019 1:42 PM)	
Edit Exit Data - (3	92923) Fa, Mulan	
Exit Date*	10 / 29 / 2019 🕂 💐 2 🗸 : 22 🗸 : 24 🗸 PM 🗸	
Reason for Leaving	-Select-	
If "Other", Specify		
Destination *	-Select-	
Destination* If "Other", Specify	-Select-	
Destination* If "Other", Specify Notes	-Select-	
Destination * If "Other", Specify Notes	-Select-	
Destination * If "Other", Specify Notes	-Select-	



- 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, HMIS Training (Program) Provider* Search My Provider Clear (1064)Type* HUD \sim Update Household Members Associated with this Entry / Exit Exit Date Interims Follow Reason for Head of Project Start Destination Notes Name Ups Leaving Household Date Permanent housing (other than RRH) (392923) Fa, Mulan Yes 10/01/2018 11/03/2019 0 E. for formerly homeless persons (HUD) Permanent housing (other than RRH) (392928) Solo, 0 E. No 10/01/2018 11/03/2019 Chewbacca, Jr for formerly homeless persons (HUD) Rental by client, no ongoing housing 0 F. 🎎 (9) Solo, Han 10/01/2018 10/30/2019 No subsidy (HUD) Include Additional Household Showing 1-3 of 3 Members Exit Assessment Entry Assessment Household Members HUD CoC & ESG Exit (2020) TCP Exit Date: 11/03/2019 02:22:24 PM 🔒 (392923) Fa, Mulan CoC-SPECIFIC DATA ELEMENTS Age: 36 Veteran: Yes (HUD) Are you engaged -Select- 🗸 G (392928) Solo, Chewbacca, Jr with case management? Age: 10 Veteran: No (HUD) Client Contact Information - Adults Only (9) Solo, Han Client Email Address Age: 25 (Optional But Veteran: Yes (HUD) Encouraged)





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.

ogram				Туре		Project Start Date	Exit	Date	Interims	Follow Ups	Clien Coun	t t
IS Training	g (Program) (1064)			HUD	/	10/28/2019	/ 10/2	8/2019	6	E.	- 🔊	-
d Entry / Ex	xit					Showing 1-1 of	f 1					
Edit	Exit Data - (9) S	olo, I	Han							×	F	vit
	🧃 Edit Exit Data -	(9) 5	iolo, Han									
	Exit Date*	10 /	28 / 2019 🧞	1 0 2 6 v	: 05 🗸 :	54 🗸 PM 🗸						
	Reason for Leaving	-Sele	ct-					\sim				
	If "Other", Specify											
	Destination*	Perm	anent housing (other than RRH	I) for form	erly homeless per	sons (HUD)			~		
	If "Other", Specify											
	Notes											
			Please C	onfirm			×					
			Are v	ou sure v	ou want	to delete thi	is Exit					
			📣 Data	?								
					Yes	No						
					100							



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.

Summary				Se	rvice Transactions	
Summary Client Profile Households ROI Entry					Case Managers	Case P
	🚺 Rem	inder: Household	d members mus	st be established	on Households tab be	fore cre
I In	iterim Reviews					×
Pr	Interim Review	ıs Associated w	vith this Entry	/ Exit		t
<u>а</u> ни	Review Date	Review Type			Client Cou	nt
Ad	/ 10/28/2019	Update				
	Add Interim Review		Showing 1	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 In	nterim Review Data		
n 🗾 1	Interim Review Data		The Community Partnership For The Prevention of Homelessness
Er	ntry / Exit Provider	HMIS Training (Program) (1064)	
Er Er	ntry / Exit Type	HUD	
Ir	nterim Review Type*	Update 🗸	
R	eview Date*	10 / 28 / 2019 🕂 🎘 5 🗸 : 42 🗸 : 12 🗸 PM 🗸	
		Save & Continue Cancel	
	Add Interim Review	Showing 1-1 of 1	
٦		Exit	



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.









Added: Timely log in

Added: Successful completion of training

Added: Annual Security Training Requirement





Added: Recertification Training Added: HMIS Training as Remedial Training

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.



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.



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.





Second Violation

30-day suspension

No Shortening of Suspension



•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.



Third Violation



Review Panel Formed



Minimum 30-day suspension



•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 <u>HMIS@community-partnership.org</u>. 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://communitypartnership.org/providers/training
 - Have questions about the trainings? Email the helpdesk!





Thanks for participating!

Questions?

HMIS Help-Desk Email: <u>hmis@community-partnership.org</u>

10/1/2020

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