HMIS Training

DC 104: LOW BARRIER SHELTERS AND SEVERE WEATHER SHELTERS

Agenda

- HMIS Basics Recap
- Introduction to ShelterPoint
- Checking a client into a bed
- Creating a new client
- Completing Client Profile information
- Low Barrier Assessment
- Case Plans
- Exiting a client from a bed
- Exiting multiple clients from beds
- 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!

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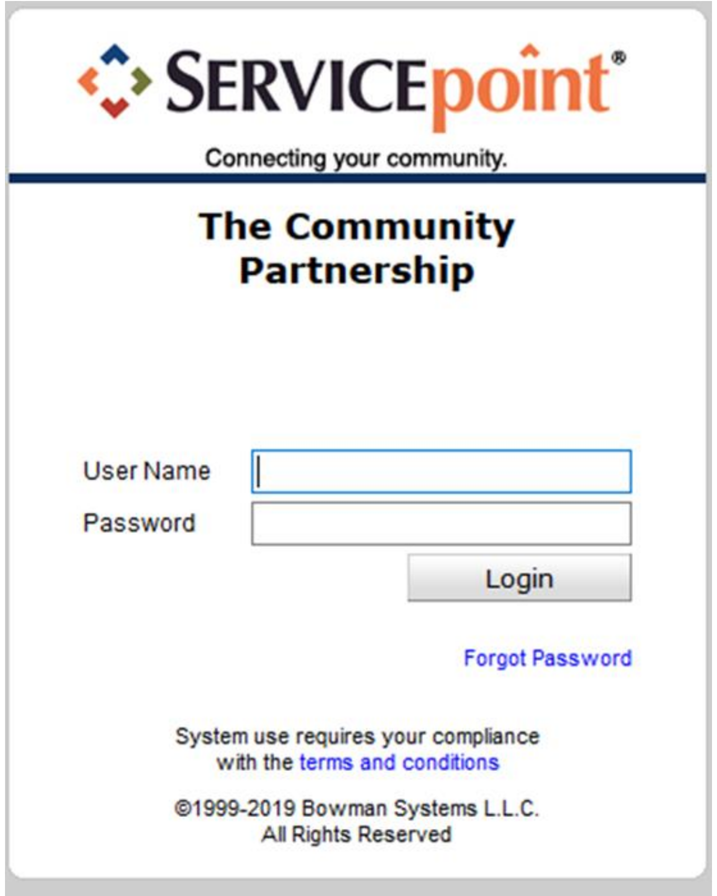
ServicePoint – DC's HMIS Software



Who Can See What?

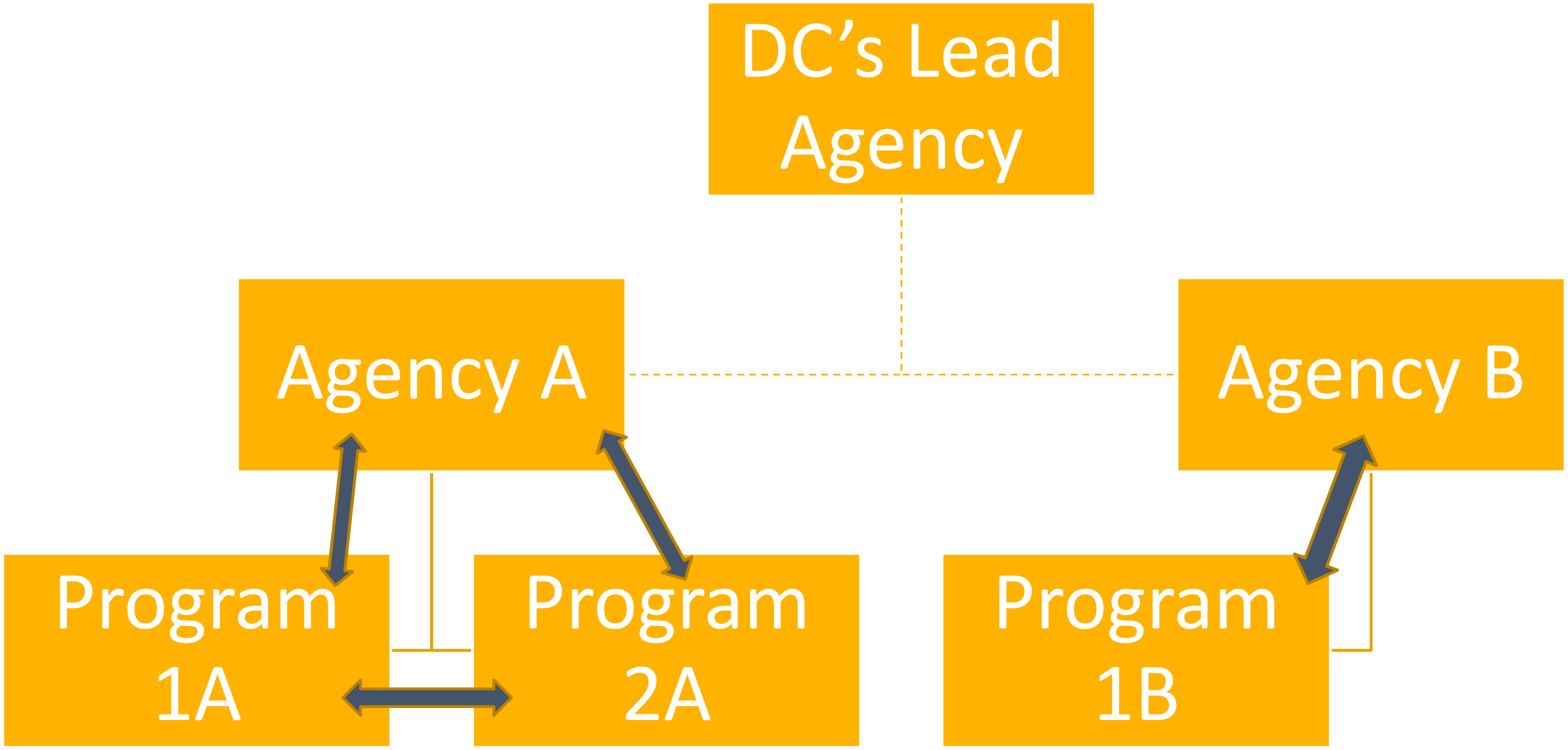
Visibility and Data Security

- 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



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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

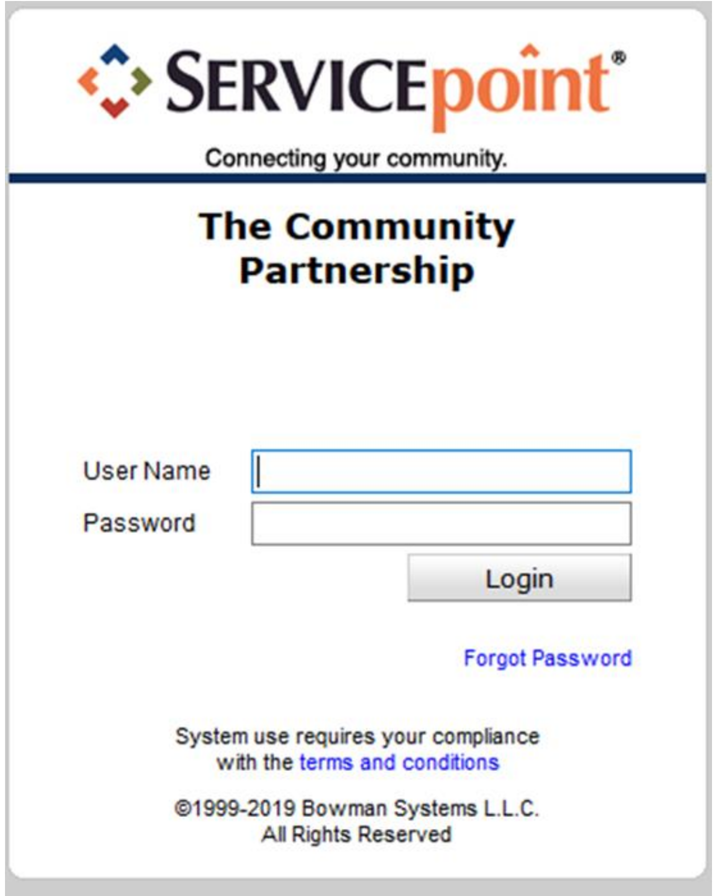
- There is not currently a standard ROI for the CoC but that is being worked on.
- Once more information is available we will update you all on this new document, and the processes involved.

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/



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

Logging In

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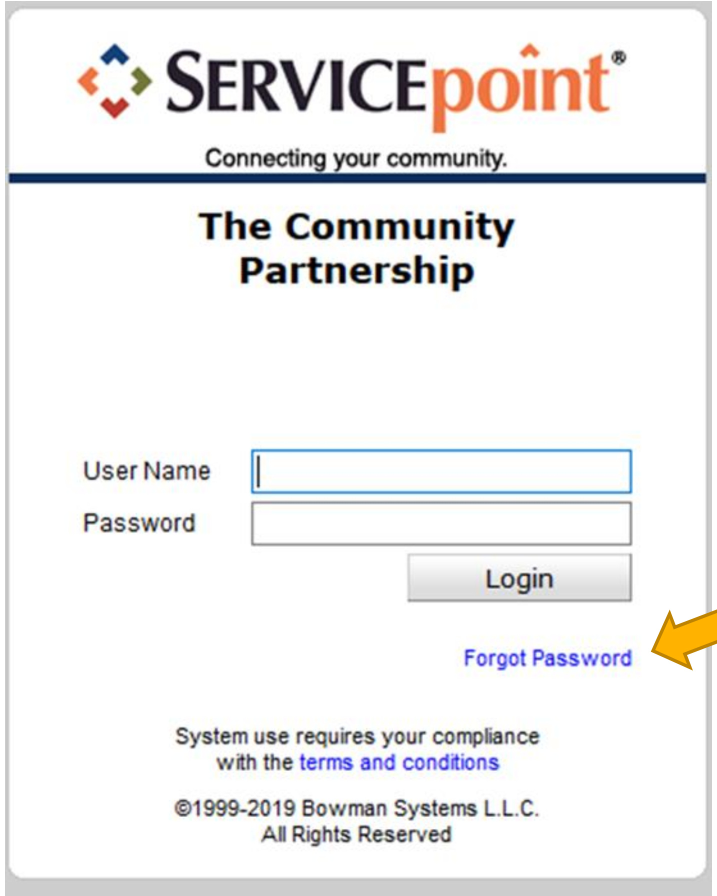


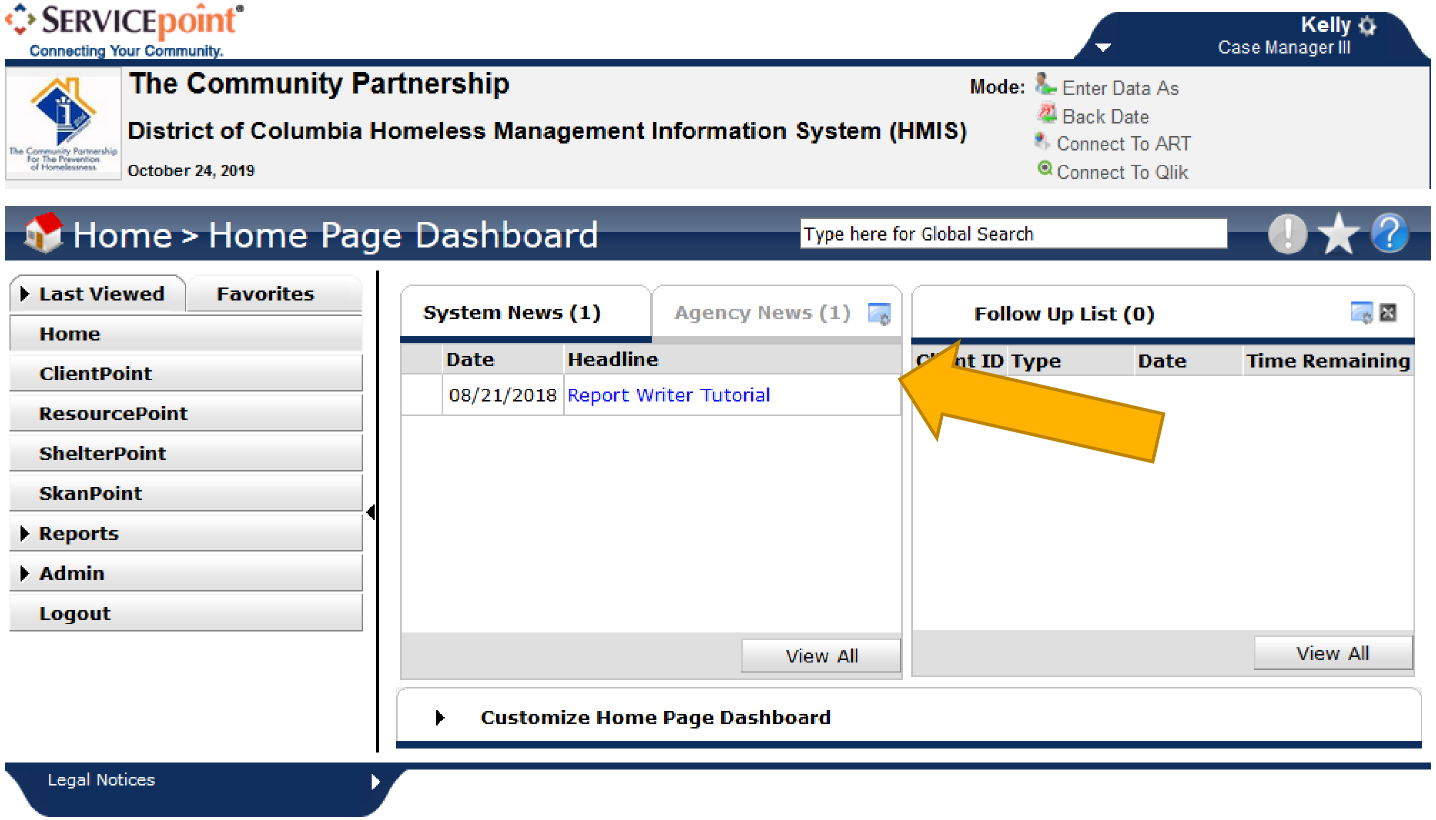
Live site:
https://washdc.servicept.com

Forgot your password?

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…



What is Enter Data As?

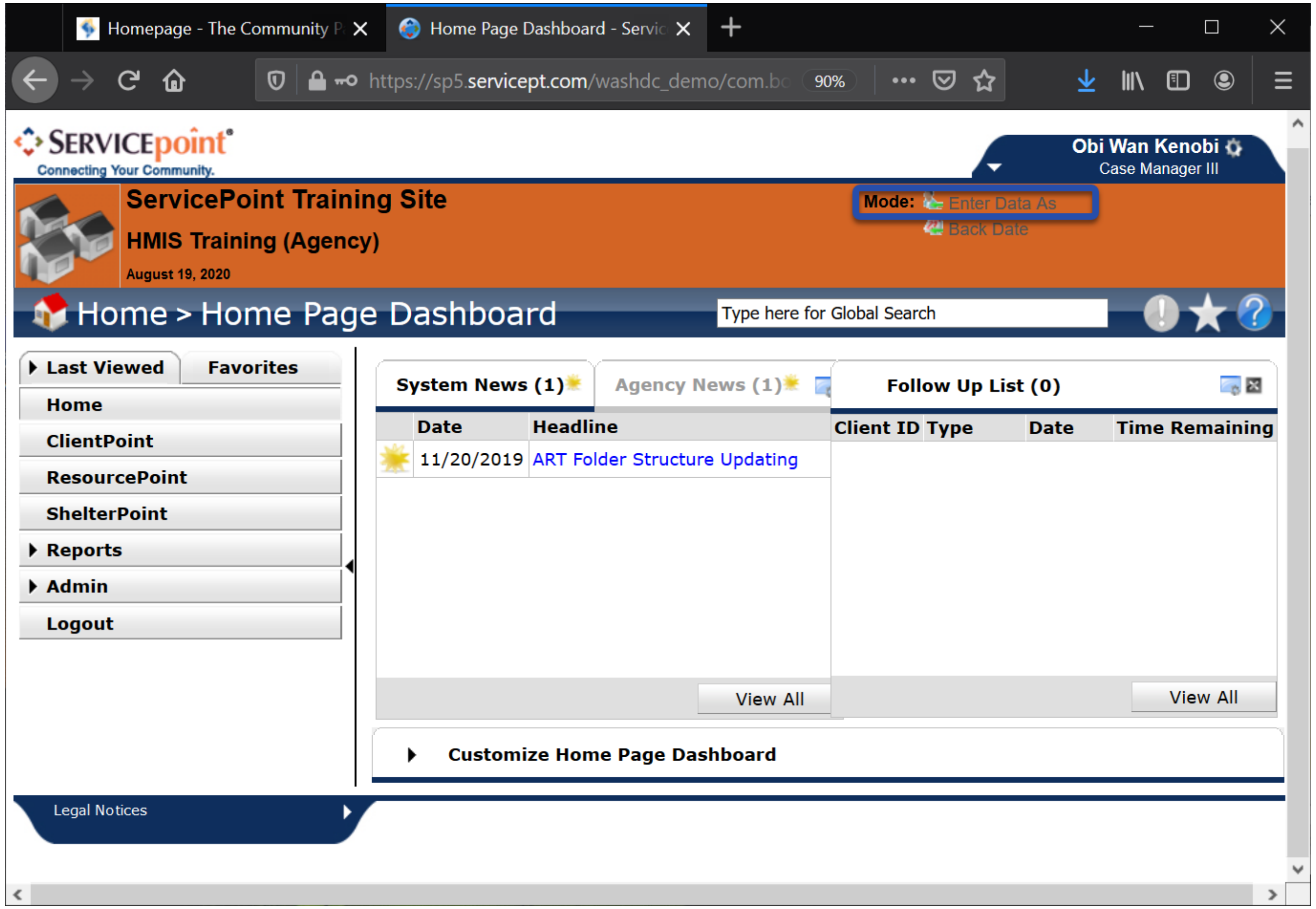
- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.

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

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



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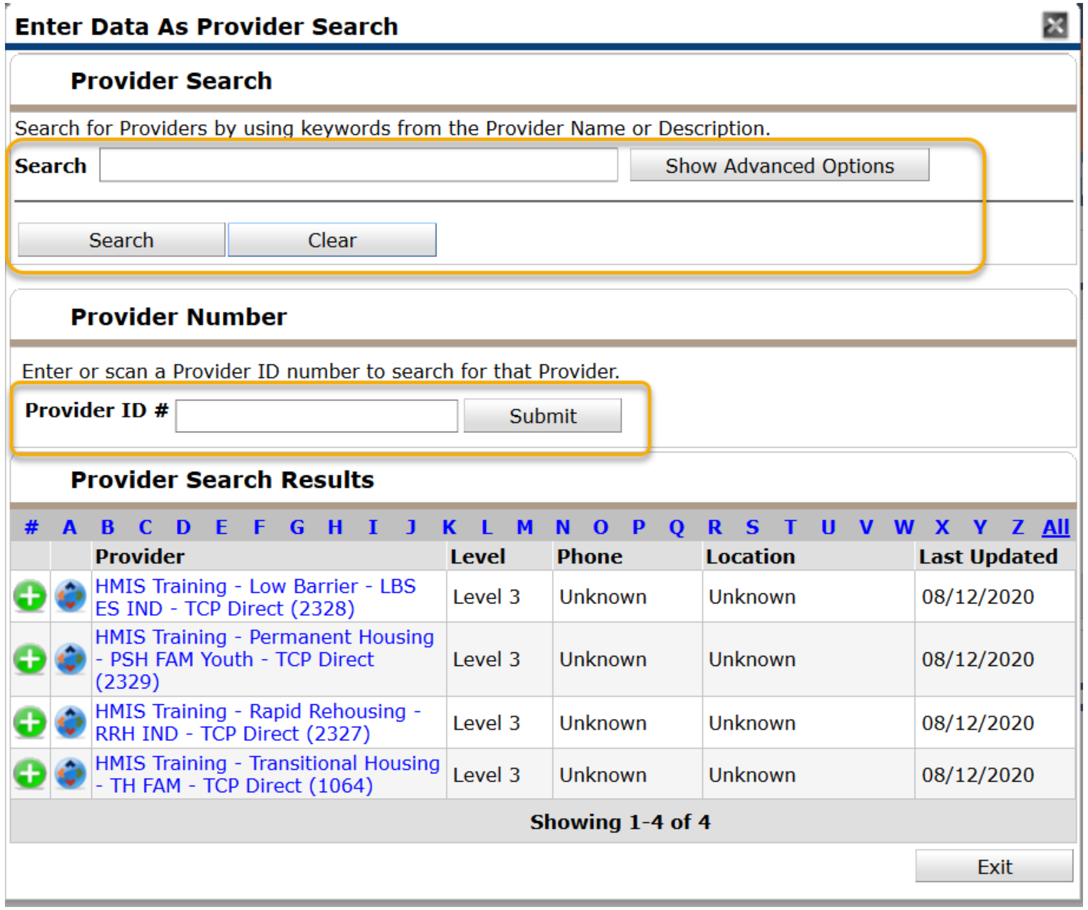
How to Enter Data As – Step 2



- 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

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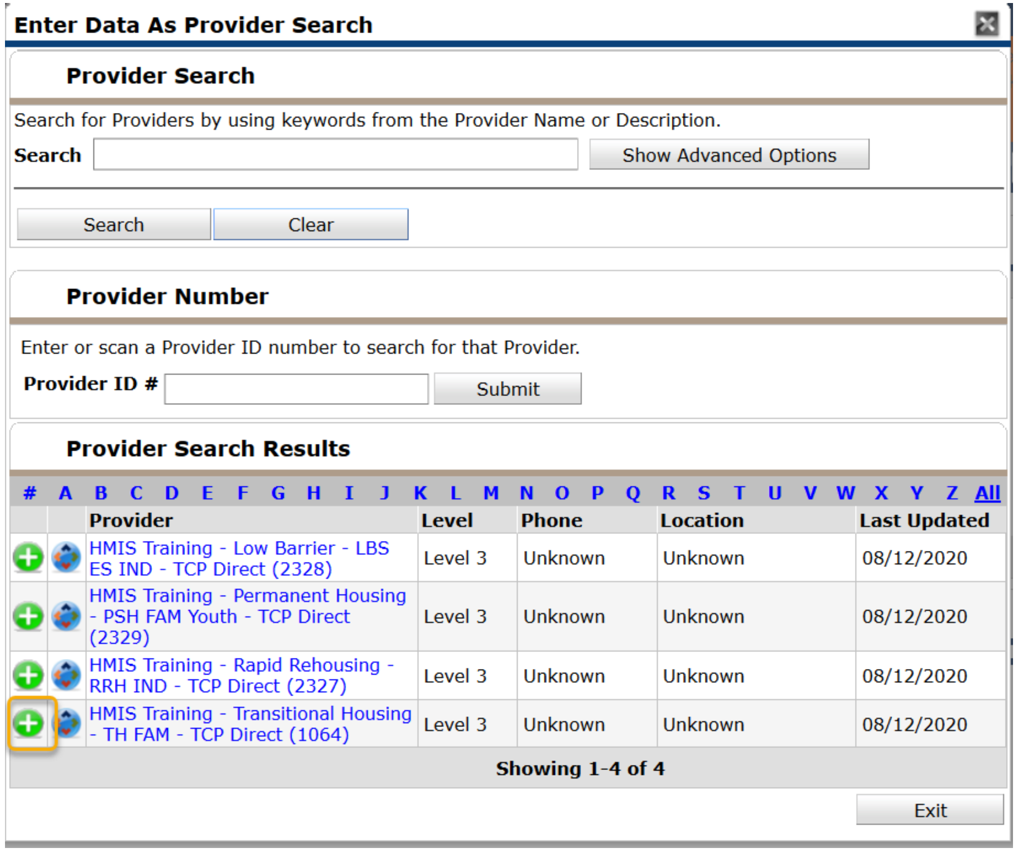
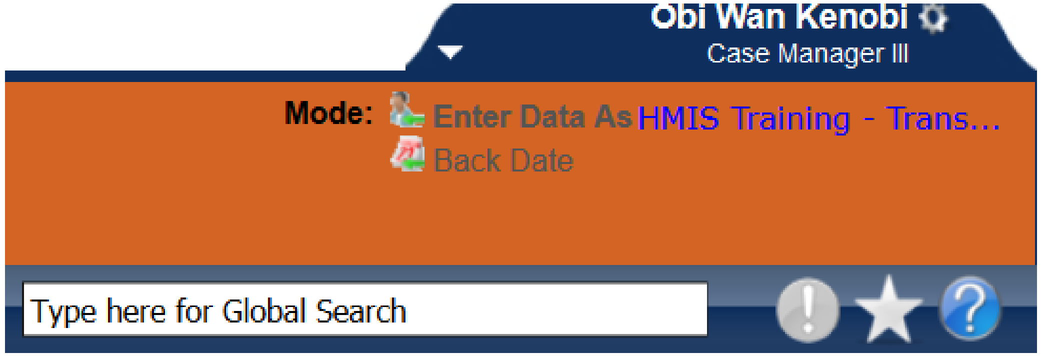
How to Enter Data As – Step 3

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



How to Enter Data As – Step 4



- 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).


Demo

Introduction to ShelterPoint

- ShelterPoint is used by Low Barrier Shelters in order to track shelter stays.
- ShelterPoint uses bed lists to organize clients who are served in the shelter.
- ShelterPoint is a separate module within ServicePoint.

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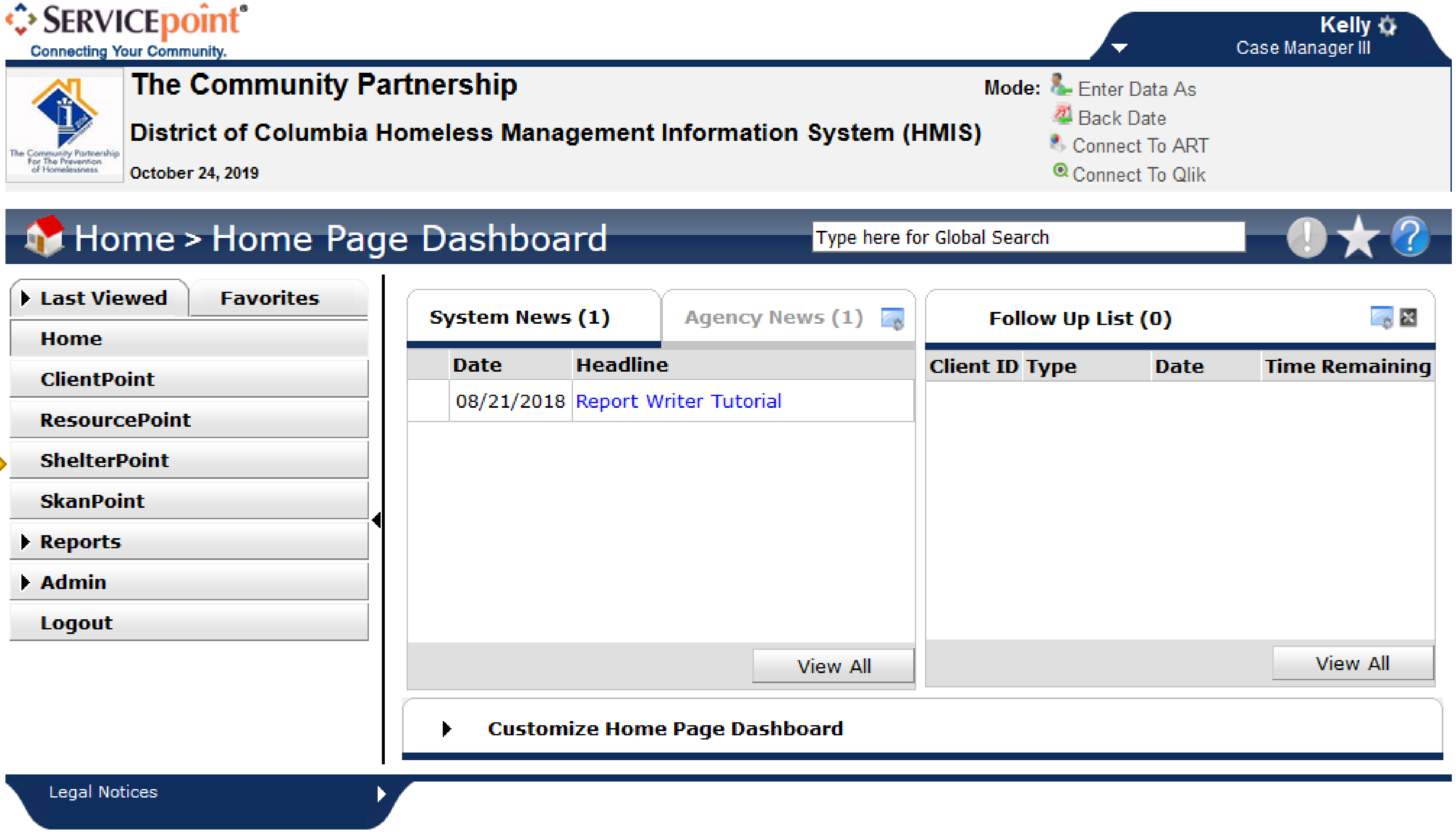
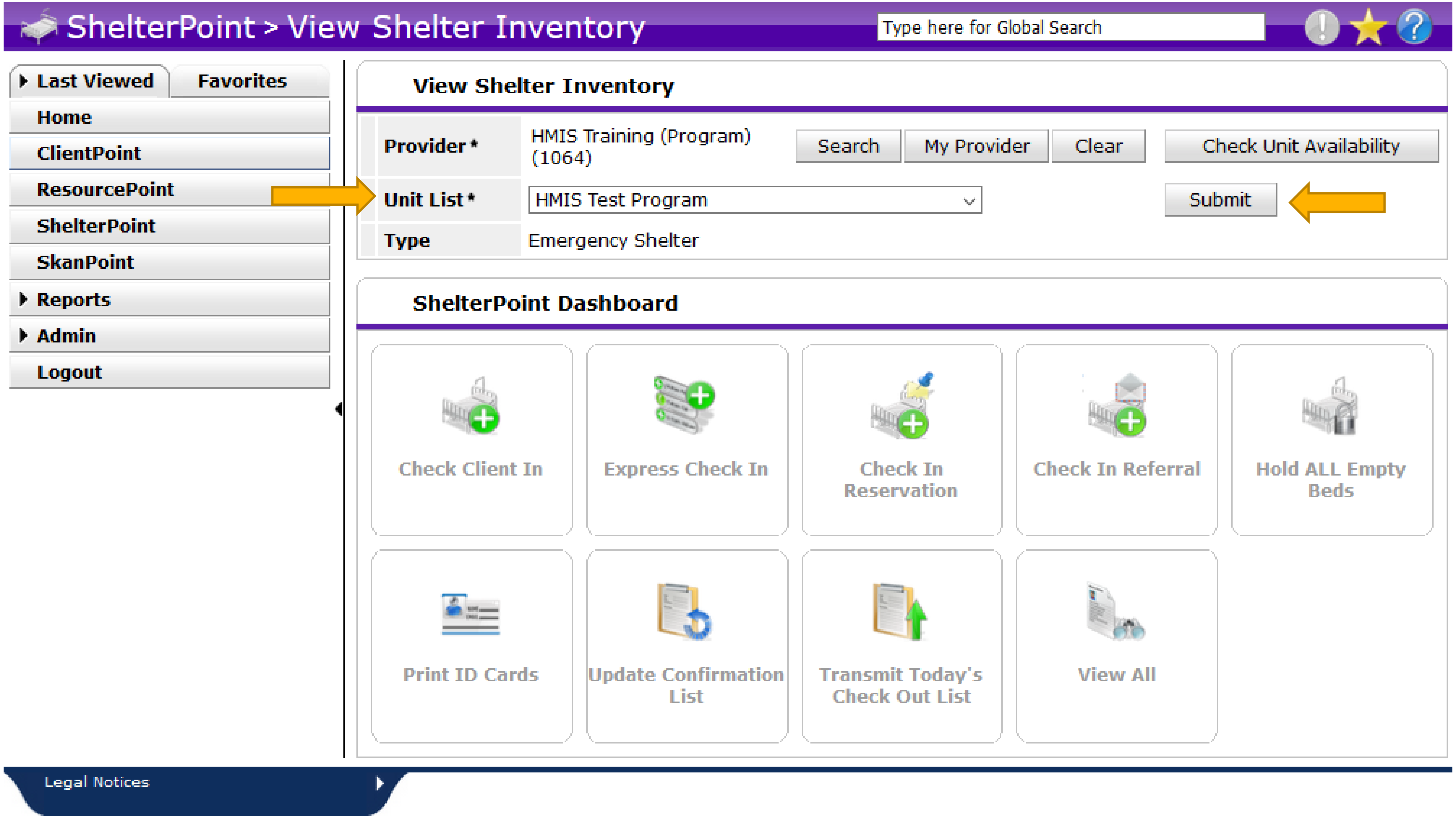
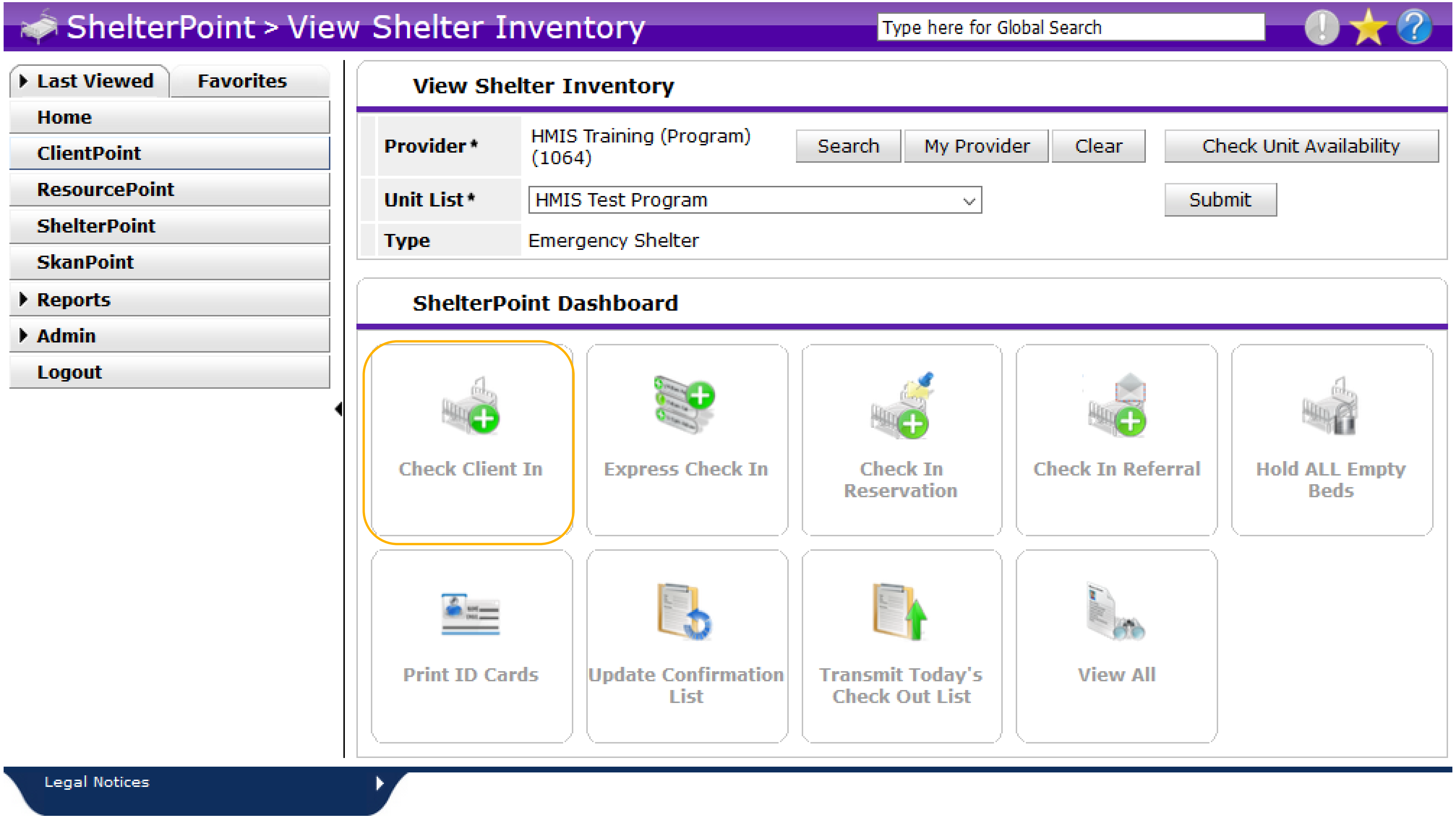



ShelterPoint > View Shelter Inventory
Type here for Global Search
Last Viewed
Favorites
Home
ClientPoint
ResourcePoint
ShelterPoint
SkanPoint
Reports
Admin
Logout
View Shelter Inventory
Provider *
HMIS Training (Program) (1064)
Search
My Provider
Clear
Check Unit Availability
Unit List *
HMIS Test Program
Submit
Type
Emergency Shelter
ShelterPoint Dashboard
Check Client In
Express Check In
Check In Reservation
Check In Referral
Hold ALL Empty Beds
Print ID Cards
Update Confirmation List
Transmit Today's Check Out List
View All
Legal Notices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Check Unit Availability
Unit List *
HMIS Test Program
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Check In Reservation
Check In Referral
Hold ALL Empty Beds
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Update Confirmation List
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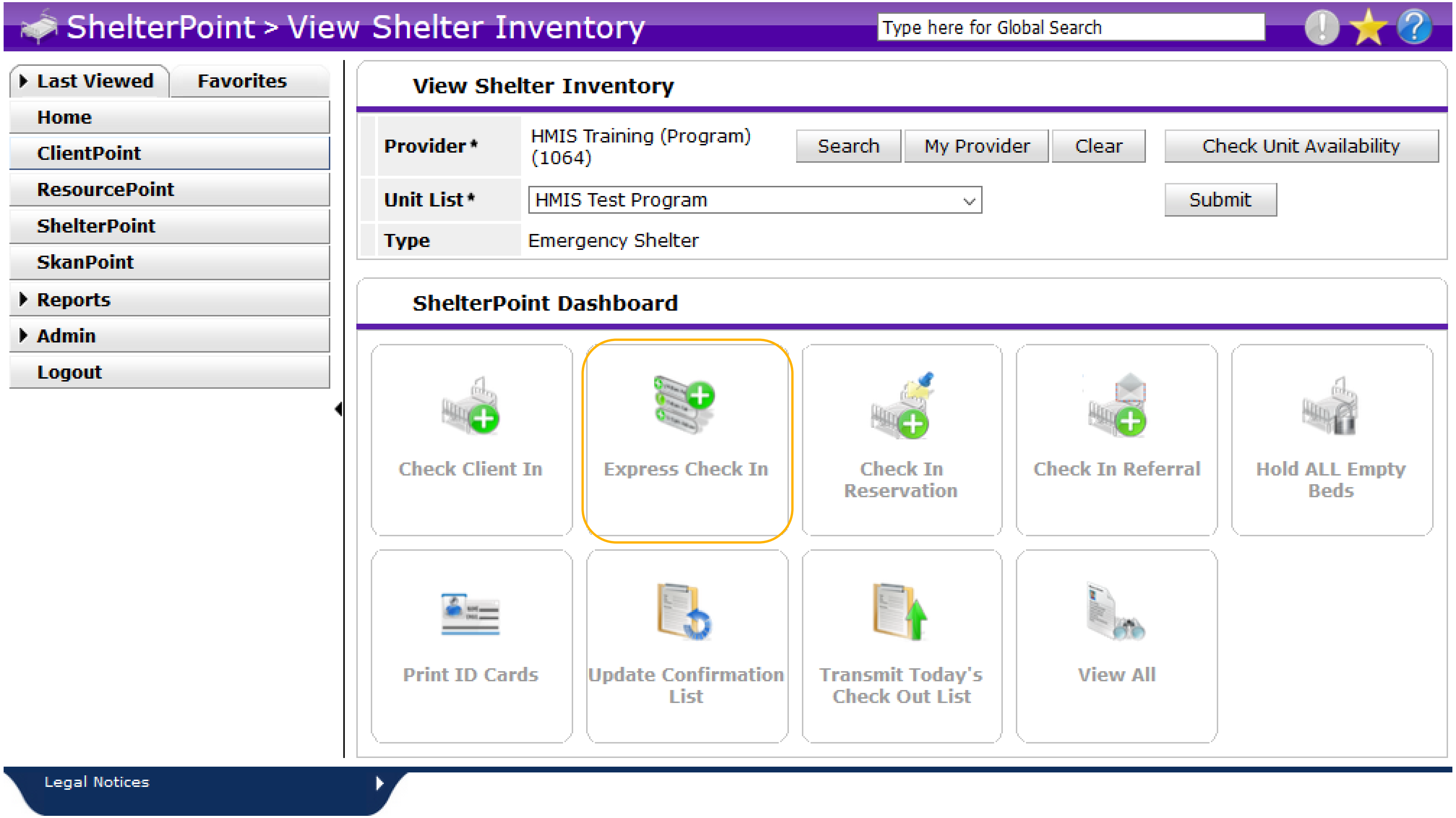
View All
Legal Notices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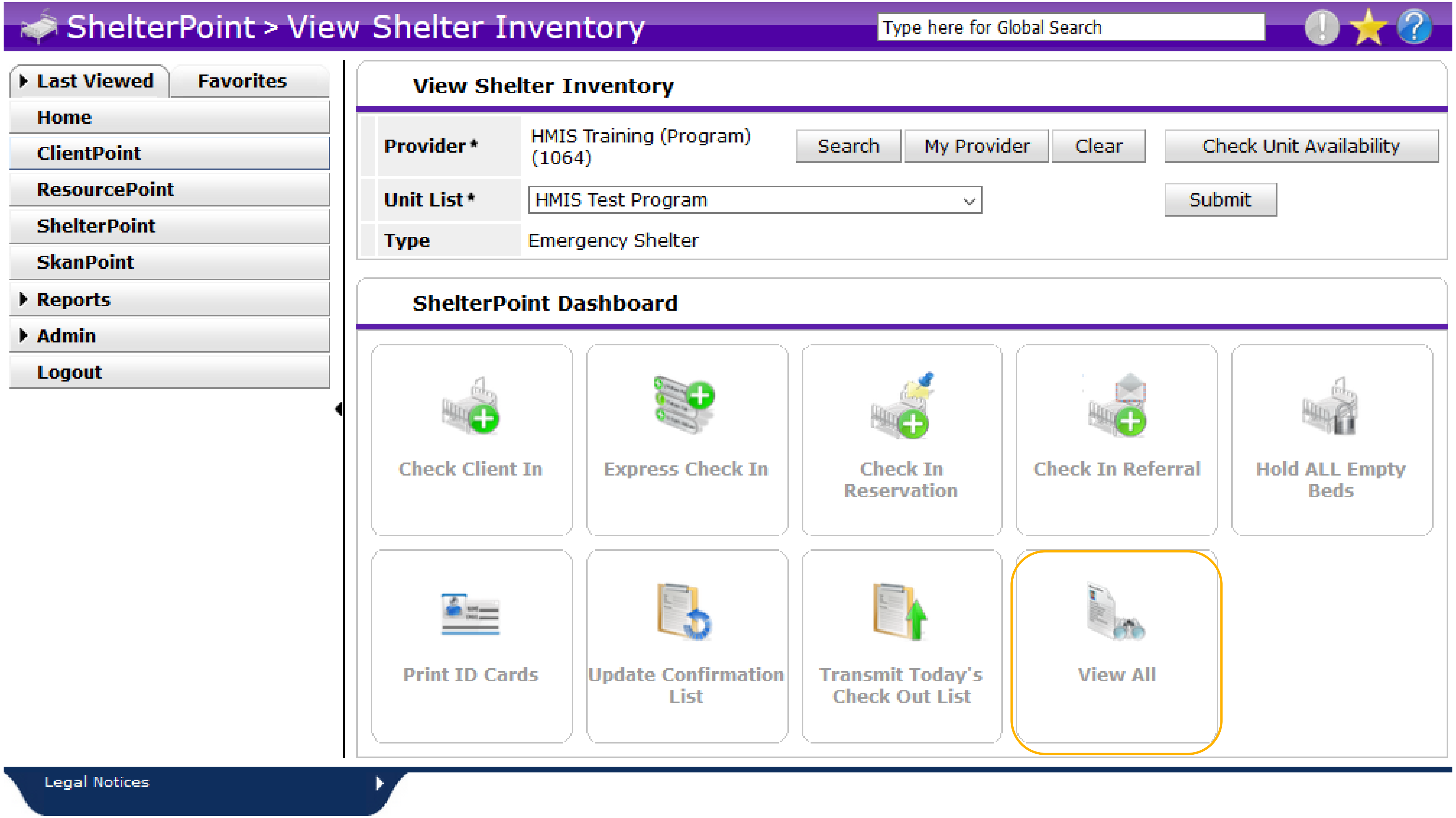
Search
My Provider
Clear
Check Unit Availability
Unit List *
HMIS Test Program
Submit
Type
Emergency Shelter
ShelterPoint Dashboard
Check Client In
Express Check In
Check In Reservation
Check In Referral
Hold ALL Empty Beds
Print ID Cards
Update Confirmation List
Transmit Today's Check Out List
View All
Legal Notices



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Checking a client into a bed

- Once you have selected the correct bedlist you can begin adding shelter stays for clients. You have the option of either adding shelter stays for 1 client at a time or adding shelter stays to multiple clients at the same time**.

**Note that if you are entering multiple clients at the same time they must all have the same entry date and time. This is usually only a good solution if there is historical information that needs to be entered.

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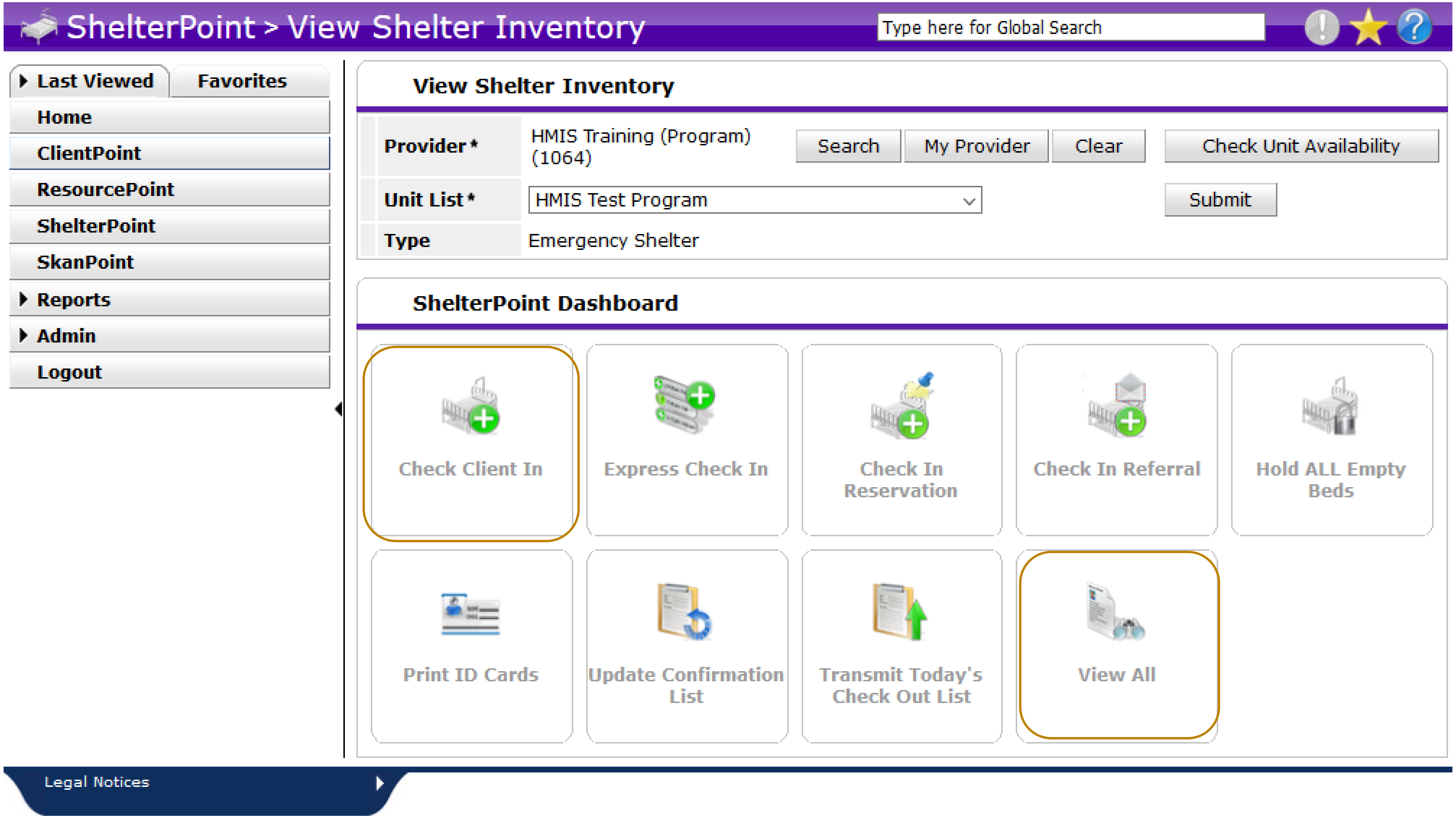

ShelterPoint > View Shelter Inventory

Type here for Global Search

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- Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkanPoint
- Reports
- Admin
- Logout

View Shelter Inventory

Provider*	HMIS Training (Program) (1064)
Unit List*	HMIS Test Program
Type	Emergency Shelter

Search | My Provider | Clear | Check Unit Availability | Submit

Shelter Inventory Information

Unit List - HMIS Test Program

Display All Beds **Sort By** Floor Ascending Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	1	1	Bed 001	Hold	EMPTY					
	1	1	Bed 002	Hold	EMPTY					
	1	1	Bed 003	Hold	EMPTY					
	1	1	Bed 004	Hold	EMPTY					
	1	1	Bed 005	Hold	EMPTY					
	1	1	Bed 006	Hold	EMPTY					
	1	1	Bed 007	Hold	EMPTY					
	1	1	Bed 008	Hold	EMPTY					
	1	1	Bed 009	Hold	EMPTY					
	1	1	Bed 010	Hold	EMPTY					
	1	1	Bed 011	Hold	EMPTY					
	1	1	Bed 012	Hold	EMPTY					
	1	1	Bed 013	Hold	EMPTY					
	1	1	Bed 014	Hold	EMPTY					
	1	1	Bed 015	Hold	EMPTY					
	1	1	Bed 016	Hold	EMPTY					
	1	1	Bed 017	Hold	EMPTY					
	1	1	Bed 018	Hold	EMPTY					
			Overflow (New)		EMPTY					

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

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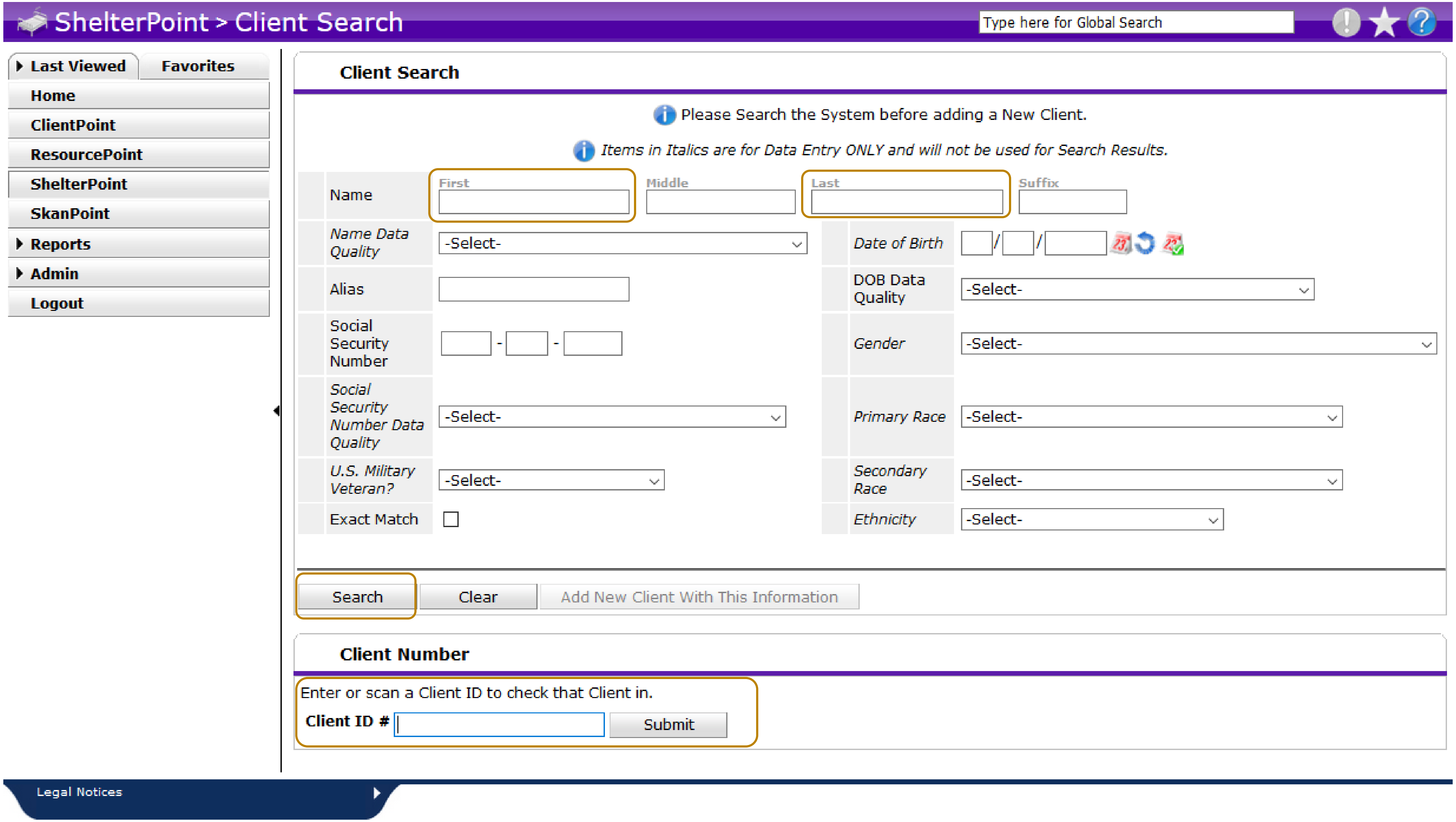

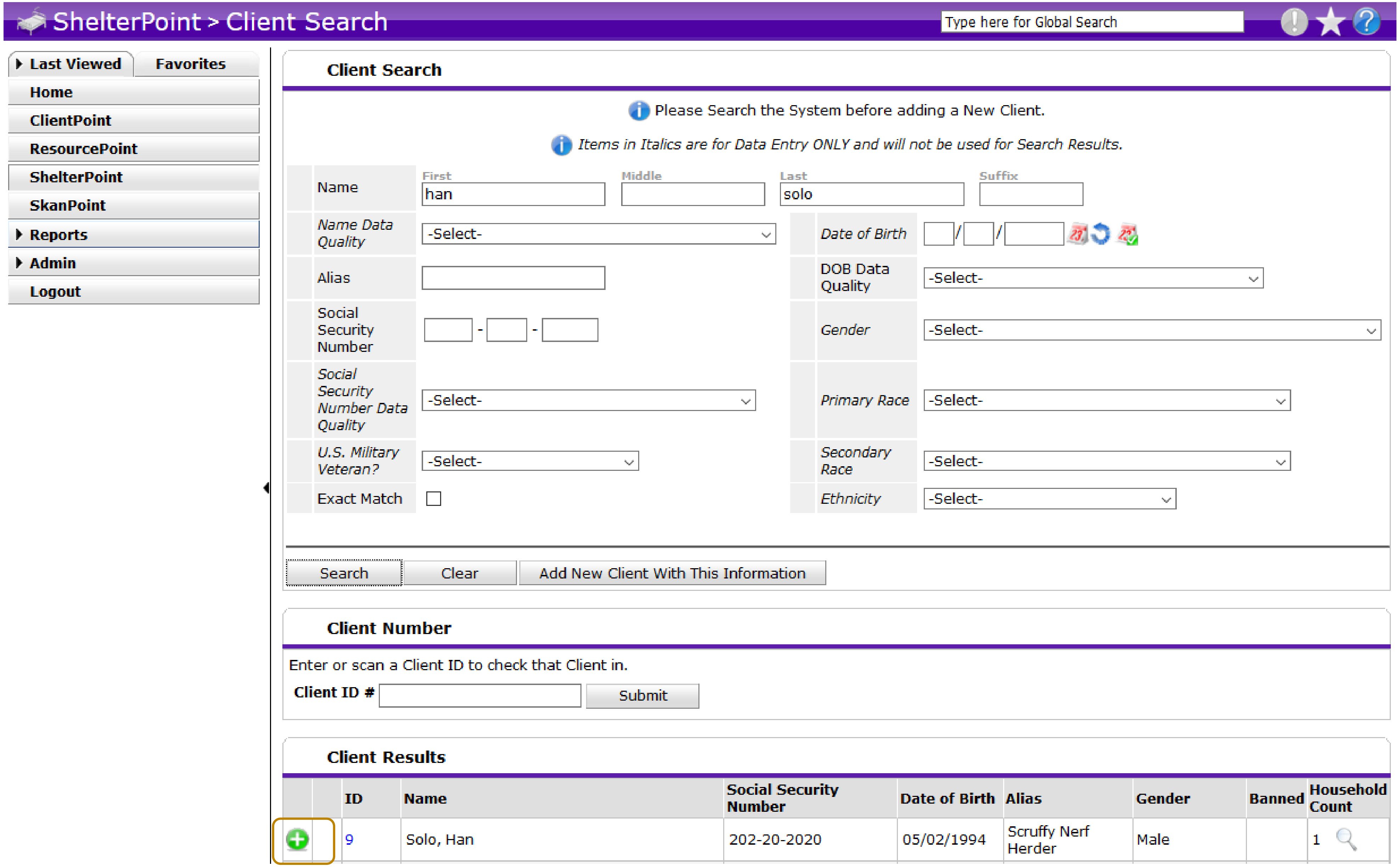
ShelterPoint > Client Search
Type here for Global Search
Last Viewed
Favorites
Home
ClientPoint
ResourcePoint
ShelterPoint
SkanPoint
Reports
Admin
Logout
Client Search
Please Search the System before adding a New Client.
Items in Italics are for Data Entry ONLY and will not be used for Search Results.
Name
First
han
Middle
Last
solo
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-
Search
Clear
Add New Client With This Information
Client Number
Enter or scan a Client ID to check that Client in.
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

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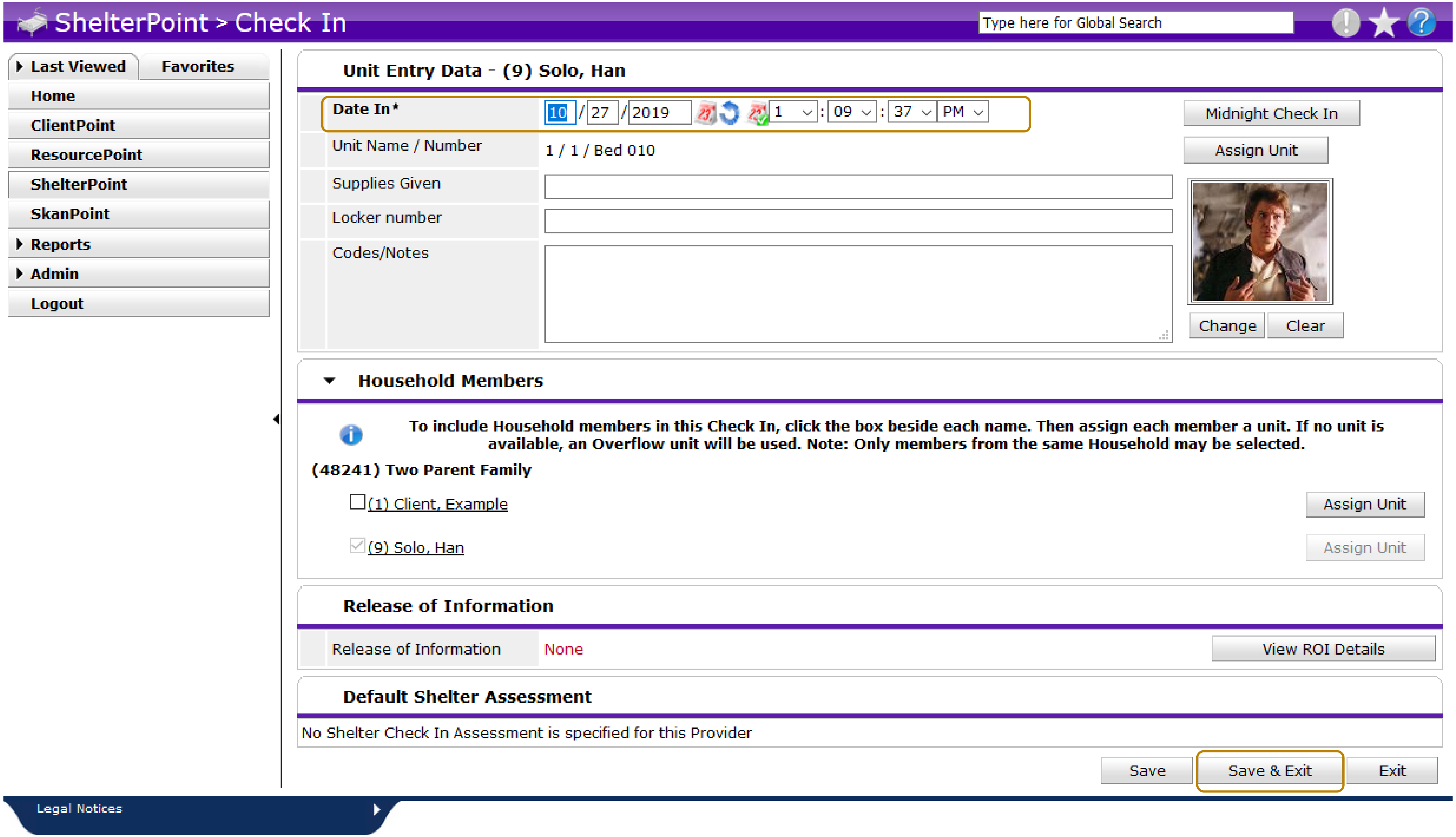

View Shelter Inventory

Provider *	HMIS Training (Program) (1064) [Search] [My Provider] [Clear] [Check Unit Availability]
Unit List *	HMIS Test Program [Submit]
Type	Emergency Shelter

Shelter Inventory Information

Unit List - HMIS Test Program

Display All Beds **Sort By** Floor Ascending [Sort]

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
		1	1	Bed 002	Hold	EMPTY					
		1	1	Bed 003	Hold	EMPTY					
		1	1	Bed 004	Hold	EMPTY					
		1	1	Bed 005	Hold	EMPTY					
		1	1	Bed 006	Hold	EMPTY					
		1	1	Bed 007	Hold	EMPTY					
		1	1	Bed 008	Hold	EMPTY					
		1	1	Bed 009	Hold	EMPTY					
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
		1	1	Bed 011	Hold	EMPTY					
		1	1	Bed 012	Hold	EMPTY					
		1	1	Bed 013	Hold	EMPTY					
		1	1	Bed 014	Hold	EMPTY					
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					

[Print Unit List] [Start Express Check In] [Hold ALL Empty Units] [Release ALL HELD Units]

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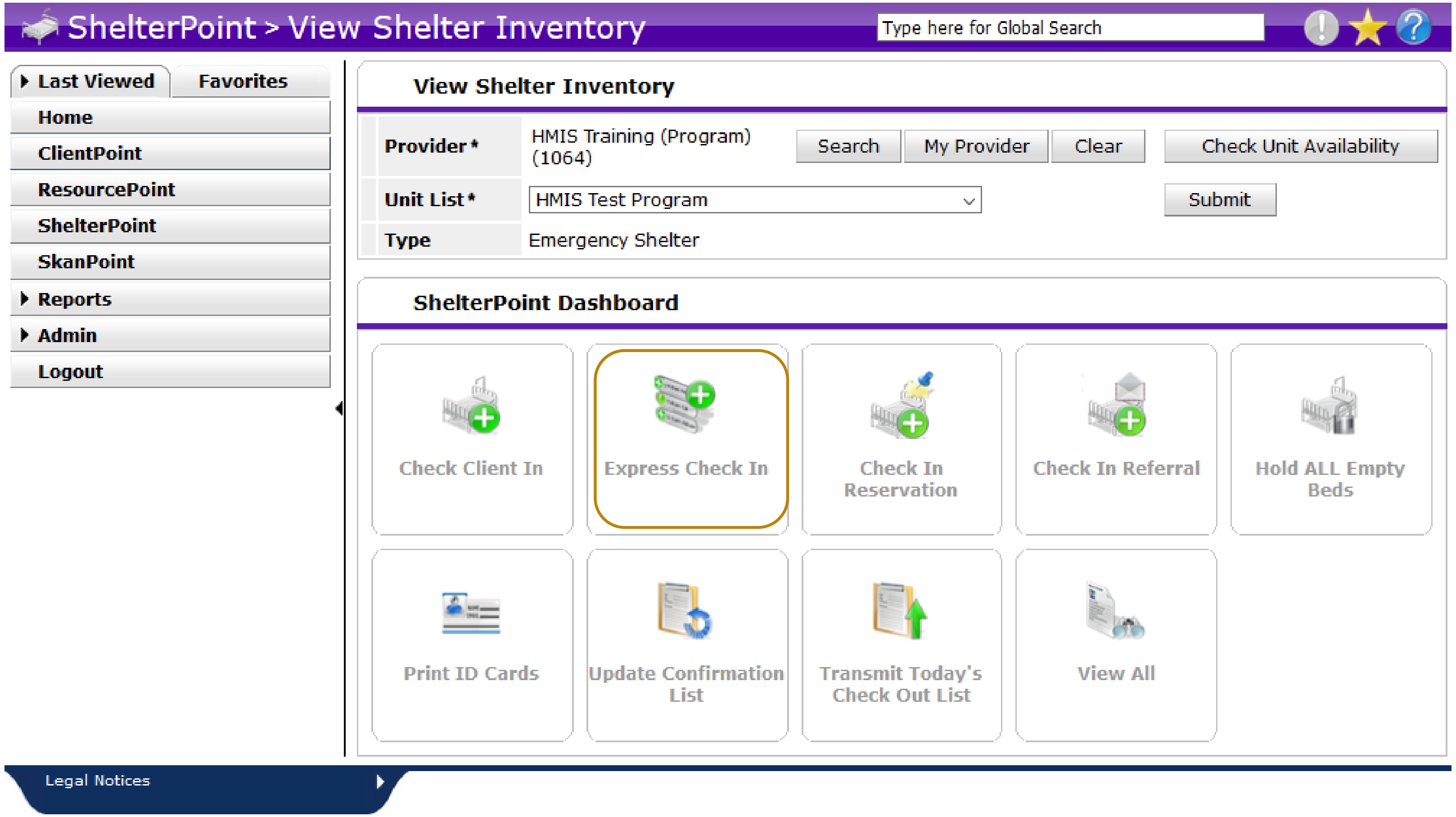
Demo

Checking in multiple clients



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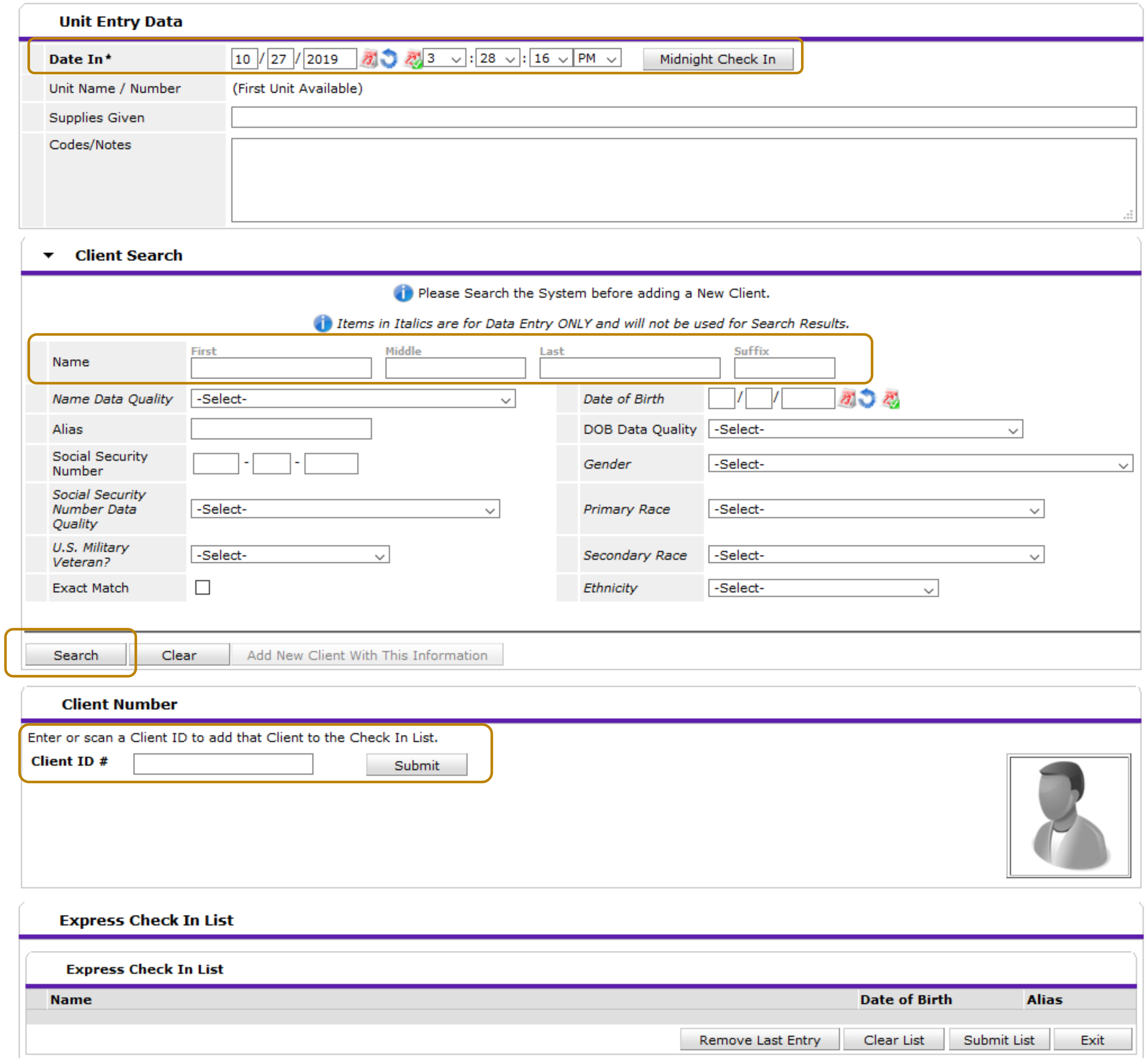
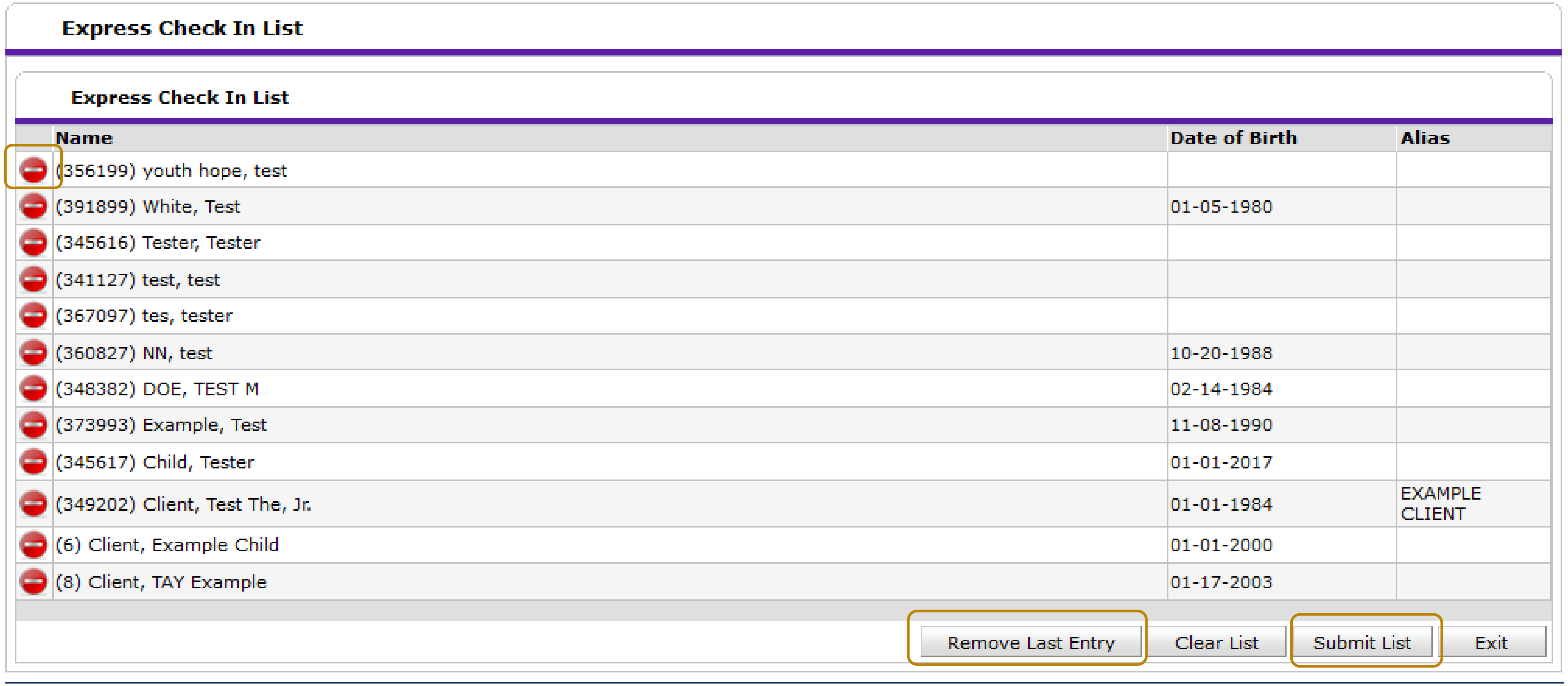
- The express check in functionality works nearly the same as the regular check in process aside from 3 major differences.
    1. You will need to set the date for all clients at the top before searching for/adding clients
    2. Each client you add will be added to a list that will be submitted once all clients have been selected by pressing the “Submit List” Button
    3. Clients added will be assigned to the first available bed in the bedlist specified



- You can remove clients from the list with the red remove circle or the “Remove Last Entry” button.
- When the list is complete, click “Submit List”



Express Check In List

Express Check In List

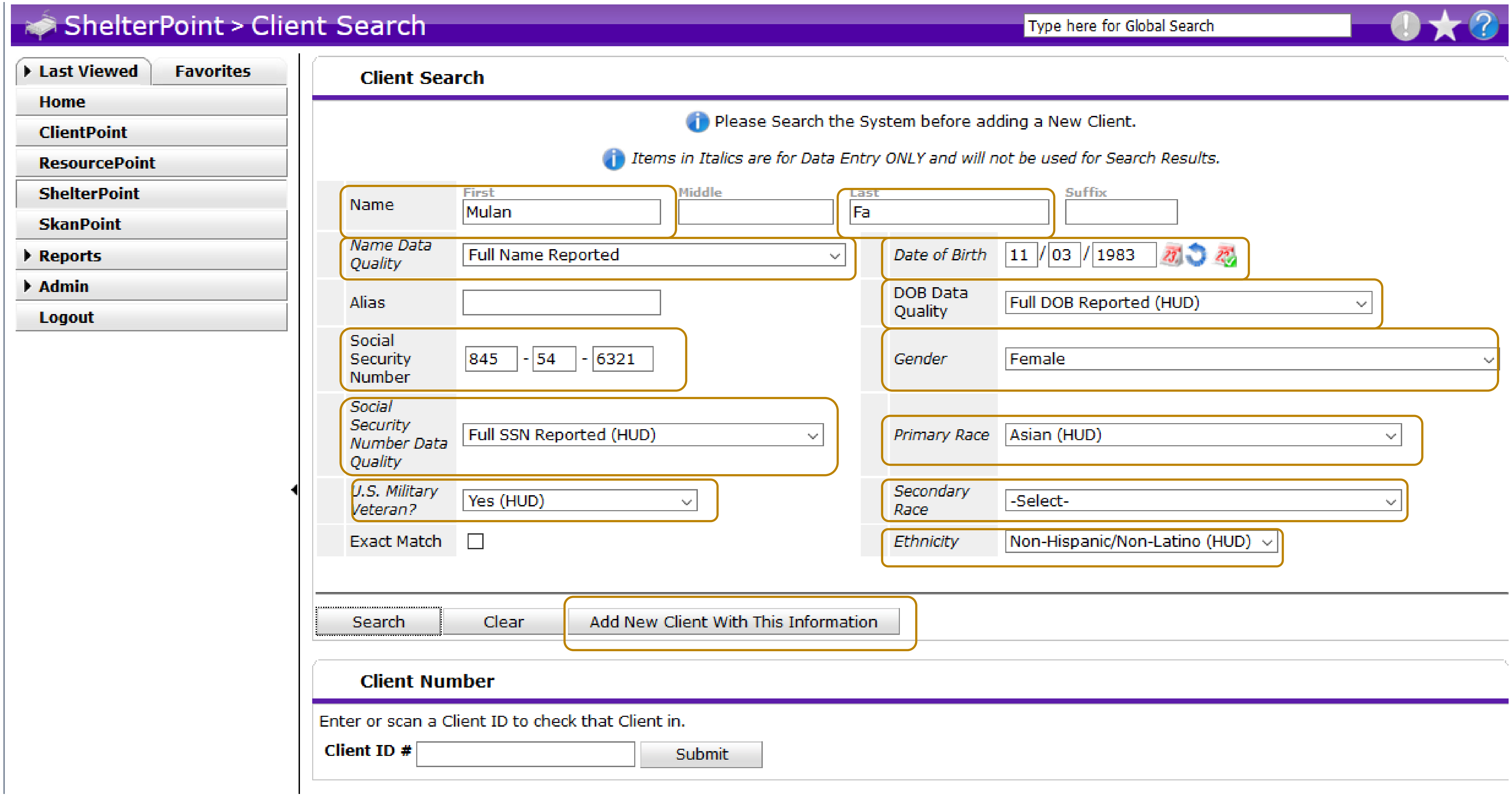
Name	Date of Birth	Alias
(356199) youth hope, test		
(391899) White, Test	01-05-1980	
(345616) Tester, Tester		
(341127) test, test		
(367097) tes, tester		
(360827) NN, test	10-20-1988	
(348382) DOE, TEST M	02-14-1984	
(373993) Example, Test	11-08-1990	
(345617) Child, Tester	01-01-2017	
(349202) Client, Test The, Jr.	01-01-1984	EXAMPLE CLIENT
(6) Client, Example Child	01-01-2000	
(8) Client, TAY Example	01-17-2003	

Remove Last Entry | Clear List | Submit List | Exit


Demo

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 can be done from the Search box in ShelterPoint, or ClientPoint.
- Once the client record has been created, you can add the record to a bed in ShelterPoint.



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Completing the Client Profile Information

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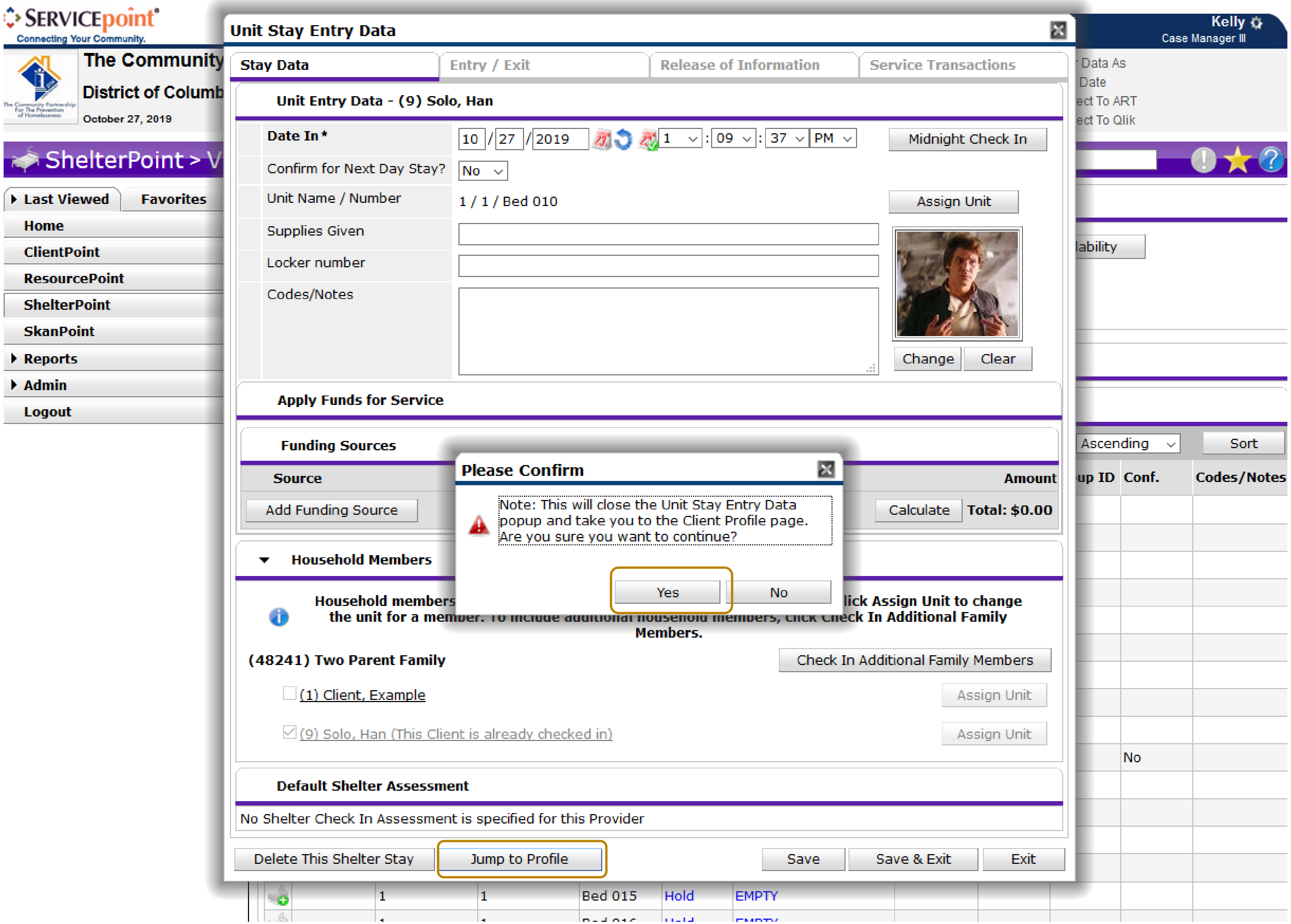
- Most of the data entry for Low Barrier Shelters, beyond documenting when a client stays in the shelter, is done in ClientPoint on the Client Profile page.

- There are two ways you can access the Client Profile page.
  1. Exit ShelterPoint and click ClientPoint. Then search for the client.
  2. Go into the client’s shelter stay and click “Jump to Profile”



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Client - (9) Solo, Han

Mass Visibility Update

(9) Solo, Han

Release of Information: None

-Switch to Another Household Member- | Submit

Client Information | Service Transactions

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

Client Record — Issue ID Card

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

Change | Clear

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)

Save | Save & Exit | Exit

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


Demo

Low Barrier Assessment

The Low-Barrier Assessment captures the universal data elements requested by the Federal Partners as well as income, non-cash benefits, health insurance, and disabilities that a client may have.

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

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

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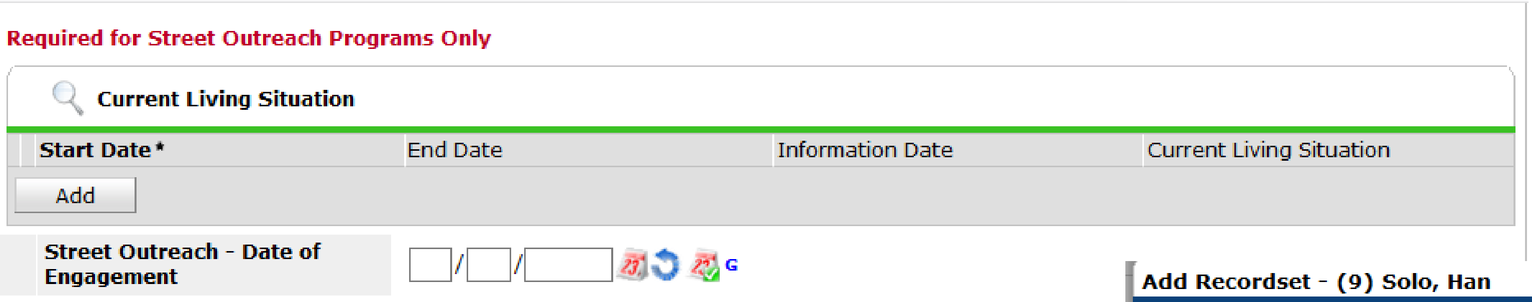

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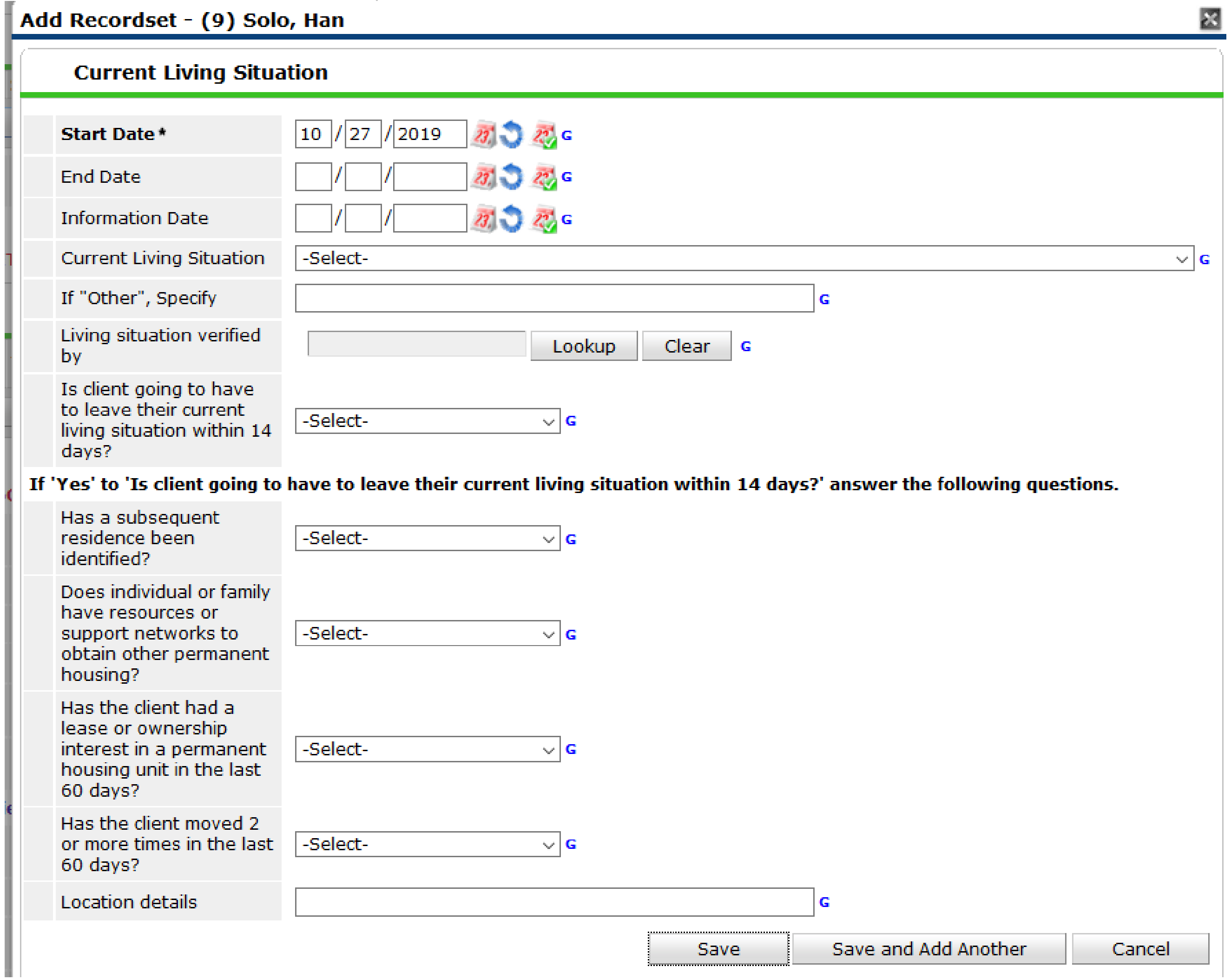
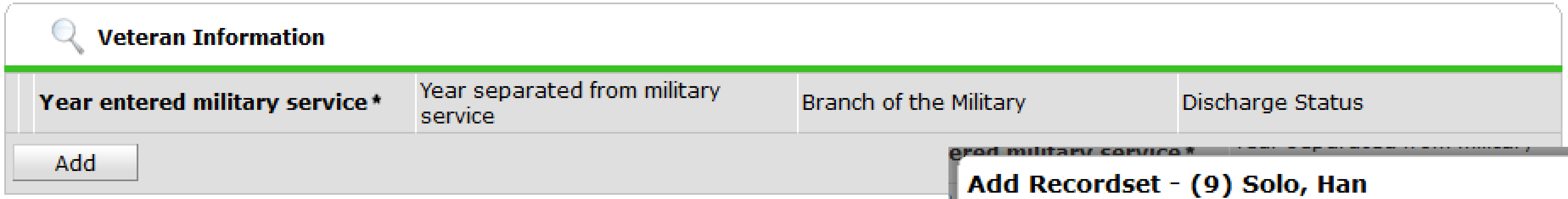
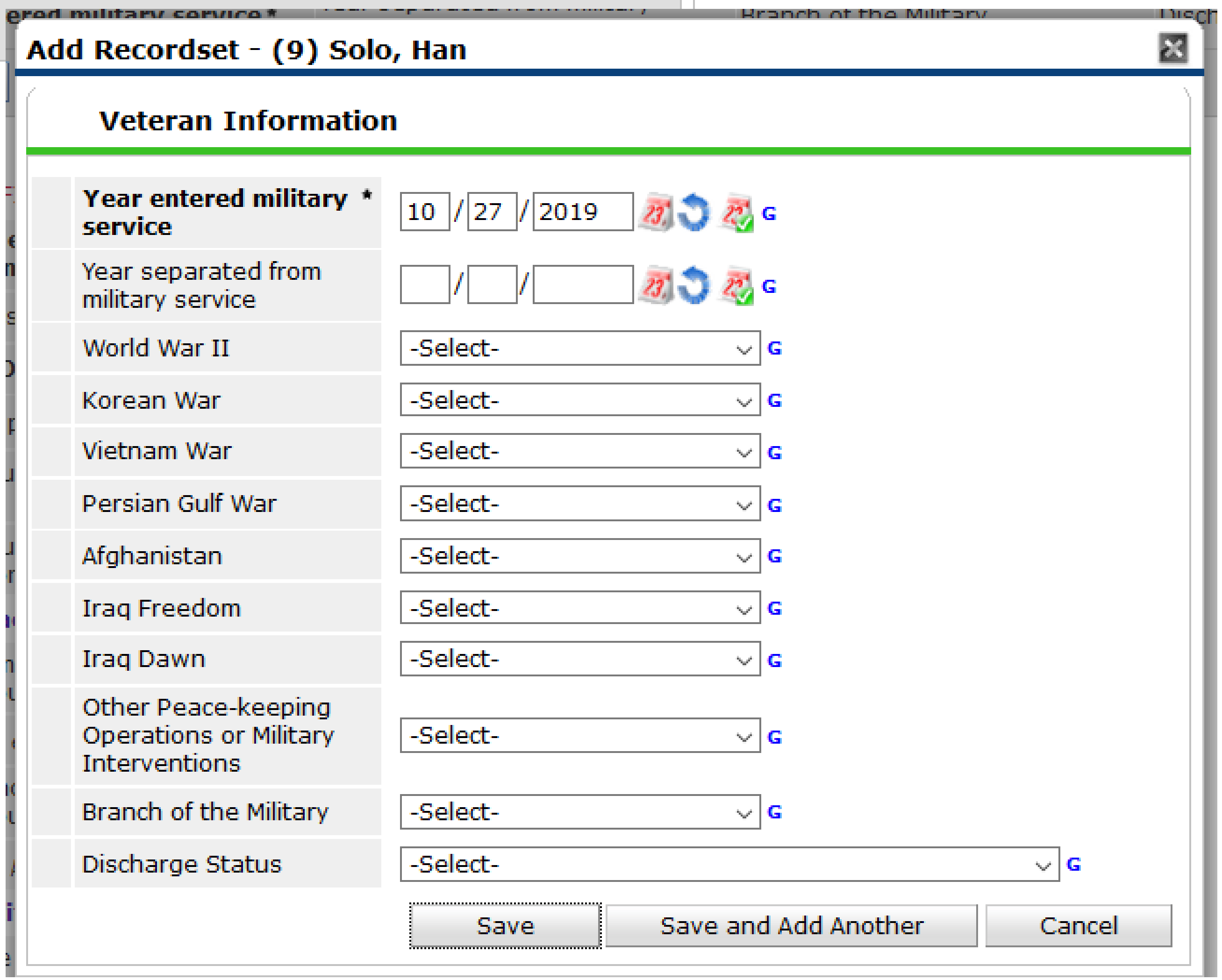
- The Current Living Situation (CLS) sub-assessment replaces the “Contact” sub-assessment from previous years.
- A CLS should be created each time a client has been directly contacted in a *meaningful* way.
- This should be recorded for **Heads of Household** for each occurrence.



VETERAN INFORMATION



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



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:	

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

- Domestic Violence Questions should be completed for Heads of Households and Adults.
  - Verification is not necessary unless required by your funder.
- For disabilities first record whether the client has a disabling condition (found in the Chronic Homelessness Determination) and then record which disabling condition the client has where applicable.

PROGRAM SPECIFIC DATA ELEMENTS

Domestic Violence Information

Do you have a history of domestic violence?	Yes (HUD)	G
If yes, when experience occurred	Within the past three months (HUD)	G
If yes, are you currently fleeing?	Yes (HUD)	G

Client Disability Information

Please Record Whether or Not the Client Has Any of the Following Disability Types:

Alcohol Abuse?	-Select-	G
Drug Abuse?	-Select-	G
Both Alcohol and Drug Abuse?	-Select-	G
Chronic Health Condition?	-Select-	G
Developmental Disability?	-Select-	G
Living With HIV/AIDS?	-Select-	G
Mental Health Problem?	-Select-	G
Physical Disability?	-Select-	G

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- As with disabilities, for income you will first record whether the client is receiving income and then record which source of income where applicable.
- There is also one additional question regarding which source is the primary source of income for clients with more than one income source.

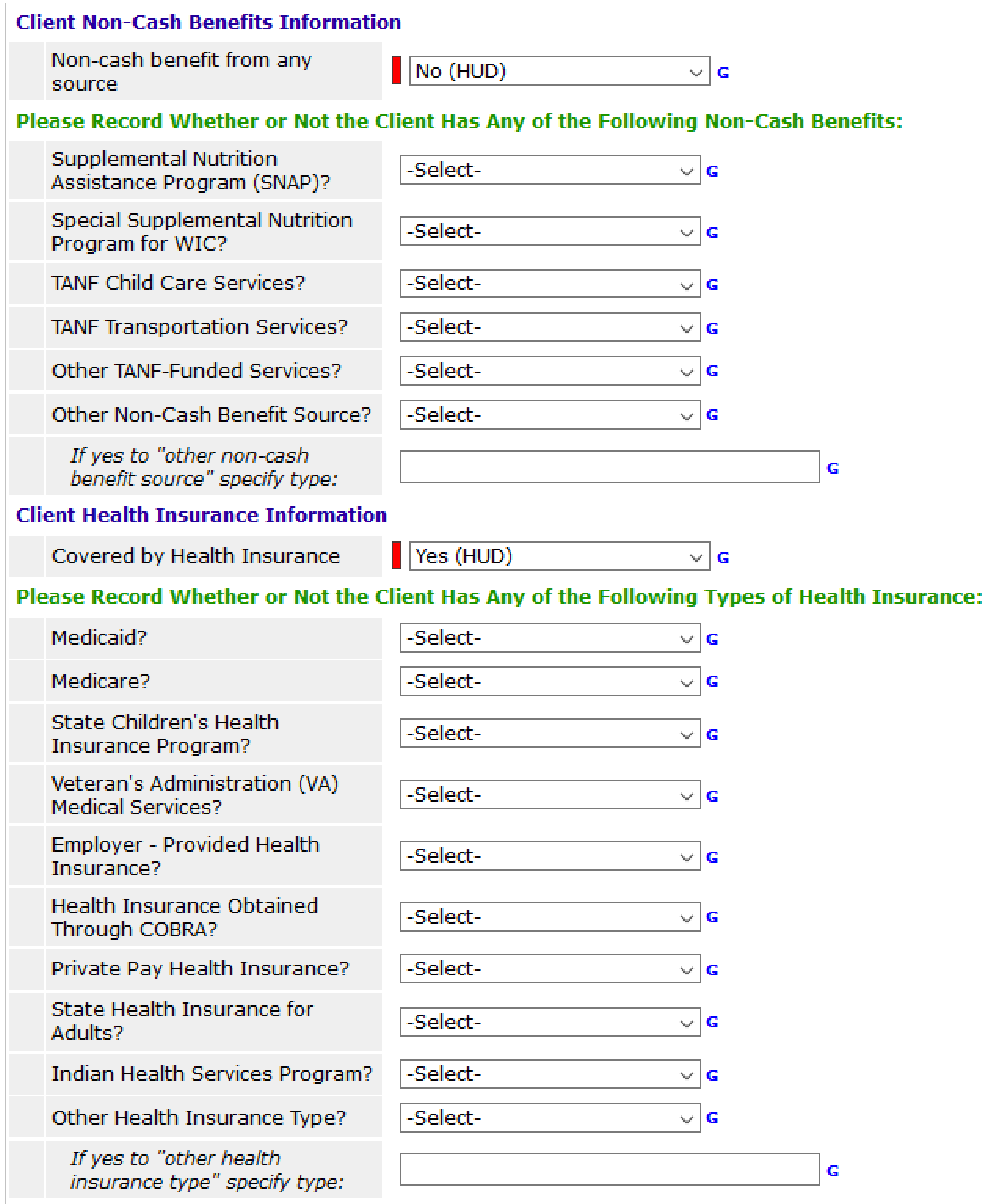
Client Income Information

Income from Any Source	Yes (HUD) G
Total Monthly Income	700 G

Please Record Whether or Not the Client Has Any of the Following Income Sources:

Alimony or Other Spousal Support?	-Select- G
Child Support?	-Select- G
Earned Income?	-Select- G
General Assistance (GA)?	-Select- G
Pension or retirement income from another job?	-Select- G
Private Disability Insurance?	-Select- G
Retirement Income From Social Security?	-Select- G
Social Security Disability Insurance (SSDI)?	-Select- G
Social Security Income (SSI)?	-Select- G
Temporary Assistance for Needy Families (TANF)?	-Select- G
Unemployment Insurance?	-Select- G
VA Non-Service Connected Disability Pension?	-Select- G
VA Service Connected Disability Compensation	-Select- G
Other Income Source?	-Select- G
If yes to "other income source" specify type:	G
Primary Income Source	-Select- G

- Non-Cash Benefits and Health Insurance are completed in the same way as disabilities in that you record whether the client is receiving any benefit and then record which benefit where applicable.



Client Non-Cash Benefits Information

Non-cash benefit from any source	No (HUD)

Please Record Whether or Not the Client Has Any of the Following Non-Cash Benefits:

Supplemental Nutrition Assistance Program (SNAP)?	-Select-
Special Supplemental Nutrition Program for WIC?	-Select-
TANF Child Care Services?	-Select-
TANF Transportation Services?	-Select-
Other TANF-Funded Services?	-Select-
Other Non-Cash Benefit Source?	-Select-
If yes to "other non-cash benefit source" specify type:	

Client Health Insurance Information

Covered by Health Insurance	Yes (HUD)

Please Record Whether or Not the Client Has Any of the Following Types of Health Insurance:

Medicaid?	-Select-
Medicare?	-Select-
State Children's Health Insurance Program?	-Select-
Veteran's Administration (VA) Medical Services?	-Select-
Employer - Provided Health Insurance?	-Select-
Health Insurance Obtained Through COBRA?	-Select-
Private Pay Health Insurance?	-Select-
State Health Insurance for Adults?	-Select-
Indian Health Services Program?	-Select-
Other Health Insurance Type?	-Select-
If yes to "other health insurance type" specify type:	

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Remember to Click Save & Exit

Client Notes

		Provider	Note Date	Note Preview	Full Note
		District of Columbia Homeless Management Information System (HMIS)	01/09/2019	Sarah's Notes =Count(if(Date([Entry D...	
		District of Columbia Homeless Management Information System (HMIS)	01/09/2018	David's notes	

Add New Client Note | Print | **Showing 1-2 of 2**

File Attachments

			Date Added	Name	Description	Type	Provider	Added From	
			01/28/2019	Map.docx	birth certificate	docx	zz - Catholic Charities Shelters (Agency)(closed 2/26/19)	Client Profile	
			08/26/2015	Client Profile Photo.jpg	Client Photo	jpg	District of Columbia Homeless Management Information System (HMIS)	Client Profile	

Add New File Attachment | **Showing 1-2 of 2**

Incidents

	Start Date	End Date	Incident	Incident Code	Provider	Ban	Site	Staff

Add New Incident | **No matches.**

Save | Save & Exit | Exit


Demo

Case Contacts

- DHS requires documentation of services, case plans, assessments, and attempts to engage at Low Barrier sites (does not include Severe Weather only locations)
- Clients with long lengths of stay who are not connected to a housing resource should be targeted for services

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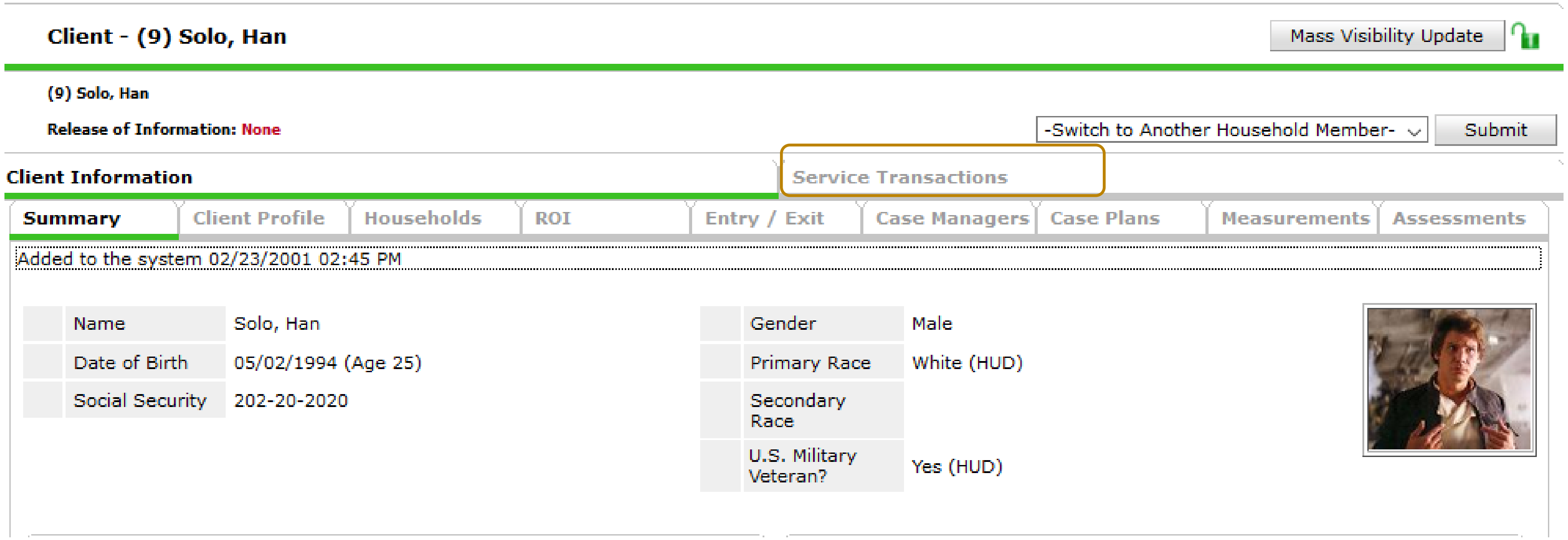
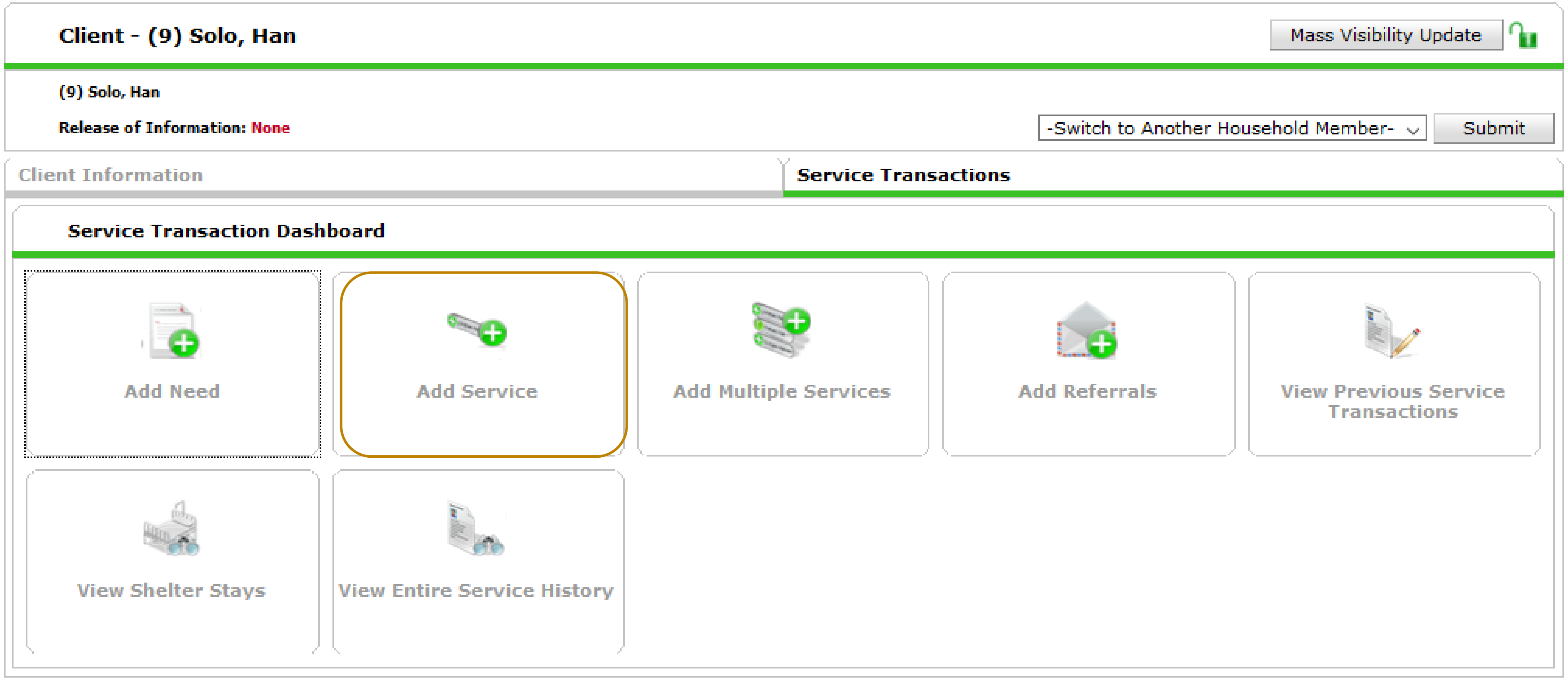
Documenting Services in the HMIS

Step One: Go the **Service Transactions** tab on the client profile screen:



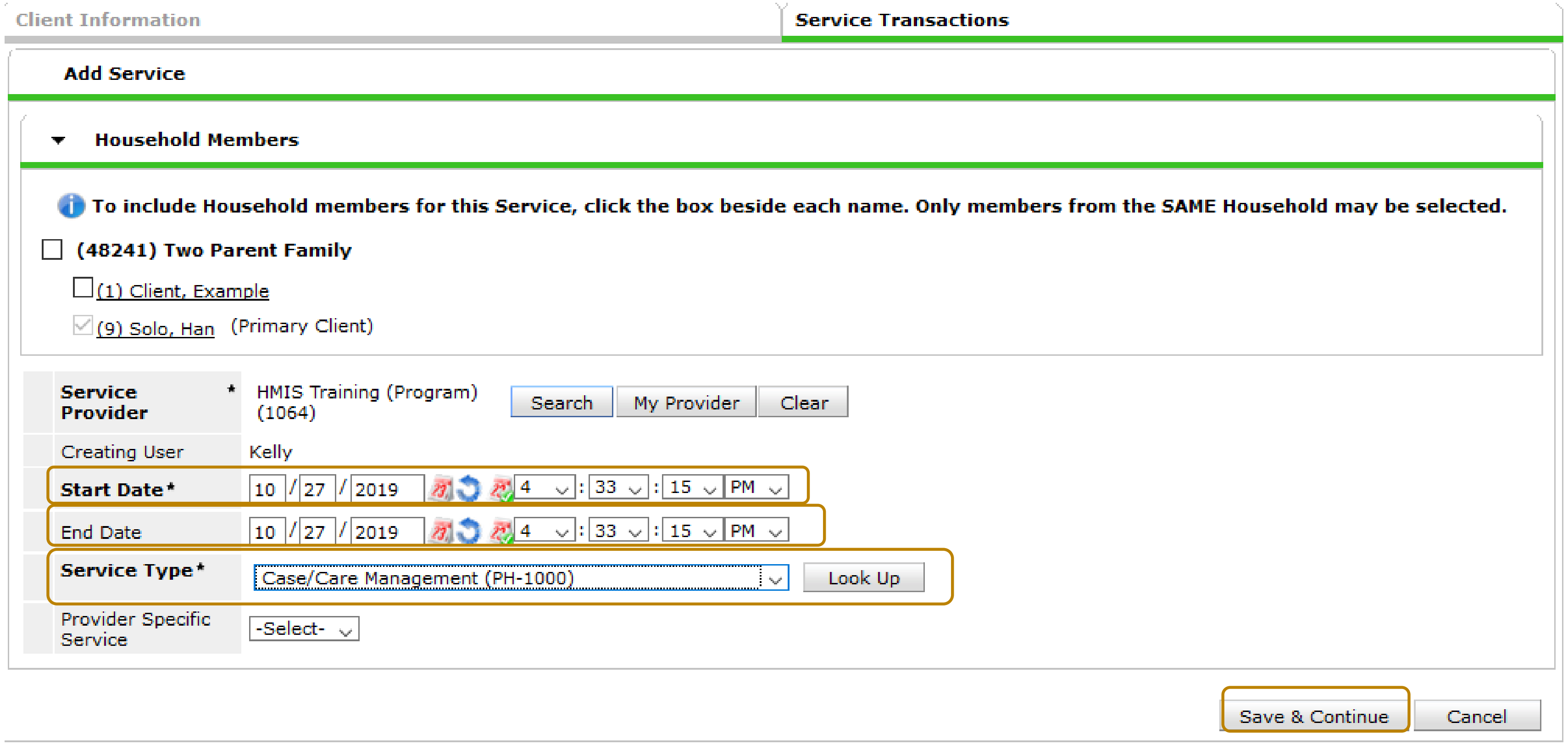
This will take you to the **Service Transaction Dashboard**.

Step Two: Click <u>Add Service</u>:



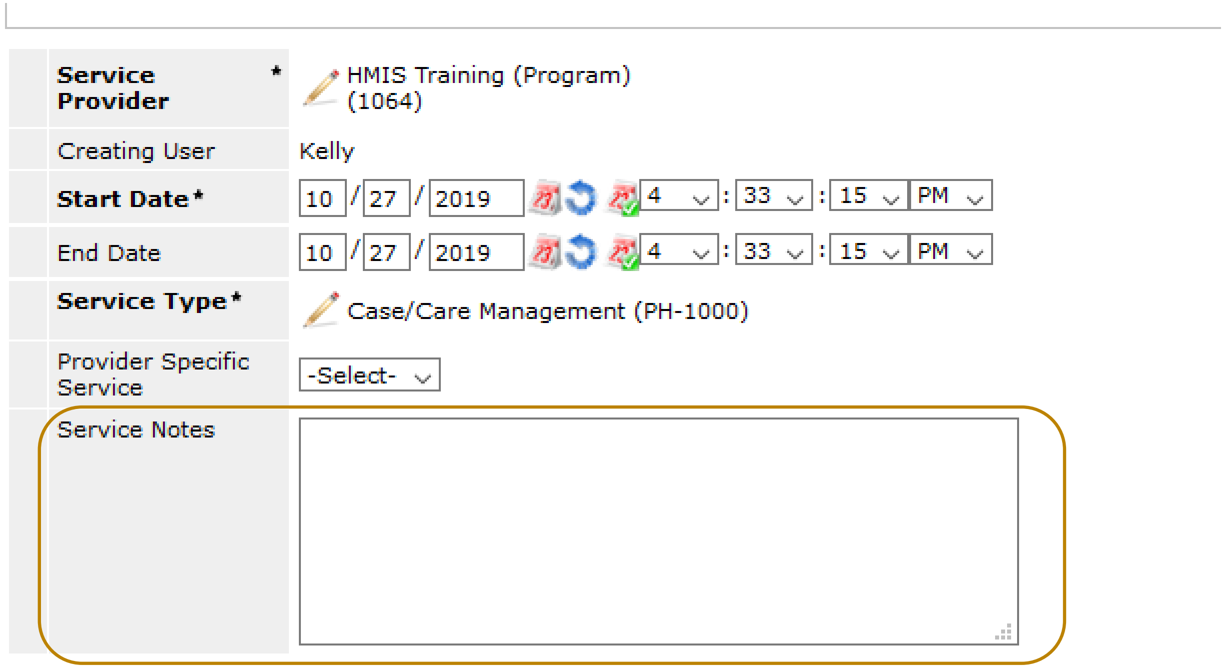
Step Three: Complete all required fields

When done, click Save & Continue



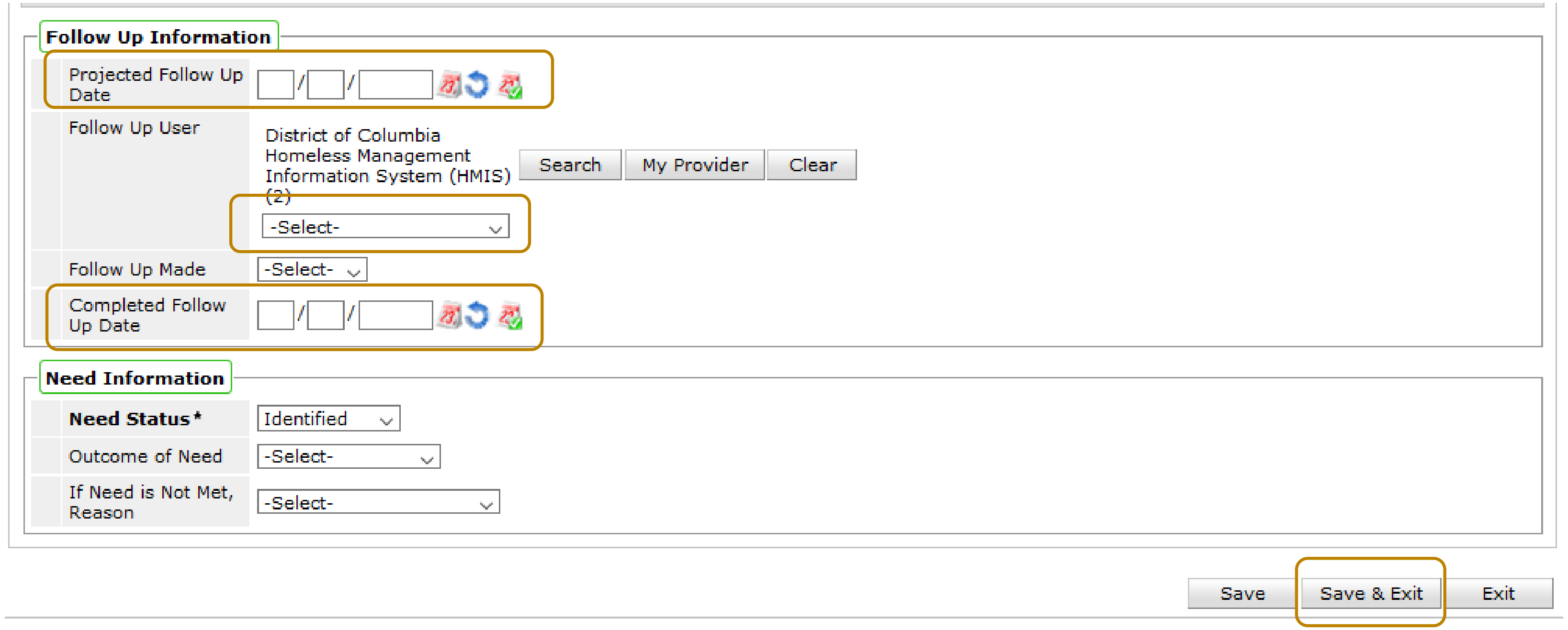
Step Four: Add Services Notes:

Provide a brief summary of the service provided in the Service Notes section.



Step Five: Follow Up and Need Information

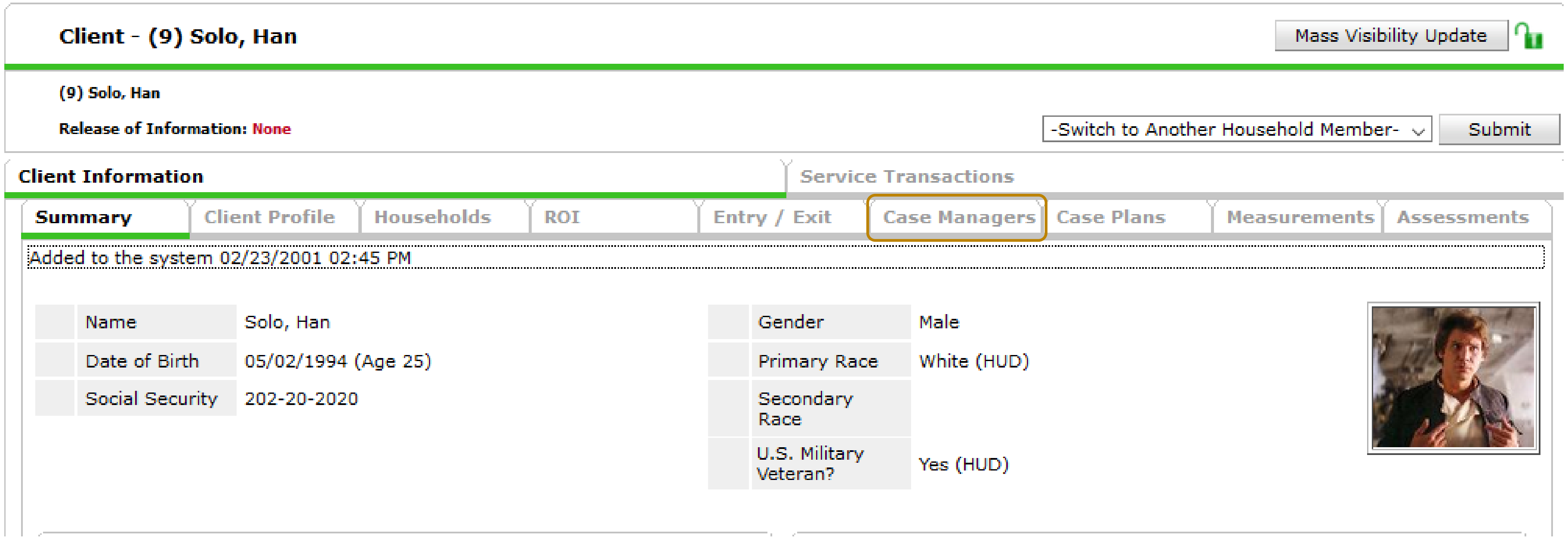
Similar to goals and action steps, Services have fields that allow case managers to indicate the date they plan to follow up with a client (**Projected Follow Up Date**), the staff person who will be following up (**Follow Up User**), and the date the follow up was actually made (**Completed Follow Up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




Demo

Adding a Case Manager

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



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

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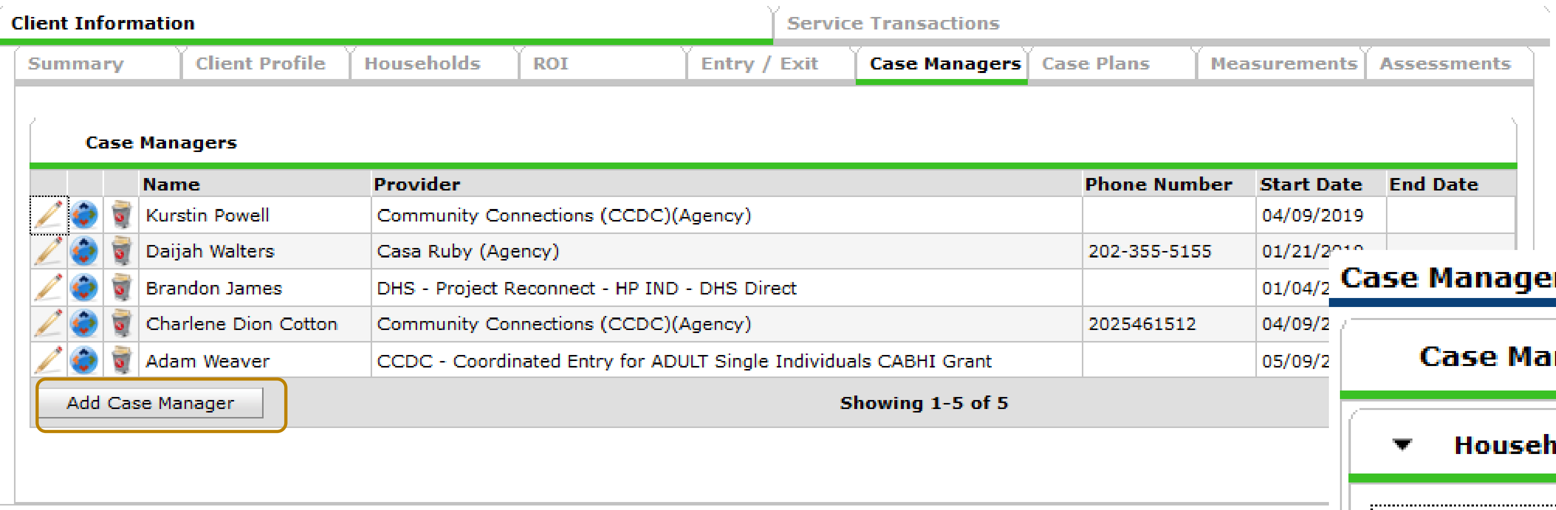
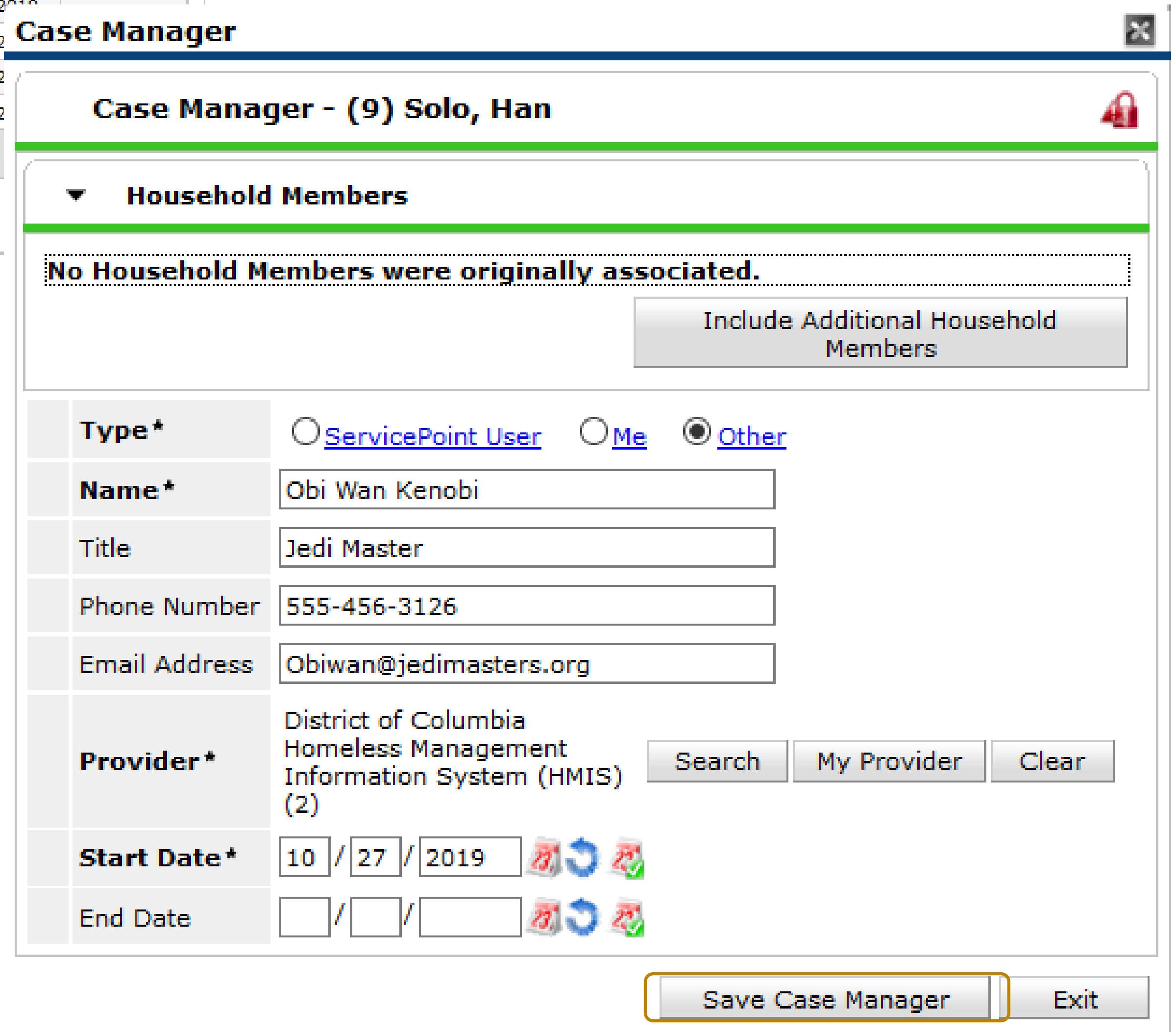




- Choose whether the Case Manager is a ServicePoint User, Yourself, or someone else.
- Complete the contact information
- Click Save Case Manager

Case Manager FAQs

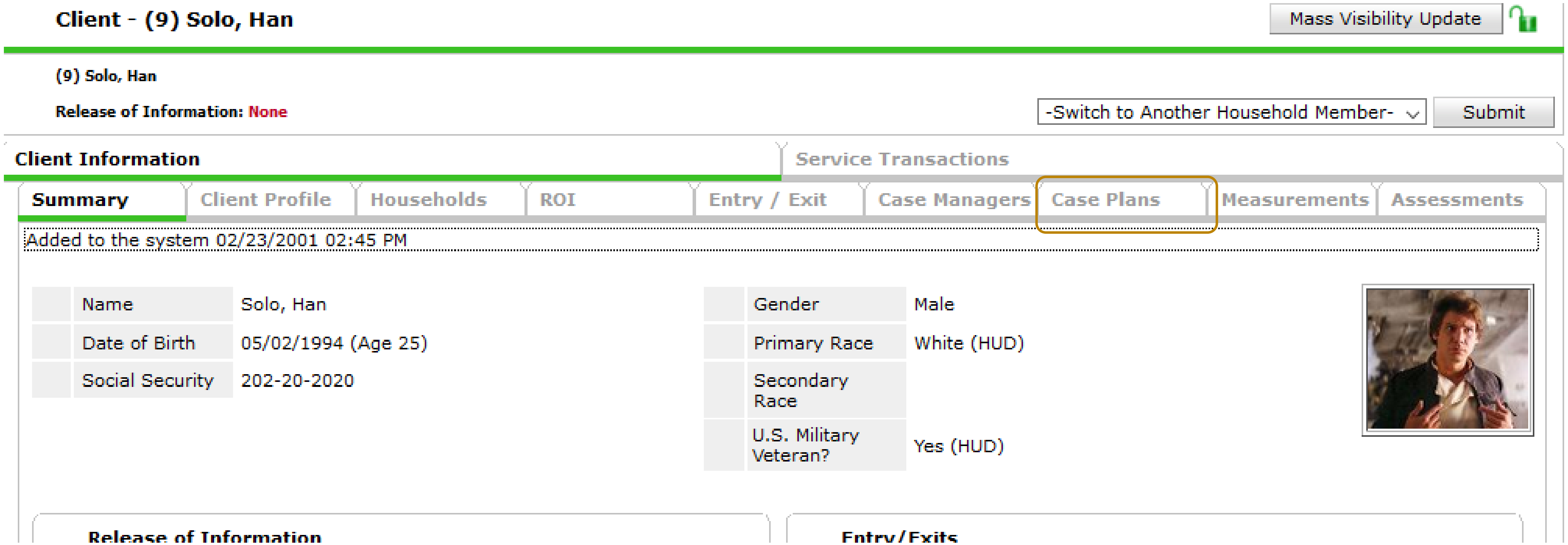
Can I add more than one case manager to a client's case manager tab?

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:



Step Two: On the Goals Screen click __Add Goal__:

Client Information | Service Transactions

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

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		

Add Goal | **Showing 1-10 of 20** | First | Previous | Next | Last

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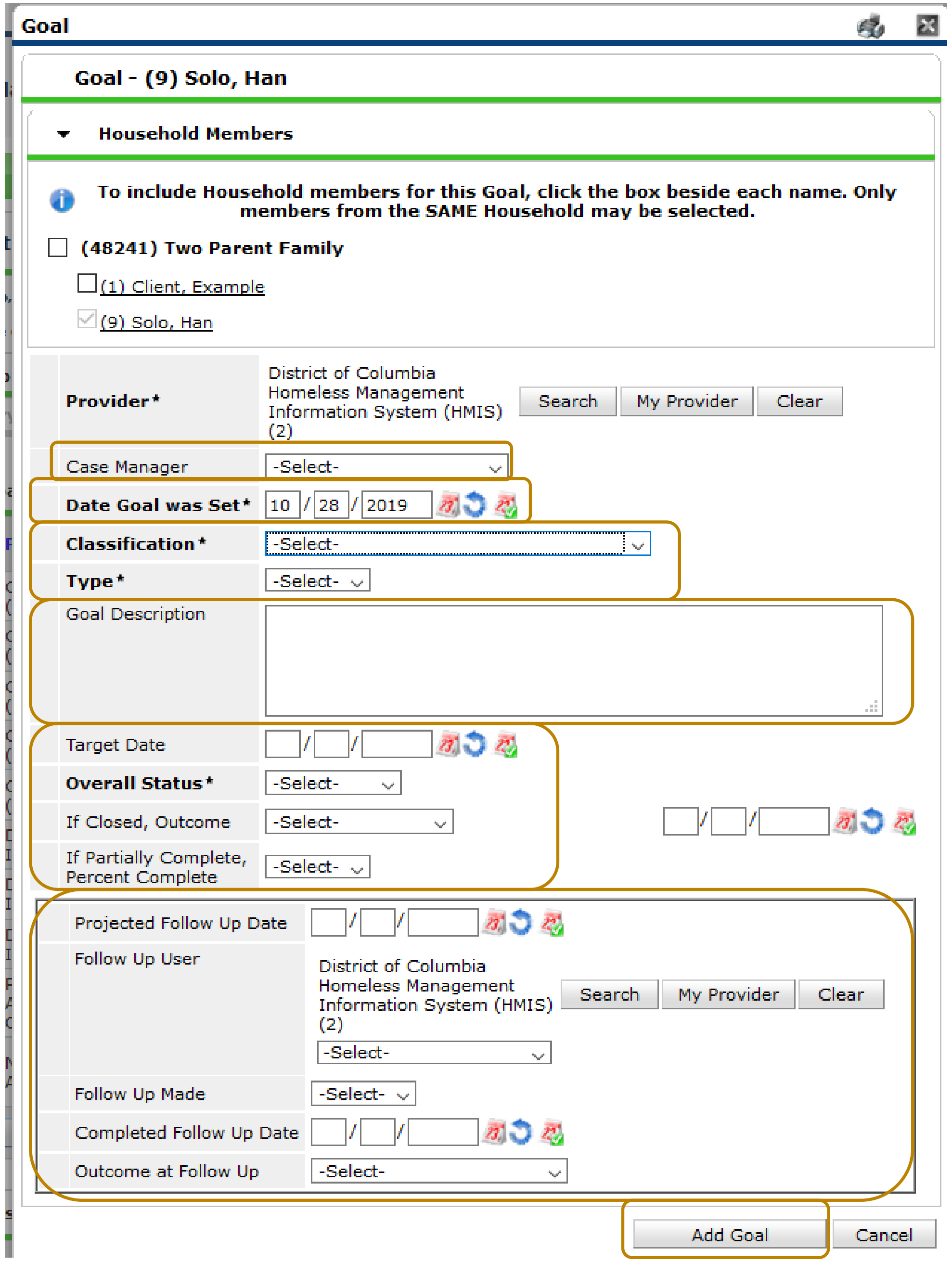

Complete all the fields in the Goal Pop-up box.

Once complete, click “Add Goal”

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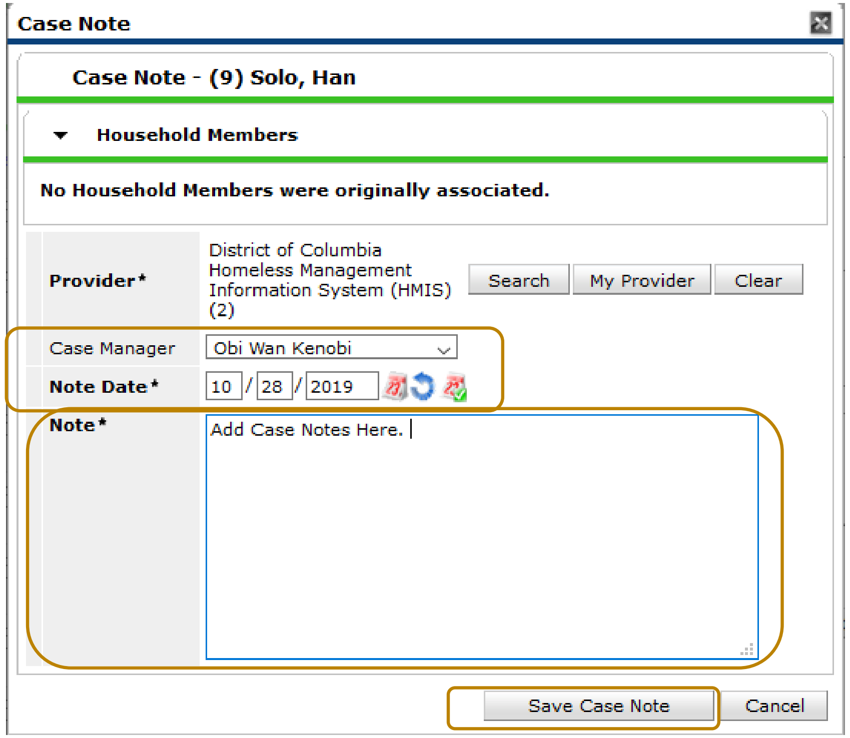
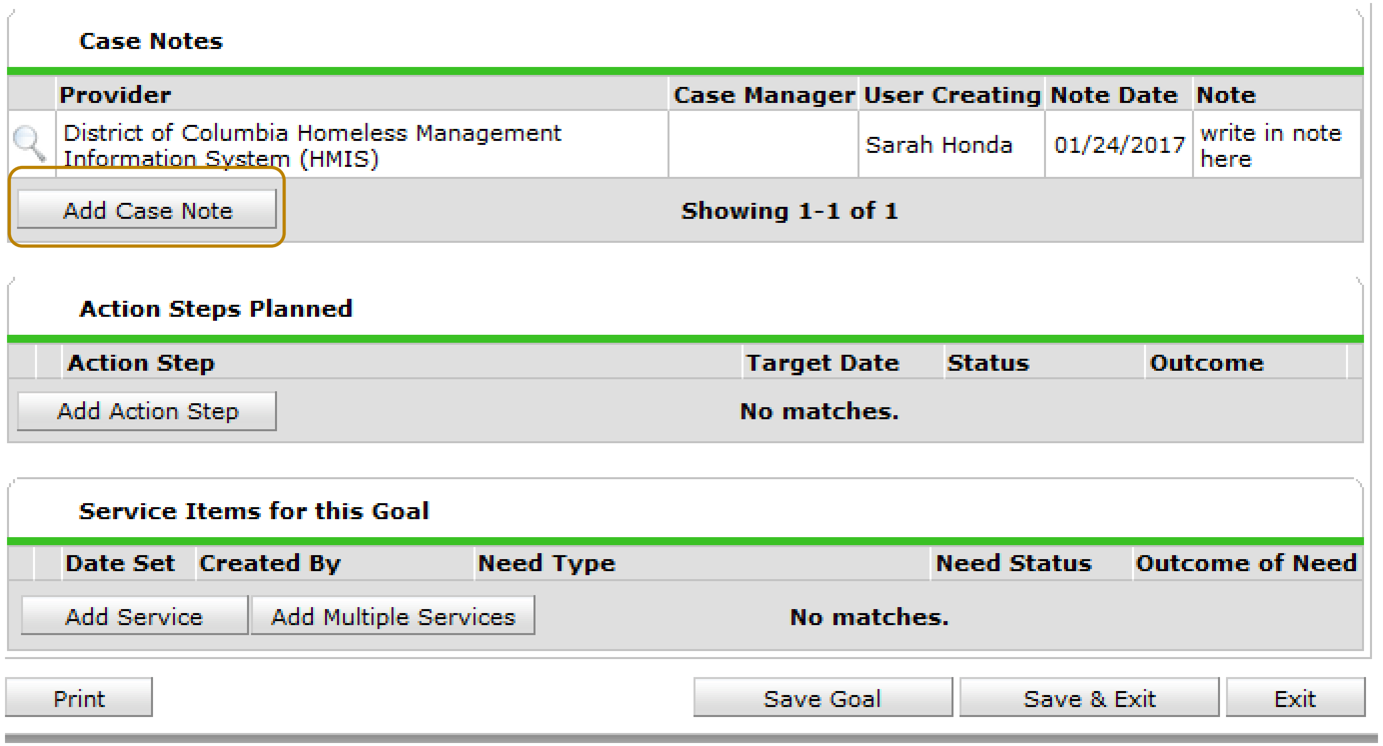
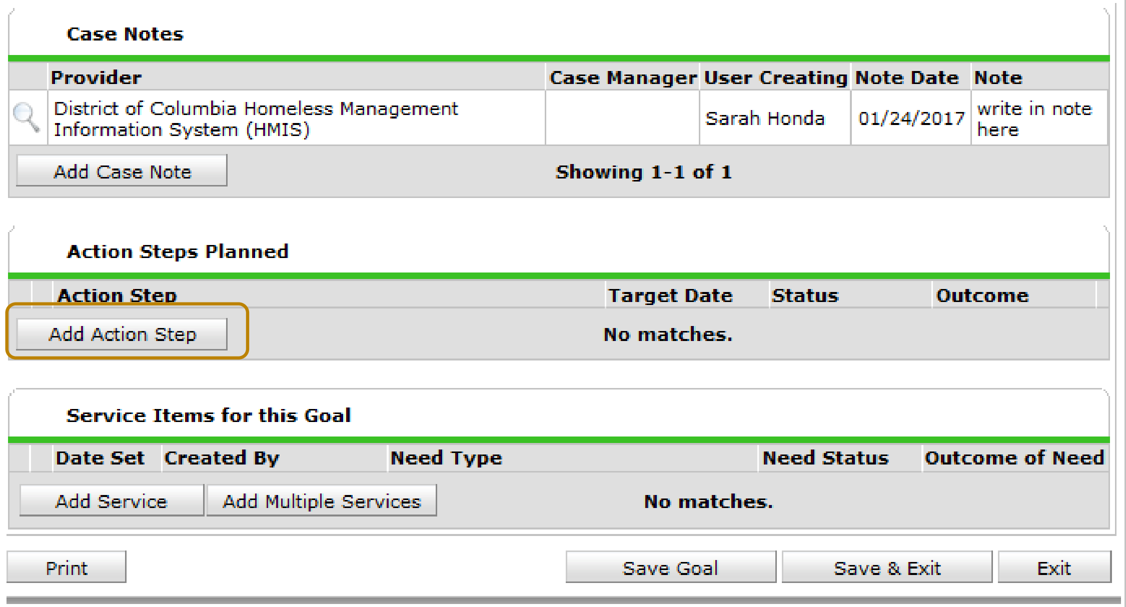
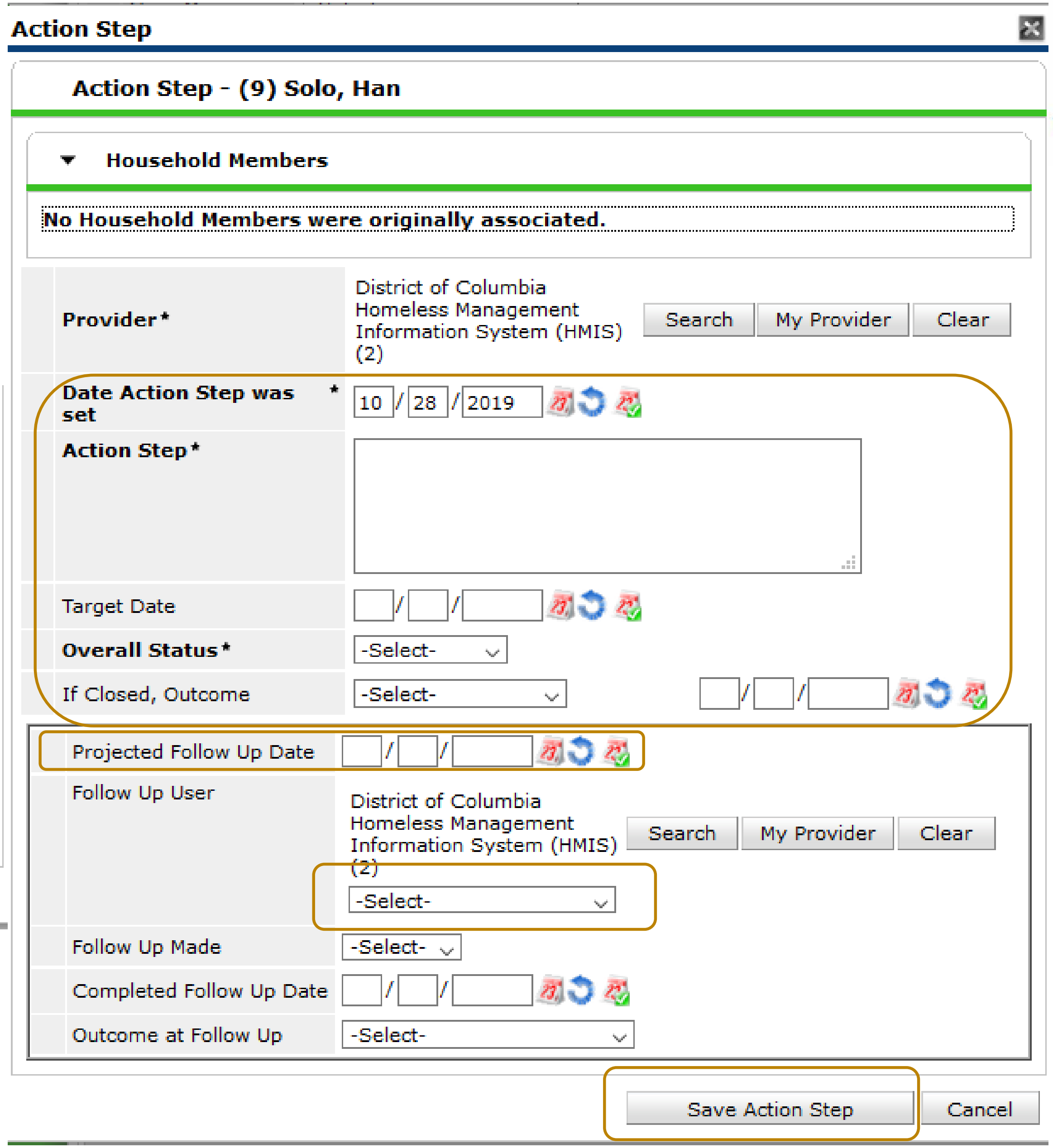
Case Notes





Action Steps





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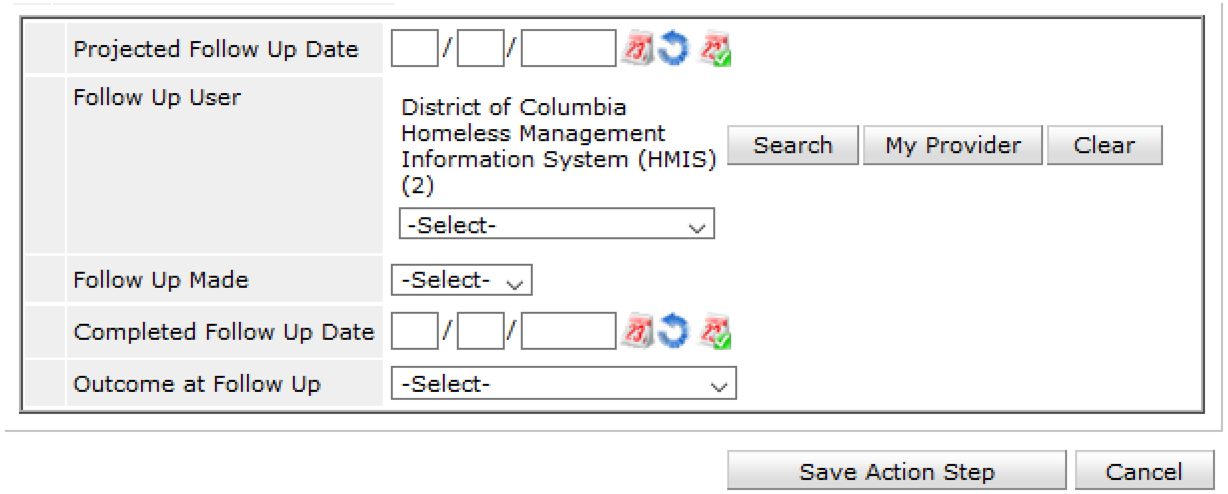
Goal Follow ups

- 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**):



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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.


Demo

Exiting a client from a bed

As with the check in process, the check out process can also be done for 1 client at a time or multiple clients at once.

Shelter Inventory Information

Unit List - HMIS Test Program

Display All Beds **Sort By** Floor Ascending Sort

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
		1	1	Bed 002	Hold	EMPTY					
		1	1	Bed 003	Hold	EMPTY					
		1	1	Bed 004	Hold	EMPTY					
		1	1	Bed 005	Hold	EMPTY					
		1	1	Bed 006	Hold	EMPTY					
		1	1	Bed 007	Hold	EMPTY					
		1	1	Bed 008	Hold	EMPTY					
		1	1	Bed 009	Hold	EMPTY					
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
		1	1	Bed 011	Hold	EMPTY					
		1	1	Bed 012	Hold	EMPTY					
		1	1	Bed 013	Hold	EMPTY					
		1	1	Bed 014	Hold	EMPTY					
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

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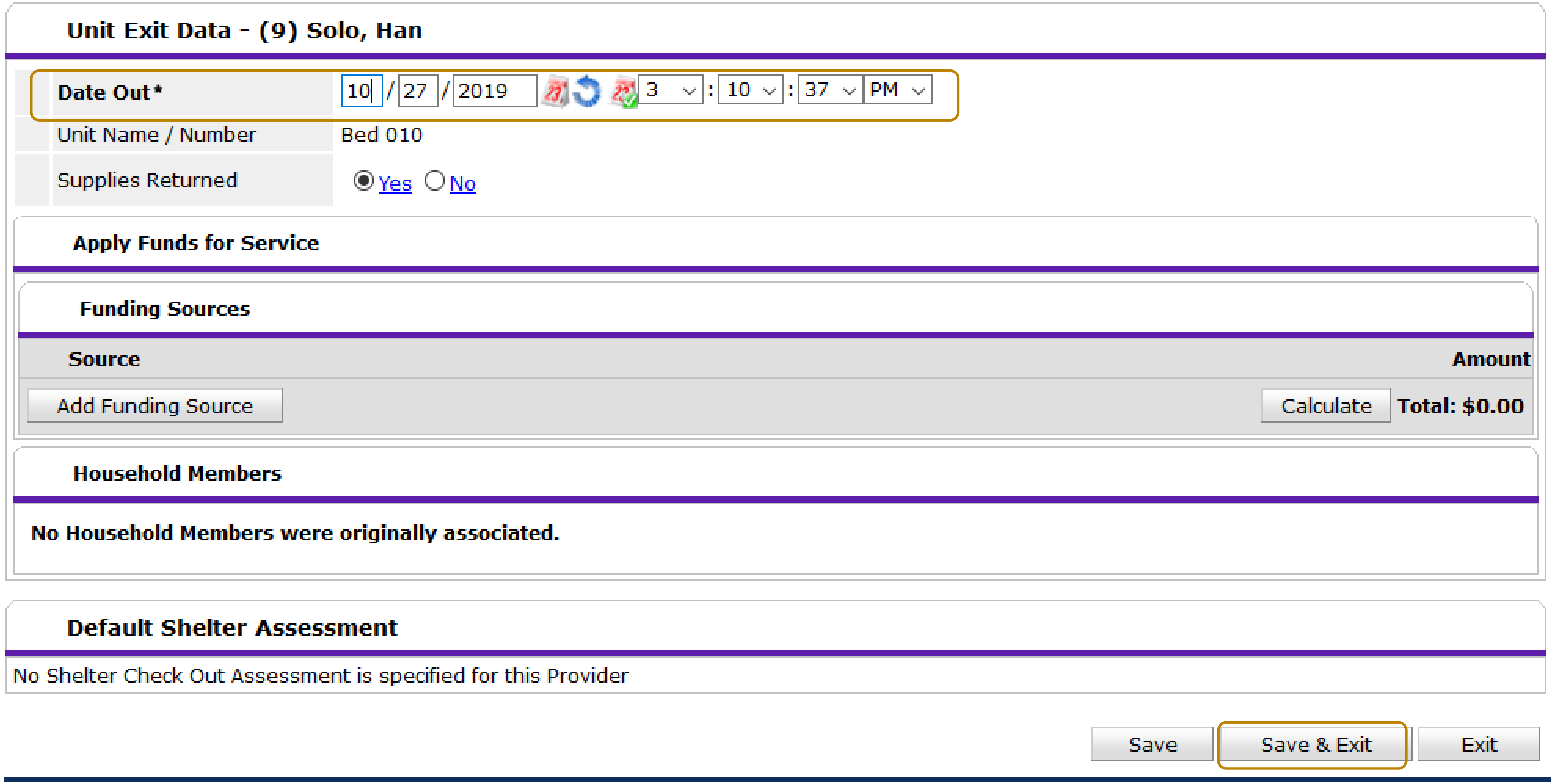

Unit Exit Data - (9) Solo, Han
Date Out *
10 / 27 / 2019
3 : 10 : 37 PM
Unit Name / Number
Bed 010
Supplies Returned
Yes
No
Apply Funds for Service
Funding Sources
Source
Amount
Add Funding Source
Calculate
Total: $0.00
Household Members
No Household Members were originally associated.
Default Shelter Assessment
No Shelter Check Out Assessment is specified for this Provider
Save
Save & Exit
Exit


Demo

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Exiting multiple clients from beds

To check out multiple clients at the same time, you will also access the Unit List for the shelter.

Then you will scroll to the very bottom and on the left-hand side press the "Transmit Today's Checkout List" button.

Unit List - HMIS Test Program

Display: All Beds | Sort By: Floor | Ascending | Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	1	1	Bed 001	Hold	EMPTY					
10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	No	
	1	1	Bed 003	Hold	EMPTY					
	1	1	Bed 004	Hold	EMPTY					
	1	1	Bed 005	Hold	EMPTY					
	1	1	Bed 006	Hold	EMPTY					
	1	1	Bed 007	Hold	EMPTY					
	1	1	Bed 008	Hold	EMPTY					
10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	No	
10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
	1	1	Bed 011	Hold	EMPTY					
	1	1	Bed 012	Hold	EMPTY					
	1	1	Bed 013	Hold	EMPTY					
	1	1	Bed 014	Hold	EMPTY					
	1	1	Bed 015	Hold	EMPTY					
	1	1	Bed 016	Hold	EMPTY					
	1	1	Bed 017	Hold	EMPTY					
	1	1	Bed 018	Hold	EMPTY					
			Overflow (New)		EMPTY					

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

Reservations for Unit List - HMIS Test Program

Arrival Date	Name	Date of Birth	Gender	Group ID
			No matches.	

Add Reservation

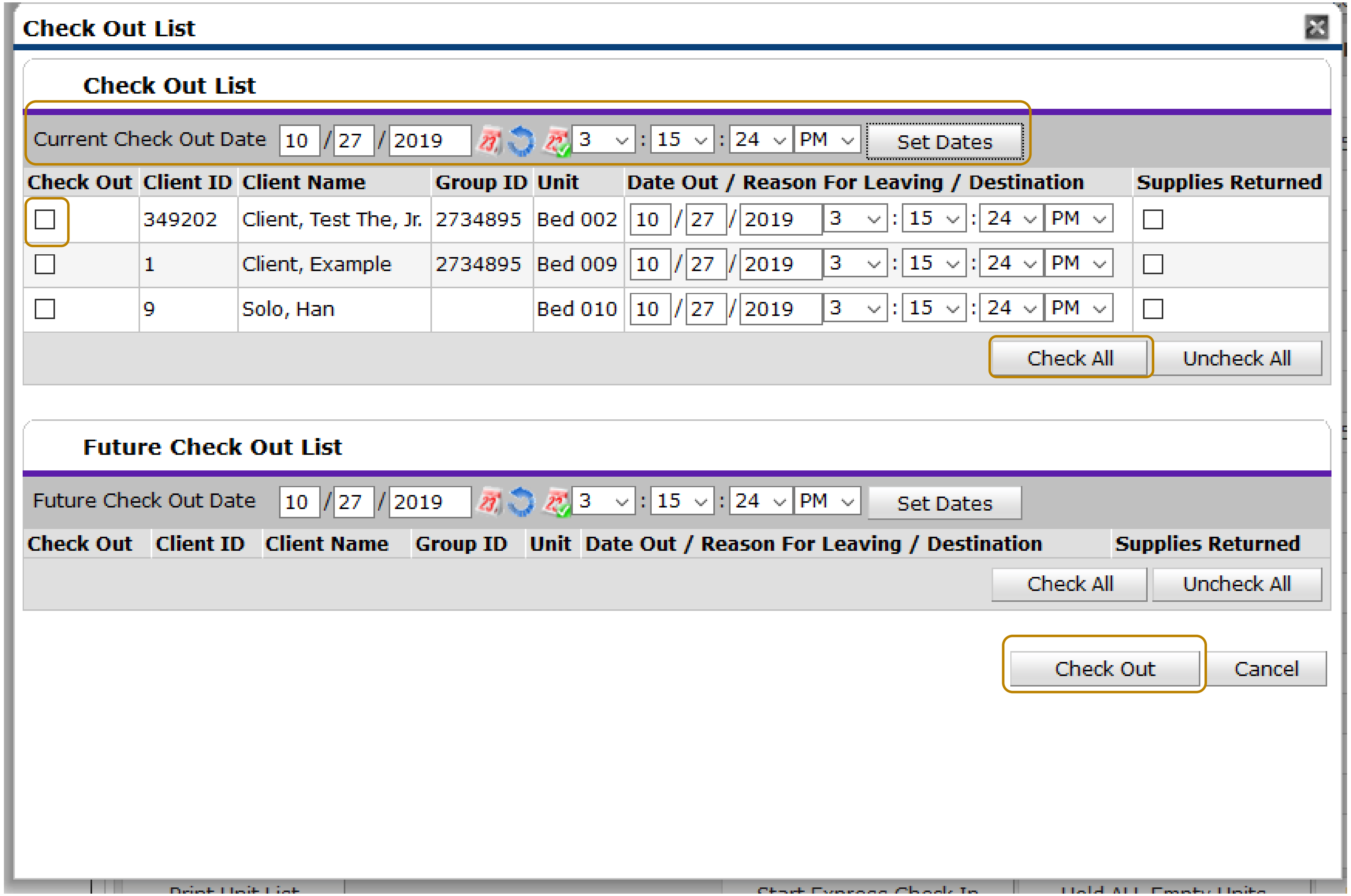
Outstanding Referrals - HMIS Training (Program) (1064) - 0 total

Check Unit Availability

Referral Date	Name	Ranking	Need Type	Referred By	Date of Birth	Gender	Group ID
				No matches.			

Return to ShelterPoint Dashboard | Print ID Cards | Update Confirmation List | Transmit Today's Check Out List

- Select which clients will be checked out by clicking the checkbox next to their names or pressing the “Check All” button.
- Set the date of exit by pressing the “Set Dates” button
- Click “Check Out”



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Demo

Common Data Entry Errors

ShelterPoint Edition

- Adding the incorrect client to a bed
- Adding a client to the wrong bed

Adding the Wrong Client to a bed

Sometimes we choose the wrong client record when checking clients into ShelterPoint.

In this case, they should not have a Shelter Stay attributed to their record.

We want to DELETE this Shelter Stay, not just check them out of the bed.

Unit List - HMIS Test Program

Display All Beds **Sort By** Floor Asce

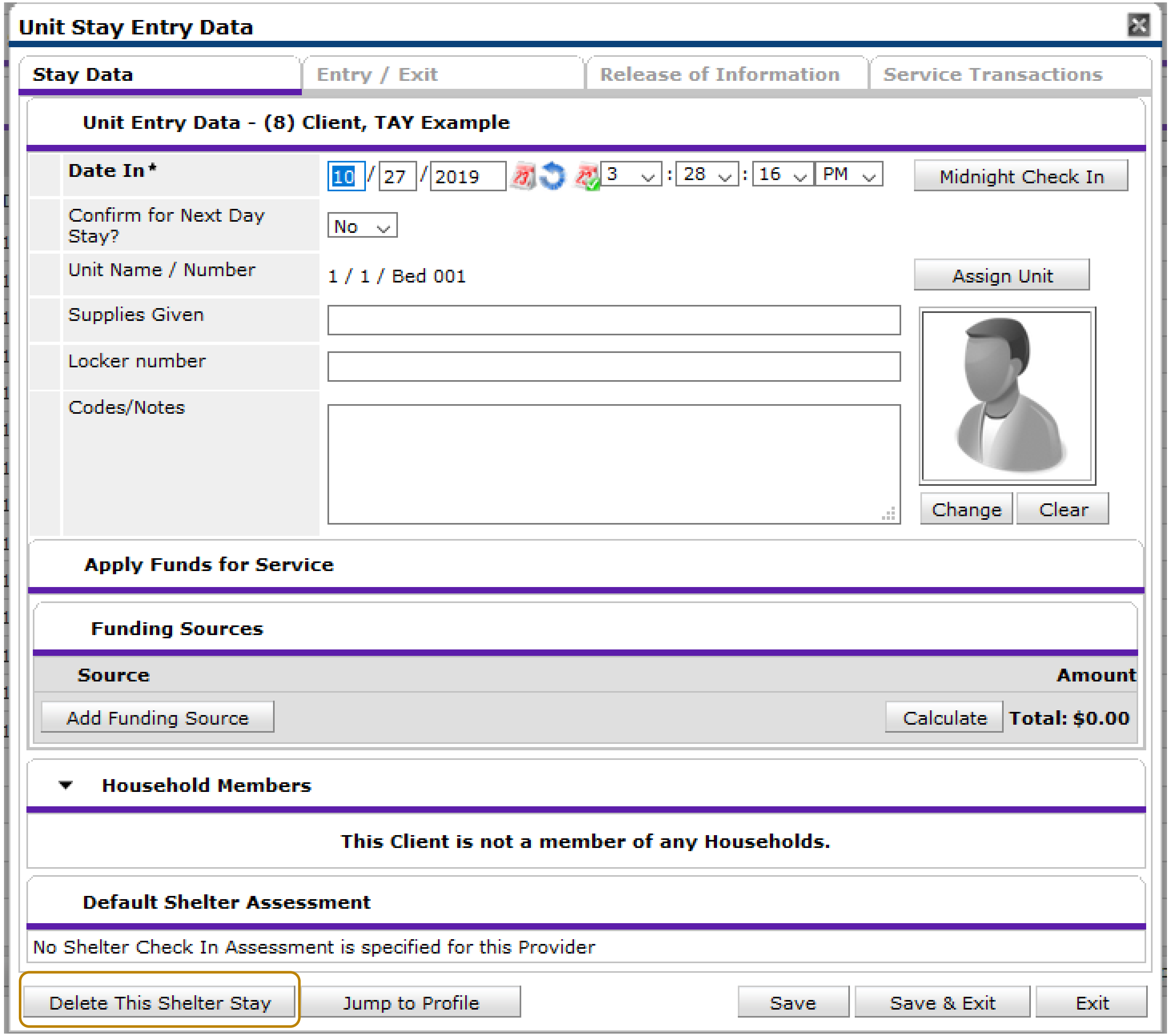
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	C
10/27/2019	1	1	Bed 001		(8) Client, TAY Example	01/17/2003	Female		N
10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	N
10/27/2019	1	1	Bed 003		(6) Client, Example Child	01/01/2000	Male		N
10/27/2019	1	1	Bed 004		(345617) Child, Tester	01/01/2017			N
10/27/2019	1	1	Bed 005		(373993) Example, Test	11/08/1990	Male		N
10/27/2019	1	1	Bed 006		(348382) DOE, TEST M	02/14/1984	Female		N
10/27/2019	1	1	Bed 007		(360827) NN, test	10/20/1988	Female		N
10/27/2019	1	1	Bed 008		(367097) tes, tester				N
10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	N
10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		N
10/27/2019	1	1	Bed 011		(341127) test, test				N
10/27/2019	1	1	Bed 012		(345616) Tester, Tester		Male		N
10/27/2019	1	1	Bed 013		(391899) White, Test	01/05/1980	Male		N
10/27/2019	1	1	Bed 014		(356199) youth hope, test				N
	1	1	Bed 015	Hold	EMPTY				
	1	1	Bed 016	Hold	EMPTY				
	1	1	Bed 017	Hold	EMPTY				
	1	1	Bed 018	Hold	EMPTY				
			Overflow (New)		EMPTY				

Print Unit List | Start Express Check In | Hold ALL Empty Units | F

In this Case, I entered Client 8 into my bed list when I really meant to add a different client record.

I click on their name in the Unit List to get to the Unit Stay Entry Data pop-up.

I then click “Delete This Shelter Stay”



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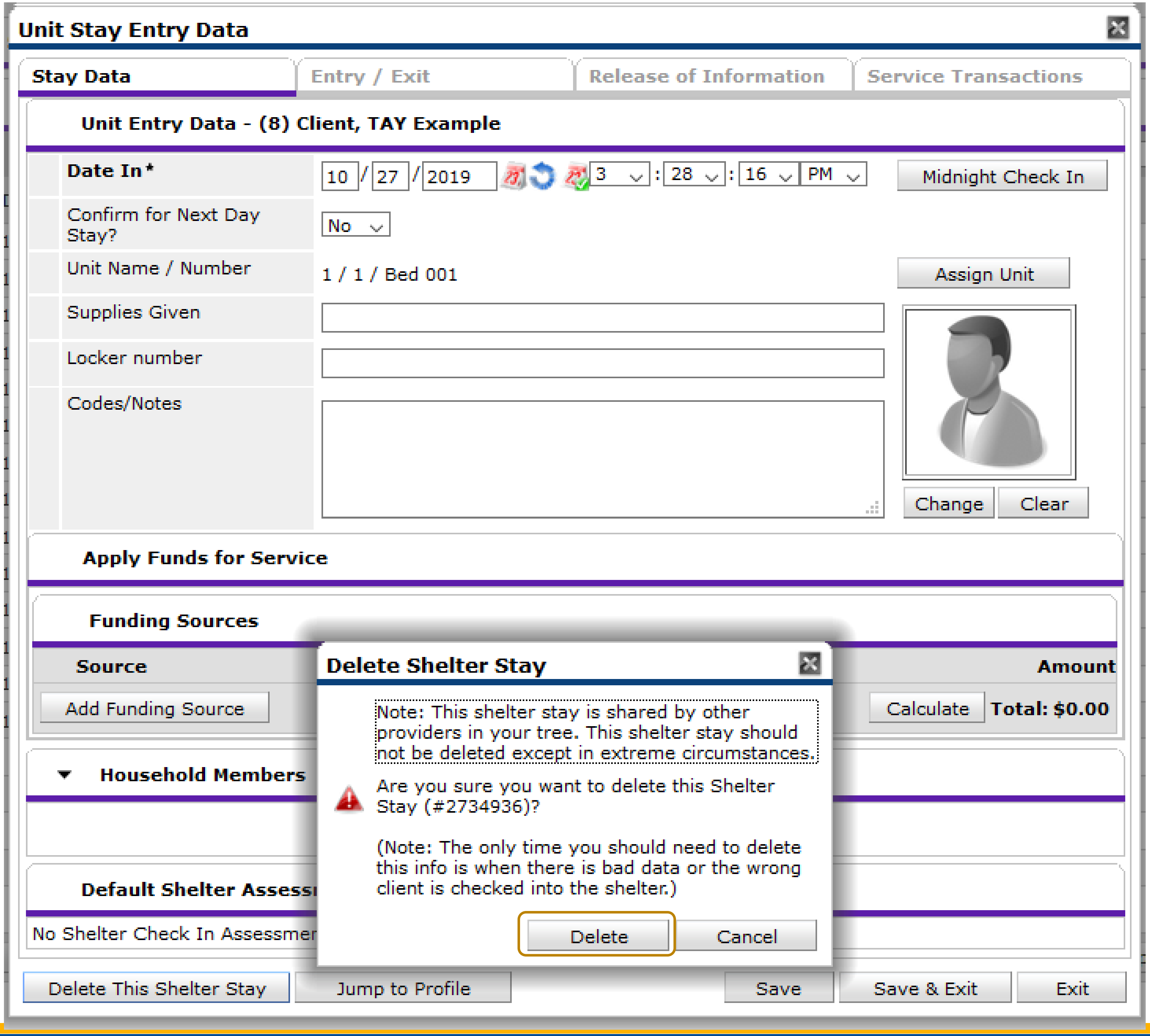
In this Case, I entered Client 8 into my bed list when I really meant to add a different client record.

I click on their name in the Unit List to get to the Unit Stay Entry Data pop-up.

I then click “Delete This Shelter Stay”

ServicePoint will ask “Are you sure you want to delete this?”

Click “Delete” to complete deleting the shelter stay.



Adding a client to the wrong bed

Sometimes a client is added to the wrong bed, or the client moves during their stay.

You do not want to exit the client and then re-add them since it is the same stay in shelter.

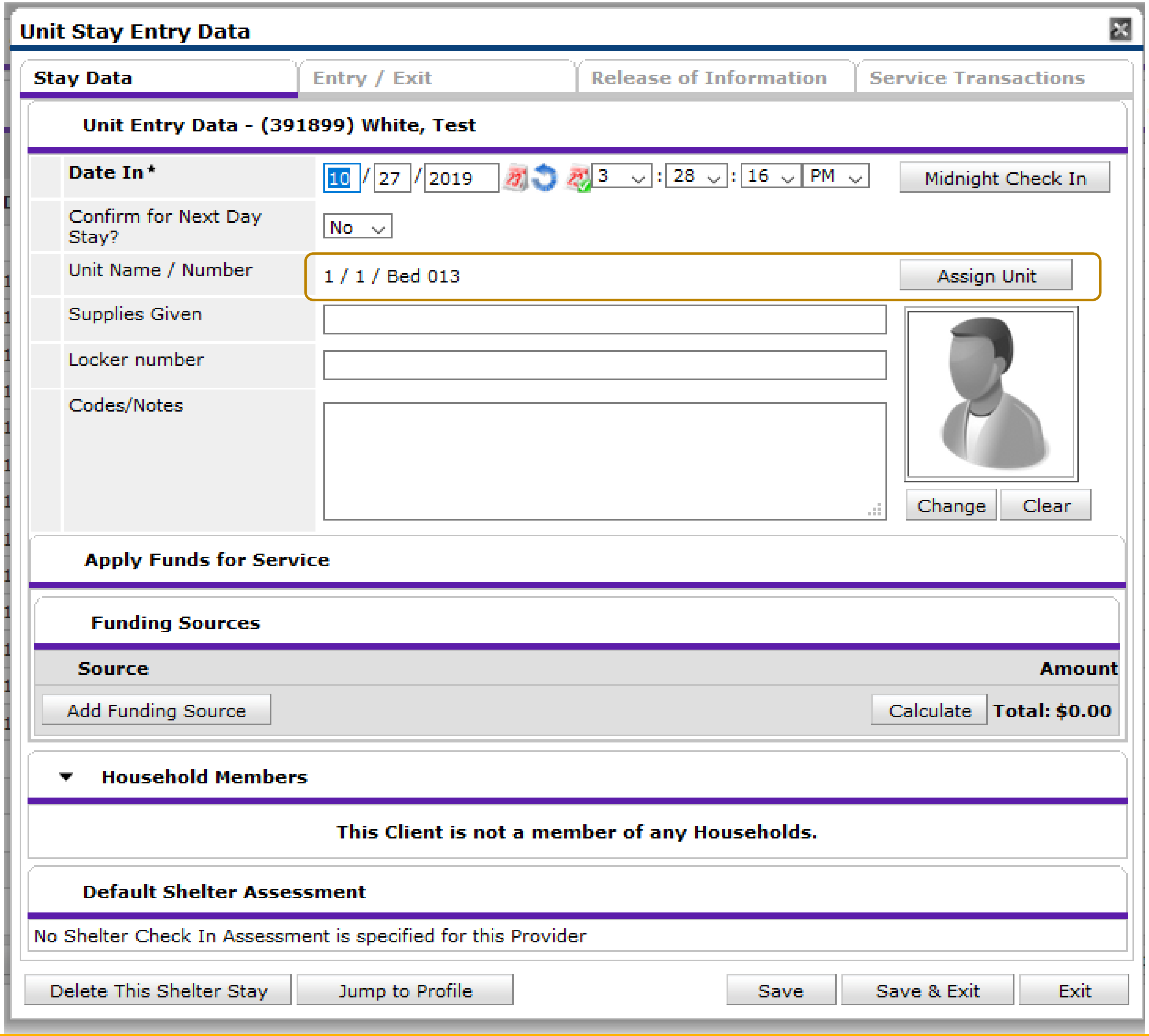
You want to only change the bed they are in on the unit list.

Unit List - HMIS Test Program

Display All Beds | Sort By Floor | Ascending | Sort

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
	10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	No	
	10/27/2019	1	1	Bed 003		(6) Client, Example Child	01/01/2000	Male		No	
	10/27/2019	1	1	Bed 004		(345617) Child, Tester	01/01/2017			No	
	10/27/2019	1	1	Bed 005		(373993) Example, Test	11/08/1990	Male		No	
	10/27/2019	1	1	Bed 006		(348382) DOE, TEST M	02/14/1984	Female		No	
	10/27/2019	1	1	Bed 007		(360827) NN, test	10/20/1988	Female		No	
	10/27/2019	1	1	Bed 008		(367097) tes, tester				No	
	10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	No	
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
	10/27/2019	1	1	Bed 011		(341127) test, test				No	
	10/27/2019	1	1	Bed 012		(345616) Tester, Tester		Male		No	
	10/27/2019	1	1	Bed 013		(391899) White, Test	01/05/1980	Male		No	
	10/27/2019	1	1	Bed 014		(356199) youth hope, test				No	
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units



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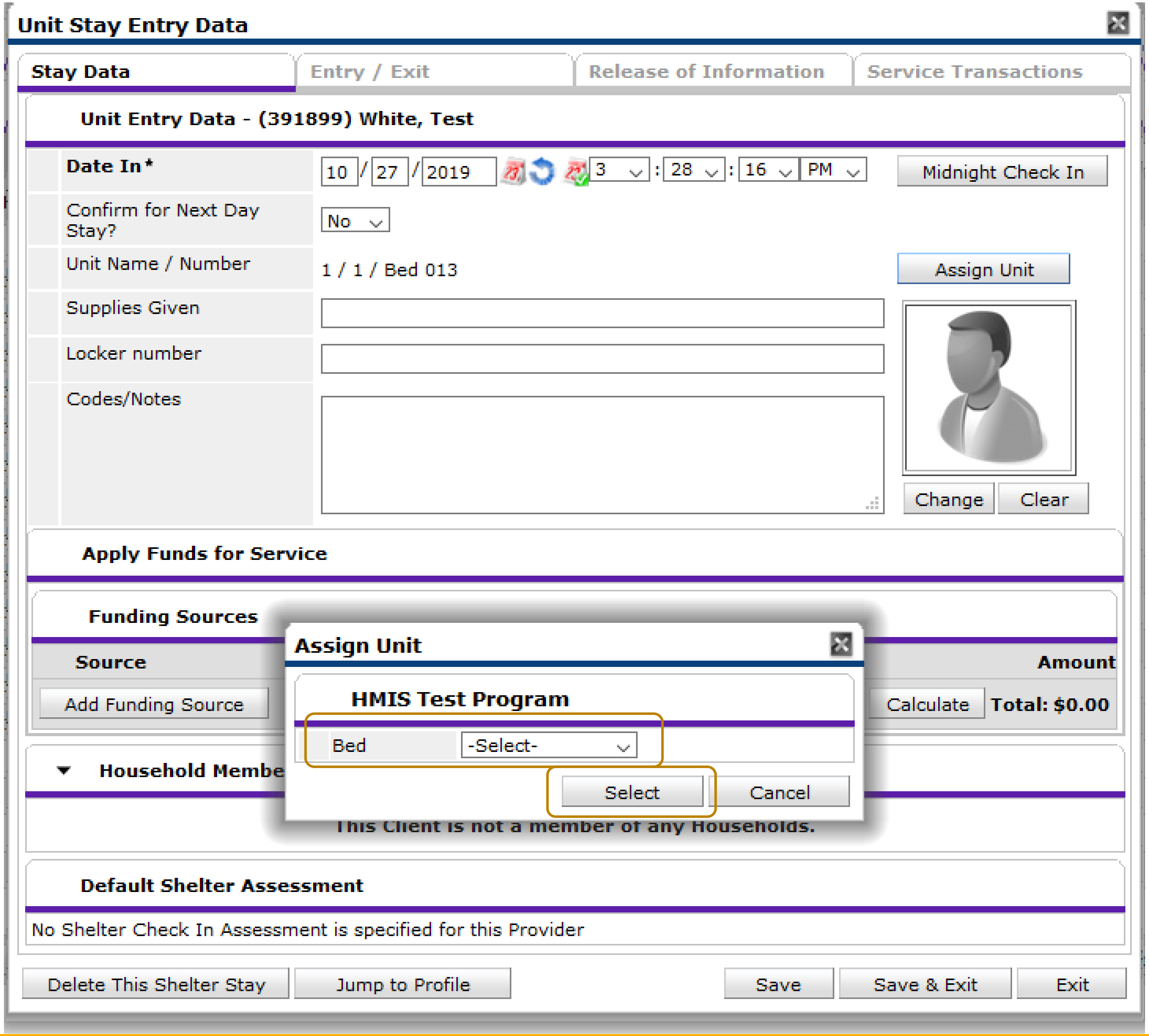

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HMIS Policy Updates

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.

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.

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.

Third Violation

Review Panel Formed

<u>Minimum</u> 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 HMIS@community-partnership.org. 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