PEP V HMIS Training

The Community Partnership
For The Prevention
of Homelessness

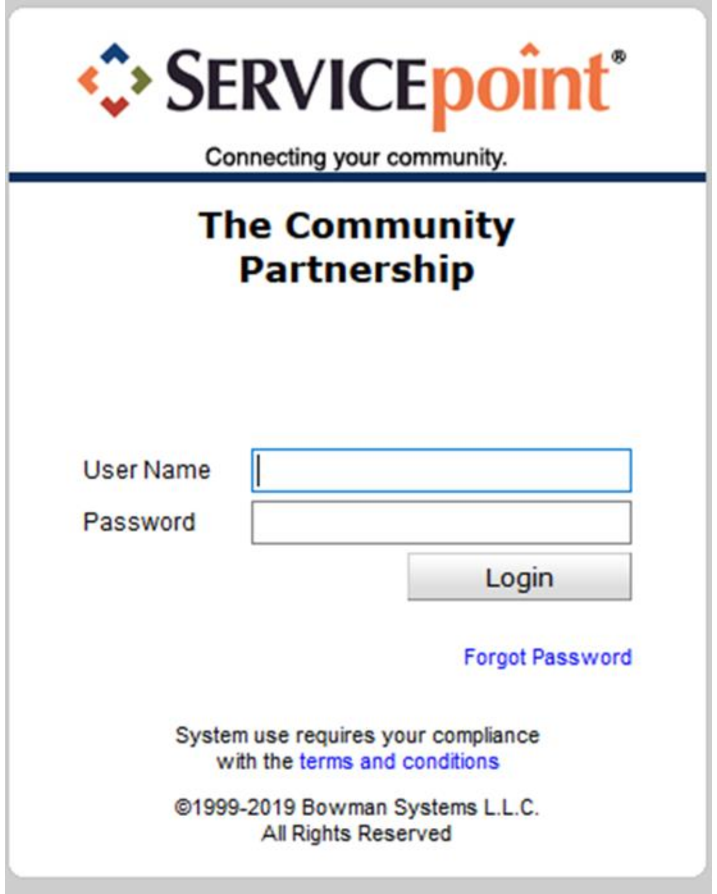
Agenda

- What is HMIS?
- Who Participates?
- What is expected of you/your agency?
  - Data Entry
  - Trainings
- Common HMIS Terms
- Who can see what?
  - Visibility
  - Data Security
- Logging into the system
- Introduction to ClientPoint
- Case Managers, Goals, and Case Notes
- Help and Support
  - Helpdesk
  - System News

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



Who Participates?

- Agencies that receive Federal and District funding:
  - HUD CoC
  - HUD ESG
  - HUD VASH
  - HUD HOPWA
  - HHS RHY
  - HHS PATH
  - VA SSVF
  - VA GPD
  - DHS Sole Source
  - DHS Management
  - DHS Direct
  - TCP Direct

- Agencies who provide services to homeless individuals and families within the District of Columbia - you do not need to be in the list above to participate!

Funder vs Lead Agency

FUNDER (DHS, HUD, VA, TCP)

- Provides agencies grants to be able to serve clients
- Requires the use of HMIS as part of the grant agreement
- Works with the Lead Agency to ensure their grantees are entering into HMIS and that they receive the reports required for system analysis and grant competitions
- Fields programmatic and grant related questions

LEAD AGENCY (THE COMMUNITY PARTNERSHIP)

- Ensures the HMIS is functional and up to date
- Ensures agencies are correctly entered into HMIS
- Monitors for data quality, both at the system level and at the funding level.
- Answers HMIS related questions through the helpdesk
- Provides trainings to users of the HMIS
- Provides reports to Funders and the Continuum of Care (CoC) as a whole

What is expected of you/your agency?

- Users go through training, both initially and when asked to by the Lead Agency

- Complete accurate and timely data entry
  - Data Quality reports are an important way to ensure accurate data entry, you are expected to use the data quality reports sent to you to make corrections to your data on at least a quarterly basis.
  - Timely data entry allows for our system to function. For data entry into HMIS, timely is within **48 hours**

Common HMIS Terms

- HMIS - *already covered*
- Lead Agency – *already covered*
- Agency Admin – *already covered*
- CoC
- CAHP
- Provider
- Project Type
- Units/Beds
- Workflow
- Assessments and Sub-assessments
- Universal Data Elements (UDEs)
- Common Data Elements
- Funder Specific Data Elements
- ART

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Continuum of Care (CoC)

- The Continuum of Care of DC is the group of agencies and people that are involved in and interested in the homeless response system within the geographic boundaries of the District of Columbia.
- The CoC is coordinated and managed through the CoC Board. This board is the DC Interagency Council on Homelessness's Executive Board. This board hears from the various committees to inform its decisions.
- The Continuum of Care makes such decisions as:
  - The CoC's priorities for funding competitions,
  - CAHP prioritization rules and policies
  - Privacy and data sharing policies within HMIS
  - The Strategic Plan for the Homeless Response System of DC

Coordinated Assessment and Housing Placement (CAHP)

- Coordinated Assessment or Coordinated Entry is a process by which vulnerable people are prioritized for placement into housing programs.
- This is a community based process that is staffed by TCP. It is more than just the information within HMIS, but HMIS information plays a HUGE role in the process as it provides us
- Specialized CAHP training is provided to those who need to complete assessments and housing placements.
- DC's CAHP system is split into 4 sub groups
  - Families
  - Single Adults
  - Youth
  - Veterans

Provider

- Provider is a term specific to HMIS software. It is how the information is organized in the database
- There are 3 main types of providers in our system
  - Agency providers
  - Program providers
  - CAHP providers
- Provider Naming convention

[Agency Name or Acronym] – [Program Name] – [Project Type Population] – [Funding Source] (Provider ID#)

TCP – Chronic Homeless Initiative (CHI) 6– PSH IND – HUD CoC(1736)

Project Types

Project Types are classifications of what your program or programs do. Here are the categories your program will fit into:

- Homelessness Prevention (HP)
- Street Outreach(SO)
- Emergency Shelter(ES)
- Safe Haven (SH)
- Transitional Housing (TH)
- Rapid Re-housing (RRH)
- Transitional Housing/Rapid Re-housing joint project (TH/RRH)
- Permanent Supportive Housing (PSH)
- Permanent Housing with Services (PH-S)
- Permanent Housing – Housing Only (PH-HO)
- Coordinated Entry (CE)
- Day Shelter (DS)
- Supportive Services Only (SSO)
- Other(Other)

Units/Beds

- The number of spaces available within a housing program for serving clients.
- The use of units is typically for Families where there are multiple beds within a unit. How many families are you able to serve in your program will get your number of units. The average family size will give us the number of beds in your program.
- For singles, the units and the beds are the same number – how many people are you able to serve?
- For rapid rehousing, this number can fluctuate.

Workflow

- A Workflow is how you enter data into HMIS. There are 4 main workflows in DC’s HMIS:
  - **Entry/Exit Workflow** – Used by the majority of programs. Uses the ClientPoint module in ServicePoint for most data entry.
  - **ShelterPoint Workflow** – Used by Low Barrier and Severe Weather Shelters. Uses the ShelterPoint module in ServicePoint for most data entry.
  - **SkanPoint Workflow** – Used by Outreach and Day Shelters. Uses the SkanPoint module in ServicePoint for most data entry.
  - **Case Plans** – Used by case managers. Uses the ClientPoint module in ServicePoint.
- Trainings are split up by type of workflow.

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.

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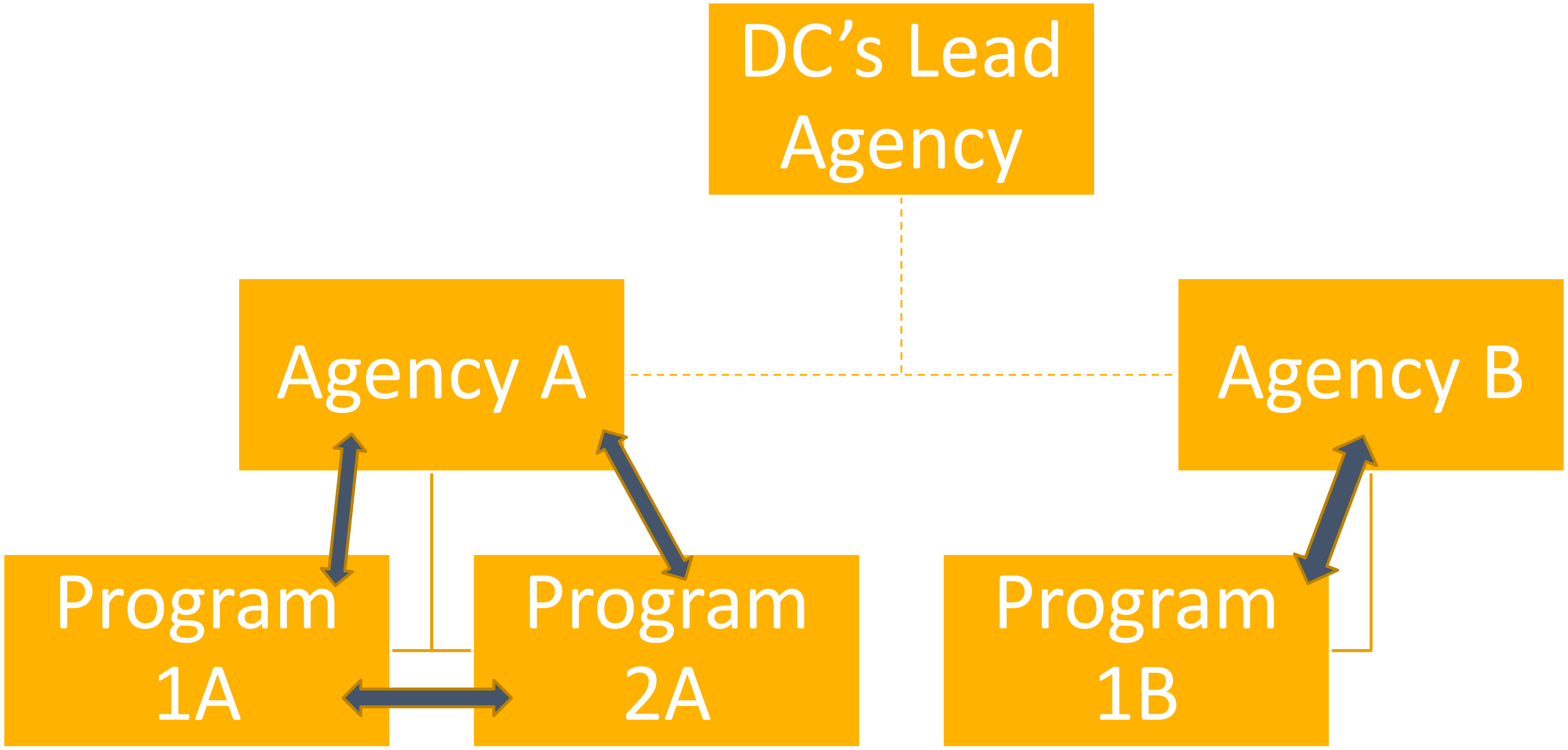
Visibility Basics – Current Structure



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)

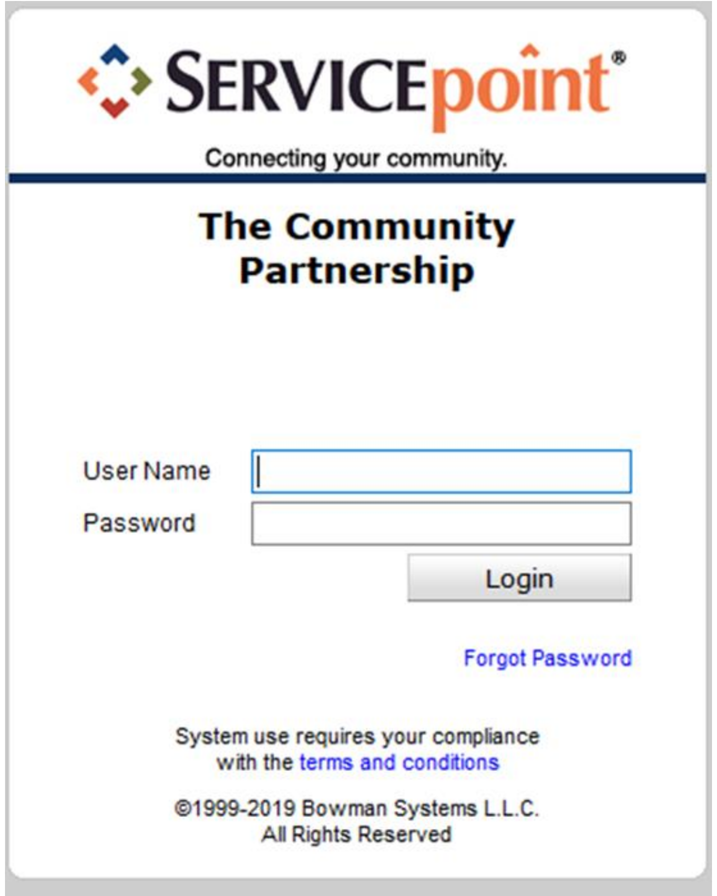
- Disabling Condition (Yes/No)
- Project Start Date
- Project Exit Date
- Destination
- Relationship to Head of Household
- Client Location
- Housing Move in Date (for RRH and Permanent Housing projects)
- Prior Living Situation

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/



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

Logging In

Training site:
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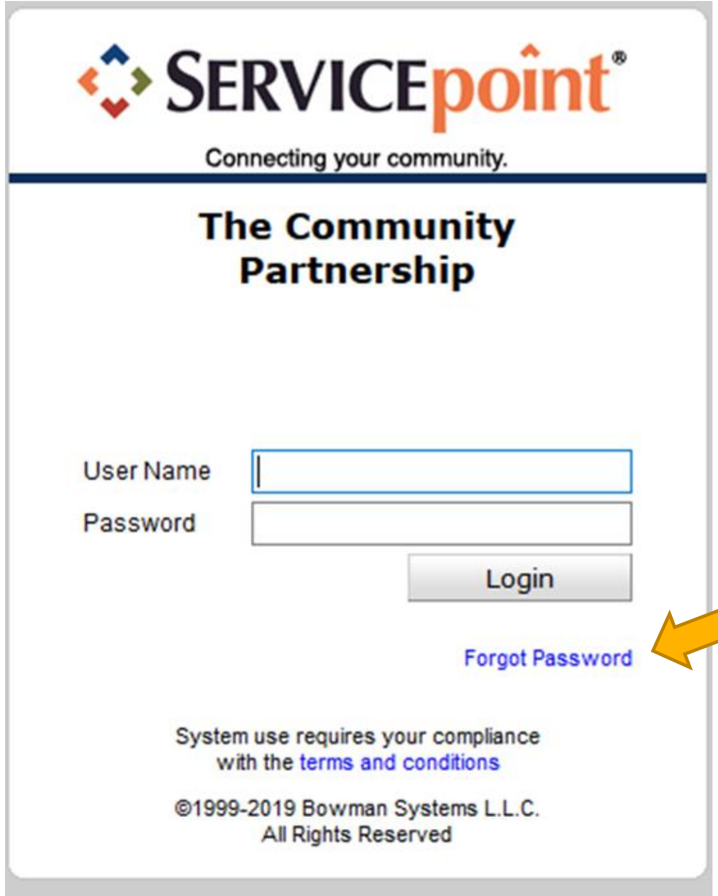


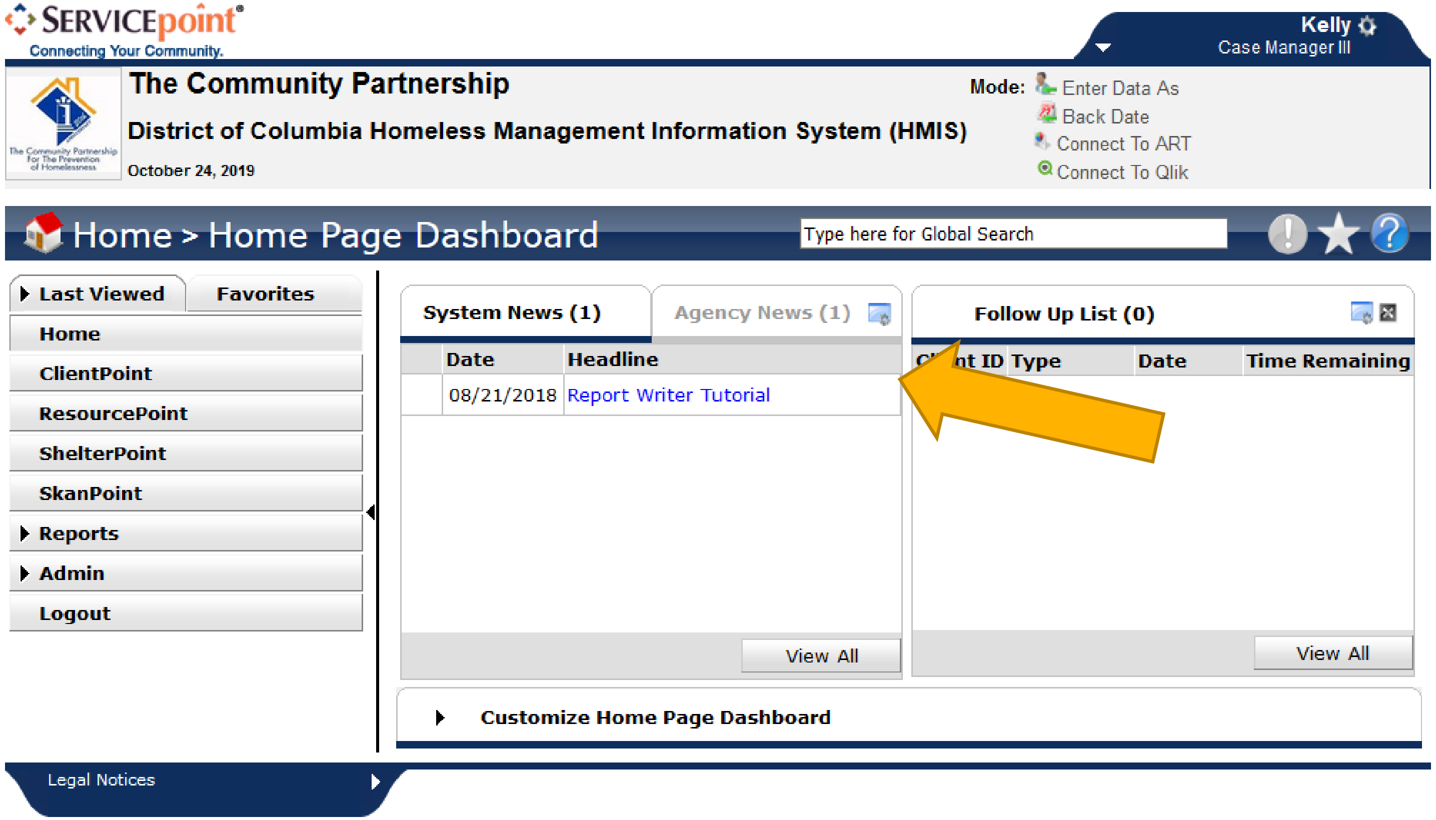
Live site:
https://washdc.servicept.com

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…



Enter Data As

- In order for you to create Case Plans and Case Notes for the PEP V Sites you MUST Enter Data As to the PEP V Program

What is Enter Data As?

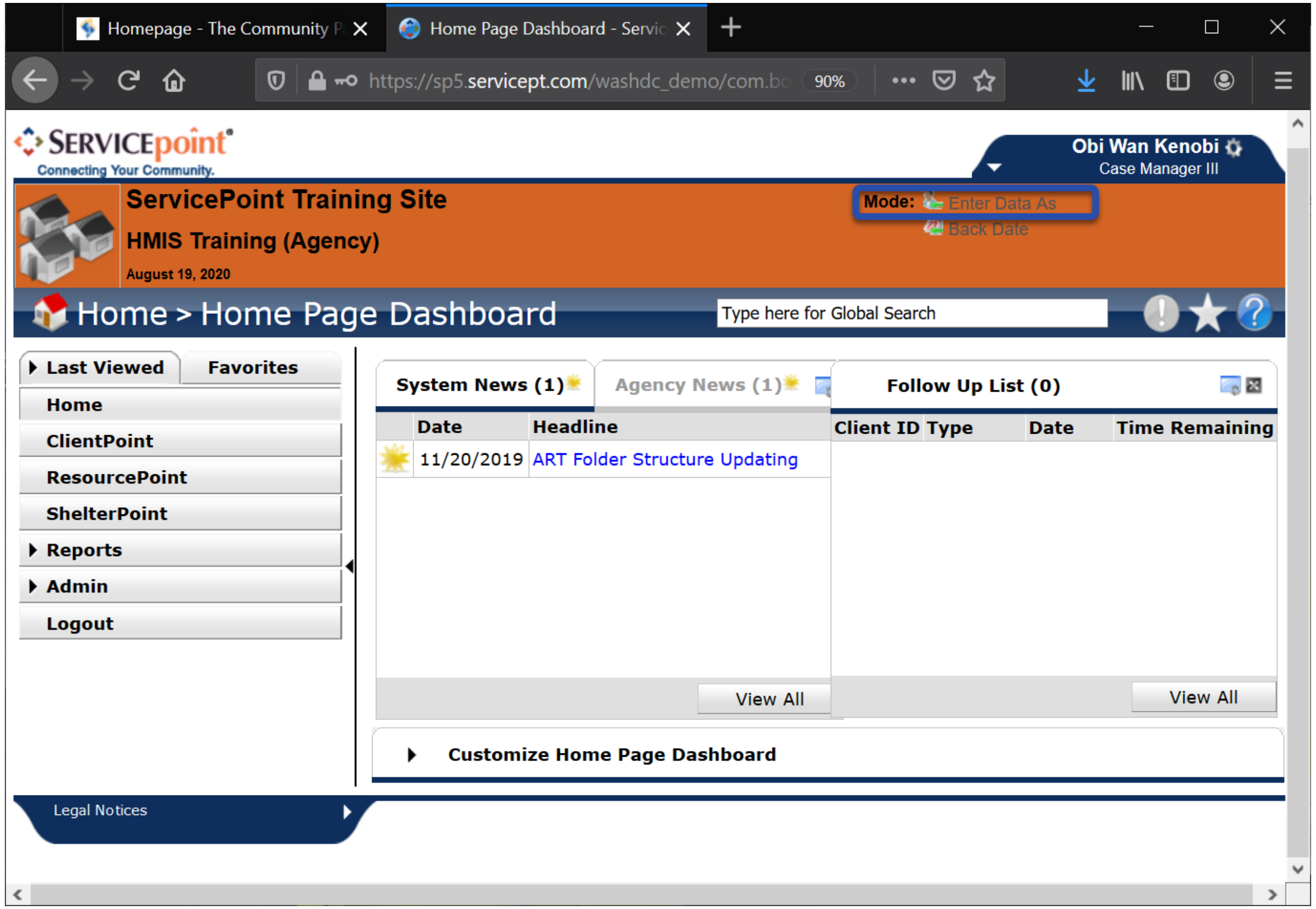
- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.

Why use Enter Data As?

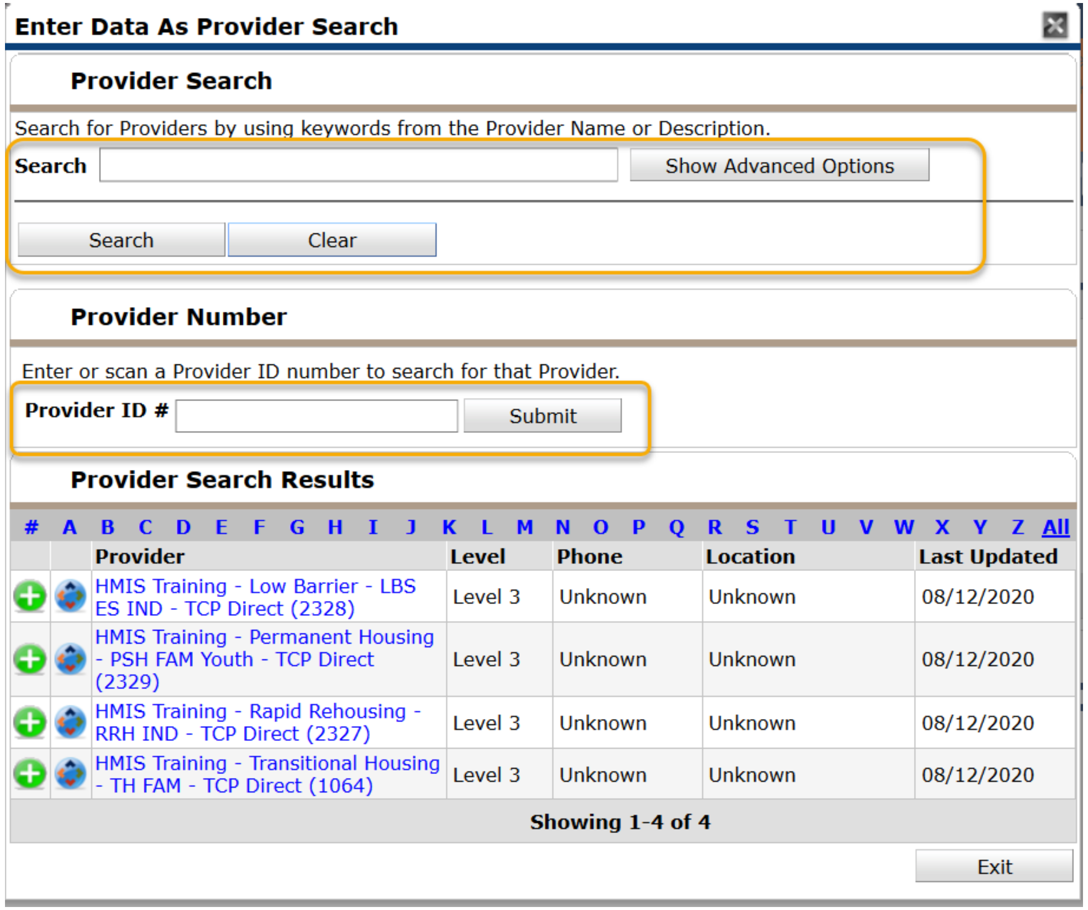
- **Allows for you to see what is shared with individual programs.**
- Allows others to see data from your shelter/prevention/outreach program
- You do not have to manually change your provider in your
  - Entry/exits
  - Goals
  - Case plans
  - Case notes
  - Case managers
  - Services
  - File attachments

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



How to Enter Data As – Step 2



Enter Data As Provider Search

Provider Search

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

Search | Show Advanced Options

Search | Clear

Provider Number

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

Provider ID # | Submit

Provider Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

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

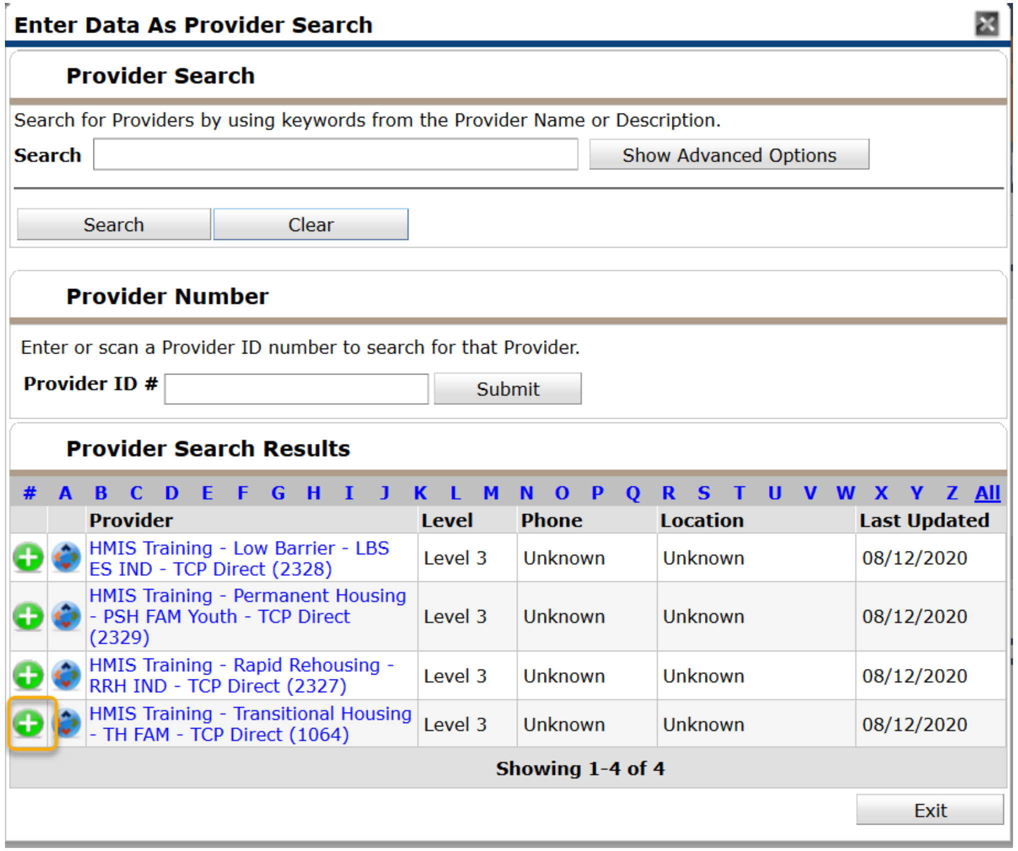
Showing 1-4 of 4

Exit

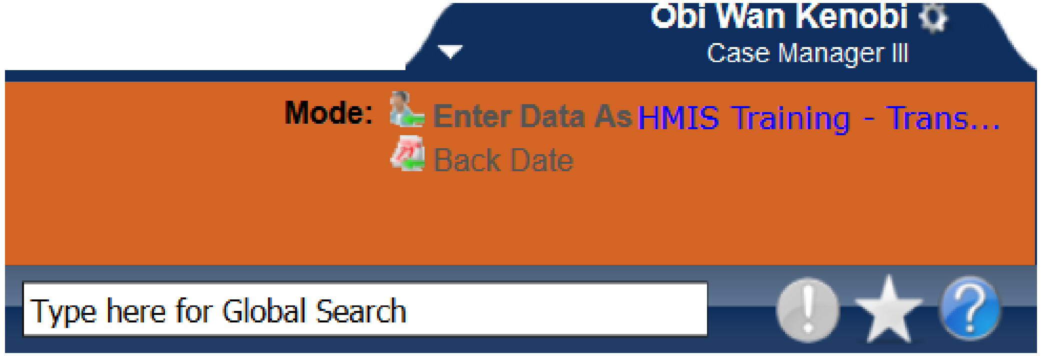
- Find the program you are going to be doing data entry as.
  - You can search in the search box
  - You can type in the provider id
  - You can look through the list of options for the correct provider

How to Enter Data As – Step 3

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



How to Enter Data As – Step 5

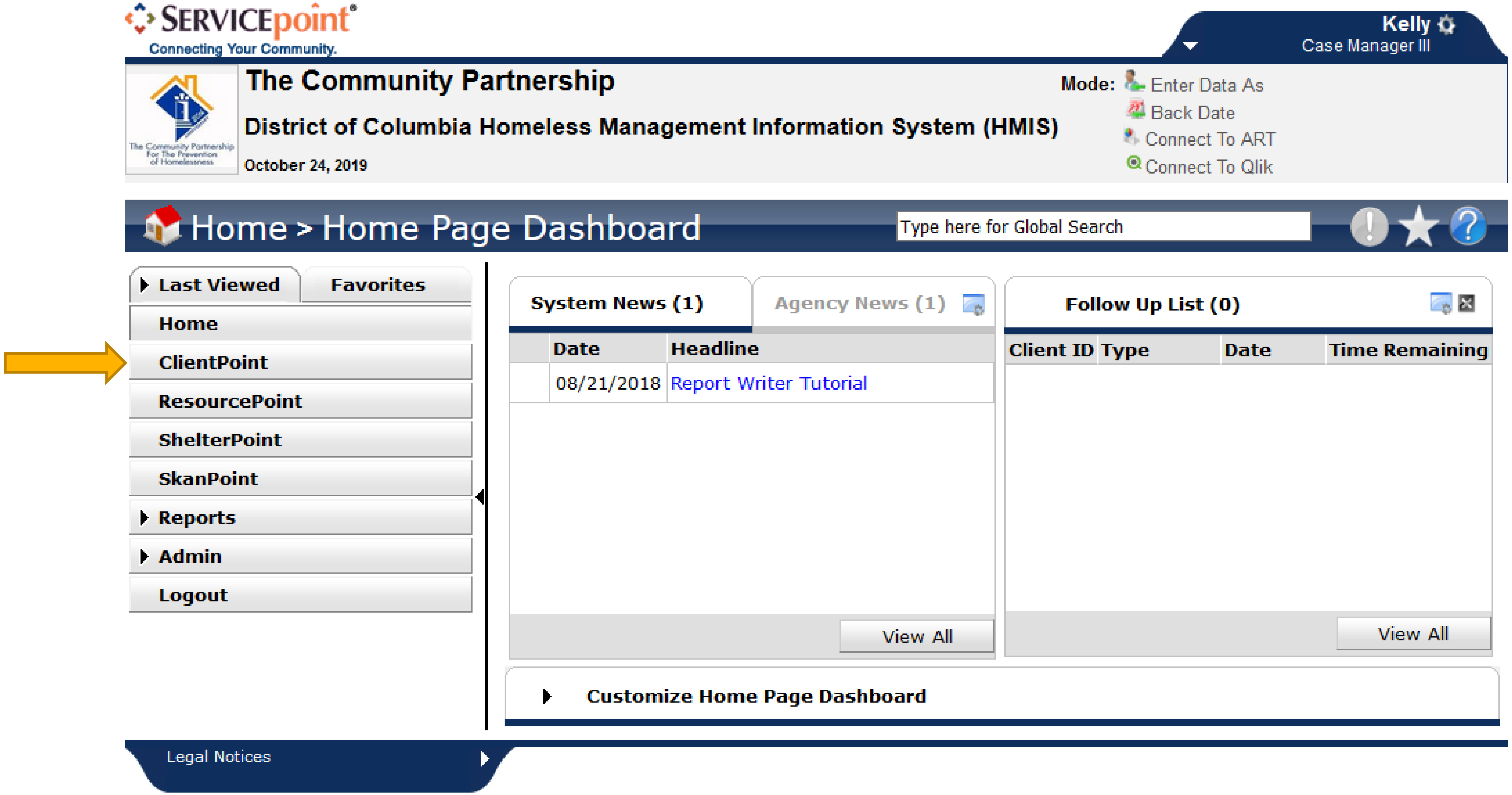


- When you click the green plus sign, the name of the provider you will be doing data entry as will appear next to Enter Data As.
- To remove the EDA click on the name of the provider (blue text).


Demo

Introduction to 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.



SERVICEpoint
Connecting Your Community.
Kelly
Case Manager III
The Community Partnership
District of Columbia Homeless Management Information System (HMIS)
October 24, 2019
Mode:
Enter Data As
Back Date
Connect To ART
Connect To Qlik
Home > Home Page Dashboard
Type here for Global Search
Last Viewed
Favorites
Home
ClientPoint
ResourcePoint
ShelterPoint
SkanPoint
Reports
Admin
Logout
System News (1)
Agency News (1)
Date
Headline
08/21/2018
Report Writer Tutorial
View All
Follow Up List (0)
Client ID
Type
Date
Time Remaining
View All
Customize Home Page Dashboard
Legal Notices

Section 1: Searching for a Client

- 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.

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Client Search

Please Search the System before adding a New Client.

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

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

Search | Clear | 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

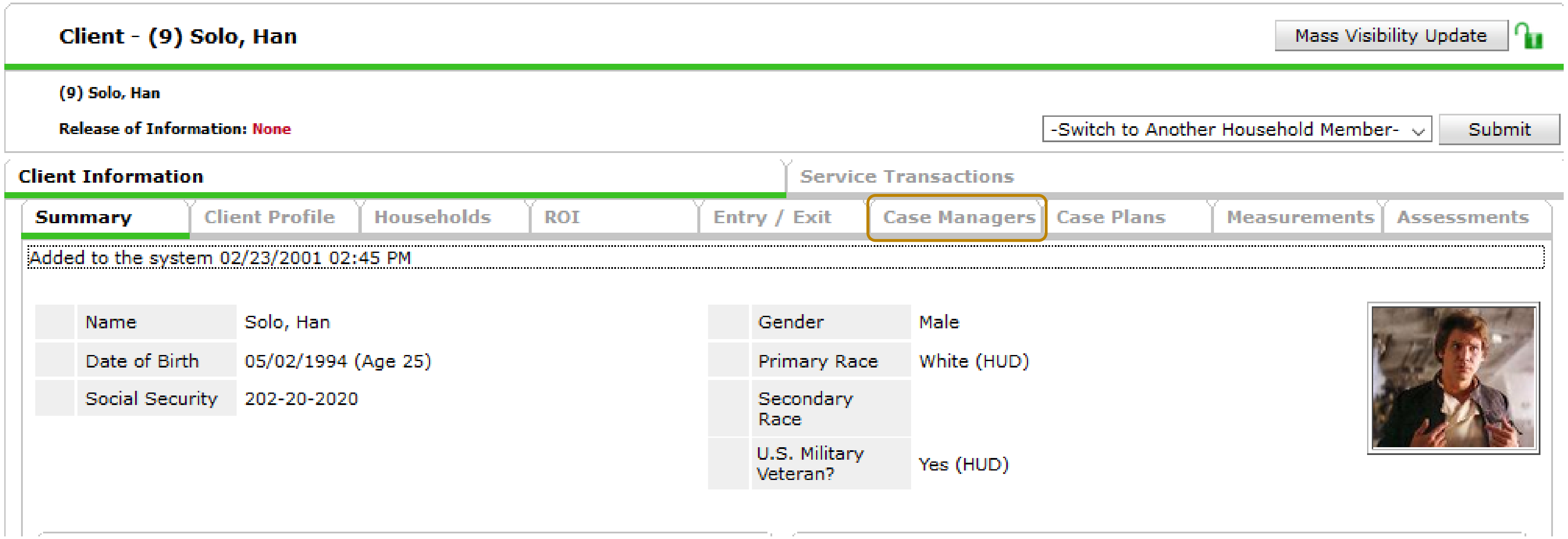

Demo
End

Section 2: Case Plans

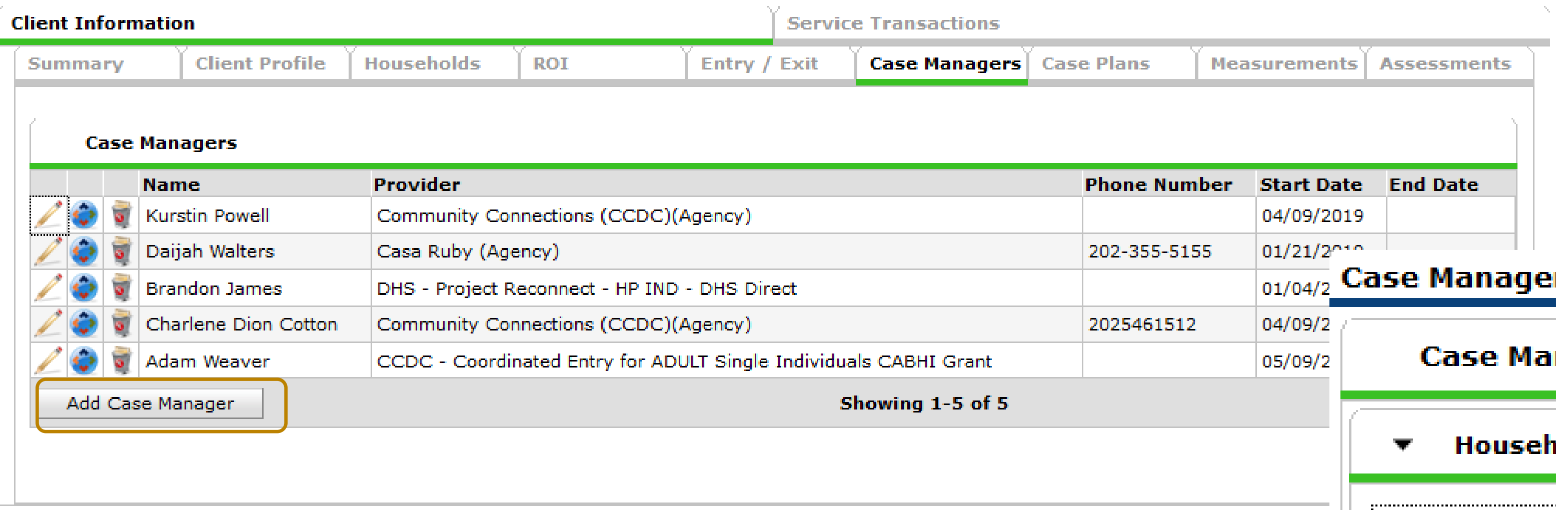
- Case Plans are required for DHS and TCP funded programs
- There are multiple parts to case plans – detailed in the following slides.

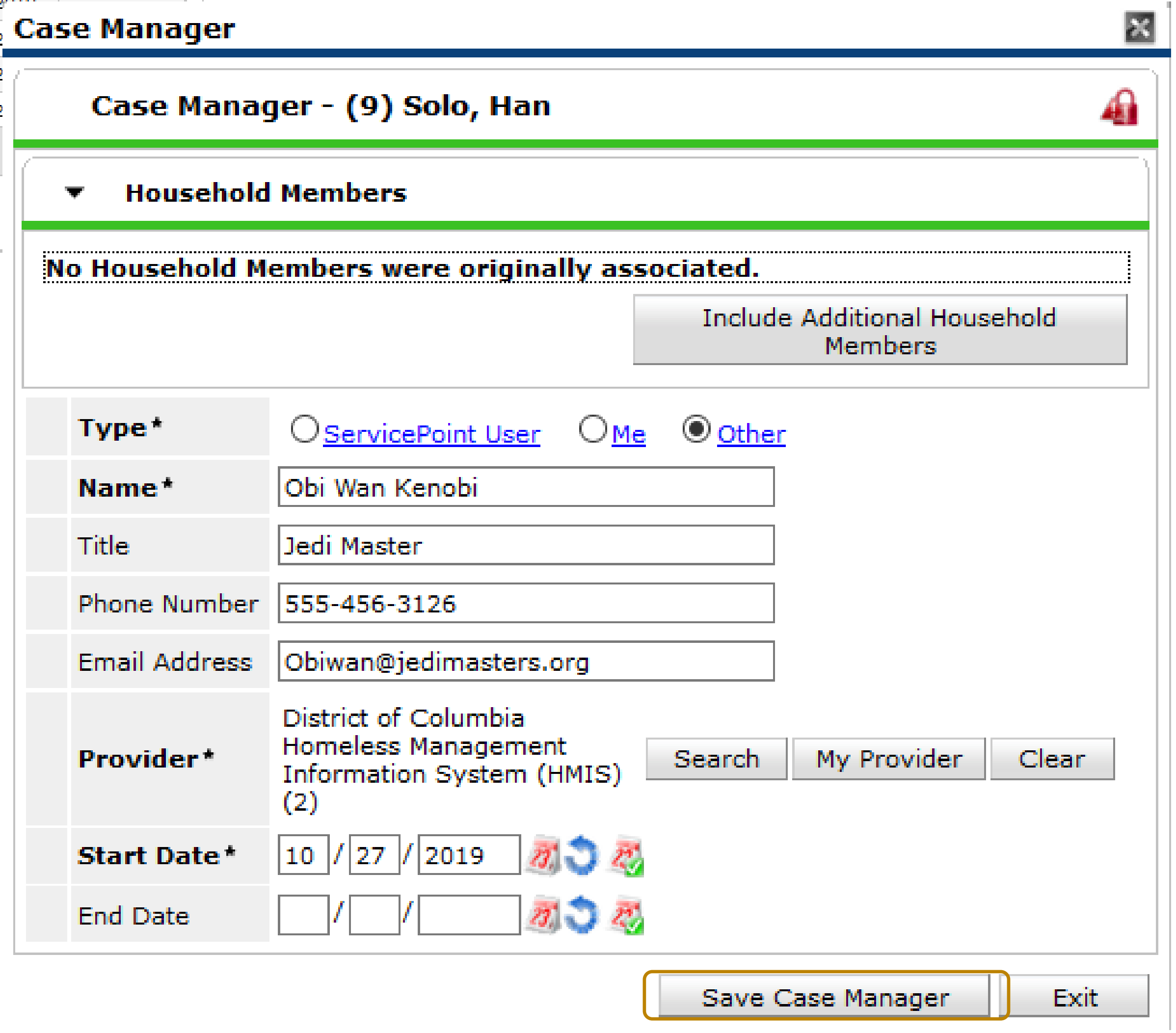
Adding a Case Manager

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



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





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

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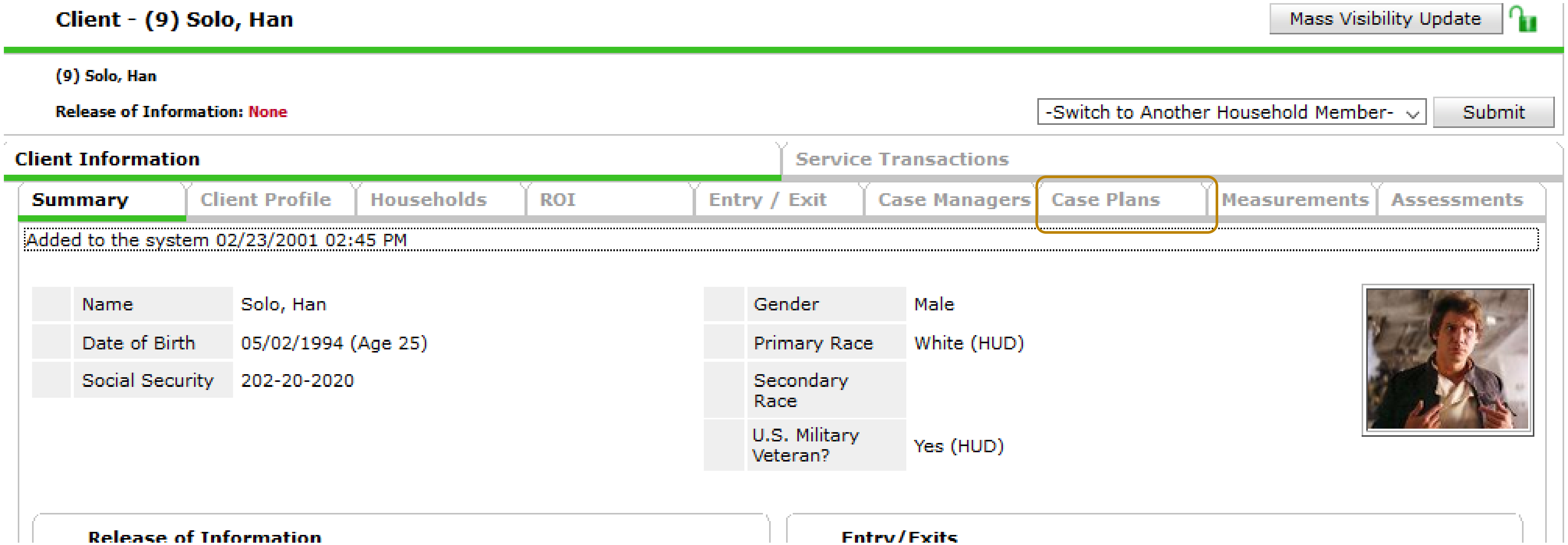


Step Two: On the Goals Screen click Add Goal:

Client Information | Service Transactions

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

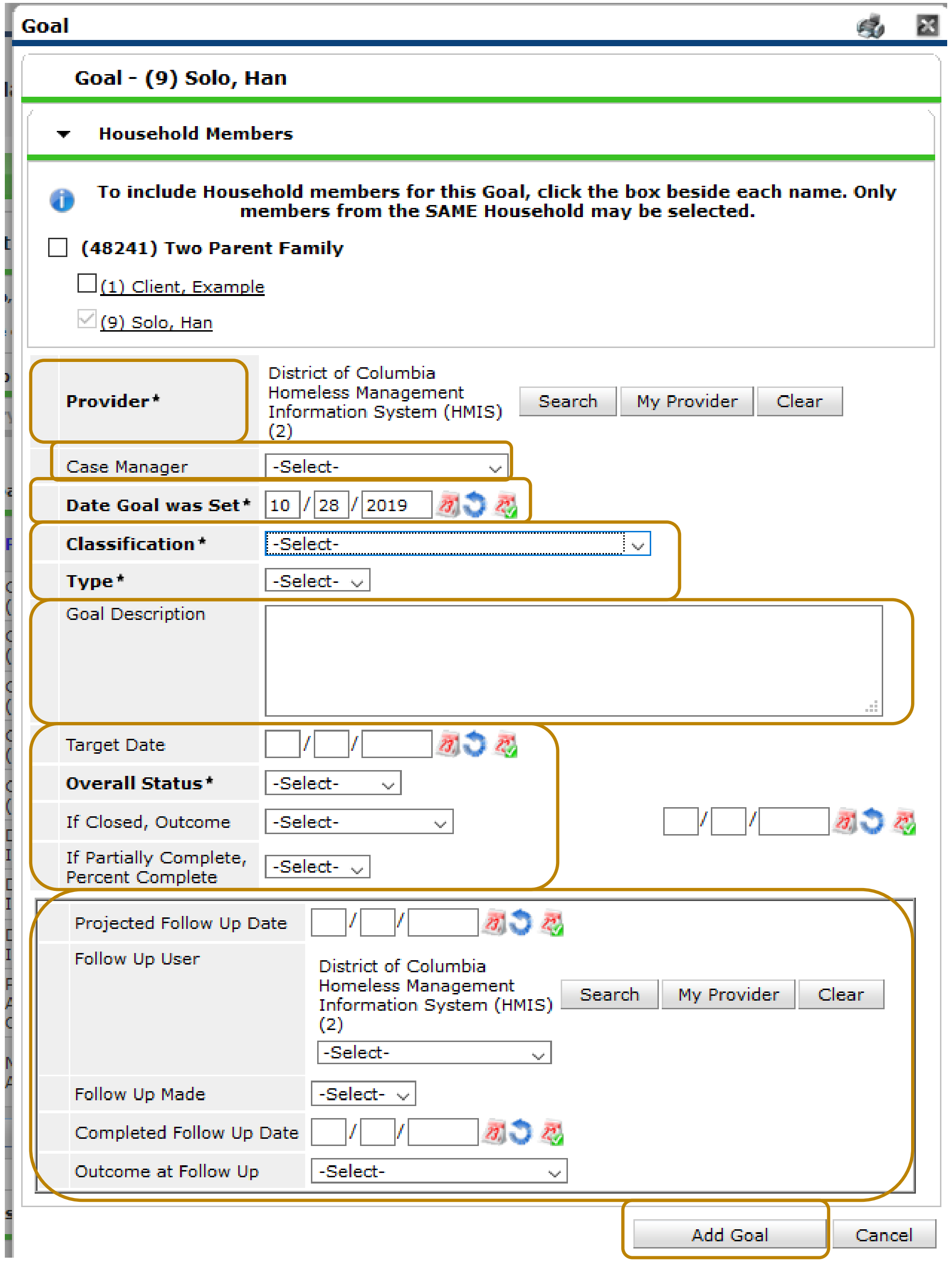
Goals

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

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

Once complete, click “Add Goal”



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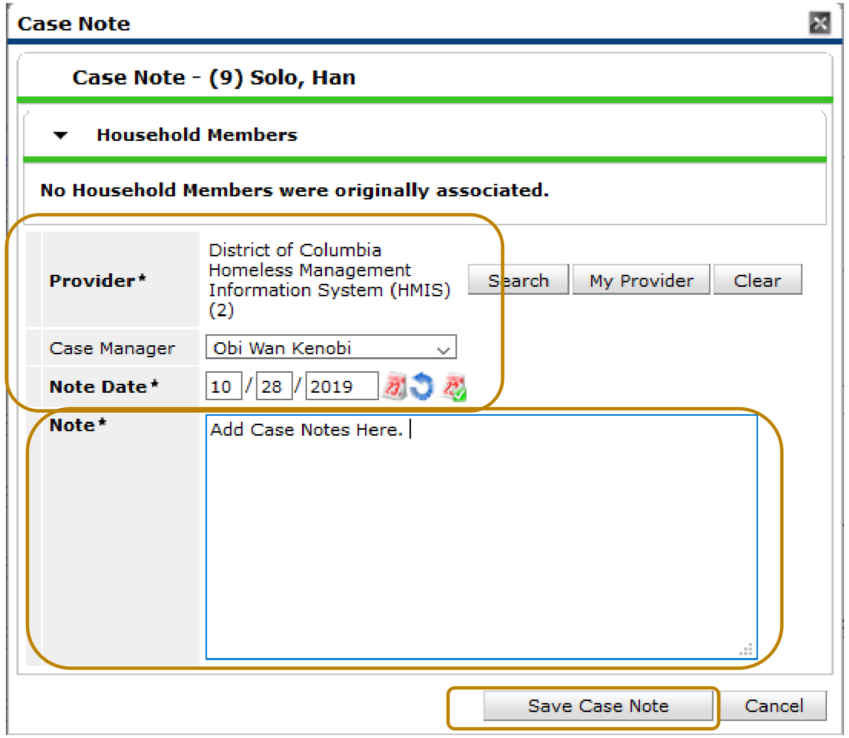
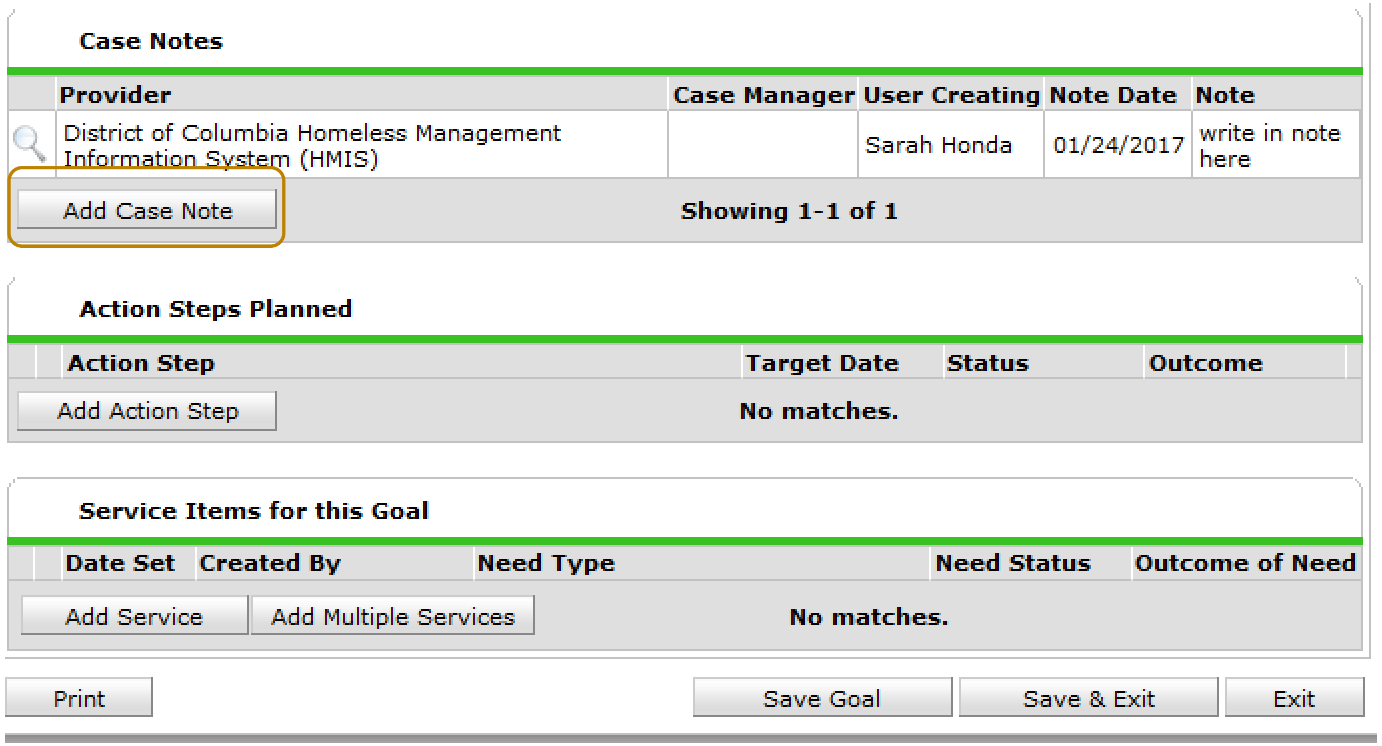
Case Notes


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


Case Notes
Provider
Case Manager
User Creating
Note Date
Note
District of Columbia Homeless Management Information System (HMIS)
Sarah Honda
01/24/2017
write in note here
Add Case Note
Showing 1-1 of 1
Action Steps Planned
Action Step
Target Date
Status
Outcome
Add Action Step
No matches.
Service Items for this Goal
Date Set
Created By
Need Type
Need Status
Outcome of Need
Add Service
Add Multiple Services
No matches.
Print
Save Goal
Save & Exit
Exit

Action Steps

Case Notes

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

Add Case Note — Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome

Add Action Step — No matches.

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need

Add Service — Add Multiple Services — No matches.

Print — Save Goal — Save & Exit — Exit

Action Step

Action Step - (9) Solo, Han

Household Members

No Household Members were originally associated.

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

Save Action Step — Cancel

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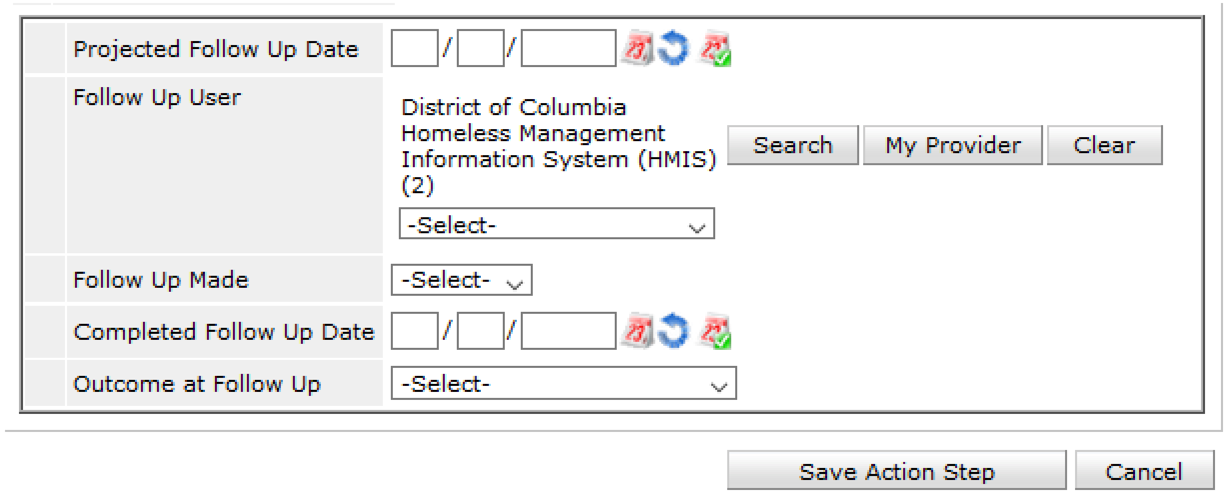
Goal Follow ups

- 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**):



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

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