

# HMIS@NCCEH

# HMIS Users Meeting

May 2020



**NC COALITION** to  
**HOMELESSNESS** end

# Agenda

## **System Updates**

Save & Verify Data

COVID-19 Response

## **How can we help?**

Point in Time/Housing Inventory Counts

Who are you – Identity in HMIS

Reporting How To's

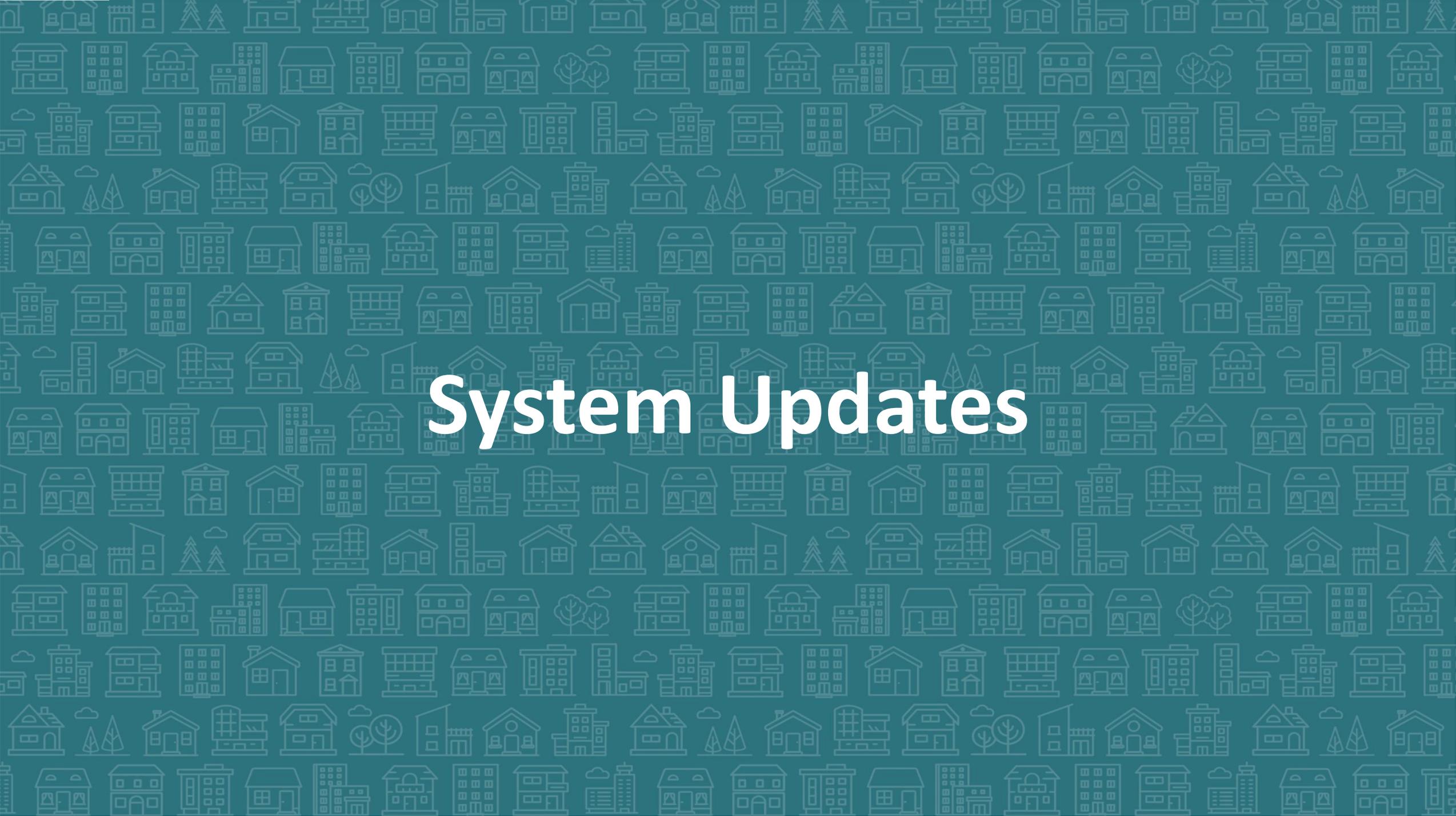
## **What's Next**



We are recording  
today's meeting



NCCEH



# System Updates

# Verify & Save – System Administrator Tool

WellSky gave us a tool to “re-stamp” older/shared data with the current provider and date. This tool is the “Verify & Save Data” button and it will improve some of our reporting visibility issues BUT overuse of it will slow down our entire system.

Only use this button after a conversation with the NCCEH Data Center!

**WARNING: Verify & Save is a System Administrator tool. Do Not Use without prior discussion with NCCEH Data Center.**

Verify and Save Data

Save

Save & Exit

Exit



NCCEH

# COVID-19 Response in HMIS

- Why Collect Data
- Sharing and Privacy Concerns
- Why these Questions
- Who to Collect and Enter Data for
- Where to Find Questions
- How to Enter Data
- Other Data Considerations



# Why Collect COVID-19 Data

Data collection is critical to our community's immediate response and future public health evaluations.

- Track COVID-19
- Protect Clients and Staff
- Advocate for Resources



# Are we allowed to share COVID-19 info?

Client privacy is both a legal and ethical obligation – and it still exists!

If a client can receive services without disclosure of COVID-19 potential or confirmed status, do not share

## *HUD's Guide to Allowable Use of Data + Limits!*

- Disclosures to avert a serious threat to health or safety
- To put this another way: Can this information lessen or prevent a threat to the client's or public's health?
- Check HUD's Guide for examples



# Why these Questions

Designed by Louisiana Balance of State, vetted by Public Health practitioners and NCCEH Natural Disaster experts, other communities implementing

**“Symptomatic” might be the only data available to homelessness services providers.**

**Provider level data collection goal:** Gathering data to support

- Real-time monitoring of COVID-19 by site
- Contact Tracing
- Calculations of site incidence, prevalence, rate of transmission and recovery rate



# Who to Collect and Enter Data For

All clients with symptoms of COVID-19

- [CDC COVID-19 Symptoms Guide](#)

HUD Guidance: [Begin screening clients for symptoms of COVID-19](#)

- Check with local Public Health authorities
- If none available, look at using the [CDC's Screening Guidance](#)



# Where to Find Questions

ClientPoint > Client Profile 11    

**Client - (11) Doo, Velma** 

 (11) Doo, Velma  
Release of Information: **None**

**Client Information** Service Transactions

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

 **Client Record** Issue ID Card

Name	Doo, Velma
Name Data Quality	Full Name Reported
Alias	
Social Security	134-71-7120
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	20

 **Client Demographics**

  
Change Clear

# Where to Find Questions



Don't see the Client Profile: all projects Assessment? Check EDA Mode!

## COVID-19 Information

Select "Yes" if client shows symptoms consistent with COVID-19. Leave blank and continue to Contact Information if not symptomatic.

Are you experiencing symptoms consistent with COVID-19 (fever, cough, shortness of breath)?	<input type="text" value="-Select-"/> <span>G</span>
When did your symptoms begin?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
When did you begin your isolation?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
When did you begin your quarantine?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
If hospitalized, what date were you admitted to the hospital?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
If known, what is the COVID-19 test result or confirmed disease status?	<input type="text" value="-Select-"/> <span>G</span>
If tested for COVID-19, when were you tested?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
If tested for COVID-19, what date were the test results provided to you?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>
What is your current symptomatic disposition?	<input type="text" value="-Select-"/> <span>G</span>
What is the date of your current symptomatic disposition?	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <span>G</span>



# How to Enter Data

## COVID-19 Information

Select "Yes" if client shows symptoms consistent with COVID-19. Leave blank and continue to Contact Information if not symptomatic.

Are you experiencing symptoms consistent with COVID-19 (fever, cough, shortness of breath)?	<input type="text" value="-Select-"/>  <b>G</b>
When did your symptoms begin?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
When did you begin your isolation?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
When did you begin your quarantine?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
If hospitalized, what date were you admitted to the hospital?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
If known, what is the COVID-19 test result or confirmed disease status?	<input type="text" value="-Select-"/>  <b>G</b>
If tested for COVID-19, when were you tested?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
If tested for COVID-19, what date were the test results provided to you?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>
What is your current symptomatic disposition?	<input type="text" value="-Select-"/>  <b>G</b>
What is the date of your current symptomatic disposition?	<input type="text"/> / <input type="text"/> / <input type="text"/>    <b>G</b>

# Continue to...

## Contact Information

- Contact Tracing is nearly impossible if a client cannot be found
- Accurate and multiple pieces of Contact Information is essential
  - Personal phone number
  - Friends/Family phone numbers
  - Frequent locations
  - Online contact information like emails or social media

## Standard Information

- Accurate Entries, Bedlists, Exits, Move-In Dates, NC County of Service are also more important than ever for baseline data and exposure tracking



# Tools available online

- Round-up for all of North Carolina on [ncceh.org/covid-19](https://ncceh.org/covid-19)
- HMIS@NCCEH specific resources on [ncceh.org/hmis/training](https://ncceh.org/hmis/training)
  - Paper Assessment Form
  - PDF Guide to COVID-19 Questions
  - PDF Guide to COVID-19 Report
  - Our Privacy Policy, HUD's Guidance on Privacy and Sharing





**How can we help?**

# Questions about Identity in HMIS

## Principles:

- Self-reported by clients
- Try to get the accurate information
- Need to Know for services
- Should not be used to deny services

These principles apply to all clients within the requirements set by HUD and other funders



## Questions about Identity in HMIS

### General Reminders

- Intakes and client interviews should in a private setting
  - Consider visual and sound barriers
- Avoid “outing” or disclosing someone’s sensitive information
  - Demographics, Disabling Conditions, DV History...
- When trust is granted by a client, confirm how far that applies
  - Just you, the agency, coordinating partners...



# Equal Access Rule<sup>1</sup>

Announced in January 2012, the Equal Access Rule codified HUD's commitment to the fair administration of its funded projects "regardless of marriage status, sexual orientation or gender identity."

The most common questions related to HMIS are around serving clients regardless of gender identity.



# Anti-Discrimination Policy

- HMIS should use the client's self-identified chosen name (It is their *real* name)
  - Whether or not their legal name has changed
- HMIS should use the client's self-identified gender identity
  - Whether or not their legal gender marker has changed



# In HMIS: First, Middle, Last Name



## **What**

Full, Accurate Name

## **Why**

To identify clients and their unique experience of homelessness

When completing paperwork or applications with the client, information should be verified for the context



# In HMIS: First, Middle, Last Name



## Collection Notes

No documentation required for HMIS

68% of transgender Americans have none of their IDs match their name and gender identity<sup>2</sup>

Procedures to change IDs and Birth Certificate vary between states

- In North Carolina, ID changes require a court order
- If a client wants to change documents, use the [National Center for Transgender Equality's ID Documents Center](#) to look up and help clients navigate the steps



# In HMIS: First, Middle, Last Name



## Collection Notes

Names have power to affirm or dismiss a person's identity

- Trans clients go by chosen names that may not be what is listed on a legal document
- Misgendering by using a trans client's birth name can be very harmful<sup>2</sup>
- All clients may request a copy of their HMIS records, including name



# Alias

## What

A non-HUD required option in HMIS that allows additional names listed

- Useful place to list 'maiden name' or previously married name if that changed
- Can also list nicknames like Flea, JLo, or Johnny
- Not for trans client's chosen name



# Gender



## What

A person's internal or innate sense of being a man, woman, both, neither or somewhere in between

## Why

Supports system planning and both local and national understanding of who is experiencing homelessness

Sometimes used for project eligibility (single gender adult-only shelters for example)



# Gender



## Collection Notes

Documentation is not necessary

Self-reported; staff observations should not be used

- Allow clients to select from the options:
  - Female
  - Male
  - Trans female
  - Trans male
  - Gender non-conforming
- Not sure how to phrase? Try, “which of these gender options best describes how you identify?”



# Tools and References

1. [HUD's Equal Access Guide for Transgender People](#)
2. [The Report of the 2015 US Transgender Survey](#) on the harm of Misgendering, lack of access to proper ID documentation
3. [National Center for Transgender Equality's ID Documents Center](#)
4. [True Colors United Public Online Courses: LGBTQ Youth Homelessness 101, Inclusion 201, Youth Collaboration 202](#)





# Point-in-Time and Housing Inventory Count

# Orange PIT/HIC

There are 8 total projects

- 5 Emergency Shelter or Transitional Housing projects (may reflect shelter projects broken into family and singles projects)
- 3 Rapid Rehousing or Permanent Supportive Housing projects



No ES/TH projects have been finalized as of today for the 0630 PIT and HIC reports.



So far 1 RRH/PSH project have been through the review & submission process with finalized 0628 HIC reports! 33% Complete!



# Reading the 0628

- Most recent report released by WellSky
- Tab A will have the count of those with a Housing Move-In Date

Prog Type	Providers Reporting Information in this Report	Adult Child		Adult Only		Child Only		Count Client Unique Id
		Count Households	Count Clients	Count Households	Count Clients	Count Households	Count Clients	
RRH	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390)	3	8	4	5	0	0	13
RRH		3	8	4	5	0	0	13
<b>Total ALL:</b>		<b>3</b>	<b>8</b>	<b>4</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>13</b>



# Reading the 0628 cont.

## What to check

- Tab F will have the total count of those in the project, Moved-In or not (this count isn't wrong just includes all clients!)
- We want to make sure everyone that has a Move-In is recorded.

<b>Prog Type</b>	<b>Providers Reporting Information in this Report</b>	<b>Client Unique Id</b>
RRH	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390)	25
RRH		25
		<b>Total ALL: 25</b>



# Reporting How To's

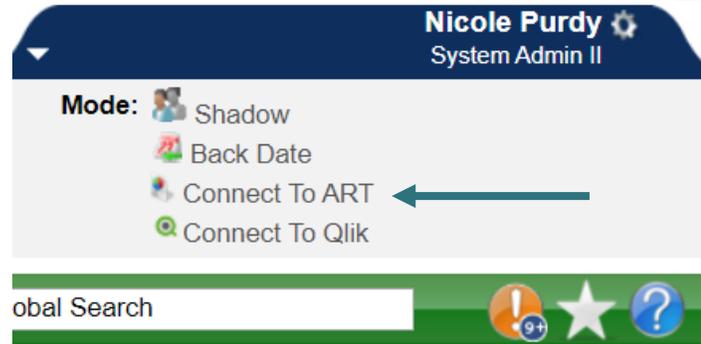
# ART vs Dashboard Reports

WellSky provides two main reporting tools that are very different. Both are useful in sometimes very different ways.

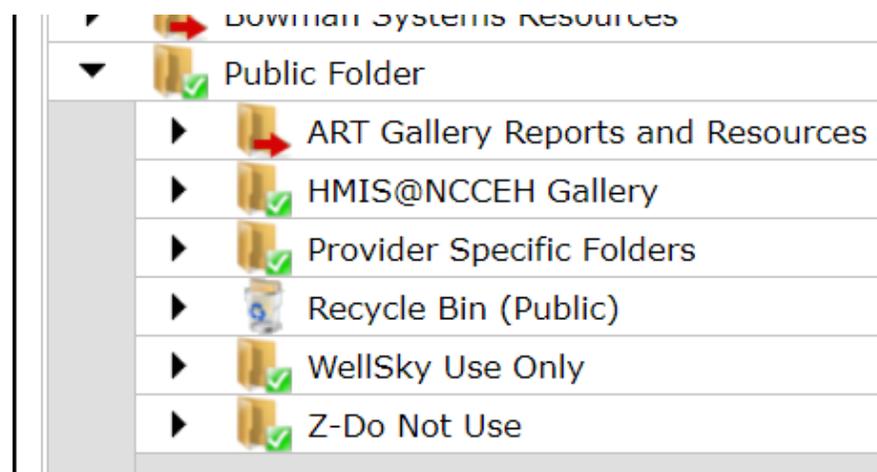
Differences	ART	Dashboard
Frequency of data updates	Overnight	Immediately
Special license required	Yes-ART license	No-anyone can use them
Formats available for output	Excel and PDF	PDF, Excel/CSV(sometimes) and live clickable tables
EDA use	Use via prompt if needed	Must EDA before running
Prompt completion	Complete via prompt box before hitting next	Complete in dashboard before hitting build report
Editable by Sys Admins	Yes, within limits	No

# How to run ART reports

- Click “Connect to ART” in upper right-hand corner of screen.



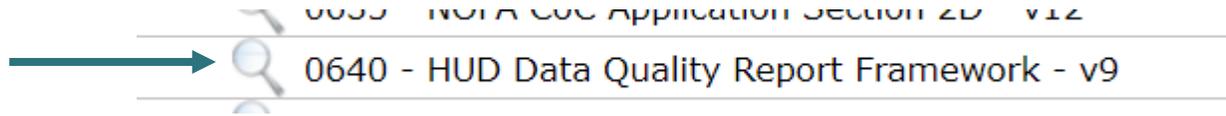
- Click black arrows to open folders in ART Browser to find appropriate report.



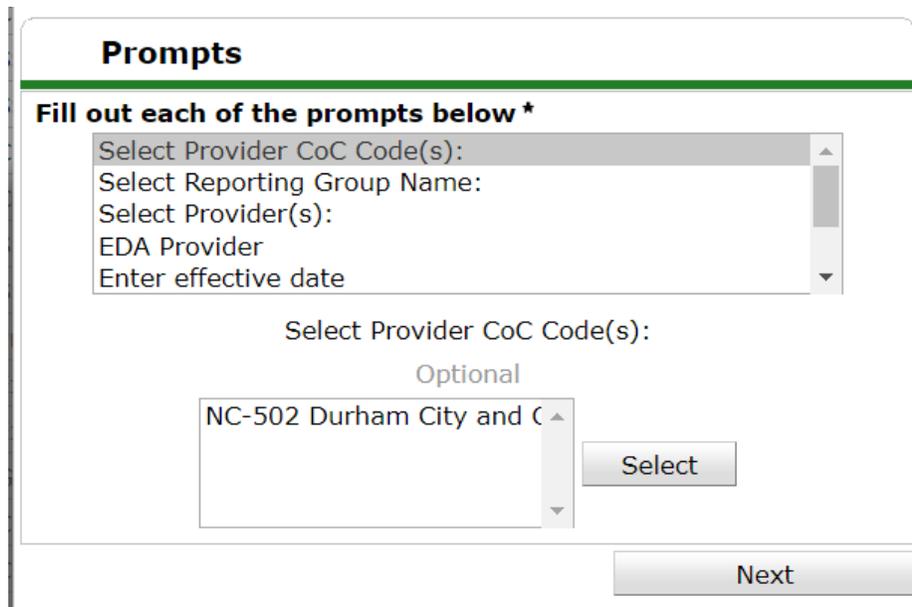
ART Gallery is WellSky reports and HMIS@NCCEH Gallery is custom reports for our site.

# How to run ART reports

- Once found click on the magnifying glass next to the report name.



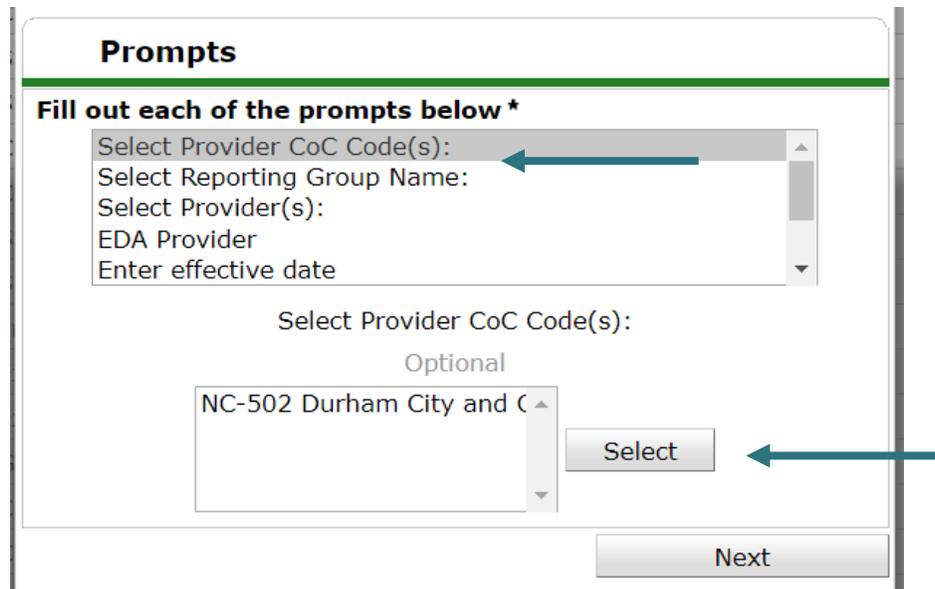
- Select “Schedule Report” and wait for prompt box to populate.



A screenshot of a "Prompts" dialog box. The dialog has a green header bar with the title "Prompts". Below the header, there is a section titled "Fill out each of the prompts below \*". This section contains a list of prompts: "Select Provider CoC Code(s):", "Select Reporting Group Name:", "Select Provider(s):", "EDA Provider", and "Enter effective date". Below these prompts, there is a dropdown menu for "Select Provider CoC Code(s):" with the text "Optional" above it. The dropdown menu is currently open, showing the selected option "NC-502 Durham City and C". To the right of the dropdown menu is a "Select" button. At the bottom right of the dialog is a "Next" button.

# How to run ART reports

- Click on prompts and then hit select to search and select or enter date as appropriate.
  - Effective Date should always be same date as the End Date prompt



**Prompts**

Fill out each of the prompts below \*

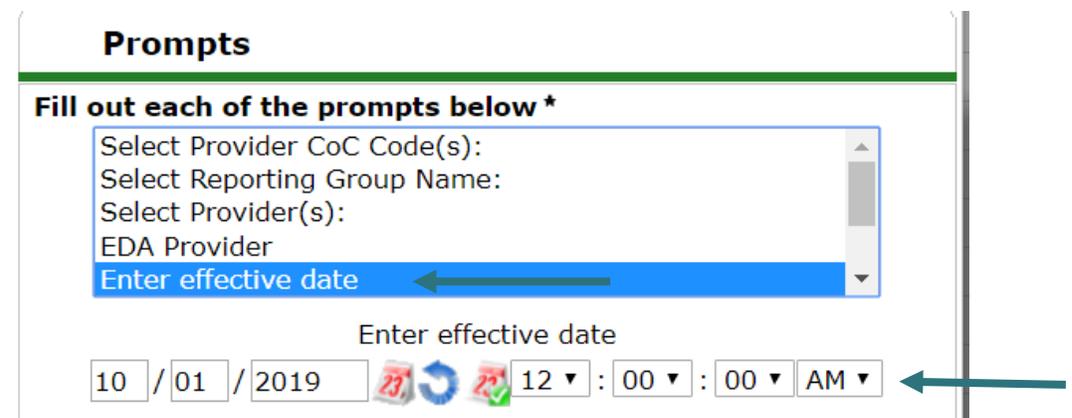
Select Provider CoC Code(s):  
Select Reporting Group Name:  
Select Provider(s):  
EDA Provider  
Enter effective date

Select Provider CoC Code(s):

Optional  
NC-502 Durham City and C

Select

Next



**Prompts**

Fill out each of the prompts below \*

Select Provider CoC Code(s):  
Select Reporting Group Name:  
Select Provider(s):  
EDA Provider  
Enter effective date

Enter effective date

10 / 01 / 2019 12 : 00 : 00 AM

Use scroll bar on the right to scroll to additional prompts. DO NOT click Next until all prompts are complete

# How to run ART reports

- Then complete schedule report details including format and interval. Change name as appropriate to differentiate between reports. Click Send.

**Schedule Report**

**Schedule**

**Name \*** Durham CoC FY 19|0640 - HUD Data

**Report Format \*** Excel

**Users Inbox \*** Nicole Purdy (6812) Search My User Clear

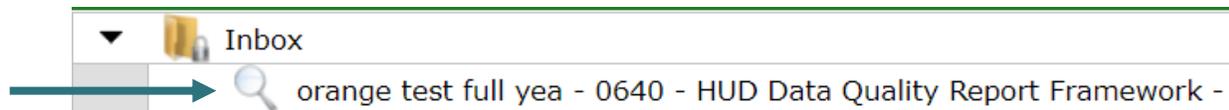
**Interval \*** Once

**Start Date \*** 04 / 10 / 2020 1 : 12 PM

**End Date \*** 04 / 10 / 2020 1 : 12 PM

Send

- Report will appear in ART inbox when completed. Click magnifying glass next to name and click download

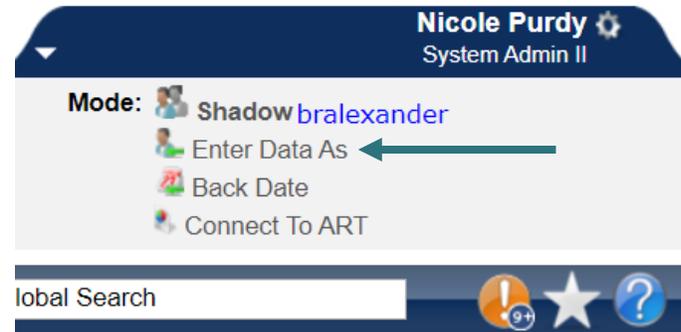


Download Send Organize Delete

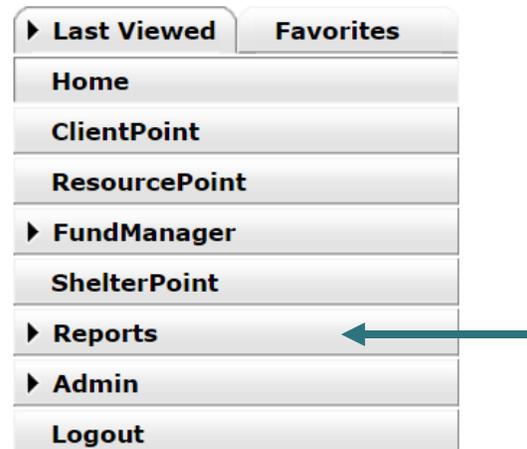


# How to run Dashboard reports

- Click “Enter Data As” in upper right-hand corner of screen to choose correct EDA mode BEFORE running the report.

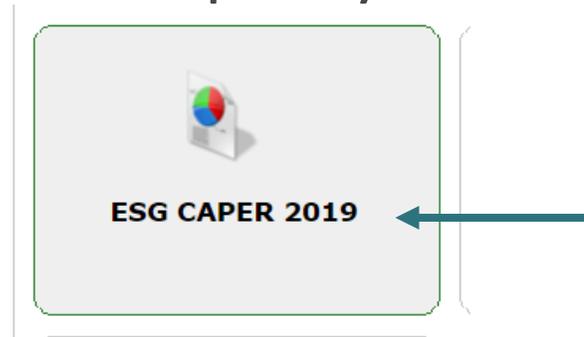


- Click “Reports” in options on the left-hand side of the screen.



# How to run Dashboard reports

- Find and click on the report you would like to run.



- Click on prompt options or enter dates as appropriate. Make sure Provider auto-populates to your EDA provider and check EDA if not.

**Report Options**

Provider Type	<input checked="" type="radio"/> <a href="#">Provider</a> <input type="radio"/> <a href="#">Reporting_Group</a>
<b>Provider *</b>	Heading Home - Rowan County - Emergency Shelter (7389) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> <input type="radio"/> <a href="#">This provider AND its subordinates</a> <input checked="" type="radio"/> <a href="#">This provider ONLY</a>
<b>Program Date Range *</b>	01 / 01 / 2019 <input type="button" value="🗓️"/> <input type="button" value="↺"/> <input type="button" value="🗓️"/> to 12 / 31 / 2019 <input type="button" value="🗓️"/> <input type="button" value="↺"/> <input type="button" value="🗓️"/>
<b>Entry/Exit Types *</b>	<input type="checkbox"/> <a href="#">Basic</a> <input type="checkbox"/> <a href="#">Basic Center Program Entry/Exit</a> <input checked="" type="checkbox"/> <a href="#">HUD</a> <input type="checkbox"/> <a href="#">PATH</a> <input type="checkbox"/> <a href="#">Quick Call</a> <input type="checkbox"/> <a href="#">RHY</a> <input type="checkbox"/> <a href="#">Standard</a> <input type="checkbox"/> <a href="#">Transitional Living Program Entry/Exit</a> <input type="checkbox"/> <a href="#">VA</a> <input type="checkbox"/> <a href="#">HPRP (Retired)</a>
<input type="button" value="Build Report"/> <input type="button" value="Download"/> <input type="button" value="Clear"/>	

# How to run Dashboard reports

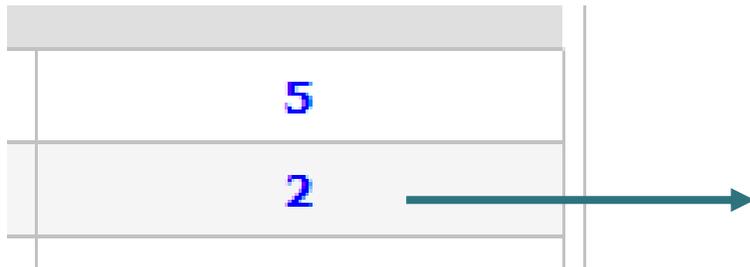
- Click Build Report and wait for data to populate.

**Report Options**

Provider Type	<input type="radio"/> <a href="#">Provider</a> <input type="radio"/> <a href="#">Reporting_Group</a>
<b>Provider *</b>	Heading Home - Rowan County - Emergency Shelter (7389) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> <input type="radio"/> <a href="#">This provider AND its subordinates</a> <input checked="" type="radio"/> <a href="#">This provider ONLY</a>
<b>Program Date Range *</b>	01 / 01 / 2019 <input type="button" value="🗓️"/> <input type="button" value="🔄"/> <input type="button" value="📅"/> to 12 / 31 / 2019 <input type="button" value="🗓️"/> <input type="button" value="🔄"/> <input type="button" value="📅"/>
<b>Entry/Exit Types *</b>	<input type="checkbox"/> <a href="#">Basic</a> <input type="checkbox"/> <a href="#">Basic Center Program</a> <input checked="" type="checkbox"/> <a href="#">HUD</a> <input type="checkbox"/> <a href="#">PATH</a> <input type="checkbox"/> <a href="#">Quick</a> <input type="checkbox"/> <a href="#">RHY</a> <input type="checkbox"/> <a href="#">Standard</a> <input type="checkbox"/> <a href="#">Transitional Living Program</a> <input type="checkbox"/> <a href="#">VA</a> <input type="checkbox"/> <a href="#">HPRP (Retired)</a> <a href="#">Entry/Exit</a> <a href="#">Call</a> <a href="#">Entry/Exit</a>
<input type="button" value="Build Report"/> <input type="button" value="Download"/> <input type="button" value="Clear"/>	

# How to run Dashboard reports

- Click on blue numbers in report to see detail, click download to download programmed format (excel, CSV, etc) or hit ctrl+p to print or save as a pdf.



5
2

**Clients in answer cell** ✕

5a - Report Validation Table

2. Number of Adults (age 18 or over)

ID	Client
481427	again, test
4	Solo, Han

Showing 1-2 of 2

[Download Results](#) [Exit](#)

# How to choose a type of Report

Key Question: Snapshot or deeper dive into data?

Use Dashboard Reports for Snapshots	
Summaries of client descriptions	“How many clients ____”
Data errors or missing	“These clients are missing ____”
Major outcomes	“Length of Stay” (Q22) and “Permanent Housing or Positive Exits” (Q23)

Use ART Reports for deeper dives	
Client responses across multiple elements	“Clients missing Annuals with deadlines in the next 30 days”
Data errors across multiple elements	“Which clients are missing ____ and ____”
More complex outcomes	“How many clients left and returned”





# What's Next?

# What's Next Calendar

Due	Report/Event Name
Jan 29 <sup>th</sup>	Point-in-Time Count night
Mar 10 <sup>th</sup>	NC State of Emergency for COVID-19
Mar 18 <sup>th</sup>	COVID-19 Response questions in HMIS
May/June	Point in Time / Housing Inventory Count Reports
Aug/Sept	Longitudinal System Analysis Report
Sept/Oct	New CE Elements required in HMIS



## Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc\_end\_homelessness 

## Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



NCCEH