

Orange HMIS User's Meeting

April 2018

The Data Center at NCCEH



North Carolina Coalition to End Homelessness

securing resources | encouraging public dialogue | advocating for public policy change

919.755.4393

www.ncceh.org

Welcome

1. Introductions
2. Privacy, ROIs, and Data Collection
3. System Performance Measures (SPM)
4. SPM Data Quality
5. Medidata updates
6. Discussion
7. What's Next
8. Q&A

Privacy, ROIs, and Data Collection

Client Release of Information

ROI must be entered to trigger security, visibility, and sharing

Every client must have an electronic ROI entered into HMIS (e-ROI)

- If only internal sharing, the signed Client Acknowledgement of Rights form is e-ROI
- If external sharing, the client indicates **if**, and **how** their data should be **shared** in NC HMIS

Release of Information (ROI) Tips

- For every client served
- Must match project name at entry (level 5)
- Good for one year
- Option to attach paper documentation to record in HMIS





Data Collection at entry

Universal Data Elements

- Name
- Social Security Number
- Date of Birth
- Gender
- Race
- Ethnicity
- Veteran Status
- Disabling Condition
- Project Entry Date
- Project Exit Date
- Destination
- Relationship to Head of Household
- Client Location
- Housing Move-In Date
- Living Situation

Required for all projects participating in HMIS, regardless of funding source

Universal Data Elements (UDE)

- Required to be collected by all projects participating in HMIS, regardless of funding source
- Establish the baseline data collection requirements for all contributing CoC projects
- Critical to federal reporting
 - AHAR, PIT, APR, CAPER, HOPWA, SSVF upload, etc.

Universal for who?

Element	Required For:
Name	All Clients
Social Security Number	All Clients
Date of Birth	All Clients
Gender	All Clients
Race	All Clients
Ethnicity	All Clients
Veteran Status	All Adults

Universal for who?

Element	Required For:
Disabling Condition	All Clients
Project Start Date	All Clients
Project Exit Date	All Clients
Destination	All Clients
Relationship to Head of Household	All Clients
Client Location	Heads of Household
Housing Move-In Date	Heads of Household
Living Situation	HoH* & Adults

*HoH = Head of Household

Name

Definition	The client's full, legal name
Collection Point	Record creation
Subject	All clients
Special Notes	<ul style="list-style-type: none">• You are not required to verify that the information provided matches legal documents• This field helps us avoid creating duplicate records for clients

Social Security Number

Definition	The 9 digit social security number assigned by the US government
Collection Point	Record creation
Subject	All clients
Special Notes	<ul style="list-style-type: none">• Not all clients will have a social security number• You are not required to verify that the information provided matches legal documents• This field helps us avoid creating duplicate records for client

Date of Birth

Definition	The month, day, and year of birth of client's served
Collection Point	Record creation
Subject	All clients
Special Notes	<ul style="list-style-type: none">• You are not required to verify that the information provided matches legal documents• This field helps us avoid creating duplicate records for client

Race

Definition	Self-reported racial category of the client
Collection Point	Record creation
Subject	All clients
Special Notes	<ul style="list-style-type: none">• Clients can select up to 5 racial categories• Staff observations should not be used to collect information on race• Responses 'Client doesn't know,' 'Client refused,' and 'Data not collected' should not be used in conjunction with any other response

Gender

Definition	Self-reported gender category of the client
Collection Point	Record creation
Subject	All clients
Special Notes	<ul style="list-style-type: none">• Includes options for trans persons, and person who do not identify with a gender• Staff observations should not be used to collect information on Gender

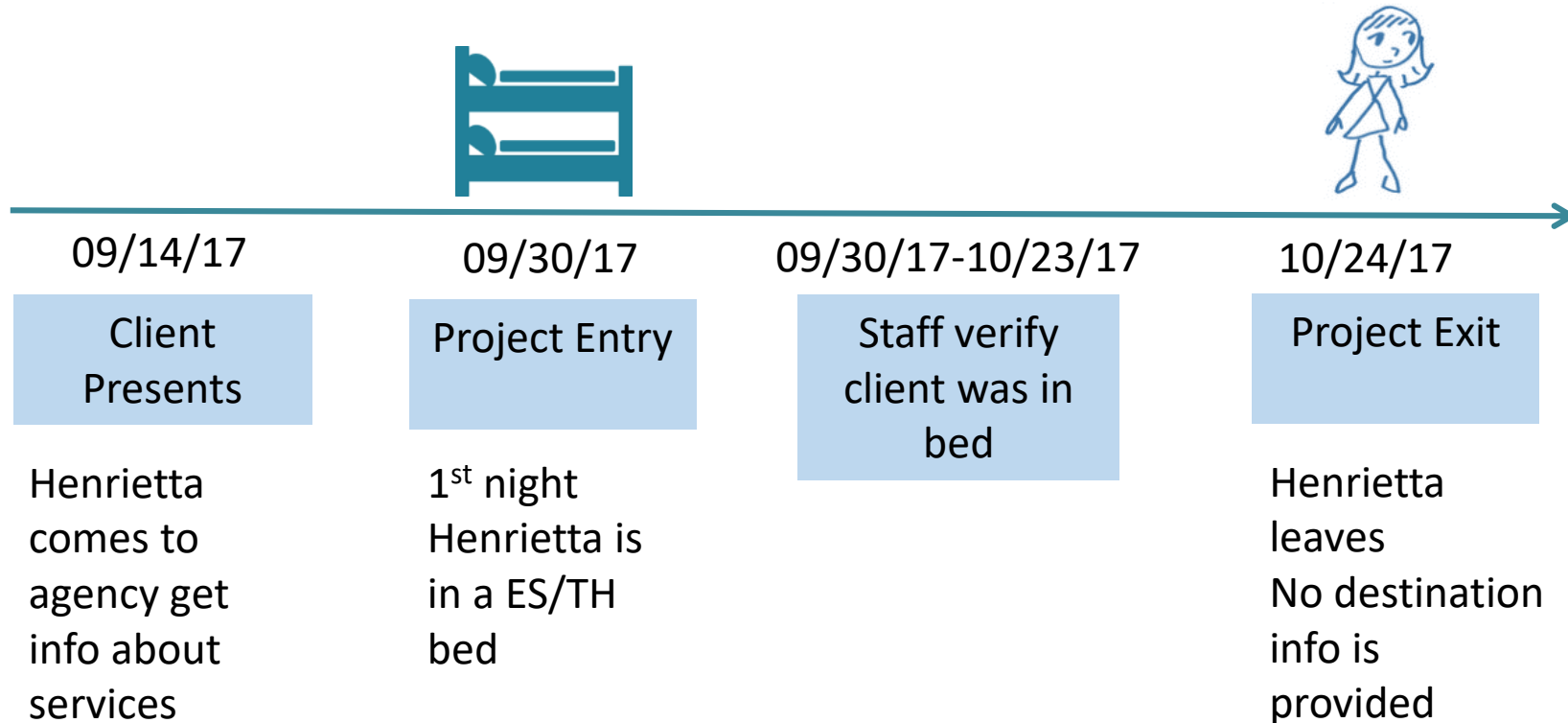
Veteran Status

Definition	Veterans of the United States armed forces
Collection Point	Record creation
Subject	All Adults
Special Notes	<ul style="list-style-type: none">• On Client Profile• This does not include inactive military reserves or the National Guard unless the person was called up to active duty• Per HUD, this should only be changed for 3 reasons:<ul style="list-style-type: none">• Client was not a veteran at project entry, and becomes a veteran during project stay• There is a true data error• A child turns 18 during a project stay

Destination

Definition	Where a client will stay just after exiting a project
Collection Point	Project Exit
Subject	All clients
Special Notes	<ul style="list-style-type: none">• If client exits without providing destination information to staff, the “No exit interview completed” response should be used

Sometimes we don't know where clients went...





This can lead to 'red flags' or null responses

When to select “No exit interview completed”

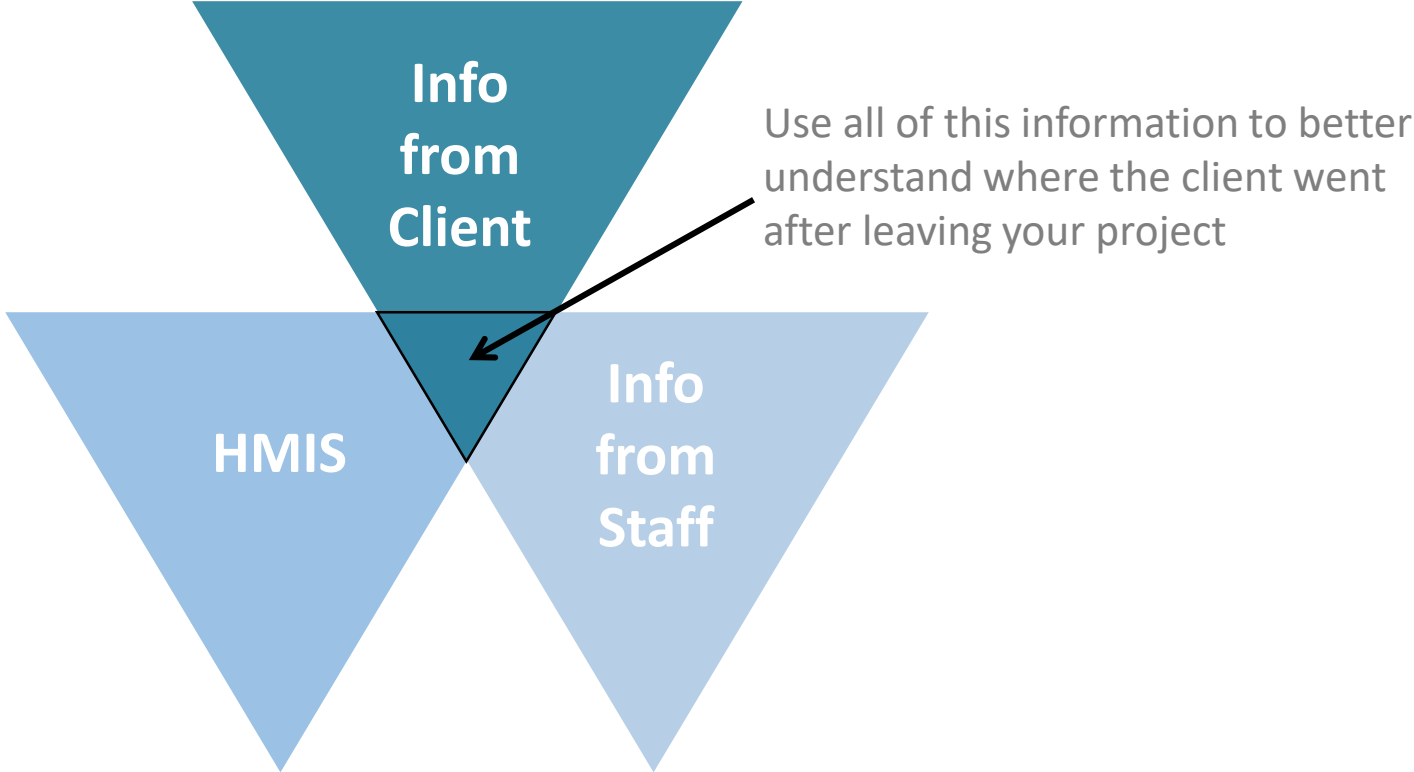
- If sources are not available—client did not provide info, staff do not have info, and there is no HMIS data

Want to use Other? Call the us at the HelpDesk first!

Do not enter record inaccurate information

- ✓ Missing data is always better than inaccurate data

HUD encourages us to get more info



Relationship to Head of Household

Definition	The relationship of household members to the head of household
Collection Point	Project Start
Subject	All clients
Special Notes	<ul style="list-style-type: none">• “Head of household” does <u>not</u> mean leader of the house<ul style="list-style-type: none">• The “primary client” or “eligible individual”• If the HoH leaves, another member of household should be designated as the HoH<ul style="list-style-type: none">• relationships to the head of household for other household members should be revised

Domestic Violence

Collection Point	Project Start
Subject	Heads of Households
Special Notes	<ul style="list-style-type: none">• If the answer is yes, then the follow-up question should be asked, “If yes, are you current fleeing?”• Currently fleeing should be indicated as “Yes” if the Person is fleeing, or is attempting to flee, the domestic violence situation or is afraid to return to their primary nighttime residence.

Client Location

Definition	A HUD-assigned CoC Code used to link project client data to the relevant CoC
Collection Point	Project Start
Subject	Head of Household
Special Notes	<ul style="list-style-type: none">• Must select the CoC code assigned to the geographic area where the HoH is staying at the time of project entry• If client moves to another CoC during project stay, CoC code must be updated

NC County of Service

Definition	The County that a client is receiving your agency's primary service
Collection Point	Project Start
Subject	All clients
Special Notes	<ul style="list-style-type: none">• Must select the County assigned to the geographic area where the clients are receiving shelter, housing, or supportive services• If client moves to another CoC during project stay, NC County of Service must be updated

Location Questions Timeline

Location Questions refer to different points in a client's life



Question in HMIS	Zip Code at Last Permanent Address	County/City of Residence the night before	HMIS Project Location and Client Location (where client is staying)
			NC County of Service (where to look for housing)
Based on the Information Date	When a client was last permanently housed	Last night (right before project start)	Today (client situation at project start)

Program Specific Data Elements

- Additional data elements (questions) are required for projects depending on their project type or funding source
 - [NC HMIS Required Data Elements](#)
- Non-Federal or non-Governmental Funders may require additional data collection

System Level Performance

Homelessness should be:

Rare

Prevent or divert new episodes of homelessness
Access resources without a shelter stay

Brief

Reduce length of time while homeless
Reduce program length of stays
Increase exits to permanent housing

Non-recurring

Reduce returns to homelessness
Focus on housing stability
Create access to resources without another shelter stay



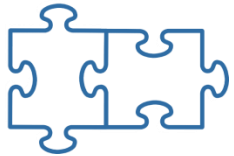
Herb Swanson/Reuters

7 measures to gauge impact



Help communities view their progress community towards preventing and ending homelessness

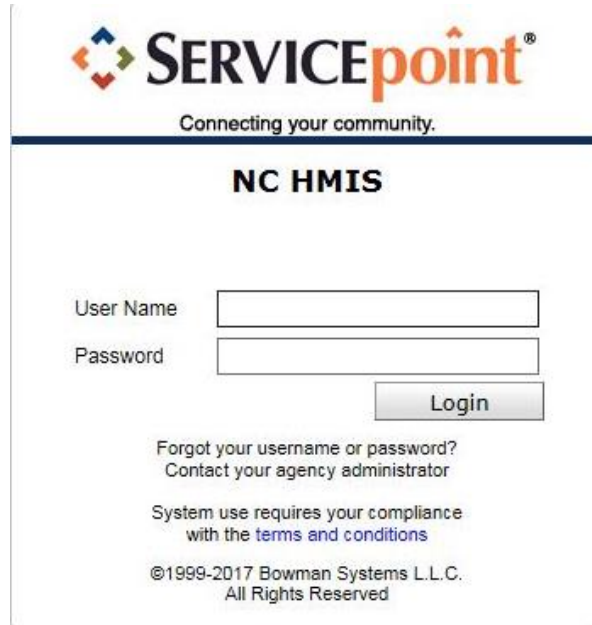
The measures are interrelated and provide a more complete picture of system performance



Identify areas for improvement, needs, gaps



SPM data is pulled from 2 places



SERVICEpoint
Connecting your community.

NC HMIS

User Name

Password

Forgot your username or password?
Contact your agency administrator

System use requires your compliance
with the [terms and conditions](#)

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HMIS

Inventory List for NC-507 - Raleigh_Wake County CoC(4)

A	B	C	D	E	F
Row	Year	Proj. Typ	Organization Name	Project Name	Geoc
2E+05	2016	PSH	CASA	Carolina Place/ 1131 Carlton	3723
3E+05	2016	ES	DORCAS	Emergency Housing	3705
2E+05	2016	RRH	Passage Home	Essential Services- (Matthew House/Millbrook Villas)	3723
2E+05	2016	PSH	CASA	Families at Home-HUD 2003 (Oak Hollow)	3723
2E+05	2016	ES	Salvation Army	Family Shelter	3723
2E+05	2016	ES	Wake Interfaith Hospitality	Family Shelter	3723
2E+05	2016	TH	Healing Transitions	GPD-Veterans Per Diem	3723
2E+05	2016	ES	Urban Ministries of Wake	Helen Wright Center	3723
2E+05	2016	RRH	Passage Home	Hollenden Place	3723
2E+05	2016	PSH	CASA	Hope Crest	3723
2E+05	2016	PSH	WCHS	Housing First Shelter + Care 2004	3723
2E+05	2016	PSH	WCHS	Housing First Shelter + Care 2007	3723
2E+05	2016	PSH	Passage Home	Jobs Journey	3723
2E+05	2016	PSH	DHIC	Lennox Chase	3723
3E+05	2016	TH	Haven House	Maternity Group Home	3723
2E+05	2016	PSH	CASA	McKinney Team Housing	3723

Housing Inventory Chart (HIC)

What HMIS client data is included?



October 1, 2014 to September 30, 2017 (36 months)



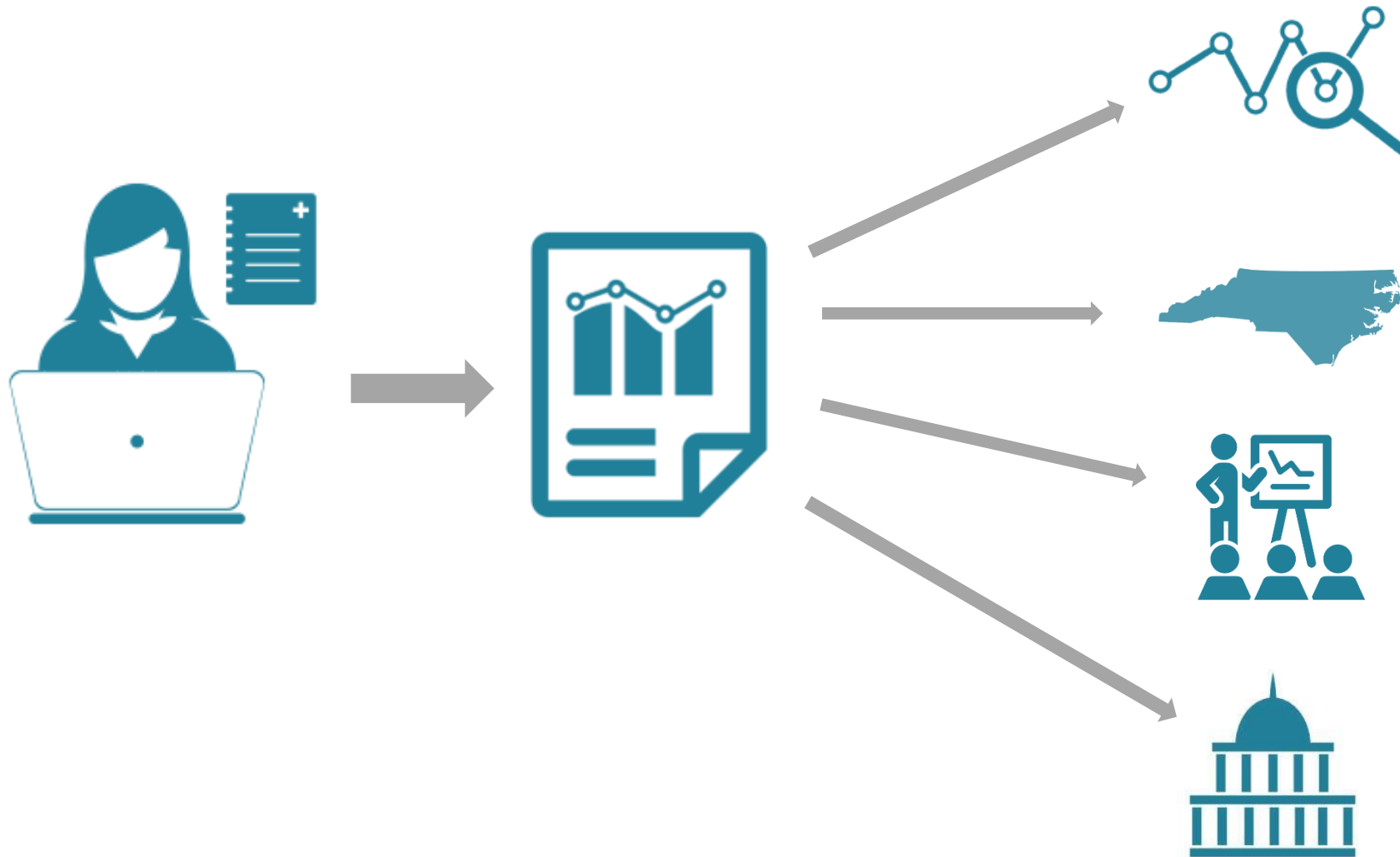
Any person who entered SO, ES, SH, TH, RRH and/or PSH during the reporting period



Data are reported for individuals and person in families

SPM data quality

Your HMIS data matters!



Important data elements for SPM

Entry Date

Date of Birth

Relationship to Head of Household

Client Location

Prior Residence

Length of stay in previous place

Approximate start date of homelessness

Number of times homeless in past 3 years

Number of months homeless in past 3 years

Income

Housing Move-in Date

Annual Assessment Date

Exit Date

Exit Destination

Data quality impacts the SPMs



Coverage

Include as many homeless service providers in the community in HMIS as possible



Utilization

Bed utilization rates must be between 65% to 105%



Data Quality

Data entry is timely
Low rate of missing data
Data reflects what is accurate
Discrepancies have been identified and addressed


Data must be cleaned prior to submission

The next slides will show the most common red flags and how to resolve them in ServicePoint

- Missing Data
- Incomplete or Conflicting Sub-assessments
- Unexited Clients



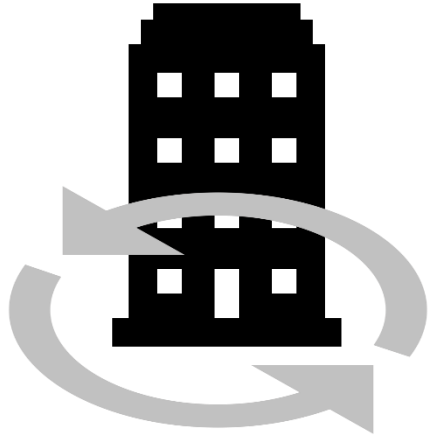
Missing data

Error information	UDEs were not pulled into HMIS report at client entry, interim and/or exit
How do I find this error? 	Run the 0640 Data Quality Framework report in ART <ul style="list-style-type: none">- Review the client detail tab Run the APR or CAPER report on Dashboard <ul style="list-style-type: none">- Review the error counts



Missing data

How do I fix this error?



Review client file for information

If information is in file, enter into HMIS using EDA and Backdate mode





Remember: Missing data is ALWAYS better than inaccurate data



Call the Data Center for SSN entry

Incomplete or Conflicting Sub-assessments

Error information	Incomplete HUD verification on disability, income, benefits and/or health insurance sub assessments
How do I find this error? 	Run the 0252 Data Completeness Report Card EE in ART - Review the client detail tab Run the APR or CAPER report on Dashboard - Review the error counts
How do I fix this error?	Review client file for documents verifying disability, income, benefits and/or health insurance  Remember: Missing data is ALWAYS better than inaccurate data



Update and annual Assessment

PART II: SUB-ASSESSMENTS

How to Change Sub-assessments

Disability, Health Insurance, Income and Non-Cash Benefits can be changed in

- Interim Updates
- Interim Annual Assessments
- Exit Assessments
- Post-Exit Follow-ups

How to Change Sub-assessments Reference Table

Previous Response	Change or Edit at Update	Action (always check EDA and Backdate)
Gateway = No	Gateway = Yes	Change dropdown to Yes
Gateway = Yes	Gateway = No	Change dropdown to No
Type/Source = No	Type/Source = Yes	Do not edit previous Type/Source. Add new Type/Source as of the Update
Type/Source = Yes	Type/Source = Yes	Edit previous Type/Source and set end-date for day before the Update. Then Add new Type/Source as of the Update
Type/Source = Yes	Type/Source = No	Edit previous Type/Source and set end-date for day before the Update. Then use HUD Verification to set Type/Source to No

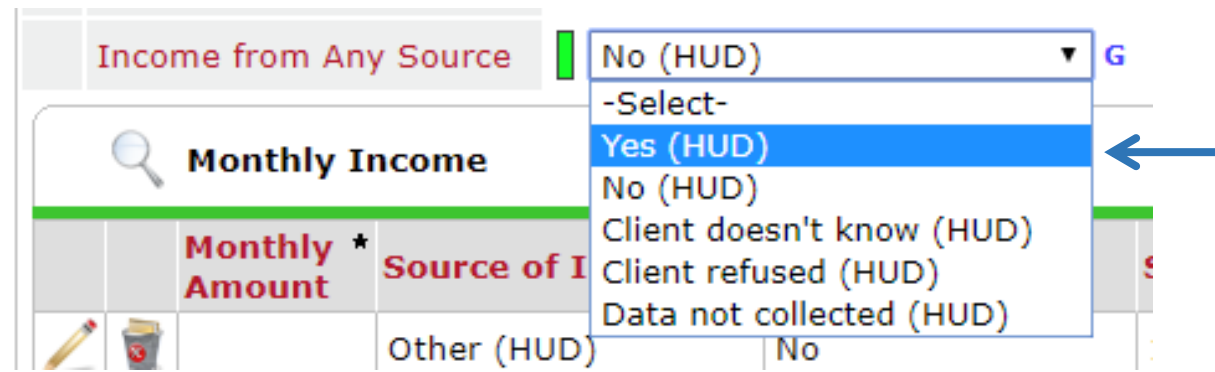
How to Change Sub-assessments

Example A

Wilson Smith has no income at project start Oct 31st, but has \$734 SSI income at your meeting on Nov 10th.

Steps to Update

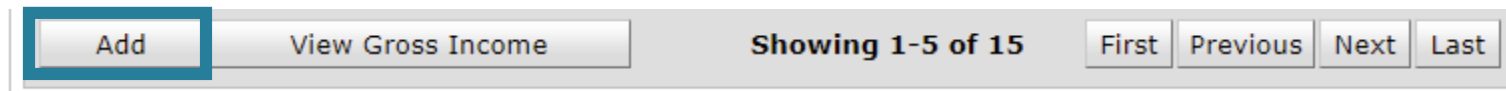
1. Use Enter Data As for the right project and Backdate to 11/10/17
2. Go to Wilson's Entry/Exit tab and Add an Interim Update
3. Update the Gateway question to Yes



The screenshot shows a software interface for data entry. At the top, there is a tab labeled "Income from Any Source". Below this, there is a search icon and the text "Monthly Income". A dropdown menu is open, showing several options: "No (HUD)", "-Select-", "Yes (HUD)", "No (HUD)", "Client doesn't know (HUD)", "Client refused (HUD)", and "Data not collected (HUD)". The "Yes (HUD)" option is highlighted in blue, and a blue arrow points to it from the right. Below the dropdown, there is a table with columns for "Monthly Amount" and "Source of Income". The "Monthly Amount" column has a red asterisk next to it. The "Source of Income" column has a red asterisk next to it. The table shows "Other (HUD)" and "No" as options.

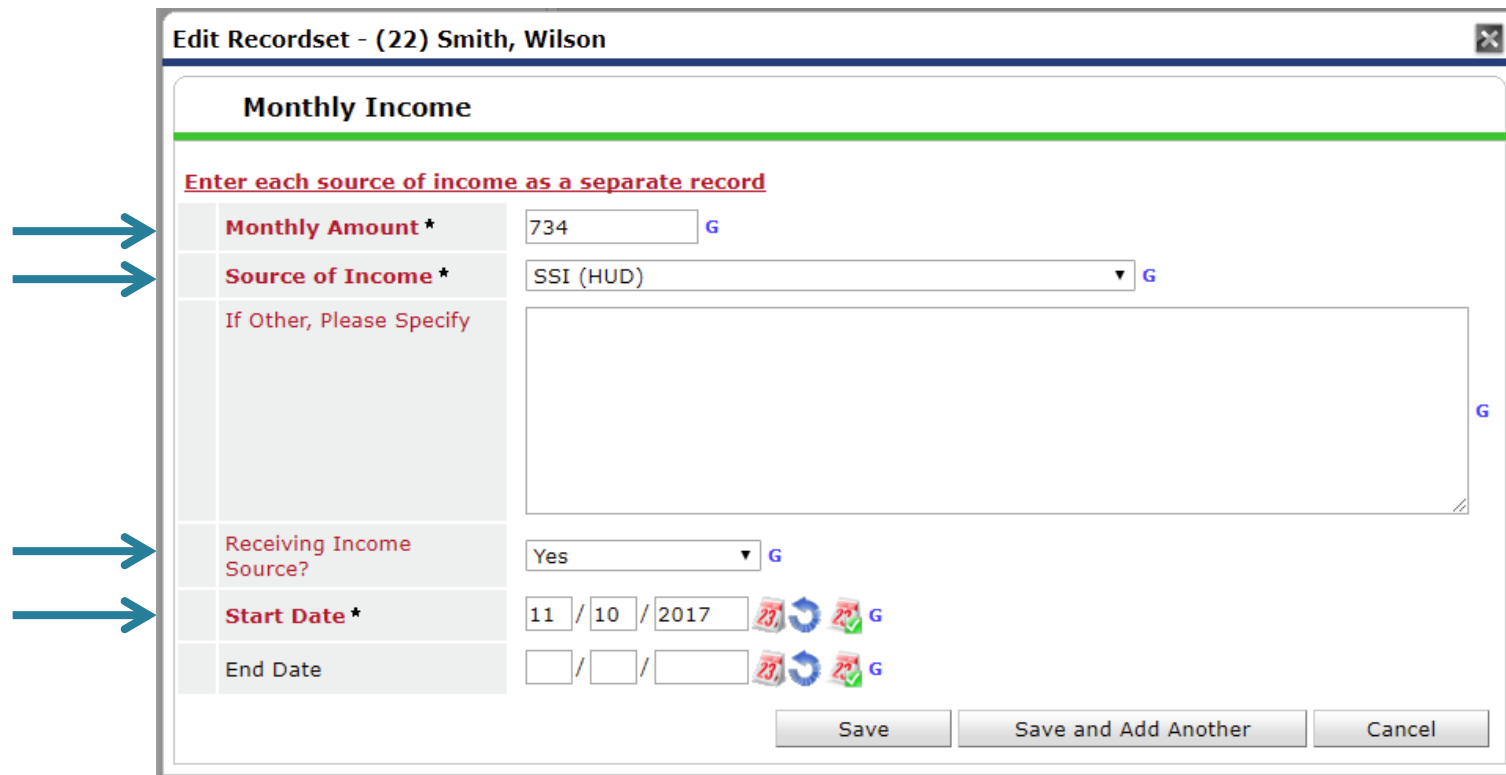
How to Change Sub-assessments

4. Click Add for a new SSI response



Toolbar with buttons: Add, View Gross Income, Showing 1-5 of 15, First, Previous, Next, Last. The 'Add' button is highlighted with a blue border.

5. Complete Income Source information



Monthly Income

Enter each source of income as a separate record

Monthly Amount *	734	G
Source of Income *	SSI (HUD)	G
If Other, Please Specify		G
Receiving Income Source?	Yes	G
Start Date *	11 / 10 / 2017	G
End Date		G

Buttons: Save, Save and Add Another, Cancel

Blue arrows point to the 'Monthly Amount', 'Source of Income', and 'Start Date' fields.

How to Change Sub-assessments

- Now check that the Gateway, Sources and HUD Verification all align and are correct

****ANSWER FOR HEAD OF HOUSEHOLD AND ADULTS****

Total monthly income G

Income from Any Source Yes (HUD) G

Monthly Income HUD Verification

		Monthly Amount *	Source of Income *	Receiving Income Source?	Start Date *	End Date
		US\$734.00	SSI (HUD)	Yes	11/10/2017	
			Other (HUD)	No	10/31/2017	
			Worker's Compensation (HUD)	No	10/31/2017	
			VA Non-Service Connected Disability Pension (HUD)	No	10/31/2017	
			Unemployment Insurance (HUD)	No	10/31/2017	

Add View Gross Income Showing 1-5 of 16 First Previous Next Last

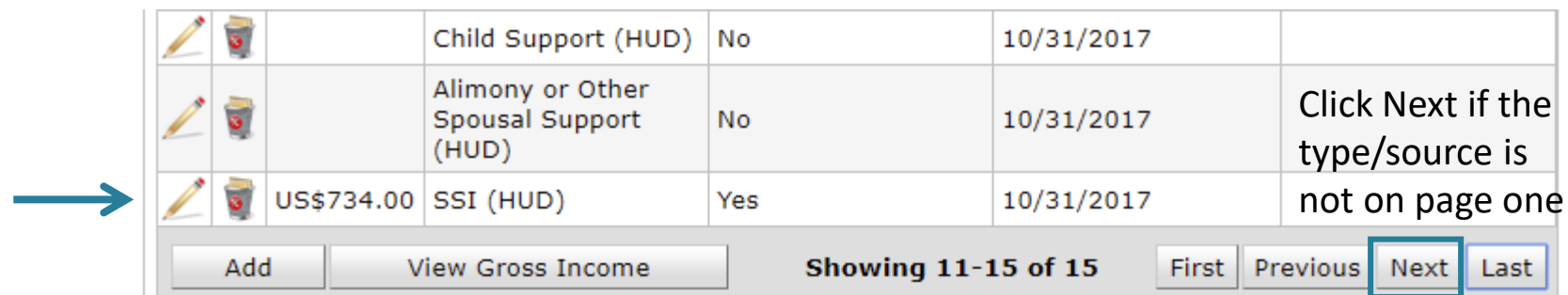
How to Change Sub-assessments







Example B

John Smith is receiving \$734 SSI income at project start Oct 31st, but his SSI income has increased to \$786 at your meeting on Nov 10th.

Steps to Update

1. Use Enter Data As for the right project and Backdate to 11/10/17
2. Go to John's Entry/Exit tab and Add an Interim Update
3. Find the SSI Income Source and click the pencil icon to edit



			Child Support (HUD)	No	10/31/2017	
			Alimony or Other Spousal Support (HUD)	No	10/31/2017	Click Next if the type/source is not on page one
		US\$734.00	SSI (HUD)	Yes	10/31/2017	Click Next if the type/source is not on page one

Add View Gross Income Showing 11-15 of 15 First Previous **Next** Last

How to Change Sub-assessments

4. Set the end-date to the day before the Backdate mode, Nov 9th

The screenshot shows a software window titled "Edit Recordset - (123) Smith, John". The main section is "Monthly Income" with a sub-instruction: "Enter each source of income as a separate record". The form contains the following fields:

- Monthly Amount ***: 734 G
- Source of Income ***: SSI (HUD) G
- If Other, Please Specify**: (Empty text area) G
- Receiving Income Source?**: Yes G
- Start Date ***: 10 / 31 / 2017 G
- End Date**: 11 / 09 / 2017 G

At the bottom of the form are buttons: "Print Recordset", "Save", "Save and Add Another", and "Cancel". A blue arrow points to the "End Date" field, and a blue box highlights the "Save" button.

5.

The navigation bar contains the following elements:

- Add** (highlighted with a blue box)
- View Gross Income**
- Showing 1-5 of 15**
- First**
- Previous**
- Next**
- Last**

How to Change Sub-assessments

6. Complete Income Source information

Add Recordset - (123) Smith, John

Monthly Income

Enter each source of income as a separate record

Monthly Amount *	<input type="text" value="786"/> G
Source of Income *	<input type="text" value="SSI (HUD)"/> G
If Other, Please Specify	<input type="text"/> G
Receiving Income Source?	<input type="text" value="Yes"/> G
Start Date *	<input type="text" value="11"/> / <input type="text" value="10"/> / <input type="text" value="2017"/> G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/> G

How to Change Sub-assessments

- Now check that the Gateway, Sources and HUD Verification all align and are correct

****ANSWER FOR HEAD OF HOUSEHOLD AND ADULTS****

Total monthly income G

Income from Any Source Yes (HUD) G

Monthly Income HUD Verification

	Monthly Amount *	Source of Income *	Receiving Income Source?	Start Date *	End Date
	US\$786.00	SSI (HUD)	Yes	11/10/2017	
		Other (HUD)	No	10/31/2017	
		Worker's Compensation (HUD)	No	10/31/2017	
		VA Non-Service Connected Disability Pension (HUD)	No	10/31/2017	
		VA Service Connected Disability Compensation (HUD)	No	10/31/2017	

Add View Gross Income Showing 1-5 of 16 First Previous Next Last



Unexited clients

Error information	Missing project exit date for clients no longer receiving services
How do I find this error?	Run the 0216 Unexited Clients Exceeding Max Length of Stay report Run the APR or CAPER - Review Question 22 Length of Participation (in days)



Unexited clients

How do I fix this error?









Review client file, consult with other staff to get information about date of client exit

Exit client from project using Enter Data As and Backdate mode

Overlap in different projects

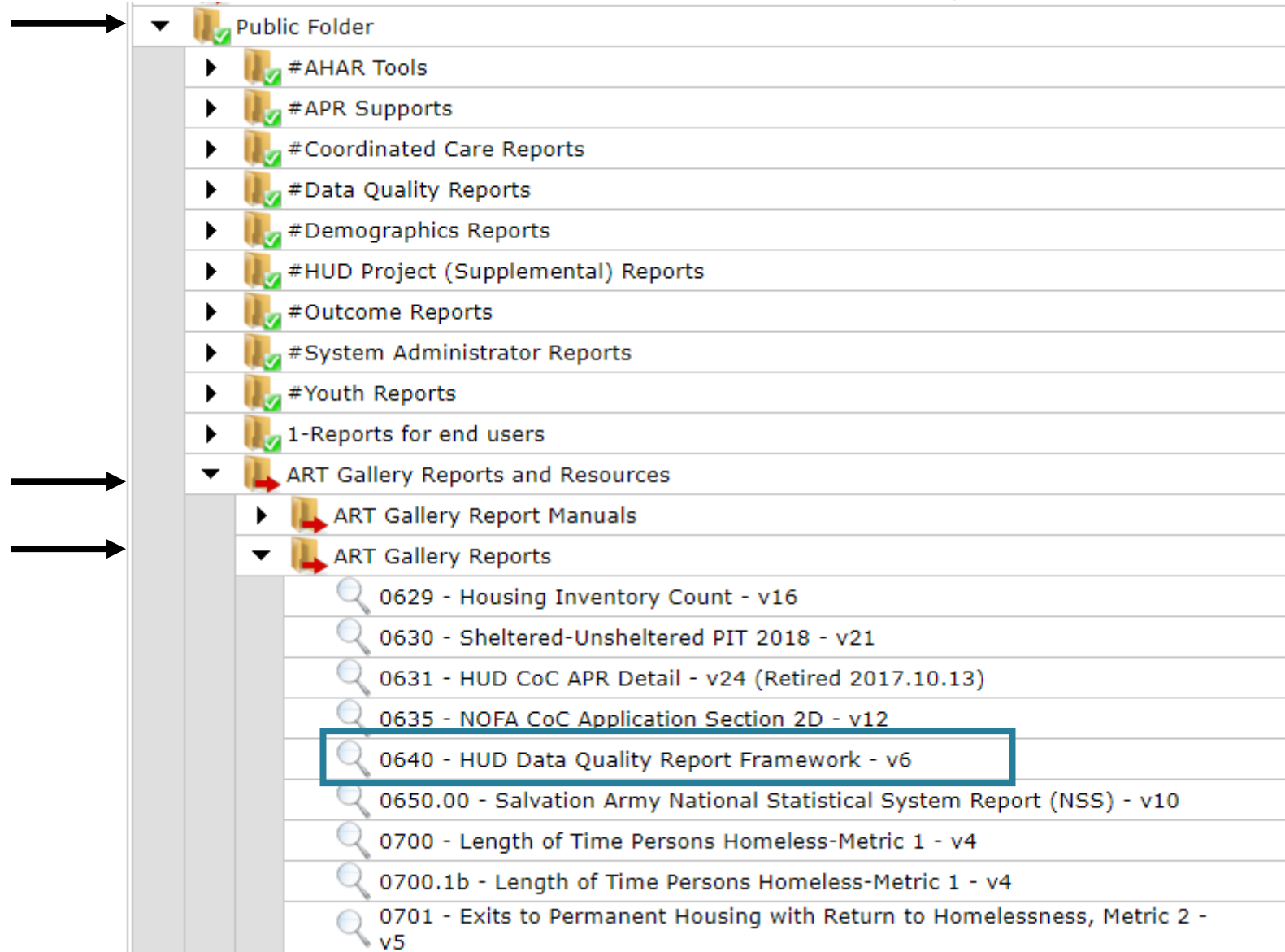
Overlapping start dates

- Among different projects

Entry / Exit					
	Program	Type		Entry Date	Exit Date
	Wisteria Way Housing- Lee County -TH (5551)	HUD		08/04/2017	 08/07/2017
	Heading Home Housing - Rowan County - Emergency Shelter - State ESG (7124)	HUD		08/01/2017	 08/06/2017

Showing 1-2 of 2

Where can I find the 0640 Report?



Schedule the 0640 Report

ART Item Details ✕

0640 - HUD Data Quality Report F...

Name	0640 - HUD Data Quality Report Framework - v6
Description	This report is a HUD CoC APR Data Quality and Completeness monitoring tool for the upcoming 2015 version of
Creation Date	2018-01-13 12:47
Update Date	2018-03-28 14:14
Type	Webi
Owner	Administrator

[View Report](#) [Edit Report](#) [Schedule Report](#)

0640 Report Prompts

ART Report

Prompts

Fill out each of the prompts below *

Select Provider(s):	→
Select Provider CoC Code(s):	→
Select Reporting Group Name:	→
EDA Provider	→
Enter effective date	→
Enter Start Date:	→
Enter End Date PLUS 1 Day:	→

Select your specific project(s)

Leave blank

Leave blank

Select your specific project or leave as default

Enter your End date + 1

Enter your Start date

Enter your End date + 1

Select Provider(s):

Optional

<input type="text"/>	Select
----------------------	--------

Mediware update

Software Update

AIRS codes updated

ART Reports getting updates:

- 0640 – HUD Data Quality Framework report
- 0701 – Exits to Permanent Housing with Return to Homelessness, Metric 2
- 0706 – Permanent Housing Placement-Retention, Metric 7
- 0252 – Data Completeness Report (EE)

What's Next?

HMIS @NCCEH Update

A new Homeless Management Information System at the North Carolina Coalition to End Homelessness will be launched in early June 2018!

This new HMIS is being created to better meet the needs identified by NCCEH and these CoCs.

What Should I Expect?

- New and improved training, workflows and forms
- A new ServicePoint website URL

What Should I Do Now?

- Keep entering data into NCHMIS until notified to stop – we'll notify in June.
- Stay informed! We'll send out communication with FAQs and more info soon.
- Ask us questions! Contact Ben Bradley, NCCEH Project Specialist (Ben@ncceh.org) if you have any questions. If needed, he'll schedule time for you to speak with Denise Neunaber, NCCEH Executive Director.

Upcoming Deadlines and Events

Due	Report Name
March - April	PIT/HIC System Performance Measures
April 26	Entry/Exit Training 1 pm – 4 pm in Durham
April 30-May 1	Bringing it Home: Ending Homelessness in NC Conference
May 21	Next Orange HMIS Users Meeting 1:45 pm – 2:45 pm
May 7-May 25	RHY Grantee Submission
June 18	Orange HMIS Users Meeting

Data security depends on all of us



Do not leave your computer logged in & unattended



Do not share passwords



Alert us when staff with access to HMIS leave your agency

ncceh.org/hmis

access local support for Balance of State, Wake, Durham, & Orange CoCs

919.410.6997 or **hmis@ncceh.org**

helpdesk for local support



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change

919.755.4393

www.ncceh.org