

# Orange HMIS Users Meeting

January 2019



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

# January's Agenda

**HMIS@NCCEH Launch update**

**Income and Non-Cash Benefits**

What do we have to confirm for HUD?

**Longitudinal System Analysis (LSA) Update**

**Keeping an eye on your HMIS**

What are best practices for staying on top of your data?

**What's Next Calendar**

A small, light blue map of North Carolina is positioned to the left of the text. The map shows the state's outline with a darker blue square highlighting a specific region in the western part of the state.

# HMIS@NCCEH Launch

# HMIS@NCCEH Launch Update

## **Launch Date?**

No, not yet.

## **How to prepare?**

Keep collecting and entering data! Keep an eye out for new agreements to be sent via DocuSign emails

## **What is NCCEH doing?**

Reviewing the demo site (the test run of the NC HMIS copy) for Quality Assurance. Many previous issues corrected, some new issues found.



# Income and Non-Cash Benefits

# Income and Non-Cash Benefits

## **HUD's guidance:**

Collect information accurate on the day of the interview (Project Start, Update, or Exit)

Do not record past or future data here

Ask clients to respond to each potential source of income or benefits

No documentation needed (for HMIS)



# Income and Non-Cash Benefits

## **HUD's guidance:**

### Stick to the sources listed

- Lump sum amounts received by a family, such as inheritances, insurance settlements, or proceeds from sale of property, or back pay from Social Security are considered assets, not Income
- Non-Cash Benefits is intended to identify regular, recurrent benefits, not services and/or gifts such as phone cards and vouchers provided by a project



# Income Sources



Source of Income	
Earned income (i.e., employment income)	Traditional jobs (est. including tips) , contract work, irregular work such as day labor
Unemployment Insurance	Formal benefits from the NC Division of Employment Security
Supplemental Security Income (SSI)	Social Security Administration assistance for clients with disabilities OR over 65 based on financial need
Social Security Disability Income (SSDI)	Social Security Administration assistance for clients with disabilities who are “insured” - have worked long enough and paid into Social Security taxes
VA Service-Connected Disability Compensation	Tax-free payment to Veterans who have a disability because of military service (or made worse by service)
VA Non-Service-Connected Disability Pension	Veterans and survivors who are eligible for VA Pension and require help due to a disability
Private disability insurance	Market rate income insurance
Worker’s Compensation	Employer insurance provided wage replacement





# Income Sources



Source of Income	
Temporary Assistance for Needy Families (TANF)	Called Work First Family Assistance in North Carolina
General Assistance (GA)	Called Work First Cash Assistance in North Carolina
Retirement Income from Social Security	Traditional monthly assistance to protect against outliving savings
Pension or retirement income from a former job	Benefits from previous employers
Child support	Court-ordered payments to a parent
Alimony or other spousal support	Court-ordered payments to a former spouse
Other source	Please specify if you think a client has a source of income not referenced above



# Non-Cash Benefits



## Source of Non-Cash Benefits

Supplemental Nutrition Assistance Program (SNAP)	Previously called food stamps and is the largest program in the domestic hunger safety net
Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	Food and Nutrition Services from USDA for low-income pregnant, breastfeeding, and non-breastfeeding postpartum women, and to infants and children up to age five
TANF Child Care services	Child Care subsidies from NC's Work First (TANF) program
TANF transportation services	May not apply to NC
Other TANF-funded services	Anything else!
Other source	Please specify if you think a client has a source of non-cash benefits not referenced above



# What else?

Are there situations that have come up that are not covered here?





# Update and annual Assessment

PART II: SUB-ASSESSMENTS

# How to Change Sub-assessments

After the initial snapshot of a client at Project Start, Health Insurance, Income and Non-Cash Benefits can be changed in these locations

- 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



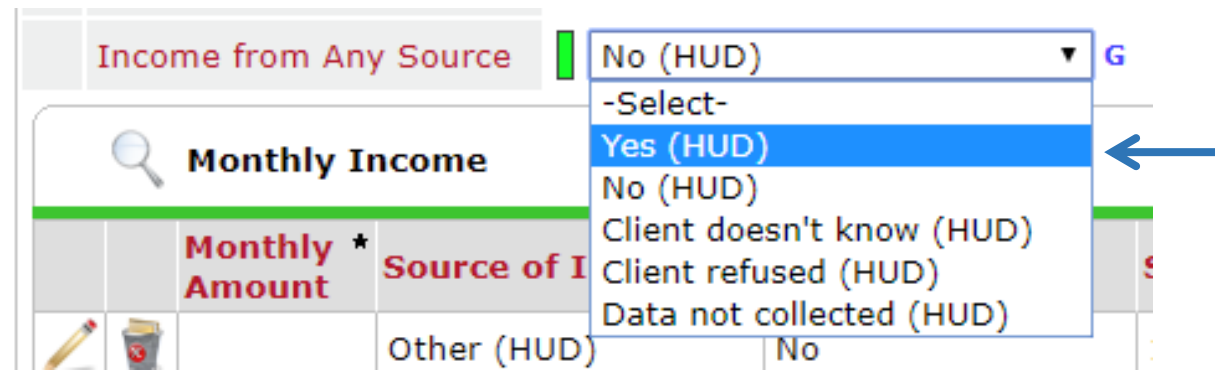
# How to Change Sub-assessments

## Example A

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

## 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

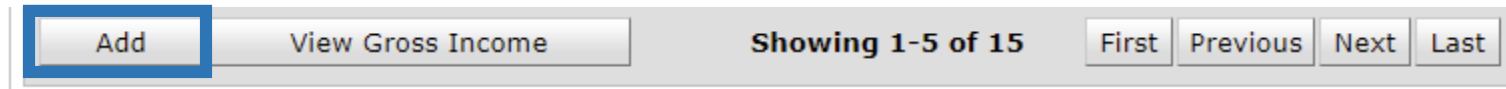


The screenshot shows a software interface for data entry. At the top, there is a tab labeled "Income from Any Source". Below it is a search bar with a magnifying glass icon and the text "Monthly Income". A dropdown menu is open, showing a list of options: "No (HUD)", "-Select-", "Yes (HUD)", "No (HUD)", "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 "Source of Income" column has a dropdown menu open with "Other (HUD)" and "No" visible.

Monthly Amount	Source of Income
	Other (HUD)
	No

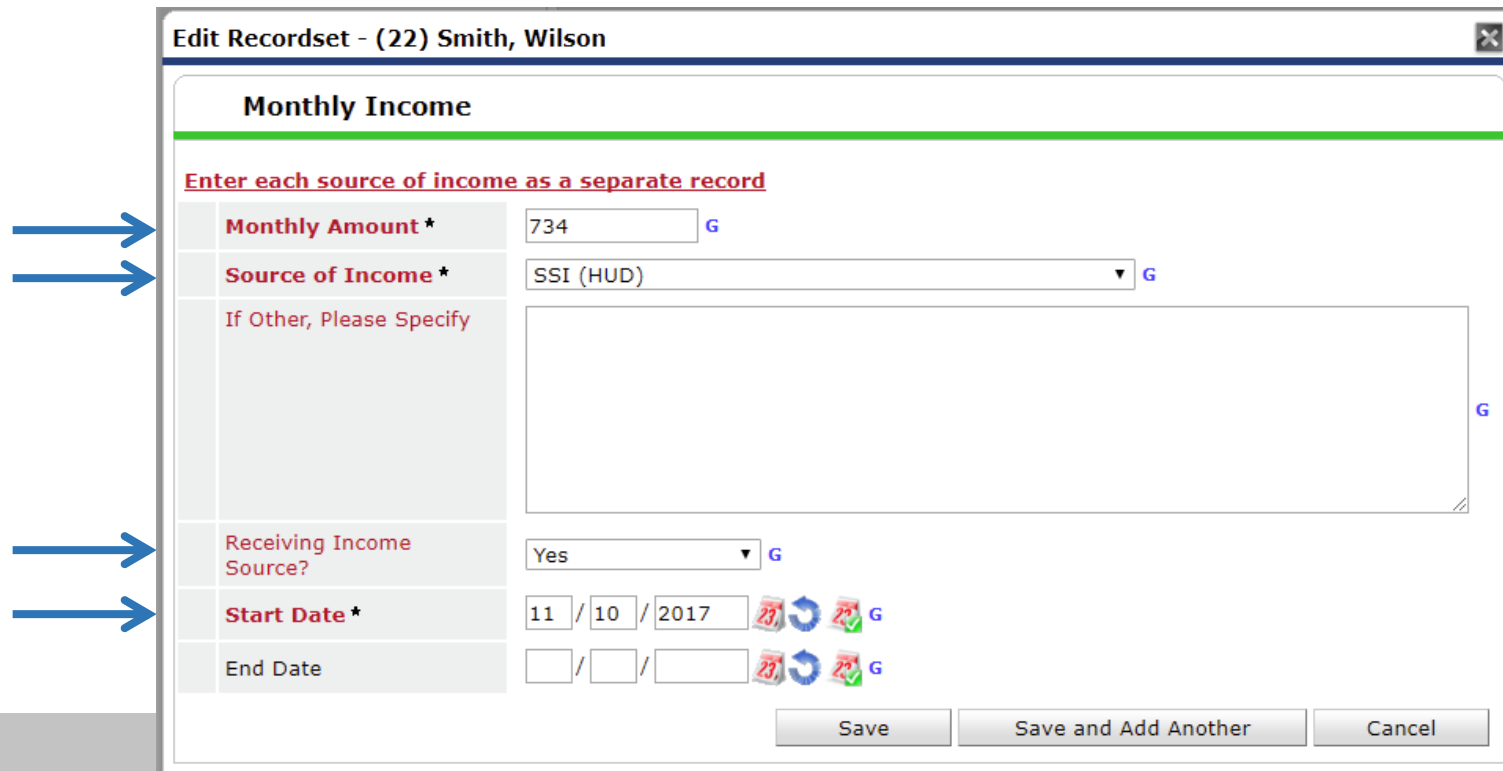
# How to Change Sub-assessments

4. Click Add for a new SSI response



Buttons: Add, View Gross Income, Showing 1-5 of 15, First, Previous, Next, Last

5. Complete Income Source information



**Edit Recordset - (22) Smith, Wilson**

### Monthly Income

**Enter each source of income as a separate record**

<b>Monthly Amount *</b>	734	G
<b>Source of Income *</b>	SSI (HUD)	G
If Other, Please Specify		G
<b>Receiving Income Source?</b>	Yes	G
<b>Start Date *</b>	11 / 10 / 2017	23 23 G
<b>End Date</b>	/ /	23 23 G

Buttons: Save, Save and Add Another, Cancel





# 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 31<sup>st</sup>, but his SSI income has increased to \$786 at your meeting on Nov 10<sup>th</sup>.

## 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	

→

Add	View Gross Income	Showing 11-15 of 15	First	Previous	Next	Last
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# How to Change Sub-assessments

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

5.

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 window 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.









# 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

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

# Longitudinal System Analysis

# LSA Updates

Government Shutdown may (or may not) impact timeline for corrections

Waiting for report updates and feedback before sharing data

Slow progress...



 Keeping an eye on data



# Who is reviewing HMIS data?

## **Who**

HMIS Users

Supervisors

Leadership (Executive Directors or Boards)



# What HMIS data is being reviewed?

## **What**

Fiscal year and calendar year data

Inflow (Demographics, prior living situation)

Outflow (PH exits, length of time homeless)

Data Quality context

 What's Next?

# What's Next Calendar

Due	Report Name
January 30 <sup>th</sup>	Orange Point in Time (PIT) Count
January 31 <sup>st</sup>	State ESG QPR deadline (Jan-Dec) Longitudinal System Analysis (LSA) Final deadline
February 18 <sup>th</sup>	February Orange HMIS Users Meeting*
March 18 <sup>th</sup>	March Orange HMIS Users Meeting
April	PIT Count and Housing Inventory Count (HIC) deadline
May	System Performance Measures (SPM) deadline



[ncceh.org/hmis](https://ncceh.org/hmis)

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

**919.410.6997** or [hmis@ncceh.org](mailto:hmis@ncceh.org)

helpdesk for local support



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