

Before we begin – login so you can follow along

You can try out some of the tips we will show you today in the HMIS@NCCEH training site for ServicePoint*
sp5.servicect.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.



HMIS@NCCEH

HMIS Users Meeting

June 2020



NC COALITION to
HOMELESSNESS end

Agenda

June 2020

System Updates

COVID-19 Response - Reporting

How can we help?

Case Manager tab & Dashlet report

Case Plans tab & ART report

2nd Quarter Recommended Report

What's Next?



We are recording
today's meeting



NCCEH

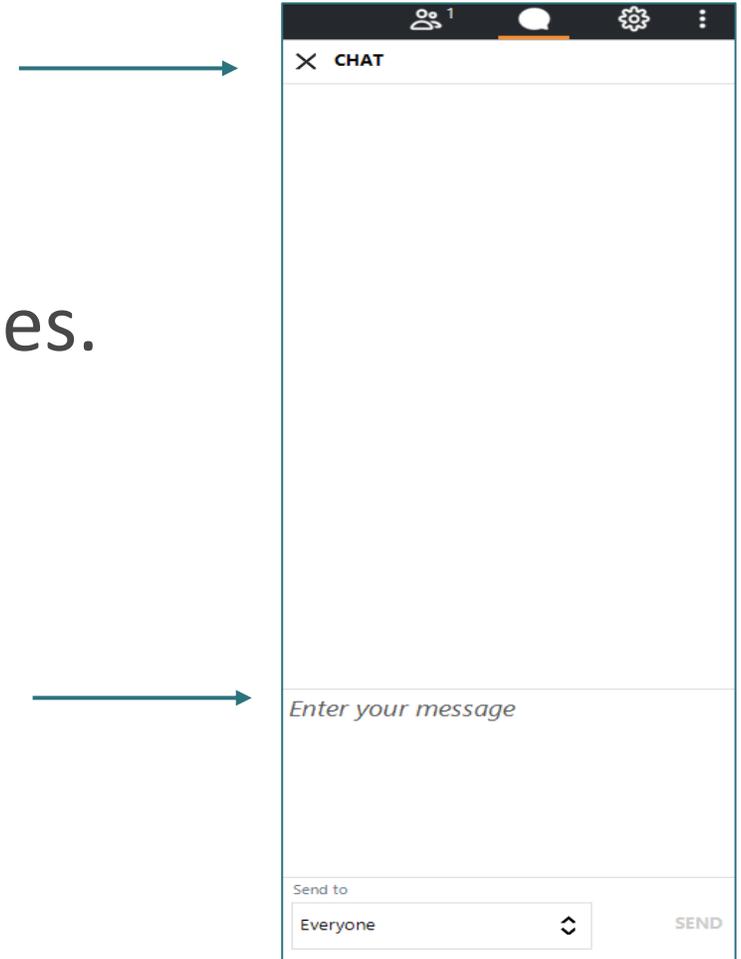
Welcome

Reminders

Your line is muted.

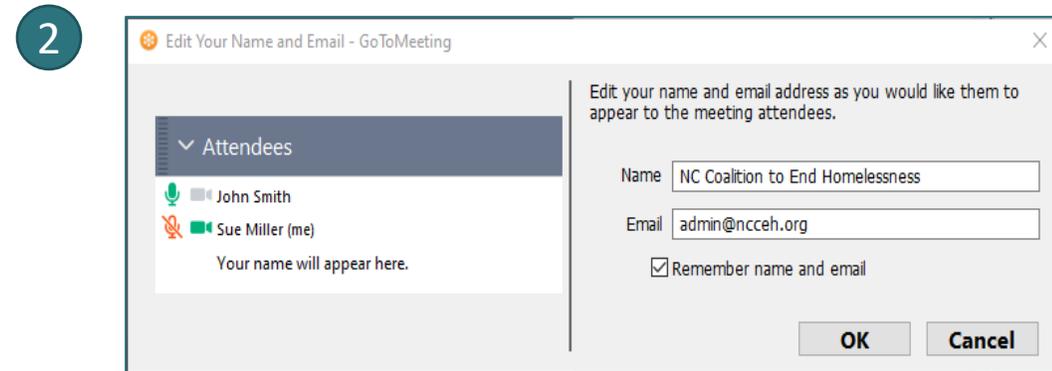
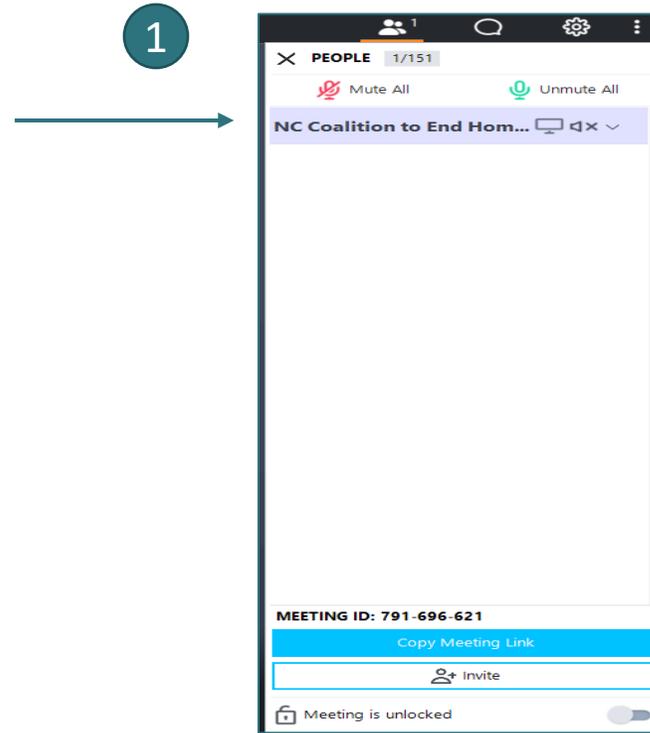
We will unmute the line during Q&A pauses.

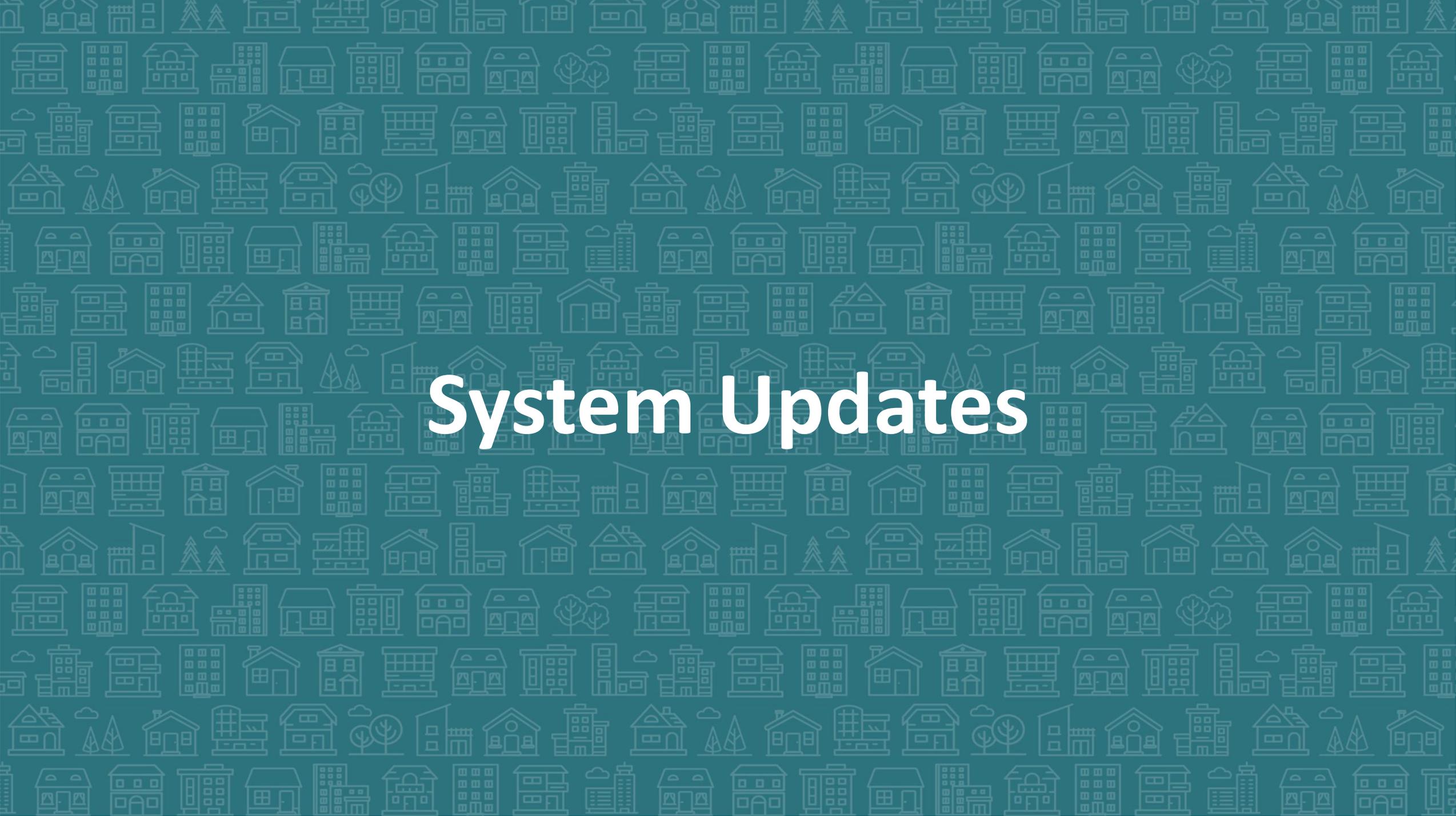
The chat box is available to use anytime.



Who is here?

- Enter your full names, so we know who attended and who asks questions
- If multiple folks are watching at once, use a combo name like, “Andrea Carey and Andy Phillips – the Ands”





System Updates

IRS info on Economic Impact Payments

Clients sending EIPs to your Address or have Questions? Holly Longley from the IRS is ready to answer your questions. Email: Holly.A.Longley@irs.gov Phone: 919-850-1123

Key Information:

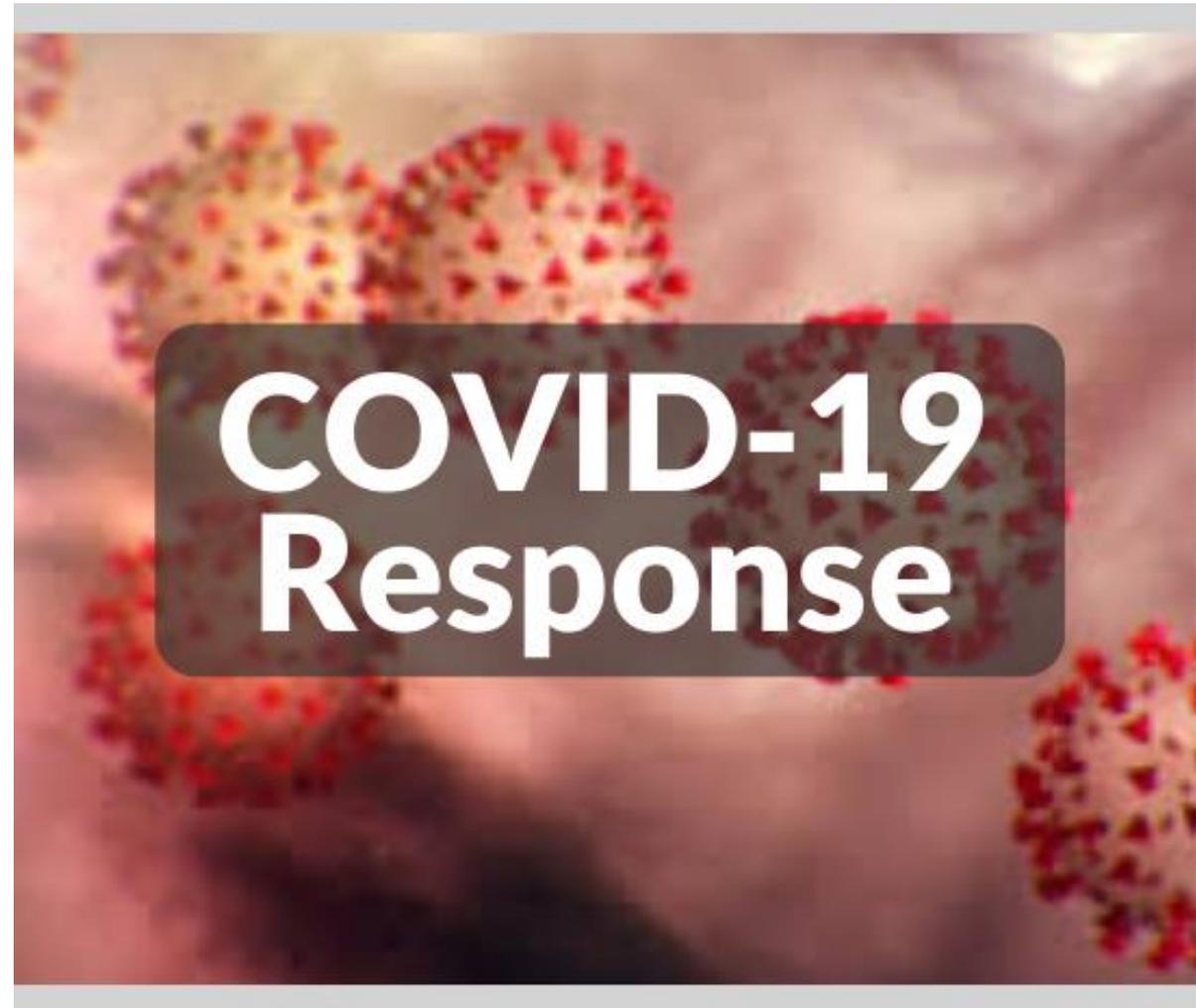
- www.irs.gov/nonfilereip
- More information is being added to IRS.gov/coronavirus.
- You can find additional marketing materials and answers to frequently asked questions at IRS.gov/eippartners.
- Please follow the [IRS Social Media accounts](#) to receive the latest information that the IRS shares.

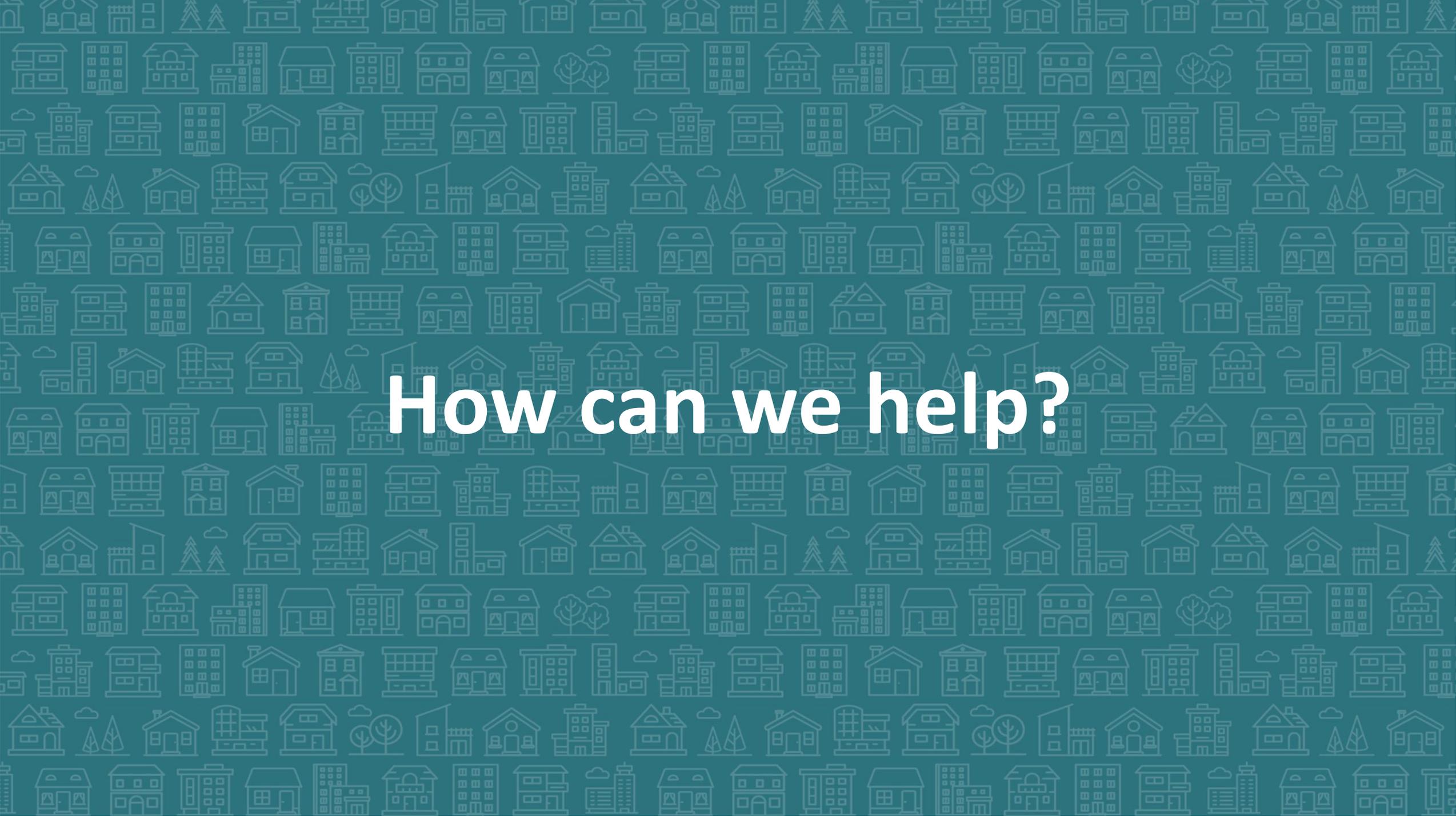


COVID-19 Response in HMIS

- 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

↑ Find all this and more at
nccch.org/hmis/training ↑





How can we help?



Case Manager Tab

Track who is a client's Case Manager

Record client's point person

Save best contact information

See changes over time

Access other ServicePoint features:

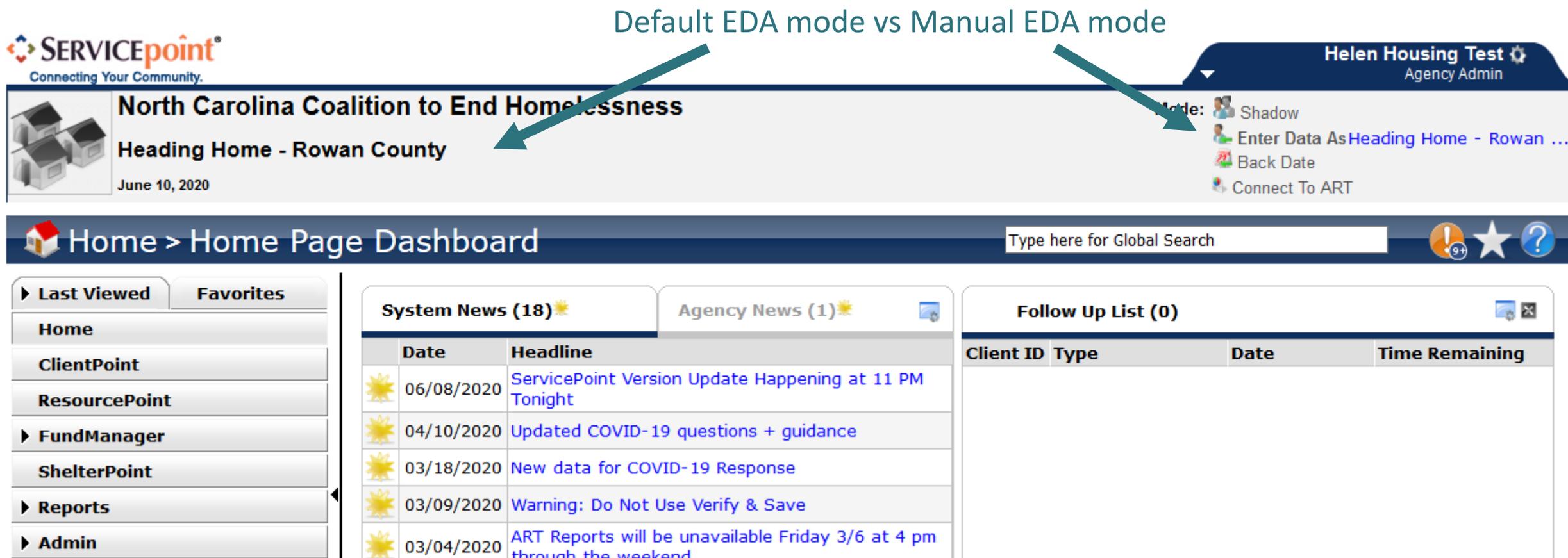
- My Client Counts Reports
- Follow-up Lists
- Case Plans/Goals



Track who is a client's Case Manager

- Enter Data As (EDA) mode matters!

Default EDA mode vs Manual EDA mode

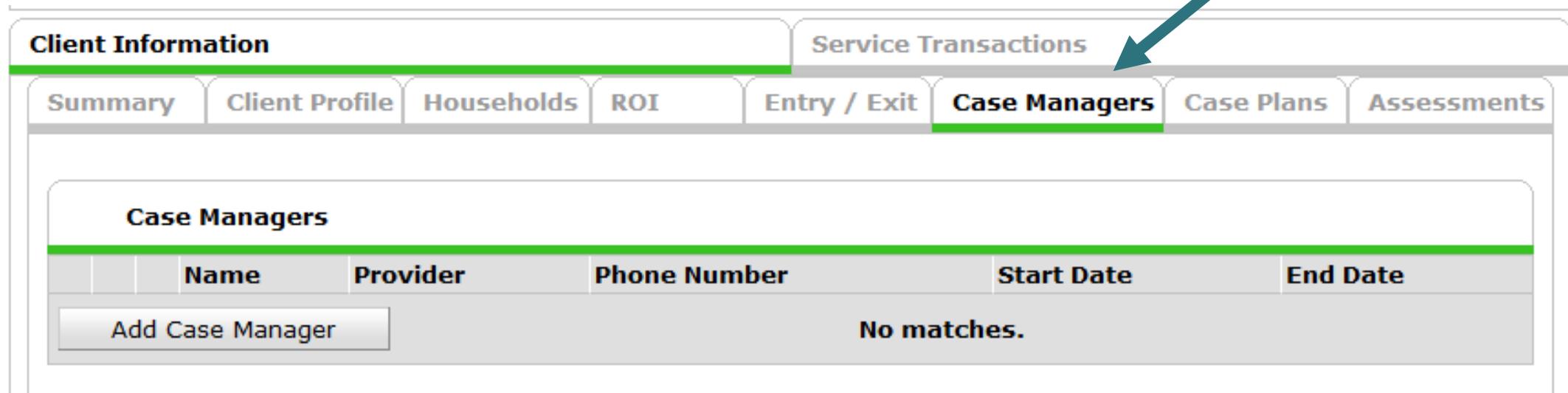


The screenshot displays the ServicePoint web application interface. At the top left is the ServicePoint logo with the tagline 'Connecting Your Community'. The main header area shows the case title 'North Carolina Coalition to End Homelessness' and 'Heading Home - Rowan County' with a date of 'June 10, 2020'. On the right side of the header, there is a user profile for 'Helen Housing Test' (Agency Admin) and a dropdown menu for 'Enter Data As' with options: 'Shadow', 'Enter Data As Heading Home - Rowan ...', 'Back Date', and 'Connect To ART'. Below the header is a navigation bar with 'Home > Home Page Dashboard' and a search box. The main content area is divided into three sections: 'Last Viewed' and 'Favorites' on the left, 'System News (18)' in the middle, and 'Follow Up List (0)' on the right. The 'System News' section contains a table of news items.

Date	Headline
06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight
04/10/2020	Updated COVID-19 questions + guidance
03/18/2020	New data for COVID-19 Response
03/09/2020	Warning: Do Not Use Verify & Save
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend

Add a Case Manager

- Go through ClientPoint
- Case Managers is under the Client Information Tab
- Tabs can be adjusted for each project by the Data Center
- Click Add Case Manager



The screenshot displays the ClientPoint interface. At the top, there are two main tabs: 'Client Information' (highlighted with a green bar) and 'Service Transactions'. Under 'Client Information', there are several sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers' (highlighted with a green bar), 'Case Plans', and 'Assessments'. A teal arrow points to the 'Case Managers' sub-tab. Below the tabs, there is a section titled 'Case Managers' containing a table with the following columns: Name, Provider, Phone Number, Start Date, and End Date. Below the table, there is a button labeled 'Add Case Manager' and a message that says 'No matches.'

Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type * ServicePoint User Me Other

Select User *

Name *

Title

Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type * ServicePoint User Me Other

Select User *

Name *

Title



Find the User with their default EDA mode

Add a Case Manager: Other

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type * ServicePoint User Me Other

Name *

Title

Phone Number

Email Address



Contact Info opens up to be manually added

Add a Case Manager

Usually, you are selecting yourself!

Name & Contact Info automatically appears

Case Manager

Case Manager - (4) Solo, Han

▼ Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type * ServicePoint User Me Other

Name * Helen Housing Test

Title

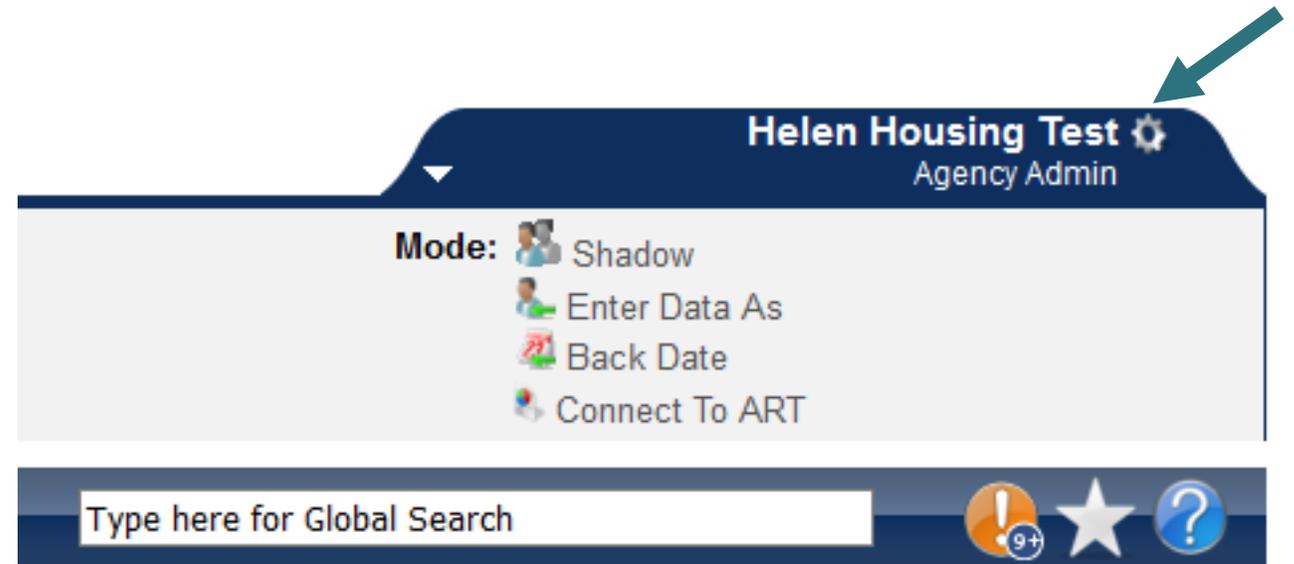
Phone Number

Email Address hmis@ncceh.org

How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on nccch.org/hmis/training

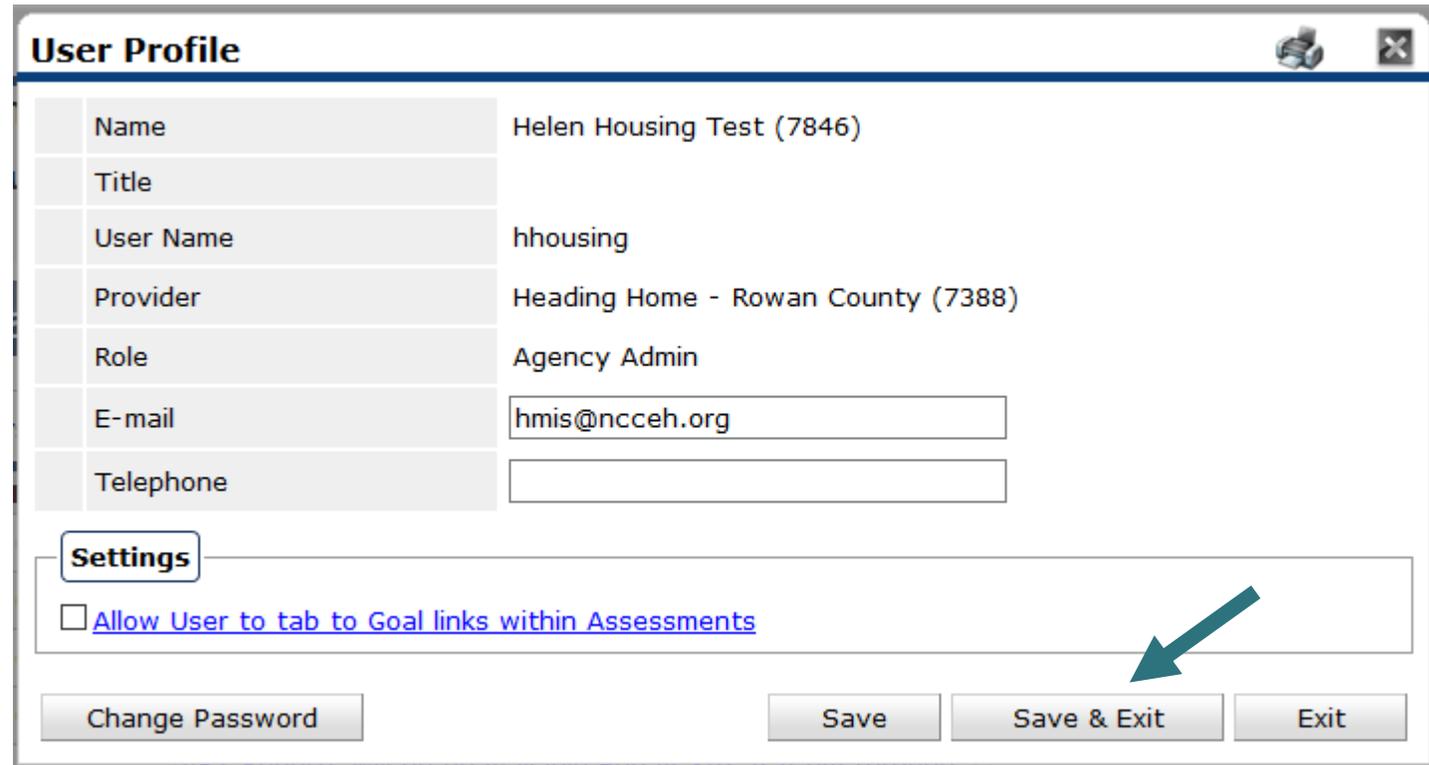
- Find the User Profile Setting icon



How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Update E-mail and Phone info
- Save & Exit



User Profile	
Name	Helen Housing Test (7846)
Title	
User Name	hhousing
Provider	Heading Home - Rowan County (7388)
Role	Agency Admin
E-mail	<input type="text" value="hmis@ncceh.org"/>
Telephone	<input type="text"/>

Settings

[Allow User to tab to Goal links within Assessments](#)

Add a Case Manager

Decision Points:

- Which project does the case manager work on behalf of?
- When did they start working together?

 **To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.**

(125413) Single Parent

(4) Solo, Han

(501224) Solo, Ben

Type *	<input type="radio"/> ServicePoint User <input checked="" type="radio"/> Me <input type="radio"/> Other
Name *	<input type="text" value="Helen Housing Test"/>
Title	<input type="text"/>
Phone Number	<input type="text"/>
Email Address	<input type="text" value="hmis@ncceh.org"/>
Provider *	<input type="text" value="Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)"/>
Start Date *	<input type="text" value="06"/> / <input type="text" value="10"/> / <input type="text" value="2020"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

Already there because of EDA mode!



Case Manager Saved!

- Now anyone in my agency or visibility group can see our work together!

Release of Information: **Ends 04/10/2021** -Switch to Another Household Member-

Client Information Service Transactions

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

Case Managers

			Name	Provider	Phone Number	Start Date	End Date
			Helen Housing Test	Heading Home - Rowan County - Rapid Re-Housing - ESG		06/10/2020	

Showing 1-1 of 1

Let's see this in action

HMIS@NCCEH training site for ServicePoint*

sp5.servicapt.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.



NCCEH



Counts Reports

Home Page Counts Dashlet Reports

Pros:

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Rolling dates available

Cons:

- Limited, cannot change options
- Only 4 spots
- EDA mode sensitive



Set-Up Counts Reports

- Open the black arrow for Customize Home Page Dashboard

The screenshot shows a web dashboard with a dark blue header. The header contains a home icon, the text "Home > Home Page Dashboard", a search bar with the placeholder "Type here for Global Search", and three icons: an exclamation mark, a star, and a question mark.

On the left side, there is a vertical navigation menu with two tabs: "Last Viewed" and "Favorites". The menu items are: Home, ClientPoint, ResourcePoint, FundManager, ShelterPoint, Reports, Admin, and Logout. A black arrow points to the "Reports" item.

The main content area is divided into three sections:

- System News (18)**: A table with columns "Date" and "Headline".

Date	Headline
06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight
04/10/2020	Updated COVID-19 questions + guidance
03/18/2020	New data for COVID-19 Response
03/09/2020	Warning: Do Not Use Verify & Save
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend
02/17/2020	ART failed this morning (Updated 2.17)

View All
- Agency News (1)**: A section with a gear icon and a close icon.
- Follow Up List (0)**: A table with columns "Client ID", "Type", "Date", and "Time Remaining".

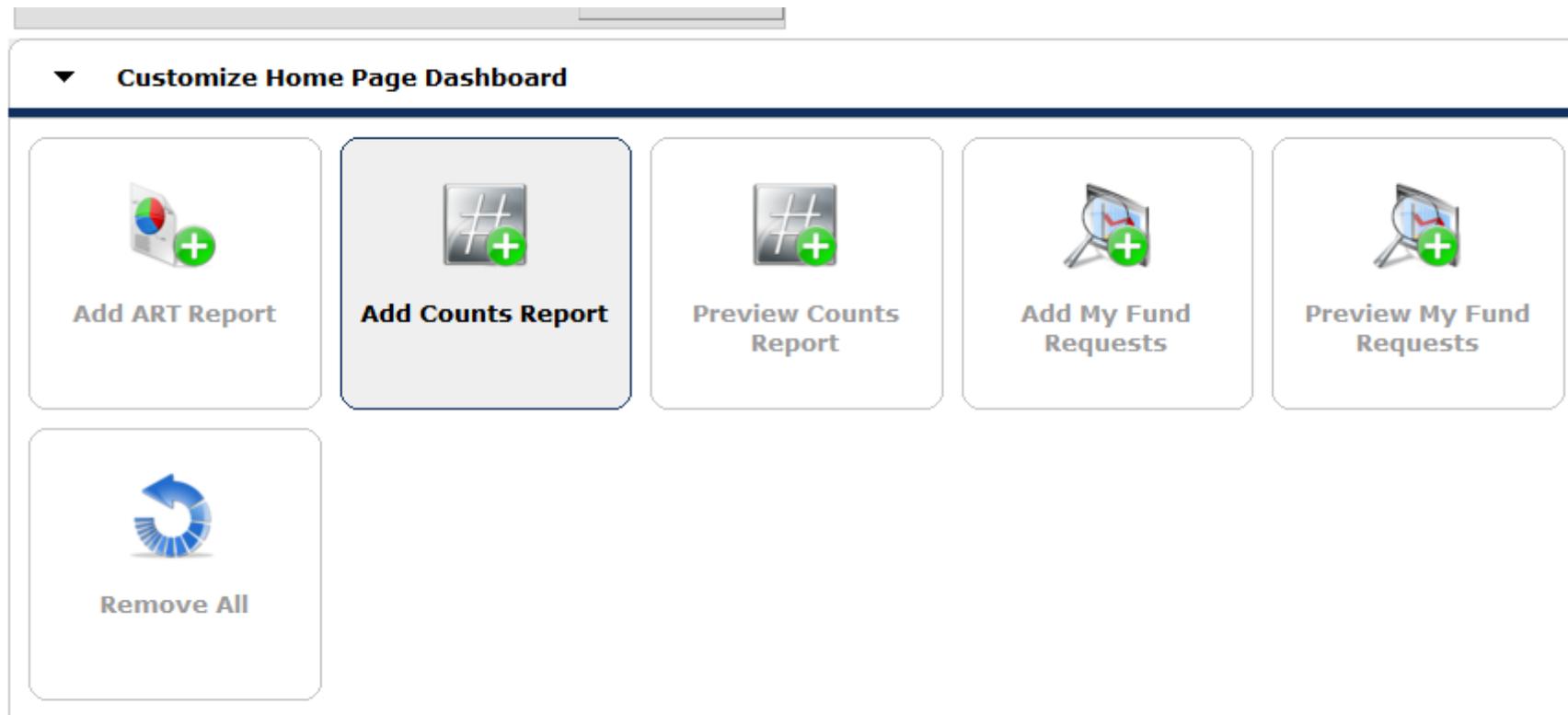
Client ID	Type	Date	Time Remaining
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View All

At the bottom of the dashboard, there is a button labeled "Customize Home Page Dashboard" with a black arrow pointing to it.

Set-Up Counts Reports

- Look for Add Counts Report
- Options may vary



The screenshot displays a 'Customize Home Page Dashboard' interface. At the top, there is a dropdown menu labeled 'Customize Home Page Dashboard'. Below this, there are five main dashboard widgets in a row, each with an icon and a green plus sign:

- Add ART Report**: Icon of a pie chart.
- Add Counts Report**: Icon of a grid with a hash symbol (#).
- Preview Counts Report**: Icon of a grid with a hash symbol (#).
- Add My Fund Requests**: Icon of a presentation board with a chart.
- Preview My Fund Requests**: Icon of a presentation board with a chart.

Below the row of five widgets is a single widget labeled **Remove All** with a blue circular arrow icon.

Set-Up Counts Reports

System News (18)		Agency News (1)
Date	Headline	
06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight	
04/10/2020	Updated COVID-19 questions + guidance	
03/18/2020	New data for COVID-19 Response	
03/09/2020	Warning: Do Not Use Verify & Save	
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend	
02/17/2020	ART failed this morning (Updated 2.17)	

View All

Follow Up List (0)			
Client ID	Type	Date	Time Remaining

View All

Click the Pencil!

Counts Report

Top-Left	Top-Right
Bottom-Left	Bottom-Right

Refresh



Set-Up Counts Reports

Edit Dashlet [Close]

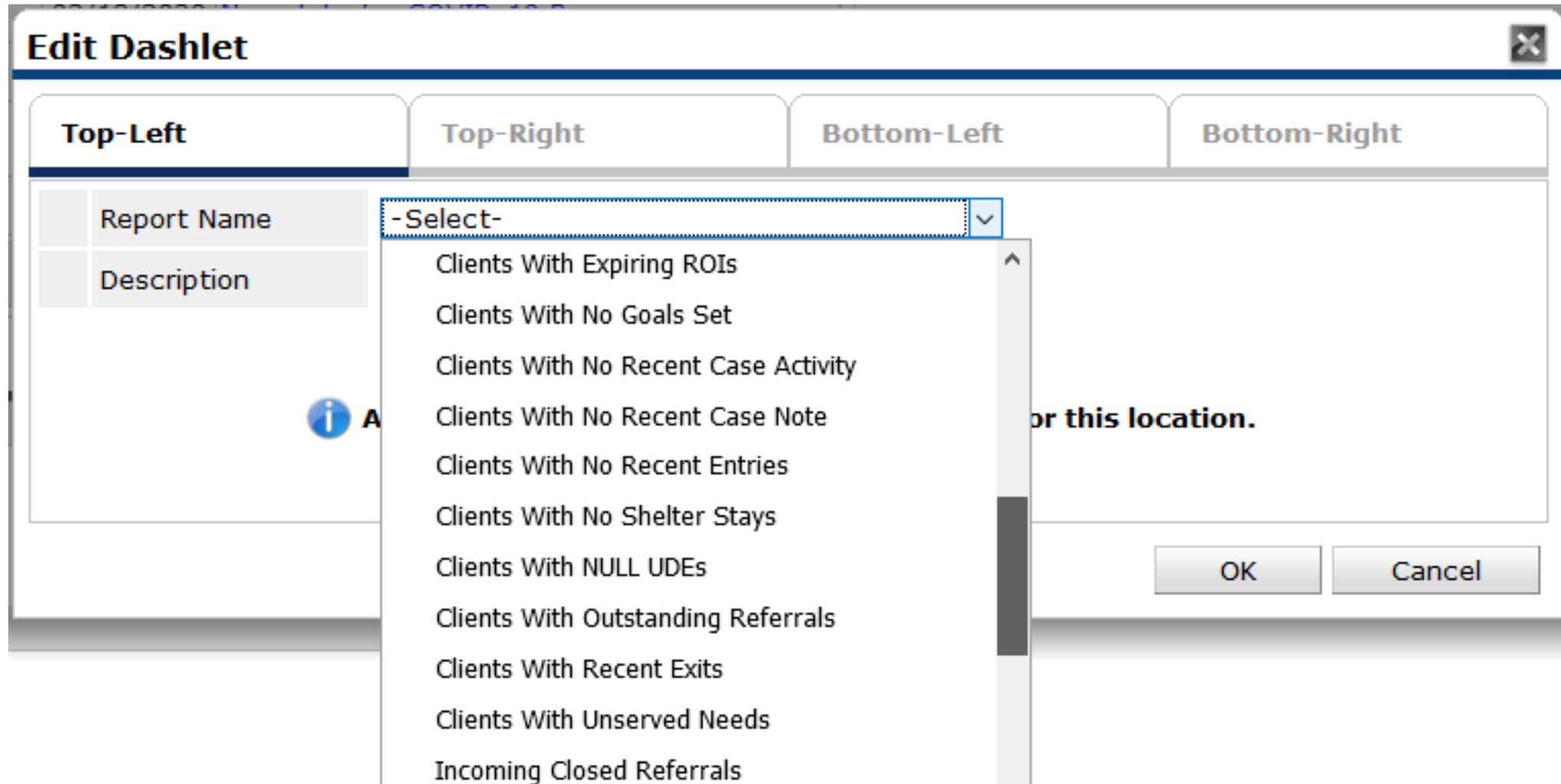
Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	-Select-		
Description	N/A		

i A Counts Report is not currently designated for this location.

OK Cancel

Set-Up Counts Reports

- Standard list to choose from

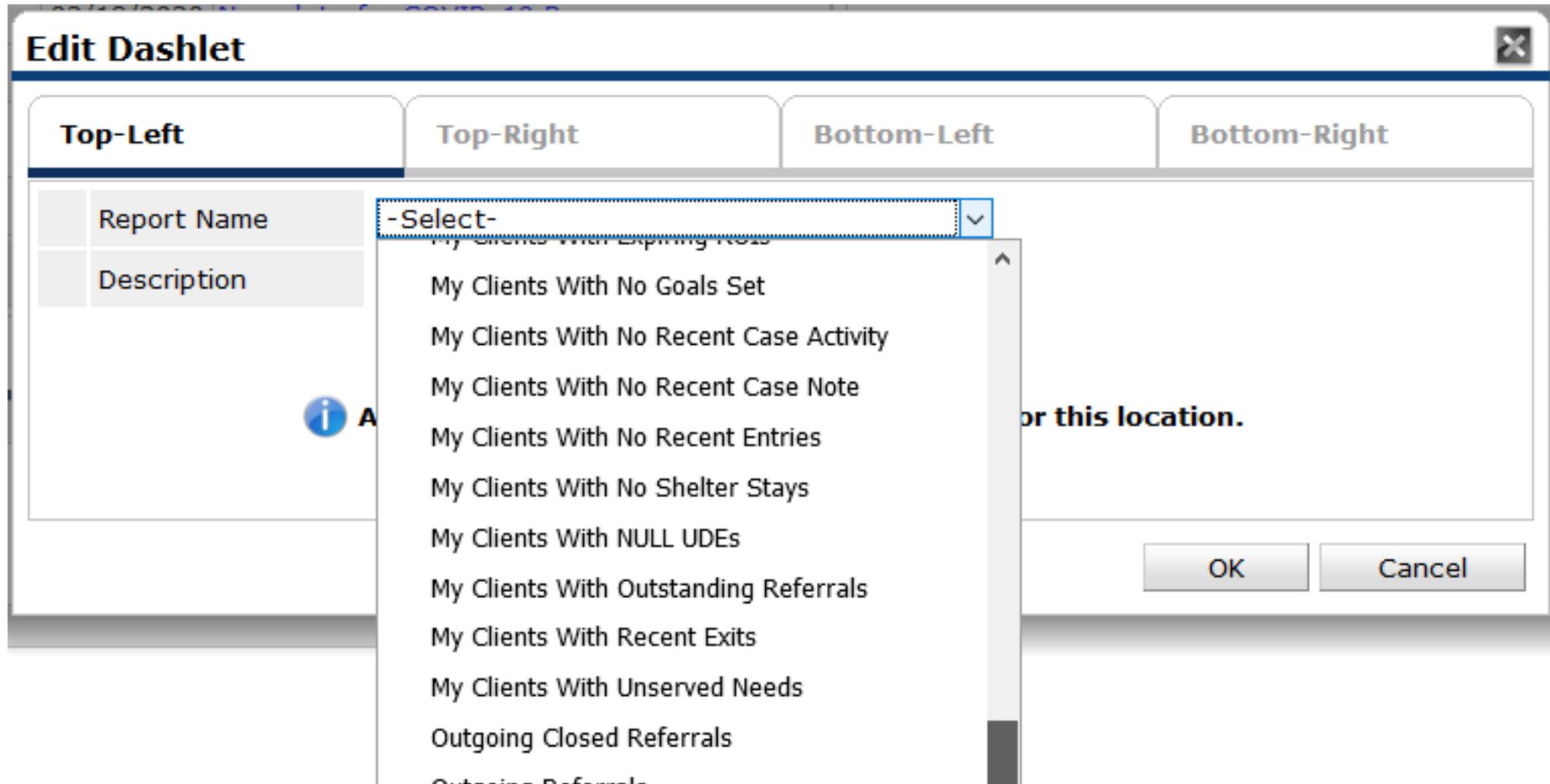


The screenshot shows a software window titled "Edit Dashlet" with a close button in the top right corner. The window is divided into four quadrants: "Top-Left", "Top-Right", "Bottom-Left", and "Bottom-Right". In the "Top-Left" quadrant, there is a table with two rows: "Report Name" and "Description". A dropdown menu is open over the "Report Name" field, displaying a list of report options. The "Bottom-Right" quadrant contains the text "for this location." and two buttons: "OK" and "Cancel".

Report Name	Description
-Select-	
Clients With Expiring ROIs	
Clients With No Goals Set	
Clients With No Recent Case Activity	
Clients With No Recent Case Note	
Clients With No Recent Entries	
Clients With No Shelter Stays	
Clients With NULL UDEs	
Clients With Outstanding Referrals	
Clients With Recent Exits	
Clients With Unserved Needs	
Incoming Closed Referrals	

Set-Up Counts Reports

- Many use Case Manager tab to find “My Clients”



The screenshot shows the 'Edit Dashlet' dialog box with four tabs: 'Top-Left', 'Top-Right', 'Bottom-Left', and 'Bottom-Right'. The 'Top-Left' tab is active. It contains a table with two columns: 'Report Name' and 'Description'. A dropdown menu is open over the 'Report Name' column, displaying a list of report options. The options include 'My Clients With No Goals Set', 'My Clients With No Recent Case Activity', 'My Clients With No Recent Case Note', 'My Clients With No Recent Entries', 'My Clients With No Shelter Stays', 'My Clients With NULL UDEs', 'My Clients With Outstanding Referrals', 'My Clients With Recent Exits', 'My Clients With Unserved Needs', 'Outgoing Closed Referrals', and 'Outgoing Referrals'. The 'OK' and 'Cancel' buttons are visible at the bottom right of the dialog box.

Report Name	Description
-Select-	
My Clients With No Goals Set	
My Clients With No Recent Case Activity	
My Clients With No Recent Case Note	
My Clients With No Recent Entries	
My Clients With No Shelter Stays	
My Clients With NULL UDEs	
My Clients With Outstanding Referrals	
My Clients With Recent Exits	
My Clients With Unserved Needs	
Outgoing Closed Referrals	
Outgoing Referrals	

Set-Up Counts Reports

- Two main filters available: (Rolling) Dates and Projects

Edit Dashlet

Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	My Clients With An Entry But No Exit		
Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager		
Filters			
Select Dates		Start Date	End Date
Today		06 / 10 / 2020	06 / 10 / 2020
Provider Type *	<input checked="" type="radio"/> System Wide <input type="radio"/> Provider <input type="radio"/> Reporting Group		

OK Cancel

Set-Up Counts Reports

Today
Yesterday
This Week
This Month
This Quarter
This Year
Last Week
Last Month
Last Quarter
Last Year
All Dates

Today

Top-Right Bottom-Left Bottom-Right

My Clients With An Entry But No Exit

Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager

Start Date End Date

06 / 10 / 2020 06 / 10 / 2020

Provider Type * System Wide Provider Reporting Group

OK Cancel



Set-Up Counts Reports

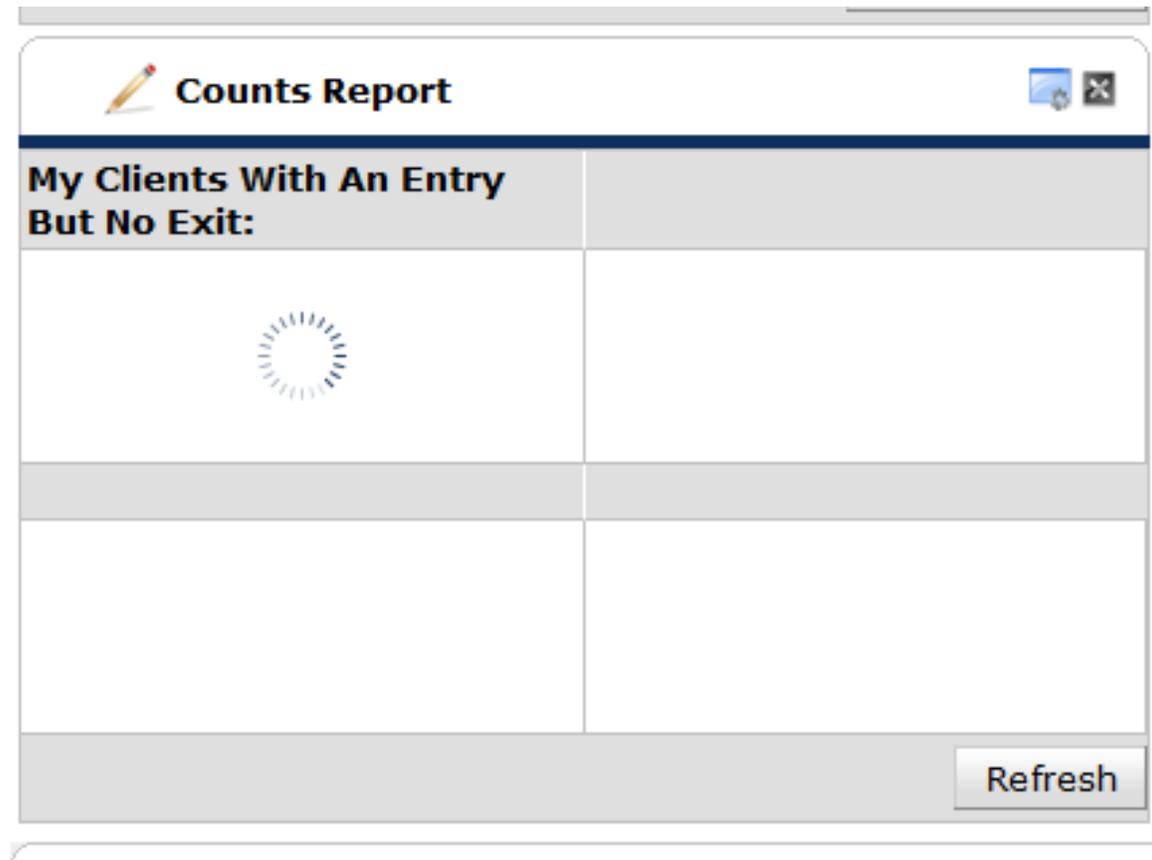
- Provider lets you select the entire agency (incl. subordinates) or not

Edit Dashlet

Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	My Clients With An Entry But No Exit		
Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager		
Filters			
Select Dates		Start Date	End Date
Today		06 / 10 / 2020	06 / 10 / 2020
Provider Type *	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group		
Provider *	Heading Home - Rowan County (7388)		
Including Subordinates	<input type="checkbox"/>		

Set-Up Counts Reports

- Once a box is modified, the report will immediately pull.



Home Page Counts Dashlet Reports

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Good options to consider:
 - See when new Referrals are recorded
 - See when a follow-up is scheduled for this day/week/month
 - See info about *your* clients
- Watch for how data changes in and out of EDA mode

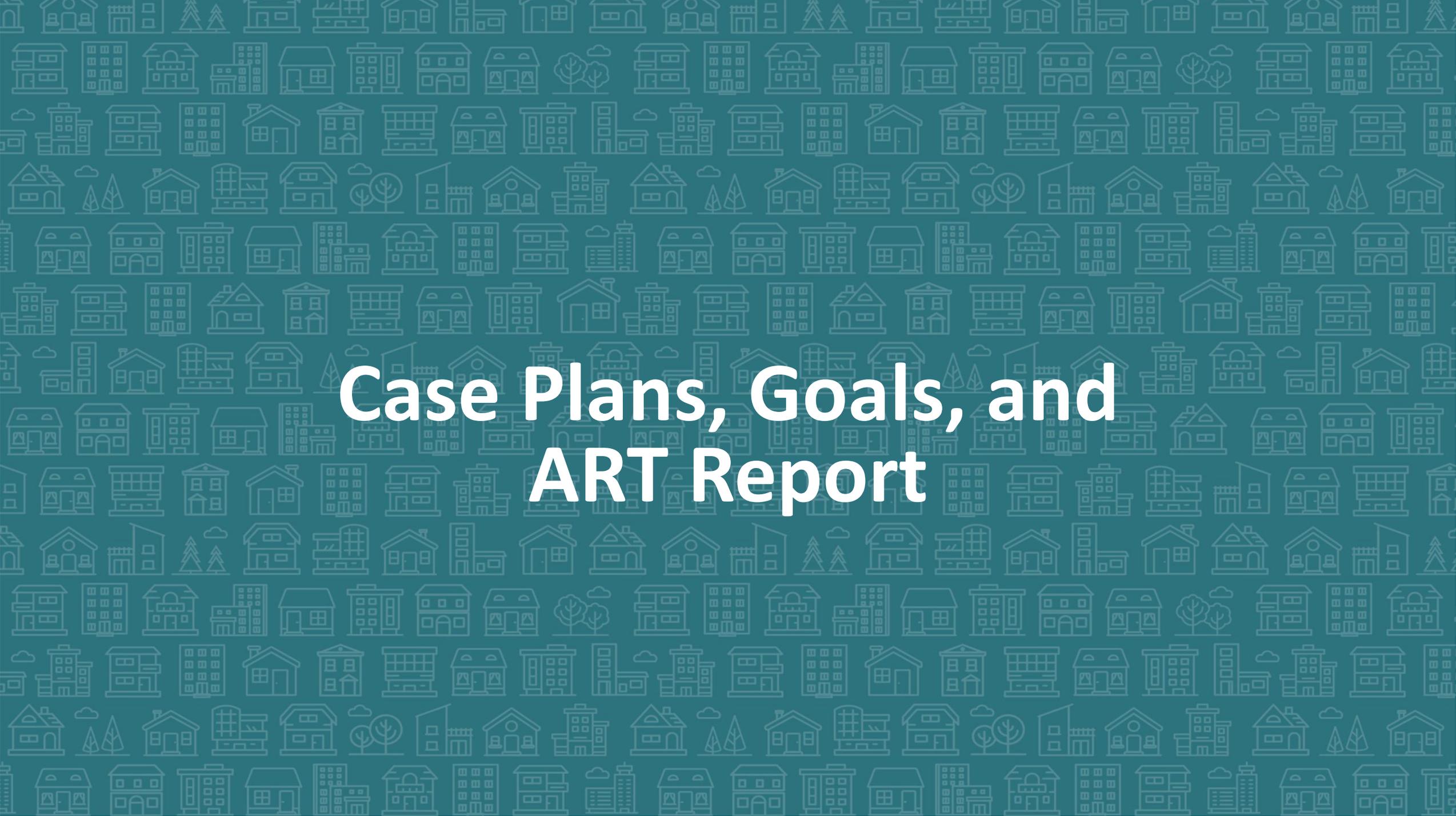


Home Page Counts Dashlet Reports

Questions?

What would you like to try?





Case Plans, Goals, and ART Report

Case Plans, Goals, and ART Report

- Track client progress
- Add Case Notes on the Progress
- Link Service Transactions
- 0404 ART Report – Client Case Plans Overview



How to add Case Goals

- Navigate to the client's profile then to Case Plans

 (52) Funday, Sunday
Release of Information: **None**

Client Information | Service Transactions

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

Goals

	Classification	Type	Date Added	Date Set ▼	Notes	Latest Note Date	
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How to add Case Goals

- From there, click Add Goal

Goals						
Classification	Type	Date Added	Date Set ▼	Notes	Latest Note Date	
Add Goal		No matches.				

- Add the Case Manager

Goal

Goal - (52) Funday, Sunday

▼ Household Members

This Client is not a member of any Households.

Provider *	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▼
Case Manager	-Select- ▼
Date Goal was Set *	-Select- Helen Housing Test



Filling in the Case Goal

- Fill in the sections about the Goal itself
 - Classification and Type work together as a broad and then detailed goal
 - Target Date is the date the goal is to be completed

Date Goal was Set *	06 / 09 / 2020   
Classification *	Education 
Type *	Complete vocational training 
Goal Description	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <div style="text-align: right;"> </div>
Target Date	09 / 09 / 2020   
Overall Status *	In Progress 

Classification has a variety of options which then determine Types available



Filling in the Case Goal

- Fill in the sections about the goal's timeline
 - While working on the goal, the status should be 'In Progress'
 - Updates can be made close to the Target Date
 - Works with Outcome

Target Date	09 / 09 / 2020   
Overall Status *	<div style="border: 1px solid gray; padding: 2px;"><p>In Progress ▾</p><p>-Select-</p><p>Canceled</p><p>Closed</p><p>Identified</p><p>In Progress</p><p>-Select- ▾</p></div>
If Closed, Outcome	ved ▾ 09 / 09 / 2020   
If Partially Complete, Percent Complete	

Filling in the Case Goal

- Fill in the sections about the goal's timeline
 - Chose what the outcome is when Overall Status is Closed

Target Date	09 / 09 / 2020   
Overall Status *	In Progress ▾
If Closed, Outcome	Partially achieved ▾ 09 / 09 / 2020   
If Partially Complete, Percent Complete	<div style="border: 1px solid gray; padding: 2px;"><p>Partially achieved ▾</p><p>-Select-</p><p>Abandoned</p><p>Achieved</p><p>Partially achieved</p><p>Revised</p></div>

Filling in the Case Goal

- Fill in the sections about the goal's timeline
 - If outcome was 'Partially achieved', add a 'Percent Complete'

Target Date	09 / 09 / 2020   
Overall Status*	Closed 
If Closed, Outcome	Partially achieved 
If Partially Complete, Percent Complete	50% 

07 / 20 / 2020   

Filling in the Case Goal

- Fill in the sections about the goal's timeline
 - Follow Up Date, agreed on with the client
 - Update status
 - Click Add Goal

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390)  <input type="text" value="-Select-"/> 
Follow Up Made	<input type="text" value="-Select-"/> 
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Outcome at Follow Up	<input type="text" value="-Select-"/> 

Add Goal

Cancel



NCCEH

How to add additional Notes and Goals

After Add Goal is clicked three options are presented:

- Case Notes
- Action Steps
- Service Transaction

Case Notes				
Provider	Case Manager	User Creating	Note Date	Note
Add Case Note		No matches.		

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.

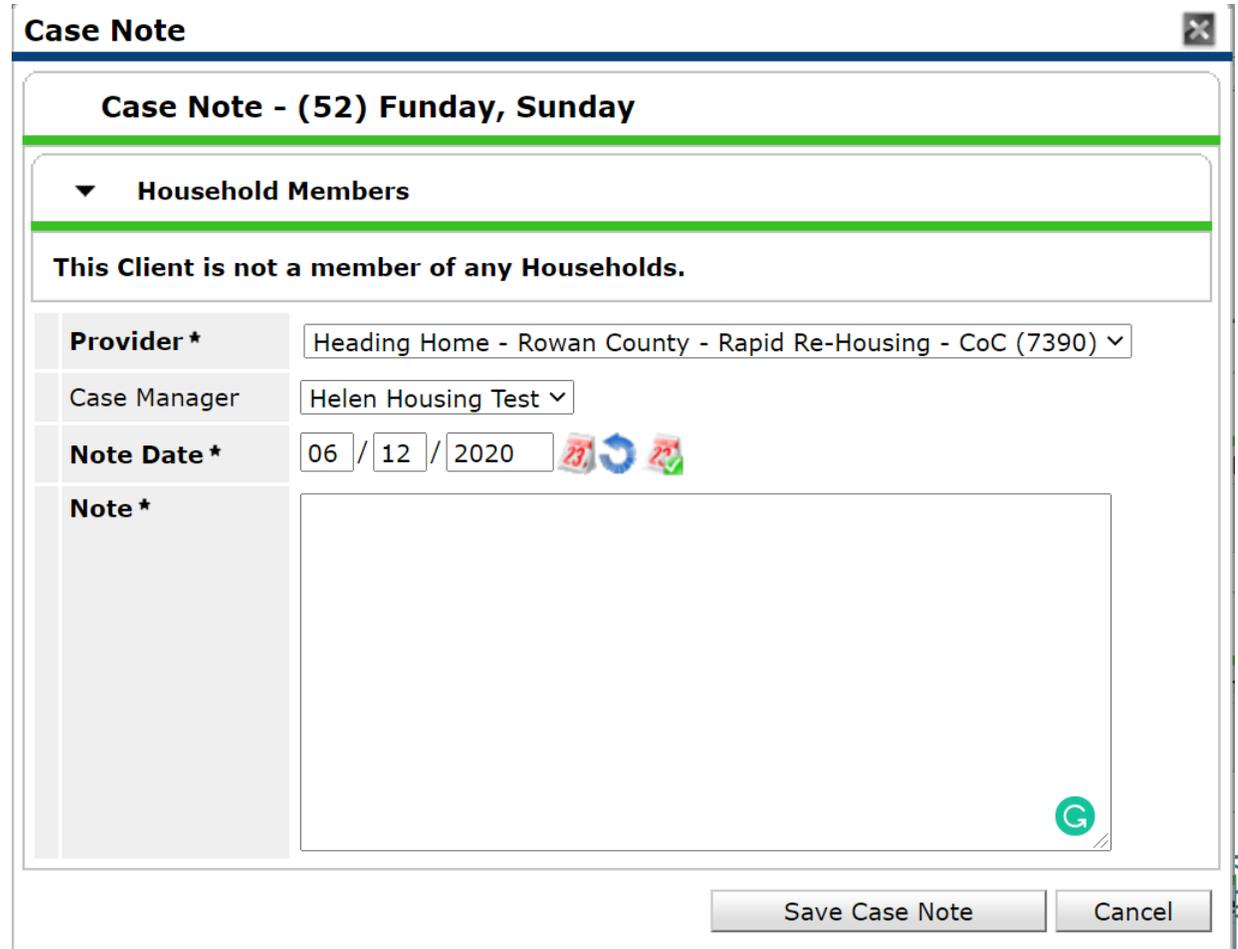
Print	Save Goal	Save & Exit	Exit
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How to add Case Notes

Click Add a Case Note

- Note Date Auto-populates
- Add your Note
- Save Case Notes



The screenshot shows a software window titled "Case Note" with a close button in the top right corner. The window content is as follows:

- Case Note - (52) Funday, Sunday** (Section header)
- Household Members** (Section header with a dropdown arrow)
- This Client is not a member of any Households.** (Text message)
- Provider *** (Dropdown menu): Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▾
- Case Manager** (Dropdown menu): Helen Housing Test ▾
- Note Date *** (Date input): 06 / 12 / 2020. To the right of the date are three icons: a calendar, a refresh/circular arrow, and a checkmark.
- Note *** (Text area): A large empty text area for entering the note content. A green circular icon with a white 'G' is located in the bottom right corner of this text area.

At the bottom of the window, there are two buttons: "Save Case Note" and "Cancel".



How to add Case Notes

After Case Note is saved:

- Shows Date, Note, and Case Manager's Name

Case Notes						
		Provider	Case Manager	User Creating	Note Date	Note
		Heading Home - Rowan County - Rapid Re-Housing - CoC	Helen Housing Test	Andy Phillips	06/12/2020	This is a test note!

Showing 1-1 of 1

Add an Action Step

- Similar to the original Goal
- Used as a detail to the Goal
- Fill out in the same way

Provider *	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▾				
Date Action Step was set	06 / 12 / 2020				
Action Step *	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <div style="text-align: right;"><input type="checkbox"/>  </div>				
Target Date	/ /				
Overall Status *	-Select- ▾				
If Closed, Outcome	-Select- ▾	/ /			
Projected Follow Up Date	/ /				
Follow Up User	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▾ -Select- ▾				
Follow Up Made	-Select- ▾				
Completed Follow Up Date	/ /				
Outcome at Follow Up	-Select- ▾				

Save Action Step

Cancel

Add Service Transaction

- Add Service
- Click 'OK'

Follow Up M sp5.servicept.com says

Completed This will close the Goal popup and take you to the Service Transactions page.

Outcome a

OK Cancel

Case Notes

Provider	Case Manager	User Creating	Note Date	Note
Heading Home - Rowan County - Rapid Re-Housing - CoC	Helen Housing Test	Andy Phillips	06/12/2020	This is a test note!

Add Case Note

Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Add Action Step

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service Add Multiple Services

Print Save Goal Save & Exit Exit



Add Service Transaction

- Brought over to Service Transaction tab
- Create the Service

Client Information		Service Transactions	
Add Service			
▼ Household Members			
This Client is not a member of any Households.			
Service Provider *	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▼		
Creating User	Andy Phillips		
Start Date *	06 / 12 / 2020	10	: 51 : 35 AM
End Date	/ /		: : :
Service Type *	-Select- ▼ <input type="button" value="Look Up"/>		
Provider Specific Service	-Select- ▼		
		<input type="button" value="Save & Continue"/>	<input type="button" value="Cancel"/>



Add Service Transaction

- Once completed, it will list under Service Transactions
- Navigate back to the Case Plans tab

All Service Transactions												
Select Dates				Start Date			End Date					
-Select- ▼				<input type="text"/> / <input type="text"/> / <input type="text"/>   			<input type="text"/> / <input type="text"/> / <input type="text"/>   			<input type="text" value="Search"/>		
				Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal			
				Need	06/12/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management	Identified / Fully Met	Education / Complete vocational training			
				Service	06/12/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management					

Showing 1-1 of 1

Save and Exit from the Goal

- Once completed, it will list under Service Transactions

Case Notes

	Provider	Case Manager	User Creating	Note Date	Note
 	Heading Home - Rowan County - Rapid Re-Housing - CoC	Helen Housing Test	Andy Phillips	06/12/2020	This is a test note!

Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Service Items for this Goal

	Date Set	Created By	Need Type	Need Status	Outcome of Need
 	06/12/2020	Andy Phillips	Case/Care Management	Identified	Fully Met

Showing 1-1 of 1

Finished Case Goal

- A created goal will have the Classification, Type, Dates, and number of Notes

Goals								
		Classification	Type	Date Added	Date Set ▼	Notes	Latest Note Date	
		Education	Complete vocational training	06/09/2020	06/09/2020		06/12/2020	

Showing 1-1 of 1

ART Report: 0404 – Client Case Plans

Purpose of Report

- View multiple client's Case Plans at Once
- Track their Case Notes
- Overall Goals
- Group Statistics



ART Report: 0404 – Client Case Plans

Tab A – Results:

- Shows Case Manager
- Demographics
- Goal Date Set
- Overall View of History

Solo , Han #4

Date of Birth :	5/4/1978
Current Age :	42
Soc Sec # :	123-45-6789
Currently Enrolled :	Yes

Case Manager History

no case manager history

Enrollment History

Heading Home - Rowan County - Emergency Shelter(7389)	1/26/2019 to 4/10/2020
Heading Home - Rowan County - Emergency Shelter(7389)	1/26/2019 to 3/26/2019
Heading Home - Rowan County - Emergency Shelter(7389)	8/21/2018 to present

Infraction History

no infraction history

Goal Date Set: 10/17/19

Classification	Goal Type	Target Date	Status	Outcome	Outcome Date
Education	Get GED		Identified		

Action Steps: no

Casenotes: none

ART Report: 0404 – Client Case Plans

- Tab B – Casenotes Only:
 - Case Note Creator
 - Date of Note
 - Note itself

#

Casenote Provider:

Casenote User	Casenote Date	Casenote Note

ART Report: 0404 – Client Case Plans

- Tab C – Goal Totals:
 - Total Goal Records
 - Total Client Count
 - Clients per counts

Goal Provider: **Heading Home - Rowan County - Emergency Shelter(7389)**

Total Goal Record Count	Total Client Count
1	1

Goal Classification	Goal Type	Goal Status	Goal Outcome	Goal Record Count	Client Count
Education	Get GED	Identified	Not Applicable	1	1



ART Report: 0404 – Client Case Plans

- Tab D – Statistics:
 - For whole agency
 - Breaks down five different types

Provider: Heading Home - Rowan County - Emergency Shelter(7389)

Record Type	Record Count	Client Count	Percentage of Clients with Records
Goals	1	1	100.00%
Case Notes	0	0	0.00%
Actionsteps	0	0	0.00%
Case Managers	0	0	0.00%
Infractions	0	0	0.00%





End of Quarter Reports

2nd Quarter of 2020 is ending

NCCEH Data Center recommends that all projects take some time to review this quarter's data.

- Does it make sense?
- Are there positive outcomes to celebrate?
- How does data quality look?



Use the right EDA mode

Used accurate EDA mode



Andrea Carey
System Admin II

North Carolina Coalition to End Homelessness

Heading Home - Rowan County

March 19, 2020

← Default EDA isn't the project I want

- Mode:
- Shadow housing
 - Enter Data As **Heading Home - Rowan ...**
 - Back Date
 - Connect To ART

Home > Home Page Dashboard

Type here for Global Search



Last Viewed Favorites

- Home
- ClientPoint
- ResourcePoint
- FundManager
- Reports
- Admin
- Logout

System News (16)

Agency News (0)

Follow Up List (0)

Date	Headline
03/18/2020	New data for COVID-19 Response
03/09/2020	Warning: Do Not Use Verify & Save
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend
02/17/2020	ART failed this morning (Updated 2.17)
11/06/2019	CoC-APR now ready for Sage
10/03/2019	New 2020 Data Standards, CoC-APR, and ESG-CAPER (Update)

View All

Client ID	Type	Date	Time Remaining
-----------	------	------	----------------

View All

Left-side Menu: Reports

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

Report Dashboard

Provider Reports

 Call Record Report	 Client Served Report	 CoC-APR	 Daily Unit Report	 Entry/Exit Report
 	 	 	 	



Find fast reports here



Run the Report

oint
Community.

h Carolina Coalition to End Homelessness

ing Home - Rowan County

9, 2020

Or use the ESG-CAPER!

Andrea Carey
System Admin II

Mode: Shadow housing

Enter Data As Heading Home - Rowan ...

Back Date

Connect To ART

s > CoC-APR 2019

Type here for Global Search

Report Options

Provider Type Provider Reporting Group

Provider* Heading Home - Rowan County - Emergency Shelter (7389) This provider AND its subordinates This provider ONLY

Program Date Range* 03 / 19 / 2020 to 03 / 19 / 2020

Entry/Exit Types* Basic Basic Center Program Entry/Exit HUD PATH Quick Call RHY Standard Transitional Living Program Entry/Exit VA HPRP (Retired)

Build Report Download Clear

Matches EDA mode!

What's your funding? (If not VA or PATH, choose HUD)



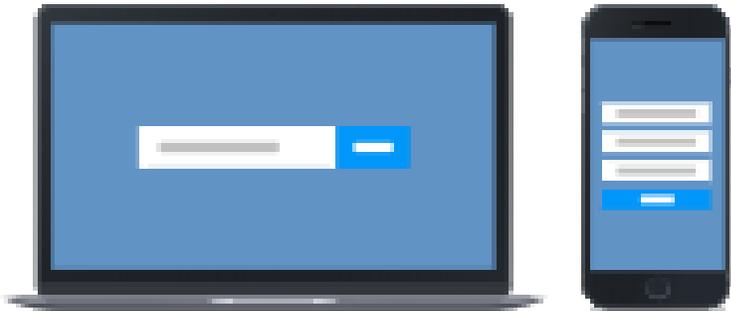
What's Next?

What's Next Calendar

Due	Report/Event Name
Mar 10 th	NC State of Emergency for COVID-19
Mar 18 th	COVID-19 Response questions in HMIS
July 16 th	Next NC BoS CoC HMIS Users Meeting
Aug/Sept	Longitudinal System Analysis Report
Oct 1 st	New CE Elements required in HMIS
	First quarterly ESG-CV reports anticipated deadline

Poll: Next HMIS Users Meeting Topics

Join by Web



- 1 Go to **Pollev.com**
- 2 Enter **ANDREACAREY147**
- 3 Respond to activity

Join by Text



- 1 Text **ANDREACAREY147** to **22333**
- 2 Text in your message

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