

# 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](https://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

2<sup>nd</sup> Quarter Recommended Report

## What's Next?



We are recording  
today's meeting



NCCEH

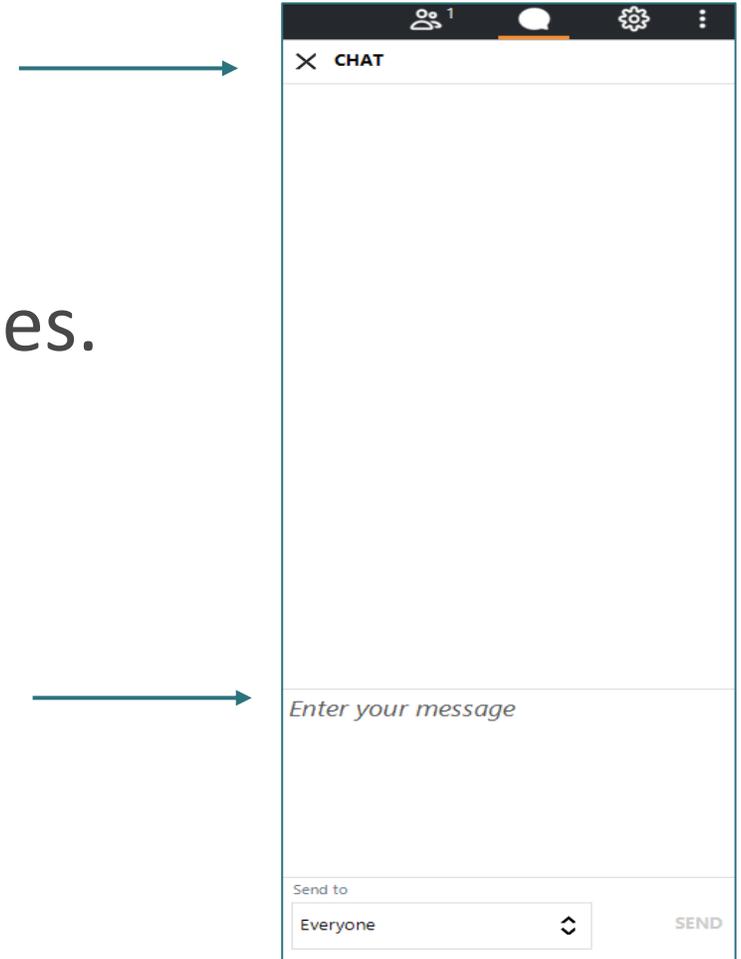
# Welcome

## Reminders

Your line is muted.

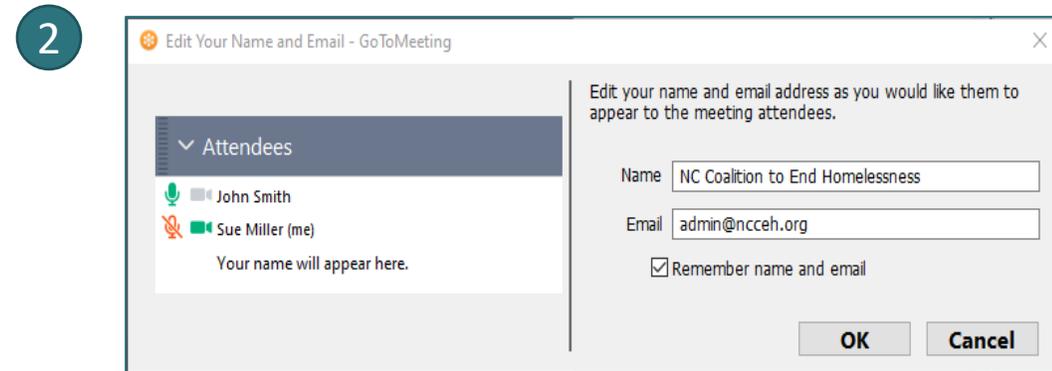
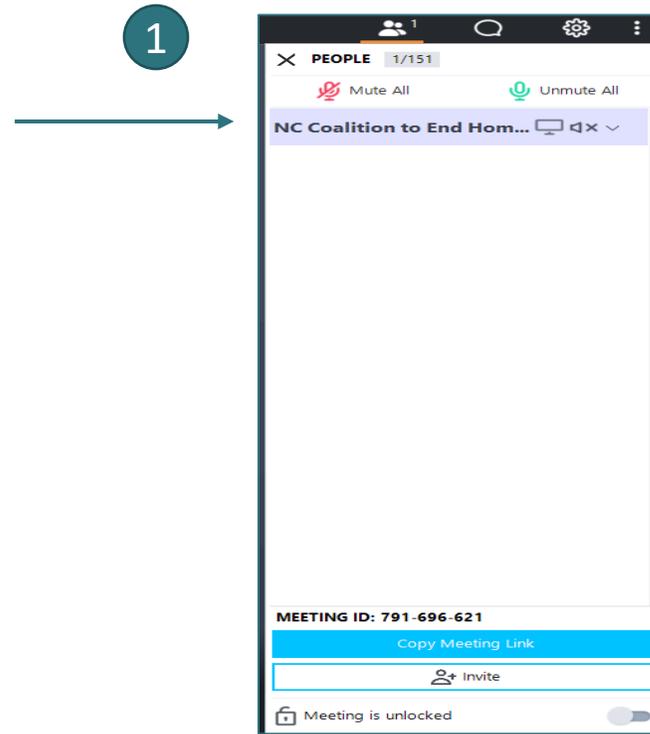
We will unmute the line during Q&A pauses.

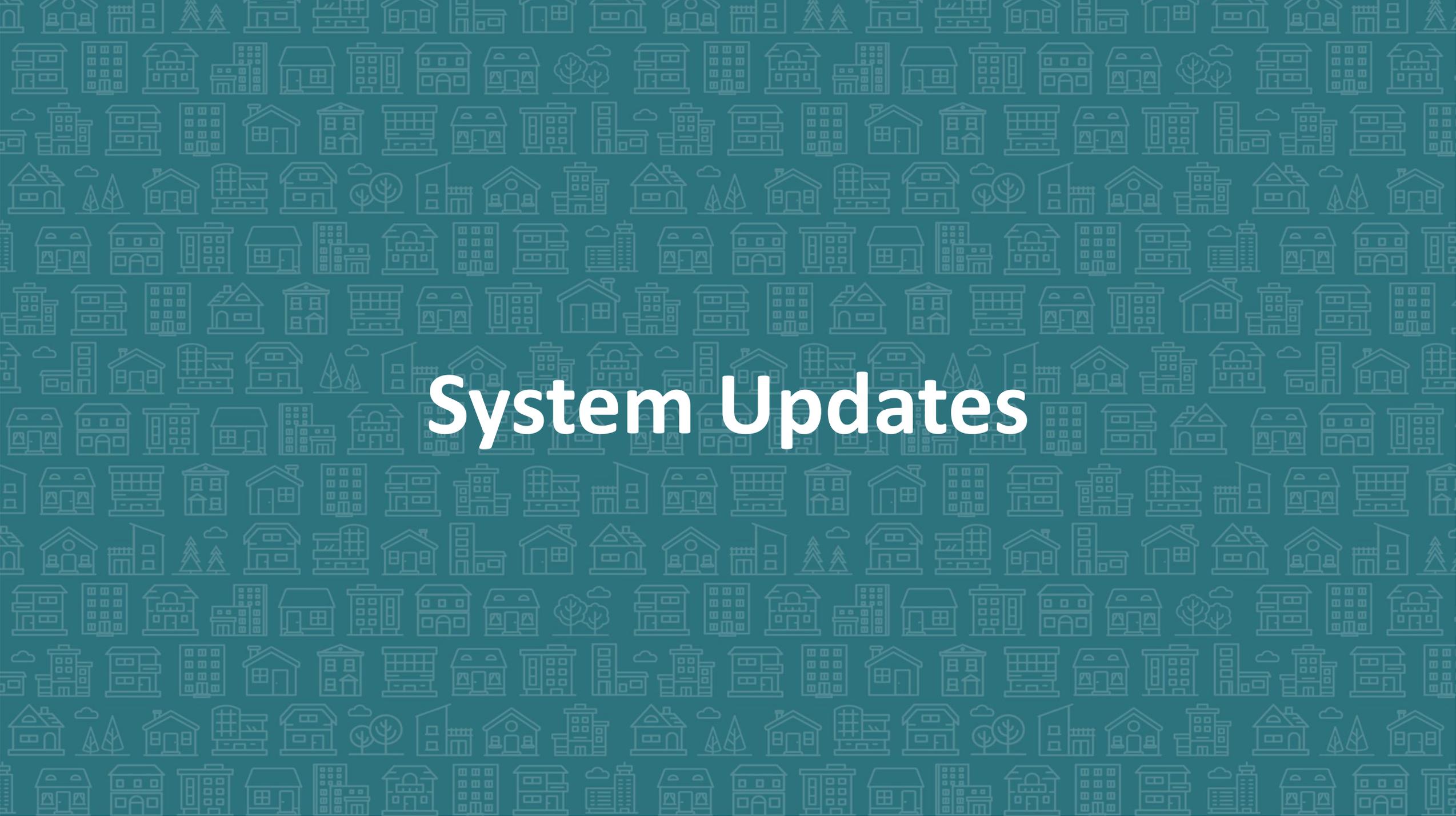
The chat box is available to use anytime.



# 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](mailto:Holly.A.Longley@irs.gov) Phone: 919-850-1123

## Key Information:

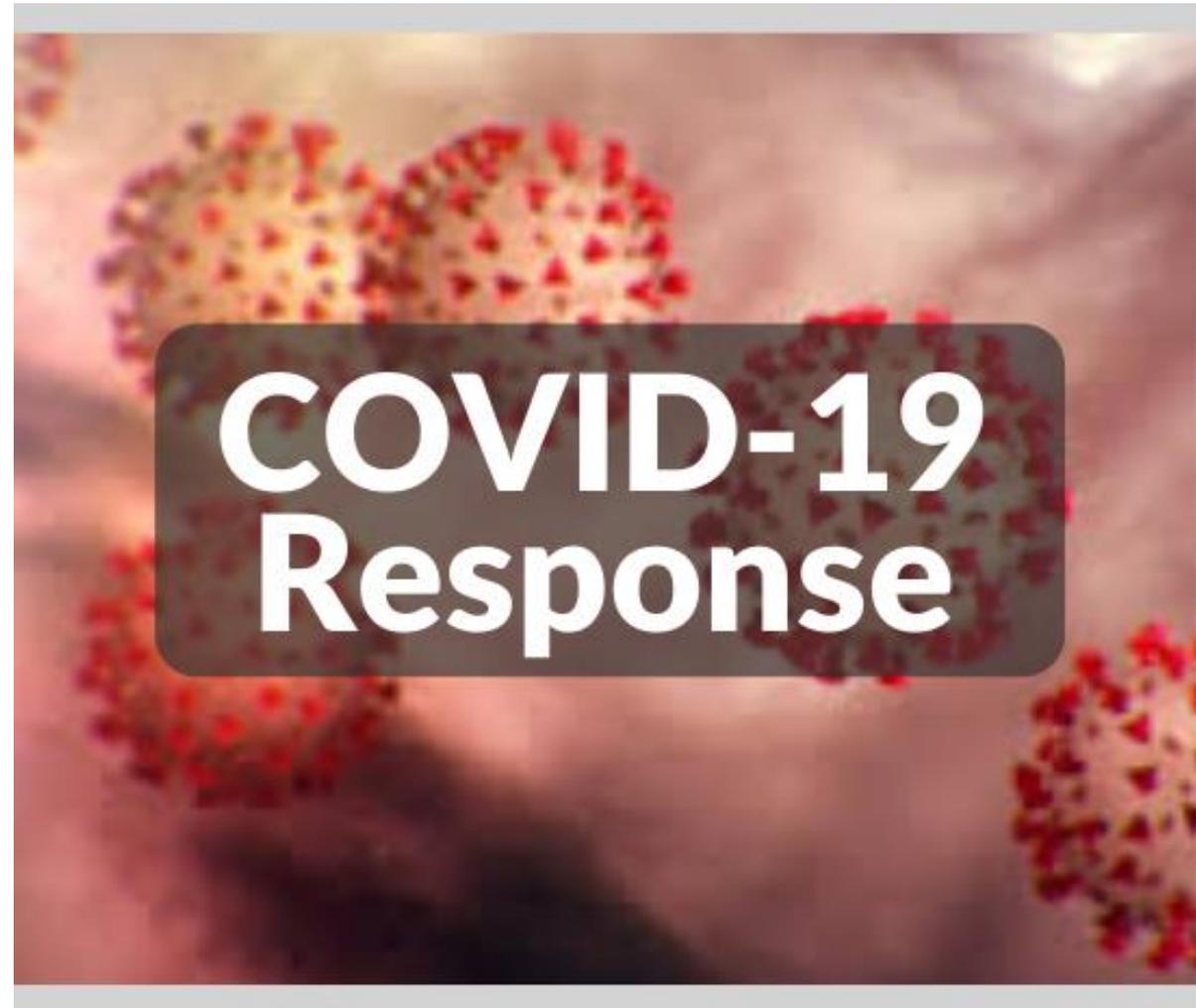
- [www.irs.gov/nonfilereip](http://www.irs.gov/nonfilereip)
- More information is being added to [IRS.gov/coronavirus](http://IRS.gov/coronavirus).
- You can find additional marketing materials and answers to frequently asked questions at [IRS.gov/eippartners](http://IRS.gov/eippartners).
- Please follow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

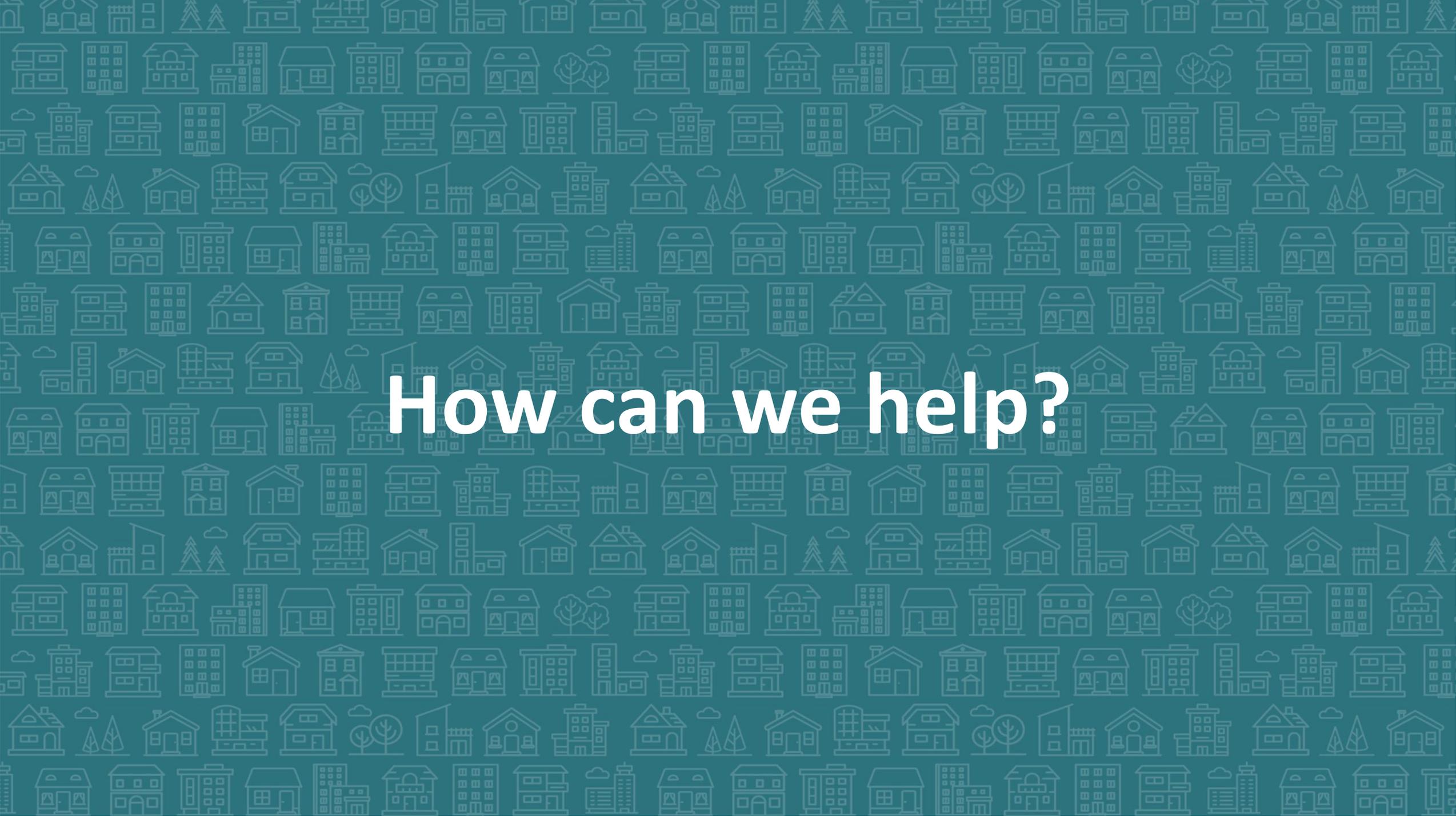


# COVID-19 Response in HMIS

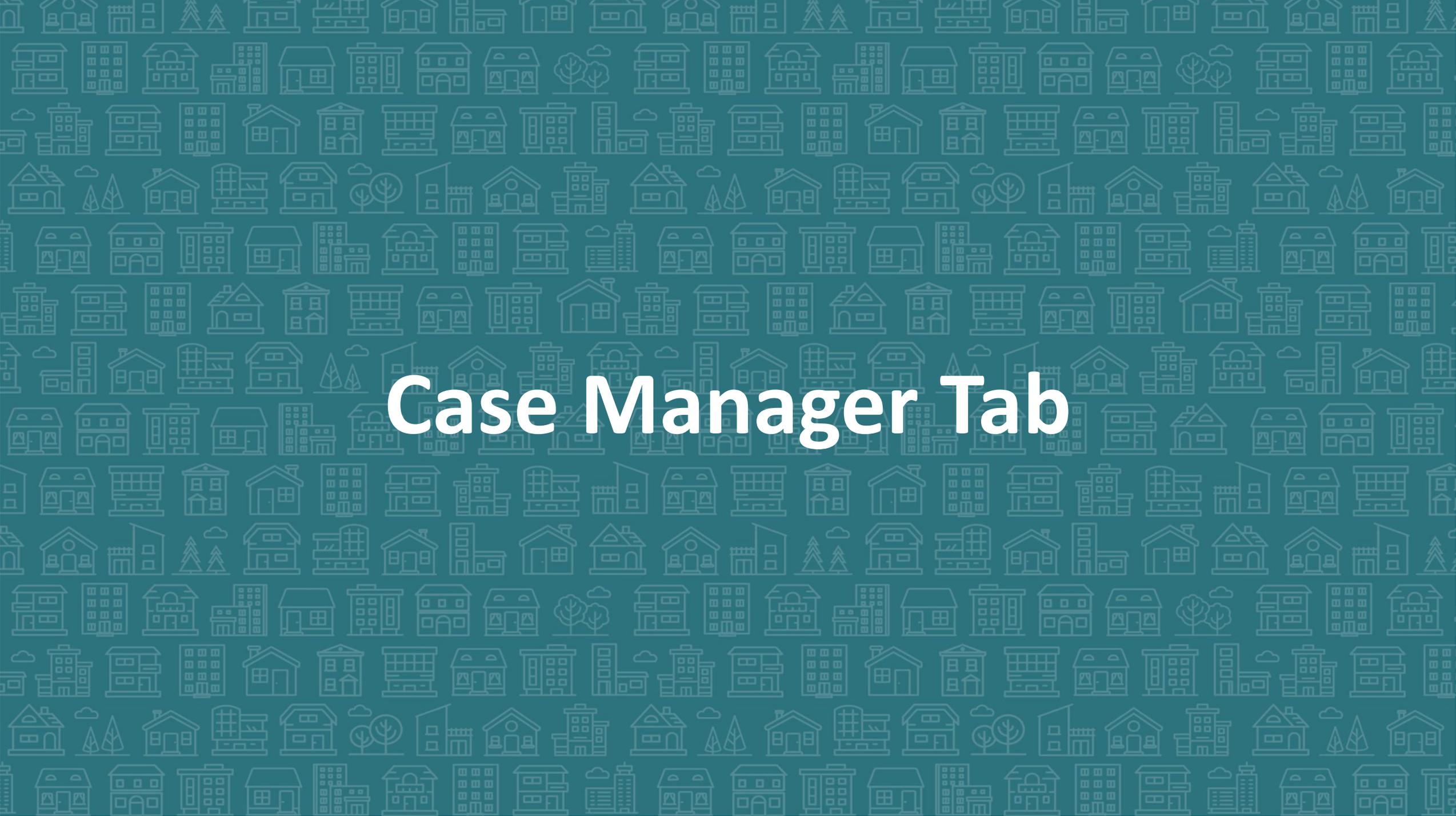
- Why Collect Data
- Sharing and Privacy Concerns
- Why these Questions
- Who to Collect and Enter Data for
- Where to Find Questions
- How to Enter Data
- Other Data Considerations

↑ Find all this and more at  
[nccch.org/hmis/training](https://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 shows the ServicePoint web application interface. At the top left is the ServicePoint logo with the tagline 'Connecting Your Community'. The main header area displays 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'. Two green arrows point from the text 'Default EDA mode vs Manual EDA mode' to the 'Enter Data As' dropdown and the case title area respectively.

Home > Home Page Dashboard

**Last Viewed** | **Favorites**

- Home
- ClientPoint
- ResourcePoint
- ▶ FundManager
- ShelterPoint
- ▶ Reports
- ▶ Admin

**System News (18)** | **Agency News (1)**

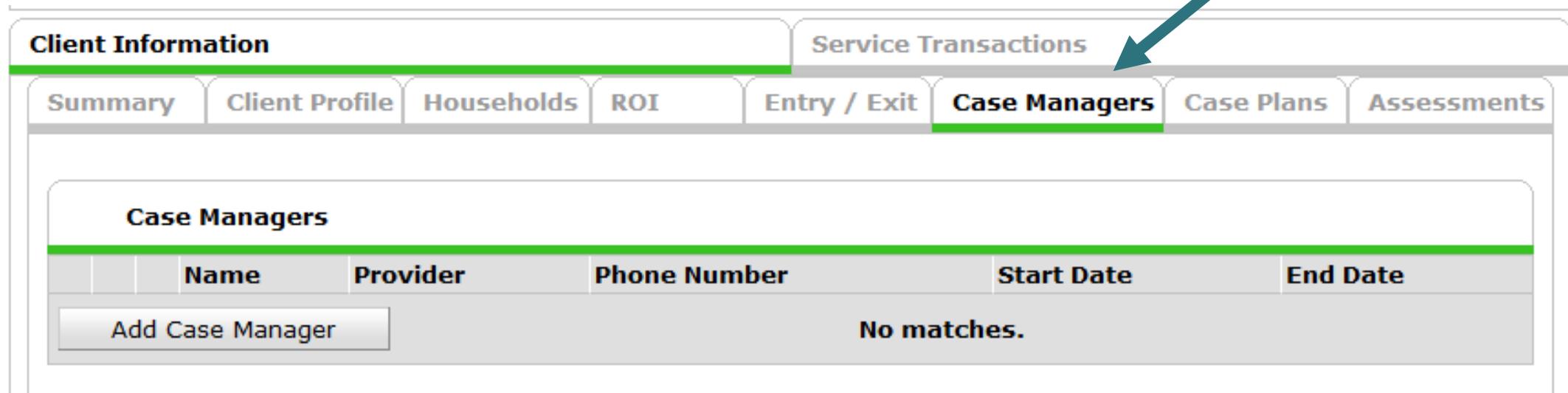
Date	Headline
06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight
04/10/2020	Updated COVID-19 questions + guidance
03/18/2020	New data for COVID-19 Response
03/09/2020	Warning: Do Not Use Verify & Save
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend

**Follow Up List (0)**

Client ID	Type	Date	Time Remaining
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# 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 \*  
Heading Home - Rowan County (7388) ▼  
-Select- ▼

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

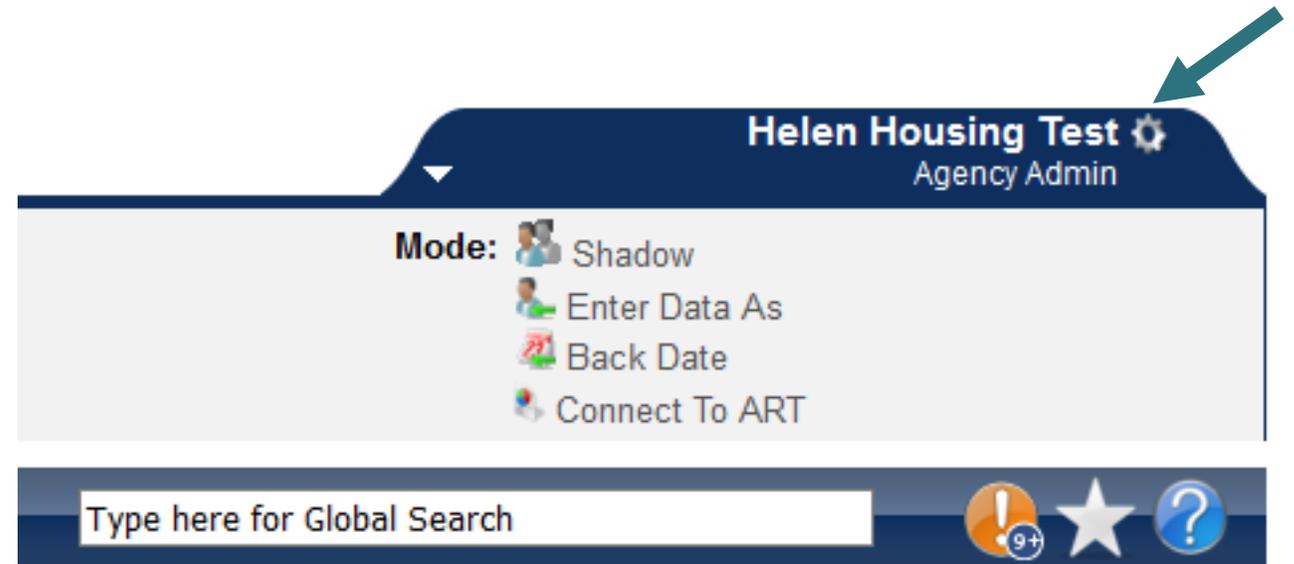
Phone Number

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](http://nccch.org/hmis/training)

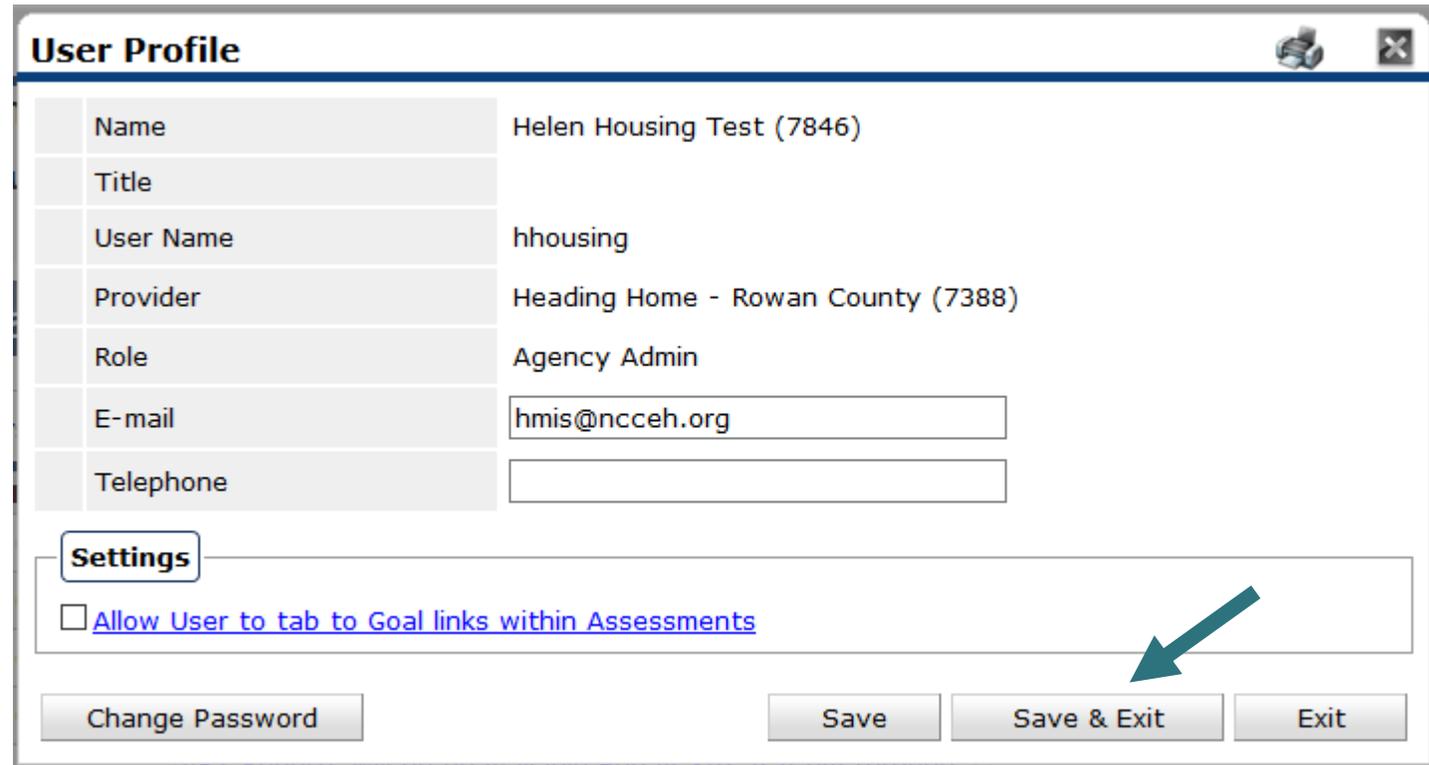
- Find the User Profile Setting icon



# 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](http://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](#)



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# 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

<b>Type *</b>	<input type="radio"/> <a href="#">ServicePoint User</a> <input checked="" type="radio"/> <a href="#">Me</a> <input type="radio"/> <a href="#">Other</a>
<b>Name *</b>	<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"/>
<b>Provider *</b>	<input type="text" value="Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)"/>
<b>Start Date *</b>	<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- ▾

Submit

## 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	

Add Case Manager

Showing 1-1 of 1

# Let's see this in action

HMIS@NCCEH training site for ServicePoint\*

[sp5.servicapt.com/hmisncceh\\_training](https://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.



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

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

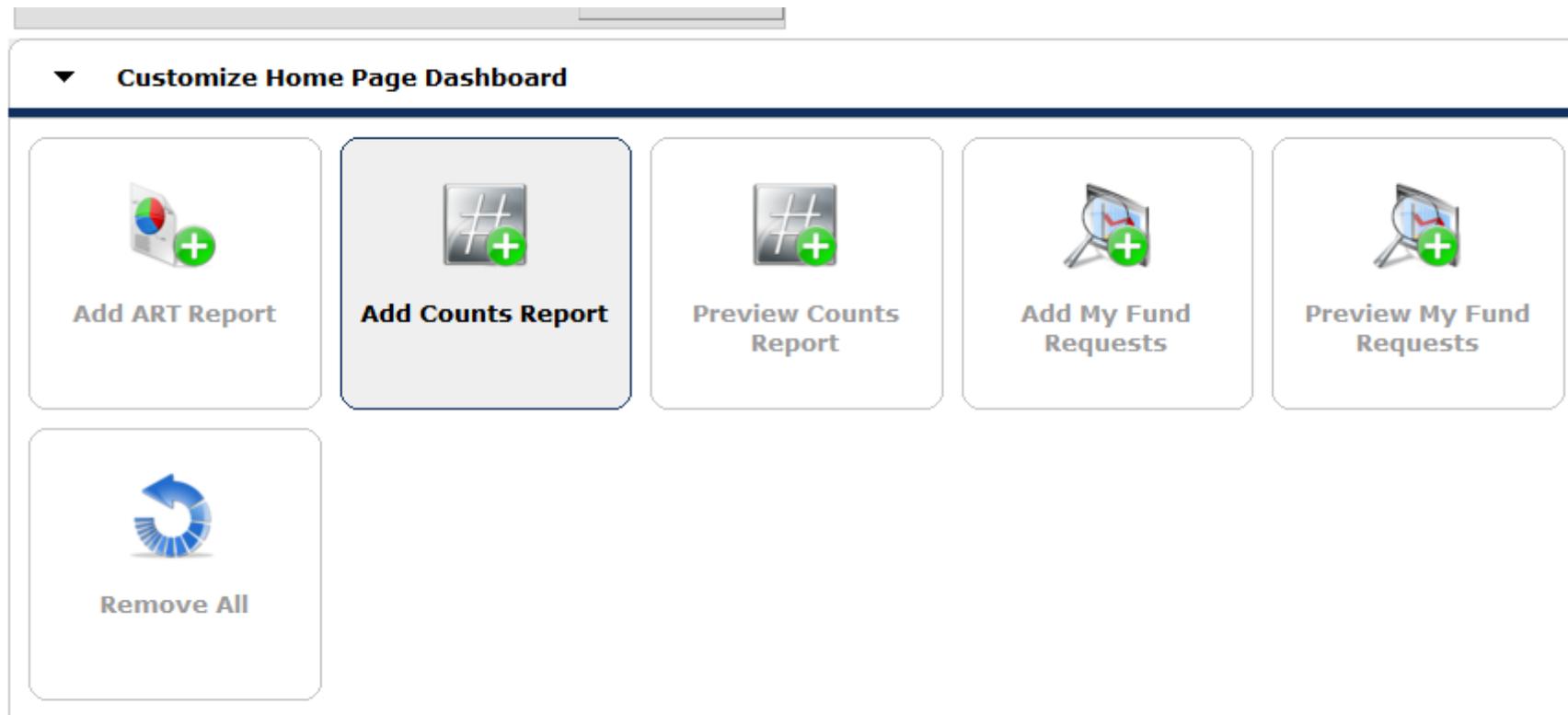
Client ID	Type	Date	Time Remaining
-----------	------	------	----------------

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 arranged in a row, and one additional widget below them on the left. Each widget contains an icon and a text label. The 'Add Counts Report' widget is highlighted with a grey background.

Widget Label	Icon Description
Add ART Report	Icon of a pie chart with a green plus sign.
<b>Add Counts Report</b>	Icon of a grey square with a white hash symbol and a green plus sign.
Preview Counts Report	Icon of a grey square with a white hash symbol and a green plus sign.
Add My Fund Requests	Icon of a presentation board with a red line graph and a green plus sign.
Preview My Fund Requests	Icon of a presentation board with a red line graph and a green plus sign.
Remove All	Icon of a blue circular arrow.

# 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]

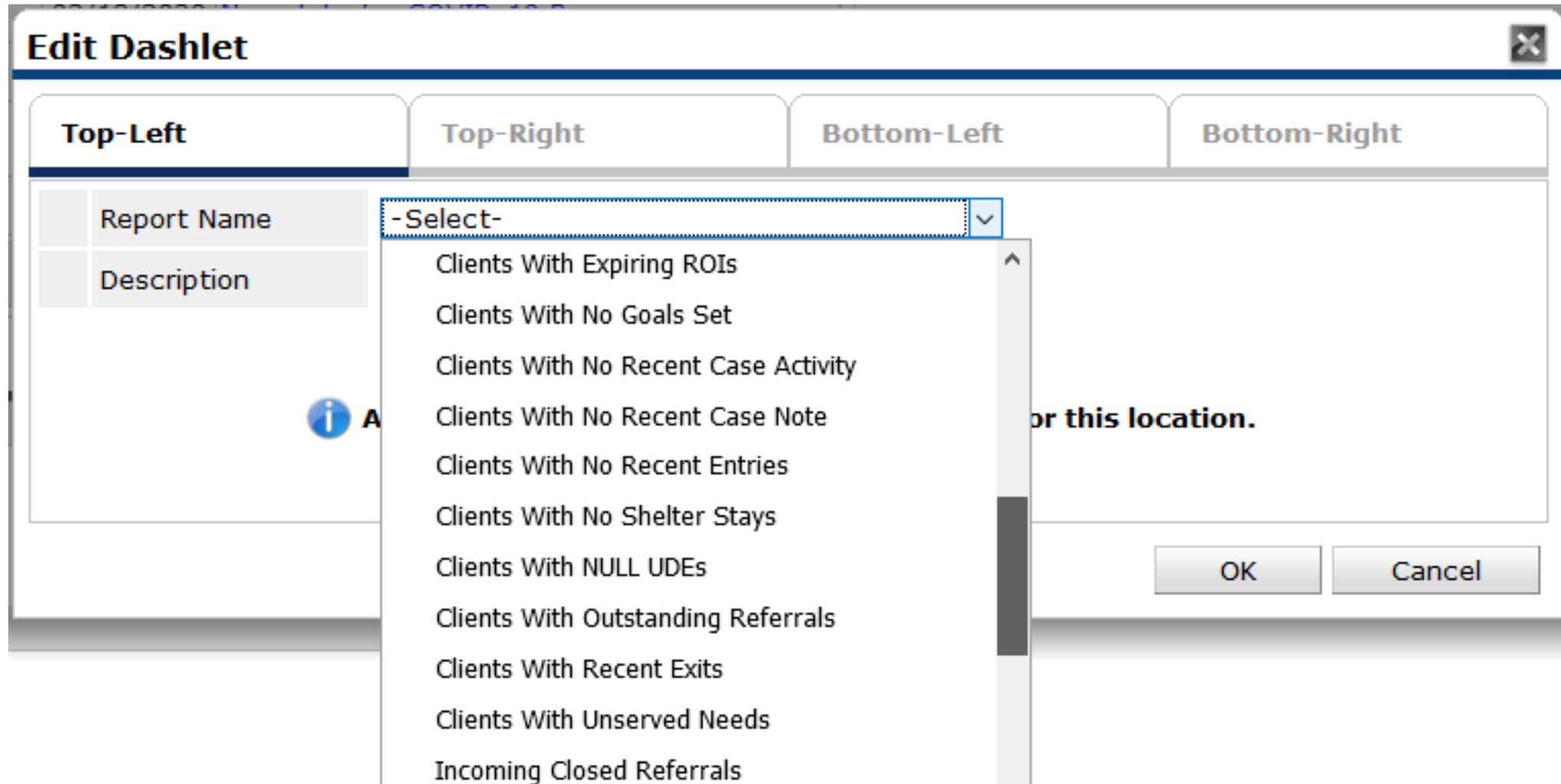
Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	-Select- [v]		
Description	N/A		

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

OK Cancel

# Set-Up Counts Reports

- Standard list to choose from

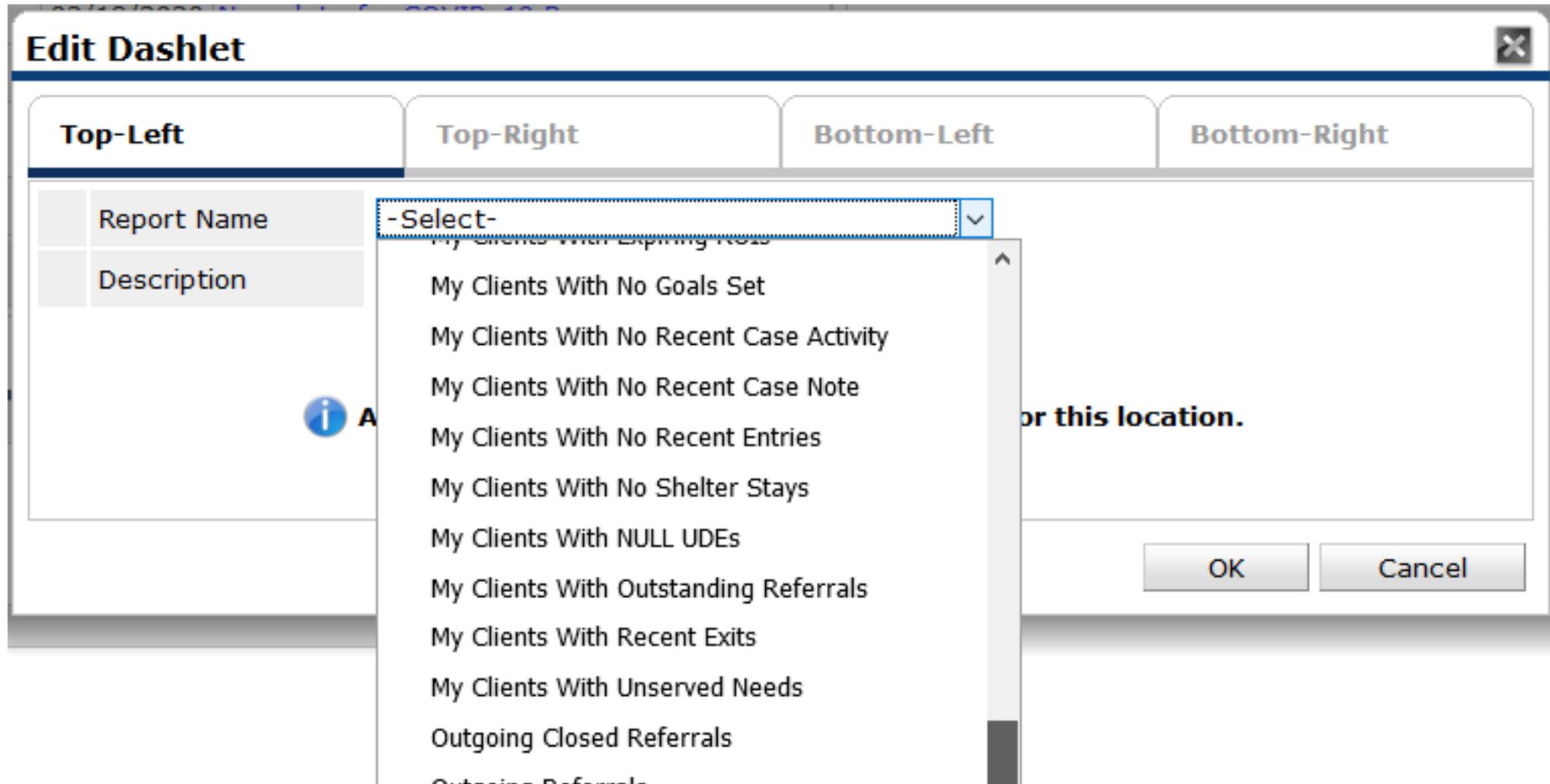


The screenshot shows a software window titled "Edit Dashlet" with a close button in the top right corner. The window is divided into four quadrants: "Top-Left", "Top-Right", "Bottom-Left", and "Bottom-Right". The "Top-Left" quadrant contains a table with two rows: "Report Name" and "Description". A dropdown 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 and 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: '- Select -', 'My Clients With Expiring Needs', '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 Expiring Needs	
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	

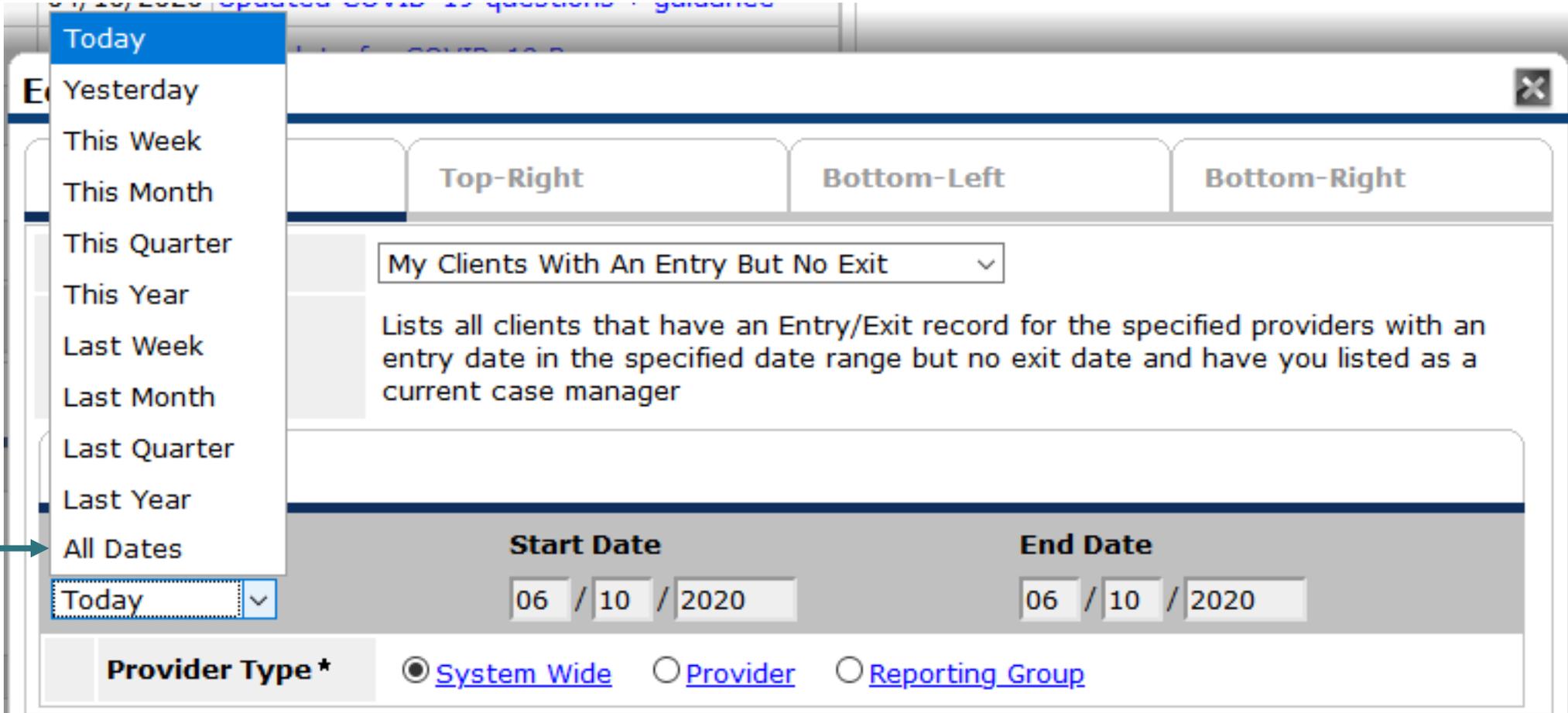
# Set-Up Counts Reports

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

The screenshot shows a dialog box titled "Edit Dashlet" with a close button in the top right corner. The dialog is divided into four quadrants: Top-Left, Top-Right, Bottom-Left, and Bottom-Right. In the Top-Left quadrant, there is a "Report Name" dropdown menu set to "My Clients With An Entry But No Exit" and a "Description" text area containing the text: "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". The Bottom-Left quadrant is titled "Filters" and contains a "Select Dates" dropdown menu set to "Today", a "Start Date" field with the value "06 / 10 / 2020", and an "End Date" field with the value "06 / 10 / 2020". Below the date fields is a "Provider Type \*" section with three radio button options: "System Wide" (which is selected), "Provider", and "Reporting Group". At the bottom right of the dialog are "OK" and "Cancel" buttons.

Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name			
Description			
<b>Filters</b>			
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		

# Set-Up Counts Reports



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

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

For all current clients



# Set-Up Counts Reports

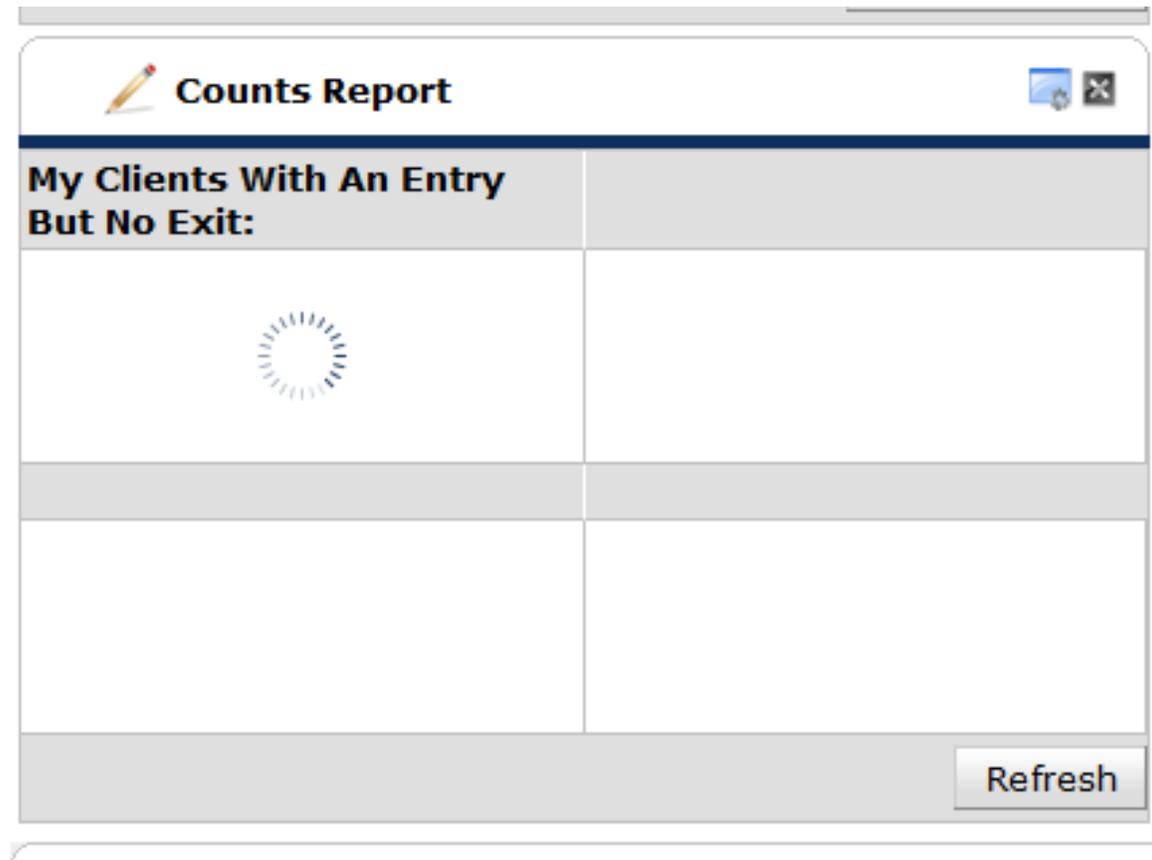
- Provider lets you select the entire agency (incl. subordinates) or not

### 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		
<b>Filters</b>			
<b>Select Dates</b>		<b>Start Date</b>	<b>End Date</b>
Today		06 / 10 / 2020	06 / 10 / 2020
<b>Provider Type *</b>	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group		
<b>Provider *</b>	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

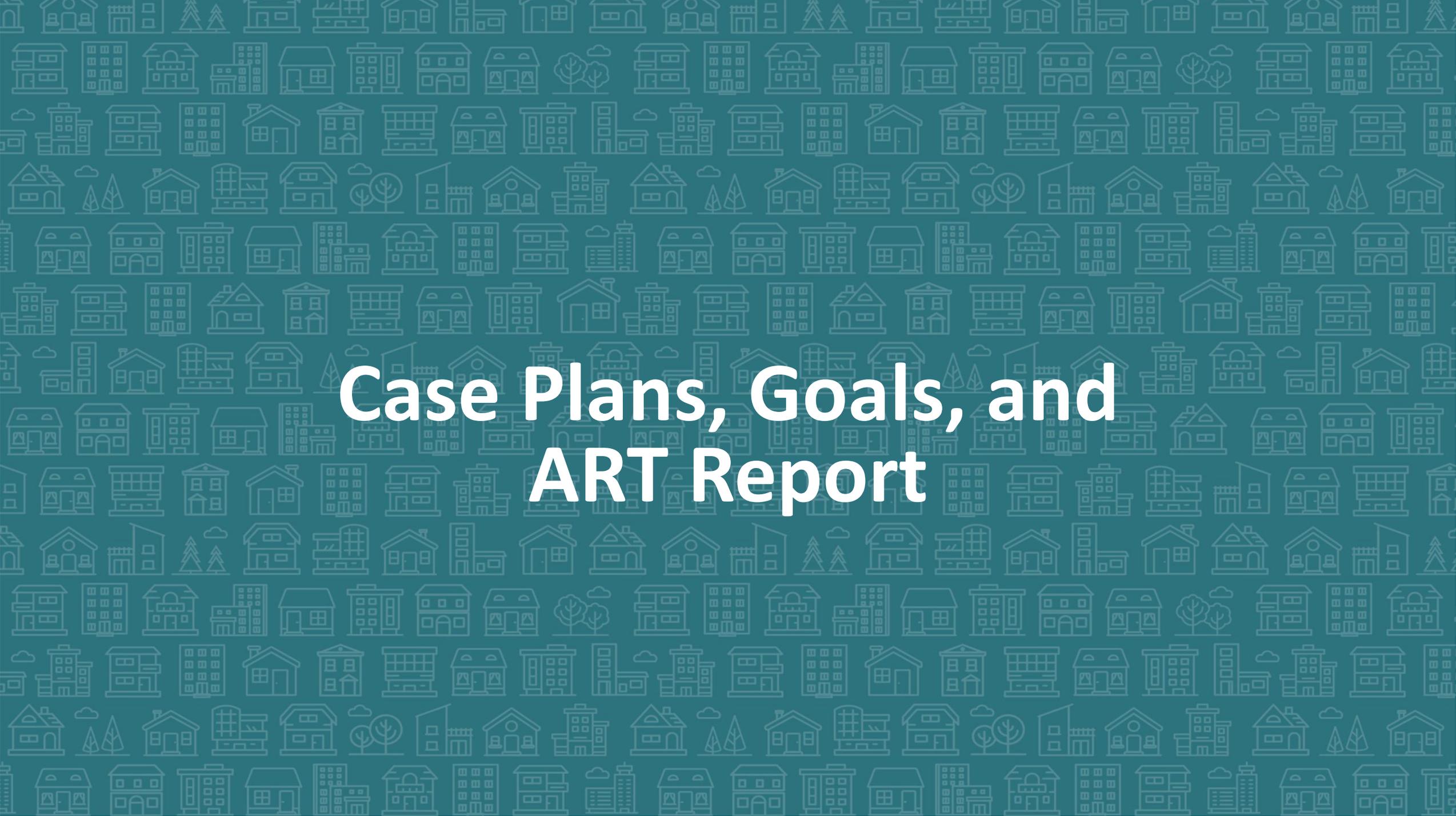


# Home Page Counts Dashlet Reports

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**

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**Client Information** | Service Transactions

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

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**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	
<b>Add Goal</b>		<b>No matches.</b>				

- Add the Case Manager

**Goal**

**Goal - (52) Funday, Sunday**

▼ **Household Members**

This Client is not a member of any Households.

<b>Provider *</b>	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▼
Case Manager	-Select- ▼
<b>Date Goal was Set *</b>	-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

<b>Date Goal was Set</b> *	06 / 09 / 2020   
<b>Classification</b> *	Education 
<b>Type</b> *	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   
<b>Overall Status</b> *	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   
<b>Overall Status</b> *	<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><b>In Progress</b></p><p>-Select- ▾</p></div>
If Closed, Outcome	ved ▾ <span style="margin-left: 200px;">09 / 09 / 2020   </span>
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   
<b>Overall Status</b> *	In Progress ▾
If Closed, Outcome	Partially achieved ▾ <span style="float: right;">09 / 09 / 2020   </span>
If Partially Complete, Percent Complete	<div style="border: 1px solid gray; padding: 5px;"><p>Partially achieved ▾</p><p>-Select-</p><p>Abandoned</p><p>Achieved</p><p><b>Partially achieved</b></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	  
<b>Overall Status*</b>	Closed	
If Closed, Outcome	Partially achieved	07 / 20 / 2020   
If Partially Complete, Percent Complete	50%	

# 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



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# 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.

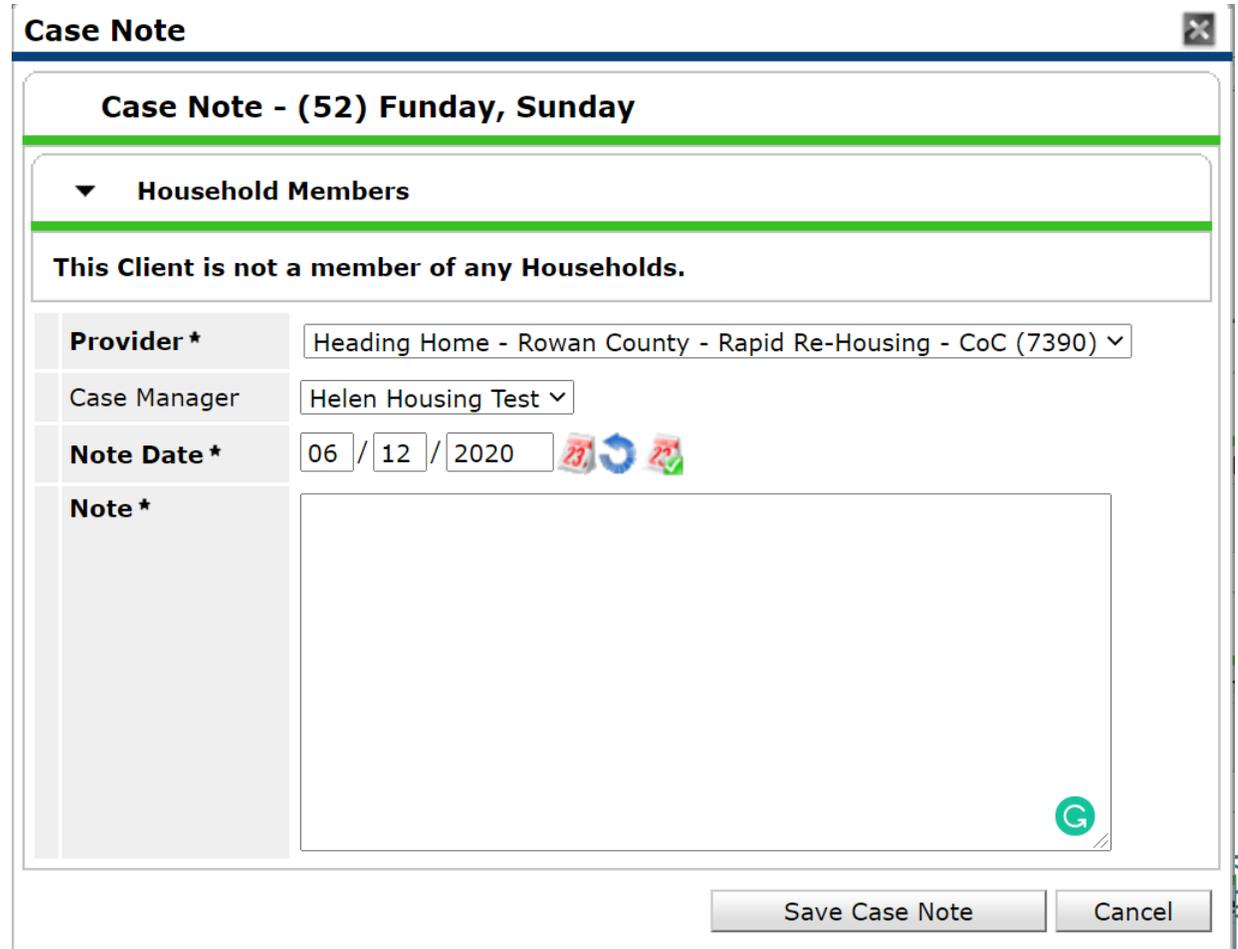
Print	Save Goal	Save & Exit	Exit
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# How to add Case Notes

## 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 small icons: a calendar, a refresh/clock icon, 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

<b>Provider *</b>	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▾				
<b>Date Action Step was set</b>	06 / 12 / 2020				
<b>Action Step *</b>	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <div style="text-align: right; margin-top: 5px;"> </div>				
Target Date	/ /				
<b>Overall Status *</b>	-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	
<b>Add Service</b>			
▼ Household Members			
This Client is not a member of any Households.			
<b>Service Provider *</b>	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) ▼		
Creating User	Andy Phillips		
<b>Start Date *</b>	06 / 12 / 2020	10	: 51 : 35 AM
End Date	/ /		: : :
<b>Service Type *</b>	-Select- ▼		Look Up
Provider Specific Service	-Select- ▼		
		Save & Continue	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

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#

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**Casenote Provider:**

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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

<b>Heading Home - Rowan County - Emergency Shelter(7389)</b>			
<b>Record Type</b>	<b>Record Count</b>	<b>Client Count</b>	<b>Percentage of Clients with Records</b>
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

# 2<sup>nd</sup> 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
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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  
unity.

North Carolina Coalition to End Homelessness

Heading Home - Rowan County

03/19/2020

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)



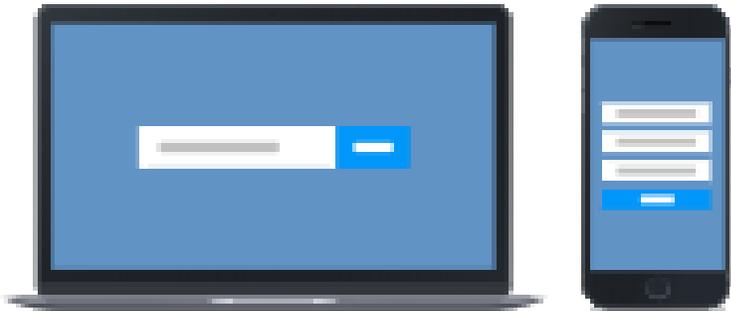
# What's Next?

# What's Next Calendar

Due	Report/Event Name
Mar 10 <sup>th</sup>	NC State of Emergency for COVID-19
Mar 18 <sup>th</sup>	COVID-19 Response questions in HMIS
July 23 <sup>rd</sup>	Next Durham CoC HMIS Users Meeting
Aug/Sept	Longitudinal System Analysis Report
Oct 1 <sup>st</sup>	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