

# HMIS@NCCEH

## CoC HMIS Users Meeting

October 2020



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

# Agenda

October 2020

## System Updates

Annual Privacy Training

CE Elements: Training, workflow, & new paper forms

## How can we help

LSA corrections

Avoid big scary correction lists

Adding new clients to entries – aka BABIES!

## What's Next?



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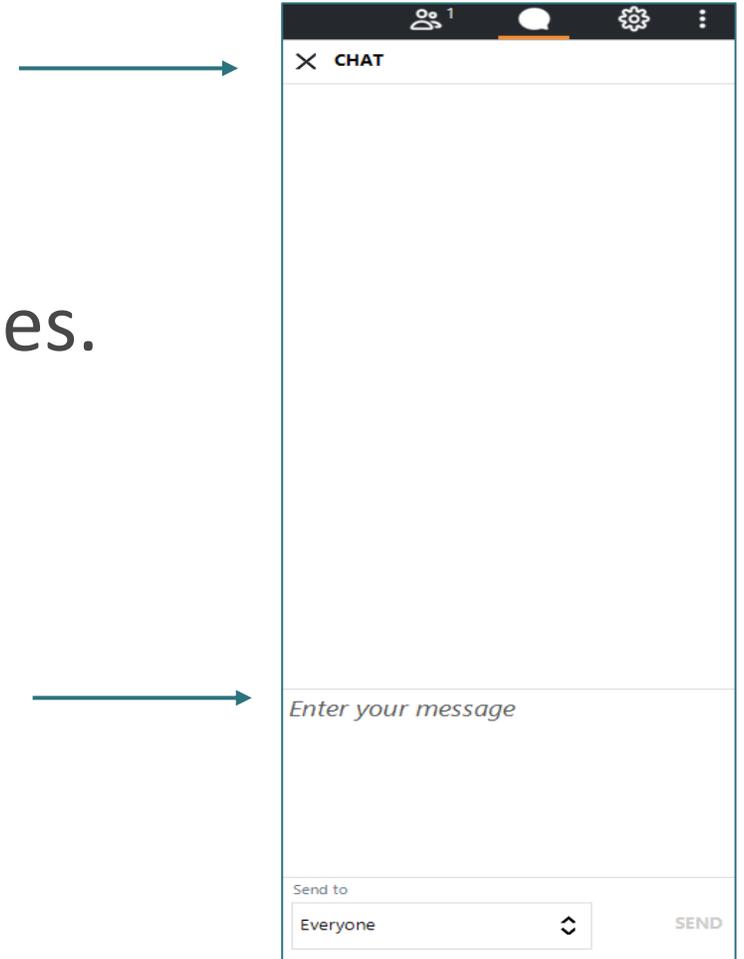
# Welcome

## Reminders

Your line is muted.

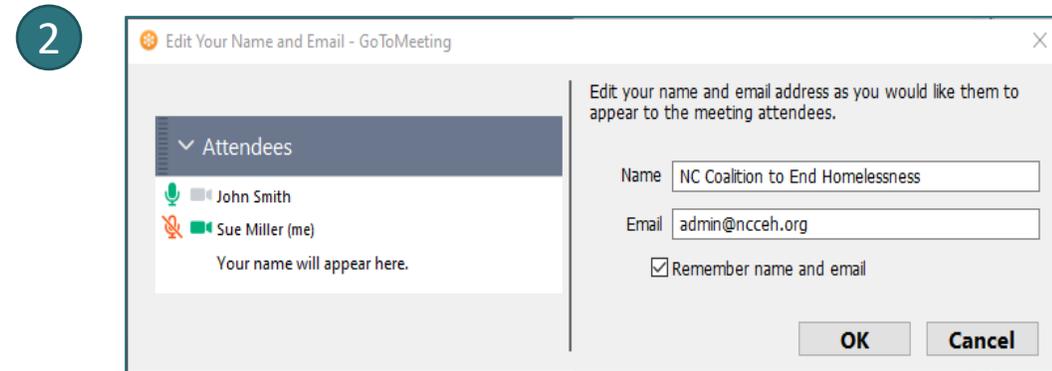
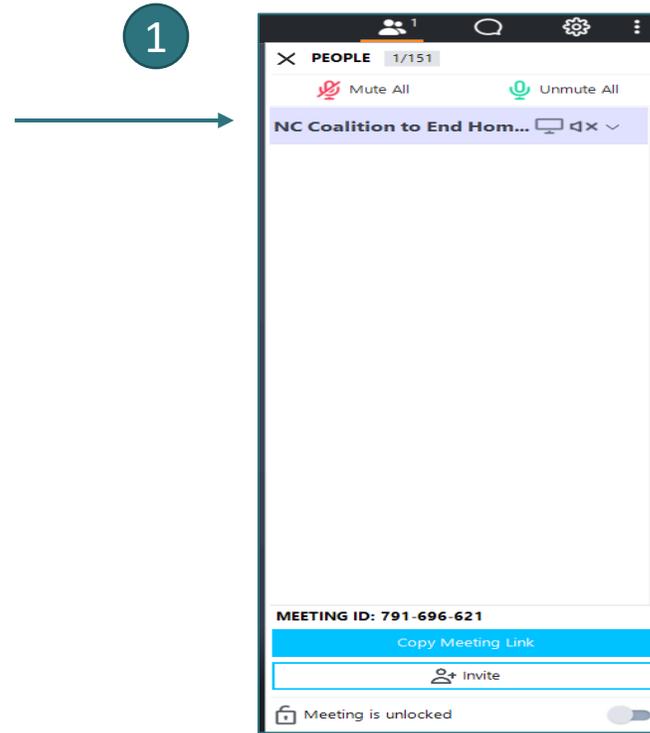
We will unmute the line during Q&A pauses.

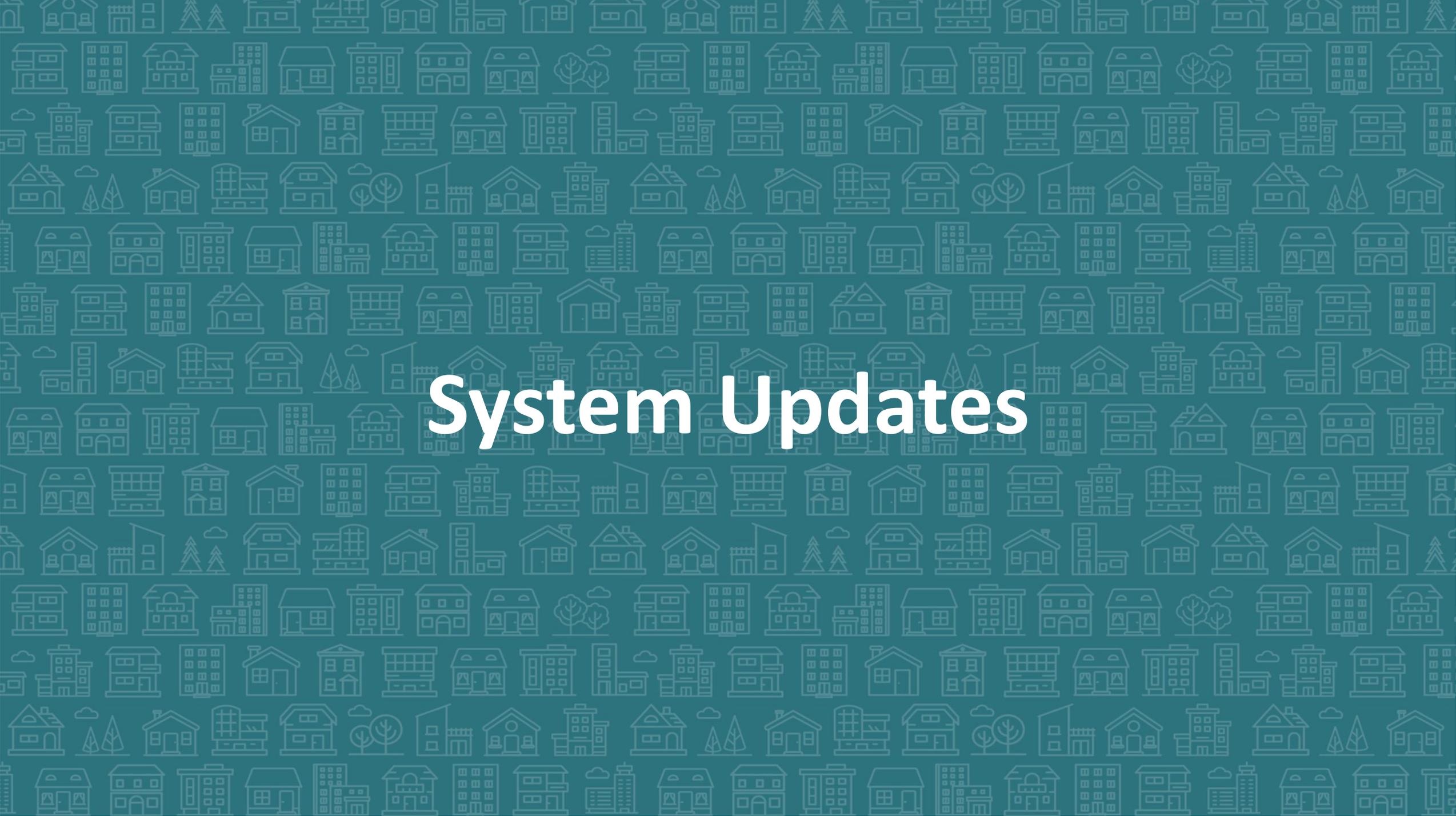
The chat box is available to use anytime.



# 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”





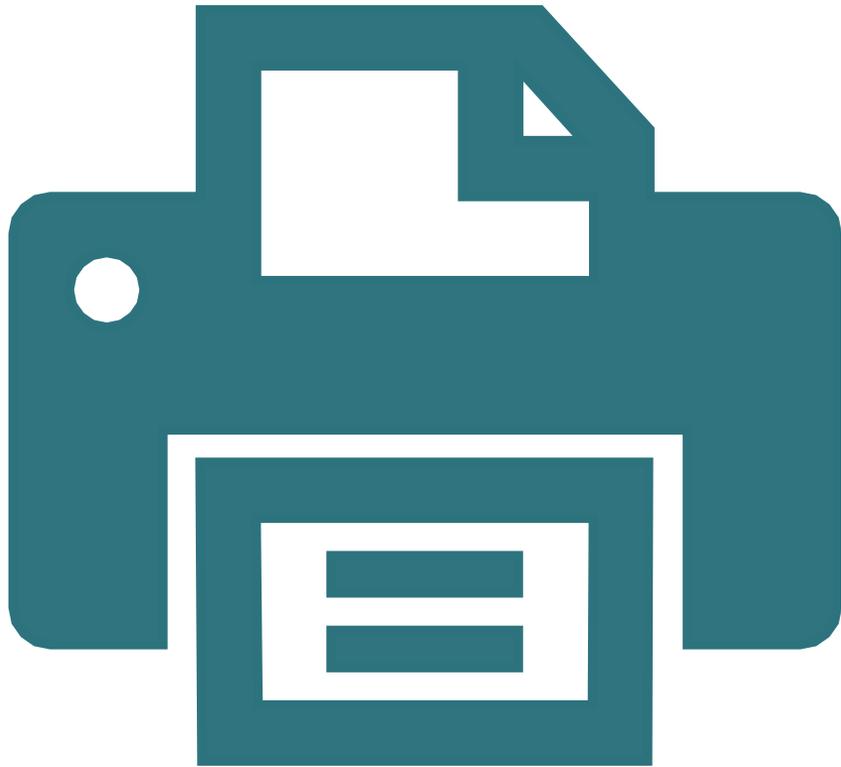
# System Updates

# Annual Privacy Training

- We finished our Annual Privacy Training on Oct. 6th
- 86% took the quiz and passed!!!
- If you didn't take your quiz, you were notified via a HelpDesk ticket
  - Your HMIS license was also inactivated, allowing no access to HMIS
- Agency Admins please check in with your users to see if they completed



# New Coordinated Entry Data Elements



## New Paper Assessments

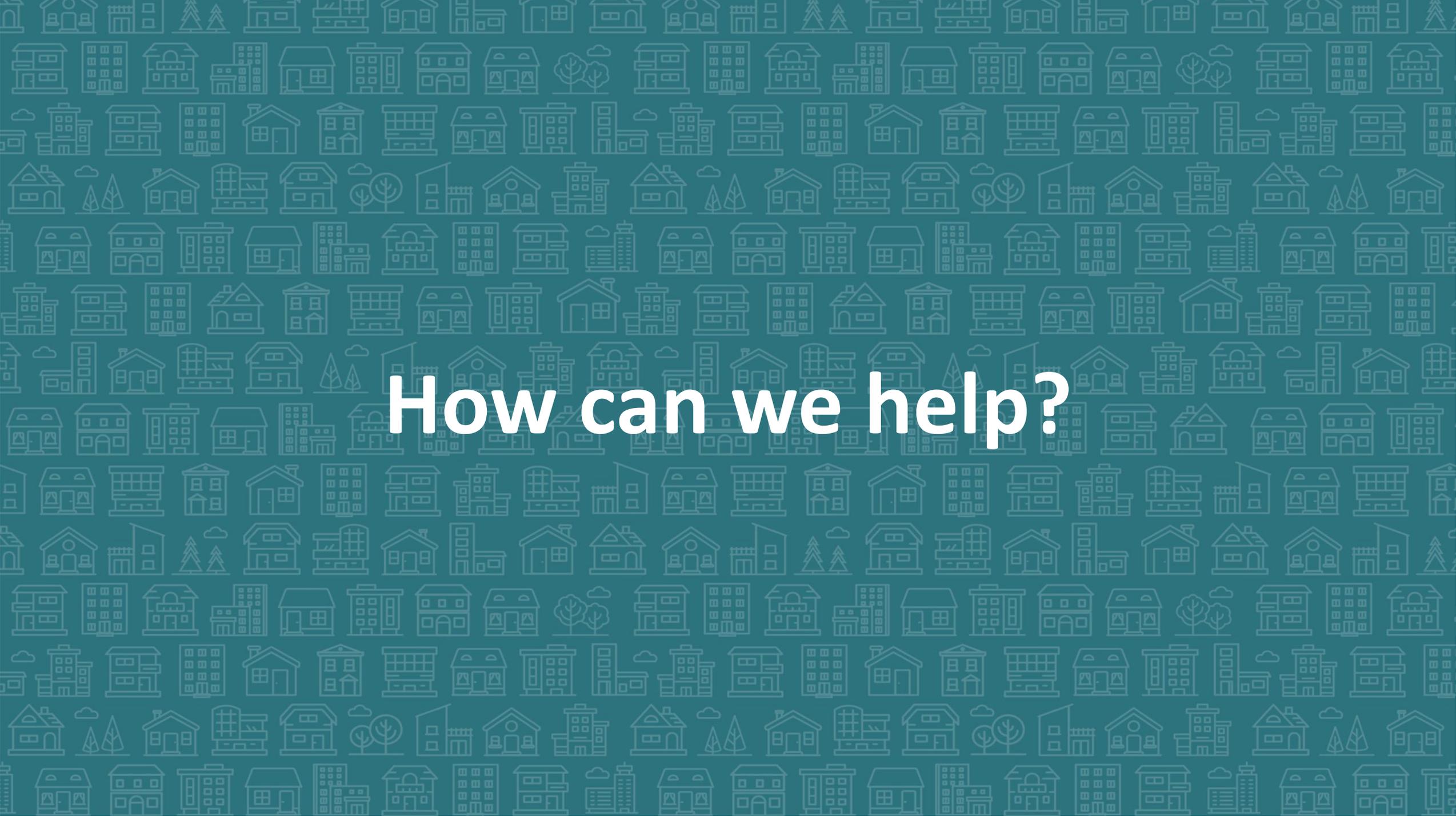
- Paper forms for all projects
- Now posted:  
[ncceh.org/hmis/admin](https://ncceh.org/hmis/admin)
- ESG forms have also been updated



# New Coordinated Entry Data Elements

| Project Type  | CE Assessment                    | CE Event          | Current Living Situation |
|---------------|----------------------------------|-------------------|--------------------------|
| HUD SSO-CE    | Yes                              | Yes               | Yes                      |
| Other CE BNLs | BoS + Orange only                | BoS + Orange only | BoS + Orange only        |
| SSO           | BoS + Orange only                | BoS + Orange only | BoS + Orange only        |
| SO            | BoS + Orange only                | BoS + Orange only | Yes                      |
| ES            | BoS + Orange only                | BoS + Orange only | N/A                      |
| TH            | BoS + Orange only                | BoS + Orange only | N/A                      |
| RRH           | VA projects in BoS + Orange only | BoS + Orange only | N/A                      |
| PSH           | VA projects in BoS + Orange only | BoS + Orange only | N/A                      |





**How can we help?**



# LSA Report Corrections

# LSA Reporting Correction Waves

| Wave: Due Date       | Time Period   | Data Corrections Included  |
|----------------------|---------------|--|
| Wave 1:<br>Due 09/25 | 09/14 - 25    | <ul style="list-style-type: none"><li>• Data quality/completeness (demographics, homeless history, UDE's, etc.)</li></ul>  |
| Wave 2:<br>Due 10/09 | 09/30 – 10/09 | <ul style="list-style-type: none"><li>• All outstanding corrections from Wave 1</li><li>• Locations (Client Location and NC County of Service)</li></ul>         |
| Wave 3:<br>Due 10/23 | 10/14 - 23    | <ul style="list-style-type: none"><li>• All outstanding corrections from Waves 1 &amp; 2</li><li>• Long stayers, Returns, and Annual Assessment errors</li></ul> |



# BoS Corrections!

We're making progress, but we still need your help! Let's celebrate reviews so far:

Issues Confirmed: 1233

Issues Corrected: 364



# Report Corrections FAQs

## How often should agencies expect updates?

- Once a week

## What are we expecting from agencies?

- List of client issues reviewed or corrected

## What are the possible responses to a list of corrections?

- It's corrected! (yay!)
- I cannot correct it. (confirmed)
- It looks correct when I look at this.



# How to avoid BIG SCARY Correction lists



Review reports in internal staff meetings



Review in leadership meetings



At least monthly and quarterly reviews



Run more frequent DQ reports when you have new users





# BABIES

Or, how to add a new client to an existing entry

# Adding new clients to entries – aka BABIES

## Remember:

- Date of Birth and Relationship to Head of Household designations are important to reporting and determining household composition.
- Review the [Data Standards Training on Demographics](#) for more on how and why we collect these elements.

## Impact:

- Relationship to Head of Household and Age determines how and which clients and families are included in HUD's Longitudinal Systems Analysis.

# Adding new clients to entries – aka BABIES

## Basic Steps:

1. Determine the child's Head of Household
2. Add the child to the Household
3. Add the child to the Project Start

**KEEP  
CALM  
IT'S AS EASY AS  
1, 2, 3**



# Adding new clients to entries – aka BABIES

## Determine the child's Head of Household:

1. Pull the client's paper file
2. Determine the child's Head of Household (specifically the client ID)

**Client - (4) Solo, Han**



(4) Solo, Han



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# Adding new clients to entries – aka BABIES

## Add the child to the Household:

1. Check your default EDA mode; if not your household's project, manually change EDA mode
2. Set the Back Date mode
3. Go to the Head of Household's profile
4. Click their Household tab
5. Click Manage Household

**Client Information**

Summary Client Profile **Households**

▼ **(125413) Single Parent**

**Name**

(4) Solo, Han

(501224) Solo, Ben

Manage Household

# Adding new clients to entries – aka BABIES

## Add the child to the Household:

6. Click Add/Delete Household Members for more detail

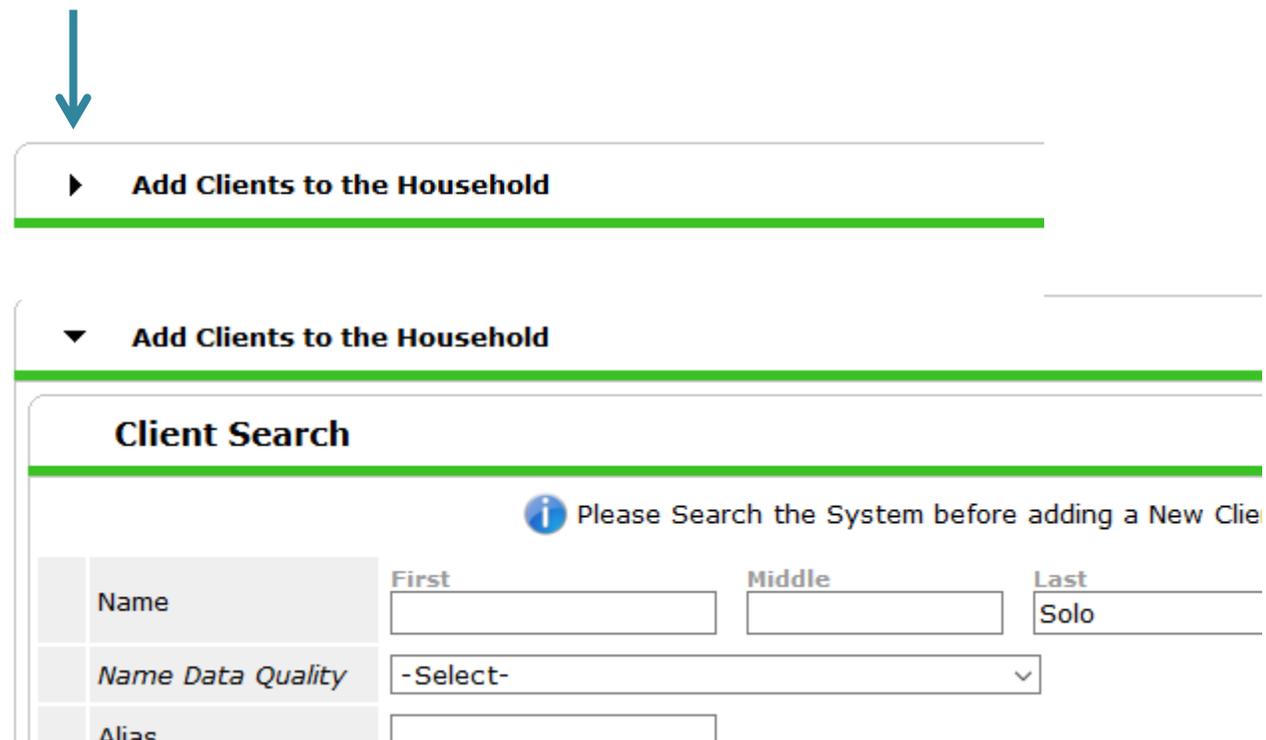
| Household Members   |                    |     |                                    |                                     |
|---|--------------------|-----|------------------------------------|-------------------------------------|
|   | Name               | Age | Head of Household                  | Relationship to Head of Household   |
|  | (4) Solo, Han      | 42  | Yes <input type="text" value="v"/> | Self <input type="text" value="v"/> |
|  | (501224) Solo, Ben | 21  | No <input type="text" value="v"/>  | son <input type="text" value="v"/>  |
| Add/Delete Household Members  |                    |     |                                    |                                     |



# Adding new clients to entries – aka BABIES

## Add the child to the Household:

6. Open the Add Clients section by clicking the black arrow
7. Now you have a search area to find an existing client ID or add a new profile to HMIS



▶ Add Clients to the Household

▼ Add Clients to the Household

### Client Search

*i* Please Search the System before adding a New Client

|                   |                      |                      |                                   |
|-------------------|----------------------|----------------------|-----------------------------------|
| Name              | First                | Middle               | Last                              |
|                   | <input type="text"/> | <input type="text"/> | <input type="text" value="Solo"/> |
| Name Data Quality | -Select- ▼           |                      |                                   |
| Alias             | <input type="text"/> |                      |                                   |

# Adding new clients to entries – aka BABIES

## Add the child to the Household:

8. If you find an existing client ID, use the green plus sign icon to add client to the household
9. If you must create the profile, follow the same steps as any other new client.
  - a) Search
  - b) Add all known info
  - c) Click Add New Client with this information

| Client Results  |        |           |                        |               |
|---|--------|-----------|------------------------|---------------|
|   | ID     | Name      | Social Security Number | Date of Birth |
|  | 482624 | test, dad |                        | 1990          |
|   |        |           |                        | Showin        |



# Adding new clients to entries – aka BABIES

## Add the child to the Household:

10. Your new household member will appear under Selected Clients
11. Click Continue

| Selected Clients  |        |           |                        |               |
|---|--------|-----------|------------------------|---------------|
|   | ID     | Name      | Social Security Number | Date of Birth |
|  | 482624 | test, dad |                        | 1990          |
|   |        |           |                        | Show          |

Remove client if you made a mistake

# Adding new clients to entries – aka BABIES

## Add the child to the Household:

11. Confirm the three questions for your new household member:

- a) Head of Household
- b) Relationship to HoH
- c) Joined Household Date

★ Make sure **Joined Household Date** is before the head of household's Start Date

12. Save & Exit

| Household Members   |                    |     |                   |                                   |                    |
|---|--------------------|-----|-------------------|-----------------------------------|--------------------|
|   | Name               | Age | Head of Household | Relationship to Head of Household | Joined Household * |
|  | (4) Solo, Han      | 42  | Yes ▾             | Self ▾                            | 01 / 20 / 2019     |
|  | (501224) Solo, Ben | 21  | No ▾              | son ▾                             | 01 / 20 / 2019     |
|  | (482624) test, dad |     | No ▾              | -Select- ▾                        | 10 / 12 / 2020     |
| Add/Delete Household Members  |                    |     |                   |                                   |                    |



# Adding new clients to entries – aka BABIES

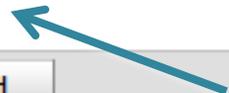
**Add the demographics for the child (if needed):**

1. Click new client's name
2. Go to the Client Profile Tab
3. Click the pencil to edit
4. Save changes
5. Go back to the Head of Household's profile

▼ (125413) Single Parent

| Name               | Age |
|--------------------|-----|
| (4) Solo, Han      | 42  |
| (501224) Solo, Ben | 21  |
| (482624) test, dad |     |

Manage Household



 **Client Demographics**

|                    |
|--------------------|
| Date of Birth      |
| Date of Birth Type |
| Gender             |
| Primary Race       |



# Adding new clients to entries – aka BABIES

**Add the child to the correct entry:**

1. Click the Head of Household's Entry/Exit tab
2. Click the pencil next to the Start Date that should include the child.

| Entry / Exit  |   |      |  |
|---|---|------|--|
|   | Program   | Type | Project Start Date   |
|  | Heading Home - Rowan County - Rapid Re-Housing - ESG (7390) | HUD  |  09/23/2020 |

# Adding new clients to entries – aka BABIES

**Add the child to the correct entry:**

3. Click Include Additional Household Members
4. Check the new client
5. Click Continue
6. Save & Continue *without changing the start date*

Data - (4) Solo, Han

Members

Members were originally associated.

Include Additional Household Members

Data - (4) Solo, Han

Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)

HUD

\* 09 / 23 / 2020 12 : 03 : 19 PM

# Adding new clients to entries – aka BABIES

**Add the child to the correct entry:**

7. Find your new client in the Household table
8. Click the pencil next to their start date

| Household Members Associated with this Entry / Exit                                 |   |                    |                   |   |  |   |            |
|---|---|--------------------|-------------------|---|--|---|------------|
|   |   | Name               | Head of Household |   | Project Start Date   |   | Exit Date  |
|  |  | (4) Solo, Han      | Yes               |   |  09/23/2020 |  | 09/27/2020 |
|  |  | (501224) Solo, Ben | No                |  |  09/23/2020 |  |            |

# Adding new clients to entries – aka BABIES

**Add the child to the correct entry:**

9. Now un-check the other household members so it's just the new client
10. Change the Start Date to your Back Date mode (green check)
11. Save & Continue
12. Complete the assessment as usual!

(125413) Single Parent

(4) Solo, Han (Entry Date: 09/23/2020 12:03 PM)

(501224) Solo, Ben (Entry Date: 09/23/2020 12:03 PM)

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**Edit Project Start Data - (501224) Solo, Ben**

|                             |                                     |   |    |   |      |  |  |  |   |   |
|-----------------------------|-------------------------------------|---|----|---|------|--|--|--|---|---|
| Provider                    | Heading Home - Rowan County - Rapid |   |    |   |      |  |  |  |   |   |
| Type                        | HUD                                 |   |    |   |      |  |  |  |   |   |
| <b>Project Start Date *</b> | 10                                  | / | 12 | / | 2020 |  |  |  | 5 | ▼ |





# What's Next?

# What's Next Calendar

| Due              | Reporting Dates                               |
|------------------|---|
| October          | First quarterly ESG-CV Reports Deadline       |
| November         | Both FY19 and FY20 LSA Deadline               |
| December         | HUD reviews LSA and sends corrections to CoCs |
| January 27, 2021 | PIT Night!                                    |
| March            | FY20 SPMs Deadline                            |

Your next HMIS Users Meeting is November 19<sup>th</sup>.



## Contact NCCEH

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NCEndHomelessness 

@NCHomelessness 

nc\_end\_homelessness 

## Contact NCCEH Data Center Help Desk

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919.410.6997



NCCEH