

# HMIS@NCCEH System Updates

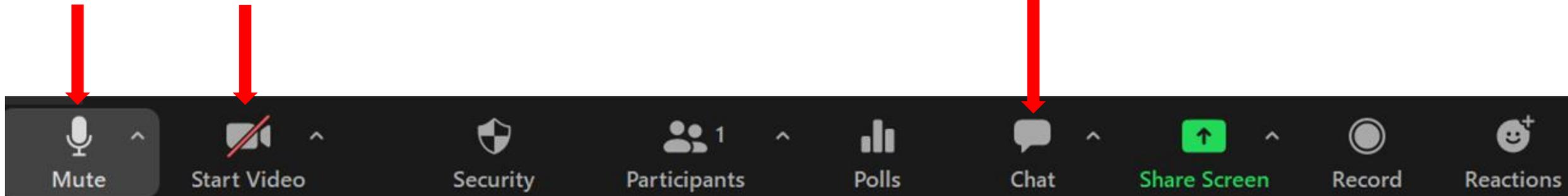
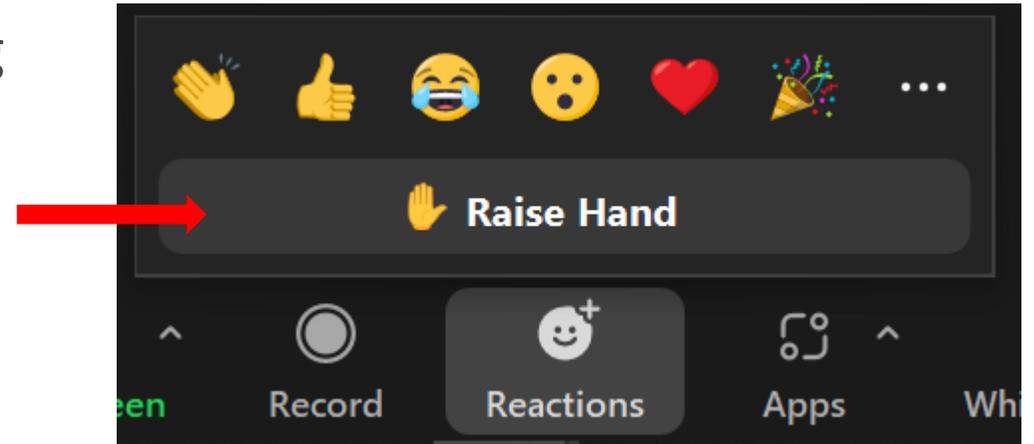
March 2023



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

# Welcome

- Please remain on mute, unless you are speaking
- If you feel comfortable, please turn on your camera
- The chat box is always available
- “Raise Hand” if you’d like to speak



# Agenda

March 2023

## System Updates

- PIT/HIC Debrief!
- ShelterPoint assessment changes
- Data Quality Plan draft to CoCs

## Training and Resources

- Common Errors from PIT/HIC
- Client Merge Process
- SSN Update Process
- ZenGuide Knowledge Base Highlight

## What's Next

- Data Center Forms

## Questions/Concerns?

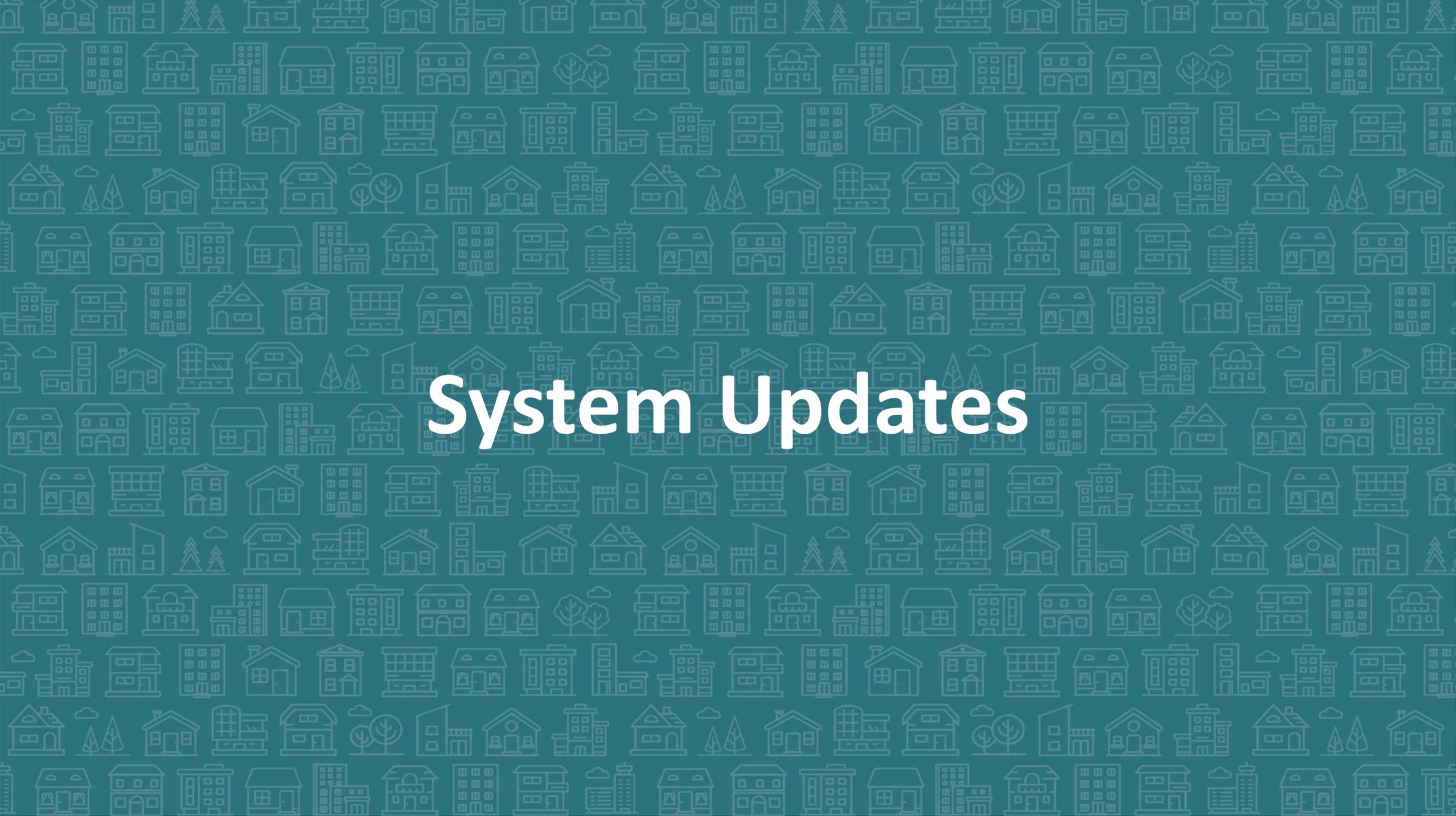


NCCEH

# Why do we wear Shamrocks on St. Patrick's Day?

Because real rocks are too heavy!





# System Updates

# Let's Debrief PIT/HIC

For HMIS ES, TH, RRH, PSH, and OPH projects:



**Pre-PIT Night**  
January



**PIT Night**  
January 25



**Post-PIT Night**  
January 25 - February 1



**Final Review of Reports**  
February



**NCCEH**

# ShelterPoint update

## **Change will prevent EDA issues (for ES projects using ShelterPoint)**

- Currently, when you go to check someone, you see all the Project Start Assessment questions
- On March 1, you'll use the Entry/Exit tab to answer all Project Start questions. Remember, all clients need Project start questions completed!
  1. Check-in your household
  2. Then select the Head of Household to find the Entry/Exit tab!



# ShelterPoint update

Currently, ShelterPoint looks like this

**Household Members**

**i** To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

**(125413) Single Parent**

(4) Solo, Han Assign Unit

(501224) Solo, Ben Assign Unit

---

**Release of Information**

Release of Information None View ROI Details

---

**Entry Data**

**Provider\*** The Haven of Transylvania County - Transylvania County - Haven Thomas House - ES - State ESG (4988) ▼

**Type\*** HUD ▼

---

**Project Start: ES** Date: 02/13/2023 12:09:01 PM

**Answer the questions in this section for ALL clients.**

Date of Birth	<input type="text" value="05"/> / <input type="text" value="04"/> / <input type="text" value="1978"/> <span>G</span>
Date of Birth Type	<input type="text" value="Full DOB Reported (HUD)"/> <span>▼</span> <span>G</span>
Gender	<div><p>Female</p><p>Male</p><p>A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)</p><p>Transgender</p><p>Questioning</p><p>Client refused</p></div> <span>G</span>



# ShelterPoint update

On March 1, use ShelterPoint's Entry/Exit tab

**Unit Stay Entry Data** [Close]

Stay Data | **Entry / Exit** | Release of Information | Service Transactions

**Unit Entry Data - (4) Solo, Han**

Date In *	02 / 13 / 2023    12 : 09 : 01 PM	Midnight Check In
Confirm for Next Day Stay?	No	
Unit Name / Number	SMF+HC / * / 03	Assign Unit
Supplies Given	<input type="text"/>	 Change Clear
Locker number	<input type="text"/>	
Codes/Notes	<input type="text"/>	

▶ **Apply Funds for Service**

# ShelterPoint update

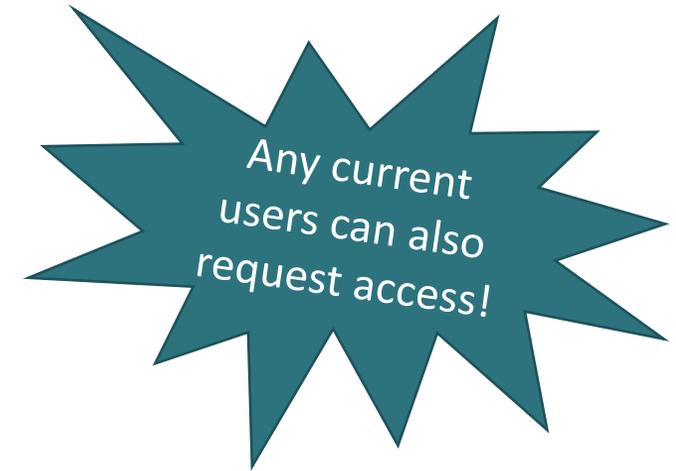
Please contact the Data Center if your ShelterPoint users would like/need to review the LMS ShelterPoint Training before the change occurs.



# New LMS Training Process

## Available courses

- Start Here!
- NC Security & Privacy Training 2022-2023
- NC ClientPoint ES, TH, HP Workflow
- NC ClientPoint RRH & PSH Workflow
- NC Street Outreach Workflow
- *NC ShelterPoint Workflow*
- NC PATH Workflow
- NC VA Workflow



# Data Quality Plan Proposal

## Designed to better support agencies

- Regular review/correction of data throughout the year (not all at once in Fall)
- Allows agencies to review data before CoC committees see it
- Increase data literacy for agency staff

## Designed to align with best practices

- [Mahoning County, OH](#) agencies submit 6+ reports monthly since 2016
- [COHHIO Balance of State in OH](#) agencies run monthly reports
- [Greater Richmond CoC \(VA\)](#) agencies allowed 2% error rates except for SSN
- [Minnesota](#) (all CoCs) agencies submit quarterly with ranked % errors from .99% to 5.99% for more elements

## Designed to increase confidence in data

- Pull a report any quarter and know that your agency/region has review data for quality client experiences!



# Data Quality Plan

## HMIS@NCCEH DQ Plan

- Regular Report (D003) submissions to stay on top of data
- Revise Data Quality Standards for all projects
- Data Quality is a journey, not a destination!

### Table/Report Information

This tab displays only clients with errors in the Date of Birth (DOB) or Relationship to Head of Household (Relate HoH) elements. If a client has a DOB or Relate HoH error, the report can't properly count them in other areas. IMPORTANT: Fixing these errors will have an impact on the errors that appear in later tabs of the report. Re-run the report after fixing the errors on this tab.

### Key

Data Element	Indicator	Reason
HoH	Null	This household has no client marked Head of Household in the Relationship to Head of Household data element.
DOB Type	Null	This client is missing information in the Date of Birth Type data element.
DOB Error	Error	There are inconsistencies between the value recorded for DOB and the value recorded for Date of Birth type for this client.
Relate HoH	Self	This client is marked "Self" in the Relationship to Head of Household data element but is under age 18.
Relate HoH Relate HoH Error	Missing	This client is missing information in the Relationship to Head of Household data element.
Relate HoH Error	HoH Error	This client's household is missing a Head of Household.



# Data Quality Plan

## Process to adopt

- Draft being presented to CoCs this month
  - [HMIS@NCCEH Data Quality Plan Draft - Review of Changes](#)
  - [HMIS@NCCEH Data Quality Plan Draft - Clean Document](#)
  - [HMIS@NCCEH Data Quality Plan Draft - Presentation](#)

## Implementation

- System Updates presentation after review and updates in April
  - Low stakes Beta testing to start!



# Training and Resources

# Common Errors Found During PIT/HIC

- Any minor entering a project at 17 should answer all questions relative to adults
- All HUD Verification sub-assessments questions need to be answered
- Start Date, End Date & Information Date should match for Current Living Situation



# Enter 17 year old Clients as Adults

- Clients age up in projects and can cause errors if all adult questions are not answered
- This includes Client location, Homeless History, Veteran Status, Income, DV history, & Current Living Situation

## ANSWER THESE QUESTIONS FOR HEAD OF HOUSEHOLD AND OTHER ADULTS

CLIENT LOCATION – In which CoC is the Head of Household staying at the time of project entry?			
<input type="checkbox"/> NC 502-Durham City & County	<input type="checkbox"/> NC 503-NC Balance of State	<input type="checkbox"/> NC 513-Chapel Hill/Orange County	<input type="checkbox"/> Other:

HOMELESS HISTORY – Select 1 type of living situation. Follow the arrows & red instructions to complete other sections		
Section 1: TYPE OF PRIOR LIVING SITUATION- Where did the client live immediately prior to this project entry?		
Homeless	Institutional	Temporary & Permanent Housing
Place not meant for habitation (e.g., vehicle, abandoned)	<input type="checkbox"/> Foster care home or foster care group home	<input type="checkbox"/> Residential project or halfway house with no homeless criteria

# Complete Conditional Questions

- The most common error were that the **If Yes** questions for DV & Disability were not answered.
- Refer to the [Updating HUD Verification Sub-Assessments](#) ZenGuide for more information

## Disabilities

Disability Type	<input type="checkbox"/> Mental Health Disorder (HUD)
<b>Disability determination</b> *	<input type="checkbox"/> Yes (HUD) <input type="checkbox"/> No (HUD) <input type="checkbox"/> Not Answered <input type="checkbox"/> Other <input type="checkbox"/> G
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	<input type="checkbox"/> Yes (HUD) <input type="checkbox"/> No (HUD) <input type="checkbox"/> Not Answered <input type="checkbox"/> Other <input type="checkbox"/> G

## Domestic Violence

Domestic violence victim/survivor	<input type="checkbox"/> Yes (HUD) <input type="checkbox"/> No (HUD) <input type="checkbox"/> Not Answered <input type="checkbox"/> Other <input type="checkbox"/> G
If yes for Domestic violence victim/survivor, when experience occurred	<input type="checkbox"/> Yes (HUD) <input type="checkbox"/> No (HUD) <input type="checkbox"/> Not Answered <input type="checkbox"/> Other <input type="checkbox"/> G
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	<input type="checkbox"/> Yes (HUD) <input type="checkbox"/> No (HUD) <input type="checkbox"/> Not Answered <input type="checkbox"/> Other <input type="checkbox"/> G



# Start Date, End Date & Information Date

- All 3 of these dates should be the same as they directly relate to the clients Current Living Situation
- This is a snapshot of where the client is sleeping that night.
- Refer to the [Recording Current Living Situations](#) ZenGuide for more information

Current Living Situation	
Start Date *	04 / 21 / 2022   
End Date	04 / 21 / 2022   
Information Date	04 / 21 / 2022   
Current Living Situation	Select-
If "Other", Specify	<input type="text"/>

*These should all be the same date!*

# How to Merge two Duplicate Profiles

## Email Helpdesk with Duplicate Client IDs

- Let us know if one has correct Name, SSN, Date of Birth, or Demographics
- Let us know which one you would prefer to use

## The Process in HMIS

- Data Center staff can copy one profile's info into another
- Only one ID 'survives' the merge process
- Data Center staff have to weigh:
  - Which ID has been used by other agencies
  - How long each ID has been used
- We will try to use the ID you prefer!



# Avoid Duplicates Altogether!

Search before  
creating  
new profiles

**Client Search**

 Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	-Select- 			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	-Select- 			
U.S. Military Veteran?	-Select- 			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			



# Avoid Duplicates Altogether!

## Made a mistake?

- Correct the error with the edit pencil
- Don't create a new profile

### Client - (4) Solo, Han



(4) Solo, Han

Release of Information: **Ends 02/14/2024**

### Client Information

Summary

**Client Profile**

Households

ROI



### Client Record

Name	Solo, Han
Name Data Quality	Full Name Reported
Alias	Scruffy Nerf Herder
Social Security	***-**-6789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	44



NCCEH

# How to Update Client SSN

- Client SSN should only be sent through a protected excel file as to protect a clients sensitive information.
- We use this process to avoid sending unprotected SSNs through email.
- Refer to the [Updating & Editing Social Security Numbers in HMIS ZenGuide](#) for More information



Date	Headline
06/14/2022	SSN Excel Password

System News (12) | Agency News (1)

Add Agency News | View All



Remember, never send SSN updates through unencrypted email

# ZenGuide Knowledge Base

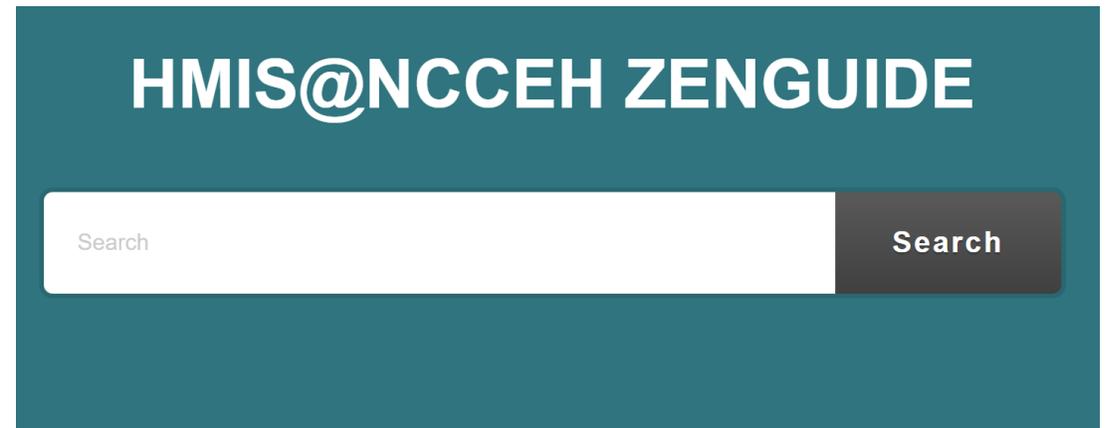
**Your first stop for answers**

72 Articles and counting!

- We use your search results to develop new articles
- New Articles:
  - *Data Entry workflows*
  - *HMIS Release of Information (ROI)*

**Bookmark it!**

<https://ncceh.zendesk.com/hc>





**What's Next?**

# What's Next Calendar

Due	Event Name
March 15th	<u>Monthly HMIS Training: Data Quality Reports</u>
April 11th	<u>Agency Admin System Updates meeting</u>
April 19th	<u>Monthly HMIS training: CLS &amp; DOE</u>
May 9th	Monthly System Updates Meeting
May 17th	TBD (Contact us with your suggestions)



## NCCEH Data Center Forms

### Access

#### HMIS@NCCEH New Agency Form

If your agency wants to join HMIS for the Durham, NC Balance of State, or Orange CoCs, please complete this form with basic information. Use this form if your agency is new to HMIS! Want more information about the process to join HMIS? Check out our [Guide for New Agencies](#).

#### HMIS@NCCEH New Project Form

If your agency is already HMIS Participating and needs a new HMIS Project built, use this form to let the Data Center know.

#### HMIS@NCCEH New License Request Form

If your agency wants to add staff to your HMIS projects, use this form to give us the basic information we need to guide them through training. Agency Administrators and Executive/Program Directors should submit on your agency's behalf.

- *This is a new form for 2023. Please make sure to review all of the questions and provide as much information as possible.*

#### HMIS@NCCEH License Inactivation/Removal Request Form

If your agency no longer needs a license for a user, please use this form to alert Data Center Staff. Only Agency Administrators and Executive/Program Directors should submit this form.

Data Center Forms are  
found online:

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

## 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



# Questions?

Let's Troubleshoot!