

# Early Arrival Tip!

Click the Last Viewed tab from the main menu on the left for a list of client profiles you just reviewed!  
Great help for going back and forth between APR/CAPER results and a client file you're correcting!

The screenshot displays the ClientPoint software interface. At the top, a green header bar reads "ClientPoint > Client Profile". On the left, a vertical menu contains several tabs: "Last Viewed" (selected, indicated by a blue arrow), "Favorites", "Home", "ClientPoint", "ResourcePoint", "FundManager", "ShelterPoint", and "ActivityPoint". Below the "Last Viewed" tab, a list of client profiles is shown, with the first entry being "(4) Solo, Han" and a "Less" link to its right. The main content area on the right is titled "Client - (4) Solo, Han" and shows "Release of Information: None". Below this, a "Client Information" section has tabs for "Summary", "Client Profile", "Households", "ROI", and "Entry / Exit", with "Entry / Exit" being the active tab. A blue information icon with a reminder message "Reminder: Household members must be establish" is visible in the lower right of the main content area.

# BoS HMIS Users Meeting

December 2018

The Data Center at NCCEH



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change

# Agenda

1. Welcome & Introductions
2. Permanent Supportive Housing
  - Project Start
  - Housing Move-In Date
3. Data Center Helpdesk

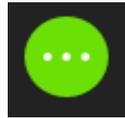
# Make sure you're counted!



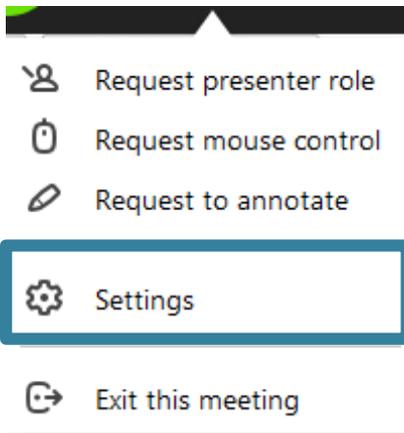
This box is located in the top, center of your screen

# Enter your name so we know who's here

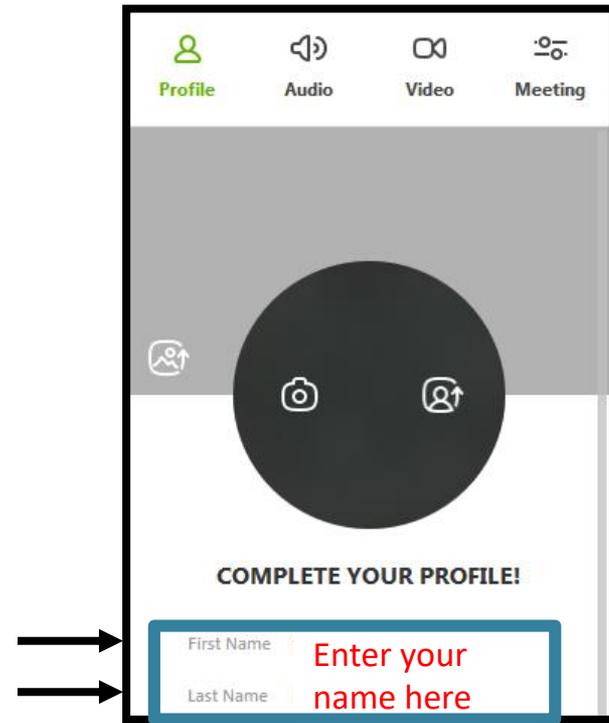
- 1 Click this icon



2



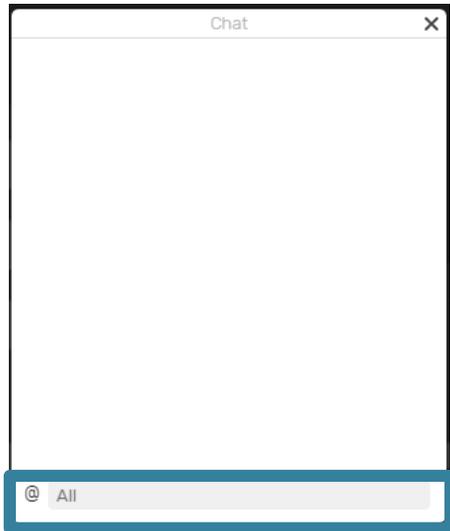
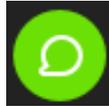
3



# How to chat us a question

- 1 On the computer, use the chat box

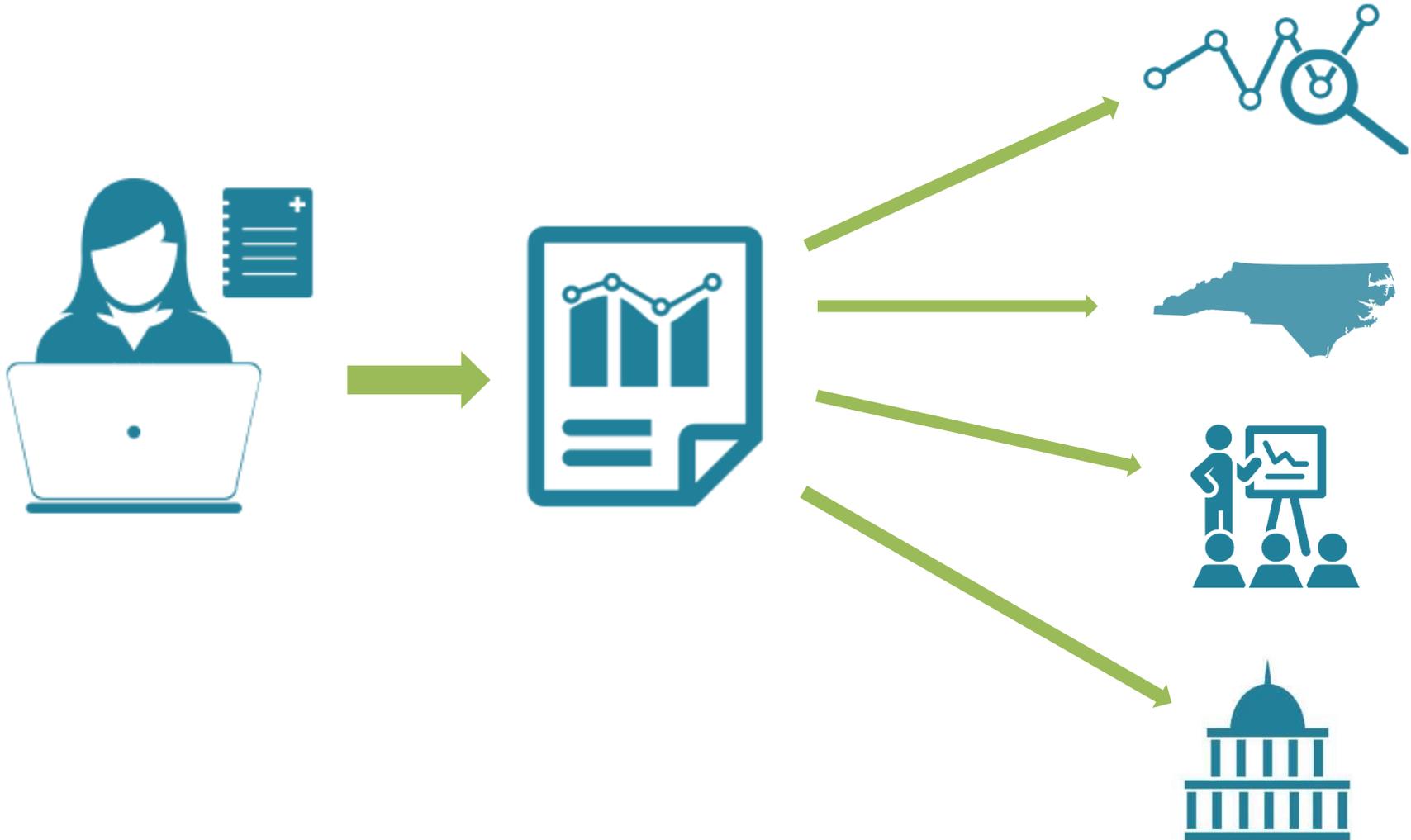
Click this icon



- 2 On the phone, hit \*6 to unmute yourself to ask a question



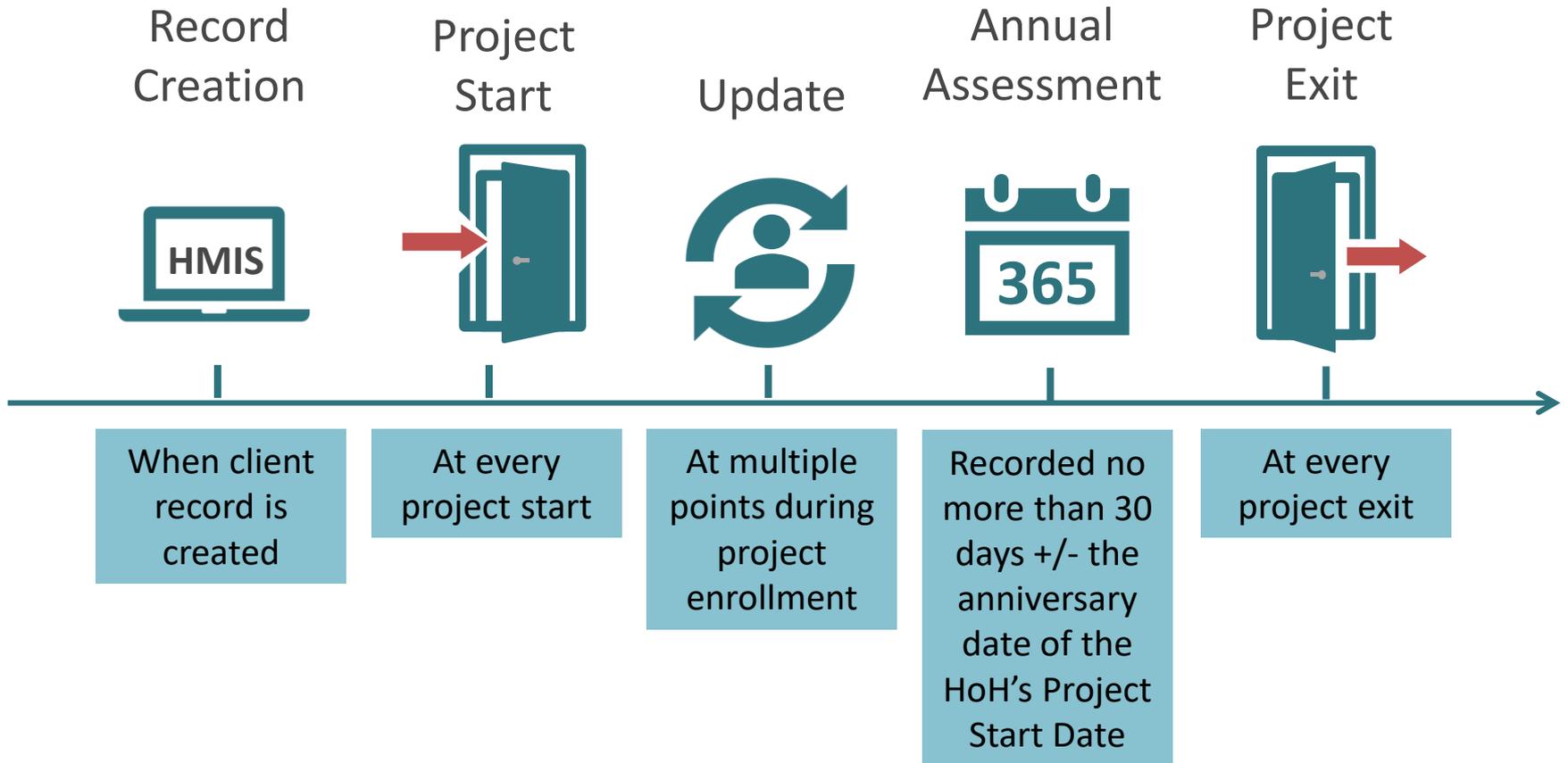
# Why does your HIMS data matter?



with Project Start Date and Project Exit Date

# **DATA COLLECTION STAGES**

# Data Collection Stages



# Data Collection Stage: Record Creation



## What

Creates the client profile and contains data elements collected once or are unlikely to change



## Who

All clients



## Collection Notes

Each client should have one Record Creation point in the region, but may have more than one project start, etc.

# Data Collection Stage: Project Start



## What

When the most data elements are collected through an Entry Assessment (aka Intake) to establish the client's initial status



## Who

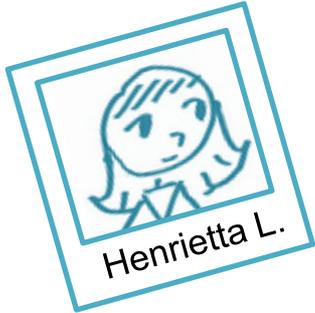
All clients



## Collection Notes

Once collected at Project Start, data changes should not be edited on the Entry but through an Update or Annual Assessment

# Meet Henrietta



Henrietta is our example client to illustrate real-life context for HMIS data collection and data entry

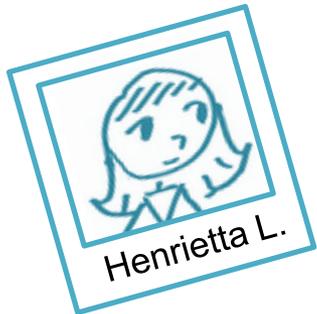
# Project Start Date



## What

Determines the beginning of client participation in a project

A “snapshot” of the client on their first day

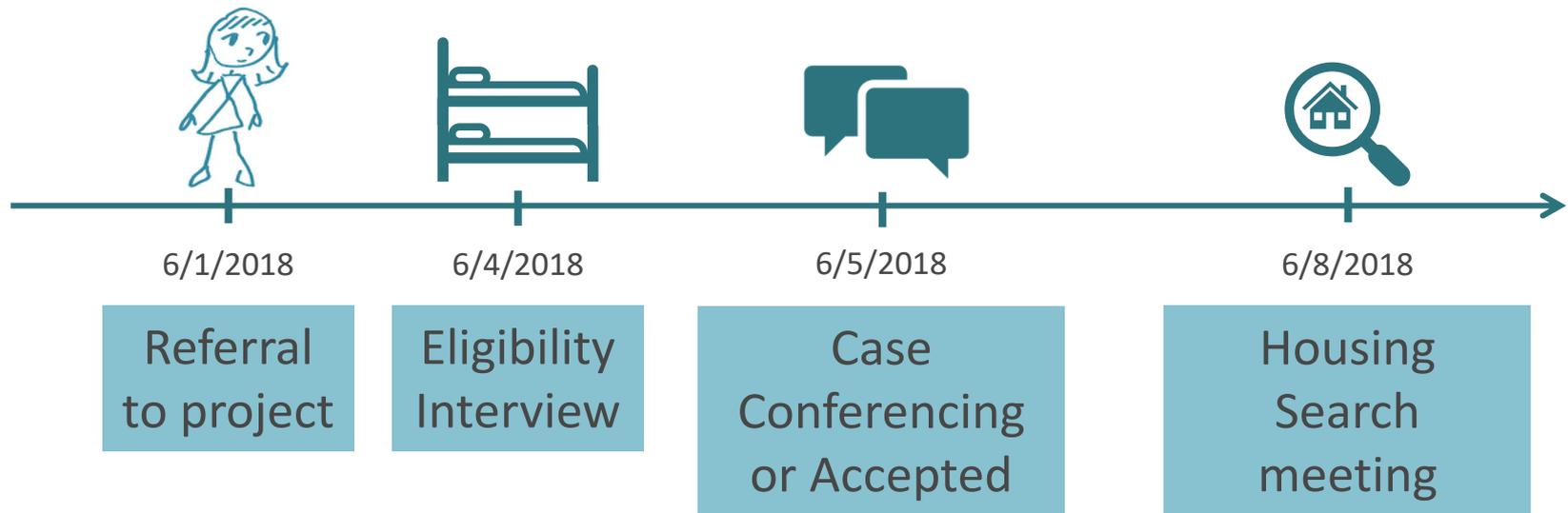


## Collection Notes

Data should reflect the client’s status on day 1 of their entry into a project

Different for each project type

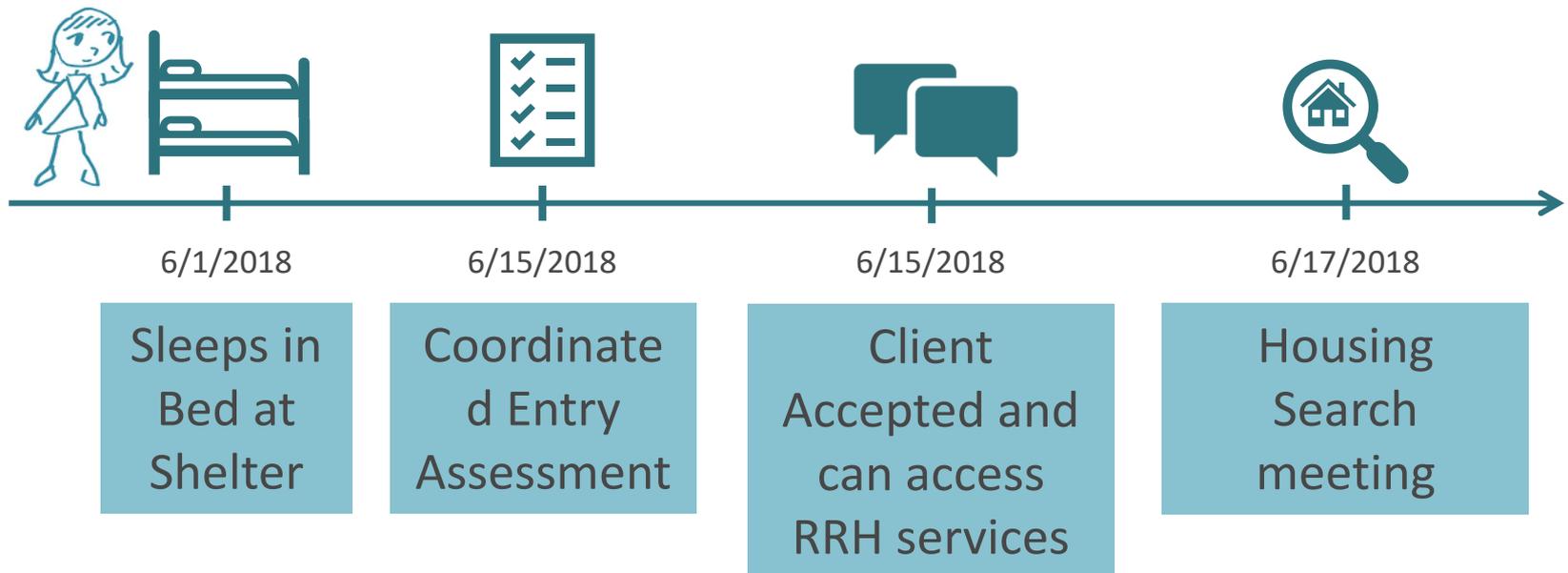
# Project Start Date: Permanent Housing (RRH, PSH)



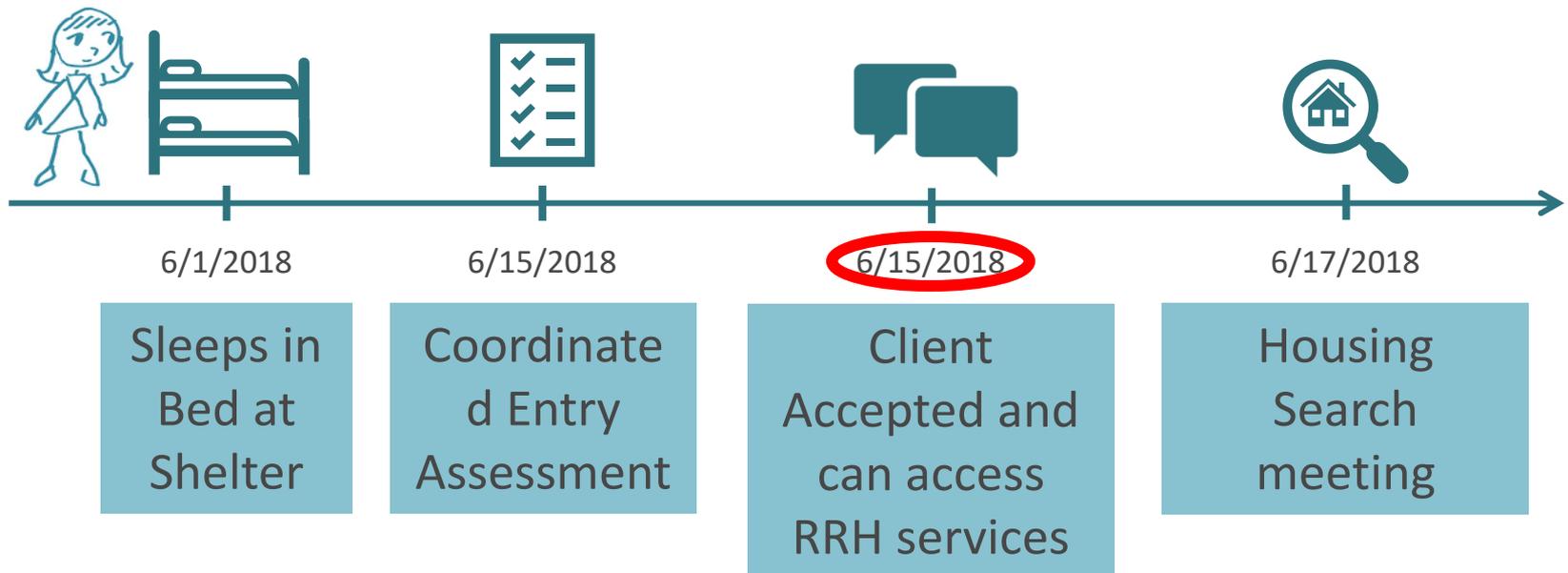
# Project Start Date: Permanent Housing (RRH, PSH)



# Project Start Date: Permanent Housing (RRH, PSH) from Shelter



# Project Start Date: Permanent Housing (RRH, PSH) from Shelter



# Project Start Date



## Collection Notes (cont.)

Project Type	When do I enter Project Start Date?
Street Outreach (SO)	first contact between client and outreach worker
Residential homeless (ES, TH)	first night the client sleeps in a bed
Permanent Housing (RHR, PSH)	the date when a client determined eligible, accepted offer of services, and services are actually accessible
All Other (SSO, PV)	first services delivered to client

# Project Start Date



**Who**

All clients



**Data Collection Stage**

On Entry Assessment

Universal Data Elements, Program Specific Elements



# **WHAT IS REQUIRED TO COLLECT?**

# Options available for every data element

Client Doesn't Know	only if the client does not know a response
Client Refused	only if the client refuses to provide a response
Data Not Collected	only if staff forgot or were unable to ask



# **UPDATE AND ANNUAL ASSESSMENT**

# Data collected during enrollment

## **Updates**

Information that is collected at multiple points during project enrollment in order to track changes over time or entered to record activities as they occur. Is the only place to record move-in date.

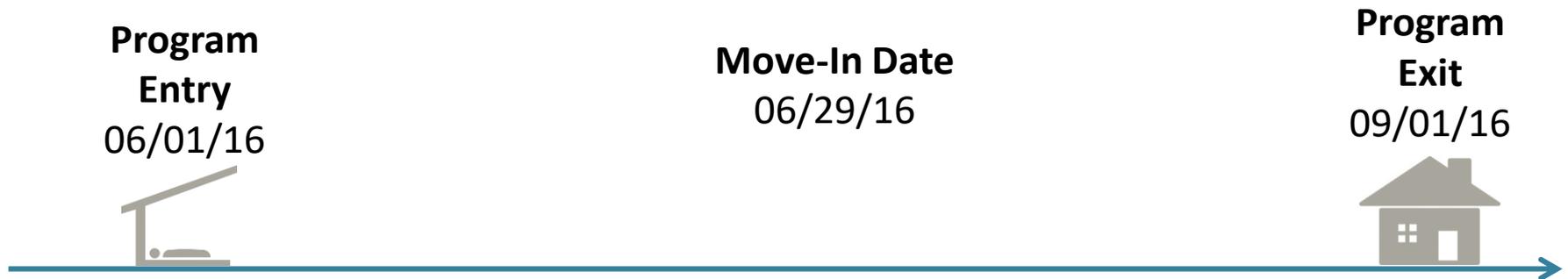
## **Annual Assessment**

Required for clients enrolled in a single project for 365+ days. Must be recorded no more than 30 days before or after the anniversary of the client's Project Entry Date.

Information must be accurate as of the *Information Date*

# Housing Move-In Date:

Add update when client moves into Permanent Housing



Add an Interim Update in HMIS to enter the Move-In Date

Housing Move-In  
Date = 06/29/2016

*The Housing Move-In Date MUST be entered via an INTERIM ASSESSMENT with a timestamp that occurs after the Project Start and before the Project Exit. If client is not in housing leave this question blank.*

*This question differentiates between clients who are awaiting placement and those who have moved into any type of permanent housing, regardless of funding source or whether the project is providing rental assistance.*

**HOUSING MOVE-IN DATE (Head of Household Only)**

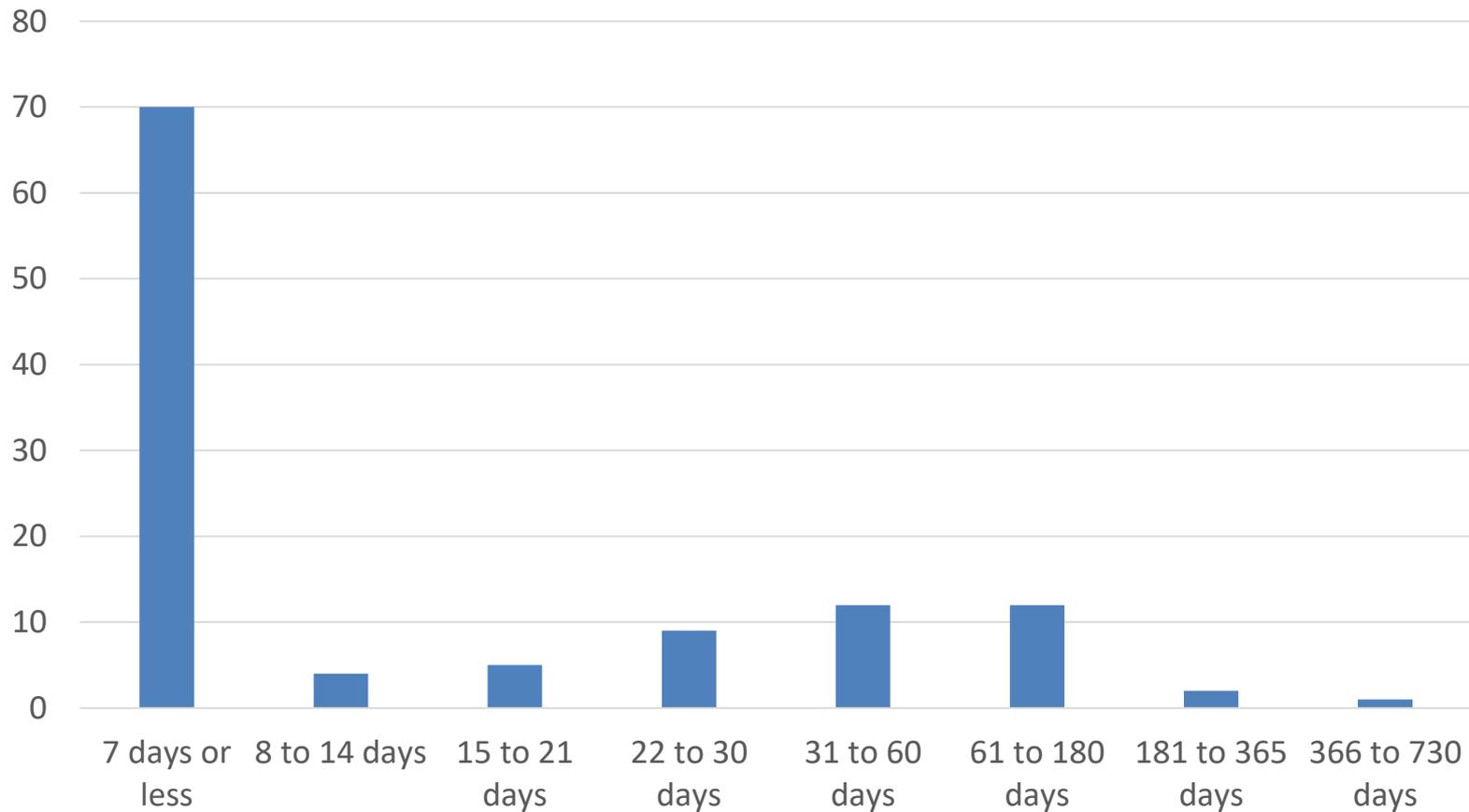
Housing Move-in Date

 /  /     

Note: If client is not housed with \$\$ from your project, do **not** enter a Housing Move-In Date

# What do Move-Ins look like now?

Time Until Housed for new clients after 10/1/2018



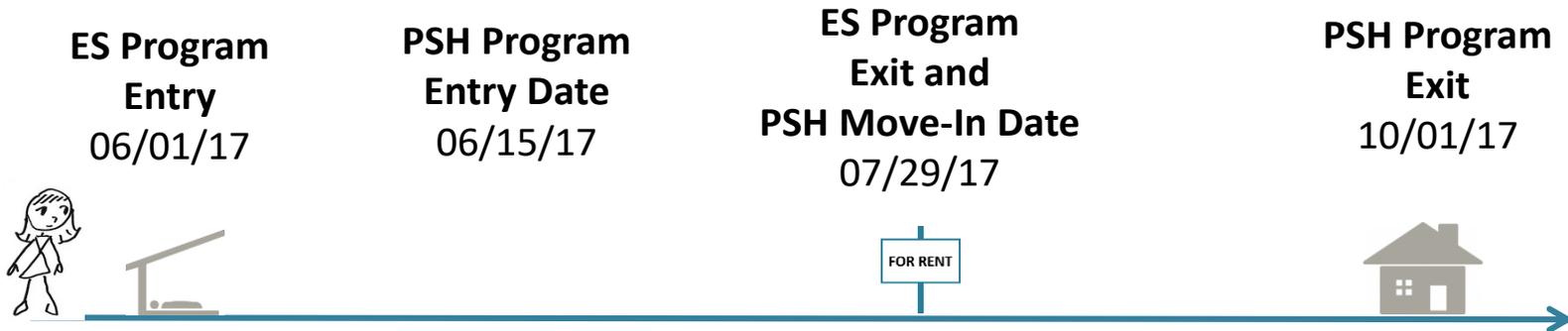
# Who enters a Housing Move-In Date?

## Do Not Enter for:

- Any Homeless Prevention, Emergency Shelter, Transitional Housing, Supportive Services clients

## Enter Housing Move-In Date for:

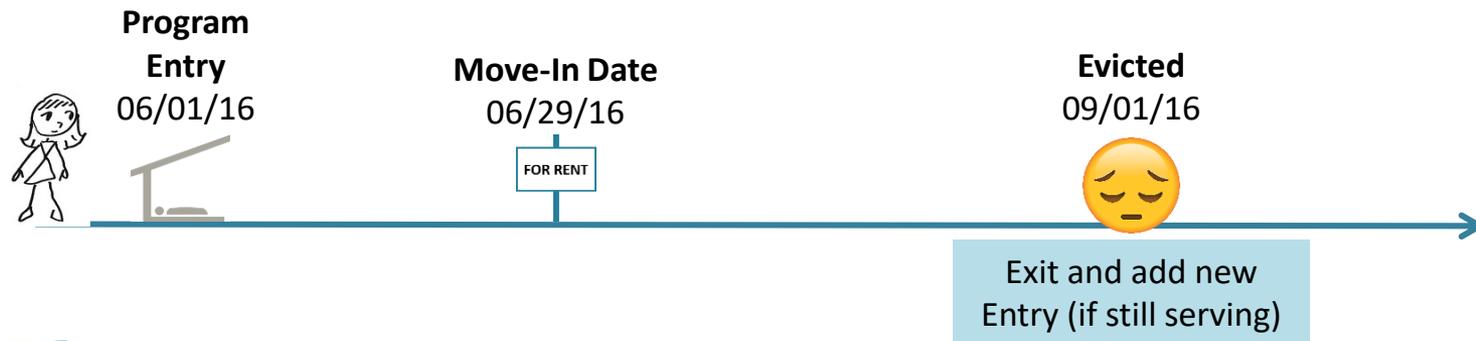
- All Rapid Re-Housing project clients
- PSH projects only if paying financial assistance



# When a client leaves housing

**Don't remove the move-in date** - The original Housing Move-In Date was still a lot of work!

- HUD says: Exit the client and start a new Entry if the Housing search resumes.



How will this impact your workflow?  
Are there other complicated Move-In situations that you've seen?

# When a client leaves housing

## Separate Entries for separate Housing efforts

- Exit clients from the HMIS Project to illustrate they left their housing
- Exit Destination should be set to where they stay the night after leaving
- Add a new HMIS Project Entry to illustrate the housing search process
- If new housing found, enter an Interim Update for the next Housing Move-In Date

Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments		
 Reminder: Household members must be established on Households tab before creating Entry / Exits									
<b>Entry / Exit</b>									
	Program	Type		Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
	Triangle Family Services - Wake County - Rapid Re-Housing - County (7074)	HUD		5/10/2018					
	Triangle Family Services - Wake County - Rapid Re-Housing - County (7074)	HUD		05/01/2018	 05/09/2018				

# Annual Assessment is now based on HoH Start Date

Conducted no more than 30 days before or 30 days after the anniversary of the **Head of Household's Project Start Date**.



Name	R-H	Project Start	Anniversary
Henrietta	HoH	04/17/16	04/17/17
Sarah	Adult	07/01/16	04/17/17
Anna	Child	09/20/16	04/17/17

Annual assessments are based **solely** on the head of household's anniversary date.

The annual assessment must include updating both the head of household's record and any other family member's at the same time

# When to complete an Annual Assessment

Date Type	Date
Client Entry Date	10/17/2016
Client Anniversary Date	10/17/2017
30 days before Anniversary Date	09/17/2017
30 days after Anniversary Date	11/16/2017

When to record the Annual Assessment?  
Within 09/17/2017 – 11/16/2017

# Interims in ClientPoint

Client - (9) Lacks, Henrietta

Mass Visibility Update 

 (9) Lacks, Henrietta

Release of Information: Ends 10/17/2017

-Switch to Another Household Member- ▾

Submit

## Client Information

## Service Transactions

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

 Reminder: Household members must be established on Households tab before creating Entry / Exits

### Entry / Exit

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
 Heading Home Housing - Rowan County - Rapid Re-Housing (7075)	HUD	 10/17/2016				 

Add Entry / Exit

Showing 1-1 of 1

Updates are entered through "Interims"

# Adding an Interim Review

**Interim Reviews** ✕

**Interim Reviews Associated with this Entry / Exit**

Review Date	Review Type	Client Count
<input type="button" value="Add Interim Review"/>		No matches.



# Select the Review Type

## Add Interim Review - (9) Lacks, Henrietta

### Household Members

 To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

(3) Single Parent

(9) Lacks, Henrietta (Entry Date: 10/17/2016 8:31 PM)

(12) Lacks, Harry (Entry Date: 10/17/2016 8:31 PM)

Include appropriate HH member →

### Interim Review Data

Entry / Exit Provider Heading Home Housing - Rowan County - Rapid Re-Housing (7075)

Entry / Exit Type HUD

Interim Review Type \*

- Select-
- Select-
- Update
- Annual Assessment
- Follow-up

   8 : 32 : 20 PM

→  
Select type of review from drop-down

Save & Continue

Cancel

# Enter Review Date + Save & Continue

## Add Interim Review - (9) Lacks, Henrietta

**Household Members**

**To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.**

**(3) Single Parent**

- (9) Lacks, Henrietta (Entry Date: 10/17/2016 8:31 PM)
- (12) Lacks, Harry (Entry Date: 10/17/2016 8:31 PM)

**Interim Review Data**

Entry / Exit Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	10 / 18 / 2016 8 : 46 : 51 PM



Save & Continue

Cancel

# Complete Update data entry

## Entry / Exit Interim Review



### Interim Review Data

Entry / Exit Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	10/18/2016 08:46:51 PM

### Interim Review Assessment

#### Household Members

- (9) Lacks, Henrietta  
Age: 26  
Veteran: No (HUD)
- (12) Lacks, Harry  
Age: Unknown  
Veteran: No (HUD)



Don't forget other Household Members

#### NC HMIS Update

Interim Review Date: 10/18/2016 08:46:51 PM

**\*\* ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN unless specified otherwise\*\***

**Covered by Health Insurance**

#### Health Insurance

**HUD Verification**

Start Date *	Health Insurance Type	Covered?	(HOPWA) If Private Pay Insurance, Specify	(HOPWA) If No, Reason not covered	End Date
<input type="text" value="Add"/>					

# How to find Housing Move-In Date issues

22c - Length of Time between Project Start Date and Housing Move-in Date					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
7 days or less	16	0	16	0	0
8 to 14 days	0	0	0	0	0
15 to 21 days	3	0	3	0	0
22 to 30 days	0	0	0	0	0
31 to 60 days	9	0	9	0	0
61 to 180 days	7	0	7	0	0
181 to 365 days	0	0	0	0	0
366 to 730 Days (1-2 Yrs)	0	0	0	0	0
<b>Total (persons moved into housing)</b>	<b>35</b>	<b>0</b>	<b>35</b>	<b>0</b>	<b>0</b>
<b>Average length of time to housing</b>	<b>32</b>	<b>0</b>	<b>32</b>	<b>0</b>	<b>0</b>
<b>Persons who were exited without move-in</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total</b>	<b>35</b>	<b>0</b>	<b>35</b>	<b>0</b>	<b>0</b>

- The CoC APR and ESG CAPER identify missing or outlier Housing Move-In Dates (including incorrect ROIs) in several questions.

# How to find – need more help?

Use the NCCEH Data Center's Guides

- [How to Read and Run the CoC-APR](http://www.ncceh.org/files/9344/)

(<http://www.ncceh.org/files/9344/>)

- [How to Read and Run the ESG-CAPER](http://www.ncceh.org/files/9345/)

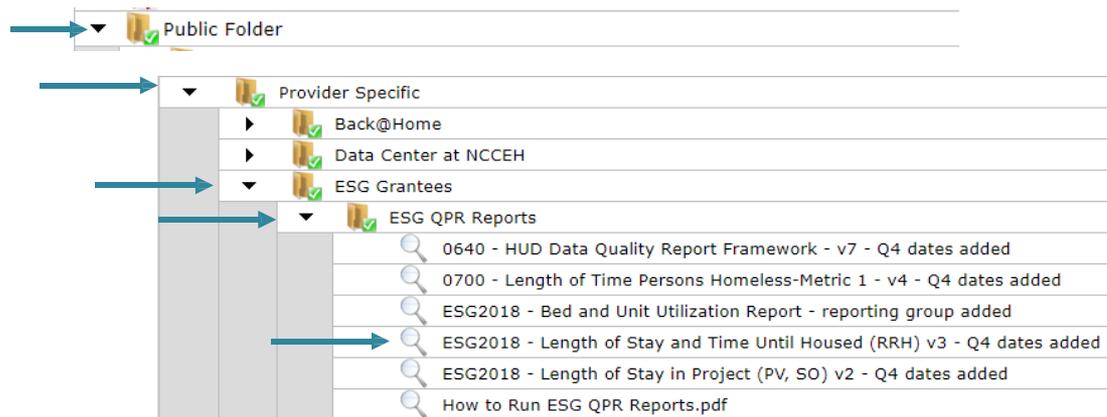
(<http://www.ncceh.org/files/9345/>)

Call the Helpdesk at 919-410-6997

Email the Helpdesk at [hmis@ncceh.org](mailto:hmis@ncceh.org)

# How to find – need more help?

- Housing Move-In Date is a really important element. Use the **Length of Stay and Time Until Housed** Report in ART to zero-in on this element.
- Find this report in the ESG Folder of ART



\*Can be used for PSH too!

# How to find – need more help?

- Annual Assessments are not the highlight of the LSA, but is a common issue in Orange County. Use the



## Tabs to help Case Managers



**PROJECT EXIT**

# Data Collection Stage: Project Exit



## What

When the last data elements are collected through an Exit Assessment (aka Exit Interview) to establish the client's final status



## Who

All clients



## Collection Notes

This final stage demonstrates the impact projects have had on clients since their Project Start

# Project Exit Date



## What

Determines the end of client participation in a project

A “snapshot” of the client on their last day

Contains the essential outcome element Destination and the last check on the client’s context



## Collection Notes

Data should reflect the client’s status on the last day of their entry into a project

Different for each project type

# Project Exit Date



## Collection Notes (cont.)

Project Type	When do I create an exit?
Street Outreach (SO)	Client enters another project or finds housing, finds another outreach project, is deceased, or outreach worker cannot find and client has no contacts for 90 days
Residential homeless (ES, TH)	When a client leaves the bed and does not return that night
Permanent Housing (RHR, PSH)	When services end and client is no longer official participant on caseload
All Other (SSO, PV)	When the last services delivered to client

# Project Exit Date



**Who**

All clients



**Data Collection Stage**

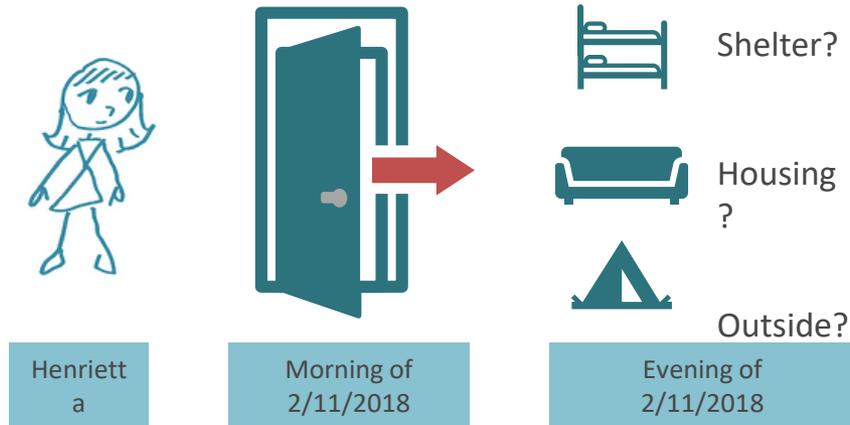
On Exit Assessment

# Exit Destination

## What

Identify where a client will stay immediately exiting a project

If Henrietta exits, where will she sleep that night?

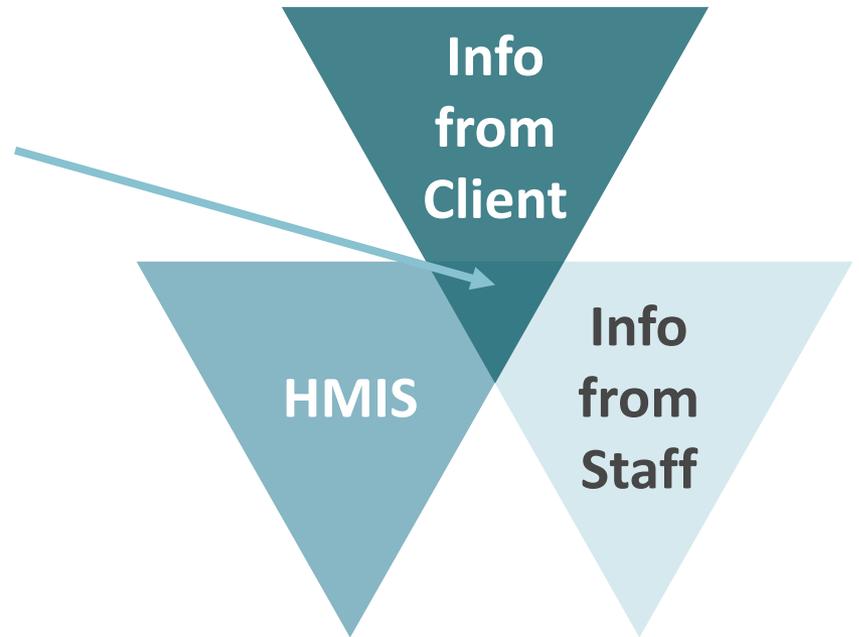


# Exit Destination

## Collection Notes

Use multiple sources for a better understanding and more accurate data

If no information (after triangulating) is available, use No Exit Interview Completed



# Exit Destination



## Who

All clients



## Data Collection Stage

At project exit



## Special Reminder

Other will be considered incomplete

Keep a copy of our Exit Destination Guide available to consult

Missing data is always better than inaccurate data!

Even the kiddos!

# **DATA ELEMENTS FOR ALL CLIENTS**

# Disabling Condition



## What

1. A physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:
  - Is expected to be long-continuing or of indefinite duration;
  - Substantially impedes the individual's ability to live independently; and
  - Could be improved by the provision of more suitable housing conditions.
2. A developmental disability
3. HIV or AIDS

# Disabling Condition



## Collection Notes

Documentation is not necessary; may be required by funding source

Some Income sources indicate a disabling condition:

- Supplemental Security Income (SSI)
- Social Security Disability Insurance (SSDI)
- VA Service-Connected Disability Compensation
- VA Non-Service-Connected Disability Pension



Fair Housing Compliance: residential projects must separate the program admission process from collecting disabling condition

# Disabling Condition



## Who

All clients

## Data Collection Stage



Only on Entry Assessment for the Y/N question

On Entry, Update, Annual and Exit Assessments for specific types

## Special Reminder



Two parts: General gateway question (Y/N) + Specific condition

The date for specific types should be the information date or the date the data was collected.

# Living Situation



## What

To identify chronic homeless status, the prior living situation and length of stay in that situation, and time homeless not captured by HMIS



## Who

Heads of Households and Adults

# Living Situation



**Data Collection Point**  
On Entry Assessment



**Special Reminder**

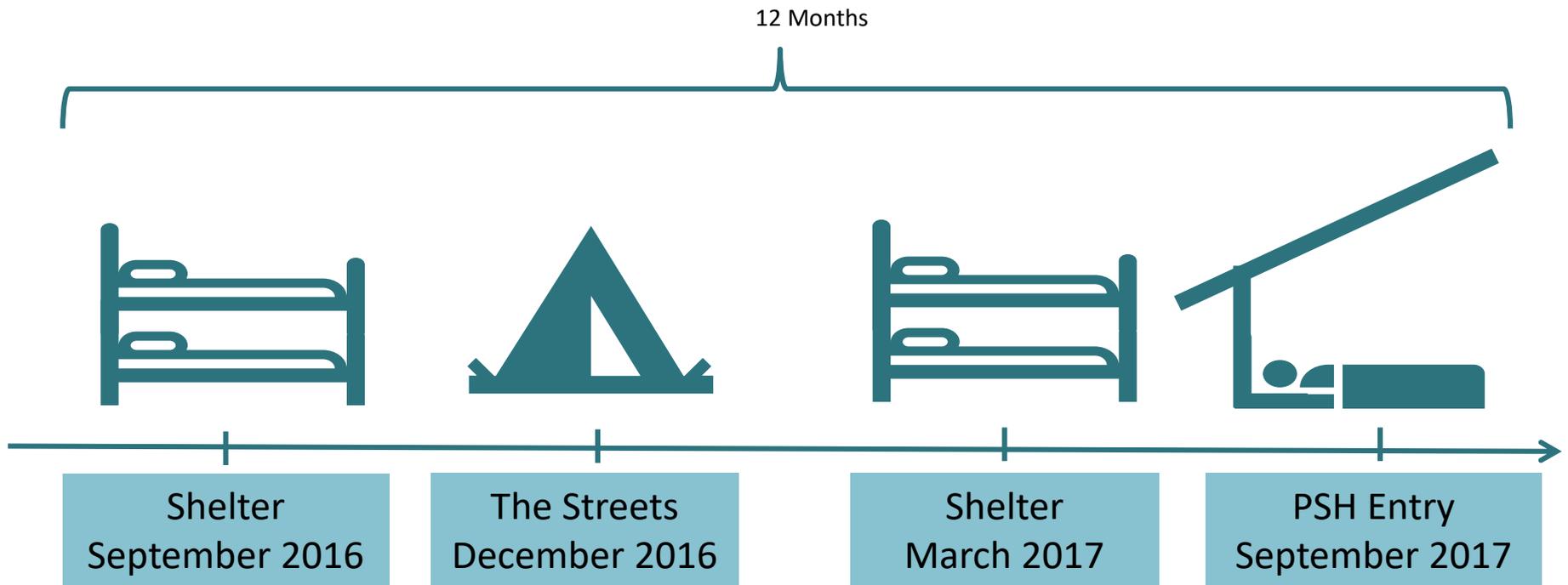
A series of five questions

If a child turns 18, they become an adult  
and need to answer

# Defining Chronic Homelessness



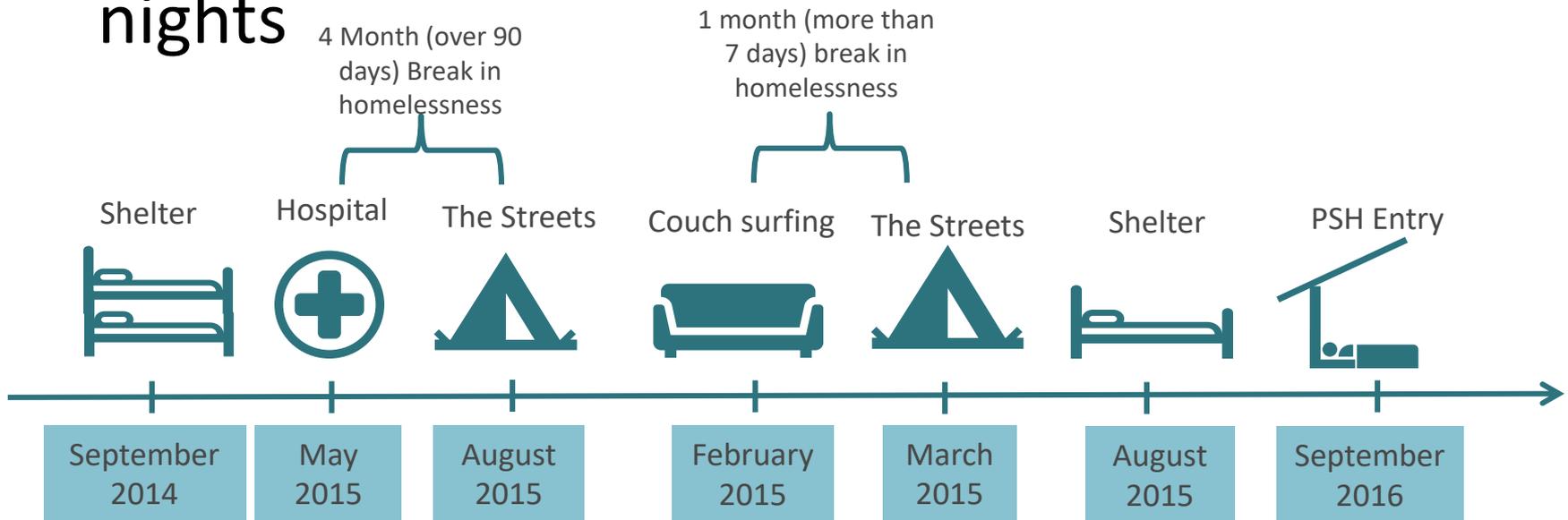
# What does a client with chronic homeless history look like?



\* Plus a qualifying disability

# What does a break in a client's homeless history look like?

1. Institutional stays of 90 days or more
2. Stays in "housed" environments more than 7 nights



# What about Transitional Housing and Rapid Re-Housing?

## Transitional Housing

Clients entering TH projects will lose their chronic homeless status.

Exception: VA funded TH (like Grant Per Diem projects) will maintain chronic homeless status if:

- The client was chronically homeless before they entered the project
- AND the time in VA TH doesn't determine their chronically homeless status

## Rapid Re-Housing

RRH is considered Permanent Housing, but clients are allowed to transfer to PSH.

# Homeless History: 1<sup>st</sup> Question

Prior Living Situation (the night before)



## Literally homeless Situation

Place not meant for habitation  
Emergency Shelter  
Interim Housing (PSH only)



## Institutional Situation

Hospital  
Foster care  
Jail/Prison



## Transitional & Permanent Housing Situation

Permanent supportive housing  
Transitional housing  
Rental by client

## Missing/Don't Know/Refused responses

# Homeless History: 1<sup>st</sup> Question

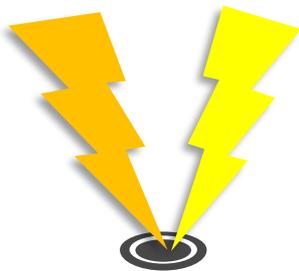
Prior Living Situation (the night before)

**Interim Housing is not a type of housing**

Is a housing situation, not a waitlist

Is *only* used if the client is identified as **chronically homeless** and has:

**applied** for permanent housing, been **accepted**, a unit/voucher **reserved** for them, but for some reason they **cannot move-in** immediately



About as likely as you  
being struck by  
lightening twice

# Homeless History: 2<sup>nd</sup> Question

Length of Stay in Previous Place

## **What**

Select the amount of time the client stayed in the location the night before entering your project

# Homeless History: 3<sup>rd</sup> Question

Approximate date homelessness started

Record the date (an estimate) that this experience of homelessness began for the client

- Based off HUD Literally Homeless definition and “breaks” in homelessness

# Homeless History: 4<sup>th</sup> and 5<sup>th</sup> Questions

Number of times and months in ES or on streets in last three years

## **What**

Including the current experience of homelessness, what is the client's recent homeless history?

According to chronic homeless definition, referring only to emergency shelter and unsheltered experiences

# Living Situation

## Example

Henrietta enters emergency shelter on June 5th

Question	Addie's Response
Residence Prior to project entry?	Streets
Length of stay in prior living situation?	1 year or longer
Approximate date started?	7/14/2017
Total # times homeless in past 3 years?	three times
Total # months homeless in past 3 years?	More than 12 months



# QUESTION & ANSWER

# Data security depends on all of us



Do not leave your computer logged in & unattended



Do not share passwords



Alert us when staff with access to HMIS leave your agency

**ncceh.org/hmis**

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

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

helpdesk for local support



**North Carolina Coalition to End Homelessness**

securing resources

encouraging public dialogue

advocating for public policy change