





#### System Updates

- ART updates coming soon
- Federal Reporting Season

#### How Can We Help?

- Avoiding duplicate clients
- Keep a household together
- Disability in HMIS
- Responding to client privacy concerns

#### What's Next

• HMIS Calendar

Demo/Troubleshooting



### **HMIS Monthly Checklist**

- □ Have you run a report on last month's data?
- □ Have you made your corrections for last month's data?
- □ Has your team reviewed the data together?
- □ Have you made a program decision based on data?
- Do you have enough paper ROIs for the next month?
- □ Have you checked for Annual Assessments coming due?



**System Updates** 

## **ART Upgrade**

#### SAP BusinessObjects 4.3 offers enhanced reporting and dashboarding, with a familiar interface that allows you to keep the ART reports you use now

WellSky is pleased to report that after an extensive proof-of-concept review, we will upgrade WellSky Community Services' Advanced Reporting Tool (ART) to SAP BusinessObjects 4.3.

#### Bring powerful new analytics to your agency

BusinessObjects 4.3 offers a host of new data visualization features. You can create new report types in the same simple query format you already know.

#### Simplify user adoption with a familiar solution

Your users are already familiar with SAP BusinessObjects, so onboarding will require limited training. While there are some changes in the move from versions 3.1 to 4.3, most changes, starting with the streamlined Launchpad, create a much more friendly user experience.

#### Keep your current reports, folders, and data visibility and security rules

WellSky will migrate existing public reports into BusinessObjects 4.3 so you will not have to recreate them. All folder structures remain intact, keeping your reports organized as you have intended. BusinessObjects 4.3 will also continue to enforce Community Services' data visibility and security rules.

All familiar methods for reporting are still available, from easy-to-use tabs with tables, to simple count charts, to more advanced graphs and visualizations.

#### Use almost any modern browser

BusinessObjects doesn't require browser plug-ins. It supports all modern browsers, like Chrome, Safari, FireFox, and Edge.

#### No additional cost to you!

WellSky is pleased to be able to offer this upgraded version of BusinessObjects without increasing end user license fees.

#### Do more with your data

BusinessObjects 4.3 supports downloading reports in CSV, HTML, PDF, and XLSX. You can also schedule reports for automatic file exports.



# HUD Reporting Season

LSA – Longitudinal System Analysis AHAR – Annual Homelessness Assessment Report SPM – System Performance Measures HIC – Housing Inventory Count PIT – Point in Time Count

#### YOU DID IT!





How Can We Help?

**Avoid Duplicates** 

### Search for clients first!

Why do we search for clients?



Avoid duplicates





Keep HMIS accurate



### How to search for your clients?

Search broadly three separate ways

1 Partial Name: Such as "Mi Mouse" or "Mickey Mo"

2 Alias: Such as "Batman" for our client Bruce Wayne

3 Social Security Number (SSN): Try the last-four numbers





#### How to search: Partial First Name

#### Let's try to find Henrietta Lacks

Client Search		
	i Please Search the System b	before adding a New Client.
Name	First Middle	Last Suffix
Name Data Quality	-Select-	
Alias		
Social Security Number		We searched "He Lacks"
Social Security Number Data Quality	-Select-	
U.S. Military Veteran?	-Select-	
Exact Match		
Search Clear	Add New Client With This Information	

#### How to search: Partial First Name

#### (Scroll down for results)

Searc	h Clear	Add New Client With This Informa	ation								
Client Number											
Enter or so Client ID	Enter or scan a Client ID number to go directly to that Client's profile.          Client ID #       Submit										
Clie	nt Results										
ID	Name 🔺	Socia Numi	al Security ber	Date of Birth	Alias	Gender	Banned	Household Count			
				No matches.							

No matches. Now clear the previous search and try again!



#### How to search: Partial First Name



No matches. Now clear the previous search and try again!



### What if you find duplicates?

Here, we searched for John Smith. The only difference between the profiles is the "Jr" suffix. This is a duplicate profile.

	Client Results										
		ID	Name 🔺	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count		
_	<b>*</b>	15	Smith, John	***-**-4444	01/01/1972		Male		0 🔍		
	<b>*</b>	14	Smith, John, Jr	***-**-4444	01/01/1972		Male		0 🔍		
	Showing 1-2 of 2										

Use the more complete profile (14) and report both client IDs (14 and 15) to the Data Center.

Then the profiles will be merged and all data saved.



Household help!

### Household Tab

- Think of the tab as a roster of who *could* be in enrolled
  - But being on the Household Tab is just the first requirement to add members as clients (with a Project Entry)





### Household Tab

#### • Think of the tab as a roster of who *could* be in enrolled

Summary Client Pro	file Households	ROI Entry / Exit	Case	e Managers	Case Plans	Measurements	Activities	Assessment
	arent							
Name			Age	Head of Household	Relationship Head of Household	to Joined Household	Previous Association	Household s Count
(219) Lion, Scar			39	Yes	Self	08/17/2019	0 🔍	1 🔍
(221) Lion, Azizi			15	No	daughter	08/17/2019	0 🔍	1 🔍
(220) Lion, Kamari			3	No	son	08/17/2019	0 🔍	1 🔍
(222) Lion, Shenzi			10	No	daughter	08/17/2019	0 🔍	1 🔍
Manage Household								



## Entry/Exit Tabs

• If Scar was the only one coming to the project, only select his name

Projec	rt Start Data - (219) Lion, Scar	×
ŀ	Household Members	
0	To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.	
. (	64) Single Parent	
4	2 (219) Lion, Scar	
6	(221) Lion, Azizi	
	(220) Lion, Kamari	
6	(222) Lion, Shenzi	



### Entry/ Exit Tabs: Single client from Household

• A 'Please Confirm' warning appears, notice the wording





# Entry/ Exit Tabs: Single client from Household cont.

• Notice the Client Count on the Entry/Exit Screen, which means Scar is the only client in the project

	Entry / Exit								
	Program	Туре	Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
1	Heading Home - Rowan County - Emergency Shelter (7389)	HUD	02/17/2020			Ē.	E	ø	Å.
	Add Entry / Exit		Showing 1-1 of	1					



# Entry/ Exit Tabs: Multiple clients from Household

• Lets add two more household members to the Project Start

P	Project Start Data - (219) Lion, Scar	×
	Household Members	
	To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.	
	(64) Single Parent	
	✓ <u>(219) Lion, Scar</u>	
	✓ (221) Lion, Azizi	
	<u>         (220) Lion, Kamari</u>	
	(222) Lion, Shenzi	



# Entry/ Exit Tabs: Multiple clients from Household cont.

• Notice the client count is now three for this entry

	Entry / Exit							
	Program	Туре	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
1	Heading Home - Rowan County - Emergency Shelter (7389)	HUD	02/17/2020		E.	E.	ø	k



# Entry/ Exit Tabs: Multiple clients from Household cont.

- If we were to go and edit the Entry, we see the ability to 'Include Additional Household Members'
- This means they were not removed from the Household because they weren't on the Entry/Exit



### Household Tab revisted

• Household Tab is exactly the same after Entry/ Exits were made

Summary	<b>Client Profile</b>	Households	ROI	Entry / Exit	Case	e Managers	Case Plans	Measurements	Activities	Assessments
<b>▼ (</b> 64	<ol> <li>Single Paren</li> </ol>	t								
Name					Age	Head of Household	Relationship Head of Household	to Joined Household	Previous Association	Household s Count
(219) Lion,	Scar				39	Yes	Self	08/17/2019	0 🔍	1 🔍
(221) Lion,	Azizi				15	No	daughter	08/17/2019	0 🔍	1 🔍
(220) Lion,	Kamari				3	No	son	08/17/2019	0 🔍	1 🔍
(222) Lion,	Shenzi				10	No	daughter	08/17/2019	0 🔍	1 🔍
Manage	Household									



### Household tab is different than Entry/Exit tab

- Household tab sets up the roster for recording Intakes and Exits
- Don't delete! Only remove members from the Household tab in the case of death or divorce
- Reports pull information from Entry/Exit tab



**Disability Data** 



#### What

A condition must meet one of three parts of the definition:

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/AIDS





#### **Collection Notes**

Documentation is not necessary but 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



#### **Collection Notes**



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





**Data Collection Stage** 

→ On Project Start, Interim Update, Interim Annual, and Project Exit Assessments



#### **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.



#### On the paper assessment

DISABILITY STATUS - Does the client have a disabling condition?										
□ Yes	No		Client c	loesn't know	□ Client refused	Data not collected				
Answer 'Yes' or 'No' for each disability type (in white). If the client selects 'Yes' for any disability type, you must also complete the shaded sections below.										
Disability Type Yes No Disability Determination						be of long-continued finite duration and ally impairs client's live independently?	I Start Date (MM/DD/YYYY)			
Physical			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	С			
Chronic Health Con			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	с			
HIV/AIDS			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	С			
Developmental			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	С			
Alcohol Abuse			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	С			
Drug Abuse			□Yes □No □DK □R	ef 🗆 DNC	🗆 Yes 🗆 No	DK Ref DN	С			
Both Alcohol and Drug Abuse			□Yes □No □DK □R	ef 🗆 DNC	□ Yes □ No	DK Ref DN	с			
Mental Health Prob.			□Yes □No □DK □R	ef DNC	🗆 Yes 🗆 No	DK Ref DN	С			

TNCCEH

## **HMIS Disability Data Entry**

Based on scenario from previous section

### Indicate client has a disability in HMIS





### Select type of disability in HMIS

Q Disabilities			HUD Verification	
Disability Type *	Disability determination *	Start Date *	End Date	
Add				
Disabilitie	s			
Disability Type	e* -Select-	V	G	
	-Select-			
	Physical (HUD)			
	Chronic Health Co	ondition (HUD)		
	HIV/AIDS (HUD)			
	Developmental (H	UD)		
	Alcohol Abuse (HU	(DL		
	Drug Abuse (HUD)	)		1
	Both Alcohol and	Drug Abuse (HUD)		J
2	Mental Health Pro	blem (HUD)	NCCEH	1

### Enter disability determination in HMIS



The answer here should match response to the gateway question

### Confirm the disability meets HUD's definition

#### Disabilities

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently



If the client has this disability type, set the If Yes question to "**Yes.**"



#### Enter Start Date = Date information collected





#### Save the disability data in HMIS





## **HUD Verification**

HI ID verificati	on matters										
	Un matters:	Alert	HUD Verification Status								
		4	Incomplete								
			Complete								
isability Status											
Does the client have a disabling condition? Yes (HU	D) ~ G										
Q Disabilities			HUD Verification 🔬								
Disability Type *	Disability determination *	Start Date *	End Date								
🧪 🗋 Mental Health Problem (HUD)	Yes (HUD)	03/08/2021									
Add	;	Showing 1-1 of 1									



### Complete HUD Verification (determination=yes)

We were able to determine that our client had a disabling mental health problem.

	Disability determination									
Disability Type	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete				
Physical (HUD)	0	۲	0	$\odot$	0	0				
Chronic Health Condition (HUD)	0	۲	0	0	0	0				
HIV/AIDS (HUD)	0	۲	0	$\odot$	0	0				
Developmental (HUD)	0	۲	0	0	0	0				
Alcohol Abuse (HUD)	•	۲	0	0	0	0				
Drug Abuse (HUD)	0	۲	0	0	0	0				
Both Alcohol and Drug Abuse (HUD)	•	۲	•	0	•	0				
Mental Health Problem (HUD)	۲	0	0	0	0	0				



## Disability data quality

Three of the most common errors

#### Potential disability data entry errors - Missing

Selecting "Yes" to indicate a client has a disability but no disabilities are entered.



### Potential disability data entry errors- Conflict

Selecting "No" to indicate that a client does not have a disability but adding a disability type in the sub-assessment.

D di	oes isat	the client have a bling condition?	No (	HUD) 🔻 G		-
(	Q	Disabilities				HUD Verification 🛕
		Disability Type *		Disability determination *	Start Date	End Date
	0	Alcohol Abuse (HUD)		Yes (HUD)	07/06/2017	
Add Showing 1-1 of 1						



# Potential disability data entry errors - not a HUD disability

If Disability Determination or "If Yes" question are missing or No, then the data says the client should not be counted as having a disability.

- Remember, this is HUD's required database, so we use their definitions.
- HUD's disability definition has multiple parts.





#### Locate these errors using the A019 ART report (previously known as the 0640 Data Quality Framework)

Q3. Universal Data Elements					
Data Element	Error Count	% of Error Rate			
Veteran Status (3.7)	0	0.00%			
Project Entry Date (3.10)	1	0.23%			
Relationship to Head of Household (3.15)	7	1.62%			
Client Location (3.16)	2	0.65%			
Disabling Condition (3.8)	8	1.86% <			
Destination (3.12)	88	36.67%			

Missing and inconsistent data will be aggregated here. Another tab will detail who these clients are.



### Locate these errors using the D007 – 0630a Report in ART

ES and TH projects can also use the D007 – 0630a PIT report to see inconsistent disability responses.

	Α	В	С	D	E	F	G	Н	
	Client Id	Client Unique Id	Age	Dis	Disability	Long	Disab Start	Disab End	Pro
1	313	313		ab		Ouraci			g
2		jstm10251981j250s326	39	Y	Both Alcohol and Drug Abuse (HUD)		1/25/2021		ES
3	12499	jstm10251981j250s326	39	Y	Mental Health Problem (HUD)		7/27/2009		ES
4		jstm10251981j250s326	39	Y	Physical (HUD)		12/1/2020		ES
5	69055	jrcm02281962j500r260	58	Ν	Both Alcohol and Drug Abuse (HUD)		2/13/2020		TH
6	00000	jrcm02281962j500r260	58	Ν	Mental Health Problem (HUD)		2/13/2020		TH
7	70000	scsf07071968s250c211	52	Y	Mental Health Problem (HUD)	Y	12/21/2020		ES
8	10000	scsf07071968s250c211	52	Y	Physical (HUD)	Y	12/21/2020		ES
9	80222	cflf09071970c640f460	50	Y	Mental Health Problem (HUD)	Y	12/24/2020		ES
10		jbam09051954j520b424	66	Y	Alcohol Abuse (HUD)	Y	10/17/2017		TH



**HMIS Privacy for Clients** 

### What are privacy docs for clients?

Always know where these documents are:

- HMIS Privacy Sign
- HMIS@NCCEH Privacy Notice\*
- HMIS@NCCEH Release of Information
- Privacy Options 1 pager

\*link to template version



Allowable Uses under implied consent summarized

We only use your personal information in ways that may benefit the client directly or indirectly as follows:

- To provide or coordinate services on behalf of an individual or household;
- For payment or reimbursement for services;
- To carry out administrative functions, including but not limited to oversight and management functions; or
- For creating reports as defined in the Privacy Notice



#### Informed consent requested for three sections





#### **Clients must initial next to each section**

• For 1 year





#### **Client Consent**

To complete, client signs, dates, and lists any dependents this applies to

•	Client signature:	, Date:	,		
	Signature of guardian or authorized-re	presentative (when required):			
	Relationship to client:	Date signed by guardian/autho	rized representative://		
	This release of information also applies to the following dependents:				
	Last Name	First Name	Date of Birth		
•					
			I]		



#### **HMIS@NCCEH** Policies and Procedures

#### If HMIS poses a safety risk

A client is a victim of abuse, neglect or domestic violence, or if a client reports that they are a victim of abuse, neglect or domestic violence, a more detailed discussion about HMIS with the client is recommended.

#### Options to secure the record:

- $\hfill\square$  Lock visibility to the standard information
- □ The right to refuse sharing if the agency has HMIS data visibility with other agencies
- The right to be entered as an unnamed record, masking identifying information as a randomly generated number.
- The right to have client profile inactivated in HMIS. Security of hard copy files: Agencies may create a paper record by printing the assessment screens located within HMIS.



## Privacy Options 1 Pager

Contact us at Helpdesk to use these options <u>hmis@ncceh.org</u>



#### **Our Privacy Framework for HMIS**

Share this with staff & clients on the options to secure data in HMIS

#### Sharing Choices Available

We only collect information to help you get housed and to improve programs and the lives of people experiencing homelessness. Clients can refuse any individual question - we are required to at least ask.

- Sharing Options: In HMIS, there are options to share your information with other community partners.
  - ROI Section 1: Share or not share your basic info (like Name) with other agencies that use HMIS@NCCEH
  - ROI Section 2: Share or not share more detailed info with local agencies also providing housing services in HMIS
  - ROI Section 3: Allow or not allow coordination outside of HMIS (like at confidential community meetings)
- Electronic Client File Options: Still concerned for your privacy? There are a few options for how we create your client file.
  - Hide your basic info (like Name) from other staff at this agency and all others. This is an "Unnamed record".
  - De-identified your profile. Use code-name or pseudonym in HMIS to limit identifying information.
  - No HMIS entry (might delay services). Requires tracking outside of HMIS.

For HMIS Users Only:

Need to set up one of these options? Collect the client's info on paper forms and contact the Data Center Helpdesk at hmis@ncceh.org to set it up.



What's Next?

### What's Next Calendar

Due	Report/Event Name
Jan 26 <sup>th</sup>	Point in Time Night
March 24 <sup>th</sup>	HMIS Users Meeting
April 28 <sup>th</sup>	Next HMIS Users Meeting
Early April	State and City ESG CV data due (NCCEH pulls CAPER)



#### Contact NCCEH

hello@ncceh.org 919.755.4393



@NCHomelessness

nc\_end\_homelessness 🝺

#### Contact NCCEH Data Center Help Desk

hmis@ncceh.org 919.410.6997



**Questions?** Let's Troubleshoot!