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.servicept.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
System Updates
COVID-19 Response - Reporting

How can we help?
Case Manager tab & Dashlet report
Case Plans tab & ART report
2nd Quarter Recommended Report

What’s Next?

We are recording today’s meeting
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”
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 Phone: 919-850-1123

Key Information:

• www.irs.gov/nonfilereip
• More information is being added to IRS.gov/coronavirus.
• You can find additional marketing materials and answers to frequently asked questions at IRS.gov/eipppartners.
• 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 ncceh.org/hmis/training
How can we help?
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:
  o My Client Counts Reports
  o Follow-up Lists
  o Case Plans/Goals
Track who is a client’s Case Manager

- Enter Data As (EDA) mode matters!
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
Add a Case Manager

Decision Points:
• Does the case manager work with the whole household?
• Is the case manager an HMIS User?
Add a Case Manager

Decision Points:
• Does the case manager work with the whole household?
• Is the case manager an HMIS User?

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?
Add a Case Manager

Usually, you are selecting yourself!

Name & Contact Info automatically appears
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

• Find the User Profile Setting icon
How do you manage contact info in HMIS

• Update E-mail and Phone info
• Save & Exit
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

- Type:
  - ServicePoint User
  - Me
  - Other

- Name: Helen Housing Test
- Title
- Phone Number
- Email Address: hmis@ncceh.org
- Provider: Heading Home - Rowan County - Rapid Re-Housing - ESG (7390)
- Start Date: 06/10/2020
- End Date

Already there because of EDA mode!
Case Manager Saved!

• Now anyone in my agency or visibility group can see our work together!
Let’s see this in action

HMIS@NCCEH training site for ServicePoint*
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*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.
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
Set-Up Counts Reports

- Look for Add Counts Report
- Options may vary
Set-Up Counts Reports

Click the Pencil!

<table>
<thead>
<tr>
<th>Date</th>
<th>Headline</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/08/2020</td>
<td>ServicePoint Version Update Happening at 11 PM Tonight</td>
</tr>
<tr>
<td>04/10/2020</td>
<td>Updated COVID-19 questions + guidance</td>
</tr>
<tr>
<td>03/18/2020</td>
<td>New data for COVID-19 Response</td>
</tr>
<tr>
<td>03/09/2020</td>
<td>Warning: Do Not Use Verify &amp; Save</td>
</tr>
<tr>
<td>03/04/2020</td>
<td>ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend</td>
</tr>
<tr>
<td>02/17/2020</td>
<td>ART failed this morning (Updated 2.17)</td>
</tr>
</tbody>
</table>
Set-Up Counts Reports
Set-Up Counts Reports

• Standard list to choose from

- 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”
Set-Up Counts Reports

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

**Edit Dashlet**

- **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.

**Filters**

- **Select Dates**: Today
- **Start Date**: 06/10/2020
- **End Date**: 06/10/2020
- **Provider Type**: System Wide
Set-Up Counts Reports

- 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.

**Provider Type**
- System Wide
- Provider
- Reporting Group

**Start Date**
06 / 10 / 2020

**End Date**
06 / 10 / 2020
Set-Up Counts Reports

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

![Dashboard with report settings](Dashboard_image.png)
Set-Up Counts Reports

• Once a box is modified, the report will immediately pull.
Set-Up Counts Reports

• Once a box is modified, the report will immediately pull.

Click on the blue numbers to see the whole list.

Sometimes, when changing EDA mode or just logging in, you’ll want to refresh the data.
Home Page Counts Dashlet Reports

• Generate quick lists of clients on your homepage
• Keep an eye on data quality
• Good options to consider:
  o See when new Referrals are recorded
  o See when a follow-up is scheduled for this day/week/month
  o 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
How to add Case Goals

• From there, click Add Goal

• Add the Case Manager
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

<table>
<thead>
<tr>
<th>Date Goal was Set</th>
<th>06 / 09 / 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classification*</td>
<td>Education</td>
</tr>
<tr>
<td>Type*</td>
<td>Complete vocational training</td>
</tr>
<tr>
<td>Goal Description</td>
<td></td>
</tr>
<tr>
<td>Target Date</td>
<td>09 / 09 / 2020</td>
</tr>
<tr>
<td>Overall Status*</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

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
Filling in the Case Goal

• Fill in the sections about the goal’s timeline
  • Chose what the outcome is when Overall Status is Closed

<table>
<thead>
<tr>
<th>Target Date</th>
<th>Overall Status</th>
<th>If Closed, Outcome</th>
<th>If Partially Complete, Percent Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2020</td>
<td>In Progress</td>
<td>Partially achieved</td>
<td>Partially achieved</td>
</tr>
</tbody>
</table>

09/09/2020
Filling in the Case Goal

- Fill in the sections about the goal’s timeline
  - If outcome was ‘Partially achieved’, add a ‘Percent Complete’

<table>
<thead>
<tr>
<th>Target Date</th>
<th>09/09/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Status</strong>*</td>
<td>Closed</td>
</tr>
<tr>
<td>If Closed, Outcome</td>
<td>Partially achieved</td>
</tr>
<tr>
<td>If Partially Complete, Percent Complete</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>07/20/2020</td>
</tr>
</tbody>
</table>
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
How to add additional Notes and Goals

After Add Goal is clicked three options are presented:

- Case Notes
- Action Steps
- Service Transaction
How to add Case Notes

Click Add a Case Note
- Note Date Auto-populates
- Add your Note
- Save Case Notes
How to add Case Notes

After Case Note is saved:

• Shows Date, Note, and Case Manager’s Name

<table>
<thead>
<tr>
<th>Case Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
</tr>
<tr>
<td>Heading Home - Rowan County - Rapid Re-Housing - CoC</td>
</tr>
</tbody>
</table>

Add Case 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
Add Service Transaction

- Add Service
- Click ‘OK’
Add Service Transaction

• Brought over to Service Transaction tab
• Create the Service
Add Service Transaction

- Once completed, it will list under Service Transactions
- Navigate back to the Case Plans tab

### All Service Transactions

<table>
<thead>
<tr>
<th>Select Dates</th>
<th>Start Date</th>
<th>End Date</th>
<th>Transaction Type</th>
<th>Date</th>
<th>Provider</th>
<th>Type</th>
<th>Need Status / Outcome</th>
<th>Need Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Select-</td>
<td></td>
<td></td>
<td>Need</td>
<td>06/12/2020</td>
<td>Heading Home - Rowan County - Rapid Re-Housing - CoC</td>
<td>Case/Care Management</td>
<td>Identified / Fully Met</td>
<td>Education / Complete vocational training</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Service</td>
<td>06/12/2020</td>
<td>Heading Home - Rowan County - Rapid Re-Housing - CoC</td>
<td>Case/Care Management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Save and Exit from the Goal

- Once completed, it will list under Service Transactions
Finished Case Goal

• A created goal will have the Classification, Type, Dates, and number of Notes
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
ART Report: 0404 – Client Case Plans

• Tab B – Casenotes Only:
  • Case Note Creator
  • Date of Note
  • Note itself

<table>
<thead>
<tr>
<th>Casenote Provider:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casenote User</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Total Goal Record Count</th>
<th>Total Client Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal Classification</th>
<th>Goal Type</th>
<th>Goal Status</th>
<th>Goal Outcome</th>
<th>Goal Record Count</th>
<th>Client Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>Get GED</td>
<td>Identified</td>
<td>Not Applicable</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
ART Report: 0404 – Client Case Plans

• Tab D – Statistics:
  • For whole agency
  • Breaks down five different types

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Record Count</th>
<th>Client Count</th>
<th>Percentage of Clients with Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>1</td>
<td>1</td>
<td>100.00%</td>
</tr>
<tr>
<td>Case Notes</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Actionsteps</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Case Managers</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Infractions</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
2nd 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

Default EDA isn’t the project I want

Used accurate EDA mode
Left-side Menu: Reports

Find fast reports here
Run the Report

Or use the ESG-CAPER!

Matches EDA mode!

What’s your funding? (If not VA or PATH, choose HUD0
## What’s Next Calendar

<table>
<thead>
<tr>
<th>Due</th>
<th>Report/Event Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 10\textsuperscript{th}</td>
<td>NC State of Emergency for COVID-19</td>
</tr>
<tr>
<td>Mar 18\textsuperscript{th}</td>
<td>COVID-19 Response questions in HMIS</td>
</tr>
<tr>
<td>July 16\textsuperscript{th}</td>
<td>Next NC BoS CoC HMIS Users Meeting</td>
</tr>
<tr>
<td>Aug/Sept</td>
<td>Longitudinal System Analysis Report</td>
</tr>
<tr>
<td>Oct 1\textsuperscript{st}</td>
<td>New CE Elements required in HMIS</td>
</tr>
<tr>
<td></td>
<td>First quarterly ESG-CV reports anticipated deadline</td>
</tr>
</tbody>
</table>
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

Contact NCCEH Data Center Help Desk
hmis@ncceh.org
919.410.6997