

BoS SSO Grantee Webinar

September 2018



North Carolina Coalition to End Homelessness

securing resources

encouraging public dialogue

advocating for public policy change

Agenda

- SSO Grantee Reporting
- Coordinated Assessment Project workflow
- Prevention and Diversion workflow



SSO GRANTEE REPORTING

What are the SSO reporting needs?

SSO grantees are required to report back to the CoC using 3 main reports:

1. By-Name List report (ART)
2. Services Transactions (Dashboard)
3. Annual Performance Report (Dashboard)



BY-NAME LIST (BNL) REPORT

BNL Report – How to Use Tab

How should I use the information on the By-Name List?

The By-Name List results can be used to accomplish the following tasks:

1. Identify who is currently experiencing homelessness during the specified time frame by filtering out people with a Housing Move-in date.
2. Identify who has long lengths of time homeless by sorting the Length of Stay (Cumulative) column from longest to shortest cumulative stay.
3. Identify special populations experiencing homelessness or being housed by looking at Veteran Status, Chronically Homeless status, and/or Household Type.
4. Identify the counties where people are receiving services by looking at NC County of Service.
5. Identify who may need additional supports/resources by looking at Client Status and filtering for "missing documents," "need case conferencing," or "waiting for housing opening."
6. Identify who has been referred to a housing provider and when they were referred.

BNL Report – How to Use Tab

How is someone removed from the By-Name List?

There are 3 ways someone is removed from the list:

1. Disappearance - the person should have "Cannot be located" under the Reason removed from By-Name List column.
2. Death - the person should have "Deceased" under the Reason removed from By-Name List column.
3. Housed - the person should hve "Housed for 90 days or more" under the Reason removed from By-Name List column.

BNL Report – Key

Client Status

Select one of the following:

Missing documents

Needs case conferencing

Waiting for housing opening

In housing search

Housed

Cannot locate currently

Removed from active list

BNL Report – Key

Housing Assessment Disposition	Select one of the following:
	Referred to emergency shelter/safe haven
	Referred to transitional housing
	Referred to rapid re-housing
	Referred to permanent supportive housing
	Referred to homelessness prevention
	Referred to street outreach
	Referred to other continuum project type
	Referred to a homelessness diversion program
	Unable to refer/accept within continuum; ineligible for continuum projects
	Unable to refer/accept within continuum; continuum services unavailable
	Referred to other community project (non-continuum)
	Applicant declined referral/acceptance
	Applicant terminated assessment prior to completion
Other/specify	

BNL Report – Key

Reason removed from By-Name List

Select one of the following:

Cannot be located

Deceased

Housed for 90 days or more

BNL Report- Personally Identifiable Info

Personally Identifiable Information

HMIS ID	First Name	Last Name	Date of Birth	Age	Gender	Veteran? Y or N	Is Client Chronically Homeless? Y or N	Household Type
4	Han	Solo	5/04/1978	40	Male	No (HUD)	No	Unaccompanied Adult 25+ Individual
4	Han	Solo	5/04/1978	40	Male	No (HUD)	No	Unaccompanied Adult 25+ Individual
479038	test	test	2/02/1982	36	Male	Yes (HUD)	No	Family: Adult 25+ Family Member
479038	test	test	2/02/1982	36	Male	Yes (HUD)	No	Family: Adult 25+ Family Member
479038	test	test	2/02/1982	36	Male	Yes (HUD)	No	Family: Adult 25+ Family Member
479038	test	test	2/02/1982	36	Male	Yes (HUD)	No	Family: Adult 25+ Family Member
481427	test	again	1/01/1981	37	Female	No (HUD)	Yes	Unaccompanied Adult 25+ Individual
481427	test	again	1/01/1981	37	Female	No (HUD)	Yes	Unaccompanied Adult 25+ Individual
481427	test	again	1/01/1981	37	Female	No (HUD)	Yes	Unaccompanied Adult 25+ Individual
482624	dad	test	1/01/1990	28	Male	No (HUD)		Family: Adult 25+ Family Member
482624	dad	test	1/01/1990	28	Male	No (HUD)		Family: Adult 25+ Family Member
488104	Test	Test	1/01/1975	43	Male		Yes	Unaccompanied Adult 25+ Individual
488104	Test	Test	1/01/1975	43	Male		Yes	Unaccompanied Adult 25+ Individual
490397	CCP	test	1/01/1980	38	Female	No (HUD)		Family: Adult 25+ Family Member
490397	CCP	test	1/01/1980	38	Female	No (HUD)		Family: Adult 25+ Family Member
490400	CCPA	test	1/01/1950	68	Female	Yes (HUD)		Family: Adult 25+ Family Member
490400	CCPA	test	1/01/1950	68	Female	Yes (HUD)		Family: Adult 25+ Family Member

BNL Report- Homeless Provider Info

Homeless Provider Information

NC County of Service	Current Provider	Project Entry Date	Project Exit Date (If Applicable)	Length of Stag	Length of Stag (Cumulative)
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	6
Rowan	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/10/2018		3	6
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	10
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/11/2018		2	10
Rowan	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/10/2018		3	10
Rowan	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/11/2018		2	10
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	6
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018	9/10/2018	0	6
Rowan	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/10/2018		3	6
	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/11/2018		2	4
	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/11/2018		2	4
Rowan	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	6
Rowan	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/10/2018		3	6
Wake	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	5
Wake	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/11/2018		2	5
Wake	Heading Home - Rowan County - Emergency Shelter - State ESG(7389)	9/10/2018		3	5
Wake	NC Balance of State - Region 5 Coordinated Assessment Project(7595)	9/11/2018		2	5

BNL Report- Assessment Status

Assessment Status				
VI-SPDAT Complete? Y or N	VI-SPDAT Date	VI-SPDAT Score	Family VI-SPDAT	Youth VI-SPDAT
Yes	9/10/2018	11		
Yes	9/10/2018	11		
Yes	9/10/2018	12		
Yes	9/10/2018	12		
Yes	9/10/2018	12		
Yes	9/10/2018	12		
Not Yet				
Not Yet				
Not Yet				
Yes		12		
Yes		12		
Yes	9/10/2018	10		
Yes	9/10/2018	10		
Yes			17	

BNL Report- Case Conferencing

Case Conferencing						
Case Conferencing Date	Client Status	Housing Assessment Disposition	Date referred to a housing provider	Housing Move-in Date	Date removed from Bg-Name List	Reason removed from Bg-Name List
	Missing documents	Referred to street outreach				
	Missing documents	Referred to street outreach				
	Needs case conferencing					
	Needs case conferencing					
	Needs case conferencing					
	Needs case conferencing					
	Missing documents					
	Missing documents					
	Missing documents					
				9/11/2018		
				9/11/2018		
	Needs case conferencing	Referred to emergency shelter/safe haven				
	Needs case conferencing	Referred to emergency shelter/safe haven				
				9/10/2018		
				9/10/2018		



SERVICE TRANSACTIONS REPORT

Service Transactions Report

Report Options

Provider *	NC Balance of State - Region 7 Coordinated Assessment Project (7465) ▼	
Provider Search Type *	The selected provider ONLY ▼	
Services *	<input checked="" type="checkbox"/> Needs Entered by my provider <input checked="" type="checkbox"/> Services Provided by my provider (Non-shelter stays) <input type="checkbox"/> Shelter Stays provided by my provider <input checked="" type="checkbox"/> Needs Referred to my provider <input checked="" type="checkbox"/> Referrals Made by my provider	
Service Code	<input type="text" value="Choose Service Code"/>	<input type="button" value="Clear"/>
Need Date Range	09 / 01 / 2018   	09 / 21 / 2018   
Service Provided Date Range	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>   	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>   
Need Outcome	-All- ▼	
<input type="button" value="Build Report"/>		<input type="button" value="Download Results"/>

Service Transaction

Need Date	Name	Need Type	Created By	Referred To	Service	Service Provider
09/15/2018	(13) One, Test	Housing Related Coordinated Entry	Heading Home - Rowan County - Emergency Shelter - State ESG	NC Balance of State - Region 7 Coordinated Assessment Project		
09/21/2018	(13) One, Test	Homeless Permanent Supportive Housing	NC Balance of State - Region 7 Coordinated Assessment Project	Heading Home - Rowan County - Permanent Supportive Housing - HUD		

Showing 1-2 of 2



ANNUAL PERFORMANCE REPORT

APR Report

Report Options

Provider Type

[Provider](#) [Reporting Group](#)

Provider *

NC Balance of State - Piedmont (Region 5) Coordinated Assessment Project (7595) ▾

[This provider AND its subordinates](#) [This provider ONLY](#)

Program Date Range *

09 / 01 / 2018    to 09 / 24 / 2018   

Entry/Exit Types *

[Basic](#) [Basic Center Program](#) [HUD](#) [PATH](#) [Quick](#) [RHY](#) [Standard](#) [Transition](#)
[Entry/Exit](#)

Build Report

Download

Clear

APR Report

5a - Report Validations Table

Report Validations Table	
1. Total Number of Persons Served	7
2. Number of Adults (age 18 or over)	7
3. Number of Children (under age 18)	0
4. Number of Persons with Unknown Age	0
5. Number of Leavers	1
6. Number of Adult Leavers	1
7. Number of Adult and Head of Household Leavers	1
8. Number of Stayers	6
9. Number of Adult Stayers	6
10. Number of Veterans	2
11. Number of Chronically Homeless Persons	1
12. Number of Youth Under Age 25	0
13. Number of Parenting Youth Under Age 25 with Children	0
14. Number of Adult Heads of Household	6
15. Number of Child and Unknown-Age Heads of Household	0
16. Heads of Households and Adult Stayers in the Project 365 Days or More	0

6a - Data Quality: Personally Identifiable Information

Data Element	Client Doesn't Know/Client Refused	Information Missing	Data Issues	% of Error Rate
Name (3.1)	0	0	0	0%
SSN (3.2)	0	5	1	86%
Date of Birth (3.3)	0	0	0	0%
Race (3.4)	0	0		0%
Ethnicity (3.5)	0	0		0%
Gender (3.6)	0	0		0%
Overall Score				86%

APR Report

15 - Living Situation

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Homeless Situations					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	2	2	0	0	0
Transitional housing for homeless persons (including homeless youth)	0	0	0	0	0
Place not meant for habitation	5	5	0	0	0
Safe Haven	0	0	0	0	0
Interim Housing	0	0	0	0	0
Subtotal	7	7	0	0	0
Institutional Settings					
Psychiatric hospital or other psychiatric facility	0	0	0	0	0
Substance abuse treatment facility or detox center	0	0	0	0	0
Hospital or other residential non-psychiatric medical facility	0	0	0	0	0
Jail, prison, or juvenile detention facility	0	0	0	0	0
Foster care home or foster care group home	0	0	0	0	0
Long-term care facility or nursing home	0	0	0	0	0
Residential project or halfway house with no homeless criteria	0	0	0	0	0
Subtotal	0	0	0	0	0
Other Locations					
Permanent Housing (other than RRH) for formerly homeless persons	0	0	0	0	0
Owned by client, no ongoing housing subsidy	0	0	0	0	0
Owned by client, with ongoing housing subsidy	0	0	0	0	0
Rental by client, no ongoing housing subsidy	0	0	0	0	0
Rental by client, with VASH housing subsidy	0	0	0	0	0
Rental by client, with GPD TIP housing subsidy	0	0	0	0	0
Rental by client, with other housing subsidy (including RRH)	0	0	0	0	0
Hotel or motel paid for without emergency shelter voucher	0	0	0	0	0
Staying or living in a friend's room, apartment or house	0	0	0	0	0
Staying or living in a family member's room, apartment or house	0	0	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data not collected	0	0	0	0	0
Subtotal	0	0	0	0	0
Total	7	7	0	0	0

APR Report

23b - Exit Destination - 90 Days or Less

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Permanent Destinations					
Moved from one HOPWA funded project to HOPWA PH	0	0	0	0	0
Owned by client, no ongoing housing subsidy	0	0	0	0	0
Owned by client, with ongoing housing subsidy	0	0	0	0	0
Rental by client, no ongoing housing subsidy	0	0	0	0	0
Rental by client, with VASH housing subsidy	0	0	0	0	0
Rental by client, with GPD TIP housing subsidy	0	0	0	0	0
Rental by client, with other ongoing housing subsidy	0	0	0	0	0
Permanent Housing (other than RRH) for formerly homeless persons	1	1	0	0	0
Staying or living with family, permanent tenure	0	0	0	0	0
Staying or living with friends, permanent tenure	0	0	0	0	0
Rental by client, with RRH or equivalent subsidy	0	0	0	0	0
Subtotal	1	1	0	0	0
Temporary Destinations					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	0	0	0	0	0
Moved from one HOPWA funded project to HOPWA TH	0	0	0	0	0
Transitional housing for homeless persons (including homeless youth)	0	0	0	0	0
Staying or living with family, temporary tenure (e.g., room, apartment or house)	0	0	0	0	0
Staying or living with friends, temporary tenure (e.g., room apartment or house)	0	0	0	0	0
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	0	0	0	0	0
Safe Haven	0	0	0	0	0
Hotel or motel paid for without emergency shelter voucher	0	0	0	0	0
Subtotal	0	0	0	0	0

APR Report

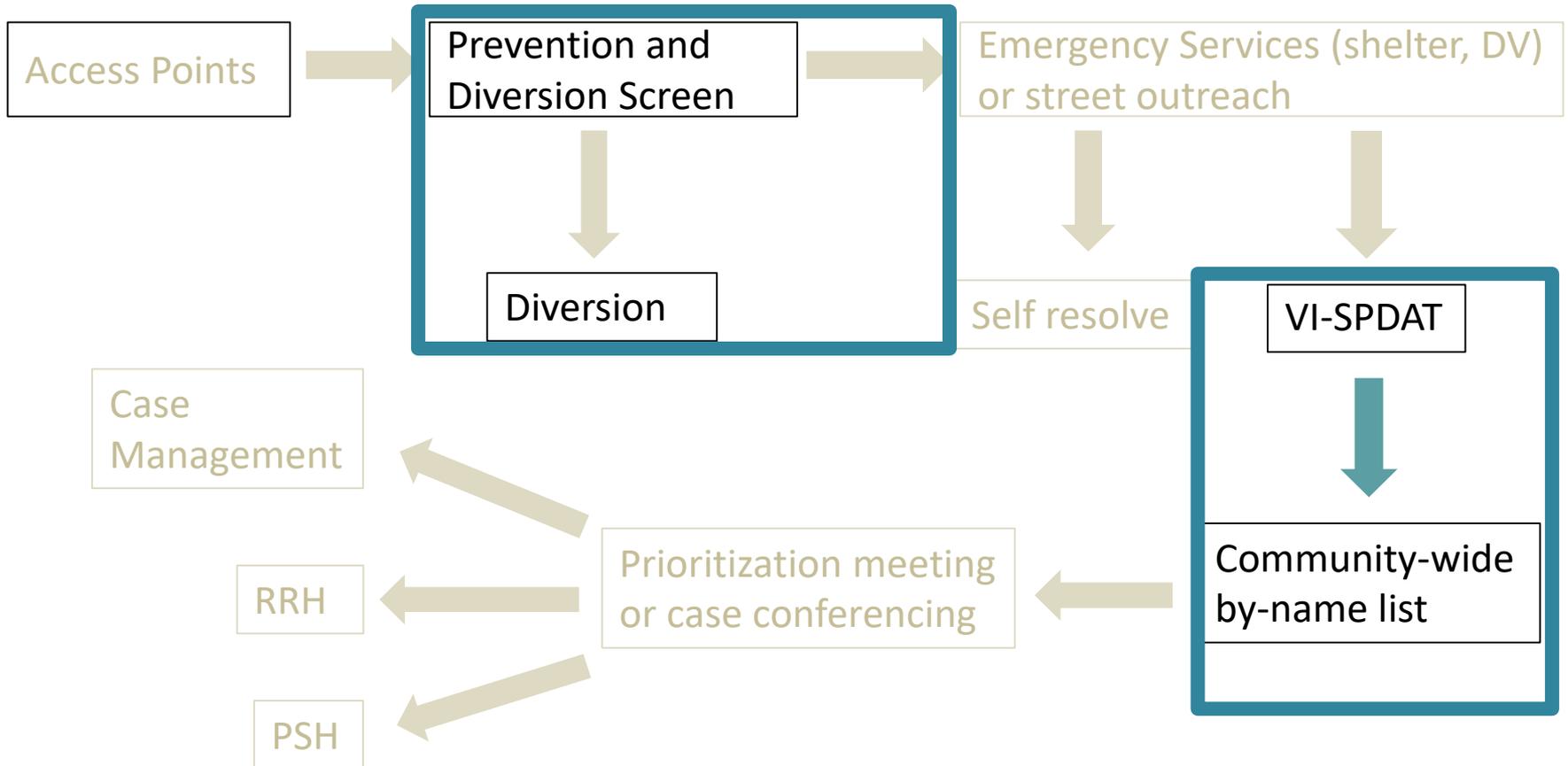
Institutional Settings

Foster care home or foster care group home	0	0	0	0	0
Psychiatric hospital or other psychiatric facility	0	0	0	0	0
Substance abuse treatment facility or detox center	0	0	0	0	0
Hospital or other residential non-psychiatric medical facility	0	0	0	0	0
Jail, prison, or juvenile detention facility	0	0	0	0	0
Long-term care facility or nursing home	0	0	0	0	0
Subtotal	0	0	0	0	0

Other Destinations

Residential project or halfway house with no homeless criteria	0	0	0	0	0
Deceased	0	0	0	0	0
Other	0	0	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected (no exit interview completed)	0	0	0	0	0
Subtotal	0	0	0	0	0
Total	1	1	0	0	0
Total persons exiting to positive housing destinations	0	0	0	0	0
Total persons whose destinations excluded them from the calculation	0	0	0	0	0
Percentage	0%	0%	0%	0%	0%

SSO-CE Projects in HMIS

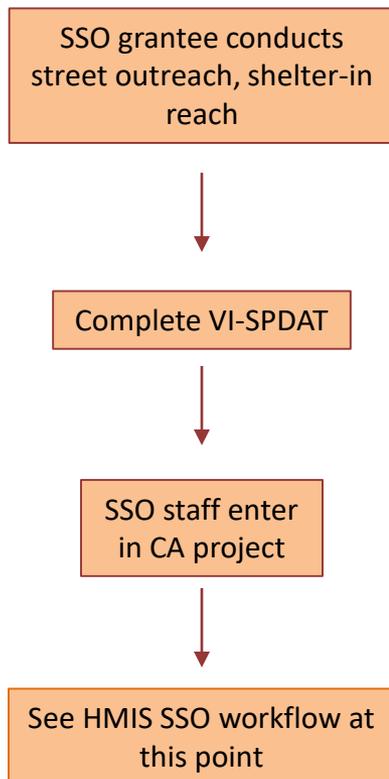




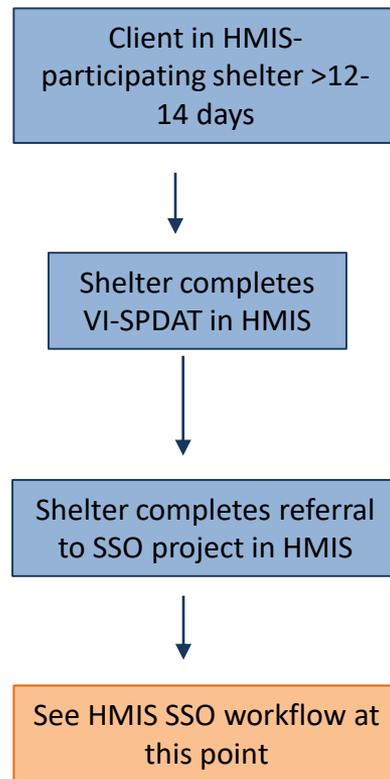
COORDINATED ASSESSMENT WORKFLOWS

4 Pre-HMIS Workflows: Pick a Path

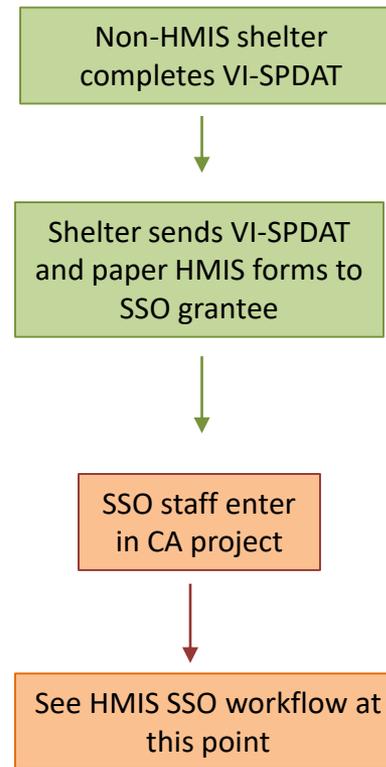
1: SSO grantee workflow



2: HMIS shelter workflow



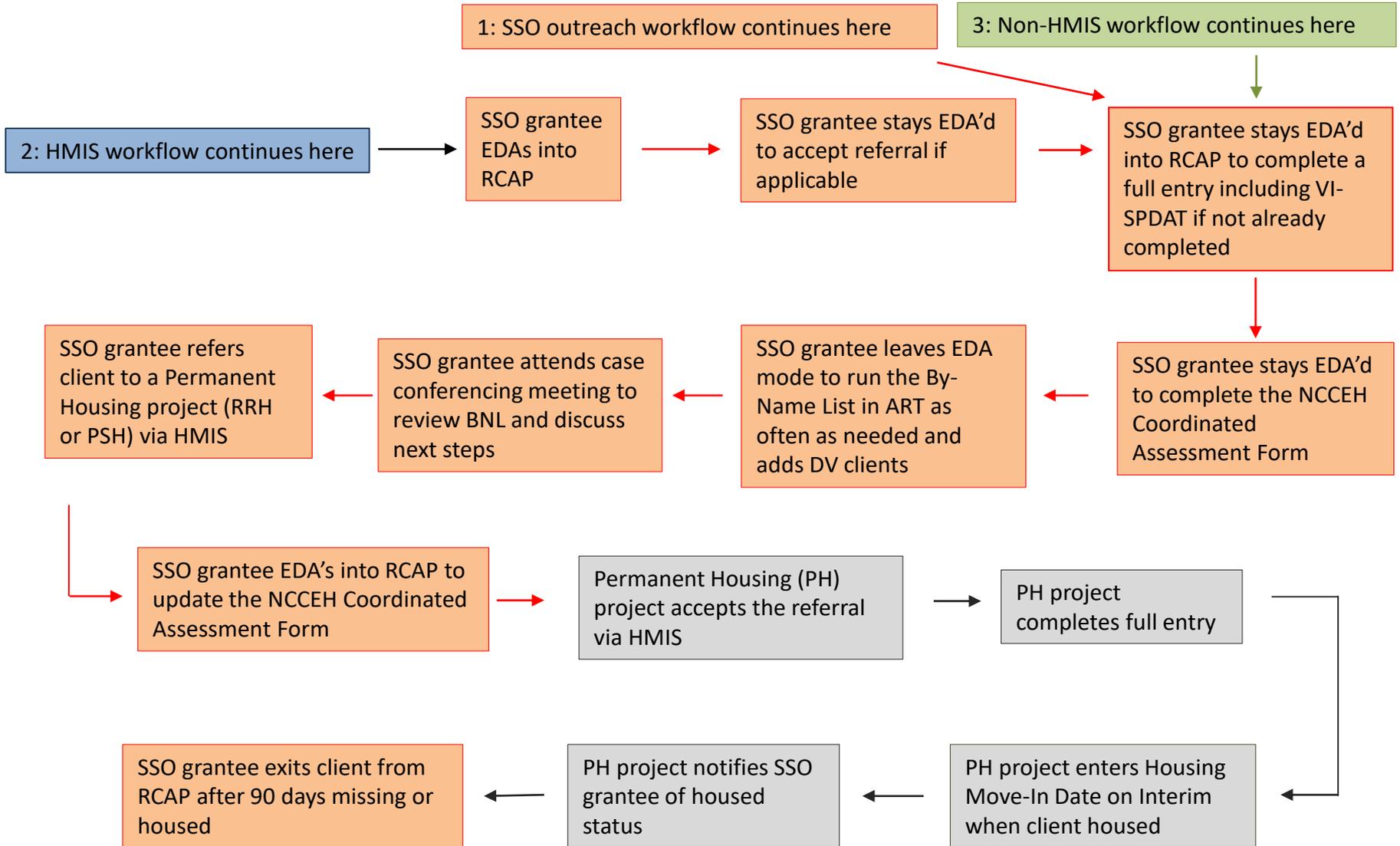
3: Non-HMIS shelter workflow



4: DV shelter workflow



HMIS Workflow

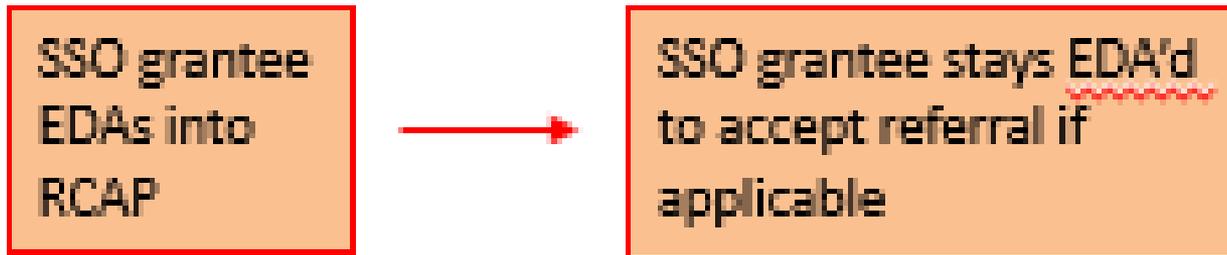


**Clients served by DV agencies are not entered into RCAP, but may be entered into HMIS by a HMIS participating PH project. All clients served by DV agencies will be included on the BNL for prioritization and case conferencing purposes.



LET'S VISUALIZE THIS IN HMIS

Accepting HMIS shelter referral



-The SSO grantee **must** use Enter Data As (EDA) to access the Regional Coordinated Assessment Project (RCAP)

-This is the **only** way to accept the HMIS-participating shelter referral

Backdate if not entering data same day

Andrea Carey 
System Admin I

Mode:  Shadow
 Enter Data As
 Back Date
 Connect To ART

Click Back Date 

Enter date
Click Set Back
Date Button



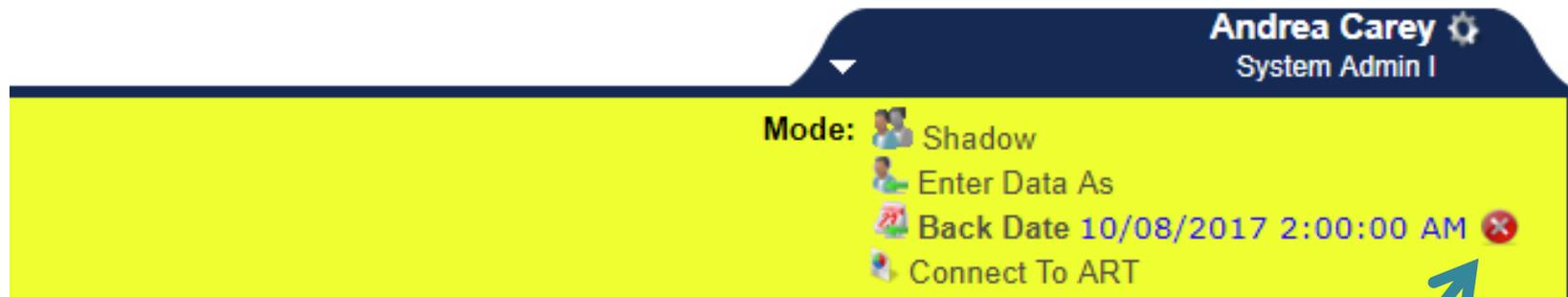
Back Date Mode 

Back Date Mode allows you to enter historic information for a client.

10 / 08 / 2017    2 ▾ : 00 ▾ : 00 ▾ AM ▾

How Back Date Mode should look

Top ribbon is yellow when
in Back Date mode

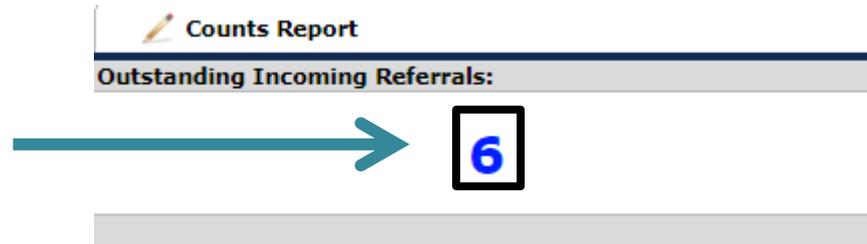


To exit Backdate mode

Monitor unaccepted referrals

1

Look at the Counts report on the Home screen dashboard to see number of unaccepted referrals



2

Click on the HMIS ID to access client record

A screenshot of a table titled 'Count Details' with the subtitle 'Outstanding Incoming Referrals'. The table has seven columns: Client ID, Call Record ID, Group ID, Household ID, Referral Date, Referral Ranking, and Need Type. The first row is highlighted, and the 'Client ID' '13' is enclosed in a black box. A teal arrow points from the left towards this box. Below the table is a 'Download Full Report' button and a status bar indicating 'Showing 1-6 of 6'.

Client ID	Call Record ID	Group ID	Household ID	Referral Date	Referral Ranking	Need Type
13				09/15/2018	High	Housing Related Coordin
22				08/12/2018		Case/Care Management
82				08/12/2018		Case/Care Management
92				08/01/2018	Medium	Housing Related Coordin
104				08/01/2018	Medium	Housing Related Coordin
303				08/01/2018	High	Housing Related Coordin

View and accept shelter referral in service transaction

1 Click Service Transaction tab after accessing client record

Client - (13) One, Test

 (13) One, Test
Release of Information: **None**

Client Information

Service Transactions

Service Transaction Dashboard

 Add Need	 Add Service	 Add Multiple Services
 View Shelter Stays	 View Entire Service History	

2 Click here to view the shelter referral

Open Referral Editing

Client - (13) One, Test

 (13) One, Test
Release of Information: None

Client Information

Needs

Services

Referrals

All Service Transactions

Select Dates

Start Date

-Select-

/ /



Transaction Type

Date

Provider

Need

09/15/2018

Heading Home - Rowan County - Emergency Shelter - State ESG

Referral

09/15/2018

NC Balance of State - Region 7 Coordinated Assessment Project

3

Click pencil to view the actual shelter referral

Add VI-SPDAT if needed

Search for VI-SPDAT score

Referral Data

Referred-To Provider	NC Balance of State - Region 7 Coordinated Assessment Project (7465)
Needs Referral Date *	09 / 15 / 2018 2 : 00 : 00 AM
Referral Ranking	High
VI-SPDAT Score	10 Recorded using VI-SPDAT v2.0 (Individual) on 09/01/2018 by Heading Home - Rowan County - Emergency Shelter - State ESG (7389) <input type="button" value="Search"/> <input type="button" value="Clear"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
Referral Outcome	-Select-

4



Search

Clear

Select VI-SPDAT Score

Household Members	VI-SPDAT v2.0 (Individual)	VI-SPDAT 1.0																
<input checked="" type="checkbox"/> (13) One, Test Age: 48	<table><thead><tr><th>Provider</th><th>Start Date</th><th>* PRE-SURVEY</th><th>A. HISTORY OF HOUSING AND HOMELESSNESS</th><th>B. RISKS</th><th>C. SOCIALIZATION & DAILY FUNCTIONS</th><th>D. WELLNESS</th><th>GRAND TOTAL</th></tr></thead><tbody><tr><td>Heading Home - Rowan County - Emergency Shelter - State ESG (7389)</td><td>09/01/2018</td><td>0</td><td>0</td><td>4</td><td>2</td><td>4</td><td>10</td></tr></tbody></table>	Provider	Start Date	* PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL	Heading Home - Rowan County - Emergency Shelter - State ESG (7389)	09/01/2018	0	0	4	2	4	10	
Provider	Start Date	* PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL											
Heading Home - Rowan County - Emergency Shelter - State ESG (7389)	09/01/2018	0	0	4	2	4	10											



5

Click + sign to add VI-SPDAT score to referral if not already included in referral

Exit

Update Referral Outcome

Household Members

This Client is not a member of any Households.

Need Information

Need	Housing Related Coordinated Entry (BH-0500.3200)
Provider	Heading Home - Rowan County - Emergency Shelter - State ESG (7389)
Date of Need	09/15/2018 02:00:00 AM
Amount if Financial	No amount entered.
Notes	No notes entered.

Referral Data

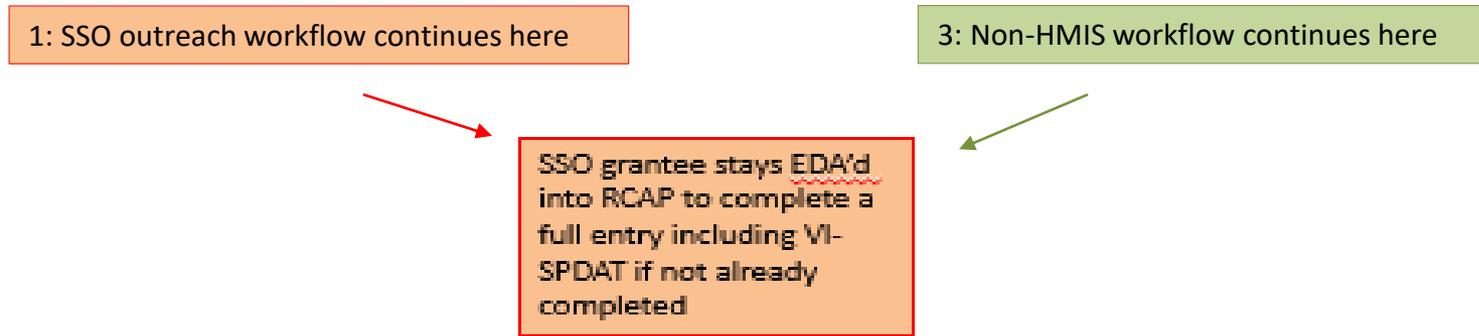
Referred-To Provider	NC Balance of State - Region 7 Coordinated Assessment Project (7465)		
Needs Referral Date *	09 / 15 / 2018	2 : 00 : 00 AM	
Referral Ranking	High		
VI-SPDAT Score	10	Recorded using VI-SPDAT v2.0 (Individual) on 09/01/2018 by Heading Home - Rowan County - Emergency Shelter - State ESG (7389)	<input type="button" value="Search"/> <input type="button" value="Clear"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score	<input type="button" value="Search"/> <input type="button" value="Clear"/>	
VI-FSPDAT Score	Please Select a VI-FSPDAT Score	<input type="button" value="Search"/> <input type="button" value="Clear"/>	
Referral Outcome	Accepted		



6

Review information, change Referral Outcome to Accepted, then click Save & Exit to leave referral screen

Complete RCAP entry after accepting the shelter referral



The SSO grantee will need to use Enter Data As and Back Date mode to complete a Release of Information (ROI), full entry into the Regional Coordinated Assessment Project (RCAP), VI-SPDAT (if not already completed), and NCCEH Coordinated Assessment Form.

*This is where the SSO Outreach and Non-HMIS workflows intersect with the HMIS

Release of Information (ROI) Tips

- Triggers security, visibility and sharing
- For every client served
- Must match project name at entry (level 5)
- Good for one year

*Option to attach
paper documentation
to record in HMIS*



Click on the ROI tab



Client Information				Service Transactions				
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Assessments

Adding an ROI in ClientPoint

Client - (13) One, Test



(13) One, Test

Release of Information: **None**

Client Information

Summary

Client Profile

Households

ROI

Release of Information

Provider

Add Release of Information

Enter an ROI for Client

Release of Information

Release of Information - (13) One, Test

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *	NC Balance of State - Region 7 Coordinated Assessment Project (7465)
Release Granted *	Yes
Start Date *	09 / 20 / 2018
End Date *	09 / 19 / 2019
Documentation	Signed Statement from Client
Witness	JHM

Save Release of Information Cancel

Select all HH members as appropriate →

Confirm level 5 provider →

Enter agreed upon dates →



Add full entry for RCAP

1 Make sure ROI is present

2 Click this tab to access the Add Entry/Exit button

Client - (13) One, Test

(13) One, Test
Release of Information: Ends 09/19/2019

Client Information

Summary Client Profile Households ROI **Entry / Exit** Case

Service Transactions

Reminder: Household members must be established on Households tab before creating En

Program	Type	Project Start Date
Heading Home - Rowan County - Emergency Shelter - State ESG (7389)	HUD	09/01/2018

Add Entry / Exit

Showing 1-1 of

3 Click here to add RCAP entry

Pick Entry Type

Project Start Data - (13) One, Test

Household Members

This Client is not a member of any Households.

Project Start Data - (13) One, Test

Provider*	NC Balance of State - Region 7 Coordinated Assessment Project (7465) ▼
Type*	HUD ▼
Project Start Date*	09 / 20 / 2018    5 ▼ : 40 ▼ : 44 ▼ PM ▼

4

Make sure Type is HUD and Provider and Start Date are correct before clicking Save & Continue to access entry questions and VI-SPDAT



Save & Continue

Cancel

Complete Entry Assessment UDEs

Entry Assessment

Household Members NC HMIS CoC Intake (3.917B) Entry Date: 09/20/2018 05:40:44 PM

(13) One, Test
Age: 48
Veteran: No (HUD)

General Demographic Information:
****ANSWER FOR ALL CLIENTS, INCLUDING CHILDREN unless specified otherwise****

Relationship to Head of Household: Self (head of household) G

Date of Birth: 01 / 01 / 1970 G

Date of Birth Type: Full DOB Reported (HUD) G

Gender: Female G

Primary Race: Black or African American (HUD) G

Secondary Race: Black or African American (HUD) G

Ethnicity: Non-Hispanic/Non-Latino (HUD) G

5
Click each household member to answer their entry questions

Use for Individuals:

VI-SPDAT v2.0 (Individual)

	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
	09/01/2018	0	0	4	2	4	10

Add Showing 1-1 of 1

6
Scroll to bottom of entry assessment to add a VI-SPDAT score if not already completed

Start the NCCEH Coordinated Assessment Form

SSO grantee stays EDA'd
to complete the NCCEH
Coordinated
Assessment Form

The SSO grantee **must** use Enter Data As and Back Date mode to start the NCCEH Coordinated Assessment Form.

The SSO grantee will return to this form once the client has been referred to a Permanent Housing (PH) project or any other information needs to be updated.

Complete the NCCEH Coordinated Assessment Form

1 Click Assessment tab to access the form

The screenshot shows a software interface with a horizontal menu bar at the top. The menu items are 'Service Transactions', 'Entry / Exit', 'Case Managers', 'Case Plans', and 'Assessments'. The 'Assessments' tab is highlighted with a black border. Below the menu bar, there is a section titled 'Select an Assessment' with a dropdown menu showing 'NCCEH Coordinated Assessment Form' and a 'Submit' button. At the bottom right of the interface, there are 'Save' and 'Cancel' buttons. A green horizontal line is visible below the 'Select an Assessment' section.

2 Find the correct form and click Submit

3 Click Save to open up the form

Add/Update Information

NCCEH Coordinated Assessment Form

Client Status Information

Is Client Chronically Homeless?	Yes	G
If yes, is chronic verification attached?	Yes	G
Client Status	Needs case conferencing	G

Coordinated Assessment Dates

VI-SPDAT Date	09 / 20 / 2018	⚠️ ↻ 🟢 G
Date case conferences	09 / 24 / 2018	⚠️ ↻ 🟢 G
Housing Assessment Disposition (Coordinated Assessment)	-Select-	▼ G
If Other Housing Assessment Disposition, specify (Coordinated Assessment)		G
Date referred to a housing provider	□ / □ / □	⚠️ ↻ 🟢 G
Housing Move-in Date	□ / □ / □	⚠️ ↻ 🟢 G

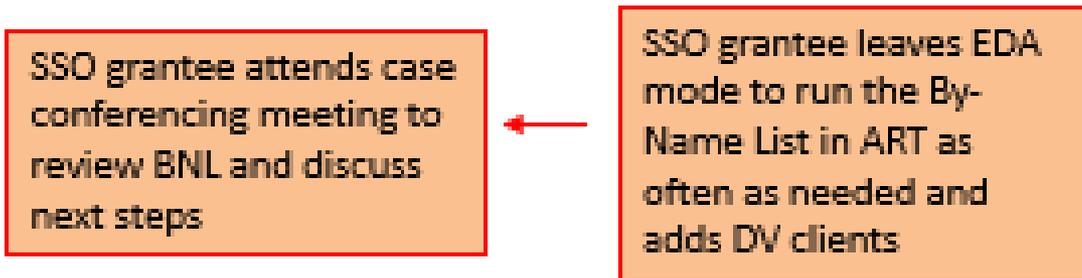
Please do not remove clients from your community's Active By Name List without approval. Dates and reasons should be confirmed prior to data entry

Date removed from Active By-Name List	□ / □ / □	⚠️ ↻ 🟢 G
Reason client was removed from Active By-Name List	-Select-	▼ G

Print Assessment

4 Complete all known information

Run the By-Name List report to prepare for case conferencing



The SSO grantee must access ART in order to run the BNL report for review at the case conferencing meeting.

The SSO grantee must manually add DV clients to the final BNL report to ensure they are also discussed and prioritized at the meeting.

Access the By-Name List report in ART

Advanced Reporting Tool

ART Browser

- ▶ Inbox
- ▶ Favorites
- ▶ Available Reports and Templates
- ▶ Bowman Systems Resources
- ▼ Public Folder
 - ▼ Provider Specific
 - ▶ Data Center at NCCEH
 - ▶ ESG Grantees
 - ▶ NC-500 Forsyth
 - ▶ NC-501 Buncombe
 - ▶ NC-502 Durham
 - ▼ NC-503 Balance of State
 - ▶ 2017 HIC/PIT
 - ▶ CoC Application
 - ▶ 0212-Duplicate Clients In SP - v2 NCCEH CoC
 - ▶ 2016- Weekly ECCCM Payment Pending Report
 - ▶ All Clients Demographics Report -Additional County Tabs - Group (Andrea's Edit)
 - ▶ Bed and Unit Utilization By Provider 2017
 - ▶ By-Name List of People Experiencing Homelessness
 - ▶ NCEH VI-SPDATv2(Family & Singles) By Name List

1 Click the black triangle then scroll to Provider Specific

2 Click the black triangle then scroll down to NC-503 folder

3 Click black triangle, then scroll down to By-Name List report

4 Click magnifying glass next to the By-Name List report

Permanent Housing referral post case conferencing

SSO grantee refers client to a Permanent Housing project (RRH or PSH) via HMIS

The SSO grantee will refer a client to a Rapid Re-Housing or Permanent Supportive Housing project (via HMIS if possible) depending upon outcome of case conferencing. Use EDA and Backdate mode (if needed) before making referral.

If the client disappears the SSO grantee exits client from the RCAP project after 90 days of no contact.

Permanent Housing referral via HMIS

▼ Household Members

This Client is not a member of any Households.

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Homeless Diversion Programs (BH-0500.3100)
- Homelessness Prevention Programs (BH-0500.3140)
- Homeless Permanent Supportive Housing (BH-8400.3000)
- Housing Related Coordinated Entry (BH-0500.3200)
- Housing/Shelter (BH)
- Rapid Re-Housing Programs (BH-0500.7000)

1 Select the correct service code

2 Select Add Terms

Add Terms

Service Code Look-Up

Add Terms & Go To Search Results

Referral Provider Quicklist

Provider

Heading Home - Rowan County - Permanent Supportive Housing - HUD (7441)

Add Provider

Bed Availability

3 Select correct project from dropdown and click Add Provider

Check Referral Information

Selected Providers

Provider ^	Type	Phone	Location	Last Updated
Heading Home - Rowan County - Permanent Supportive Housing - HUD	Level 5	Unknown	Unknown	09/21/2018

Showing 1-1 of 1

▼ **Refer to Providers**

Referral Data

Needs Referral Date * 09 / 21 / 2018 6 : 29 : 17 AM

Referral Ranking -Select- ▼

VI-SPDAT Score 10 Recorded using VI-SPDAT v2.0 (Individual) on 09/01/2018 by Heading Home - Rowan County - Emergency Shelter - State ESG (7389)

TAY-VI-SPDAT Score Please Select a TAY-VI-SPDAT Score

VI-FSPDAT Score Please Select a VI-FSPDAT Score

Projected Follow Up Date / /

Follow Up User NC Balance of State - Region 7 Coordinated Assessment Project (7465)

[Check to notify ServicePoint Providers by Email.](#)

Referrals [Send Summary](#)

Referred-To Provider	Homeless Permanent Supportive Housing	Referred Clients
Heading Home - Rowan County - Permanent Supportive Housing - HUD (7441)	<input checked="" type="checkbox"/>	(13) One, Test

▼ **Need Data**

Date of Need * 09 / 21 / 2018 6 : 29 : 17 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Homeless Permanent Supportive Housing (BH-8400.3000)	<input type="text"/>	Identified Service Pending ▼ -Select- ▼	

Make sure all data incl. VI-SPDAT is present and accurate before clicking Save ALL

Update the NCCEH Coordinated Assessment Form

SSO grantee EDA's into RCAP to update the NCCEH Coordinated Assessment Form

The SSO grantee will need to use Enter Data As and Back Date mode to update the NCCEH Coordinated Assessment Form to reflect referral to a Permanent Housing (PH) project.

Update the NCCEH Coordinated Assessment Form

1 Click Assessment tab to access the form

The screenshot shows a software interface with a horizontal menu bar at the top. The menu items are 'Service Transactions', 'Entry / Exit', 'Case Managers', 'Case Plans', and 'Assessments'. The 'Assessments' tab is highlighted with a black border. Below the menu bar, there is a section titled 'Select an Assessment' which contains a dropdown menu with 'NCCEH Coordinated Assessment Form' selected and a 'Submit' button. At the bottom right of the interface, there are 'Save' and 'Cancel' buttons. A green horizontal line is visible below the 'Select an Assessment' section.

2 Find the correct form and click Submit

3 Click Save to open up the form

Update/Add information

NCCEH Coordinated Assessment Form

Client Status Information

Is Client Chronically Homeless?	Yes	G
If yes, is chronic verification attached?	Yes	G
Client Status	Needs case conferencing	G

Coordinated Assessment Dates

VI-SPDAT Date	09 / 20 / 2018	   G
Date case conferences	09 / 24 / 2018	   G
Housing Assessment Disposition (Coordinated Assessment)	-Select- ▼	
If Other Housing Assessment Disposition, specify (Coordinated Assessment)	<input type="text"/> G	
Date referred to a housing provider	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G
Housing Move-in Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G

Please do not remove clients from your community's Active By Name List without approval. Dates and reasons should be confirmed prior to data entry

Date removed from Active By-Name List	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G
Reason client was removed from Active By-Name List	-Select- ▼ G	

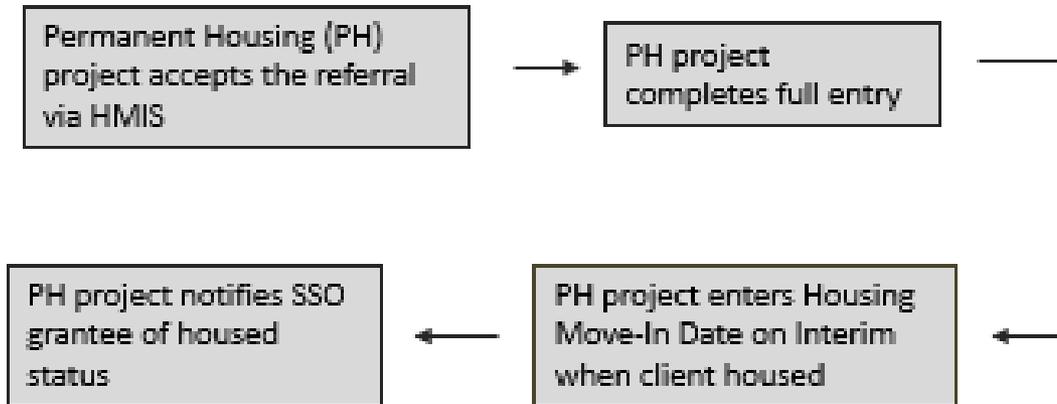
Print Assessment

4

Complete and update all known information



Next Steps



This part of workflow is completed by the Permanent Housing project that accepts the referral.

Exit from RCAP and remove from BNL

SSO grantee exits client from RCAP after 90 days missing or housed

The SSO grantee will need to exit clients after 90+ days of being housed or 90+ days missing. PH projects will need to notify the SSO grantee when a client is housed. DV agencies can also notify the SSO grantee when it is time to remove DV clients from the BNL.

Add full exit for RCAP

Client - (481427) again, test

(481427) again, test

Release of Information: Ends 09/10/2019

Client Information

Service Transactions

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

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

Entry / Exit

Program	Type	Project Start Date	Exit Date
 NC Balance of State - Piedmont (Region 5) Coordinated Assessment Project (7595)	HUD	 09/10/2018	

Click the pencil next to Exit Date to exit client from the Regional Coordinated Assessment Project

Complete RCAP exit incl Housing Disposition Assessment

Edit Exit Data - (481427) again, test

Edit Exit Data - (481427) again, test

Exit Date *	09 / 21 / 2018 2 : 44 : 59 PM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Permanent housing (other than RRH) for formerly homeless persons (HUD)
If "Other", Specify	
Notes	

1 Select appropriate destination from dropdown

2 Select Save & Continue to access rest of exit assessment

Save & Continue Cancel

Complete the whole Exit Assessment

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(481427) again, test		09/10/2018	09/21/2018			Completed program	Permanent housing (other than RRH) for formerly homeless persons (HUD)	

Showing 1-1 of 1

Entry Assessment

Exit Assessment

Household Members

(481427) again, test
 Age: 37
 Veteran: No (HUD)

Exit Date: 09/21/2018 02:44:59 PM

NC HMIS Exit

Answer Following 3 Questions For Prevention Projects Only

Housing Assessment at Exit ▼ G

-Select-

If Able to maintain housing at entry, Subsidy Information ▼ G

-Select-

If Moved to new housing unit, Subsidy information ▼ G

-Select-

Covered by Health Insurance ▼ G

No (HUD)

Health Insurance
HUD Verification

	Start Date *	Health Insurance Type	Covered?	(HOPWA) If Private Pay Insurance, Specify	(HOPWA) If No, Reason not covered	End Date
	09/10/2018	Other	No			
	09/10/2018	State Health Insurance for Adults	No			
	09/10/2018	Indian Health Services Program	No			
	09/10/2018	Private Pay Health Insurance	No			
	09/10/2018	Veteran's Administration (VA) Medical Services	No			

*Review all of the exit information to ensure accuracy

Complete Housing Assessment Disposition

Non-Cash Benefits HUD Verification 

Source of Non-Cash Benefit *	Start Date *	End Date	Amount of Non-Cash Benefit	Receiving Benefit?
<input type="button" value="Add"/>				

Housing Assessment Disposition (Coordinated Assessment)

If Other Housing Assessment Disposition, specify (Coordinated Assessment)

Contact Information

Start Date *

Outreach

Date of Contact	Staying on street, ES, or SH	Start Date *	End Date	Notes
<input type="button" value="Add"/>				

-Select-

-Select-

Referred to emergency shelter/safe haven

Referred to transitional housing

Referred to rapid re-housing

Referred to permanent supportive housing

Referred to homelessness prevention

Referred to street outreach

Referred to other continuum project type

Referred to a homelessness diversion program

Unable to refer/accept within continuum; ineligible for continuum projects

Unable to refer/accept within continuum; continuum services unavailable

Referred to other community project (non-continuum)

Applicant declined referral/acceptance

Applicant terminated assessment prior to completion

Other/specify

Click Save & Exit once exit assessment is complete



SERVICE TRANSACTIONS

Approved Service Codes

The SSO grant allows specific services. BoS has identified the service codes that should be used to identify these services

Service Code	Service Code Name	SSO Grantee Activity
BH-0500.3200	Housing related coordinated entry	VI-SPDAT assessment
BH-0500.3100	Homeless diversion programs	P&D screen
BH-0500.3140	Homelessness Prevention programs	Prevention Activities
PH-8000	Street Outreach Programs	Street outreach Activities
PH-1000.8500	transitional case/care management	Developing housing plan/other case management
TJ-3000.8000	specialized information and referral	Information/referrals
FP-0500.8000	system advocacy	system advocacy
DD-1500.4650	Housing Complaints	Handling grievances

Service Transactions

Services transactions should be used whenever an assessment is completed or service is provided by SSO grantee

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

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
NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD

Showing 1-1 of 1

Add Service

Client - (173) Marie, Bobby Brown



(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

Client Information

Service Transactions

Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services



Add Referrals



View Previous Service Transactions



View Shelter Stays



View Entire Service History

Add dates, and Service Type

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

Client Information

Service Transactions

Add Service

Household Members

Add household members if needed

This Client is not a member of any Households.

Service Provider * NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Creating User Nicole Purdy

Start Date * 09 / 18 / 2018 4 : 30 : 52 PM

End Date 09 / 18 / 2018 4 : 31 : 23 PM

Service Type * Homeless Diversion Programs (BH-0500.3100) Look Up

Provider Specific Service -Select-

Auto-populates to your EDA mode

Check household members, then scroll down for more details

Client Information

Service Transactions

Edit Service

▼ Household Members

This Client is not a member of any Households.

Service Provider *  NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Creating User Nicole Purdy

Start Date * 09 / 18 / 2018    4 ▼ : 30 ▼ : 52 ▼ PM ▼

End Date 09 / 18 / 2018    4 ▼ : 31 ▼ : 23 ▼ PM ▼

Service Type *  Homeless Diversion Programs (BH-0500.3100)

Provider Specific Service

Service Notes

Skip the next few options

These may not apply to your projects

Service Costs

Number of Units	<input type="text"/>
Unit Type	-Select- ▼
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>

▶ Apply Funds for Service

Conditional Commitments

Responsible Party ▲

Condition

Due Date

Status

Add Conditional Commitment

Print Commitment Letter

No matches.

Support Documentation

- Optional, but helpful electronic record
- Add File Attachments under Support Documentation

Support Documentation			
Date Added	Name	Description	Type
<input type="button" value="Add Support Documentation"/>		No matches.	

Upload Support Documentation

Name *	<input type="button" value="Choose File"/> No file chosen
Description	<input type="text"/>

← Add file and a brief description

Complete the Service Transaction with Need Information

Does this service require further action in or out of HMIS?

- Make sure that if the Need Status is not “Closed” there is a plan to close it

The screenshot displays a software interface with two main sections: 'Follow Up Information' and 'Need Information'. The 'Follow Up Information' section includes fields for 'Projected Follow Up Date', 'Follow Up User', 'Follow Up Made', and 'Completed Follow Up Date'. The 'Need Information' section includes 'Need Status *', 'Outcome of Need', and 'If Need is Not Met, Reason'. A dropdown menu is open over the 'Need Status *' field, showing options: '-Select-', 'Canceled', 'Closed', 'Identified' (highlighted), 'In Progress', 'No Show', 'z-ECCM Counseling Appointment Pending', 'z-GUM Blessed Table', 'z-GUM Loan Repayment', 'z-GUM Market St', and 'z-SAG FPFA Default Amt Paid'. Another dropdown menu is open over the 'Outcome of Need' field, showing options: '-Select-', 'Fully Met' (highlighted), 'NCHFA Paid', 'Not Met', 'Partially Met', and 'Service Pending'. At the bottom right, there are three buttons: 'Save', 'Save & Exit' (highlighted with a red box), and 'Exit'. The 'Follow Up User' field contains the text 'y - Fresh Start II RRH - HUD (7168)'.

Add Services (can use Multiple if needed)

Client - (173) Marie, Bobby Brown



(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

Client Information

Service Transactions

Service Transaction Dashboard



Add Need



Add Service



Add Multiple Services



Add Referrals



View Previous Service Transactions



View Shelter Stays



View Entire Service History

Add dates, Service Code and Need Status

Household Members

Add household members if needed

This Client is not a member of any Households.

Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider* NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Auto-populates to your EDA mode

Start Date* 09 / 18 / 2018 5 : 46 : 54 PM

End Date 09 / 18 / 2018 5 : 46 : 54 PM

Service List

Number of Services 1 Need Status Identified Set All

Number of Services* 1

Service Type Homeless Diversion Programs (BH-0500.3100)

Need Information

Need Status* Identified

Confirm Service Type and Update Need Status

Remove Clear

Number of Services* 1

Service Type Homelessness Prevention Programs (BH-0500.3140)

Need Information

Need Status* Identified

Confirm Service Type and Update Need Status

Remove Clear

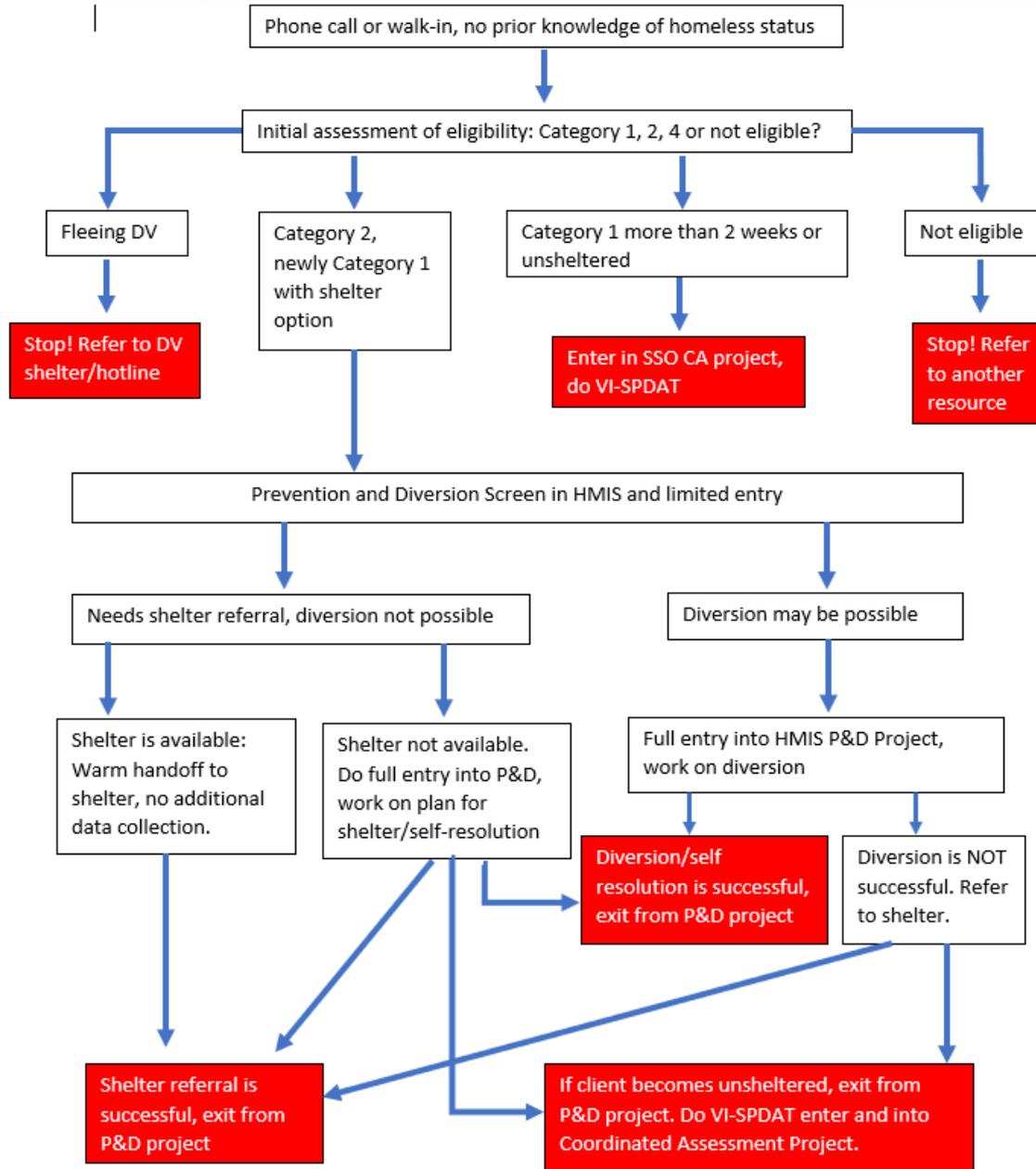
Add Another Remove All Clear All

Save & Exit Cancel



PREVENTION AND DIVERSION WORKFLOW

Workflow: Prevention and Diversion



Initial Assessment of Eligibility (via paper form)



NC Balance of State Prevention and Diversion Screen Form

Initial Homeless Assessment

1. Are you homeless or do you believe you will become homeless in the next 72 hours? Yes No
2. Are you currently residing with, or trying to leave an intimate partner, family member, caregiver, or other person in your home who threatens you or makes you fearful? Yes No



If yes to Question 2, refer to DV resources. If yes to second question, clients are referred to DV resources and **DO NOT PROCEED WITH THIS ASSESSMENT** or any part of the Coordinated Assessment process

3. Where did you sleep last night?

- | | |
|--|---|
| <input type="checkbox"/> Place not meant for habitation | <input type="checkbox"/> Interim Housing |
| <input type="checkbox"/> Foster care home or foster care group home | <input type="checkbox"/> Hospital or other residential non-psychiatric medical facility |
| <input type="checkbox"/> Jail, prison or juvenile detention facility | <input type="checkbox"/> Long-term care facility or nursing home |
| <input type="checkbox"/> Psychiatric hospital or other psychiatric facility | <input type="checkbox"/> Substance abuse treatment facility or detox center |
| <input type="checkbox"/> Hotel or motel paid for without emergency shelter voucher | <input type="checkbox"/> Owned by client, no ongoing housing subsidy |
| <input type="checkbox"/> Owned by client, with ongoing housing subsidy | <input type="checkbox"/> Permanent housing (other than RRH) for formerly homeless persons |
| <input type="checkbox"/> Rental by client, no ongoing housing subsidy | <input type="checkbox"/> Rental by client, with VASH subsidy |
| <input type="checkbox"/> Rental by client, with GPD TIP subsidy | <input type="checkbox"/> Rental by client, with other ongoing housing subsidy (including RRH) |
| <input type="checkbox"/> Residential project or hallway house with no homeless criteria | <input type="checkbox"/> Staying or living in a family member's room, apartment or house |
| <input type="checkbox"/> Staying or living in a friend's room, apartment or house | <input type="checkbox"/> Transitional housing for homeless persons (including homeless youth) |
| <input type="checkbox"/> Client doesn't know | <input type="checkbox"/> Client refused |
| <input type="checkbox"/> Emergency Shelter, including hotel or motel paid for with emergency shelter voucher | |

4. Was it a safe location? Yes No

5. If client is literally homeless: How long have you stayed there? Less than 2 weeks Longer than 2 weeks



If client is literally homeless for less than 2 weeks, skip to gathering demographic information. If client has been literally homeless for more than 2 weeks, start VI-SDPAT. If client is fleeing DV, refer to DV resources.

If the client is not literally homeless and they answered no to Question 1, ask:

6. Will you be forced to leave your current housing in the next 14 days? Yes No

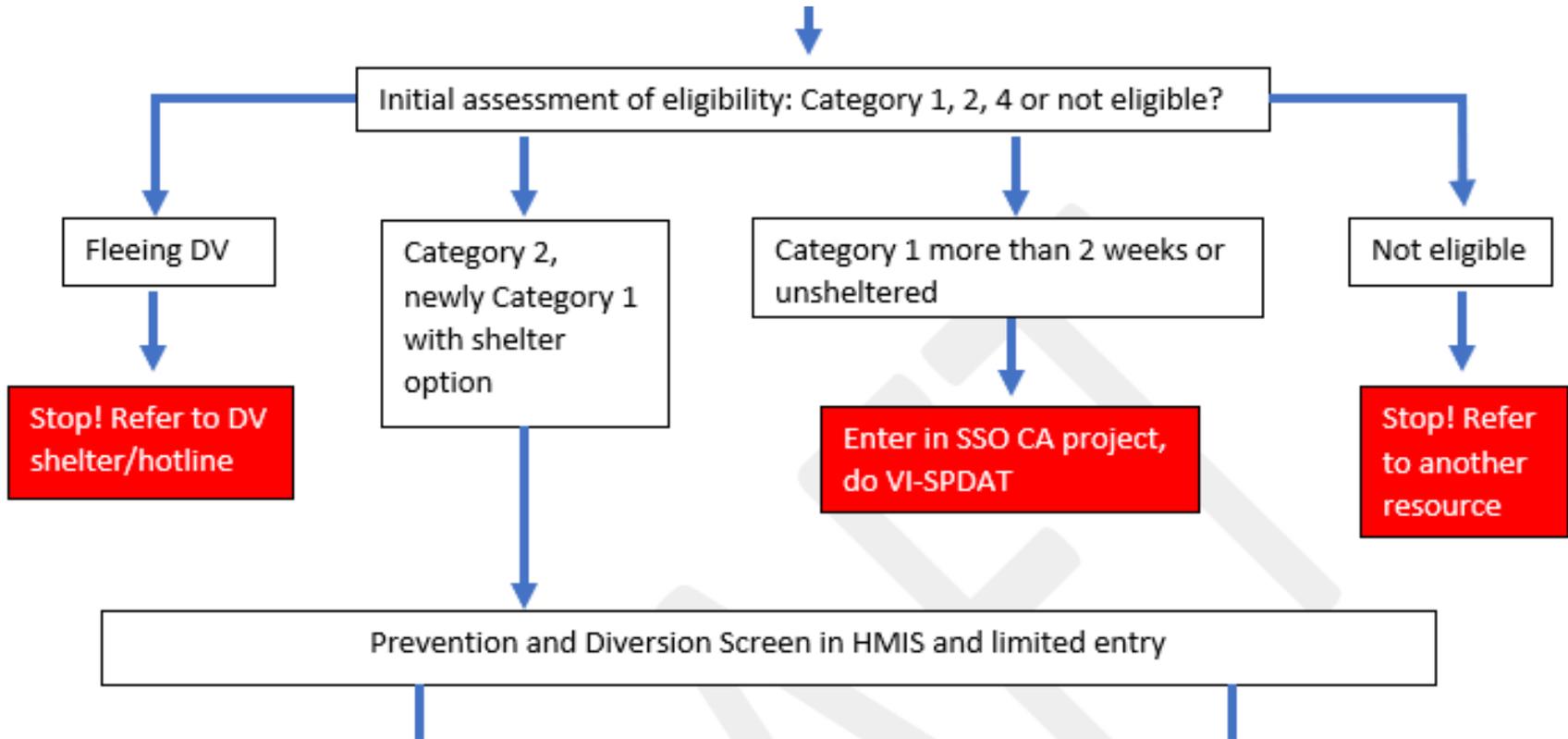
7. If yes, is it for any of the following reasons:

- In a hotel/motel, client does not have the resources to pay for the room for more than 14 days.
- In a rental unit, client has received a court order to leave in the next 14 days.
- In a rental unit owned or leased by someone else, that person is requiring the client to leave the unit in the next 14 days.



If the client answers no to #5 or #6, they are not eligible, refer to mainstream resource. If client answers yes to #5 or #6, continue with screen.

Eligibility Categories



Next steps depend on results from Initial Assessment of eligibility

Eligibility Categories

- If person/household is not homeless or at risk of being homeless within 14 days refer them to another resource
- If person/household is fleeing a domestic violence situation refer them to a DV shelter/hotline

Eligibility Categories

- If person/household is literally homeless and has been unsheltered complete the VI-SPDAT and enter them into the Coordinated Assessment Project
- If person/household is newly literally homeless but sheltered or if they will become homeless within 14 days continue with Prevention and Diversion Screen

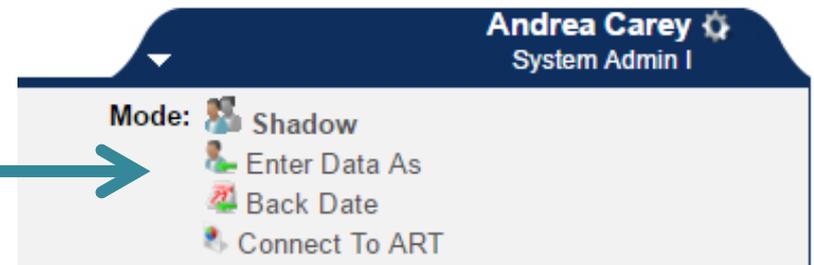


LET'S VISUALIZE THIS IN HMIS

Start Prevention and Diversion in HMIS

Select EDA before entering client data!!

1 Click Enter Data As



2 Click the green circle to select the Prevention and Diversion Project

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Provider													Level	Phone		
			NC Balance of State - Region 7 Coordinated Assessment Project (7465)										Level 5	Unknown			
			NC Balance of State - Region 7 SSO Prevention and Diversion (7466)										Level 5	Unknown			
			Telomonds of Faith - Resourc...														

Backdate if not entering data same day

Andrea Carey 
System Admin I

Mode:  Shadow
 Enter Data As
 Back Date
 Connect To ART

Click Back Date 

Enter date
Click Set Back
Date Button



Back Date Mode 

Back Date Mode allows you to enter historic information for a client.

10 / 08 / 2017    2 ▾ : 00 ▾ : 00 ▾ AM ▾

Add ROI to ensure proper sharing & visibility

Client - (173) Marie, Bobby Brown 

(173) Marie, Bobby Brown
Release of Information: **None**

Client Information | Service Transactions

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

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

← Click to add a P&D release

Release of Information - (173) Marie, Bobby Brown

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *	NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼
Release Granted *	Yes ▼
Start Date *	09 / 18 / 2018
End Date *	09 / 18 / 2019 
Documentation	Signed Statement from Client ▼
Witness	Rebecca Skloot

Make sure information is accurate before saving



Entry/Exit tab in ClientPoint

Client - (173) Marie, Bobby Brown 

(173) Marie, Bobby Brown
Release of Information: Ends 09/18/2019

Client Information Service Transactions

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



Add P&D project entry

Client - (173) Marie, Bobby Brown



(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
---------	------	--------------------	-----------	----------	------------	--------------

Add Entry / Exit



No matches.

Exit

Entry data: Household + Provider

Project Start Data - (173) Marie, Bobby Brown



Select household members entering



Household Members

This Client is not a member of any Households.

If Provider did not autopopulate, STOP



Project Start Data - (173) Marie, Bobby Brown

Provider *

NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Type *

HUD

Project Start Date *

09 / 18 / 2018



1

:

08

:

42

PM

Select HUD entry type + enter entry date



Save & Continue

Cancel

Confirm Prevention and Diversion Screen is selected

Entry/Exit Data



Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼

Type * HUD ▼

Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(173) Marie, Bobby Brown		08/15/2018						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Select an Assessment Yes

NC HMIS Update

NC HMIS Exit

NC HMIS CoC Intake (3.917B)

NCCEH Prevention and Diversion screen



Household Members

(173) Marie, Bobby Brown
Age: 35
Veteran: No (HUD)

NCCEH Prevention and Diversion screen

Entry Date: 08/15/2018 11:09:32 AM

INTRODUCTORY QUESTIONS

1. Are you homeless or do you believe you will become homeless in the next 72 hours? G

2. Are you currently residing with, or trying to leave an intimate partner, family member, caregiver or other person in your home who threatens... G

Complete Prevention and Diversion Screen Questions

Entry/Exit Data



Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼

Type * HUD ▼

Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(173) Marie, Bobby Brown		08/15/2018						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Select an Assessment Yes

- NC HMIS Update
- NC HMIS Exit
- NC HMIS CoC Intake (3.917B)
- NCCEH Prevention and Diversion screen

Household Members

- (173) Marie, Bobby Brown
Age: 35
Veteran: No (HUD)



Don't forget other Household Members

NCCEH Prevention and Diversion screen

Entry Date: 08/15/2018 11:09:32 AM

INTRODUCTORY QUESTIONS

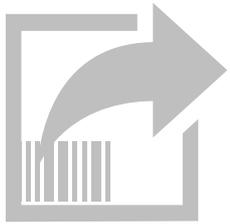
1. Are you homeless or do you believe you will become homeless in the next 72 hours? G

2. Are you currently residing with, or trying to leave an intimate partner, family member, caregiver or other person in your home who threatens... G

Don't forget to click "Save & Exit"

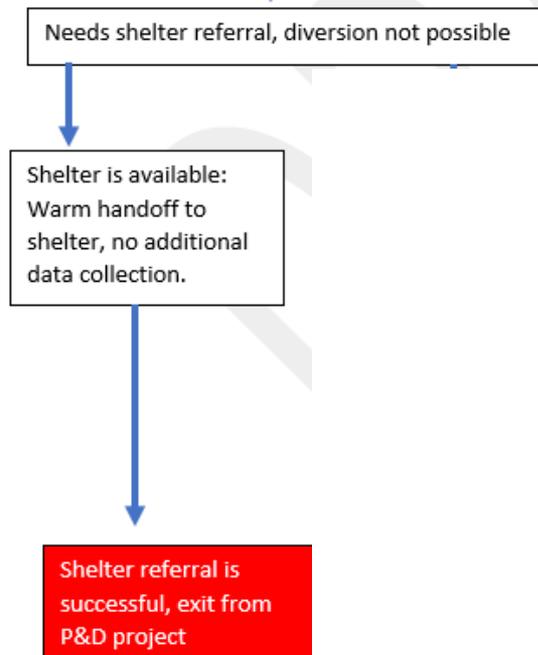
The image shows a screenshot of a software interface. At the top, there are several tabs, with "FUNCTIONS" being the active one. Below the tabs is a form area. The form has a section titled "Information" which is highlighted with a green horizontal bar. Below this section, there is a field labeled "End Date". Below the "Information" section is another section titled "Contact Information". At the bottom right of the form, there are three buttons: "Save", "Save & Exit", and "Exit". The "Save & Exit" button is highlighted with a blue rectangular border.

HOMELESSNESS	FUNCTIONS			
Information				
End Date				
Contact Information				
Save	Save & Exit	Exit		



**NEXT STEPS DEPEND ON
RESULTS OF THE P&D SCREEN**

Diversion NOT Possible



If diversion is not possible, person/household needs shelter and shelter is available do a warm handoff to shelter.

Add service transaction for P&D screen and complete exit from P&D project.

Add Service for P&D Screen

Client Information

Service Transactions

Edit Service

▼ Household Members

This Client is not a member of any Households.

Service Provider *  NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Creating User Nicole Purdy

Start Date * 09 / 18 / 2018    4 ▼ : 30 ▼ : 52 ▼ PM ▼

End Date 09 / 18 / 2018    4 ▼ : 31 ▼ : 23 ▼ PM ▼

Service Type *  Homeless Diversion Programs (BH-0500.3100)

Provider Specific Service

Service Notes

Complete Limited Exit from P&D Project

Client - (173) Marie, Bobby Brown



(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019



Client Information

Service Transactions

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

Exiting clients in ClientPoint

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD	 09/18/2018				 

Add Entry / Exit

Showing 1-1 of 1

Click the pencil located under Exit Date to exit the client

Enter Limited Exit Data

Include appropriate household members

Confirm Exit Date →

Enter Exit Destination →

Edit Exit Data - (173) Marie, Bobby Brown

Edit Exit Data - (173) Marie, Bobby Brown

Exit Date *	<input type="text" value="09"/> / <input type="text" value="18"/> / <input type="text" value="2018"/>    <input type="text" value="4"/> : <input type="text" value="51"/> : <input type="text" value="59"/> <input type="text" value="PM"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

↓

Complete the Housing Assessment at Exit

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼

Type * HUD ▼

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
 	(173) Marie, Bobby Brown		 09/18/2018	 09/18/2018				Emergency shelter, including hotel or motel paid for with emergency shelter voucher (HUD)	

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Exit Assessment

Household Members

(173) Marie, Bobby Brown
Age: 35
Veteran: No (HUD)



NC HMIS Exit

Exit Date: 09/18/2018 04:51:59 PM 

Answer Following 3 Questions For Prevention Projects Only

Housing Assessment at Exit	-Select- ▼
If Able to maintain housing at entry, Subsidy Information	-Select- ▼ G
If Moved to new housing unit, Subsidy information	-Select- ▼ G

Complete the Housing Assessment Disposition

Non-Cash Benefits HUD Verification 

Source of Non-Cash Benefit *	Start Date *	End Date	Amount of Non-Cash Benefit	Receiving Benefit?
<input type="button" value="Add"/>				

Housing Assessment Disposition (Coordinated Assessment)

If Other Housing Assessment Disposition, specify (Coordinated Assessment)

Contact Information

Start Date *	Staying on street, ES, or SH	Start Date *	End Date	Notes
<input type="button" value="Add"/>				

Outreach

Date of Contact	Start Date *	End Date	Notes
<input type="button" value="Add"/>			

Disposition Dropdown:

- Select-
- Select-
- Referred to emergency shelter/safe haven
- Referred to transitional housing
- Referred to rapid re-housing
- Referred to permanent supportive housing
- Referred to homelessness prevention
- Referred to street outreach
- Referred to other continuum project type
- Referred to a homelessness diversion program
- Unable to refer/accept within continuum; ineligible for continuum projects
- Unable to refer/accept within continuum; continuum services unavailable
- Referred to other community project (non-continuum)
- Applicant declined referral/acceptance
- Applicant terminated assessment prior to completion
- Other/specify

Diversion NOT Possible

Needs shelter referral, diversion not possible

Shelter not available.
Do full entry into P&D,
work on plan for
shelter/self-resolution

If diversion is not possible, person/household needs shelter and shelter is **NOT** available do a full entry into P&D project.

Add service transaction for P&D screen and continue to work on plan for shelter

Select full assessment in Entry Edit

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019



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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD	09/18/2018				

Add Entry / Exit

Showing 1-1 of 1



Select Assessment

Entry Assessment

Select an Assessment

 NC HMIS Update

 NC HMIS Exit

 NC HMIS CoC Intake (3.917B)
 NCCEH Prevention and Diversion screen

Household Members

 (173) Marie, Bobby Brown
 Age: 35
 Veteran: No (HUD)

NC HMIS CoC Intake (3.917B)

Entry Date: 08/15/2018 11:09:32 AM

General Demographic Information:

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

Relationship to Head of Household	-Select-	G
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> G	
Date of Birth Type	-Select-	G
Gender	-Select-	G
Primary Race	-Select-	G
Secondary Race	-Select-	G
Ethnicity	-Select-	G

Health and Disability Information:

Does the client have a disabling condition?	-Select-	G
---	----------	---

Disabilities

[HUD Verification](#)

Disability Type *	Disability determination *	Start Date *	End Date
<input type="button" value="Add"/>			

Covered by Health Insurance	-Select-	G
-----------------------------	----------	---

Health Insurance

[HUD Verification](#)

Start Date *	Health Insurance Type	Covered?	(HOPWA) If Private Pay Insurance, Specify	(HOPWA) If No, Reason not covered	End Date
--------------	-----------------------	----------	---	-----------------------------------	----------

Complete Entry Assessment UDEs

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼

Type* HUD ▼

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
 	(173) Marie, Bobby Brown		 09/18/2018						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Select an Assessment

Yes

NC HMIS Update

NC HMIS Exit

NC HMIS CoC Intake (3.917B)

NCCEH Prevention and Diversion screen

Household Members

(173) Marie, Bobby Brown
Age: 35
Veteran: No (HUD)

NC HMIS CoC Intake (3.917B)

Entry Date: 09/18/2018 01:08:42 PM 

General Demographic Information:

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

Relationship to Head of Household	-Select- ▼ G
Date of Birth	□ / □ / □    G
Date of Birth Type	-Select- ▼ G
Gender	-Select- ▼ G
Primary Race	-Select- ▼ G
Secondary Race	-Select- ▼ G



Don't forget other Household Members

Don't forget to click "Save & Exit"

The image shows a screenshot of a software interface. At the top, there are several tabs, with "FUNCTIONS" being the active one. Below the tabs is a form area. The form has a section titled "Information" which contains a field labeled "End Date". Below this is a section titled "Contact Information". At the bottom right of the form, there are three buttons: "Save", "Save & Exit", and "Exit". The "Save & Exit" button is highlighted with a blue border.

HOMELESSNESS	FUNCTIONS			
Information				
End Date				
Contact Information				
Save	Save & Exit	Exit		

Add Service for P&D Screen

Client Information

Service Transactions

Edit Service

▼ Household Members

This Client is not a member of any Households.

Service Provider *  NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Creating User Nicole Purdy

Start Date * 09 / 18 / 2018    4 ▼ : 30 ▼ : 52 ▼ PM ▼

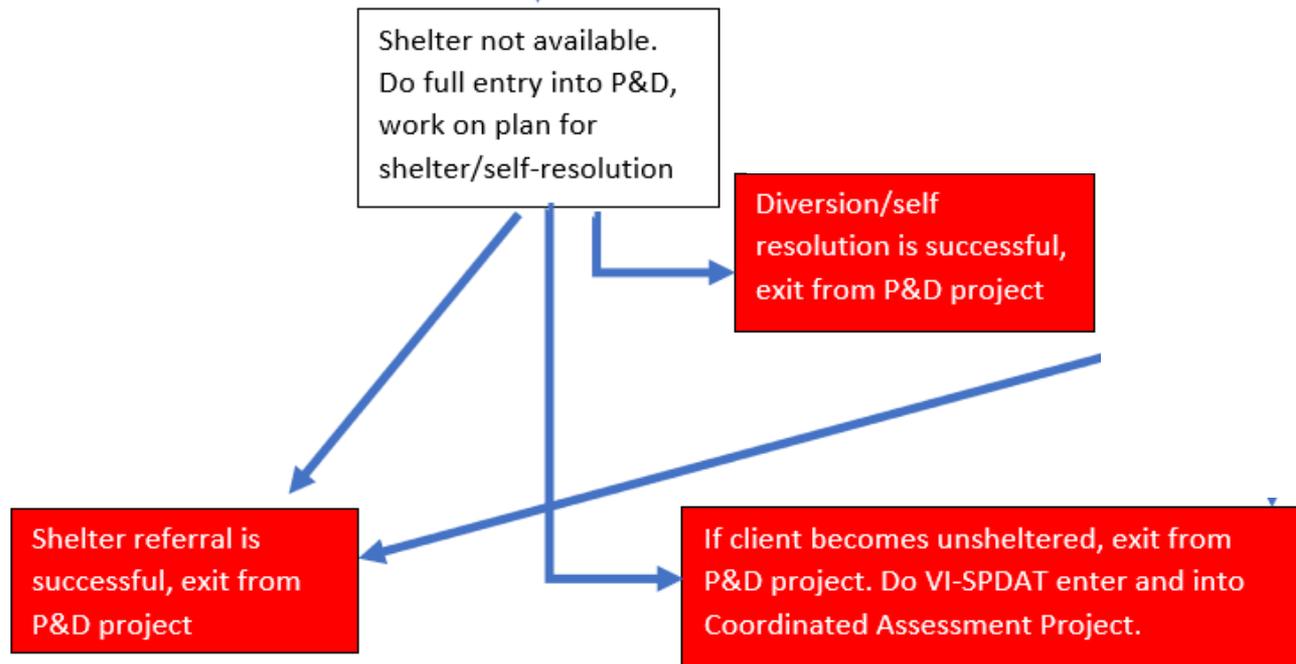
End Date 09 / 18 / 2018    4 ▼ : 31 ▼ : 23 ▼ PM ▼

Service Type *  Homeless Diversion Programs (BH-0500.3100)

Provider Specific Service

Service Notes

Diversion NOT Possible Outcomes



-If shelter is found or they self-resolve do full exit from P&D project

-If they become unsheltered do full exit from P&D project, enter into CA project and complete VI-SPDAT

Complete Full Exit from P&D Project

Client - (173) Marie, Bobby Brown



(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019



Client Information

Service Transactions

Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Assessments
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Exiting clients in ClientPoint

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD	 09/18/2018				 

Add Entry / Exit

Showing 1-1 of 1

Click the pencil located under Exit Date to exit the client

Enter Full Exit Data

Include appropriate household members

Confirm Exit Date →

Enter Exit Destination →

Edit Exit Data - (173) Marie, Bobby Brown

Edit Exit Data - (173) Marie, Bobby Brown

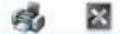
Exit Date *	<input type="text" value="09"/> / <input type="text" value="18"/> / <input type="text" value="2018"/>    <input type="text" value="4"/> : <input type="text" value="51"/> : <input type="text" value="59"/> <input type="text" value="PM"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

↓

Save & Continue Cancel

Complete the whole Exit Assessment

Entry/Exit Data



Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider *	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Type *	HUD			
<input type="button" value="Update"/>				

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(9) Lacks, Henrietta	Yes	10/17/2016	10/27/2016			Completed program	Owned by client, with ongoing housing subsidy (HUD)	
	(12) Lacks, Harry	No	10/17/2016	10/27/2016			Completed program	Owned by client, with ongoing housing subsidy (HUD)	

Showing 1-2 of 2

Entry Assessment

Exit Assessment

Household Members

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



NC HMIS Exit

Exit Date: 10/27/2016 09:34:53 PM

Housing Assessment at Exit

If Able to maintain housing at entry, Subsidy Information

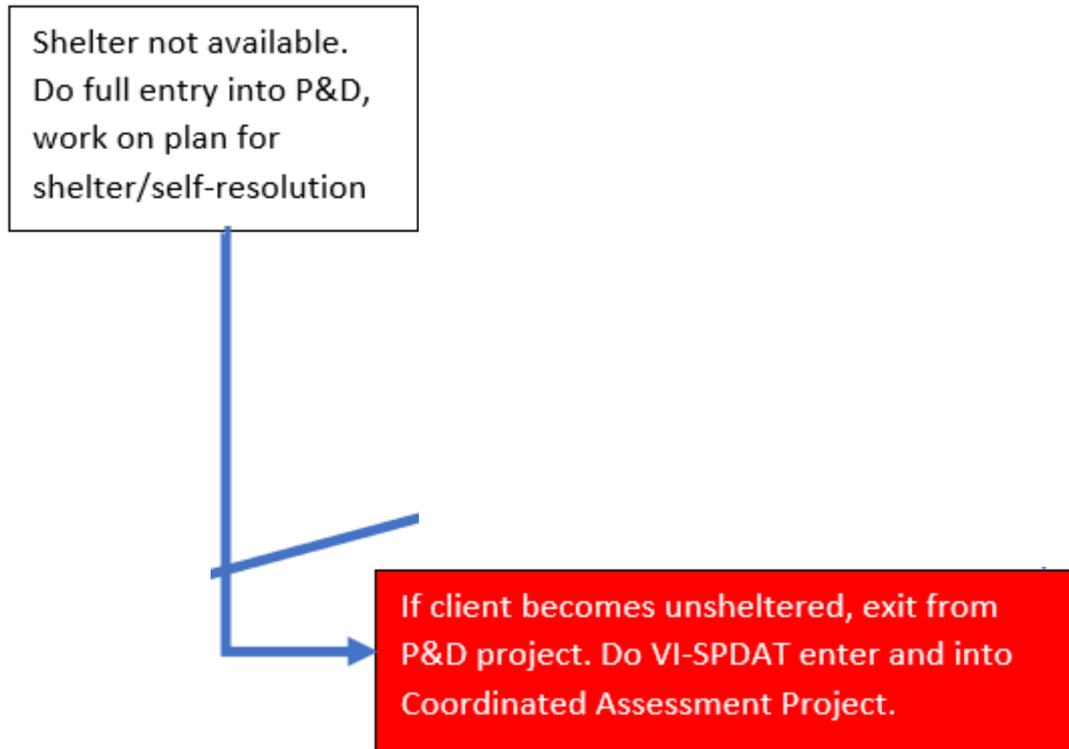
If Moved to new housing unit, Subsidy information

Don't forget other Household Members

Don't forget to click "Save & Exit"

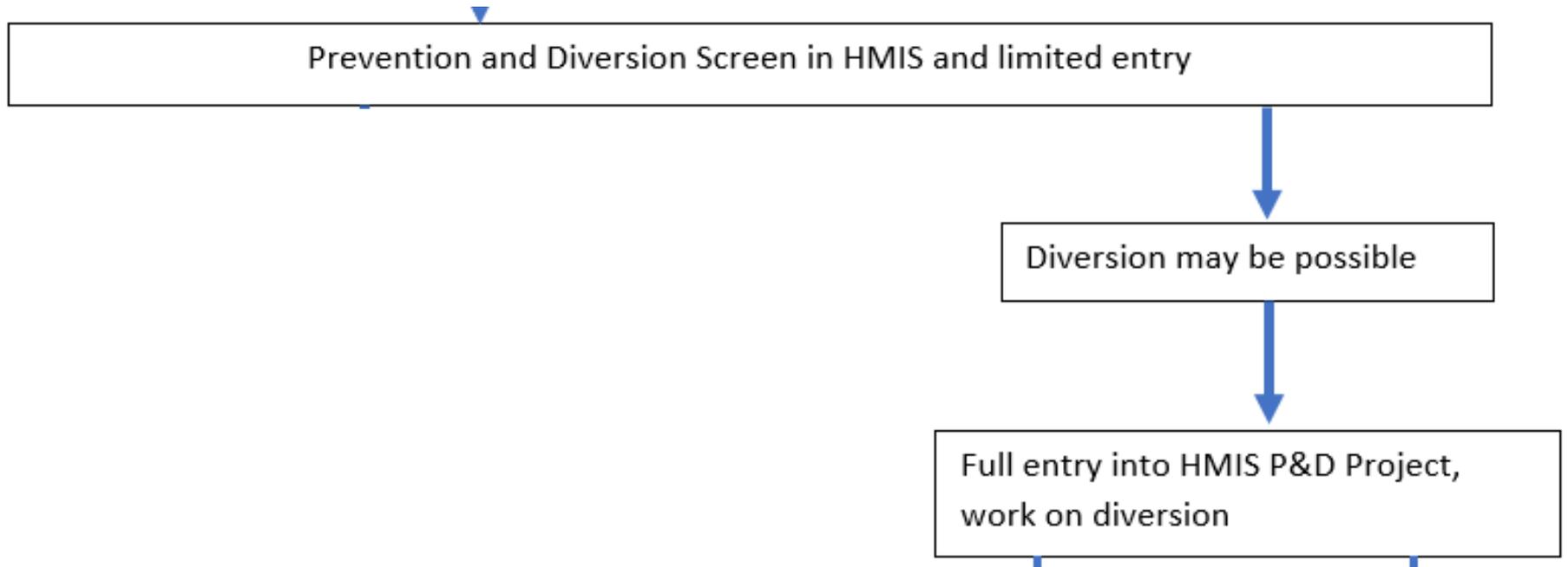
The image shows a screenshot of a software interface. At the top, there are several tabs, with "FUNCTIONS" being the active one. Below the tabs is a form area. The form has a section titled "Information" which is highlighted with a green horizontal bar. Below this section, there is a field labeled "End Date". Below the "Information" section is another section titled "Contact Information". At the bottom right of the form, there are three buttons: "Save", "Save & Exit", and "Exit". The "Save & Exit" button is highlighted with a blue border.

HOMELESSNESS	FUNCTIONS			
Information				
End Date				
Contact Information				
Save	Save & Exit	Exit		



If unsheltered switch to Coordinated
Assessment Project workflow

Diversion may be Possible



If diversion is possible, do a full entry into P&D project, add service transactions for P&D screen and prevention services and conduct mediation, secure resources etc to divert

Select full assessment in Entry Edit

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019



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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD	09/18/2018				

Add Entry / Exit

Showing 1-1 of 1



Complete Entry Assessment UDEs

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* NC Balance of State - Region 7 SSO Prevention and Diversion (7466) ▼

Type* HUD ▼

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
 	(173) Marie, Bobby Brown		 09/18/2018						

Include Additional Household Members

Showing 1-1 of 1

Entry Assessment

Select an Assessment

NC HMIS Update

NC HMIS Exit

NC HMIS CoC Intake (3.917B)

NCCEH Prevention and Diversion screen

Household Members

(173) Marie, Bobby Brown
Age: 35
Veteran: No (HUD)

NC HMIS CoC Intake (3.917B)

Entry Date: 09/18/2018 01:08:42 PM 

General Demographic Information:

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

Relationship to Head of Household	-Select- ▼ G
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
Date of Birth Type	-Select- ▼ G
Gender	-Select- ▼ G
Primary Race	-Select- ▼ G
Secondary Race	-Select- ▼ G



Don't forget other Household Members

Add Service for P&D Screen & Diversion

Household Members

Add household members if needed

This Client is not a member of any Households.

Multiple Services



Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider* NC Balance of State - Region 7 SSO Prevention and Diversion (7466)

Auto-populates to your EDA mode

Start Date* 09 / 18 / 2018 5 : 46 : 54 PM

End Date 09 / 18 / 2018 5 : 46 : 54 PM

Service List

Number of Services 1 Need Status Identified Set All

Number of Services* 1

Service Type Homeless Diversion Programs (BH-0500.3100)

Need Information

Need Status* Identified

Remove Clear

Number of Services* 1

Service Type Homelessness Prevention Programs (BH-0500.3140)

Need Information

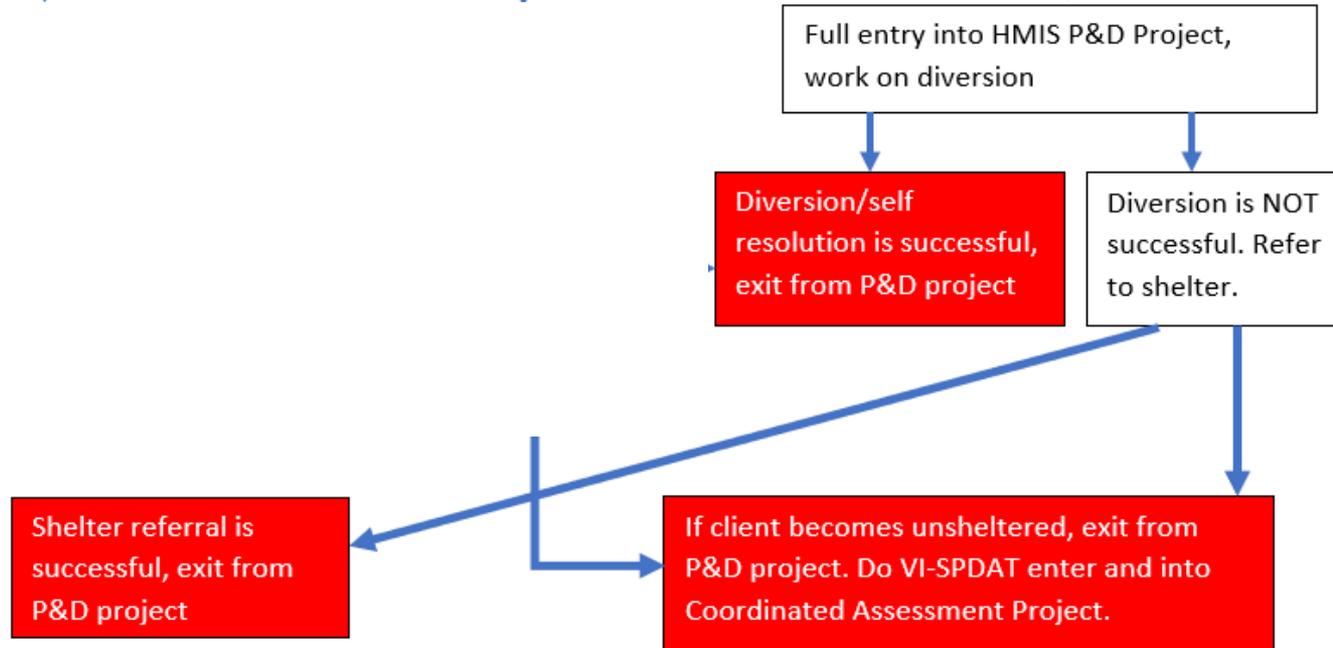
Need Status* Identified

Remove Clear

Add Another Remove All Clear All

Save & Exit Cancel

Diversion Outcomes



- If diversion is successful do full exit from P&D project
- If diversion fails, refer to shelter, do warm handoff to shelter or continue to work on shelter and/or self-resolution until sheltered. Then do full exit from P&D project
- If all diversion and shelter efforts fail and they become unsheltered do full exit from P&D project, enter into CA project and complete VI-SPDAT and continue to work with clients for shelter/housing.

Complete Full Exit from P&D Project

Client - (173) Marie, Bobby Brown

(173) Marie, Bobby Brown

Release of Information: Ends 09/18/2019

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	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 NC Balance of State - Region 7 SSO Prevention and Diversion (7466)	HUD	 09/18/2018				 

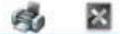
Add Entry / Exit

Showing 1-1 of 1

Click the pencil located under Exit Date to exit the client

Complete the whole Exit Assessment

Entry/Exit Data



Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider *	Heading Home Housing - Rowan County - Rapid Re-Housing (7075)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Type *	HUD			
<input type="button" value="Update"/>				

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(9) Lacks, Henrietta	Yes	10/17/2016	10/27/2016			Completed program	Owned by client, with ongoing housing subsidy (HUD)	
	(12) Lacks, Harry	No	10/17/2016	10/27/2016			Completed program	Owned by client, with ongoing housing subsidy (HUD)	

Showing 1-2 of 2

Entry Assessment

Exit Assessment

Household Members

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



NC HMIS Exit

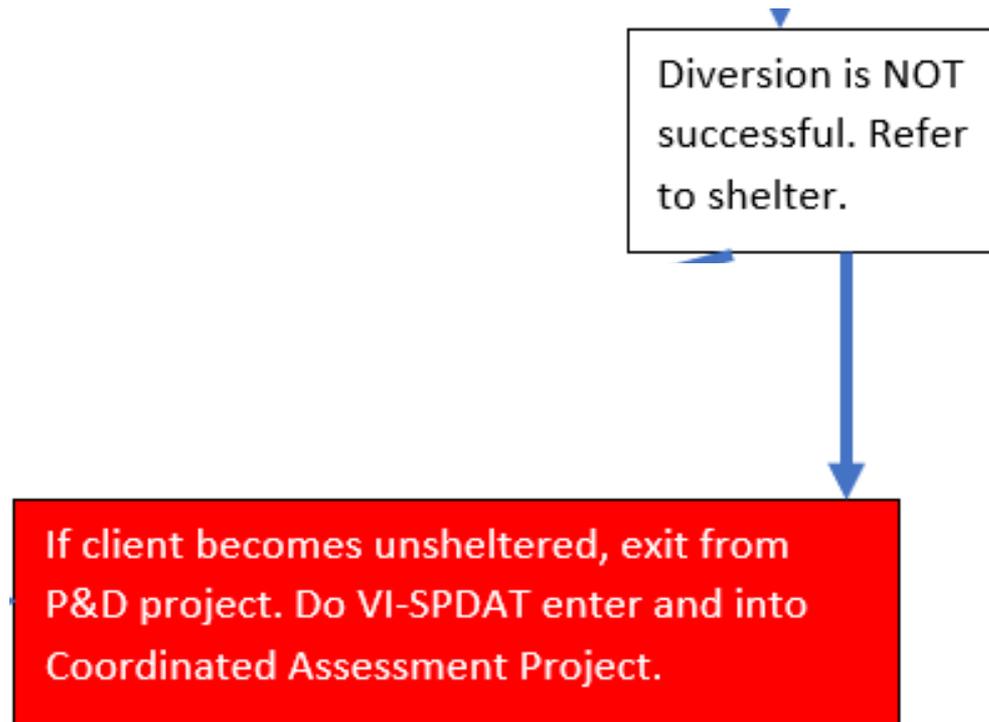
Exit Date: 10/27/2016 09:34:53 PM

Housing Assessment at Exit

If Able to maintain housing at entry, Subsidy Information

If Moved to new housing unit, Subsidy information

Don't forget other Household Members



If unsheltered switch to Coordinated Assessment Project workflow



SERVING SURVIVORS OF DV

New DV ROI

- Client's choice what to share
- Safety planning for CE should happen before DV shelter refers to CE
- DV shelters refer to CE with electronic or paper BNL spreadsheet



RESOURCES

More HUD Guidance

- Training is NOT (unfortunately) eligible for SSO reimbursement.
- It IS eligible as match (it's eligible under Admin, which is not in our budget)
- Assessment of eligibility IS eligible, even if you do it a lot (i.e. act as an access point and a lot of ineligible people call you)
 - HUD plans to provide more guidance about what to do when you refer that ineligible person somewhere else

Other eligible cost questions?

Reimbursement form questions?

- Remember, first reimbursement requests are due November 30.

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