

# HMIS Users Meeting

December 2021



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

# Agenda

December 2021

## System Updates

- Moving On Assistance
- ART planned downtime
- Federal Reporting Season
  - Client Level Corrections
  - Check-Ins

## How Can We Help?

- Emergency Housing Vouchers
- NCCEH Website Review
- New Report: Unsheltered Contact Information

## What's Next

- Winter Beds
- LMS Launch!
- HMIS Calendar

## Demo/Troubleshooting



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# System Updates

# PSH Projects Only: Moving On data moved!

- Go to [ncceh.org/hmis/training](https://ncceh.org/hmis/training) for a review of how to record Service Transactions



# PSH Projects Only: Moving On data moved!



## C2 – Moving On Assistance Provided – CoC Funded

Record for head of household only. Record at Occurrence Point each time the service is provided.

Type of CoC Funded Service Provided	Service Description	Service Code
Subsidized housing application assistance	Benefits Assistance	FT-1000
Financial Assistance for Moving On (e.g., security deposit, moving expenses)	Rental Deposit Assistance	BH-3800-7250
	Moving Assistance	BH-5000 and related
Non-financial assistance for Moving On (e.g., housing navigation, transition support)	Housing Search and Information	BH-3900 and related
	Case/Care Management	PH-1000
Housing referral/placement	Supportive Housing Placement/Referral	BH-8500 and related
Other (please specify)	Varies	Varies

Use the Service that best fits (in this order 1-4)



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- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ▶ Reports
- ▶ Admin
- Logout

### Client - (4) Solo, Han



(4) Solo, Han

Release of Information: **None**

-Switch to Another Household Member- ▾

Submit

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



## Client - (4) Solo, Han



(4) Solo, Han

Release of Information: **None**

-Switch to Another Household Member- ▾

Submit

### Client Information

### Service Transactions

#### Add Service

##### ▼ Household Members



To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

- (125413) Single Parent
  - (4) Solo, Han (Primary Client)
  - (501224) Solo, Ben

**Service Provider \***

Partners BHM - Multiple BoS Counties - PSH - HUD (5061) ▾

Creating User

Andrea Carey

**Start Date \***

12 / 02 / 2021 9 ▾ : 30 ▾ : 55 ▾ AM ▾

End Date

12 / 02 / 2021 9 ▾ : 34 ▾ : 50 ▾ AM ▾

**Service Type \***

Rental Deposit Assistance (BH-3800.7250) ▾

Look Up

Provider Specific Service









-Select- ▾

Save & Continue

Cancel











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<b>Service Provider *</b>	 Partners BHM - Multiple BoS Counties - PSH - HUD (5061)
Creating User	Andrea Carey
<b>Start Date *</b>	12 / 02 / 2021    9 ▾ : 30 ▾ : 55 ▾ AM ▾
End Date	12 / 02 / 2021    9 ▾ : 34 ▾ : 50 ▾ AM ▾
<b>Service Type *</b>	 Rental Deposit Assistance (BH-3800.7250)
Provider Specific Service	-Select- ▾
Service Notes	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>

Moving On Assistance	-Select- ▾
<b>Service Costs</b>	-Select-
Number of Units	Subsidized housing application assistance
Unit Type	Financial assistance for Moving On (e.g., security deposit, moving expenses)
Cost per Unit	Non-financial assistance for Moving On (e.g., housing navigation, transition support)
Total Cost of Units	Housing referral/placement
	Other (please specify)





<b>Service Provider *</b>	 Partners BHM - Multiple BoS Counties - PSH - HUD (5061)
Creating User	Andrea Carey
<b>Start Date *</b>	12 / 02 / 2021    9 : 30 : 55 AM
End Date	12 / 02 / 2021    9 : 34 : 50 AM
<b>Service Type *</b>	 Rental Deposit Assistance (BH-3800.7250)
Provider Specific Service	-Select- v
Service Notes	<div style="border: 1px solid #ccc; height: 150px;"></div>



Make sure these correspond

<b>Moving On Assistance</b>	Financial assistance for Moving On (e.g., security deposit, moving expenses) v
-----------------------------	--



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



# PSH Projects Only: Moving On data moved!



## C2 – Moving On Assistance Provided – CoC Funded

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	Case/Care Management	PH-1000
Housing referral/placement	Supportive Housing Placement/Referral	BH-8500 and related
Other (please specify)	Varies	Varies



Skip!



**Service Costs**

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

▶ **Apply Funds for Service**







**Conditional Commitments**

Responsible Party ▲	Condition
<input type="button" value="Add Conditional Commitment"/> <input type="button" value="Print Commitment Letter"/> <b>No matches.</b>	

**Support Documentation**

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

**Follow Up Information**

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	Partners BHM - Multiple BoS Counties - PSH - HUD (5061) ▾ -Select- ▾
Follow Up Made	-Select- ▾
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   



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# Save & Exit

## Need Information

<b>Need Status*</b>	Closed ▾
Outcome of Need	Fully Met ▾
If Need is Not Met, Reason	-Select- ▾

Save

Save & Exit

Exit



# ART Upgrade

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

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

### Bring powerful new analytics to your agency

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

### Simplify user adoption with a familiar solution

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

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

WellSky will migrate existing public reports into BusinessObjects 4.3 so you will not have to

recreate them. All folder structures remain intact, keeping your reports organized as you have intended. BusinessObjects 4.3 will also continue to enforce Community Services' data visibility and security rules.

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

### Use almost any modern browser

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

### No additional cost to you!

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

### Do more with your data

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

## Timeline Information

### When will the current version of ART no longer be available?

The release plan for BusinessObjects 4.3 is currently scheduled for full deployment to all sites on or around February 1, 2022. At the time of the upgrade, the current version of BusinessObjects 3.1 will no longer be accessible.





# HUD Reporting Season

LSA – Longitudinal System Analysis

AHAR – Annual Homelessness  
Assessment Report

SPM – System Performance Measures

HIC – Housing Inventory Count

PIT – Point in Time Count



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# HUD Report Corrections FAQs

## Deadline

- Errors sent beginning October 4<sup>th</sup>
- Corrections/reviews due November 12<sup>th</sup>

## What are expectations for agencies?

- Review the list of client issues and correct if you have accurate info
- Corrections shared by HMIS Users
- Communication from Agency Admins for ongoing progress each week

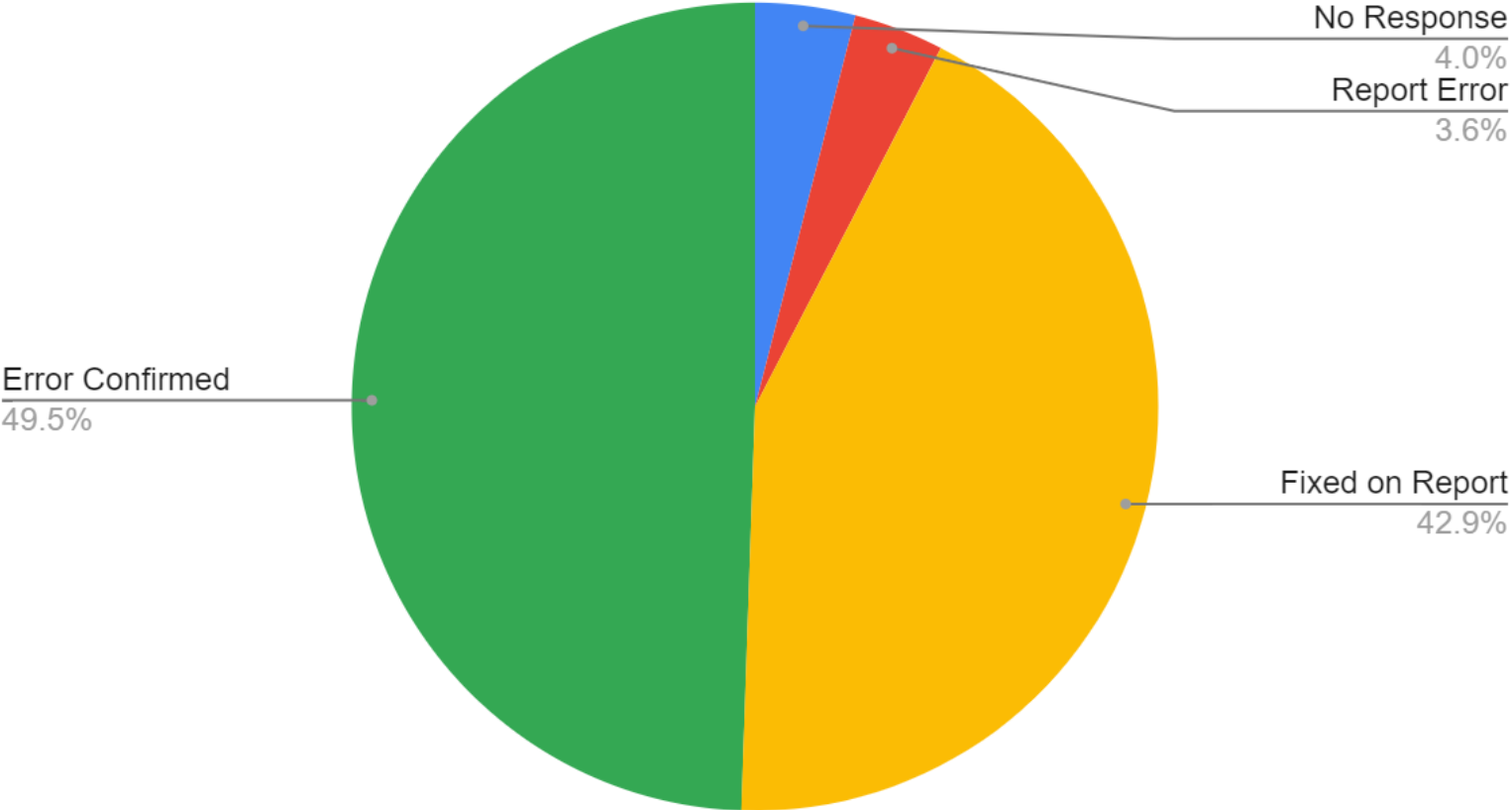
## What are the possible responses to a list of corrections?

- It's corrected! (yay!)
- I cannot correct it. (confirmed)
- It looks correct when I look at this. (potential report issue)



# Summary of Client Corrections

Current Count



Status	Orange's Count
No Response	30
Report Error	27
Fixed on Report	321
Error Confirmed	370



# Agency HMIS Check-Ins

## Agency Checklist

Agency leadership is responsible for completing and returning to the Data Center

Agency Name: \_\_\_\_\_

### HMIS Data Quality

- Yes  No Agency runs the APR or CAPER on a regular basis to verify the data and correct errors as appropriate.
- Yes  No Agency runs other reports on a regular basis to verify their data and correct errors as appropriate.
- Yes  No Agency is aware of the CoC's HMIS benchmarks, as part of the developing Data Quality Plan.
- Yes  No Agency has developed and follows a self-monitoring plan\* to ensure quality of data in HMIS.

*\*A comprehensive HMIS Data Self-Monitoring Plan should include the following components: Identifies specific reports to be used for each project; defines the reporting date range to use and the frequency at which reports are reviewed; names those responsible for running reports, data cleanup needed and verifying cleanup was done; and establishes a timeframe to complete this process.*

### HMIS User and Project Set-Up

- Yes  No Agency has reviewed the list of users and confirms all users are still active.
- Yes  No Agency has reviewed the list of users and confirms all users have accurate Enter Data As rights.
- Yes  No Agency has reviewed the list of projects and confirms all projects are ACTIVE.
- Yes  No Agency has reviewed the list of projects and confirms all projects have CURRENT funding details.
- Yes  No Agency has reviewed the list of projects and confirms all residential projects have accurate addresses.
- Yes  No Agency has reviewed the list of projects and confirms all residential projects have accurate bed lists.

Corrections or Additional Notes:

Agencies will need to confirm:

- Review individual correction questions (if needed)
- Review HMIS Users and Roles
- Review Funding Sources and Projects
- Review Bed and Unit Inventory

Required for HMIS participating agencies with (SO, ES, TH, RRH, or PSH)

- Watch out for an email to schedule
- Will take place between November and January



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**How Can We Help?**






# Emergency Housing Vouchers Exits

Exiting households to EHV when household is leased-up

- Step one: under Exit data > Destination > Rental by client, with HCV voucher (tenant or project based) (HUD)

**Edit Exit Data - (4) Solo, Han**

<b>Exit Date *</b>	08 / 11 / 2021    3 <input type="text"/> : 48 <input type="text"/> : 21 <input type="text"/> PM <input type="text"/>
Reason for Leaving	Completed program <input type="text"/>
If "Other", Specify	<input type="text"/>
<b>Destination *</b>	Rental by client, with HCV voucher (tenant or project based) (HUD) <input type="text"/>
If "Other", Specify	<input type="text"/>







# Emergency Housing Vouchers Exits

Exiting households to EHV when household is leased-up

- Step two: under Exist Assessment>CE event > EHV & Project

### Coordinated Entry Event



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Date of Event *	<input type="text" value="08"/> / <input type="text" value="11"/> / <input type="text" value="2021"/>    
Event *	<input type="text" value="Referral to Emergency Housing Voucher (EHV)"/>  


**If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:**

Location of Crisis Housing or Permanent Housing Referral	<input type="text" value="Bladenboro Housing Autho"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/> 
--	---

**If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:**

Referral Result	<input type="text" value="Successful referral: client accepted"/>  
-----------------	---

**If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:**

Date of Result	<input type="text" value="08"/> / <input type="text" value="11"/> / <input type="text" value="2021"/>    
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# Emergency Housing Vouchers Exits

**PSH Projects may offer aftercare for up to 6 months after exit**

In HMIS, aftercare without financial assistance is not considered part of PSH enrollment

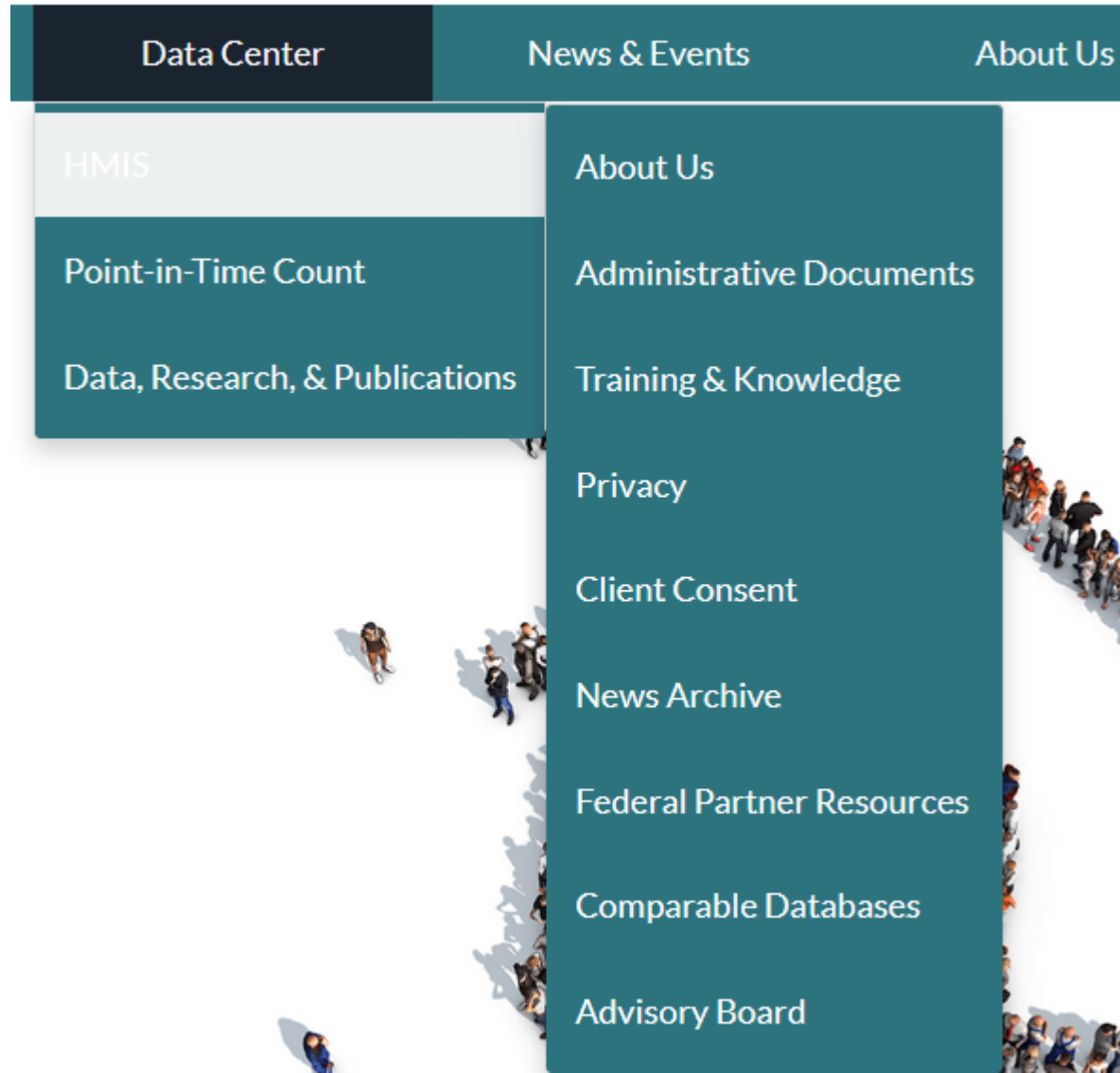
Once financial assistance ends:

1. Exit the client in HMIS
2. Record the CE Event for Referral to EHV in HMIS
3. Record client services for up to 6 months in client file

*Reach out to  
Helpdesk to plan  
your data!*



# NCCEH Website Review



## *Highlights*

- Administrative
- Training & Knowledge
- Client Consent
- News Archive

# New Report: Unsheltered Contact Information

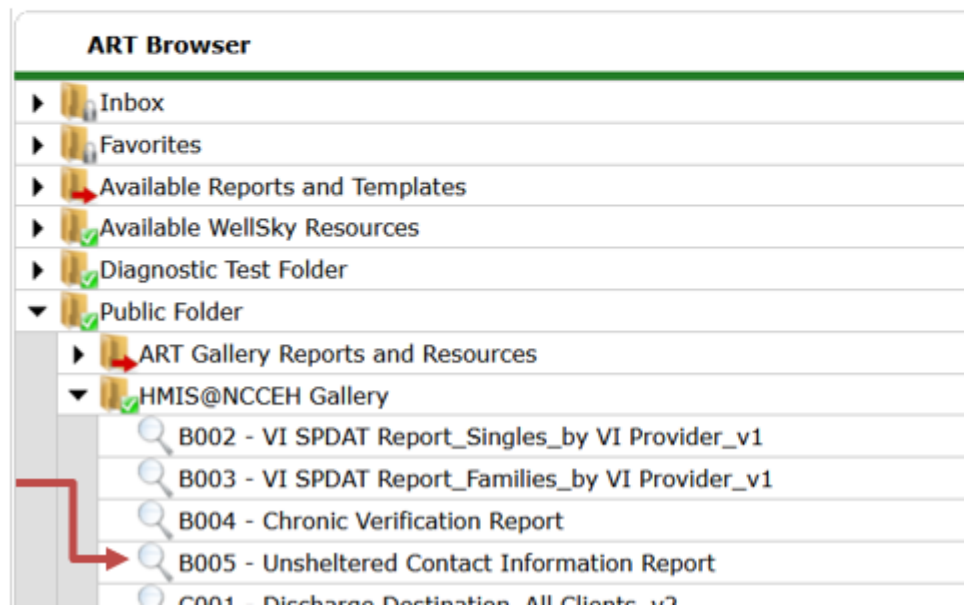
- B005 – Unsheltered Contact Information Report

## Unsheltered Client Contact Information Details Report Guide

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*Summary:* This report includes client level contact information details on clients with a recent Living Situation of Street Homeless.

*Location:* ART > Public Folders > HMIS@NCCEH Gallery > “B005 – Unsheltered Contact Information Report”

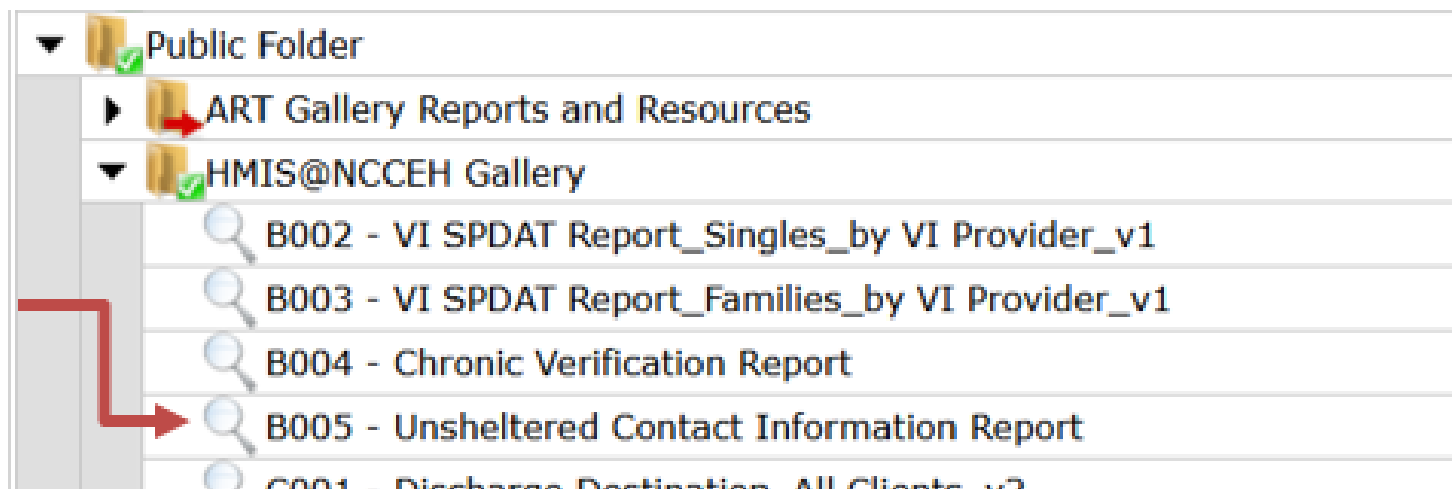




# New Report: Unsheltered Contact Information

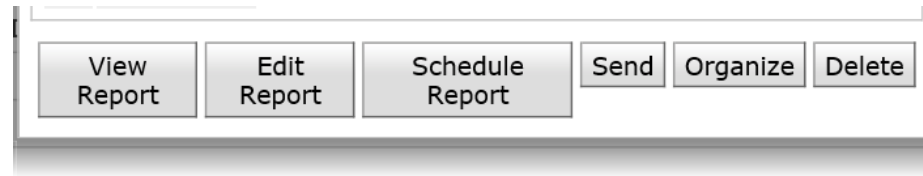
*Summary:* This report includes client level contact information details on clients with a recent Living Situation of Street Homeless.

*Location:* ART > Public Folders > HMIS@NCCEH Gallery > “B005 – Unsheltered Contact Information Report”

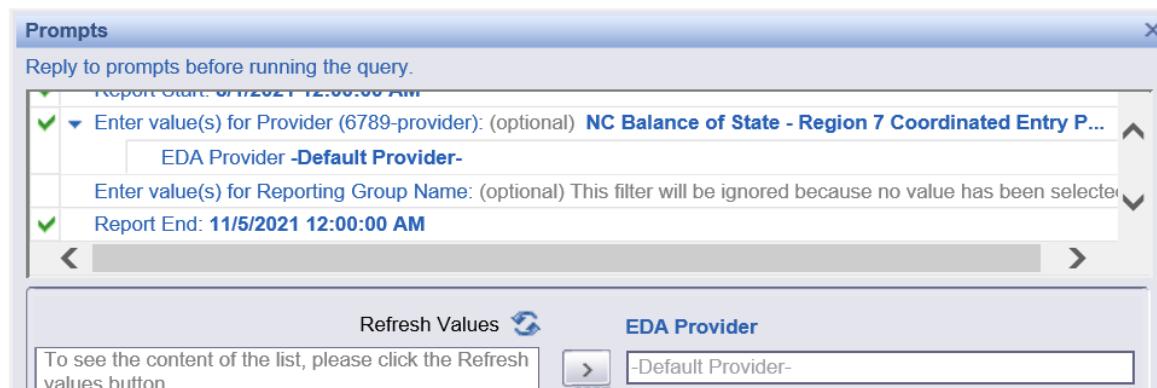


# New Report: Unsheltered Contact Information

*How to run:* Click the magnifying glass – click “View Report” or “Schedule Report”.



*Prompts:* Users will specify EDA Provider, Reporting Start Date and Reporting End Date (for Active Window) and optionally, Provider or Reporting Group Name (likely 2022 PIT Reporting Group)



# New Report: Unsheltered Contact Information

*How does this report pull data?*

- The report pulls data based on Current Living Situation updates.
- Clients must have a Current Living Situation update (CLS 4.12) with the specified Reporting Group of projects in the prompt to be included on the report.
- The report filters this data for Head of Household = Self and Most recent CLS = Unsheltered and then returns contact information for those clients only.



# New Report: Unsheltered Contact Information



*What's the format?*

The **Alpha Contacts Tab** includes the detailed contact information for valid clients only. The criteria for inclusion are Head of Household = Self and Most recent CLS = Unsheltered. There is a client count footer on the bottom of the table.

The **Additional Details Tabs** are for Report Troubleshooting. This tab does not contain any client data, however, the full data set for the query is counted on this tab to understand total clients in the query, total clients with unsheltered CLS.

*Please note:* This report contains PII. Data extractions from HMIS must follow file storage protocol. Please password protect or otherwise secure this file.



Client ID	Last Name	First Name	Contact Info Date Added	Primary Phone Number	Secondary Phone Number	Email Address		Social Media Handle or Website
1020140	*****	*****	8/6/2021	XXX-XXX-XXXX				
1026205	*****	*****	11/19/2021	XXX-XXX-XXXX		email@email.com		
1020896	*****	*****	6/25/2021	XXX-XXX-XXXX				
1015436	*****	*****	1/29/2021	XXX-XXX-XXXX				
1015436	*****	*****	1/29/2021	XXX-XXX-XXXX				
1015436	*****	*****	10/25/2021	XXX-XXX-XXXX		email@email.com		
1017859	*****	*****	4/9/2021	XXX-XXX-XXXX				
1017859	*****	*****	6/28/2021	XXX-XXX-XXXX	XXX-XXX-XXXX	email@email.com		
1022812	*****	*****	8/12/2021	XXX-XXX-XXXX				
1022836	*****	*****	8/12/2021	XXX-XXX-XXXX				
1024549	*****	*****	9/29/2021	XXX-XXX-XXXX		email@email.com		
1024623	*****	*****	10/1/2021	XXX-XXX-XXXX		email@email.com		
1007251	*****	*****	11/8/2019	XXX-XXX-XXXX				
1007251	*****	*****	1/17/2021	XXX-XXX-XXXX		email@email.com		
1025851	*****	*****	11/10/2021	XXX-XXX-XXXX		email@email.com		
1019460	*****	*****	5/24/2021	XXX-XXX-XXXX				
1015966	*****	*****	2/11/2021	XXX-XXX-XXXX				
1015966	*****	*****	3/18/2021	XXX-XXX-XXXX		email@email.com		
1015162	*****	*****	1/21/2021	XXX-XXX-XXXX		email@email.com		



What's Next?



# Winter Beds

Are there new or changing emergency beds in your community?

How will data be collected and entered?

Does HMIS need to separate beds for outcomes?

What funding is being used?



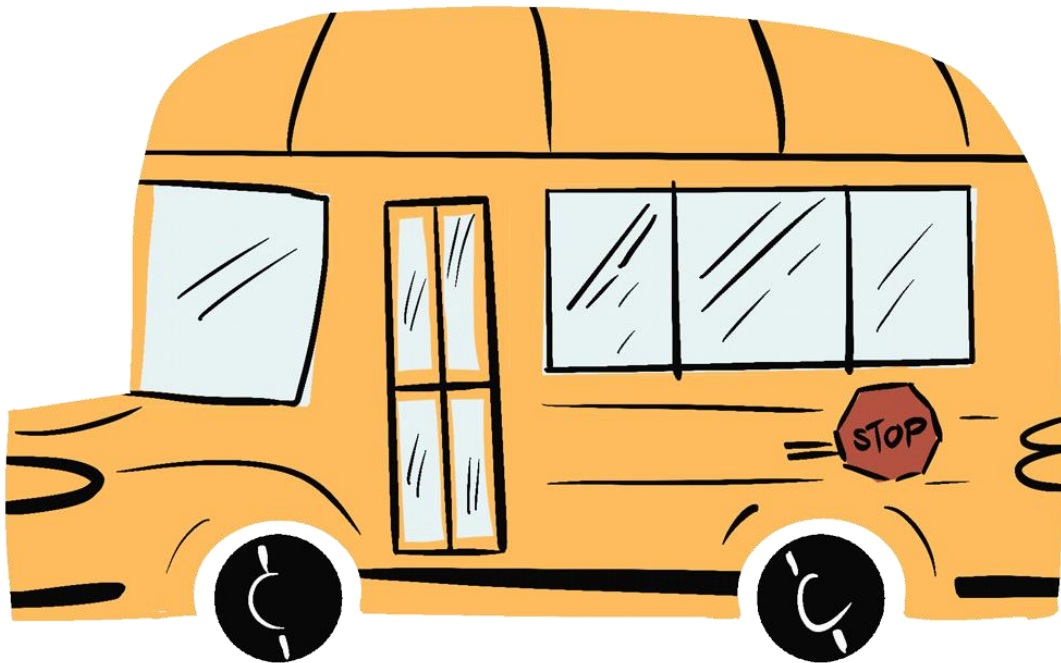
# Winter Beds

**Consider how long beds will be in operation**

- Continuously for months
- Ad hoc basis as temperatures drop
- Until pandemic is over
- Forever and always



# Learning Management System (LMS)



## New Training System is here!

- LMS developed by ICA
- Will allow better tracking for new user and annual requirements
- Will expand capacity for recorded trainings (update & create new ones)
- Will gradually transition current trainings

## First up:

- Annual Privacy Training
- New Data Standards quiz

**Deadline January 7<sup>th</sup>**



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# What's Next Calendar

Due	Report/Event Name
Nov 12 <sup>th</sup>	Deadline: Agency Corrections for HUD Reporting
November - December	Agency HMIS Check-Ins (required)
December – January 7 <sup>th</sup>	Annual Privacy and New Data Standards quizzes
Jan 3 <sup>rd</sup>	Orange CoC HMIS Users Meeting
Jan 26 <sup>th</sup>	Point in Time Night



## Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc\_end\_homelessness 

## Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



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# Questions?

Let's Troubleshoot!