HMIS@NCCEH
Orange CoC HMIS Users Meeting

August 2020

NC COALITION to end HOMELESSNESS

Agenda

August 2020

System Updates

COVID-19 Response

Zendesk message to Helpdesk

We Love Data

PIT and HIC 2020

How can we help?

Case Manager tab and Counts Reports

Case Plans and Goals

What's Next?

NCCEH

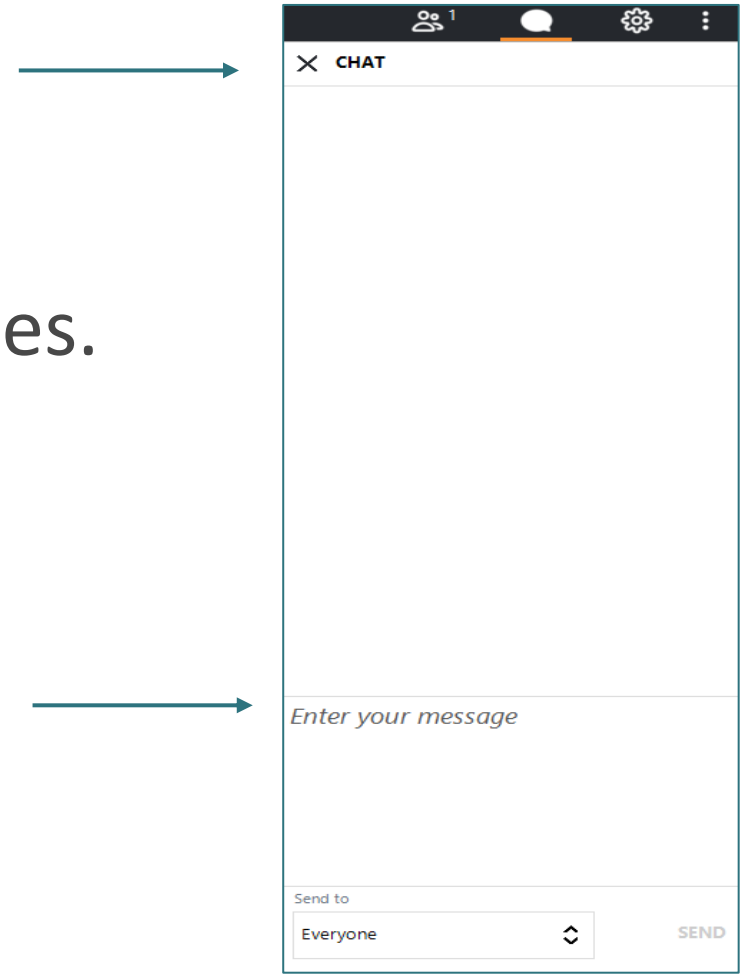
Welcome

Reminders

Your line is muted.

We will unmute the line during Q&A pauses.

The chat box is available to use anytime.



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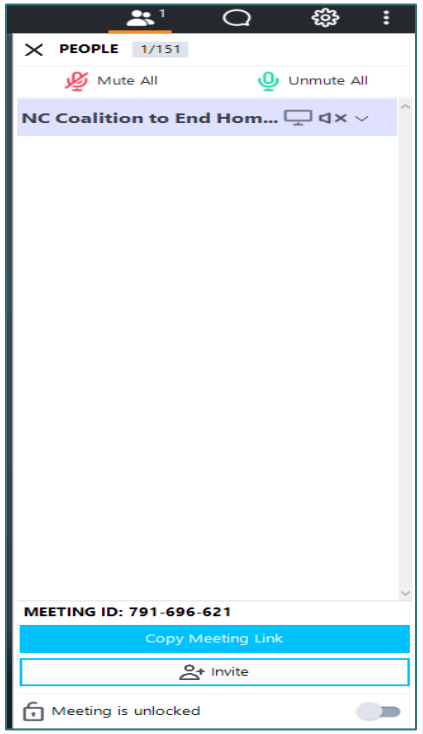
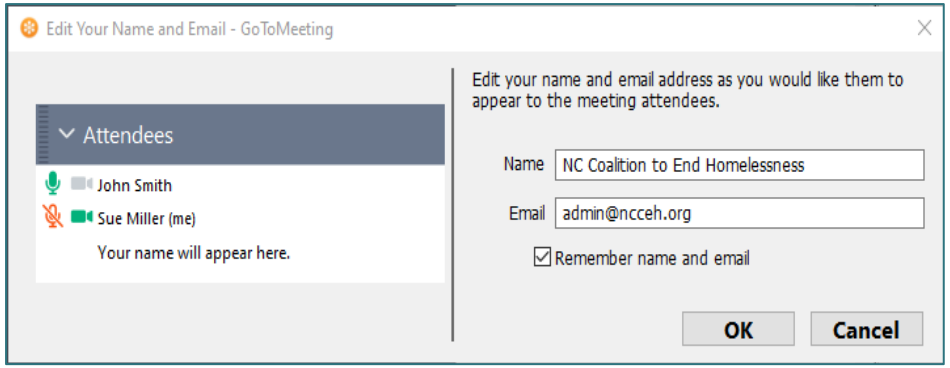
Who is here?

- Enter your full names, so we know who attended and who asks questions
- If multiple folks are watching at once, use a combo name like, “Andrea Carey and Andy Phillips – the Ands”

1



2



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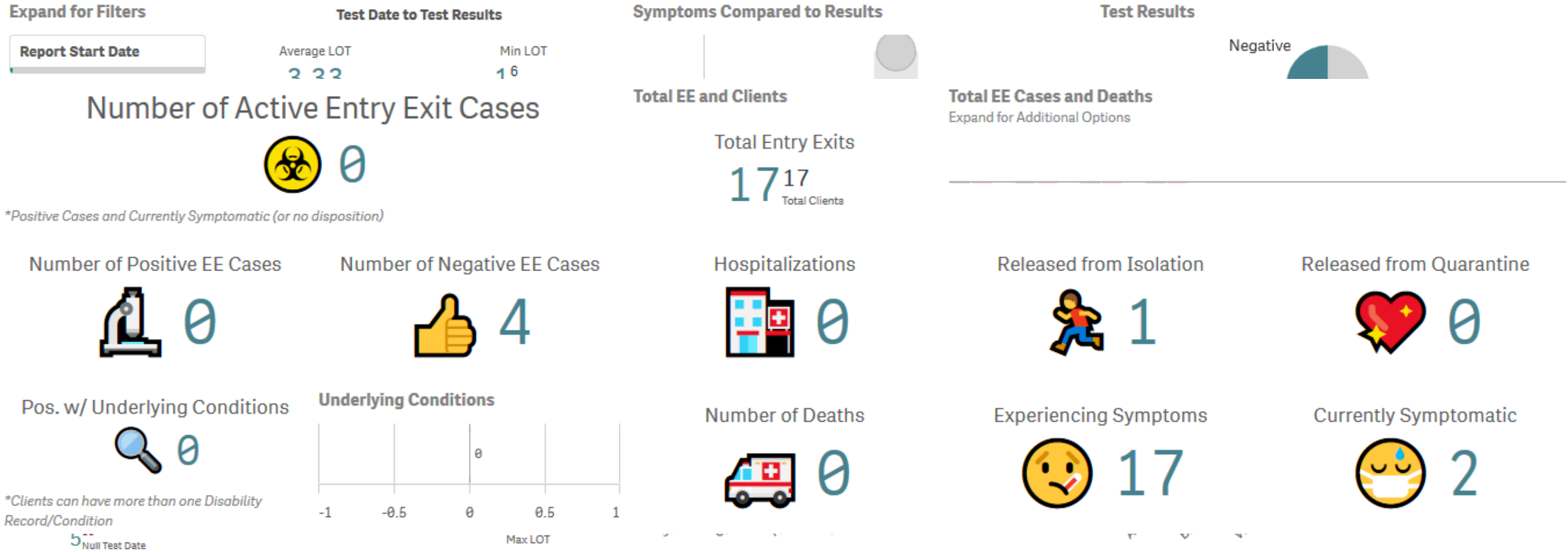
System Updates

COVID-19 data in HMIS

With more data entered, we could populate reports like these:



When you may need Project updates in HMIS

- ❑ Has funding changed or do you expect it to?
- ❑ Do some services have dedicated funding?
- ❑ Have beds moved from one location to another?
- ❑ Has the number of year-round or temporary beds changed? (Up or down)
- ❑ Are beds dedicated to a new group of clients like youth, veterans, or chronically homeless?
- ❑ Do you (or funders) want to report on different groups/services separately from others?

If you answer Yes to any of these questions, reach out to us at the Data Center!

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ESG-CV Reporting

What we know

Special ESG-CV CAPER being created

De-duplicates clients across all sub-grantees

Submitted for entire HMIS Implementation

Quarterly

What we don't know

The Specifications – what measures will be different

1st deadline …October?

NCCEH

ZenDesk Updates for Helpdesk

- The history of your conversation with NCCEH's Data Center *should* now appear!
  - Just like a regular email!
  - Please let us know if you have any issues, concerns, or questions
- Emails to hmis@ncceh.org

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We Love Data

Point in Time

What data do we have today?

- Total People Counted Experiencing Homelessness January 29th, 2020
  - Data submitted to HUD for entire CoC
  - Limited Data available including
    - By Household type
    - By Sub-population (Vets, Youth, CH)
    - By Living Situation (Unsheltered, ES, TH)

- Specific requests for data go to the Data Center (hmis@ncceh.org)

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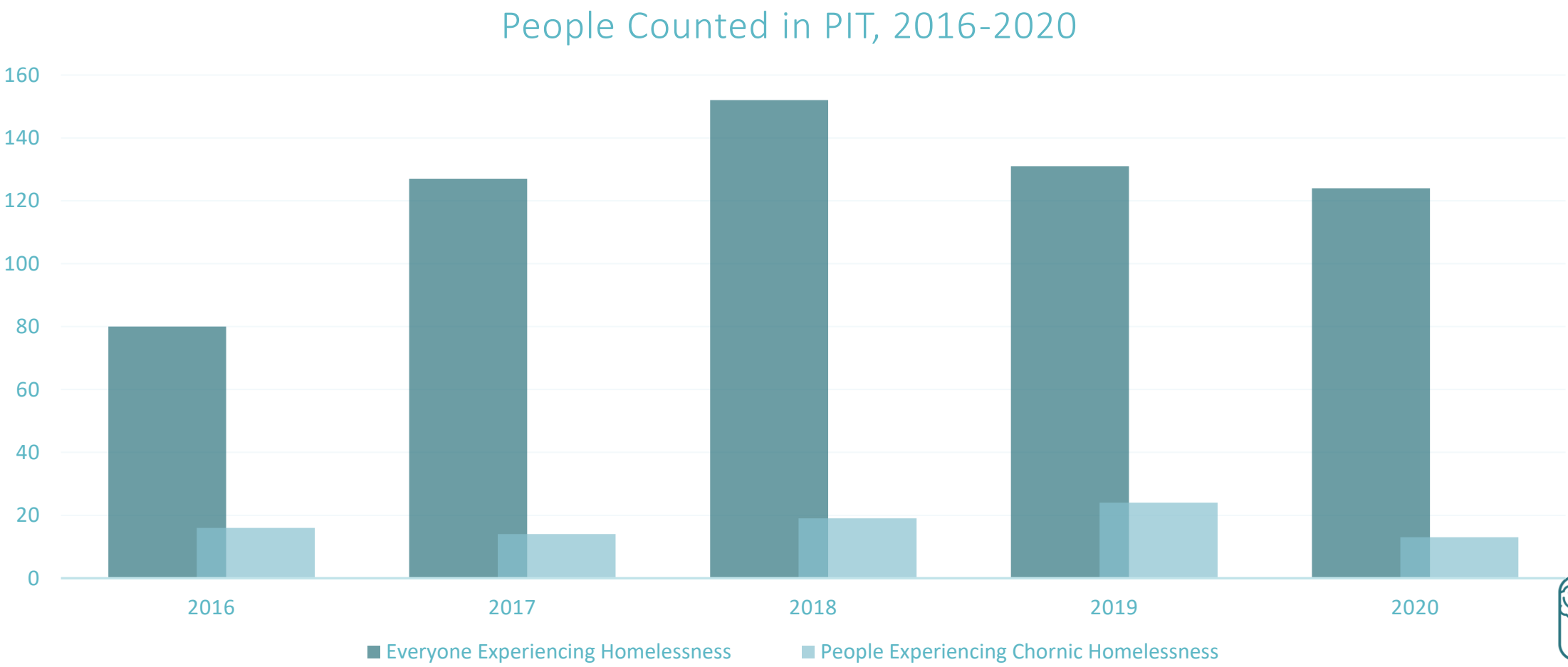
What does one day tell us?



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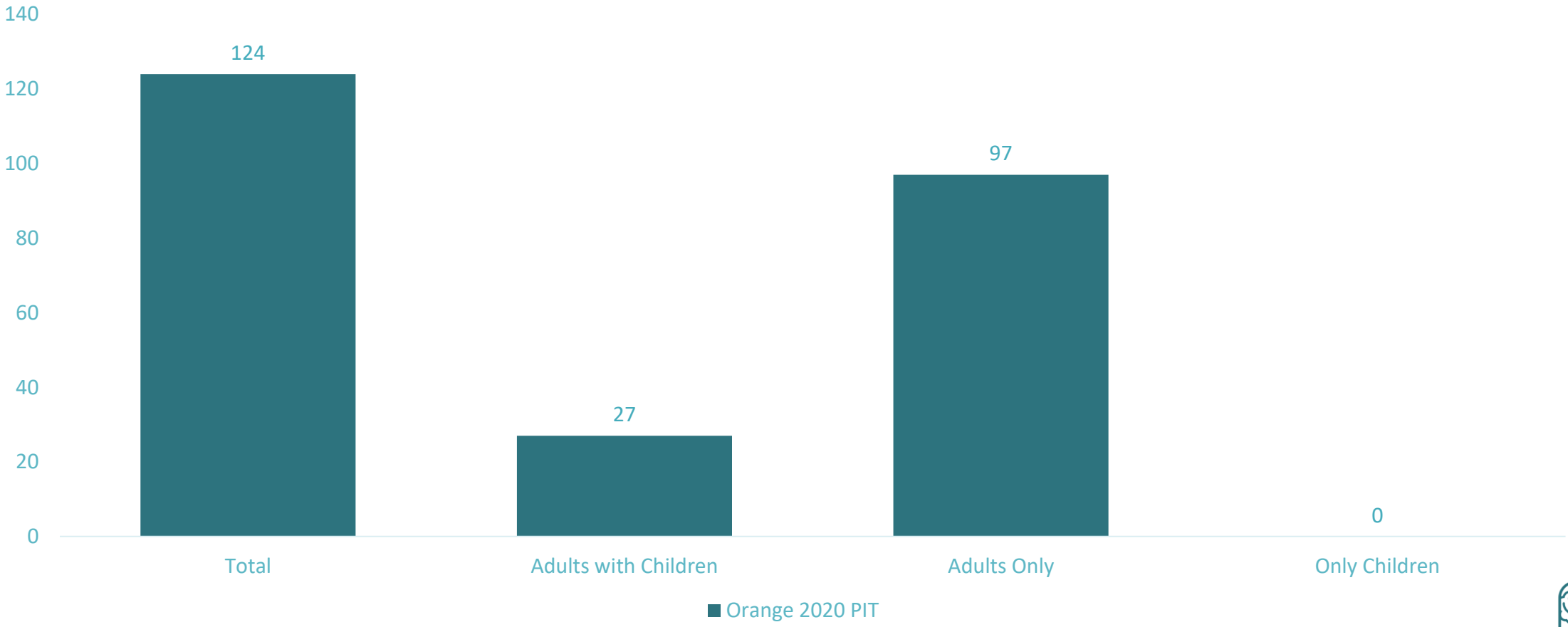
2020 Point in Time Count



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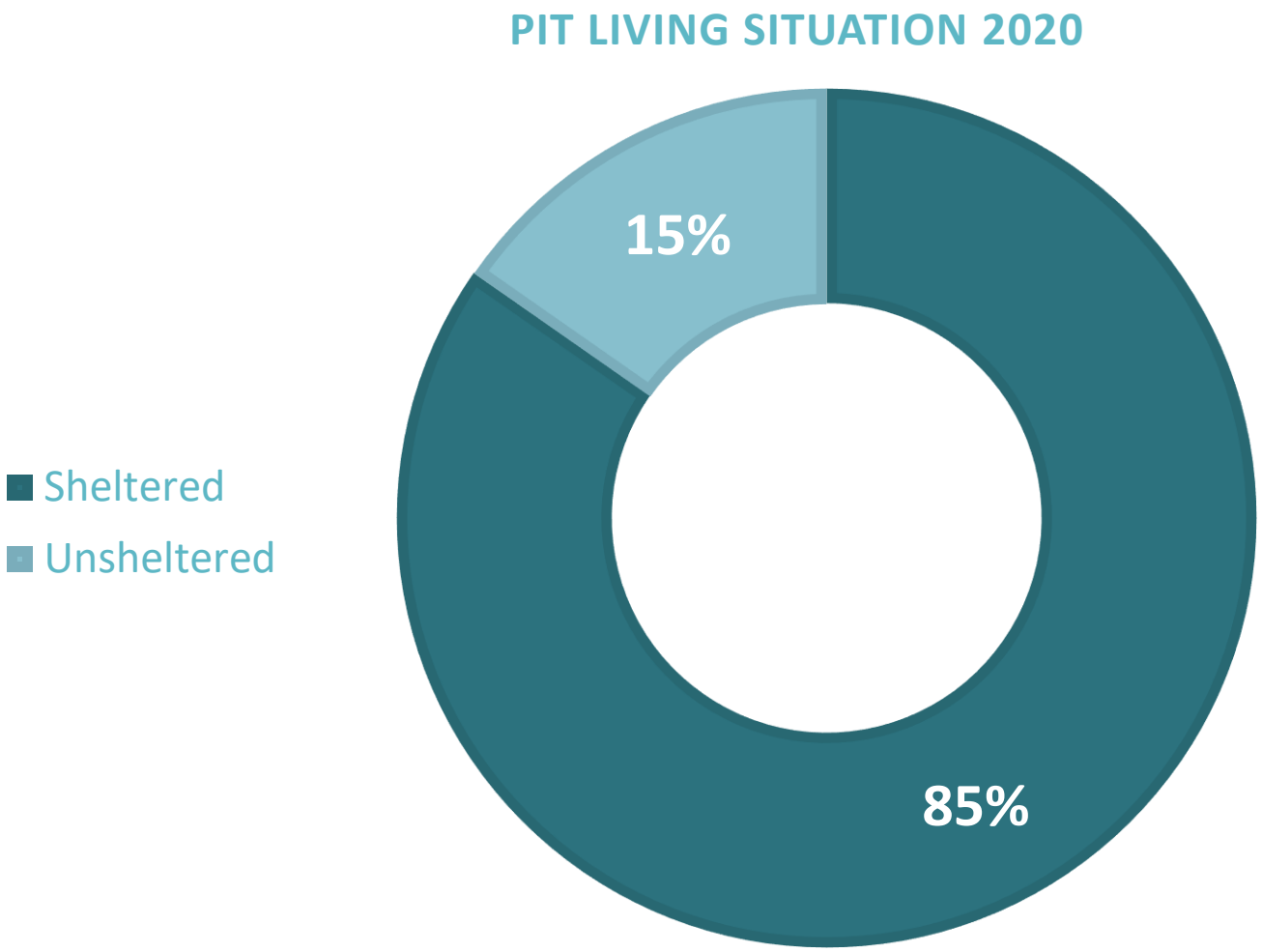
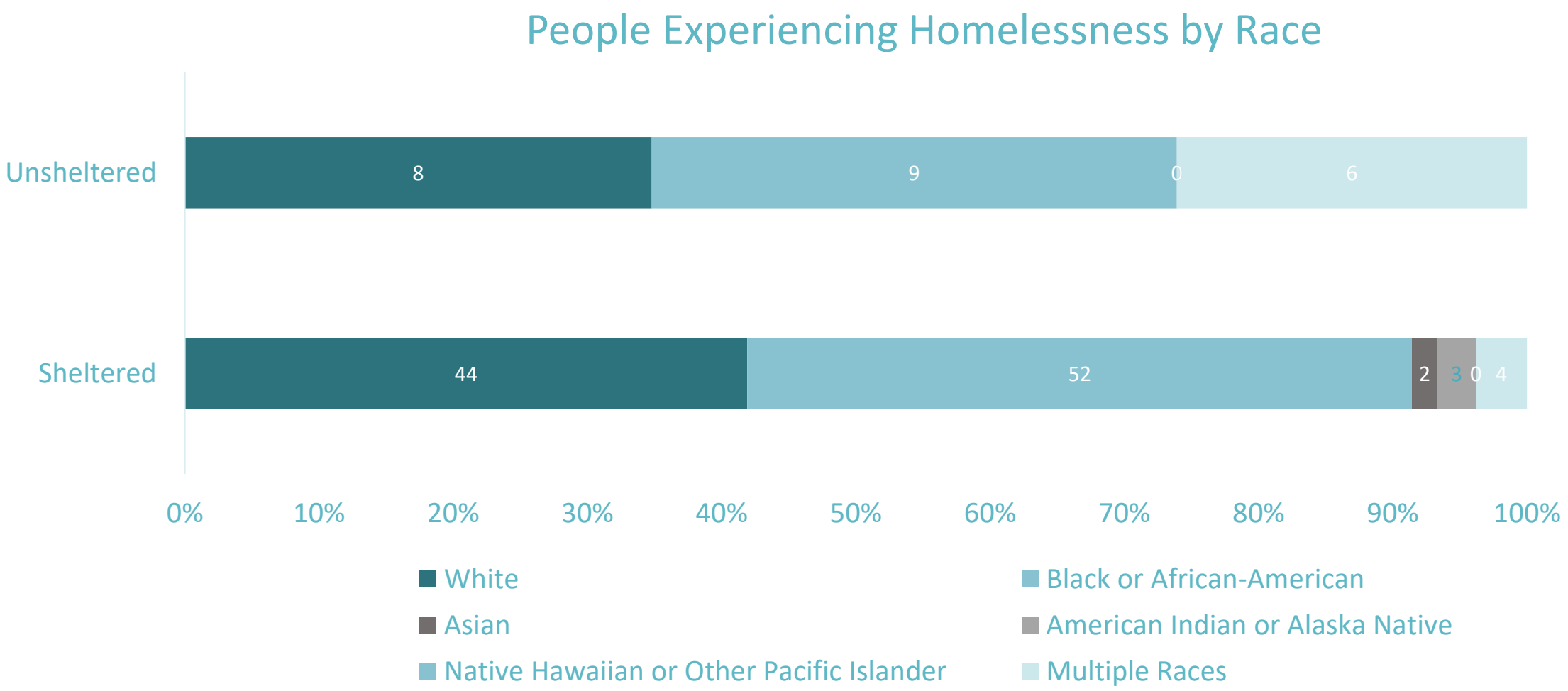
Location of People Experiencing Homelessness



NCCEH

Who was counted?



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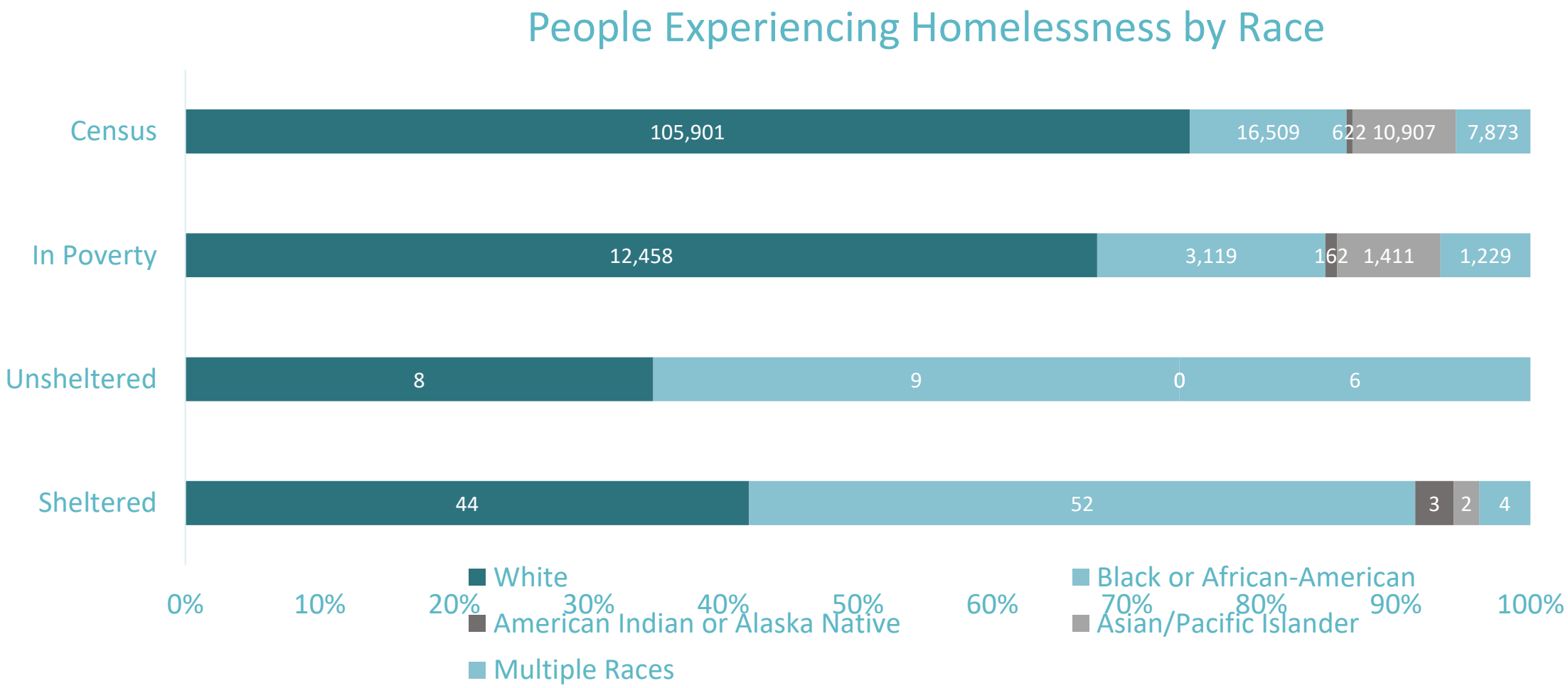

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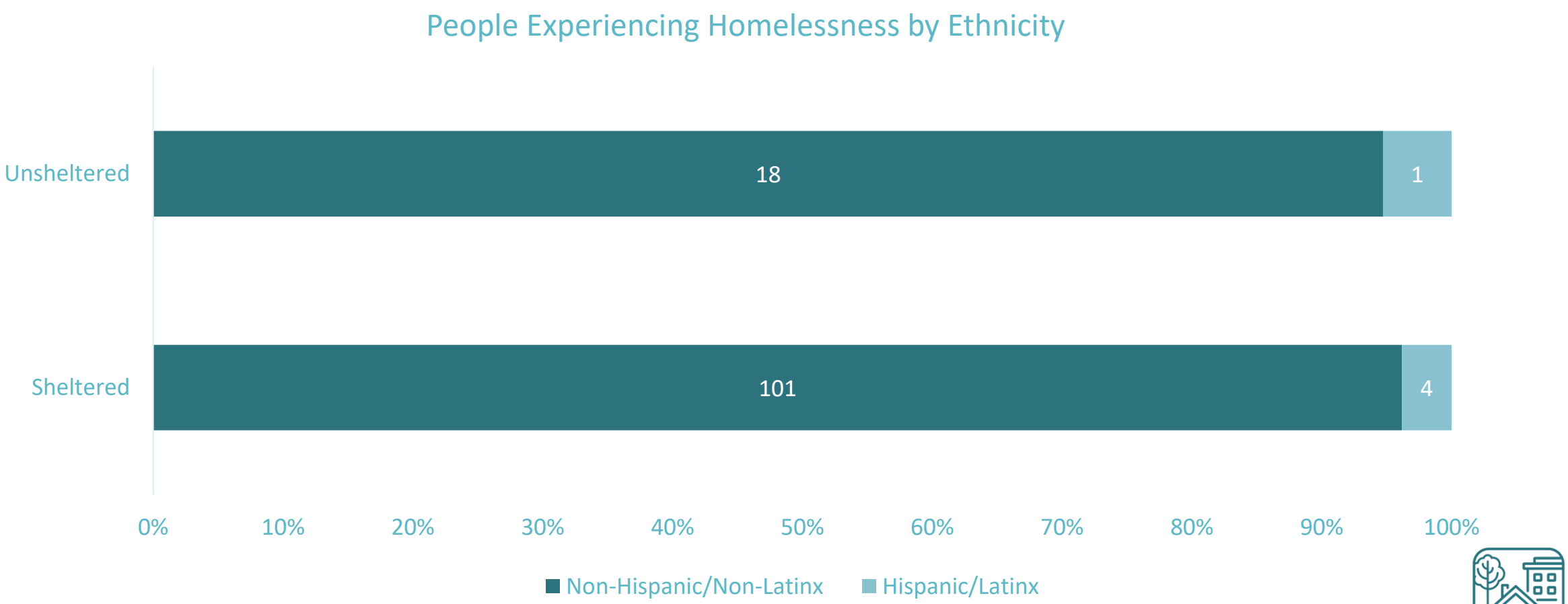

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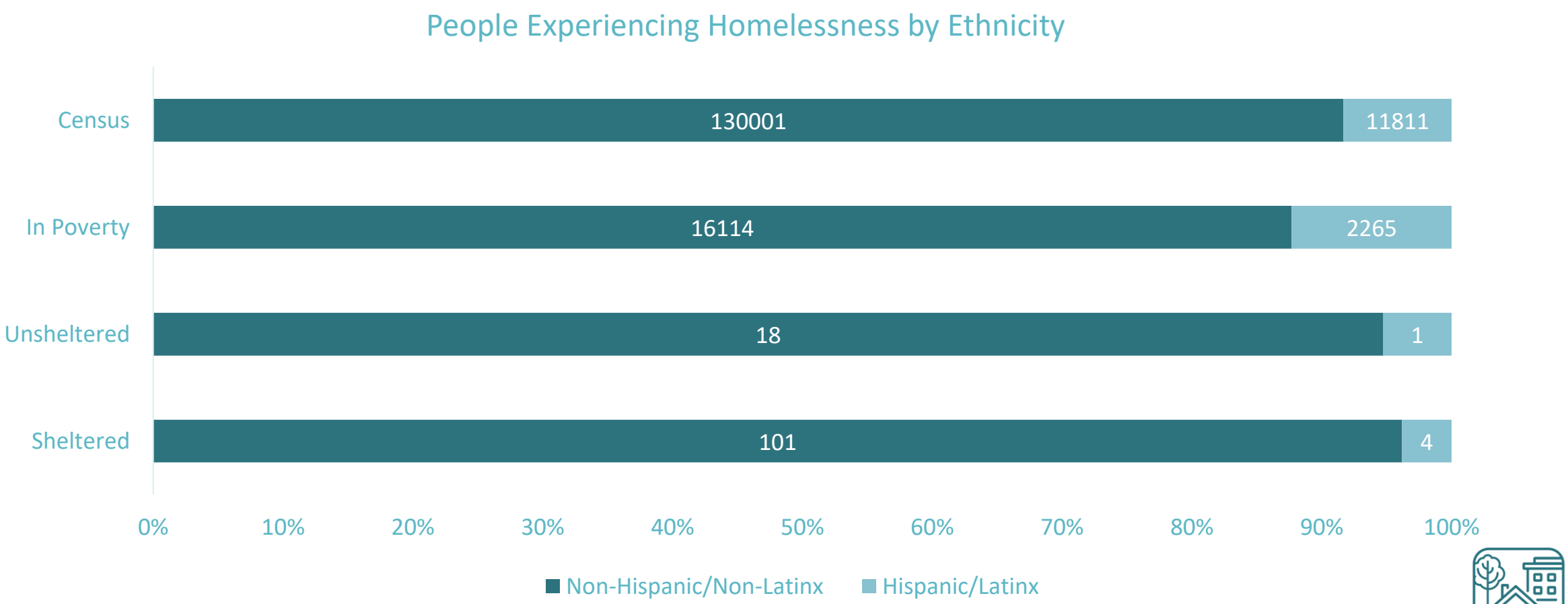
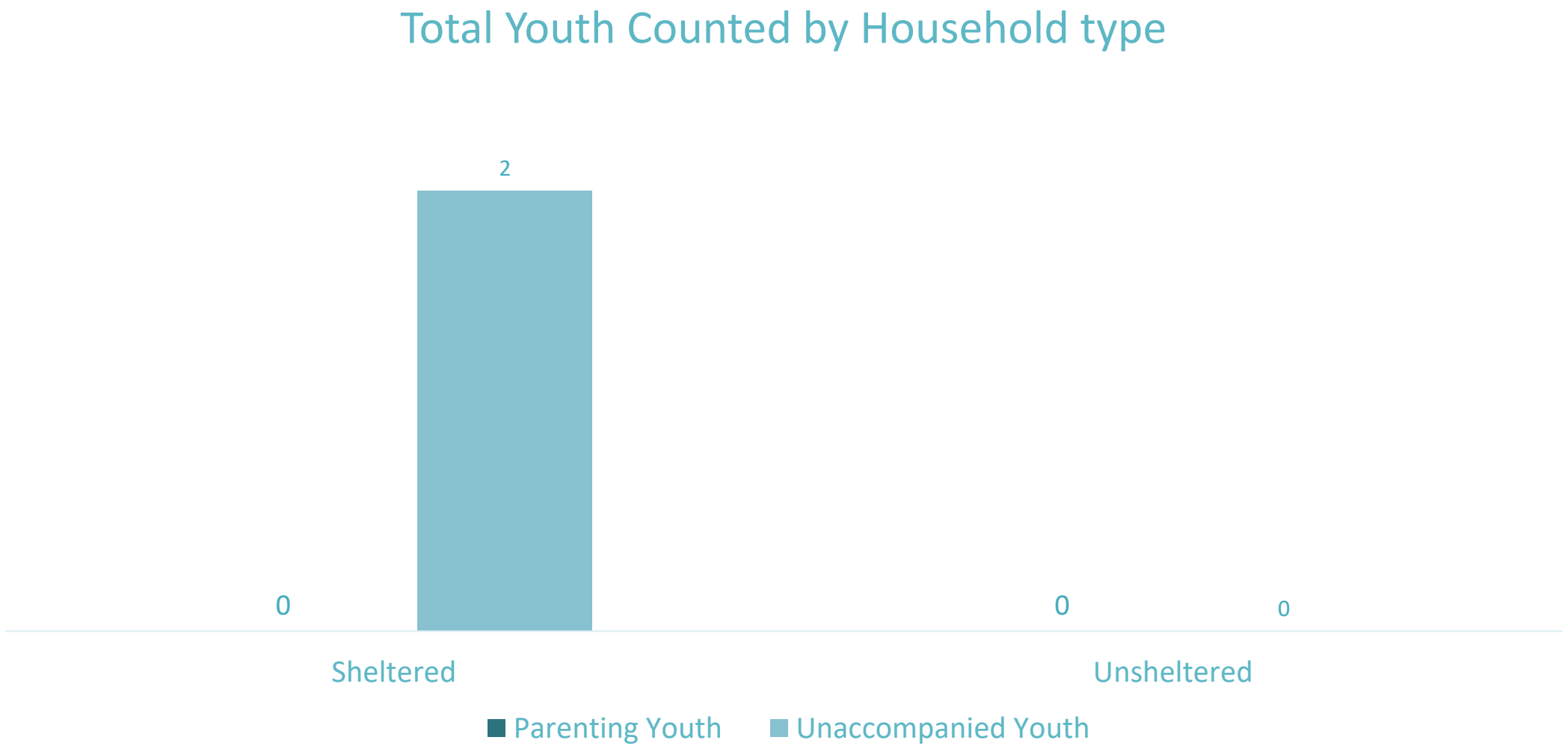


NCCEH

PIT Across Orange: Sub-populations



NCCEH

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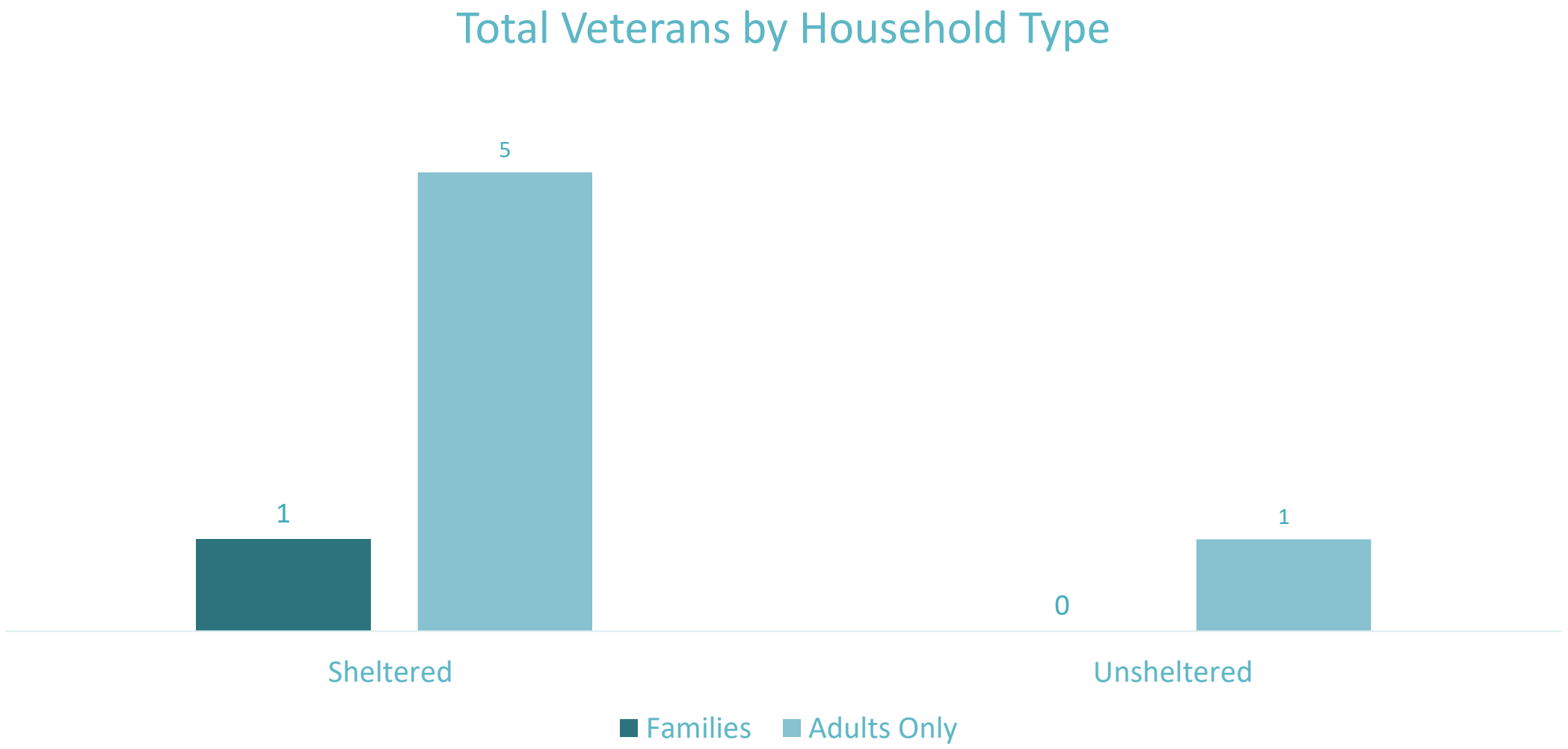
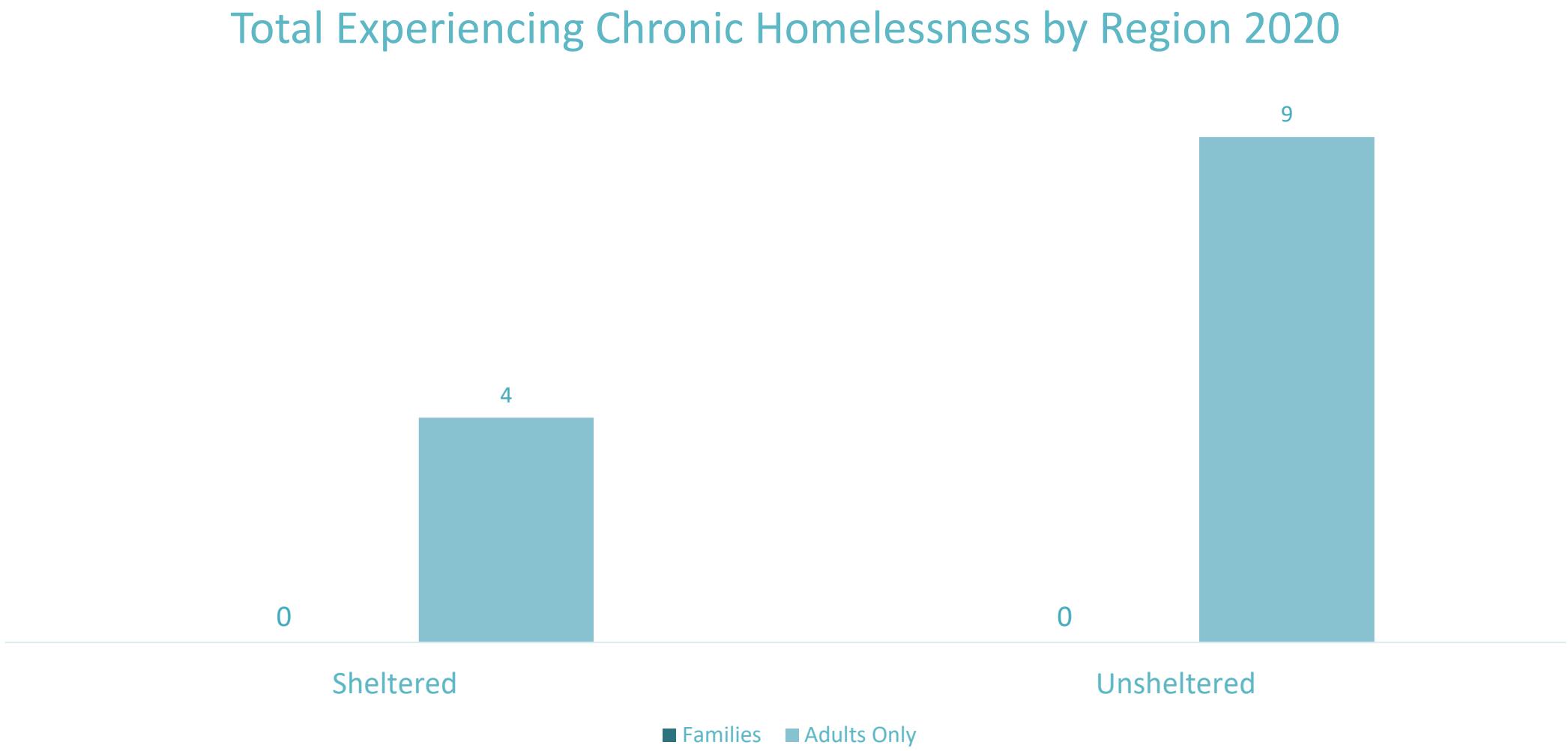
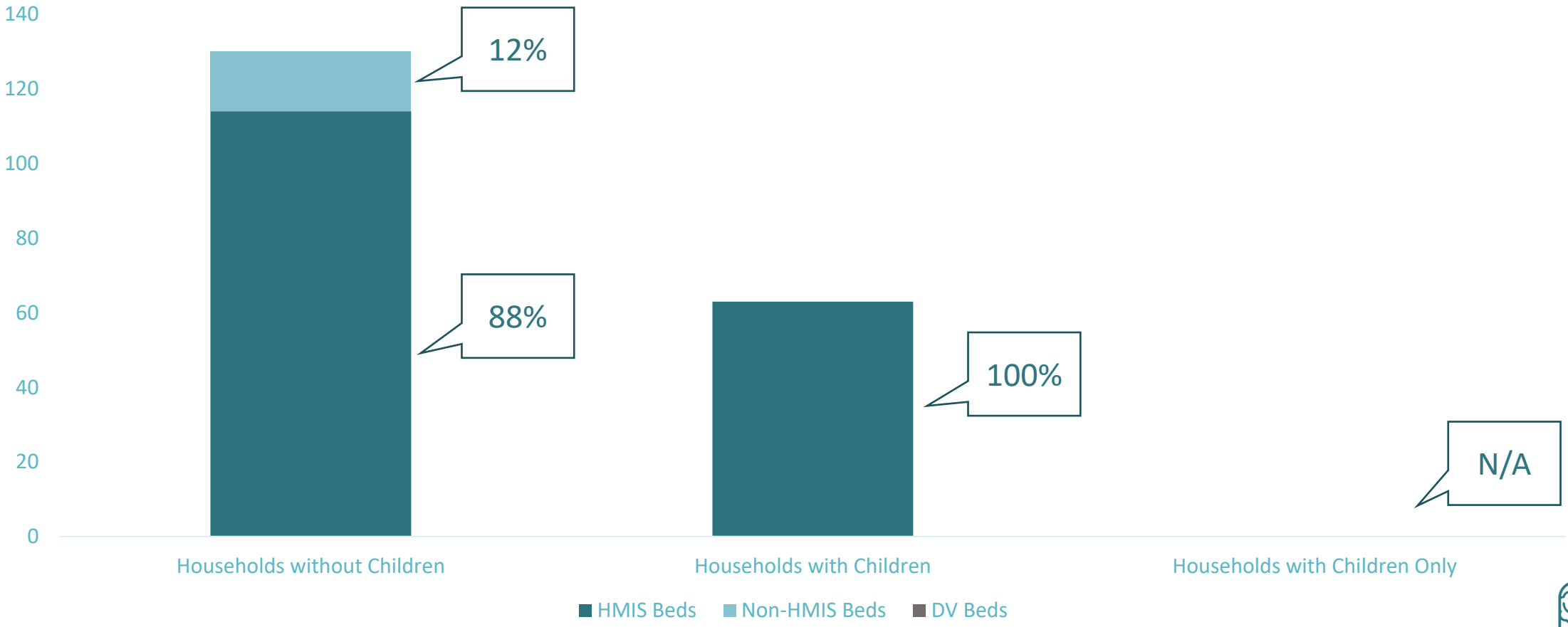


PIT Across Orange: Sub-populations



Housing Inventory Count

HMIS Bed Coverage



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Housing Inventory Count

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How can we help?

Case Manager Tab

Track who is a client's Case Manager

Record client's point person

Save best contact information

See changes over time

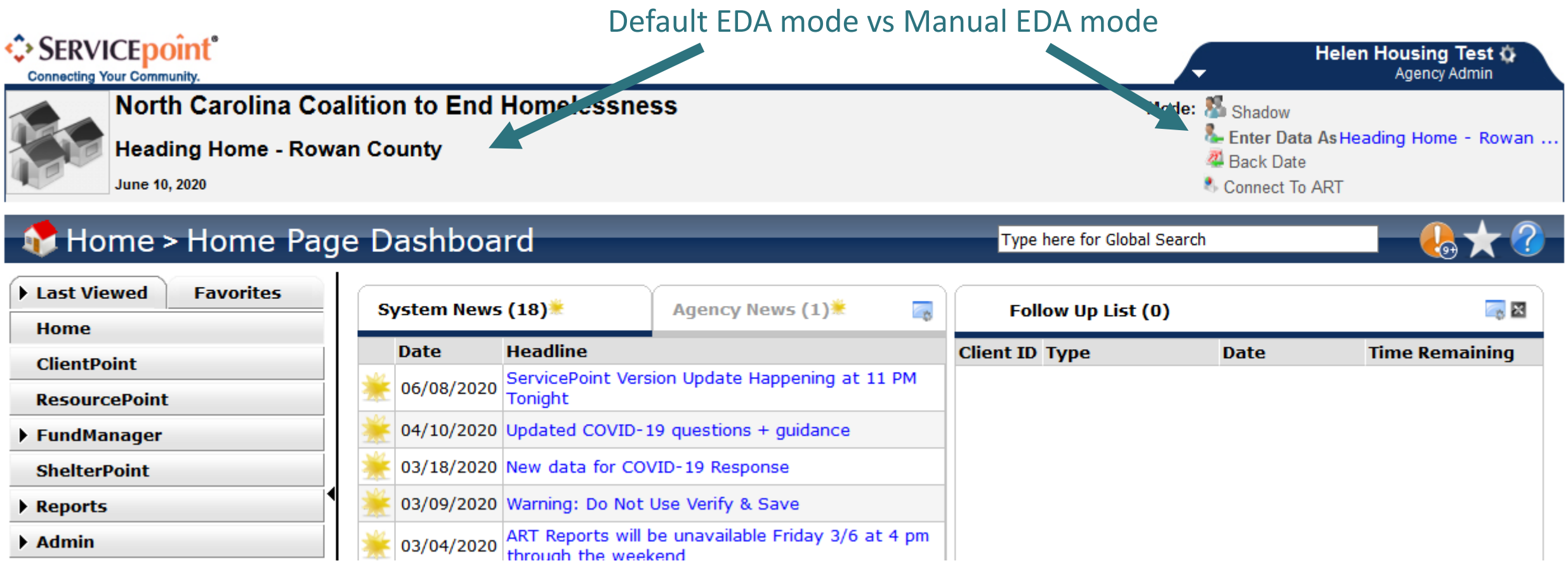
Access other ServicePoint features:

- My Client Counts Reports
- Follow-up Lists
- Case Plans/Goals

NCCEH

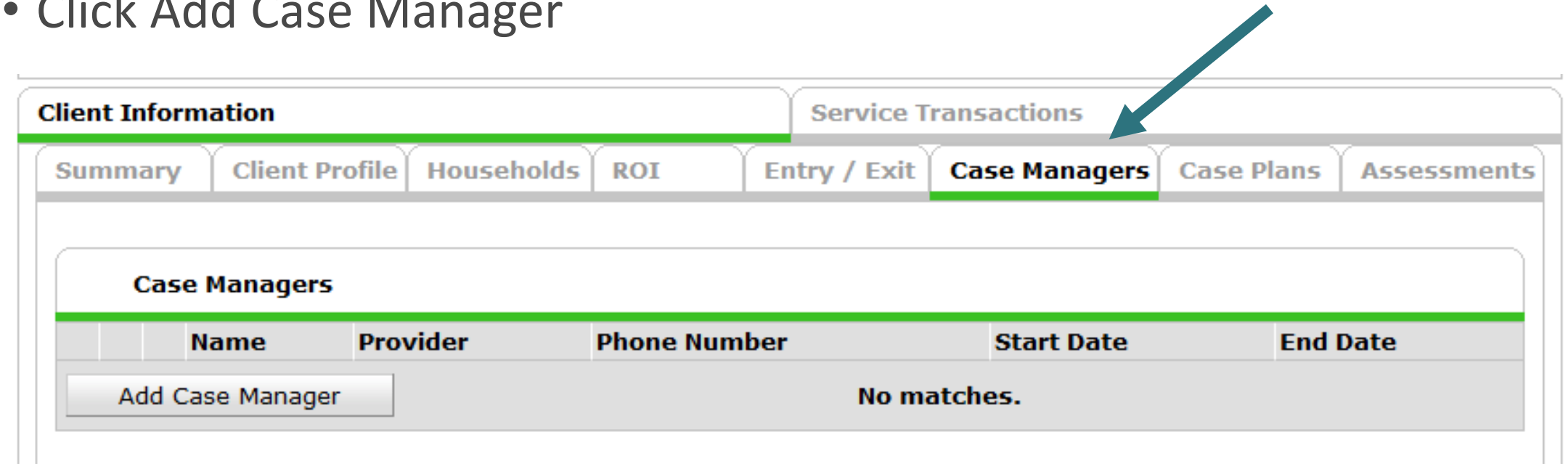
Track who is a client's Case Manager

- Enter Data As (EDA) mode matters!



Add a Case Manager

- Go through ClientPoint
- Case Managers is under the Client Information Tab
- Tabs can be adjusted for each project by the Data Center
- Click Add Case Manager



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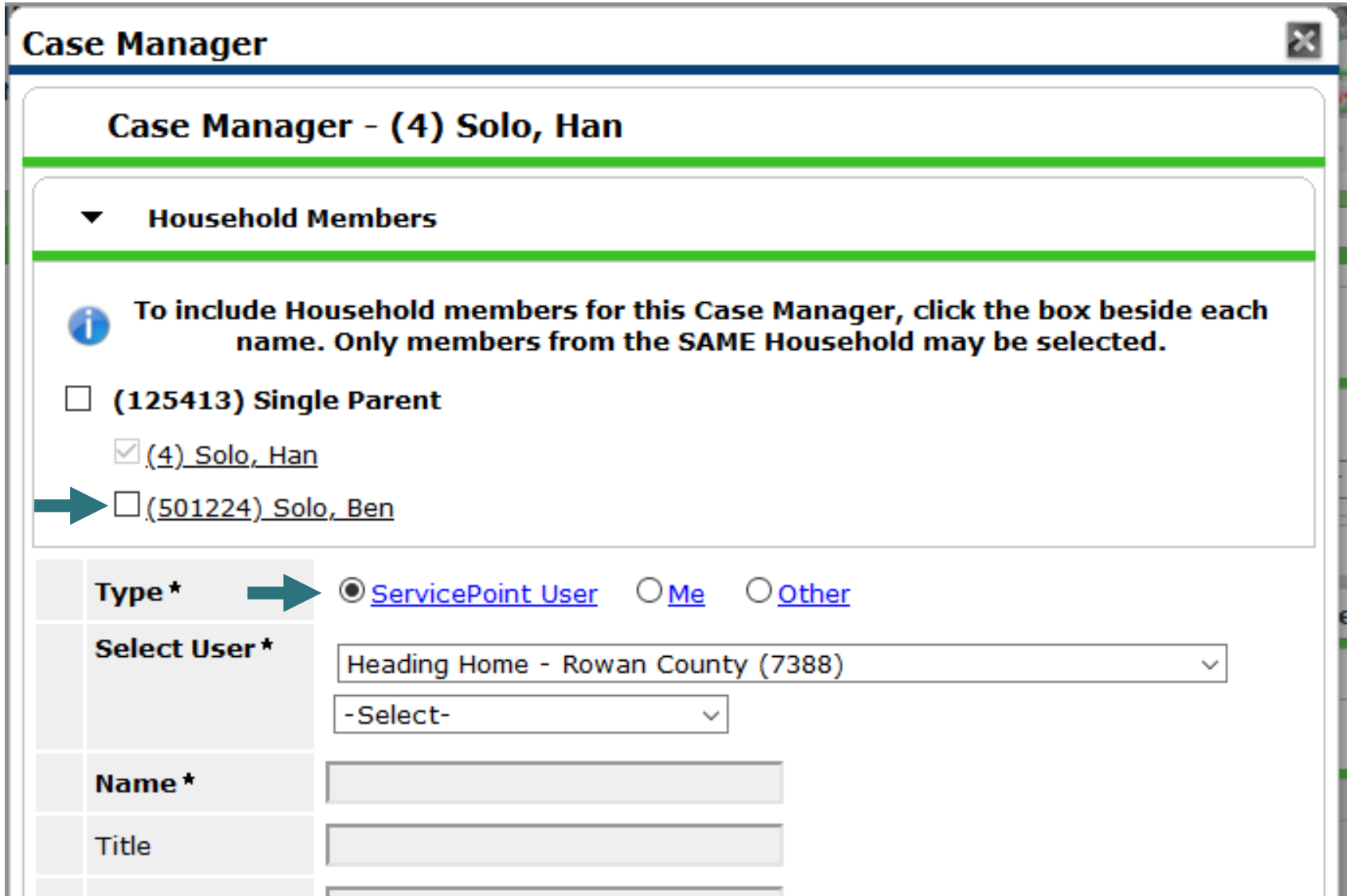
Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?



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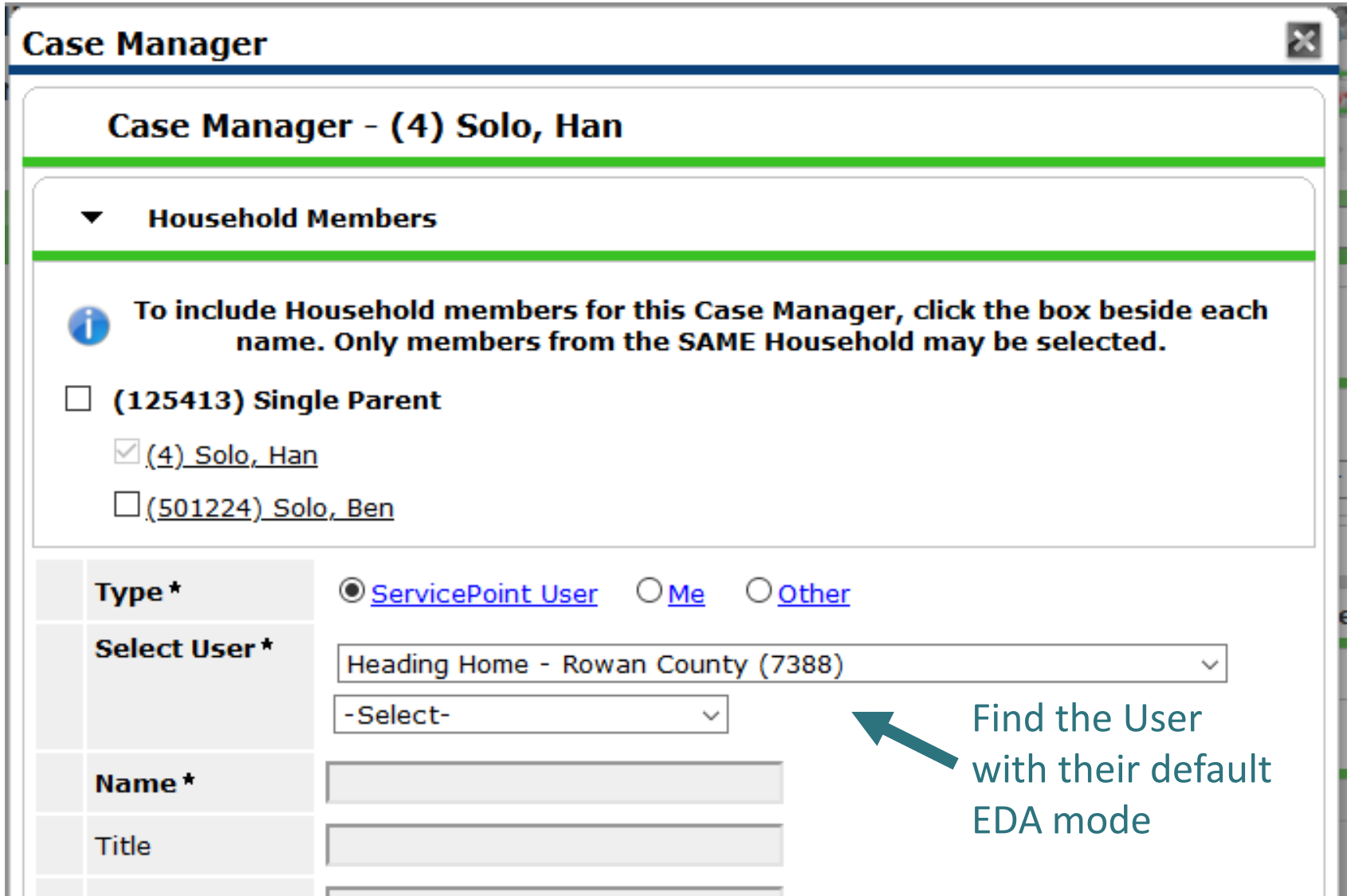
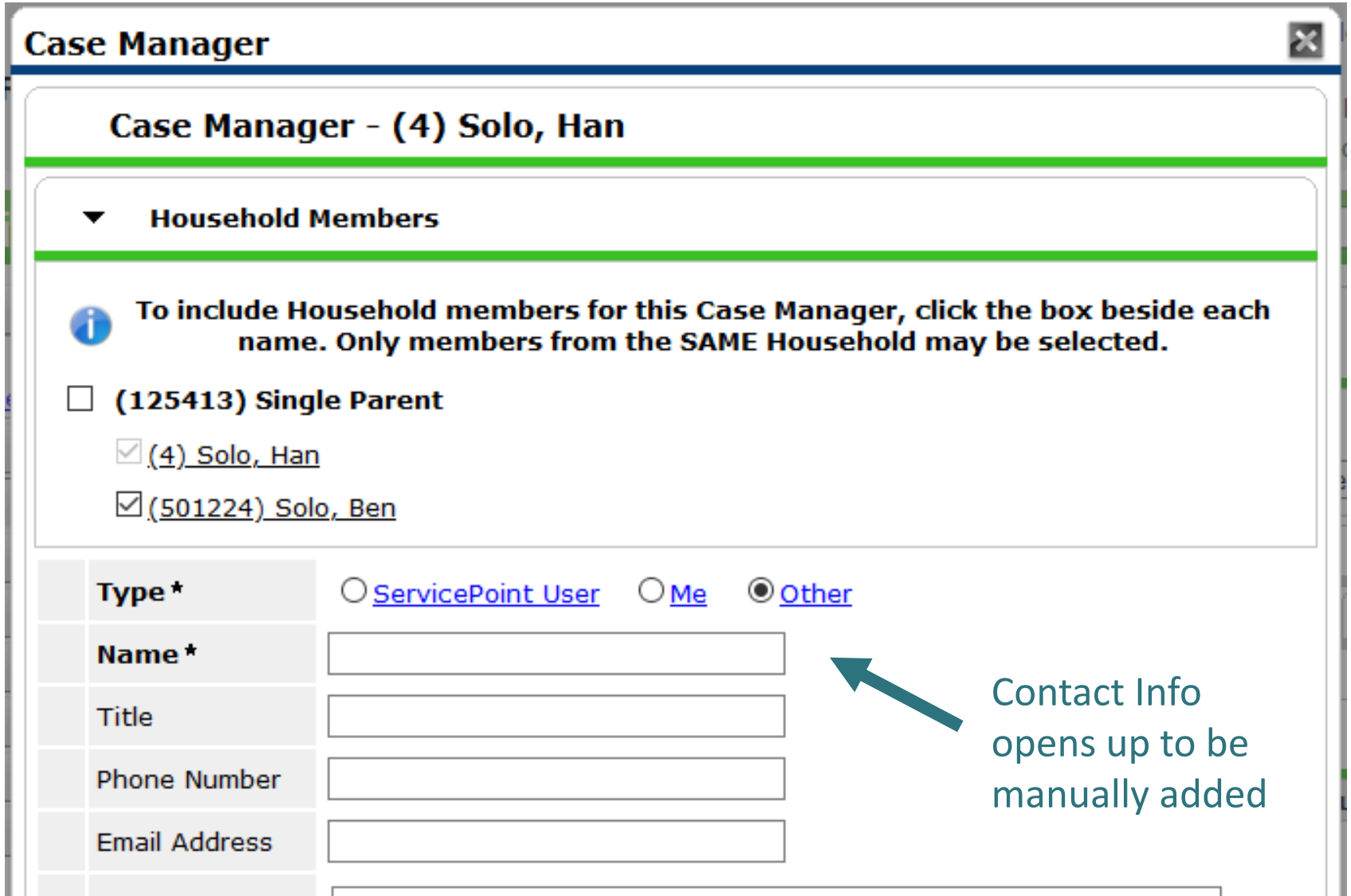


Add a Case Manager: Other

Decision Points:

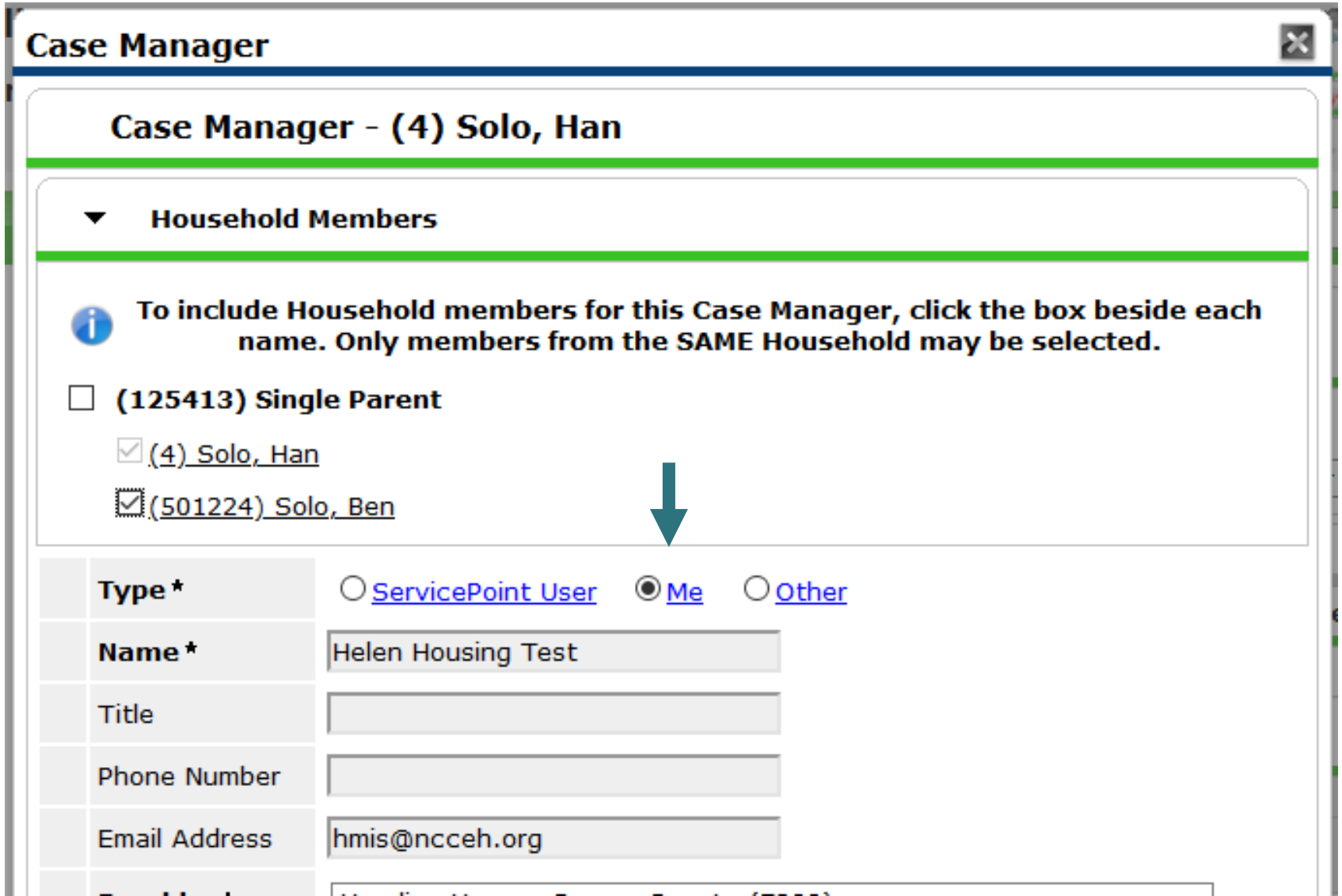
- Does the case manager work with the whole household?
- Is the case manager an HMIS User?



Add a Case Manager

Usually, you are selecting yourself!

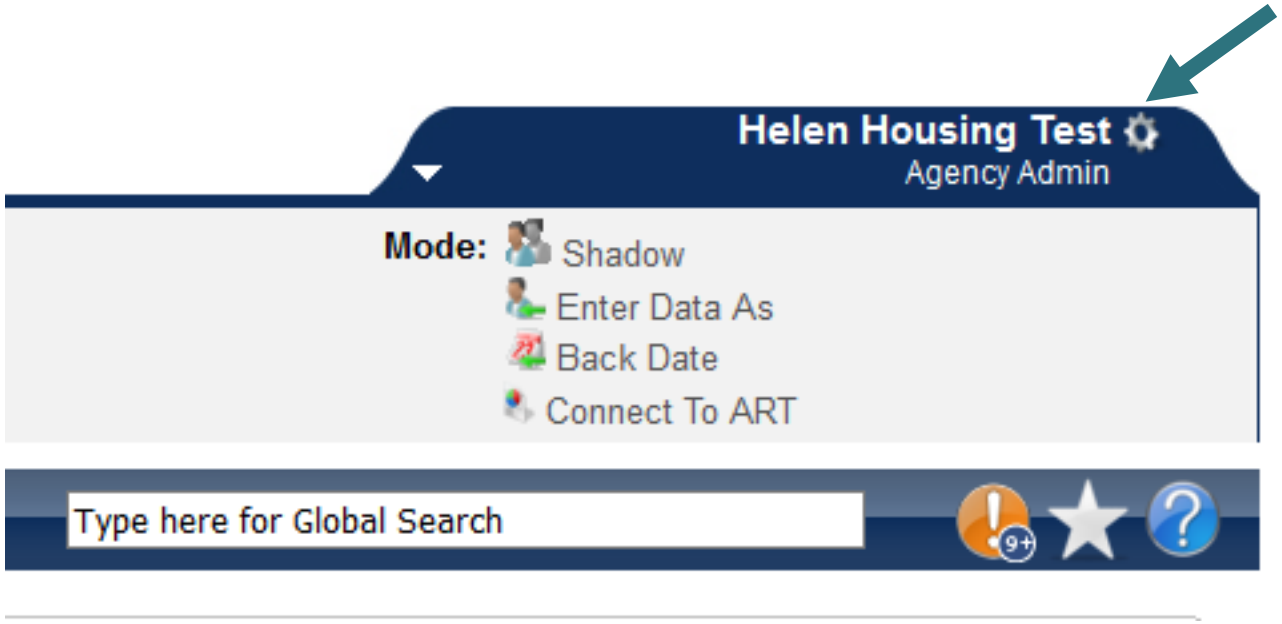
Name & Contact Info automatically appears



How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Find the User Profile Setting icon



How do you manage contact info in HMIS

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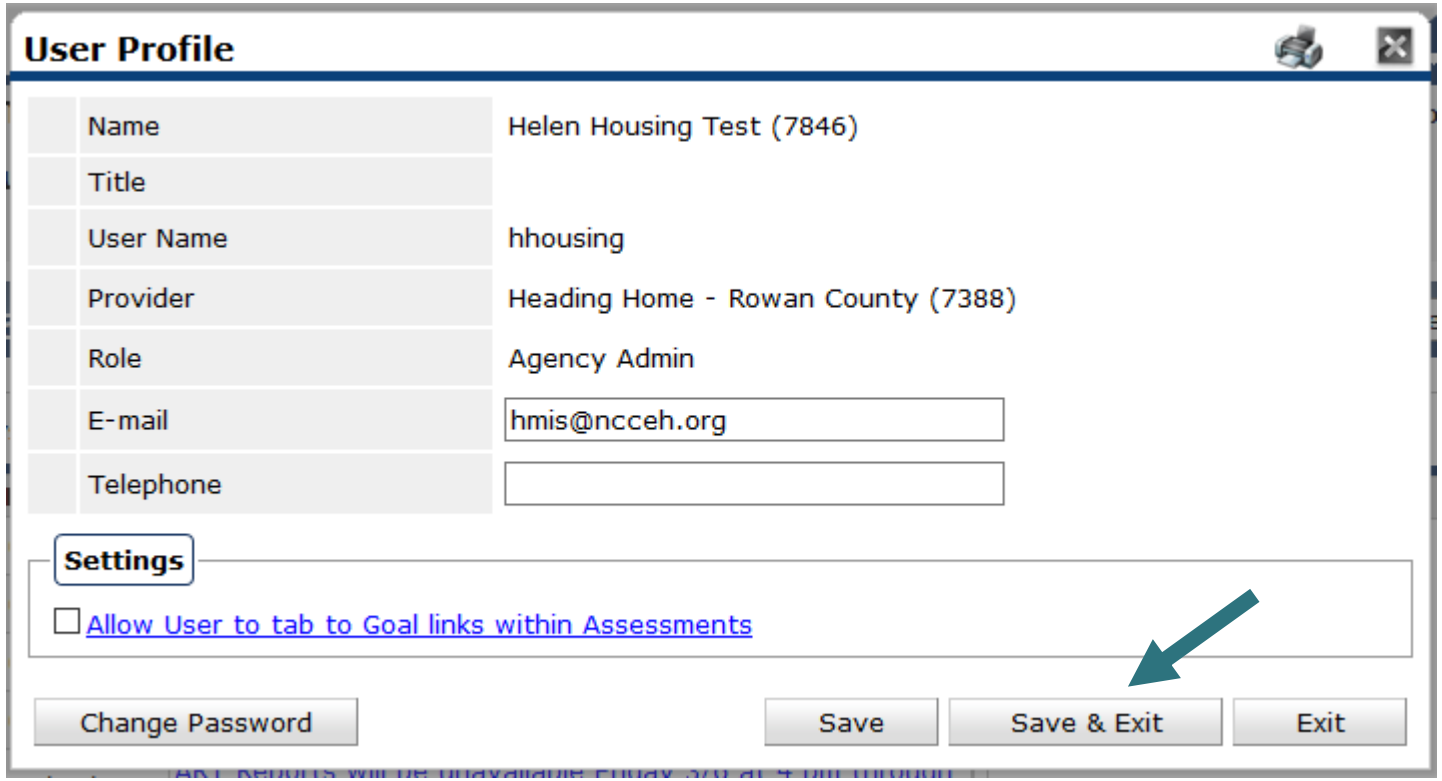
- Update E-mail and Phone info
- Save & Exit



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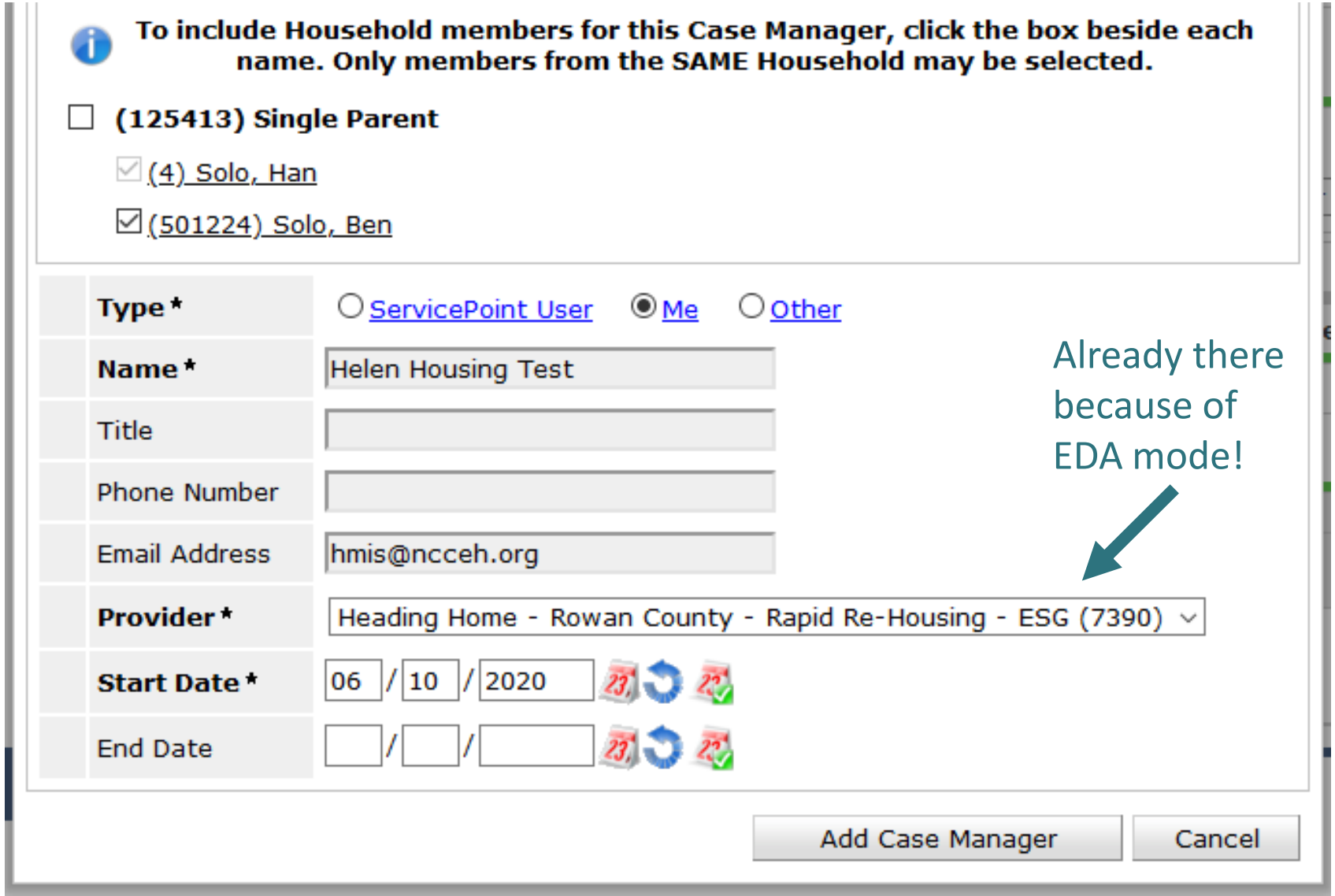
Add a Case Manager

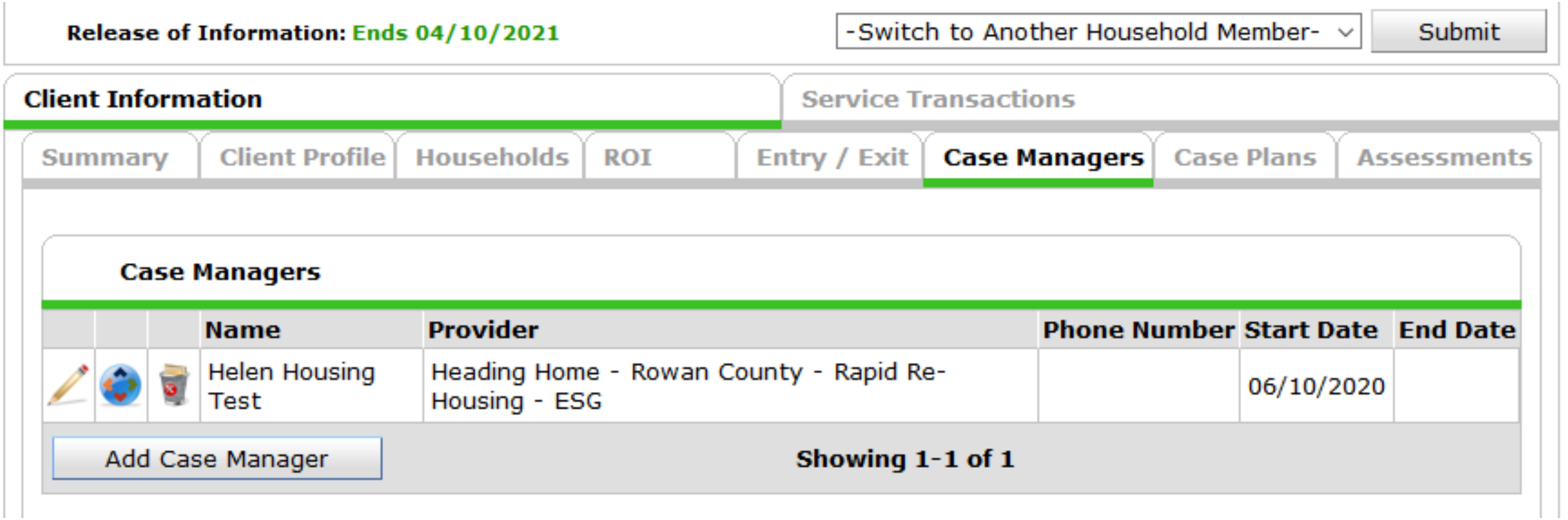
Decision Points:

- Which project does the case manager work on behalf of?
- When did they start working together?



Case Manager Saved!

- Now anyone in my agency or visibility group can see our work together!



Let’s see this in action

HMIS@NCCEH training site for ServicePoint*

sp5.servicept.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.

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Counts Reports

Home Page Counts Dashlet Reports

Pros:

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Rolling dates available

Cons:

- Limited, cannot change options
- Only 4 spots
- EDA mode sensitive

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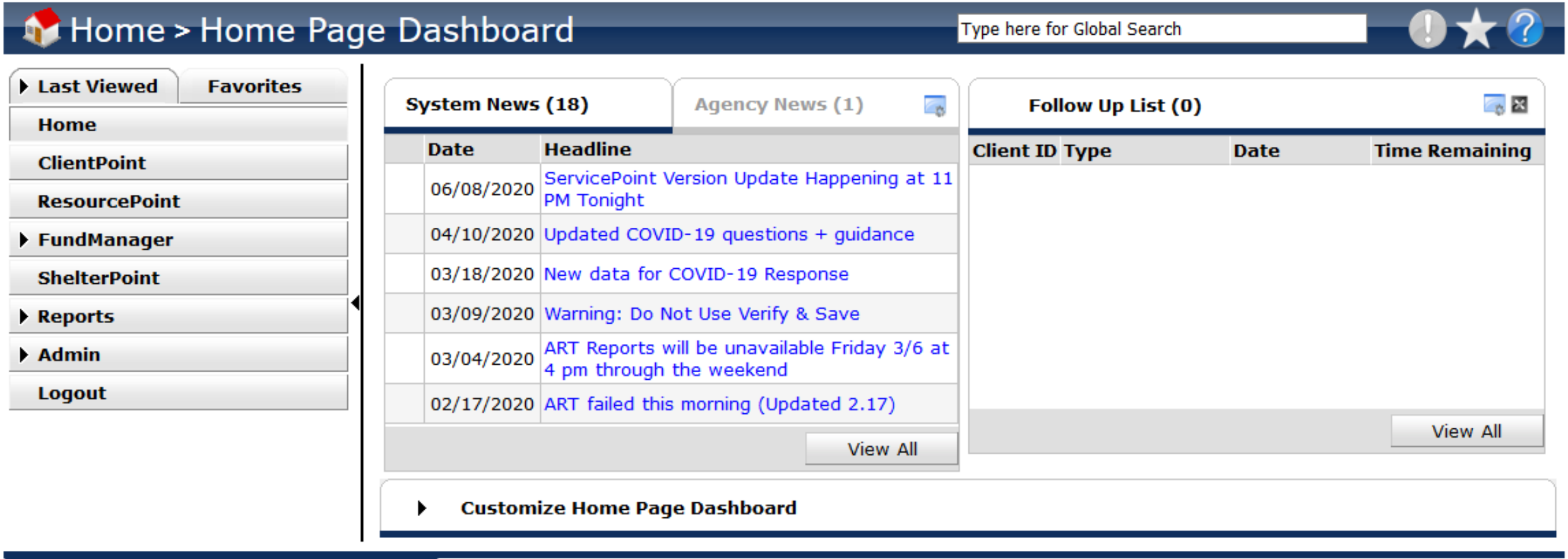
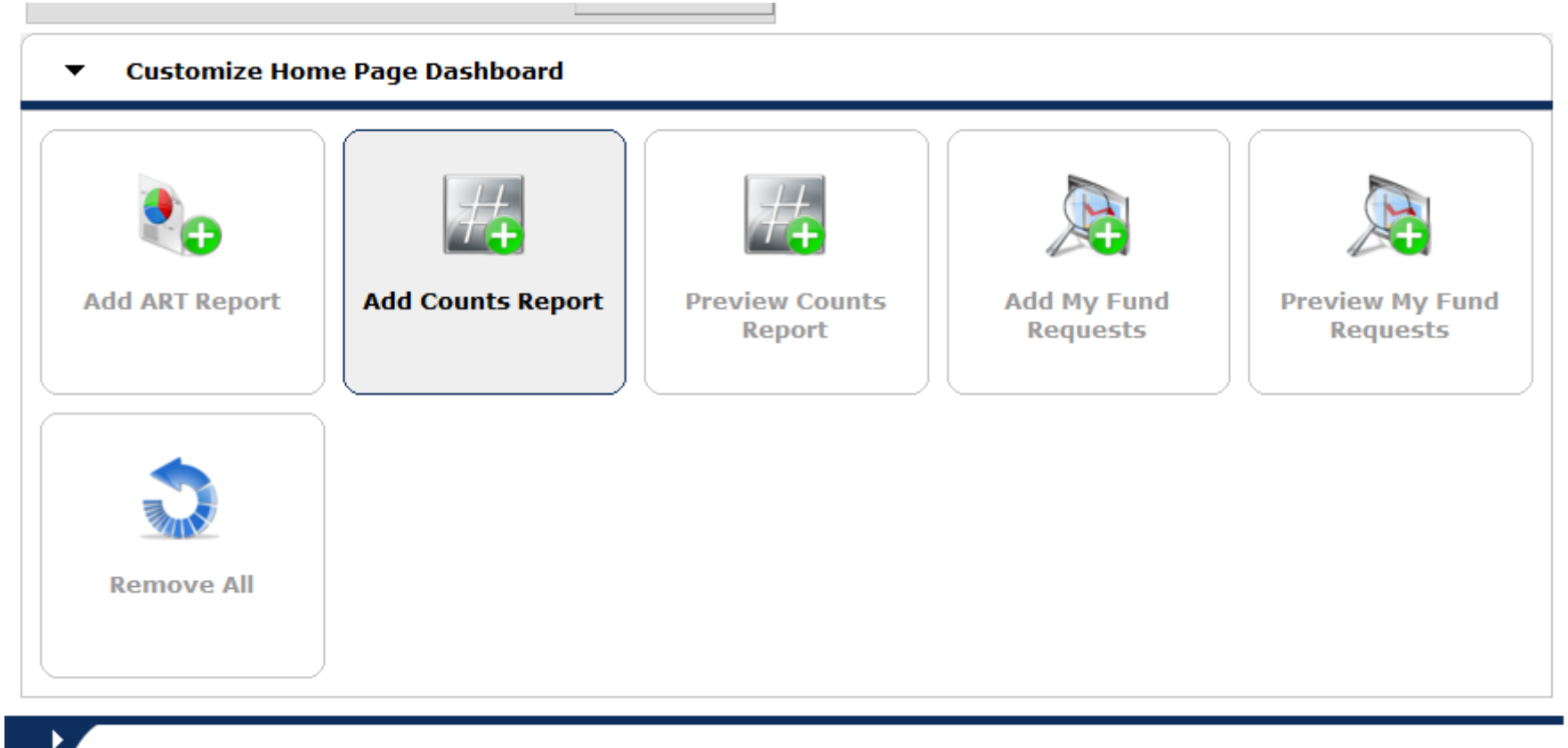
Set-Up Counts Reports

- Open the black arrow for Customize Home Page Dashboard



Set-Up Counts Reports

- Look for Add Counts Report
- Options may vary



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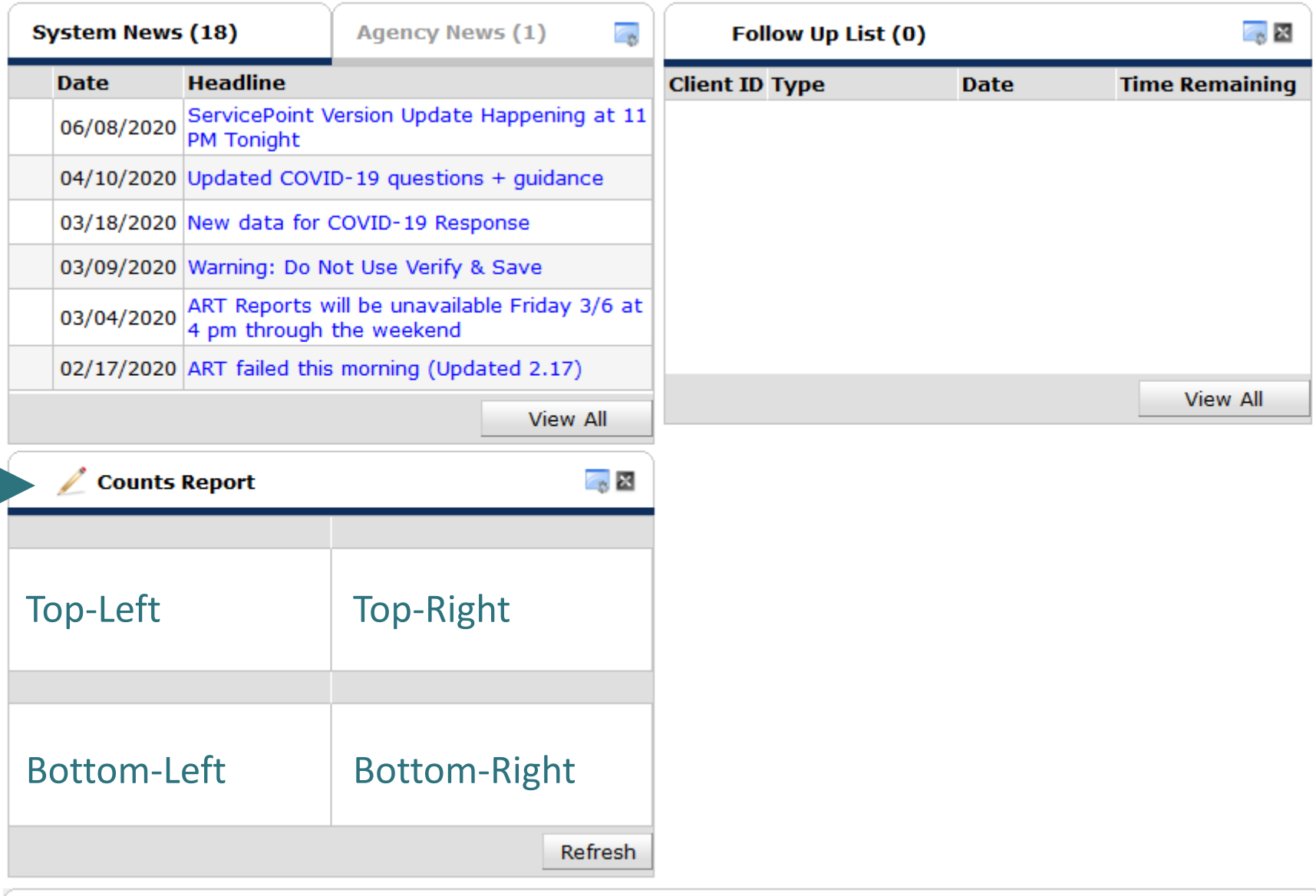
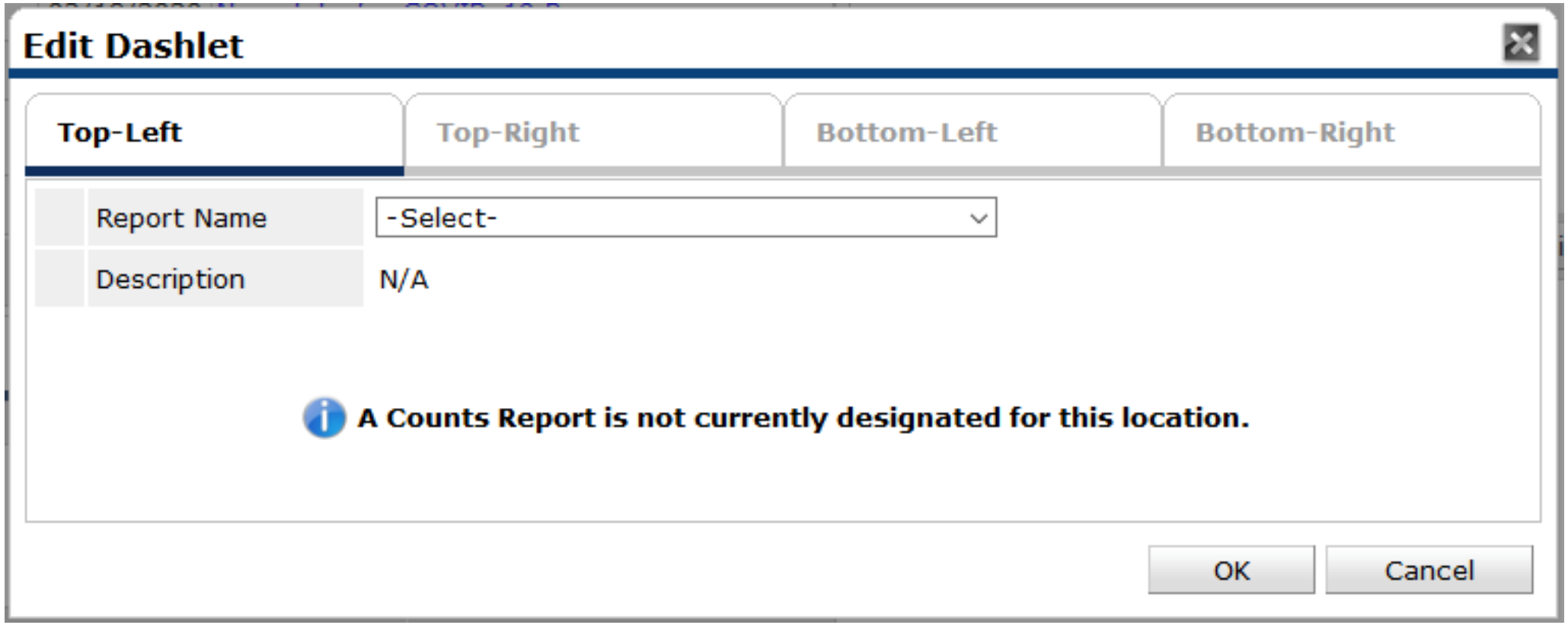
Set-Up Counts Reports



Click the Pencil!

NCCEH

Set-Up Counts Reports



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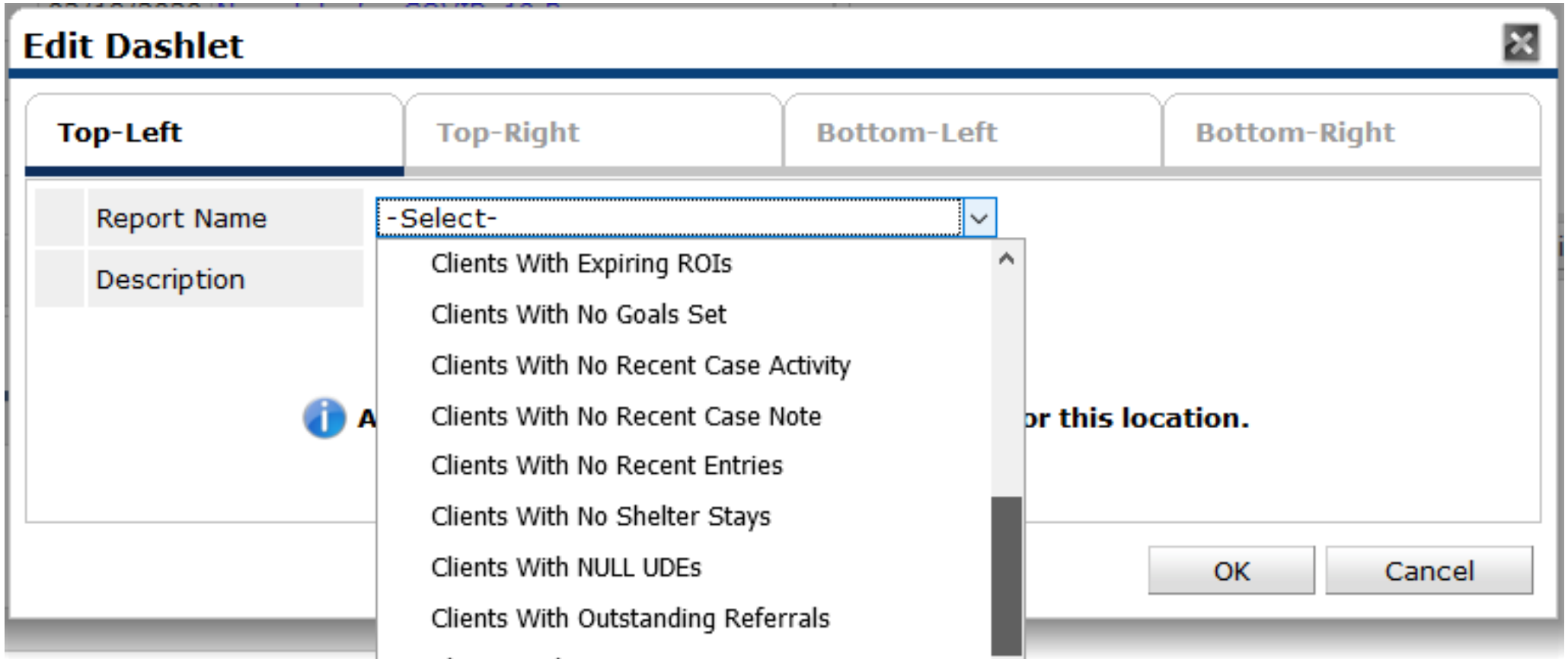
Set-Up Counts Reports

- Standard list to choose from



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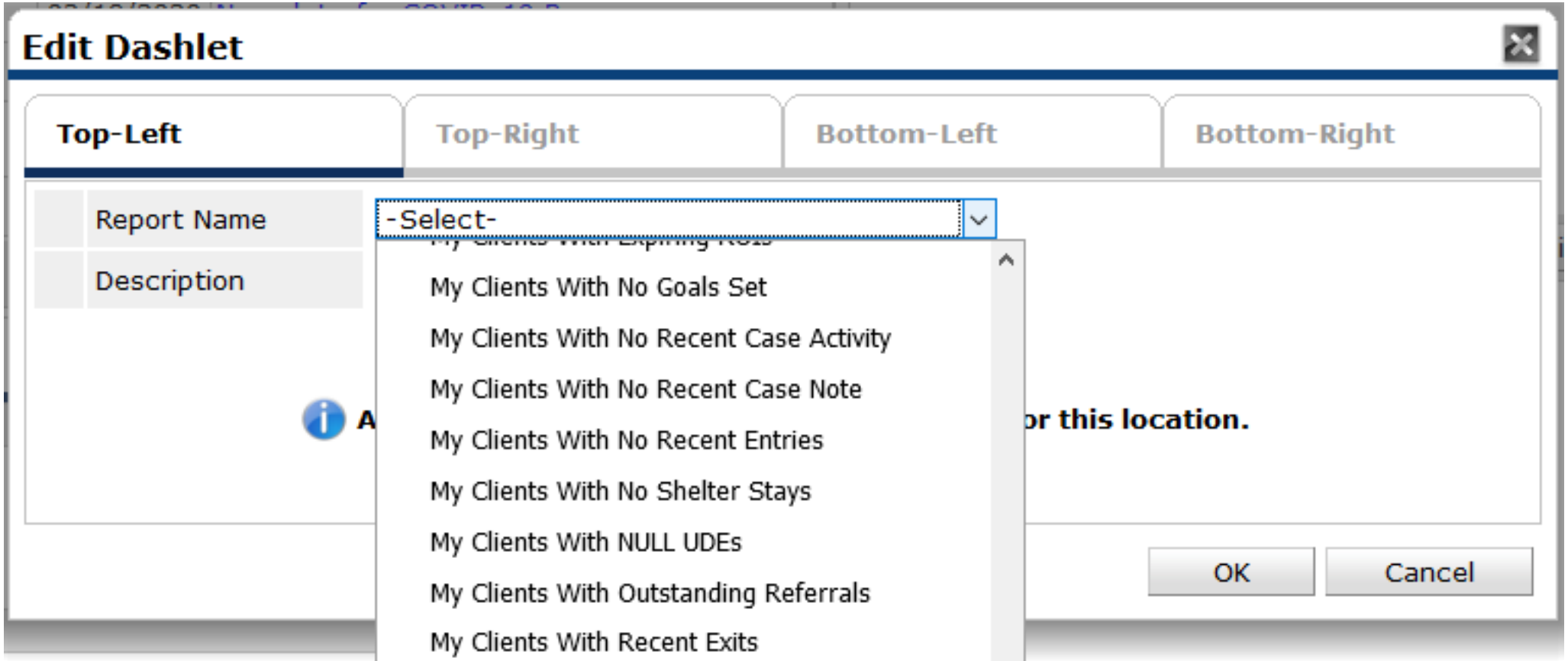
Set-Up Counts Reports

- Many use Case Manager tab to find “My Clients”



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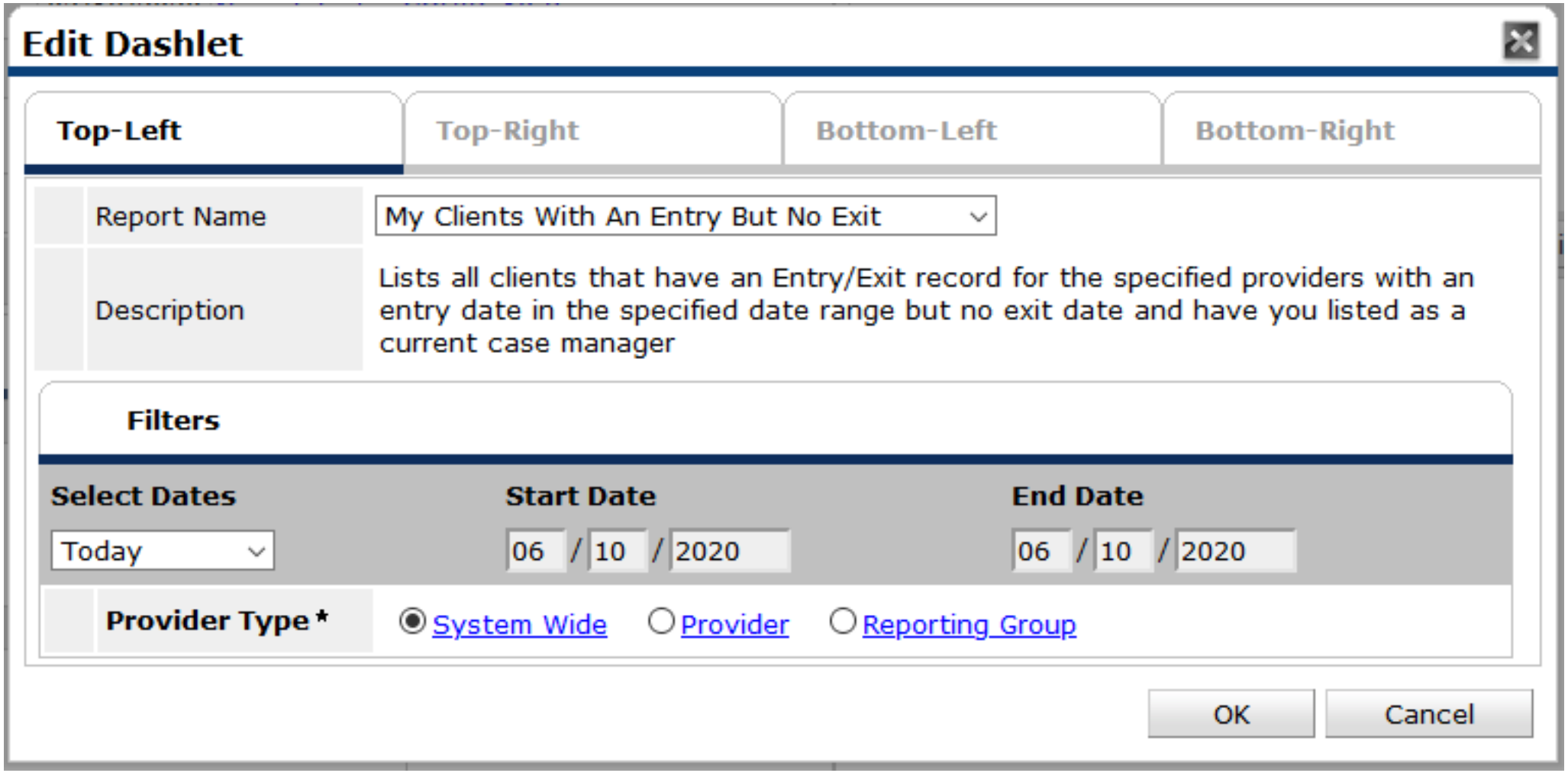
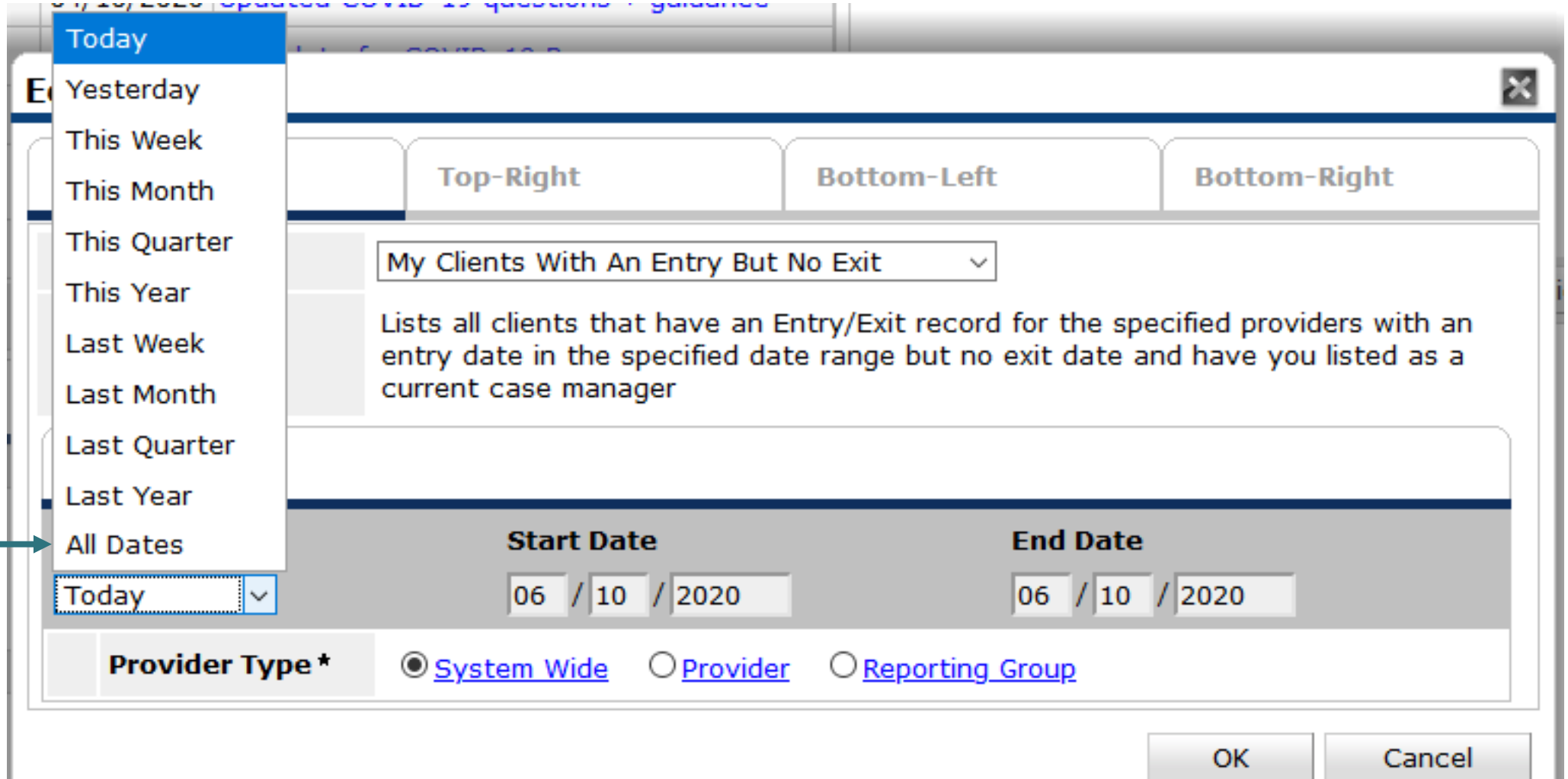
Set-Up Counts Reports

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



NCCEH

Set-Up Counts Reports



For all current clients →

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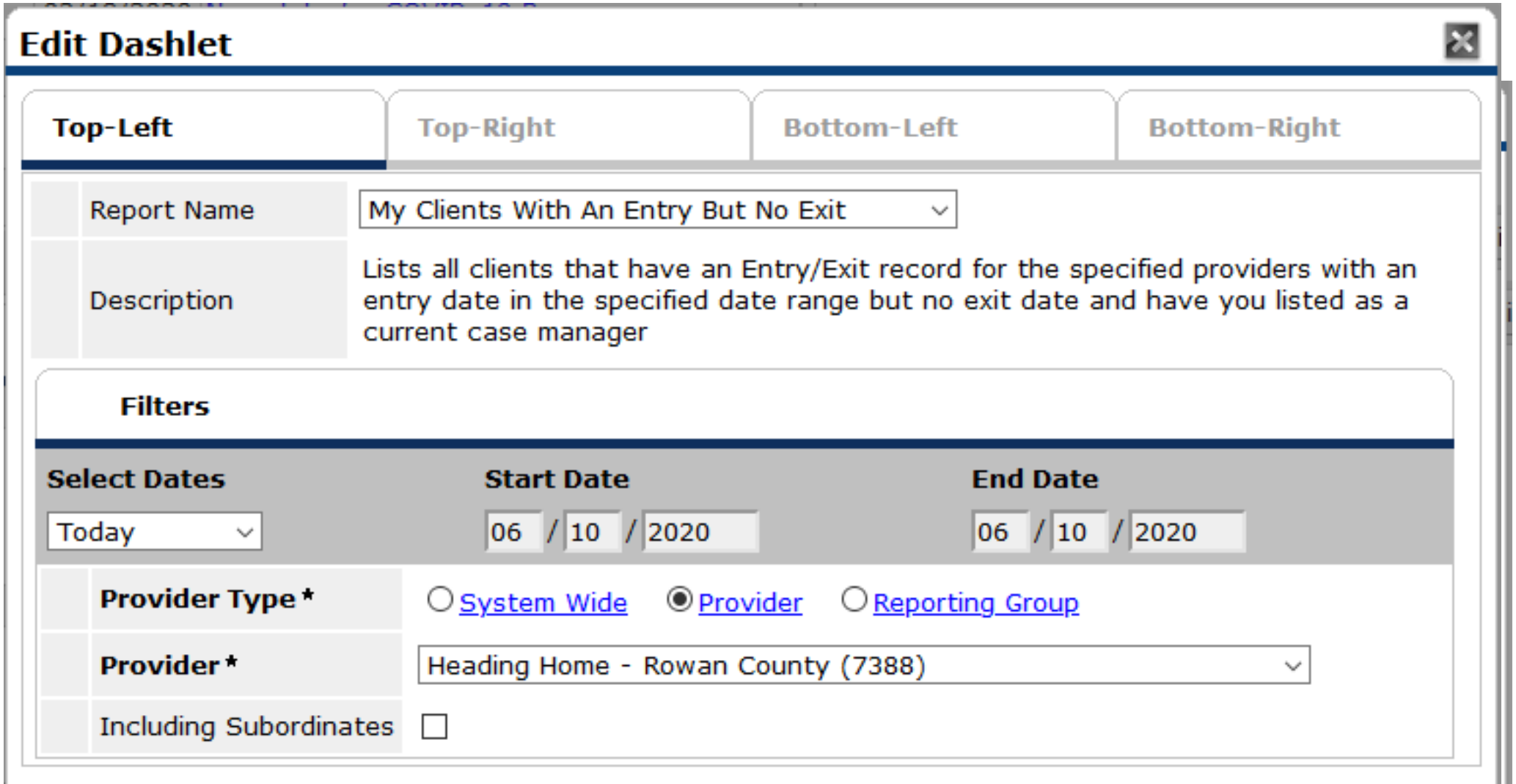
Set-Up Counts Reports

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



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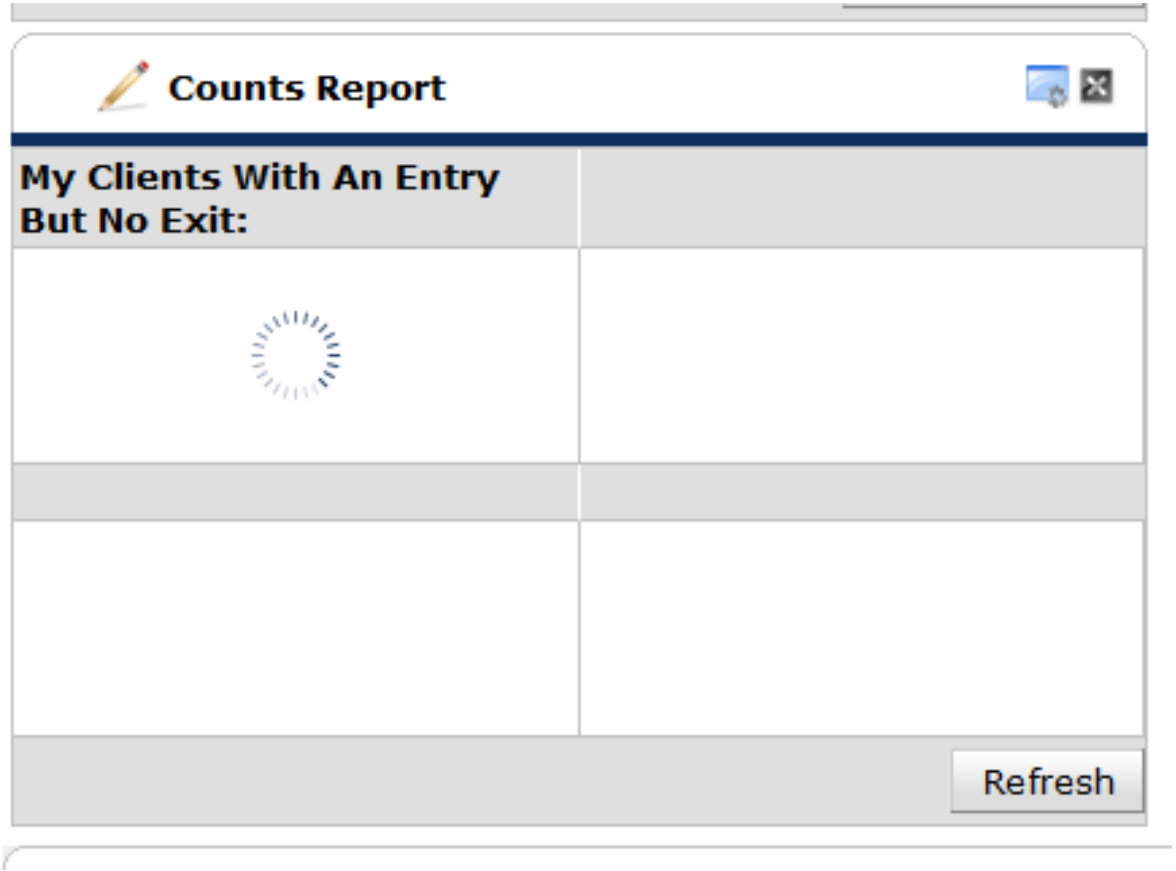
Set-Up Counts Reports

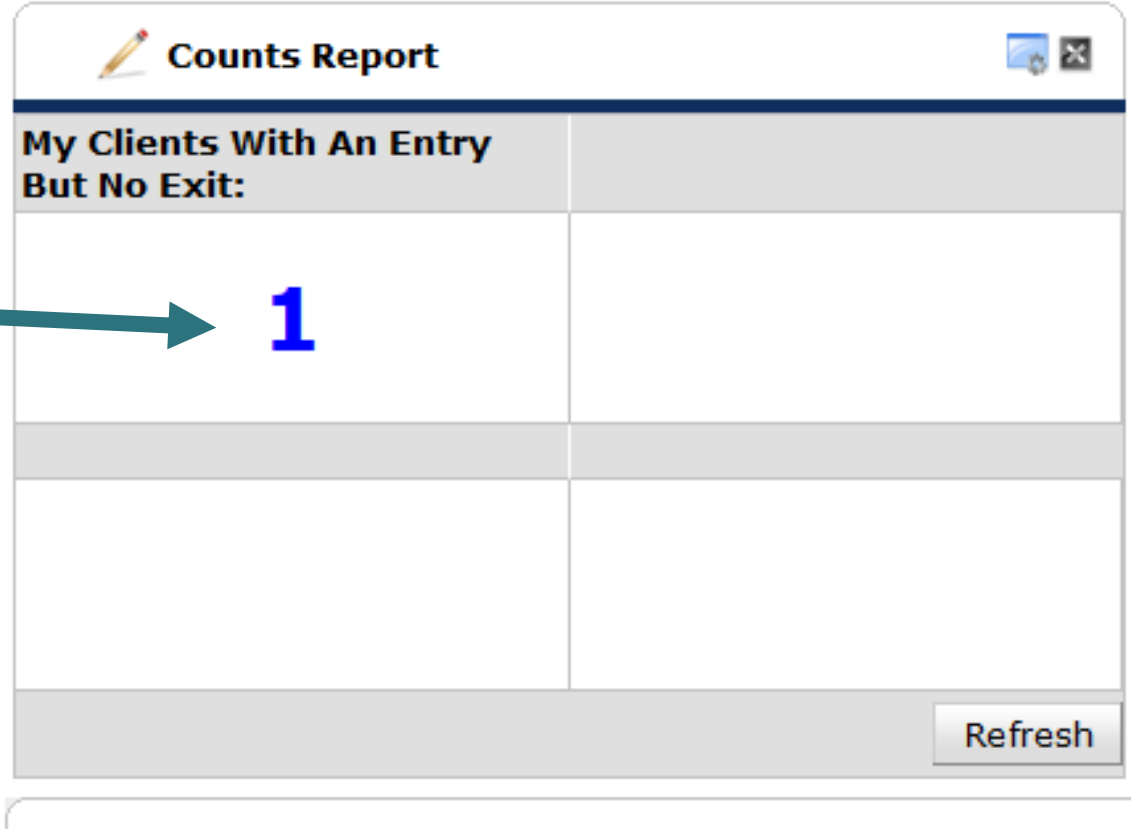
- Once a box is modified, the report will immediately pull.



Set-Up Counts Reports

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

Click on the blue numbers to see the whole list



Sometimes, when changing EDA mode or just logging in, you'll want to refresh the data

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Home Page Counts Dashlet Reports

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

- Watch for how data changes in and out of EDA mode

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Home Page Counts Dashlet Reports

Questions?

What would you like to try?

NCCEH

Follow along if you'd like!

HMIS@NCCEH training site for ServicePoint*

sp5.servicept.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.

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Notes: Where to Add

- Case Goals (June User Meeting)
- Referrals
- Service Transactions

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Notes: Preferred Format

- Date and Time
- Note
- Initials

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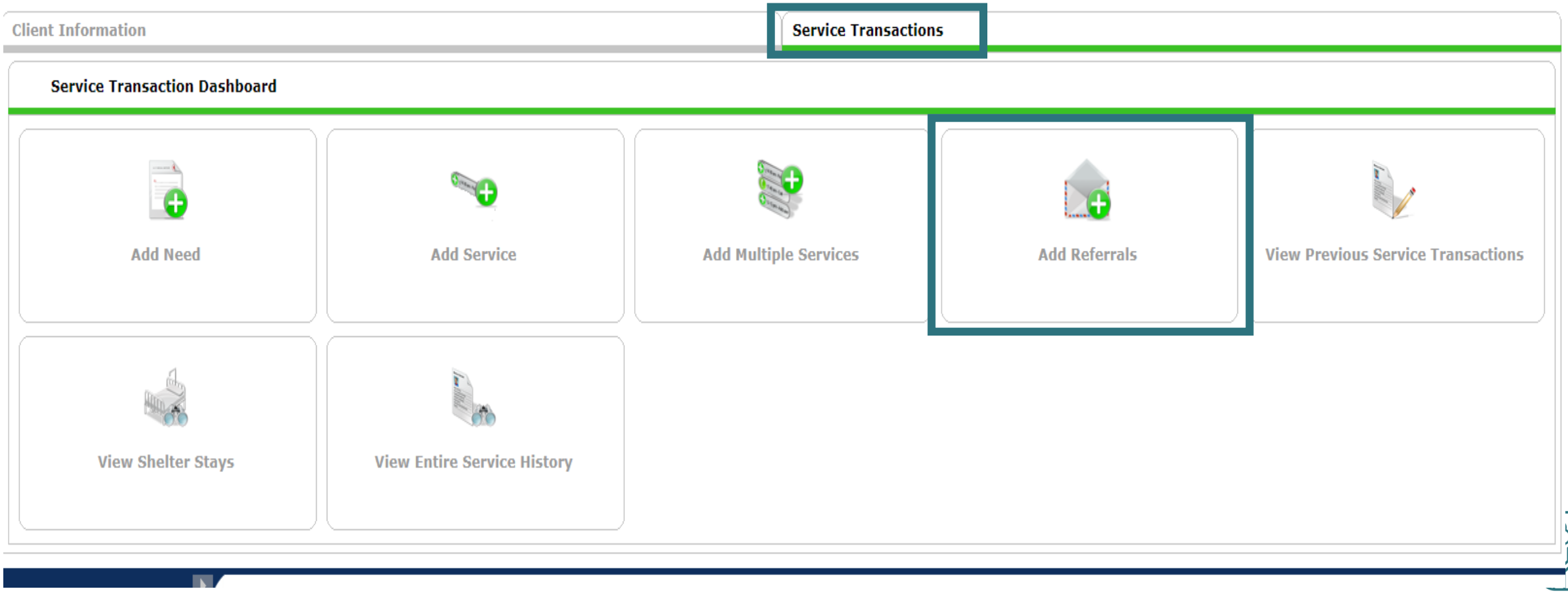
Notes: Referrals



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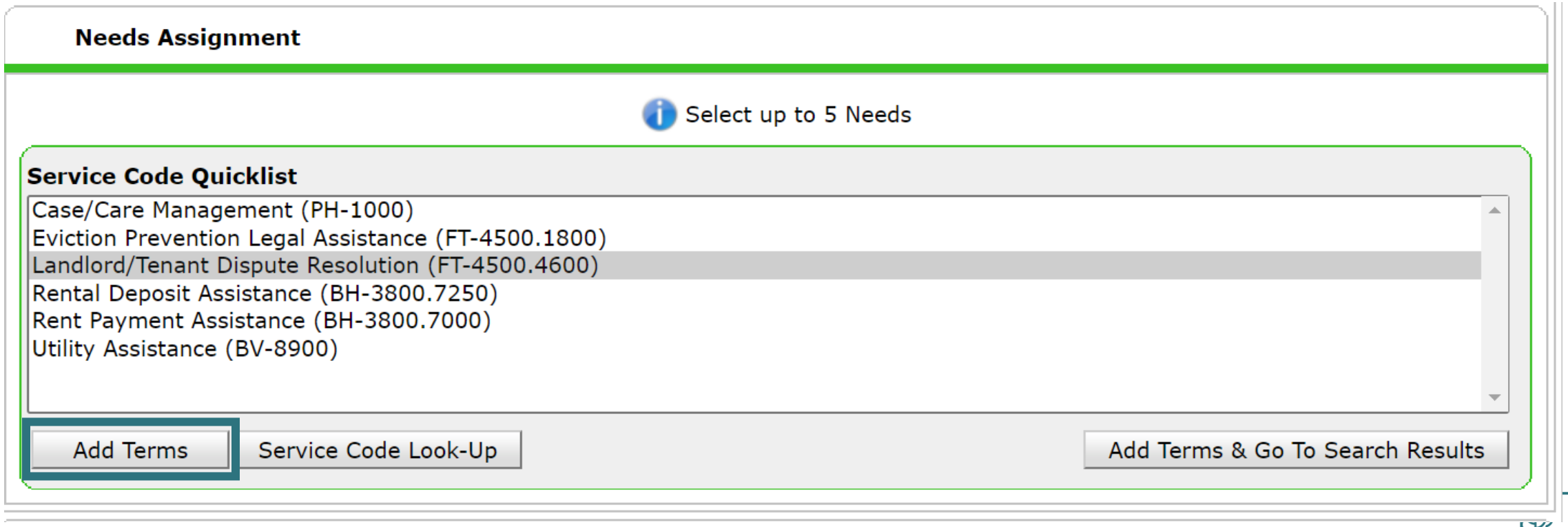
Notes: Referrals

- Select Need and Add Terms



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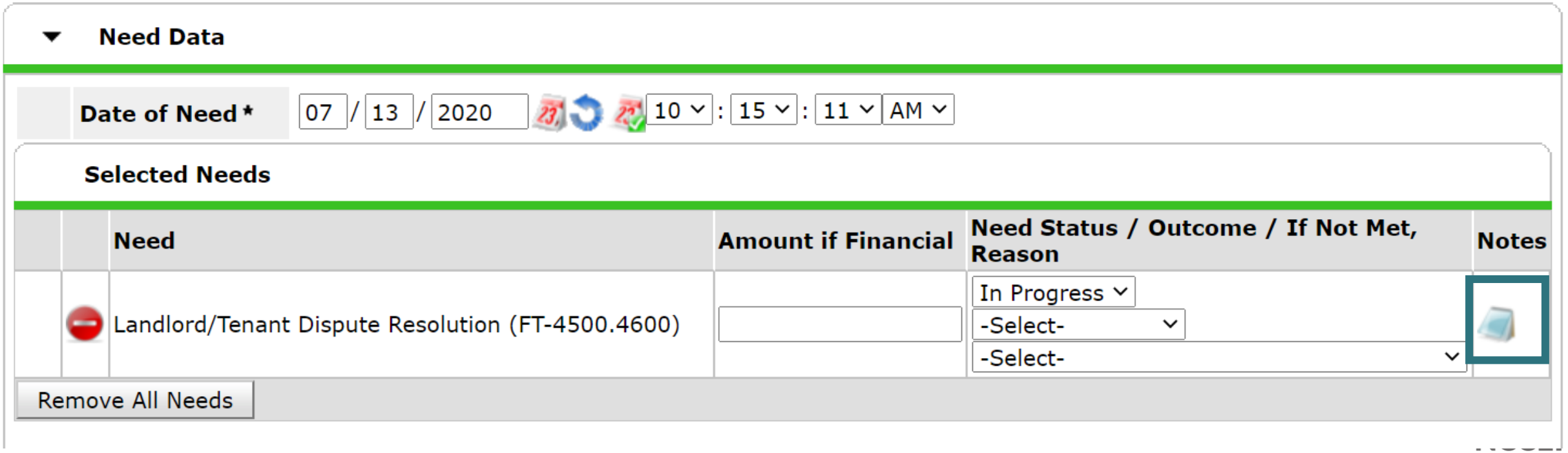
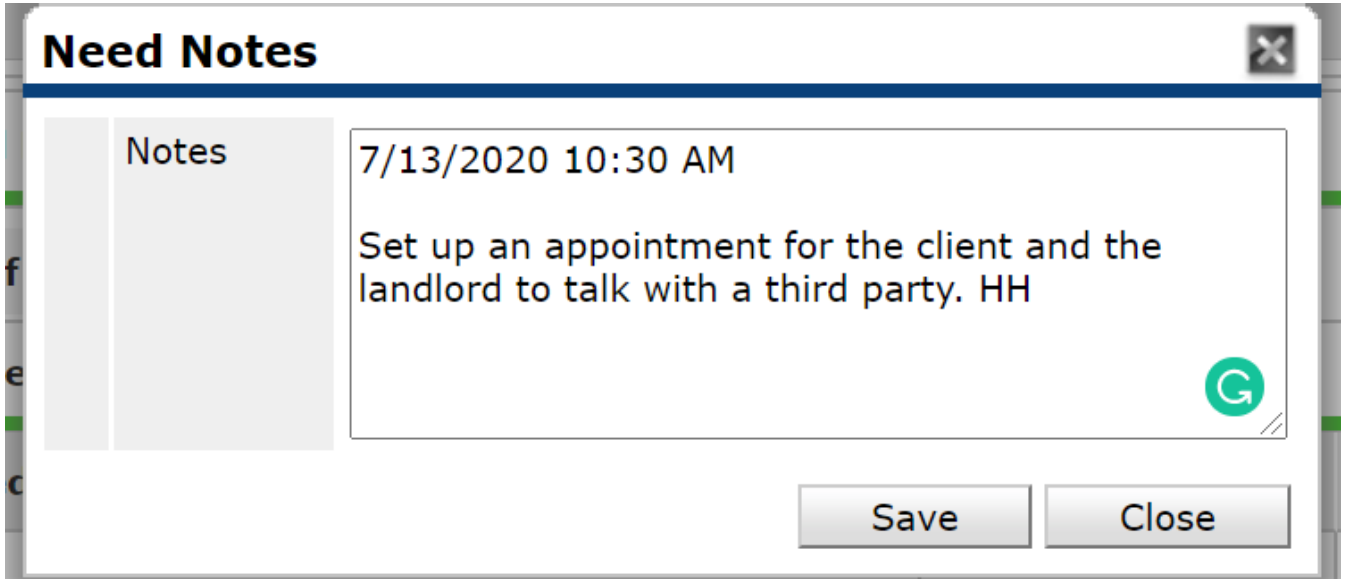
Notes: Referrals

- Scroll to the Bottom
- Select Notes
- Save All



Notes: Referrals

- Same Format: Date, Time, Note
- One Note per Referral



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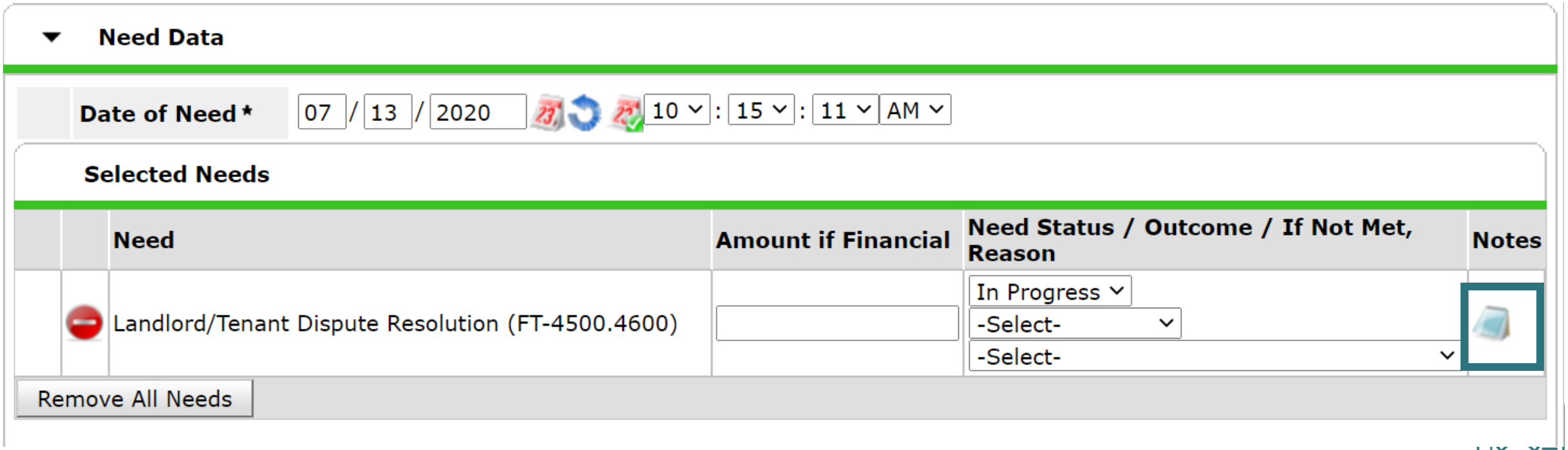
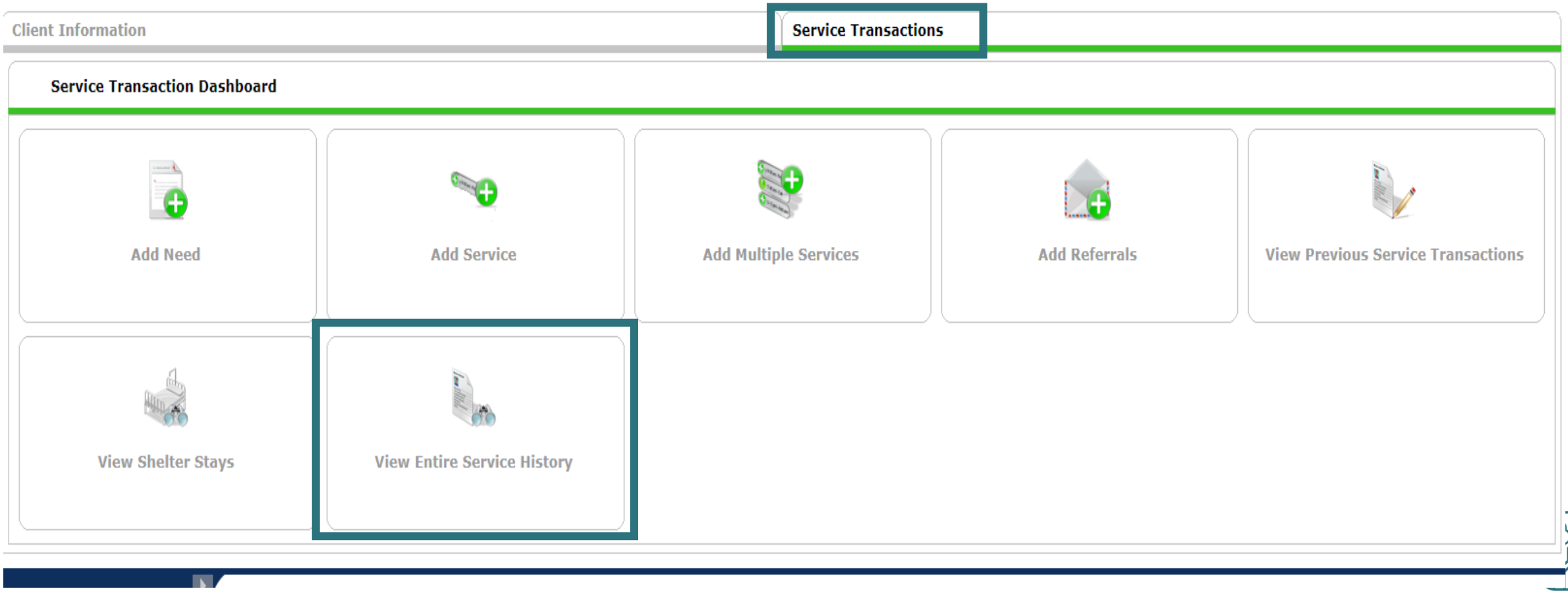
Notes: Referrals

- No Number on the Note



Notes: Referrals



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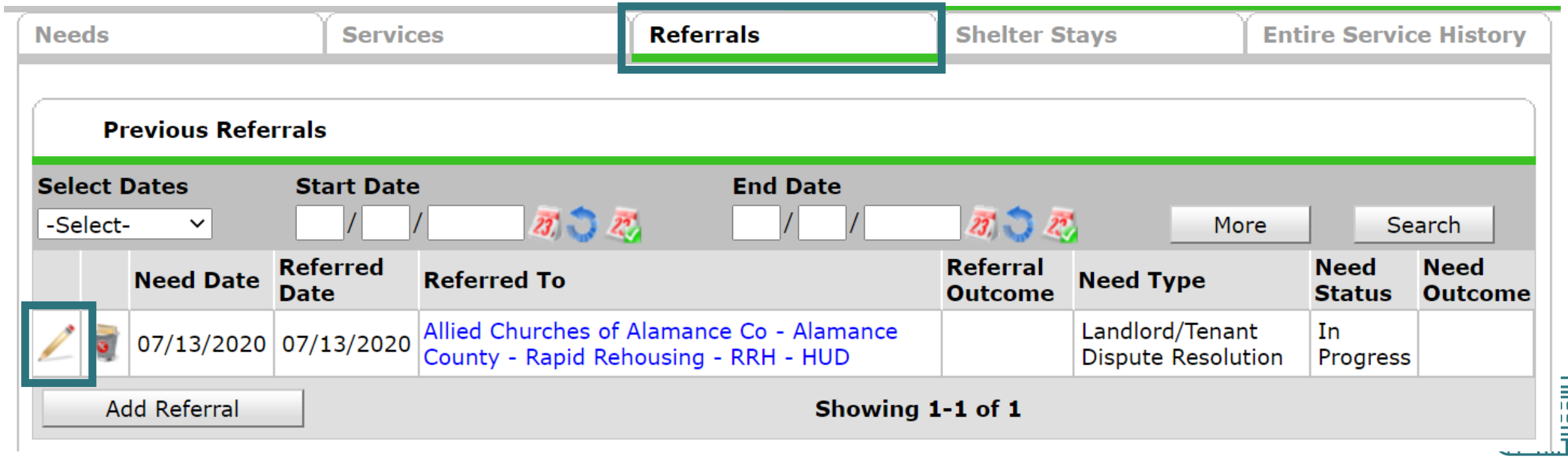
Notes: Referrals

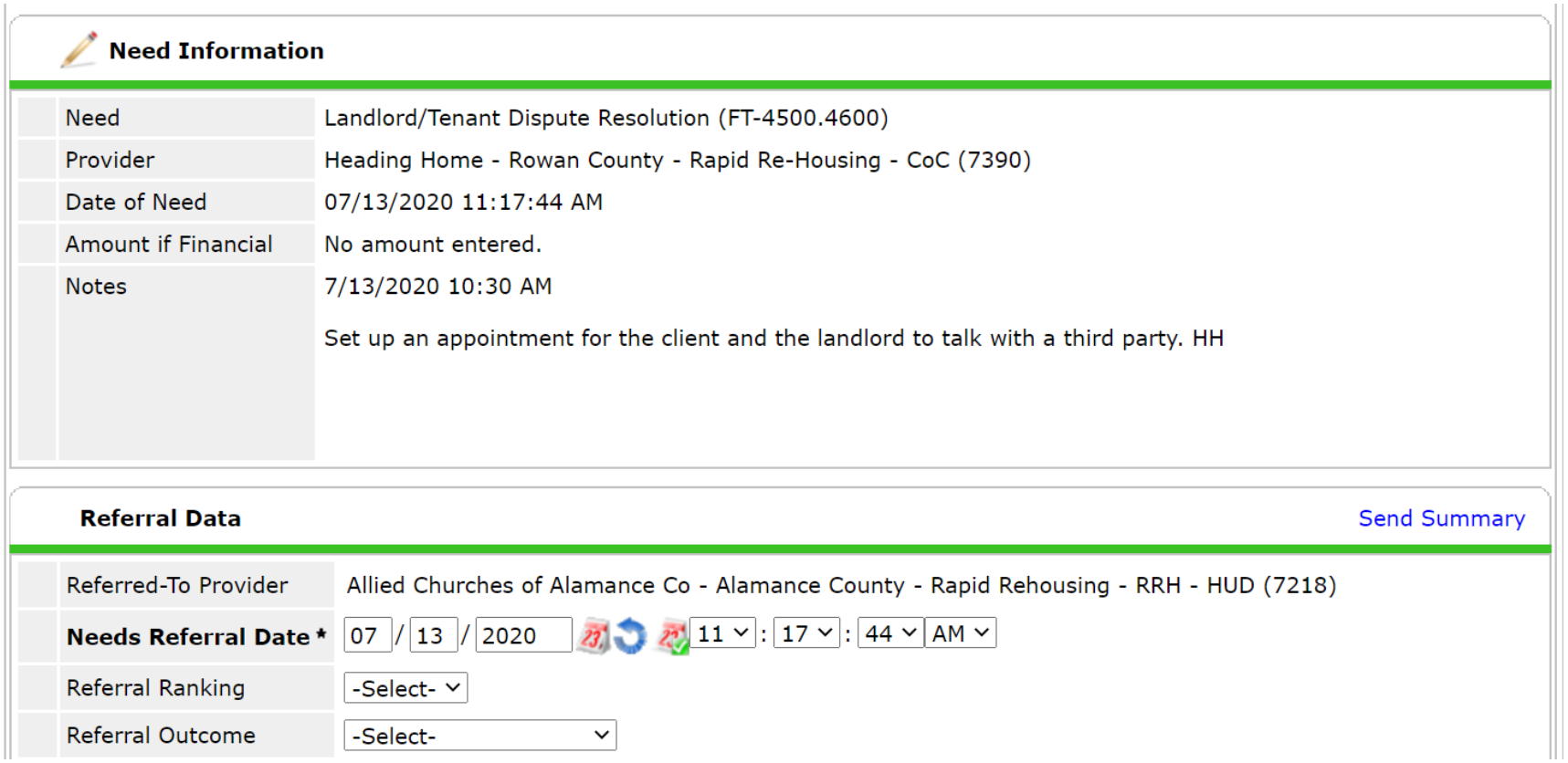
- Referrals Tab to see Referral from Agency Side



NCCEH

Notes: Referrals

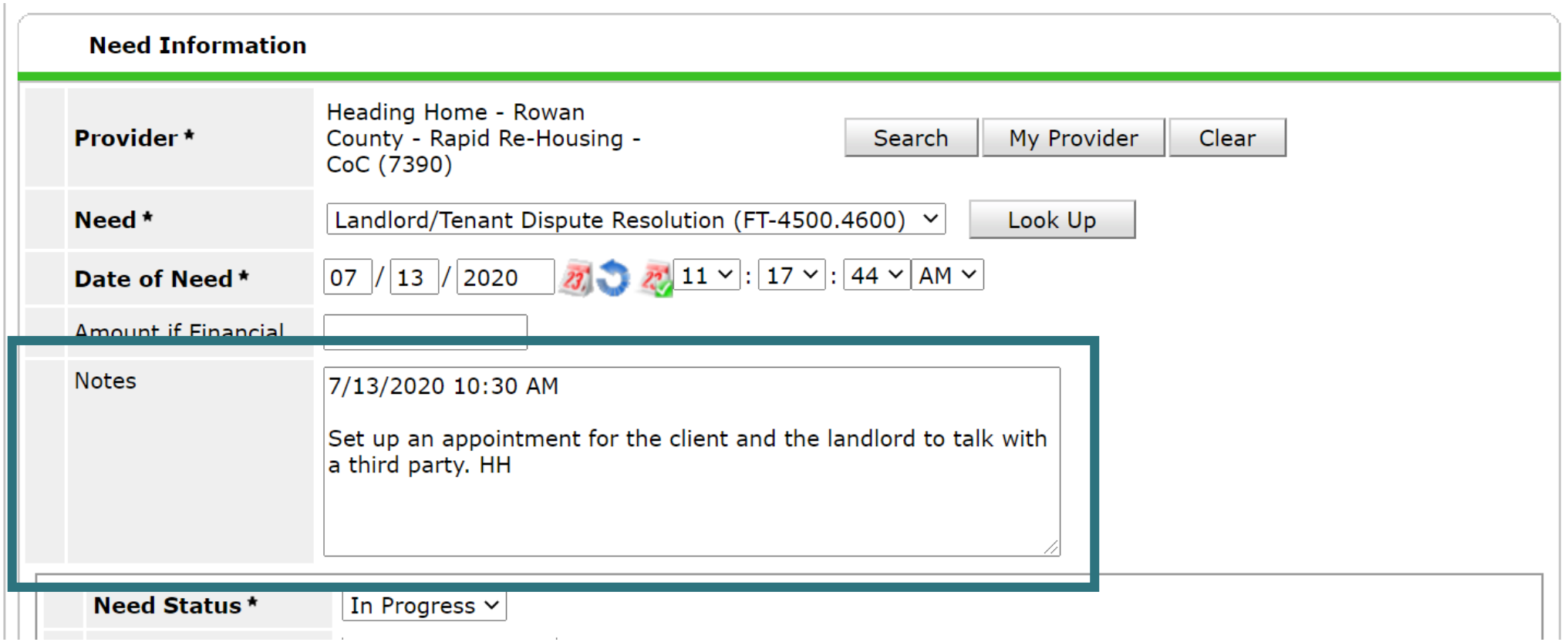
- Display set up on the Referral Tab



NCCEH

Notes: Referrals

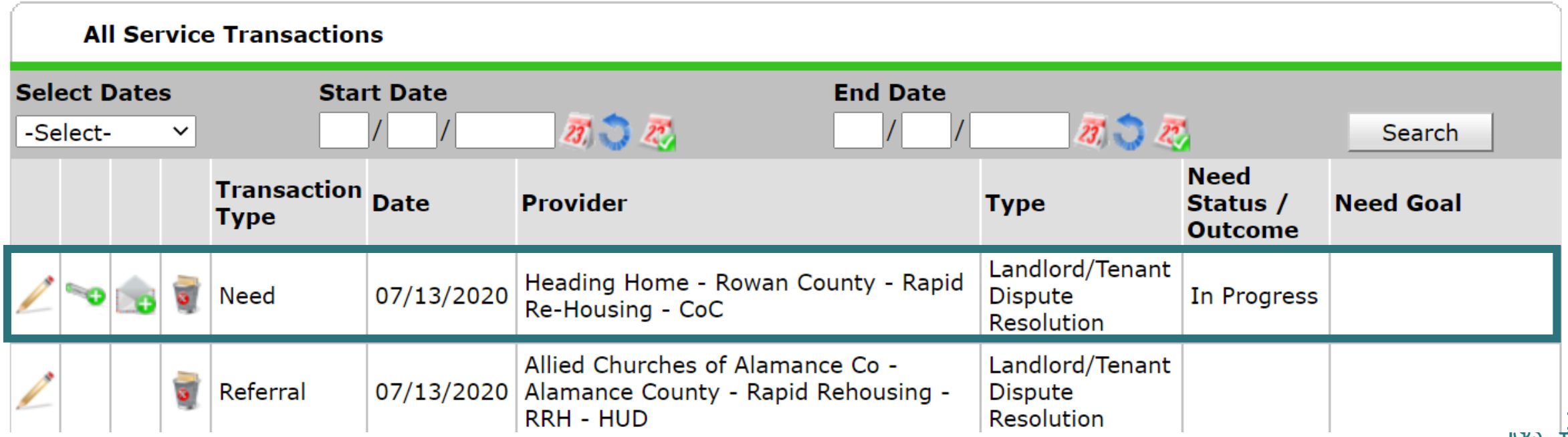
- Now editable!



NCCEH

Notes: Referrals

- To edit the note, access through the Need in All Service Transactions



All Service Transactions

Select Dates -Select-

Start Date / /

End Date / /

Search

	Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
	Need	07/13/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Landlord/Tenant Dispute Resolution	In Progress	
	Referral	07/13/2020	Allied Churches of Alamance Co - Alamance County - Rapid Rehousing - RRH - HUD	Landlord/Tenant Dispute Resolution		

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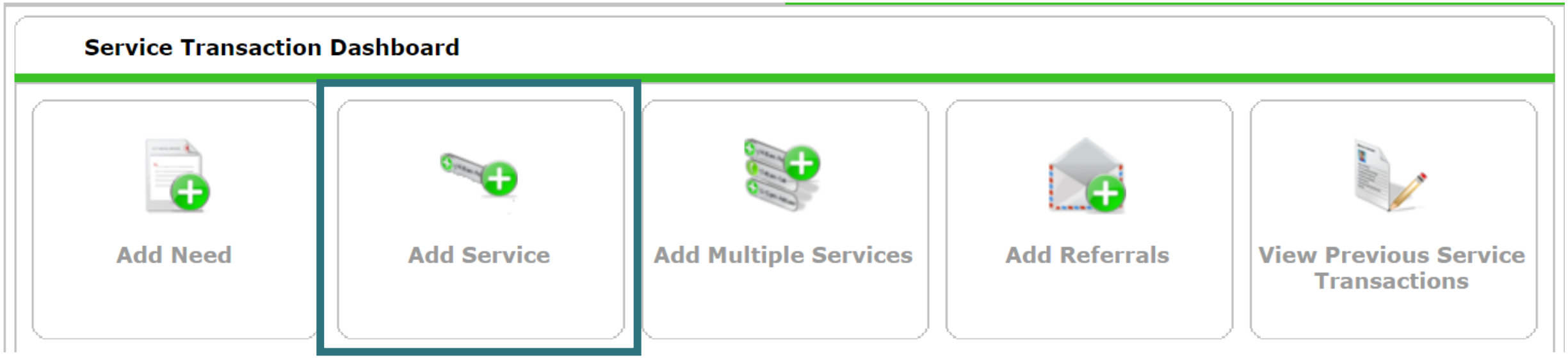
Notes: Service Transactions

- Add Need through Service Transaction Dashboard



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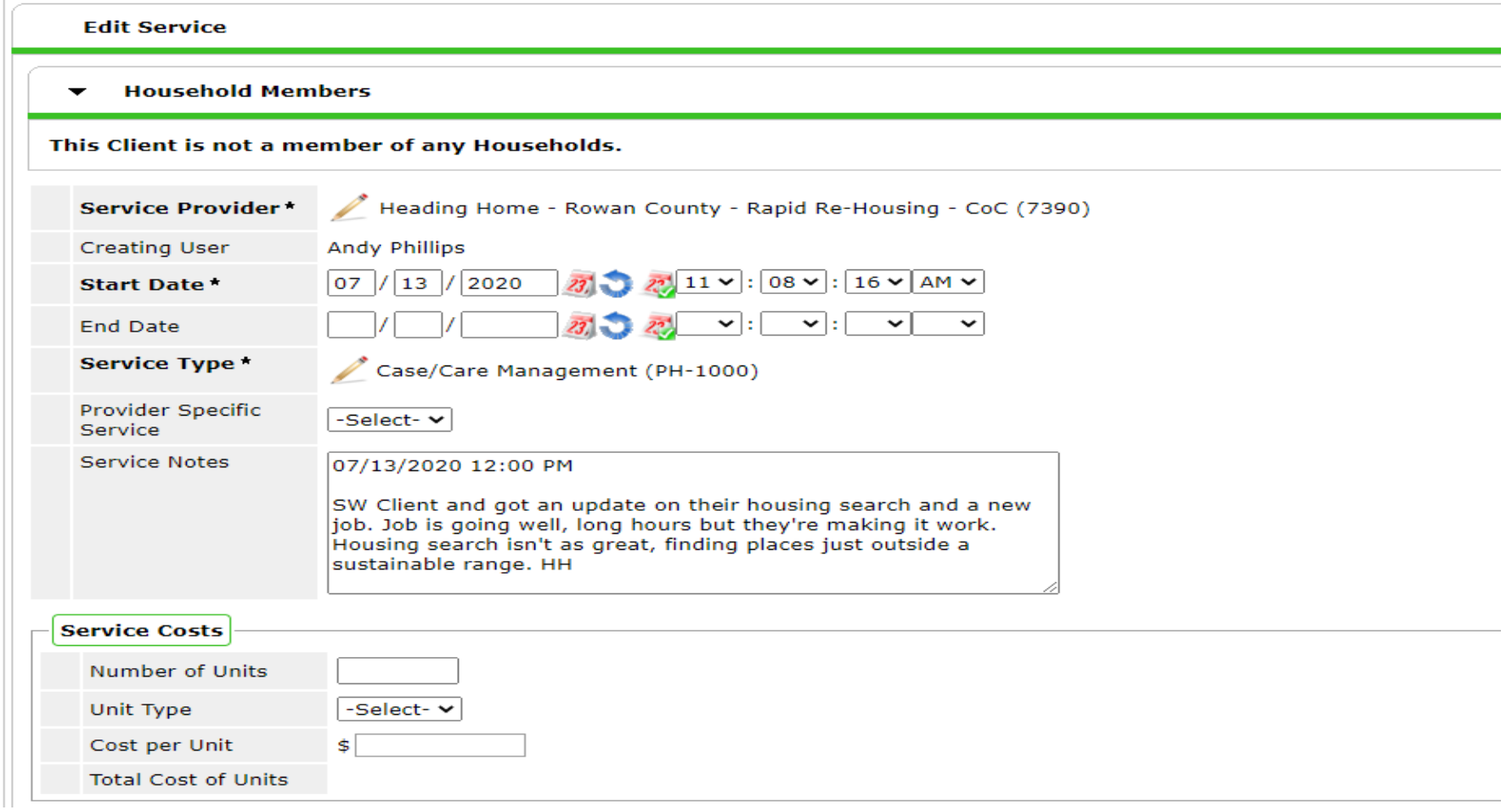
Notes: Service Transactions

- Add Note to Service Transaction



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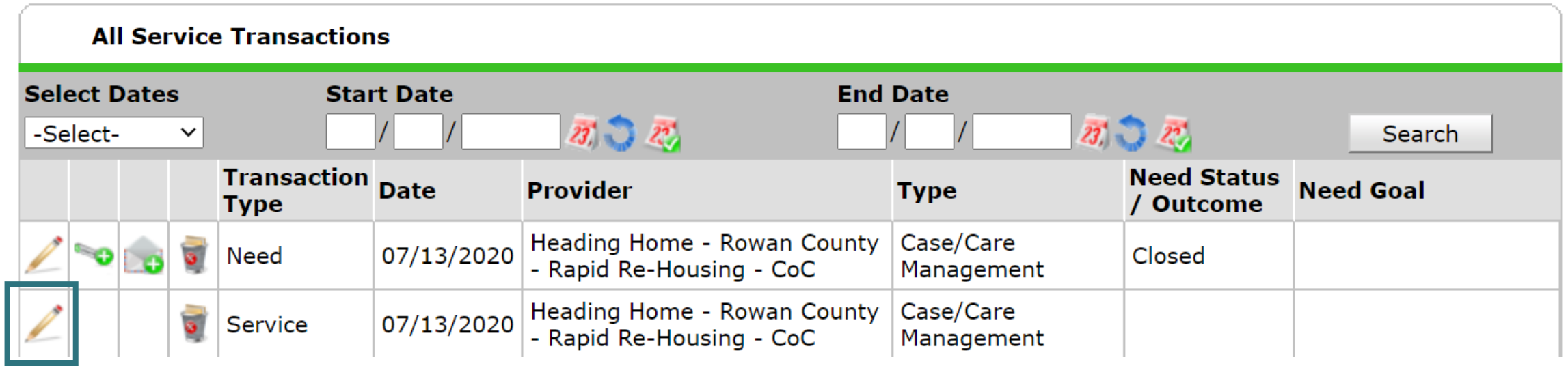
Notes: Service Transactions

- Select the Service, not the Need, to edit the note



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What's Next?

What's Next Calendar

Due	Report/Event Name
Mar 10th	NC State of Emergency for COVID-19
Mar 18th	COVID-19 Response questions in HMIS
Sept	Next HMIS Users Meeting (TBD)
Sept/Oct	Longitudinal System Analysis Report
Oct 1st	New CE Elements required in HMIS deadline
	First quarterly ESG-CV reports anticipated deadline

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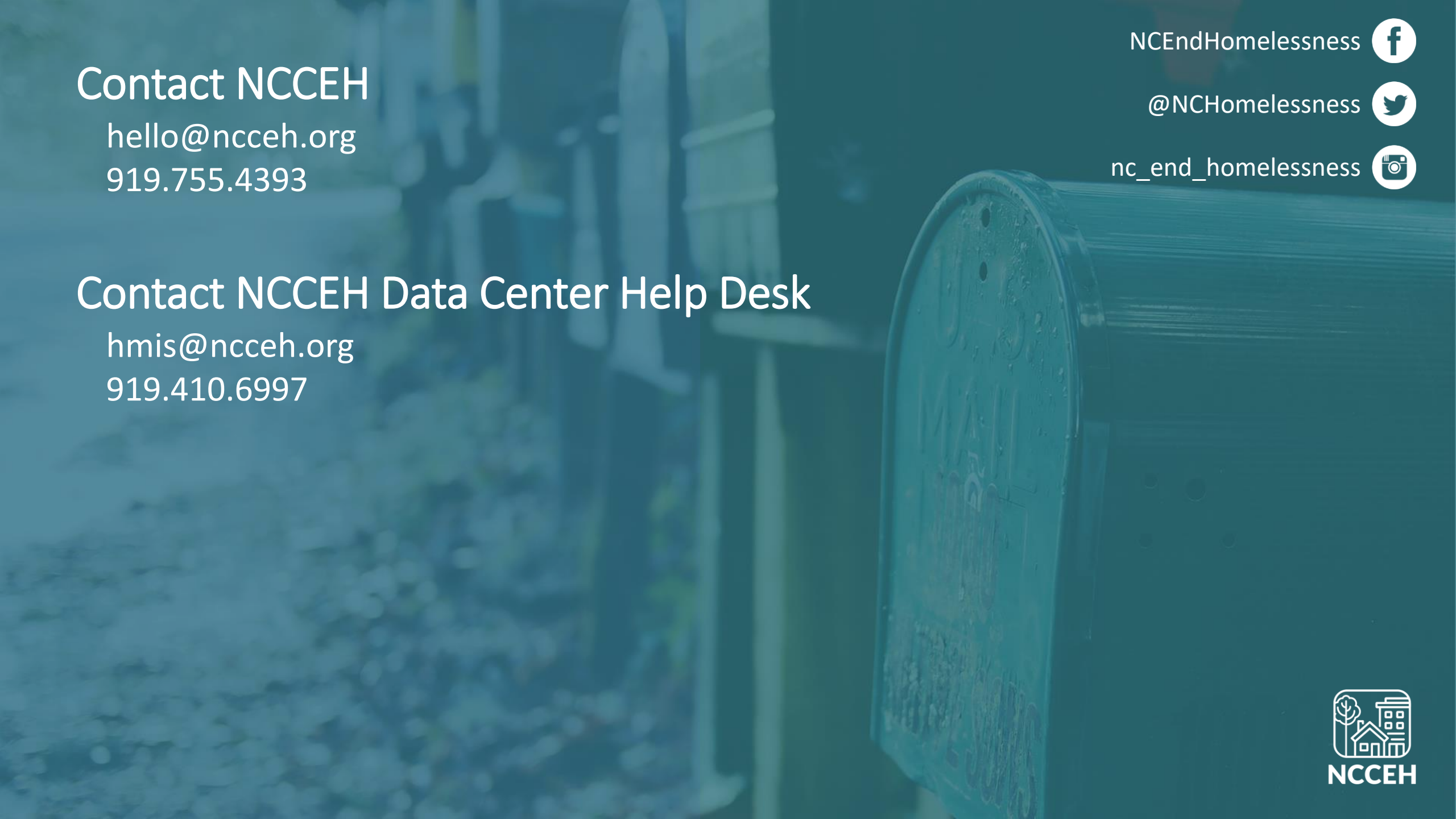

Contact NCCEH

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919.755.4393

Contact NCCEH Data Center Help Desk

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NCEndHomelessness

@NCHomelessness

nc_end_homelessness

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