HMIS@NCCEH **Orange CoC HMIS Users Meeting** 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?





Reminders Your line is muted. We will unmute the line during Q&A pauses.

The chat box is available to use anytime.





# Who is here?

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

	<b>*</b> 1	C	) ද <u>ි</u>	}	
×	PEOPLE 1/1	51			
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NC	Coalition to	End Ho	m ⊡ ⊲	$\times$ $\checkmark$	^
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ME	ETING ID: 791-	696-621			~
	Co	py Meeting	Link		
		2+ Invite	•		
C					_





**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!



### **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 1<sup>st</sup> deadline ...October?



### 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



We Love Data , `+ )

**Point in Time** 

#### What data do we have today?

- Total People Counted Experiencing Homelessness January 29<sup>th</sup>, 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)



### What does one day tell us?

People Counted in PIT, 2016-2020



#### 2020 Point in Time Count





#### Location of People Experiencing Homelessness

**PIT LIVING SITUATION 2020** 





#### People Experiencing Homelessness by Race



#### People Experiencing Homelessness by Race

NCCFH



People Experiencing Homelessness by Ethnicity



NCCEH

People Experiencing Homelessness by Ethnicity



#### PIT Across Orange: Sub-populations

Total Youth Counted by Household type



#### **PIT Across Orange: Sub-populations**

Total Veterans by Household Type



#### PIT Across Orange: Sub-populations

Total Experiencing Chronic Homelessness by Region 2020





**Housing Inventory Count** 

#### **HMIS Bed Coverage**





## Housing Inventory Count





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:

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

Client Information	Service T	ransactions
Summary Client Profile Households ROI	Entry / Exit	Case Managers



#### Track who is a client's Case Manager

• Enter Data As (EDA) mode matters!



Last Viewed Favorites	Sv	stem News	5 (18)*	Agency News (1)*		Follow Up List (0)		<b>2</b>
Home	-			3 7 (7	-0			-v <b>-</b>
ClientPoint		Date	Headline			Client ID Type	Date	Time Remaining
Clientroint		06/09/2020	ServicePoint Ver	sion Update Happening at 11 F	M			
ResourcePoint	25	00/08/2020	Tonight					
▶ FundManager	*	04/10/2020	Updated COVID-	19 questions + guidance				
ShelterPoint	*	03/18/2020	New data for CO	VID-19 Response				
Reports	*	03/09/2020	Warning: Do Not	Use Verify & Save				
▶ Admin	*	03/04/2020	ART Reports will through the wee	be unavailable Friday 3/6 at 4 kend	pm			

- 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

Client Information Service Transactions							
Summary	Client Profile	Households	ROI	intry / Exit	Case Managers	Case Plans	Assessments
	Managore						
Caser	Managers						
Na	ame Prov	vider	Phone Numbe	r	Start Date	End	Date
	o Managor			No mat	tchos		

**Decision Points:** 

• Does the case manager work with the whole household?

 Is the case manager an HMIS User?

Case Manager						
Case Manag	er - (4) Solo, Han					
Household Members						
To include Ho name	To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.					
🗌 (125413) Sing	le Parent					
⊻ <u>(4) Solo, Ha</u> r	✓ (4) Solo, Han					
<u>(501224) Sol</u>	o, Ben					
Type *	► ● <u>ServicePoint User</u> ○ <u>Me</u> ○ <u>Other</u>					
Select User *	Heading Home - Rowan County (7388)					
	-Select- ~					
Name *						
Title						

**Decision Points:** 

• Does the case manager work with the whole household?

 Is the case manager an HMIS User?

Case Manager					
Case Manag	er - (4) Solo, Han				
<ul> <li>Household Members</li> </ul>					
To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.					
🗌 (125413) Sing	(125413) Single Parent				
⊻ <u>(4) Solo, Han</u>	✓ (4) Solo, Han				
□ <u>(501224) Sol</u>	o <u>, Ben</u>				
Type *	ServicePoint User ○ Me ○ Other     Ot				
Select User *	Heading Home - Rowan County (7388)				
	-Select- V Find the User				
Name *	with their default				
Title	EDA mode				
Hue					

## Add a Case Manager: Other

**Decision Points:** 

• Does the case manager work with the whole household?

 Is the case manager an HMIS User?

Cas	se Manager		×			
	Case Manag	er - (4) Solo, Han				
	<ul> <li>Household Members</li> </ul>					
	To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.					
	(125413) Single Parent					
	✓ (4) Solo, Han					
	⊻ <u>(501224) Sol</u>	<u>o, Ben</u>				
	Type *	O <u>ServicePoint User</u> O <u>Me</u> ● <u>Other</u>				
	Name *					
	Title	Contact Info				
	Phone Number	opens up to be				
	Email Address					

Usually, you are selecting yourself!

Name & Contact Info automatically appears

Case M	Case Manager 🛛 🛛 🕅						
С	Case Manager - (4) Solo, Han						
•	Household Members						
0	To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.						
	125413) Sing	le Parent					
	( <u>4) Solo, Han</u>						
	<u>(501224) Sol</u>	<u>o, Ben</u>					
Ту	pe*	O <u>ServicePoint User</u>					
Na	me*	Helen Housing Test					
Title							
Pho	one Number						
Em	ail Address	hmis@ncceh.org					
_							

# 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

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

•	<ul> <li>Update E-mail and Phone info</li> </ul>				
•	• Save & Exit				
Use	er Profile		¢		
	Name	Helen Housing Test (7846)			
	Title				

Name		Helefi Housing Test (7840)					
	Title						
	User Name	hhousing					
	Provider	Heading Home - Rowan County (7388)					
	Role	Agency Admin					
	E-mail	hmis@ncceh.org					
	Telephone						
-[s	Settings						
Allow User to tab to Goal links within Assessments							
	Change Password	Save Save & Exit Exit					
	. ANT REDUCTS WILLIE UNAV	ANALIE FILLAV 370 AT 4 DIT TITOLOTI TI					


# Add a Case Manager

**Decision Points:** 

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

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.			
🗌 (125413) Sing	(125413) Single Parent		
∕∕ <u>(4) Solo, Ha</u>	ב		
⊠ <u>(501224) So</u>	lo, Ben		
Type *	O <u>ServicePoint User</u> ● <u>Me</u> O <u>Other</u>		
Name *	Helen Housing Test Already there	2	
Title	because of		
Phone Number	EDA mode!		
Email Address	hmis@ncceh.org		
Provider *	Heading Home - Rowan County - Rapid Re-Housing - ESG (7390) V		
Start Date *	06 / 10 / 2020 🥂 🔿 🦉		
End Date			
	Add Case Manager Cancel		

#### Case Manager Saved!

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

Release of Information: Ends 04/10/2021			-Switc	h to Another Hou	sehold Member-	✓ Submit
Client Inform	nation		Service T	ransactions		
Summary	Client Profile	Households ROI	Entry / Exit	Case Manager	s Case Plans	Assessments
6						
Case	Managers					
Case	Managers Name	Provider		Phone	Number Start D	ate End Date
	Name Helen Housing Test	<b>Provider</b> Heading Home - Rowan Co Housing - ESG	ounty - Rapid R	Phone e-	Number Start D	ate End Date

## Let's see this in action

HMIS@NCCEH training site for ServicePoint\* <u>sp5.servicept.com/hmisncceh\_training</u>

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



**Counts Reports** 

## Home Page Counts Dashlet Reports

Pros:

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

Cons:

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



• Open the black arrow for Customize Home Page Dashboard

📌 Home > Home Page	🕏 Home > Home Page Dashboard						<b>— () ★ (</b> ?
Last Viewed Favorites     Home	System News	; (18)	Agency News (1)	-	Follow Up List (0)	)	<b>X</b>
ClientPoint	Date	Headline			Client ID Type	Date	Time Remaining
ResourcePoint	06/08/2020	ServicePoint PM Tonight	Version Update Happening a	t 11			
▶ FundManager	04/10/2020	Updated COV	ID-19 questions + guidance				
ShelterPoint	03/18/2020	New data for	COVID-19 Response				
Reports	03/09/2020	Warning: Do N	lot Use Verify & Save				
▶ Admin	03/04/2020	ART Reports v 4 pm through	vill be unavailable Friday 3/0 the weekend	5 at			
Logout	02/17/2020	ART failed this	s morning (Updated 2.17)				
			View Al				View All
	Custom	ize Home Par	ie Dashboard		1		

- Look for Add Counts Report
- Options may vary





System News	s <b>(18)</b>	Agency News	(1)	<b>6</b>	Follow Up List (0	)	<b>X</b>
Date	Headline				Client ID Type	Date	Time Remaining
06/08/2020	ServicePoint V PM Tonight	/ersion Update Ha	ppening	g at 11			
04/10/2020	Updated COVI	Updated COVID-19 questions + guidance					
03/18/2020	New data for COVID-19 Response						
03/09/2020	Warning: Do Not Use Verify & Save						
03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend			3/6 at			
02/17/2020	020 ART failed this morning (Updated 2.17)		)				
	View All			All			View All
Counts	Report			<b>i</b>			

Click the – Pencil!

🖉 Counts Report	
Top-Left	Top-Right
Bottom-Left	Bottom-Right
	Refresh



Edit Dashlet			×
Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	-Select-	~	
Description	N/A		
	A Counts Report is not	currently designated for th	OK Cancel



• Standard list to choose from

dit Dashlet			×
Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	-Select-	~	
Description	Clients With Expiring ROIs	^	
	Clients With No Goals Set		
	Clients With No Recent Case Activ	/ity	
0	A Clients With No Recent Case Note	pr this loca	ation.
	Clients With No Recent Entries		
	Clients With No Shelter Stays		
	Clients With NULL UDEs		OK Cancel
	Clients With Outstanding Referral	s and a second sec	
	Clients With Recent Exits		
	Clients With Unserved Needs		
	Incoming Closed Referrals		

• Many use Case Manager tab to find "My Clients"

Edit Dashlet			×
Top-Left	Top-Right Bottom-Le	ft	Bottom-Right
Report Name	Select-	~	
Description	My Clients With No Goals Set		
	My Clients With No Recent Case Activity		
	My Clients With No Recent Case Note		
<b>V</b>	My Clients With No Recent Entries		or this location.
	My Clients With No Shelter Stays		
	My Clients With NULL UDEs		OV Canaal
	My Clients With Outstanding Referrals		OK Cancel
	My Clients With Recent Exits		
	My Clients With Unserved Needs		
	Outgoing Closed Referrals		
	Outraine Defensele		

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

Edit Dashlet			×
Top-Left	Top-Right	Bottom-Left Bottom-Right	
Report Name	My Clients With An Entry But N	o Exit 🗸	
Description	Lists all clients that have an En entry date in the specified date current case manager	try/Exit record for the specified providers wi range but no exit date and have you listed	th an as a
Filters			
Select Dates	Start Date	End Date	
Today ~	06 / 10 / 2020	06 / 10 / 2020	
Provider Type *	● <u>System Wide</u> O <u>Provider</u>	O <u>Reporting Group</u>	
		ОК С	ancel



For all

current

clients

E( Yesterday			
This Week This Month	Top-Right Bo	ottom-Left Bottom-Rig	jht
This Quarter This Year Last Week Last Month	My Clients With An Entry But No E Lists all clients that have an Entry, entry date in the specified date rate current case manager	xit v /Exit record for the specified providers nge but no exit date and have you lis	s with an ted as a
Last Quarter Last Year All Dates	Start Date	End Date	
Today V Provider Type *	06 / 10 / 2020 ● <u>System Wide</u> ○ <u>Provider</u> ○	06 / 10 / 2020	

NCCEH

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

Edit	t Dashlet			X			
Тс	op-Left	Top-Right	Bottom-Left	Bottom-Right			
	Report Name	My Clients With An Entry But No Exit V					
	Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager					
	Filters						
Se	elect Dates	Start Date	End Date				
Т	oday 🗸	06 / 10 / 2020	06 / 10	/ 2020			
	Provider Type *	○ <u>System Wide</u> ● <u>Prov</u>	vider O <u>Reporting Group</u>				
	Provider *	Heading Home - Rowan C	County (7388)	~			
	Including Subordinat	es 🗌					



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





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



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



#### Home Page Counts Dashlet Reports

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Good options to consider:

 $\odot$  See when new Referrals are recorded

o See when a follow-up is scheduled for this day/week/month

 $\odot$  See info about your clients

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



#### Home Page Counts Dashlet Reports

Questions?

What would you like to try?



# Follow along if you'd like!

HMIS@NCCEH training site for ServicePoint\* <a href="mailto:sp5.servicept.com/hmisncceh\_training">sp5.servicept.com/hmisncceh\_training</a>

\*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.



#### Notes: Where to Add

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



## **Notes: Preferred Format**

- Date and Time
- Note
- Initials

This Client is not a member of any Households.				
Provider *	Heading Home - Rowan County - Rapid Re-Housing - CoC (7390) 🗸			
Case Manager	Helen Housing Test 🗸			
Note Date*	07 / 13 / 2020 🧖 🔿 🦉			
Note *	07/13/2020 9:50 AM			
	Client came into today to talk about their progress in class, they are really enjoying it and find it to be a good challenge. HH			





Select Need and Add Terms

Needs Assignment	
🚺 Selec	t up to 5 Needs
Service Code Quicklist	
Case/Care Management (PH-1000)	
viction Prevention Legal Assistance (FT-4500.1800)	
andlord/lenant Dispute Resolution (FI-4500.4600)	
Rent Payment Assistance (BH-3800.7200)	
Itility Assistance (BV-8900)	
Add Terms Service Code Look-Up	Add Terms & Go To Search Results

NCC

- Scroll to the Bottom
- Select Notes
- Save All

•	▼ Need Data							
	Da	ite of Need * 07 / 13 / 2020 🧖 🔿 🧖 10 ~	: 15 ~: 11 ~ AM ~					
	Selected Needs							
		Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes			
	•	Landlord/Tenant Dispute Resolution (FT-4500.4600)		In Progress V -Select- V				
Re	Remove All Needs							

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

Need Note	5 🛛 🕅
Notes	7/13/2020 10:30 AM
f	Set up an appointment for the client and the landlord to talk with a third party. HH
e	G
c	Save Close



• No Number on the Note

•	Need Data			
Da	ate of Need * 07 / 13 / 2020 🧃 🔿 🤯 10 ~	: 15 ~: 11 ~ AM ~		
S	elected Needs			
	Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
٢	Landlord/Tenant Dispute Resolution (FT-4500.4600)		In Progress V -Select- V	
Remo	ve All Needs		-Select-	•
				Uinin NCCF



• Referrals Tab to see Referral from Agency Side

Needs		Servio	Services		errals Shelte		helter Stays		ce History
Pr	Previous Referrals								
Select I -Select-	Dates - ~	Start Date	s / <b>27, 🔿 2</b>	8	End Date	<b>1</b> , 🔿 2,	Moi	re S	earch
	Need Date	Referred Date	Referred To			Referral Outcome	Need Type	Need Status	Need Outcome
2 07/13/2020 07/13/2020 Allied Churches of County - Rapid Ref		Alamance housing -	e Co - Alamance RRH - HUD		Landlord/Tenan Dispute Resolut	t In tion Progress	5		
Add Referral Showing 1-1 of 1									



• Display set up on the Referral Tab

🖉 Need Information	1			
Need Provider	Landlord/Tenant Dispute Resolution (FT-4500.4600) Heading Home - Rowan County - Rapid Re-Housing - CoC (7390)			
Date of Need07/13/2020 11:17:44 AMAmount if FinancialNo amount entered.				
Notes	7/13/2020 10:30 AM Set up an appointment for the client and the landlord to talk with a third party. HH			
Referral Data		Send Summary		
Referred-To Provider Needs Referral Date	Allied Churches of Alamance Co - Alamance County - Rapid Rehousing - RRH - HUD (7218) • 07 / 13 / 2020			
Referral Ranking Referral Outcome	-Select- V			



#### • Now editable!

Need Information	
Provider *	Heading Home - Rowan County - Rapid Re-Housing - Search My Provider Clear CoC (7390)
Need *	Landlord/Tenant Dispute Resolution (FT-4500.4600) V Look Up
Date of Need *	07 / 13 / 2020 🧖 🔿 💐 11 🗸 : 17 🗸 : 44 🗸 AM 🗸
Amount if Financial	
Notes	7/13/2020 10:30 AM Set up an appointment for the client and the landlord to talk with a third party. HH
Need Status *	In Progress ¥



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

All Service Transactions								
Select Dates		Star	rt Date	End Date	<b>B</b> , 🔾 Z	5	Search	
		Transaction Type	Date	Provider	Туре	Need Status / Outcome	Need Goal	
/ 🛰 📩	0	Need	07/13/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Landlord/Tenant Dispute Resolution	In Progress		
2	1	Referral	07/13/2020	Allied Churches of Alamance Co - Alamance County - Rapid Rehousing - RRH - HUD	Landlord/Tenant Dispute Resolution			

#### **Notes: Service Transactions**

• Add Need through Service Transaction Dashboard





#### Notes: Service Transactions

• Add Note to Service Transaction

Edit Service						
	✓ Household Members					
This Client is not a me	ember of any Households.					
Service Provider*	🧪 Heading Home - Rowan County - Rapid Re-Housing - CoC (7390)					
Creating User	Andy Phillips					
Start Date *	07 / 13 / 2020 🔊 🔊 11 🗸 : 08 🗸 : 16 🗸 AM 🗸					
End Date						
Service Type *	Zase/Care Management (PH-1000)					
Provider Specific Service	-Select- 🗸					
Service Notes	07/13/2020 12:00 PM SW Client and got an update on their housing search and a new job. Job is going well, long hours but they're making it work. Housing search isn't as great, finding places just outside a sustainable range. HH					
Service Costs						
Number of Units						
Unit Type	-Select- 🗸					
Cost per Unit	\$					
Total Cost of Units						



#### **Notes: Service Transactions**

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

All Service Transactions							
Select Dates Start Date End Date							
-Select-	~		//	27, 🕽 🎝	//	T, 🔾 Z	Search
		Transaction Type	Date	Provider	Туре	Need Status / Outcome	Need Goal
<u>/</u> ~ 📩	0	Need	07/13/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management	Closed	
2	5	Service	07/13/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management		



Hat's Next?

## What's Next Calendar

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


## Contact NCCEH

hello@ncceh.org 919.755.4393



@NCHomelessness

nc\_end\_homelessness 🐻

## Contact NCCEH Data Center Help Desk

hmis@ncceh.org 919.410.6997

