HMIS Forum 1st Quarter

March 23, 2023
HMIS TEAM

Ana Rausch – VP of Program Operations
Heady Cassidy – Program Operations Coordinator
Scot More – Senior Associate/Homeless Court Administrator
Erol Fetahagic – Director of Analytics & Evaluation
Karen Flores – Specialist Analytics & Evaluation
Yvette Fuentes – Associate Reporting & Evaluation
Kelita Beechum – Data System Manager
Agnes Asigbey – Manager of Analytics and Evaluation
Lindsey Grubbs – Specialist Training & Support
RaSara Rodriguez – HMIS Training & Support Specialist
• Welcome & Introductions
• System Performance Measures
• HMIS Sys Admin Webinar Updates
• HMIS and Performance Site Visits
• HMIS Data Support
• Data Quality
• Referrals Overview
• HMIS Support Committee
• Training Information
• Q&A
• Mini Documentary on Houston’s Approach to Homelessness
Welcome our newest HMIS Participating Agencies

NestQuest Houston Inc
D Hope Miller Foundation
What are the SPMs?

- The System Performance Measures is an annual HUD report that includes key indicators of how a Continuum of Care is performing towards making homelessness rare, brief, and non-recurring.
- Reporting is based on the Federal fiscal year; FY2022 covers October 2021-September 2022
- Other annual HUD system reports:
  - Point-In-Time Count (PIT)
  - Housing Inventory Count (HIC)
  - Longitudinal Systems Analysis (LSA)
Which projects are included in the SPMs?

- SPMs are based on the data from the following project types, regardless of funding:
  - Emergency Shelter
  - Transitional Housing
  - Safe Haven
  - Rapid Re-Housing
  - Permanent Supportive Housing
  - Other Permanent Housing

- The Income Growth measure only includes CoC-funded projects

- Exits to PH include Street Outreach projects, regardless of funding type

- Domestic Violence projects do not participate in the HMIS and are not reported in the SPMs
## SPMs at a Glance #1

<table>
<thead>
<tr>
<th>Measure</th>
<th>Goal</th>
<th>Change</th>
<th>Percentage change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Annual HMIS Counts</td>
<td>Reduce the annual number of people experiencing homelessness</td>
<td><img src="chart1.png" alt="Chart" /></td>
<td>16% increase</td>
</tr>
<tr>
<td>Length of Time People Remain Homeless</td>
<td>Reduce the average length of time people remain homeless from the time people seek services</td>
<td><img src="chart2.png" alt="Chart" /></td>
<td>3% decrease</td>
</tr>
<tr>
<td>Returns to Homelessness</td>
<td>Reduce the percent of persons who return to homelessness in 2 years</td>
<td><img src="chart3.png" alt="Chart" /></td>
<td>5% decrease</td>
</tr>
</tbody>
</table>

*Full report is posted at: homelesshouston.org > The Way Home > Performance Measurement*
## SPMs at a Glance #2

<table>
<thead>
<tr>
<th>Measure</th>
<th>Goal</th>
<th>Change</th>
<th>Percentage change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Newly Homeless</td>
<td>Reduce the number of persons who become homeless for the first time</td>
<td>Newly Homeless:</td>
<td>5% decrease</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6848</td>
<td>7211</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2021: 6848</td>
<td>2022: 7211</td>
</tr>
<tr>
<td>Housing Placements and Retention</td>
<td>Increase the number of persons with successful exits to or retention of permanent housing</td>
<td>Exits/Retention:</td>
<td>1% decrease</td>
</tr>
<tr>
<td></td>
<td></td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2021: 57%</td>
<td>2022: 58%</td>
</tr>
<tr>
<td>Income growth</td>
<td>Increase the percent of adults served who increased their income</td>
<td>Adults with Income:</td>
<td>4% increase</td>
</tr>
<tr>
<td></td>
<td></td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2021: 36%</td>
<td>2022: 32%</td>
</tr>
</tbody>
</table>

- Full report is posted at: [homelesshouston.org > The Way Home > Performance Measurement](http://homelesshouston.org)
Have you seen TWH Performance Dashboards?
https://homelessdata.com/dashboard/houston/

- System Performance Measures
  - 5-year data through FY2021
- Project Performance
  - 2020-2022 annual data; can be filtered by project
- Community Performance
  - 2022 homeless system data
HMIS System Admin Webinar Updates

• Information from the HUD-sponsored webinar on March 15, 2023
ESG Street Outreach – Continuing Case Management and Dual Enrollments

• Effective street outreach often includes a “warm hand off” from an outreach worker to other service providers. This may result in dual enrollments in street outreach and a residential project.

• If a street outreach participant enters a shelter, institution, or other housing but are not expected to remain there for an extended time period and it would reasonably be expected the participant will end up in an unsheltered situation upon leaving the shelter, institution, or housing situation, they may remain in the street outreach project.

• HUD expects the CoC to be involved in establishing a standard limit to ensure that services provided by street outreach workers are not unnecessary or duplicative.
What if a client becomes homeless in an ESG Homelessness Prevention project?

Discussed on October 2022 Call

- The CoC may take one of the following approaches to address the situation where a program participant becomes literally homeless while enrolled in an ESG Homelessness Prevention project:

A. The ESG HP project transfers the program participant to a Rapid Re-Housing project (ESG, ESG-CV or CoC) that has an opening; OR

B. The ESG HP project continues to serve the program participant under the ESG HP component; OR

C. If both A and B are available options in the community, allow the client to select either option A or B, based on their preference. Regardless of the option that the CoC chooses, the CoC must update their Coordinated Entry policies and procedures and the ESG recipient must update their ESG written standards to describe how the selected option will be operationalized.
ESG Rapid Unsheltered Survivor Housing (RUSH)

- ESG-RUSH addresses long-term housing and services needs of people at risk of or experiencing homelessness whose needs are worsened by disasters.
- ESG-RUSH awards are made on a formula basis to disaster impacted areas.
- ESG Manual contains detailed ESG RUSH project setup instructions and data collection instructions.
FY 2024 Data Standards

- High level recap of proposed changes
  - PDDEs
    - 2.02 Project Information
    - 2.06 Funding Sources
    - 2.07 Bed & Unit Inventory
    - NEW – 2.08 Participation
    - NEW – 2.09 CE Participation
  - UDEs
    - 3.02 SSN – only last 4 digits required for HUD programs
    - 3.06 Gender – new response options
    - Combine 3.04 and 3.05 Race and Ethnicity
    - 3.16 Client location – name change and data collection stage change
    - 3.12 Destination – reorganizing and renumbering responses, adding additional destination options
  - PSDEs
    - Retire 4.19 and 4.20
    - NEW – 4.21 CE Activity
    - Language and response changes throughout
  - FP PSDEs
    - Retire C1 Wellbeing
    - NEW – C4 Translation Services Needed
    - Language and response changes throughout
SSVF Service Update

• SSVF providers are now required to record veteran incentive services

• Use the following service codes:
  • **Other service** (record for any Incentive; write "Incentive" in the Other Service Description box), plus:
  • **Moving cost assistance** (record for Landlord Incentive & add amount), or:
  • **Housing stability assistance** (record for Veteran Incentive & add amount)

![SSVF Service Update Form Example]
HMIS Site Visits

HMIS Site Visits will be scheduled for all agencies that use the HMIS system.

Purpose is to confirm your agency is completing the data entry correctly in HMIS.

If you would like to schedule your site visit please email us @ hmis@homelesshouston.org
There are two parts to the Site Visit process:

- HMIS Review
- Compliance/Performance Review
HMIS Review

This section of the review focuses on HMIS data. There are 6 categories with a total of 50 possible points for this section.

The categories include:

- Agreements, Certifications & Licenses.
- HMIS Users
- Privacy
- Computer Systems (physical access & security)
- Data quality, accuracy, & reporting
- Housing Programs Only - Inventory
Agreements, Certifications, & Licenses

- This area looks at if the agency has a signed copy of their agency participation agreement, do they have a contact person for HMIS, do all users have a signed agreement, and that all users have completed privacy and security training and have documentation on file.

- Total possible points for this section is 4
This section looks at whether all agency staff members are active in HMIS, if staff members have attended any refreshers or reports trainings within the last 12 months, and that at least one staff member from your agency has attended all 4 HMIS forums.

Total possible points for this section is 3
Privacy

• In this section we are looking at whether agencies have a privacy notice, have hard copy files secure in a locked room and in a locked file cabinet, that your policy covers client’s data generated from HMIS, do you have remote access and usage to electronic client files, do you have a policy for the client’s information for storage and disposal, are you displaying the HMIS notice where clients can see it. The privacy and security of client’s information is extremely important, and something taken very seriously.

• The total possible points for this section is 10
Computer Systems (physical access & security)

• In this section we are looking at whether agencies have the following; workstations in secure locations (locked offices), that computers are being logged off if no one is at the desk, workstations are password protected, computers being used for data entry are not connected to any public WiFi that could possibly compromise security, agencies have a written plan in place if allowed to access the system from outside of the office, and all computers that access HMIS has updated virus protection. The security and safety of client data is extremely important, by following these steps it reduces the chances of compromising client information as well as the HMIS system.

• Total possible points for this section is 6
• In this section we are looking at whether agencies are ensuring personal client identification information is correct, documenting homeless status at intake of clients as defined by HUD, income and non-cash benefits are being updated at least annually and at exit, if using paper that the intake form aligns with the workflow, 100% of clients are entered into HMIS within 5 days of intake, at minimum all required documentation for funding is being collected, agency is actively monitoring program participation/documenting, clients are being exited within 30 days of discharge, agencies are collecting discharge destinations, lead agency reports are being submitted on time.

• Random files will also be spot checked at this time in the site visit.

• Total possible points for this section is 24
Inventory (housing programs only)

• In this section we are looking at agency bed inventory to ensure clients are being entered into a bed in HMIS and the data accurately reflects the program. We are looking to see if bed inventory in HMIS physically matches facility set up, clients are being checked into beds in real time and within 24 hours of changes, housing inventory is being submitted to the Coalition by February deadline. If you see a discrepancy in the beds showing in HMIS for your program, take the time to reach out to let us know it does not match. If your program changes, please take the time to update your bed/unit information with the Coalition to ensure HMIS is accurately reflecting your program. It is important to have accurate numbers in the bed/unit inventory, so we are accurately capturing the number of clients being housed.

• The total possible points for this section is 3
HMIS Section Wrap Up

The overall purpose of this section of the site visit is to ensure the overall security of the HMIS system as well as the security of the client’s personal information/data.

To ensure agencies are accurately capturing data, inputting the required information per grant, and being accountable for documenting client services and interactions. The purpose of documentation is to tell a story of what has transpired with each client from intake to exit.

Ensuring accurate information is being collected and grant standards are being followed is imperative to the successful outcomes of programs.
Compliance/Performance Review

This section of the review focuses on agencies policies, forms, processes, development, and overall performance. There are three categories with a total of 100 possible points.

The categories include:
- Policies and Procedures/Client Documents
- Performance Review (this area captures the outcomes of referrals sent to agencies)
- Staff Trainings and Development
This section of the site visit looks to make sure agencies have the following in place:

- Program Intake Process
- Operations Manual
- Financial Policies and Procedures
- Housing First Policy
- Termination Policy
- Case Note Policy
- Client Grievance Policy
- Enrollment Forms
- Client Exit Policy
- And that the forms are readable for clients and written in a way clients can understand the verbiage.
In this section of the site visit we are looking at the outcomes of referrals sent to agencies:

- Number of referrals Accepted
- Number of referrals Denied/and reason for the denial
- Staff members actively attending workgroups
- Number of project clients served annually at time of visit
- Number of units in contract and number of units being utilized
- Positive % of clients being exited
In this section of the site visit we are looking at trainings being offered to staff, number of staff participating in PIT count, and if agencies are utilizing The Way Home trainings for their staff.

• Housing First Training being provided
• DEI (Diversity, Equity, Inclusion) Training
• Trauma Informed Care Training offered
• Number of staff participated in PIT count
• Agency training program provided to staff or use of The Way Home training for staff
The overall purpose of this section of the site visit is to look at the following:

- Ensure agencies have appropriate policies and procedures in place and are following a standard when assisting clients.
- Ensure referrals are being processed in a timely manner and collect the outcomes of referrals.
- Identify and gaps in services
- Provide support to projects as needed
- Provide guidance in some of the following areas
  - Assist in creating forms
  - Assist in establishing or revamping any policies or procedures needed
  - Assist with any needed trainings
  - Provide other assistance as needed
New to the performance review this year:

Move-in dates entered into HMIS

Addresses entered into HMIS

We will be looking at HMIS to ensure all projects are entering addresses for all clients.

The target goal for this is 100%. 

WE WILL BE LOOKING AT HMIS TO ENSURE PROJECTS ARE ENTERING THE MOVE IN DATES FOR ALL CLIENTS.

THE TARGET GOAL FOR THIS AREA IS 100%. 
Any questions?

For questions regarding your upcoming site visit please reach out to Angel Garmon, CoC Associate at agarmon@homelesshouston.org
HMIS Data Support
HMIS Important Due Dates

Clients In Program Report due

Corrections due - follow up e-mail with attached data quality report attached
We need a report for that

No matter the funding source – if you have a client enrolled in a project within your organization, we need a report for that.

The Clients in Program Report for EACH project within your organization is due to kflores@homelesshouston.org by the 7th of each month.

Corrections (if any) are due by the 15th of each month with a follow up e-mail that includes the data quality report showing all zeros.
### Clients In Program
**01/01/2023 to 01/31/2023**

<table>
<thead>
<tr>
<th>Client ID</th>
<th>Name</th>
<th>SSN last 4</th>
<th>Race</th>
<th>Gender</th>
<th>Age</th>
<th>Enroll Date</th>
<th>Exit Date</th>
<th>Days</th>
<th>Enrollment Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>123</td>
<td>Dove, turtle</td>
<td>XXX-XX-3221</td>
<td>White</td>
<td>Male</td>
<td>63</td>
<td>11/17/2022</td>
<td>31</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>456</td>
<td>Lemon, Pie</td>
<td>XXX-XX-5321</td>
<td>Black, African American, or African</td>
<td>Male</td>
<td>59</td>
<td>03/07/2022</td>
<td>31</td>
<td>300</td>
<td></td>
</tr>
<tr>
<td>789</td>
<td>Pan, Bolting</td>
<td>XXX-XX-6520</td>
<td>White</td>
<td>Female</td>
<td>45</td>
<td>08/28/2022</td>
<td>31</td>
<td>156</td>
<td></td>
</tr>
<tr>
<td>012</td>
<td>Pie, Lemon</td>
<td>XXX-XX-5321</td>
<td>Black, African American, or African</td>
<td>Male</td>
<td>59</td>
<td>03/07/2022</td>
<td>31</td>
<td>330</td>
<td></td>
</tr>
<tr>
<td>345</td>
<td>Rush, No</td>
<td>XXX-XX-9510</td>
<td>Black, African American, or African</td>
<td>Female</td>
<td>42</td>
<td>03/22/2020</td>
<td>31</td>
<td>1045</td>
<td></td>
</tr>
</tbody>
</table>

- **Did I only exit 3 people?**
- **This client is coming up on an annual assessment!**
- **This is the same as Lemon Pie – same age and SSN**
- **Is this the same as Lemon Pie – same age and SSN**
- **Has this client really been there almost 3 years?**
Enrollment & Bed Check In

The CIP report was just completed

• Run the Check in roster report (found in the housing icon in the menu) and compare the number of enrollments to the number of check in’s (the enrollments and bed check in should match, but may not always be 100% being that some clients are not housed yet)

• The report was for previous month, so run the check in roster for the last day of the previous month
Enrollment & Bed Check in

5 clients enrolled = 5 clients checked in
Enrollment & Bed Check in

5 clients enrolled = 3 clients checked in

Check 2 clients in a bed
OR
exit 2 client enrollments
Enrollment & Bed Check in

3 clients enrolled = 5 clients checked in

Check 2 clients out of a bed
Move in Date

01/01/23 client signed lease
01/01/23 client moved in
01/01/23 Housing placement date

01/01/23 client signed lease
01/09/23 exits shelter stay
01/09/23 client moved in
01/9/23 Housing placement date
Move in Date Report – PSH or RRH projects

- From the Home Workspace
  in the menu – click on reports
- Select Program Reports
  click on PH Move In Date & Chronic Status
- Complete the form (by selecting dates and project)
  review the results
Housing Training

Organizations that have Emergency Shelter, Transitional Housing, Rapid Re-Housing, Safe Haven or Permanent Supportive Housing

- HMIS offers a Housing Refresher Training
- This refresher covers
  - Documenting when a client moved into housing
  - Checking in and out of beds
  - Exiting client from the enrollment
Welcome Yvette Fuentes

Coalition for the Homeless News

Welcome to CFTH ClientTrack LIVE site.

Bulletin Board

CORT Furniture, Electricity Assistance, and LIF Requests
Erel Fetahagic
The CORT Furniture Request option, used by the housing case managers, has been moved to the client's Housing menu under Housing Assistance Requests.
The new Electricity Assistance Request and Landlord Incentive Fee (LIF) Request options will be added in the same menu area once these service...
Read More

Attend Annual HMIS Security Training
Keltia Beechum
Each end user must complete annual security training provided by HMIS Staff. Failure to complete this training will result in user account suspension until the training has been completed...
Read More

2023 HMIS Forum Dates
Keltia Beechum

11/15/2022 9:41:00 AM
1/26/2022 10:54:00 AM
12/17/2021 9:24:00 AM
When can saying, “Thank you!” be a bad thing?

Saying “Thank you” to a CLOSED issue ticket will open the ticket back up.
How to read if a client is housed on the client Dashboard

### Client Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
<th>Gender</th>
<th>Race</th>
<th>Ethnicity</th>
<th>Veteran Status</th>
<th>Triage Score</th>
<th>Chronically Homeless</th>
<th>Frequent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>26</td>
<td>Female</td>
<td>Black, African American, or African</td>
<td>Non-Hispanic/Non-Latino(a)(i)(x)</td>
<td>No</td>
<td>42</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CA Assessment Date</th>
<th>Waitlist Placement Date</th>
<th>Housing Placement Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/3/2019</td>
<td></td>
<td>7/2/2019</td>
</tr>
</tbody>
</table>

### HMIS Enrollments

<table>
<thead>
<tr>
<th>Case Name</th>
<th>Start Date</th>
<th>Exit Date</th>
<th>Case Members</th>
<th>Case Manager</th>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11/9/2022</td>
<td>1/19/2023</td>
<td>1</td>
<td>1</td>
<td>Homelessness Prevention</td>
</tr>
<tr>
<td></td>
<td>7/2/2019</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>PH - Permanent Supportive Housing (disability required for entry)</td>
</tr>
<tr>
<td></td>
<td>4/2/2019</td>
<td>4/20/2019</td>
<td>1</td>
<td>1</td>
<td>Services Only</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization</th>
<th></th>
</tr>
</thead>
</table>
Data Quality: Issues that continue to show up
Disabling Conditions
Disabling Conditions

<table>
<thead>
<tr>
<th>Universal Data Assessment</th>
<th>Default Client's Last Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Date: 08/23/2022</td>
<td></td>
</tr>
</tbody>
</table>

| Age while in project: 45 |

| Assessment Type: Entry |

| Disabling Condition: No |

| Client Location: TX-700 - Houston, Pasadena, Conroe/Harris, FL Bend, Montgomery Counties CoC |

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Help</th>
<th>Present?</th>
<th>Condition is Indefinite</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcohol Use Disorder</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chronic Health Condition</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developmental Disability</td>
<td>No</td>
</tr>
<tr>
<td>Drug Use Disorder</td>
<td>Yes</td>
</tr>
<tr>
<td>HIV/AIDS</td>
<td>No</td>
</tr>
<tr>
<td>Mental Health</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Screen: HMIS
All of client's enrollments display below. To add a universal enrollment for the client select add new. Note that exiting or reentering an enrollment will not delete the enrollment for all case members.

1 result found.

<table>
<thead>
<tr>
<th>Case Name</th>
<th>Project Name</th>
<th>Project Type</th>
<th>Members</th>
<th>Enroll Date</th>
<th>Move-in Date</th>
<th>Exit Date</th>
<th>CaseID</th>
<th>EnrollID</th>
<th>EntryAssessID</th>
<th>ExitAssessID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Homelessness Prevention</td>
<td></td>
<td>1</td>
<td>11/23/2022</td>
<td></td>
<td>01/11/2023</td>
<td>816710</td>
<td>1014831</td>
<td>1352239</td>
<td>1360469</td>
</tr>
</tbody>
</table>

2 results found.

Date               | Type | Program
---                | ---  | ---
01/11/2023          | Exit | ---
12/16/2022          | Entry| ---
Please take Note

1st screen

- Basic demographics

2nd screen

- Family members

3rd screen

- Enrollment – here is what is important. If you need to change the project start date, here is where you will do that. The remainder of the entry assessments will automatically change
IssueTrak is a sophisticated system that streamlines the issue resolution process, delegates issues more efficiently, and produces real-time reports to increase issue resolution productivity. IssueTrak is our method of providing technical support for all users. All HMIS users have access to this site.
Common IssueTrak Tickets

Open in IssueTrak

Issue #: 20680
Subject: Duplicate Clients
Status: Open
Issue Type: Client Track
Subtype 1: Duplicate Client
Priority: Medium
Organization: [Redacted]
Submitter: [Redacted]
Assigned To: *Unassigned*
Next Action: Lindsey Grubbs on 14-Mar-2023

Issue Description:
Duplication of Client Records Found - Please include all client ID records and specify which ID has the correct information. If you find the client demographics is not correct this information can be corrected by finding client [on clients workspace] and selecting edit client:

244581
487029
431578

Notes:

Lindsey Grubbs on 15-Mar-2023:
The client was merged into client #244581.
Common IssueTrak Tickets

Issue #: 20720
Subject: Client Checked in at Other Facility
Status: Closed
Issue Type: Client Track
Subtype 1: Housing/Check-In Issue
Priority: Medium
Organization: [Redacted]
Submitter: [Redacted]
Closed By: Yvette Fuentes on 17-Mar-2023
Assigned To: *Unassigned*
Next Action: Yvette Fuentes on 16-Mar-2023

Solution:
you may now check the client into the facility.

Issue Description:
Client ID# [Redacted]
checked in at 03/16/23

Checked in in another facility and cannot check her in.
Duplicate Clients

• Please review the following steps to ensure you do not create any duplicate clients in ClientTrack. It's important to be diligent when creating a new client since the people we serve do not always have complete, verifiable demographic information.

1. Search the system by client social security number
2. If client is not found, search by first and last name using the first 2-3 letters of the name (for example, in searching for Kelly Mitchell, I would search "Ke" for first name and "Mi" for last name). This ensures you catch people who may not have their name spelled correctly in HMIS (you can correct this on the edit client page).
3. Finally, search by birth date
4. Proceed with enrolling the client only if you cannot locate the client's information after following these steps.

When you do come across a duplicate record, please submit a ticket to our team so that we can merge the files for you:

• [https://hmissupport.homelesshouston.org/login.asp](https://hmissupport.homelesshouston.org/login.asp)
New Projects

• Please send an email to hmis@homelesshouston.org to request a new project to be setup in HMIS/ClientTrack
Inactive Projects

If your project has ended, please let the HMIS Support Team know and exit all the clients out of the project.
Did you know?

Users not logging into HMIS for more than 45 days will be locked out due to non-activity. Please don’t forget to log into the system.
Referrals Overview

• Electronic referrals are now an indispensable part of Coordinated Access and an important communication tool for our partner agencies.

• ClientTrack referrals are set up to generate notification emails.
Referral Tip #1: Are you in the right Org?

- If you're creating a Coordinated Access referral, you must log in using the Coordinated Access organization. If you're referring on behalf of your own agency, then log in using your parent organization.
Referral Tip #2: Is there an ROI?

• When creating a referral, please ensure that the Information Release is in place. Go to Edit Client> Release Exceptions and see if there's release dated on/before the referral date.

• Do not create bulk releases to all the organizations at once; only release your information to the appropriate partner organizations.
Referral Tip #3: Add comments

• If you want to relay additional information to the provider, use the Comments textbox in the referral form.

• You can also add text to the email but remember that unencrypted emails are not secure.
Referral Tip #4: Emails are not foolproof!

• Emails can be skipped, rejected by email servers, marked as spam, or deleted by accident.

• Before you send a referral email, make sure that the correct provider is shown in the "To" box.

• You may also want to follow up with another personal email or a phone call.

![Email Example]

This email is to inform you that Coordinated Access is referring Vet, Johnny (HMIS ID - 4993) to your RRH Test Provider.

The client provided the contact information listed below:

Home phone - 832-999-5555
Cell phone -
Email address - Jvet@GIJoe.com

Please log into HMIS, and update the referral outcome.
Referral Tip #5: Run reports

- If you are the referral recipient, you should run periodic reports.
- Go to Reports> Data Explorer and run "Referrals to My Provider"
- The Provider Name is not the same as your agency or project name
- Go to the Providers workspace to get the correct name and other details

![Image of report interface]

<table>
<thead>
<tr>
<th>Date</th>
<th>Referral Date</th>
<th>From</th>
<th>To</th>
<th>Referral Comment</th>
<th>Result Date</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/02/2023</td>
<td>14/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/02/2023</td>
<td>Service Provided</td>
</tr>
<tr>
<td>03/04/2023</td>
<td>16/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/04/2023</td>
<td>Service Provided</td>
</tr>
<tr>
<td>03/05/2023</td>
<td>17/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/05/2023</td>
<td>Service Provided</td>
</tr>
<tr>
<td>03/06/2023</td>
<td>18/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/06/2023</td>
<td>Service Provided</td>
</tr>
<tr>
<td>03/07/2023</td>
<td>19/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/07/2023</td>
<td>Service Provided</td>
</tr>
<tr>
<td>03/08/2023</td>
<td>20/03/2023</td>
<td>Ca.</td>
<td>Re.</td>
<td>Client is a risk</td>
<td>03/08/2023</td>
<td>Service Provided</td>
</tr>
</tbody>
</table>
What is the Support Committee?

The TX-700 Homeless Management Information System (HMIS) Support Committee is an advisory body that supports and enhances the overall mission of the HMIS Project. This includes advising HMIS Project staff on functions related to HMIS Project policies and guidelines.
HMIS Support Committee

- Preston Witt – Harmony House
- Neysa Gavion – West Houston Assistance Ministries
- Earnest Dyer – The Salvation Army
- Kelly Ward – SEARCH Homeless Services
- Yvonne Benamar Gonzales – Avenue 360
- Scot More – Coalition for the Homeless
- Omar Sesay – The Harris Center
- Tamela Olive – Star of Hope
- Susan Keith Broussard – Healthcare for the Homeless
- Morris Cole – Volunteer of America Texas
2023 HMIS Support Committee Meetings

• May 16
• August 15
• November 15

• Virtual Meeting time @ 2:30-3:45 pm
Designate a staff person and a back up to act as the Partner Agency security officer, responsible for the implementation of the HMIS security procedures at the Partner Agency Level.

Please send your officers contact information to hmis@homelesshouston.org
2023 Security Officer Training

- June 28 @ 9-10:30
- October 4 @ 2-2:30
- December 6 @ 9-10:30
## Training Courses

<table>
<thead>
<tr>
<th>Course Description</th>
<th>Course Detail</th>
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</thead>
<tbody>
<tr>
<td>New User Training</td>
<td>Users will learn the basic skills and concepts needed in order to complete the client intake process.</td>
</tr>
<tr>
<td>Refresher Training</td>
<td>Help to refresh the skills of active users, as well as review any issues users may have with navigating through the system or the data collection process.</td>
</tr>
<tr>
<td>Reports Training</td>
<td>Users are given an overview of the various reporting options available in ClientTrack.</td>
</tr>
<tr>
<td>Data Explorer</td>
<td>Trains experienced users with good knowledge of existing ClientTrack reports on the usage of ClientTrack’s ad hoc data analysis tool. (Limited to one user per agency per session)</td>
</tr>
</tbody>
</table>
HMIS User Trainings

Please use the calendar below to view and register for all HMIS trainings. HMIS Trainings are held virtually via GoTo Training and cameras are mandatory for all trainings. If you have any questions or concerns, please email Lindsey Grubbs at lgrubbs@homelesshouston.org. The HMIS trainings are available only for participating agencies. If your agency is not currently participating in HMIS, please send an inquiry to hmis@homelesshouston.org and we will provide you with more information about the HMIS participation requirements.

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<td>2</td>
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</table>

- [https://www.homelesshouston.org/hmis-v2#HMISUserTrainings](https://www.homelesshouston.org/hmis-v2#HMISUserTrainings)
## 2022 Trainings Conducted

<table>
<thead>
<tr>
<th>Trainings</th>
<th># of Trainings</th>
<th>Total Attendees</th>
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</thead>
<tbody>
<tr>
<td>HOPWA</td>
<td>10</td>
<td>22</td>
</tr>
<tr>
<td>New User</td>
<td>53</td>
<td>672</td>
</tr>
<tr>
<td>New User - Path/Outreach</td>
<td>10</td>
<td>28</td>
</tr>
<tr>
<td>New User - Emergency Shelter</td>
<td>12</td>
<td>42</td>
</tr>
<tr>
<td>Refresher</td>
<td>34</td>
<td>424</td>
</tr>
<tr>
<td>Reports/APR</td>
<td>12</td>
<td>152</td>
</tr>
<tr>
<td>Supervisor</td>
<td>12</td>
<td>68</td>
</tr>
<tr>
<td>HMIS Housing</td>
<td>4</td>
<td>265</td>
</tr>
<tr>
<td>Data Explorer</td>
<td>3</td>
<td>38</td>
</tr>
</tbody>
</table>
Did you know?

• Refresher training is required of all new users three months after initial training. Accounts will be deactivated if the refresher is not attended.
HMIS Security Training

• Each end user must complete annual security training provided by HMIS Staff. Failure to complete this training will result in user account suspension until the training has been completed.
HMIS Security Training

There were 48 Security Trainings held this year.

The last HMIS security training will be held on March 24, 2023.
Thank you for using IssueTrak

1. Vanessa Nelson
2. Tatiana Butler
3. Kiley Martens
4. Monica Waters
5. Kristina Arscott
2023 HMIS Forum Dates

June 15
September 21
December 7
HMIS Issues

• Issues must be tracked for reporting purposes
• Do not e-mail HMIS staff directly unless instructed to do so
• Use any of the following methods for assistance:
  • Go to https://hmissupport.homelesshouston.org
    • Everyone has a username and password for this – it was given at time of training
  • Send an e-mail to hmis@homelesshouston.org
  • Call the Help Desk
    • 832.531.6020 or 832.531.6030
    • Tuesday – Thursday 9AM-11AM and 1PM-2PM
The HMIS Team will be attending the 2023 Spring NHSDC (National Human Services Data Consortium) April 3-5, 2023

Please submit any issues in Issuetrak or email the HMIS team. We will continue to monitor the system and respond to tickets.

hmissupport.homelesshouston.org/
hmis@homelesshouston.org
Mini Documentary on Houston’s Approach to Homelessness

Here’s the link to watch: https://youtu.be/l6STb4Uj4CY
Thank You!!

The Coalition for the Homeless leads in the development, advocacy, and coordination of community strategies to prevent and end homelessness.

The Way Home is the collaborative model to prevent and end homelessness in Houston, Harris, Ft. Bend, & Montgomery Counties. For more information visit www.thewayhomehouston.org