

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 &
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Kelita Beechum –
Data System
Manager

Agnes Asigbey –
Manager of
Analytics and
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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

Measure	Goal	Change	Percentage change
Change in Annual HMIS Counts	Reduce the annual number of people experiencing homelessness	<p>Sheltered Persons</p> <p>5749 6692</p> <p>■ 2021 ■ 2022</p>	16% increase
Length of Time People Remain Homeless	Reduce the average length of time people remain homeless from the time people seek services	<p>Days Homeless</p> <p>108 105</p> <p>■ 2021 ■ 2022</p>	3% decrease
Returns to Homelessness	Reduce the percent of persons who return to homelessness in 2 years	<p>Returns to Homelessness</p> <p>20% 15%</p> <p>■ 2021 ■ 2022</p>	5% decrease

- Full report is posted at: homelesshouston.org> The Way Home> Performance Measurement

SPMs at a Glance #2

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

- Full report is posted at: [homelesshouston.org> The Way Home> Performance Measurement](https://homelesshouston.org/The-Way-Home/Performance-Measurement)

The Way Home Performance Dashboards

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



Performance Dashboards

The dashboards present information for providers and the public on The Way Home's projects, clients, and systems. Each dashboard displays a different lens into the data and should be used with knowledge of the dashboard's design to best understand the issue of homelessness in The Way Home Continuum of Care.

SYSTEM PERFORMANCE MEASURES

- Annual metrics based on HUD's SPMs
- Best for broad, entire system performance monitoring
- Allows for year-to-year trend analysis
- Navigate to Houston, Pasadena, Conroe/Harris, Fort Bend, Montgomery Counties CoC (TX-700) to see our CoC's data

PROJECT PERFORMANCE DASHBOARD

- A visual representation of HUD Annual Performance Reports
- Best for peer-to-peer program evaluation of projects
- Data is unique to the project level; a client may be enrolled in multiple projects

COMMUNITY PERFORMANCE DASHBOARD

- Best for looking at overview of community of clients
- Customizable time range
- De-duplicated client counts

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)

Service Date: *	03/23/2023	
Grant: *	<div><div></div>SSVF RRH</div>	
Service : *	<div>Other Service</div>	
Other Service Description: *	<div></div>	
Enrollment: *	<div>-- SELECT --</div> <div></div>	

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

The Way Home

An orange icon of a house roof, consisting of two slanted lines meeting at a peak, positioned above the letter 'H' in the title.

HMIS and Performance
Site Visit Overview

A large orange triangle pointing upwards, located in the bottom right corner of the slide.



There are two parts to the Site Visit process:



HMIS Review

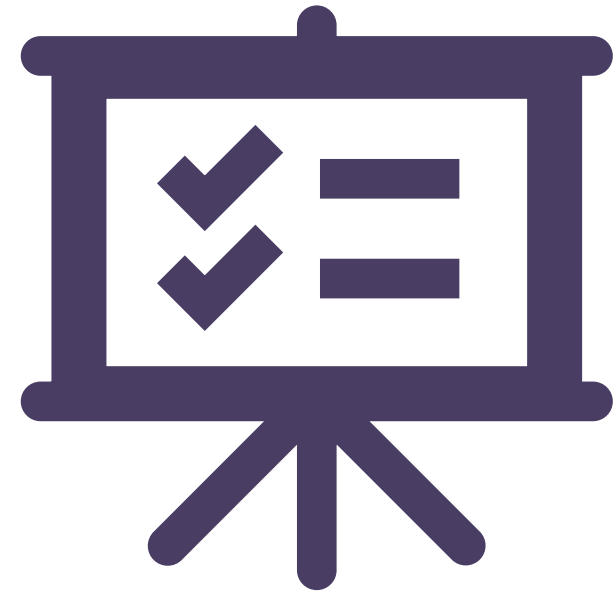
Compliance/Performance
Review

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

HMIS Users

- 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 look 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

Data Quality, Accuracy and Reporting


- 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.

A light purple downward-pointing arrow indicating a flow from the first box to the second.

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.

A light red downward-pointing arrow indicating a flow from the second box to the third.

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



Policies and Procedures/ Client Documents

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.

Performance Review

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

Staff Trainings and Development

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

Compliance/Performance Review Section Wrap Up

The overall purpose of this section of the site visit is to look at the following:

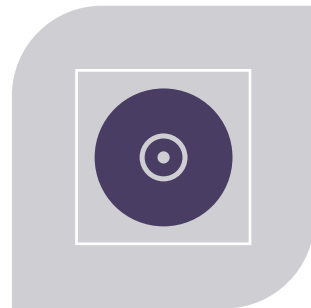
- Ensure agencies have appropriate policies and procedures in place and are following a standard when assisting clients.
- Ensure referrals are being processed in a timely manner and collect the outcomes of referrals.
- Identify and gaps in services
- Provide support to projects as needed
- Provide guidance 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



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

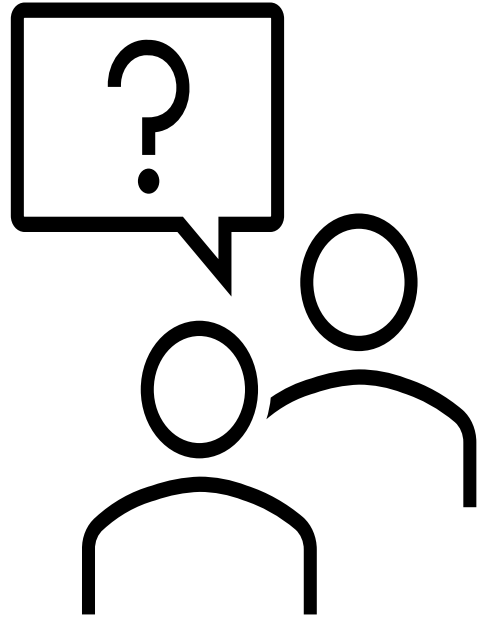


THE TARGET GOAL FOR THIS AREA
IS 100%.

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%.



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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Corrections due -
follow up e-mail with
attached data quality
report attached

We need a report for that



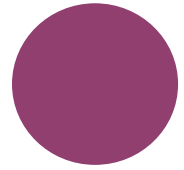
No matter the funding source – if you have a client enrolled in a project within your organization, we need a report for that



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

Did I only exit 3 people



Name of Organization Name of Project		Enrolled 52	Exited 3	Total 55	Clients 55				
Client ID	Name	SSN last 4	Race	Gender	Age	Enroll Date	Exit Date	Days	Enrollment Length
123	Dove, Turtle	XXX-XX-3221	White	Male	63	11/17/2022		31	75
456	Lemon, Pie	XXX-XX-5321	Black, African American, or African	Male	59	03/07/2022		31	330
789	Pan, Baking	XXX-XX-8520	White	Female	45	08/28/2022		31	156
012	Pie, Lemon	XXX-XX-5321	Black, African American, or African	Male	59	03/07/2022		31	330
345	Rush, No	XXX-XX-9510	Black, African American, or African	Female	42	03/22/2020		31	1045

Is this the same as Lemon Pie – same age and SSN

This client is coming up on an annual assessment

Is this the same as Pie Lemon – same age and SSN

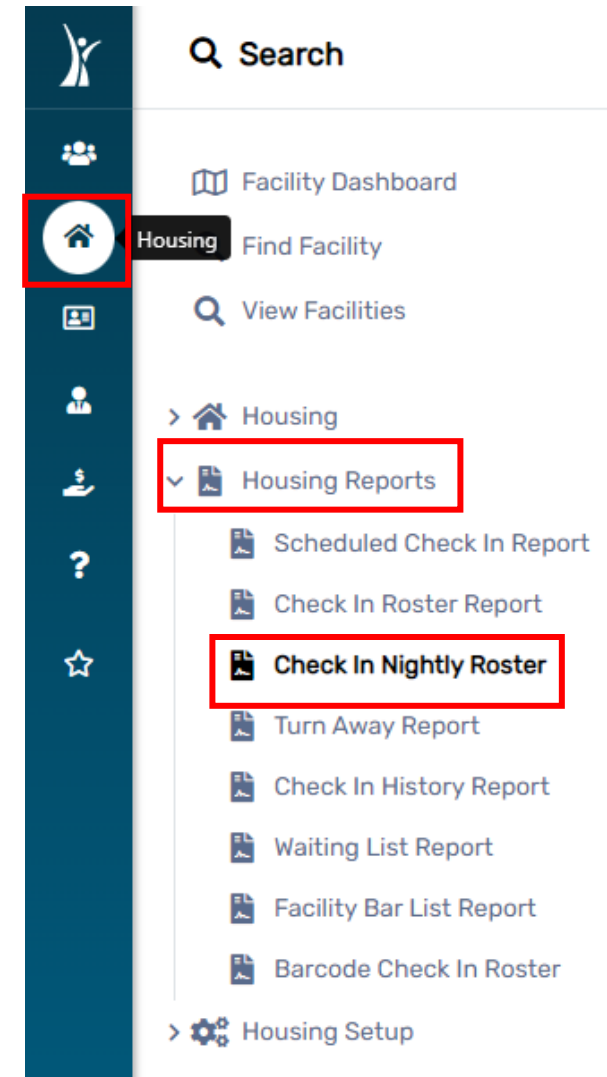
Has this client really been here almost 3 years

Clients In Program Report – How to Review the Data

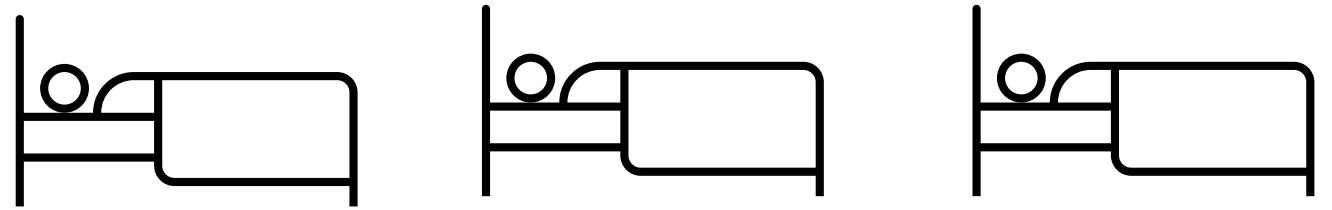
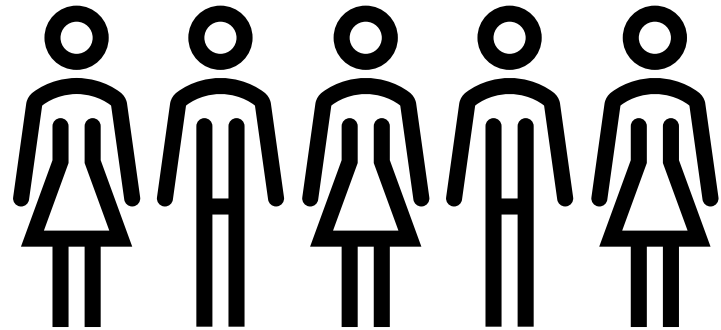
Enrollment & Bed Check In

The CIP report was just completed

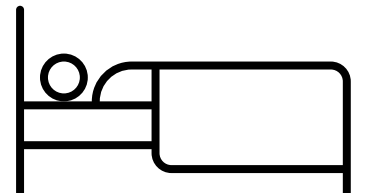
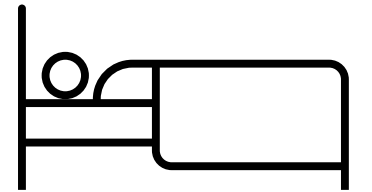
- Run the Check in roster report (found in the housing icon in the menu) and compare the number of enrollments to the number of check in's (the enrollments and bed check in should match, but may not always be 100% being that some clients are not housed yet)
- The report was for previous month, so run the check in roster for the last day of the previous month



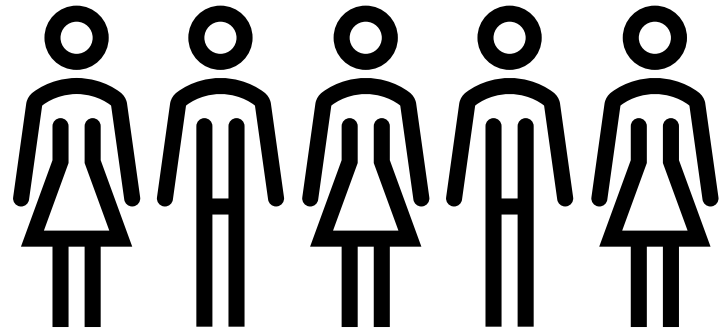
Enrollment & Bed Check in



5 clients enrolled =
5 clients checked in



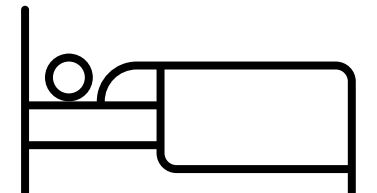
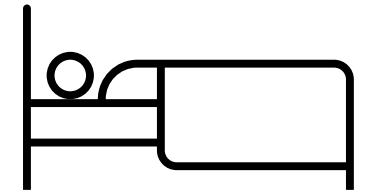
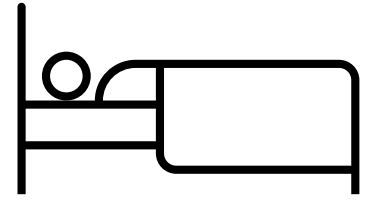
Enrollment & Bed Check in



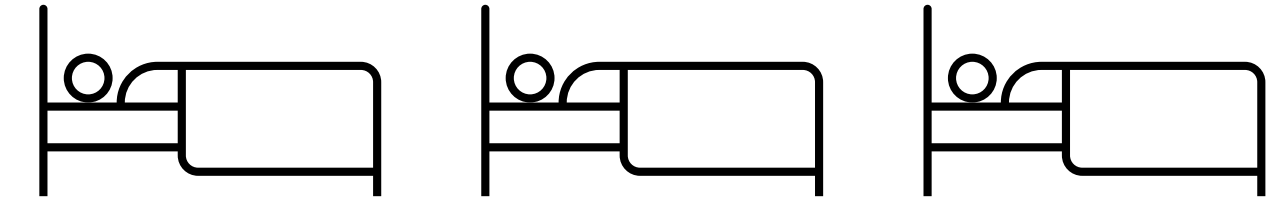
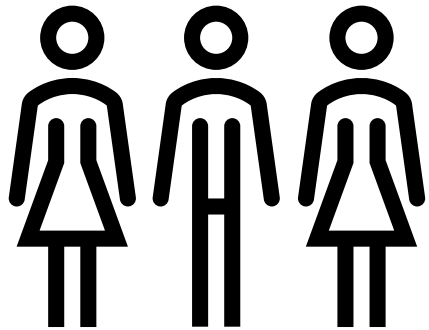
5 clients enrolled =
3 clients checked in



Check 2 clients in a bed
OR
exit 2 client enrollments



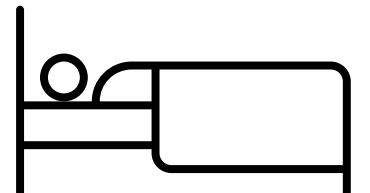
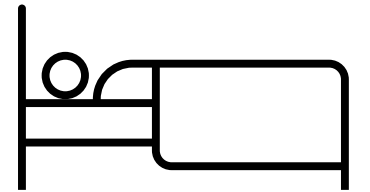
Enrollment & Bed Check in



3 clients enrolled =
5 clients checked in

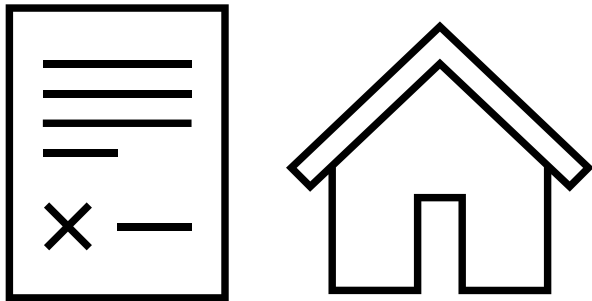


Check 2 clients out of a
bed

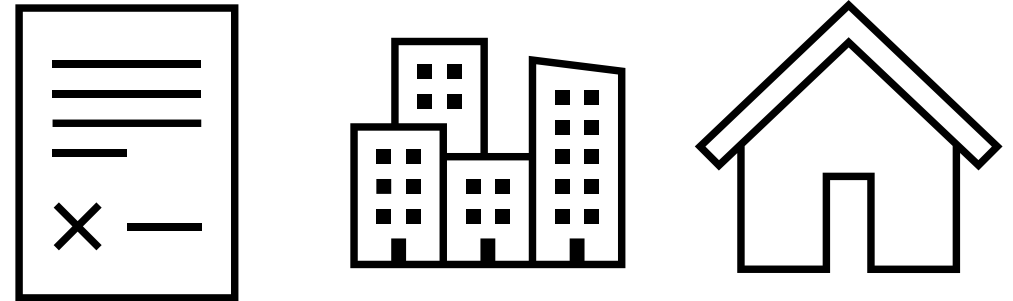


Move in Date

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



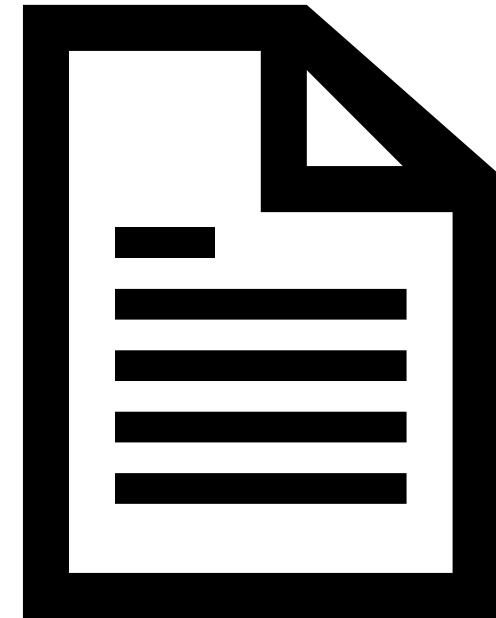
01/01/23 client signed lease
01/09/23 exits shelter stay
01/09/23 client moved in
01/9/23 Housing placement date



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

Bulletin Board

Search



Home / Welcome Yvette Fuentes

YF



User Dashboard

Recent

Paused Operations

> My ClientTrack

> Reports

> Global Administration

Yvette Fuentes

Coalition for the Homeless
HMIS Programs



Welcome Yvette Fuentes



Coalition for the Homeless News



Welcome to CFTH ClientTrack LIVE site.

Bulletin Board



CORT Furniture, Electricity Assistance, and LIF Requests

11/15/2022 9:41:00 AM

Erol 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

1/26/2022 10:54:00 AM

Kelita 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 complete...

[Read More](#)

2023 HMIS Forum Dates

12/17/2021 9:24:00 AM

Kelita Beechum


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



Name:

Age:

26

Gender:

Female

CA Assessment Date:

3/25/2019

Waitlist Placement Date:

Housing Placement Date:

7/2/2019

Race:

Black, African American, or African

Ethnicity:

Non-Hispanic/Non-Latin(a)(o)(x)

Veteran Status:

No

Triage Score:

42

Chronically Homeless:

Yes

Frequent:

No

HMIS Enrollments

Case Name	Start Date	Exit Date	Case Members	Case Manager	Project Name	Project Type	Organization
	11/9/2022	1/19/2023	1			Homelessness Prevention	
	7/2/2019		4			<u>PH - Permanent Supportive Housing (disability required for entry)</u>	
	4/2/2019	4/30/2019	1			Services Only	



Data Quality: Issues that continue to show up

Disabling Conditions

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data, any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected.

Master Assessment Active. [Change Assessment](#)

Default Client's Last Assessment ⓘ

Universal Data Assessment * 12/14/2022 ⓘ
Information Date:

Age while in project: 9

Assessment Type: Entry ▼

Disabling Condition: Client Doesn't Know ▼

Assessment Active

Identified Date: * 12/14/2022 ⓘ

Screen: HMIS ▼

Disabling Condition: Client Doesn't Know ▼

		Barrier ⓘ	Help	Barrier Present? *	Condition is Indefinite
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Alcohol Use Disorder	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Health Condition	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Developmental Disability	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drug Use Disorder	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HIV/AIDS	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mental Health	?	No ▼	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Physical Disability	?	No ▼	

Disabling Conditions

Master Assessment Active. [Change Assessment Date](#)

Default Client's Last Assessment ⓘ

Universal Data Assessment * 08/23/2022 ⓘ

Information Date:

Age while in project: 45

Assessment Type: Entry ▼

Disabling Condition: No ✓

geographic area where the head of household is staying at the time of project entry.

Client Location : * TX-700 - Houston, Pasadena, Conroe/Harris, Ft. Bend, Montgomery Counties CoC ▼

Assessment Active

Identified Date: * 08/23/2022 ⓘ

Screen: HMIS ▼

Disabling Condition: No ▼

	Barrier ↑↓	Help	Barrier Present? *	Condition is Indefinite	Ex
✎ 🗑	Alcohol Use Disorder	?	Yes ▼	No ▼	
✎ 🗑	Chronic Health Condition	?	No ▼		
✎ 🗑	Developmental Disability	?	No ▼		
✎ 🗑	Drug Use Disorder	?	Yes ▼	No ▼	
✎ 🗑	HIV/AIDS	?	No ▼		
✎ 🗑	Mental Health	?	Yes ▼	No ▼	

Income
Missing at
Start

Enrollments

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.

Case Name	Project Name	Project Type	Members	Enroll Date ↓↑	Move -In Date	Exit Date	CaselD	EnrollID ↓↑	EntryAssessID	ExitAssessID
...		Homelessness Prevention	1	11/23/2022		01/11/2023	816710	1014831	1352239	1360469

Master Assessments

Below is a list of Master Assessments that have been created for this client. To create a new assessment, click **Add New**.

2 results found.

	Date	Type	Program
...	01/11/2023	Exit	
...	12/16/2022	Entry	

Please take Note

1st screen

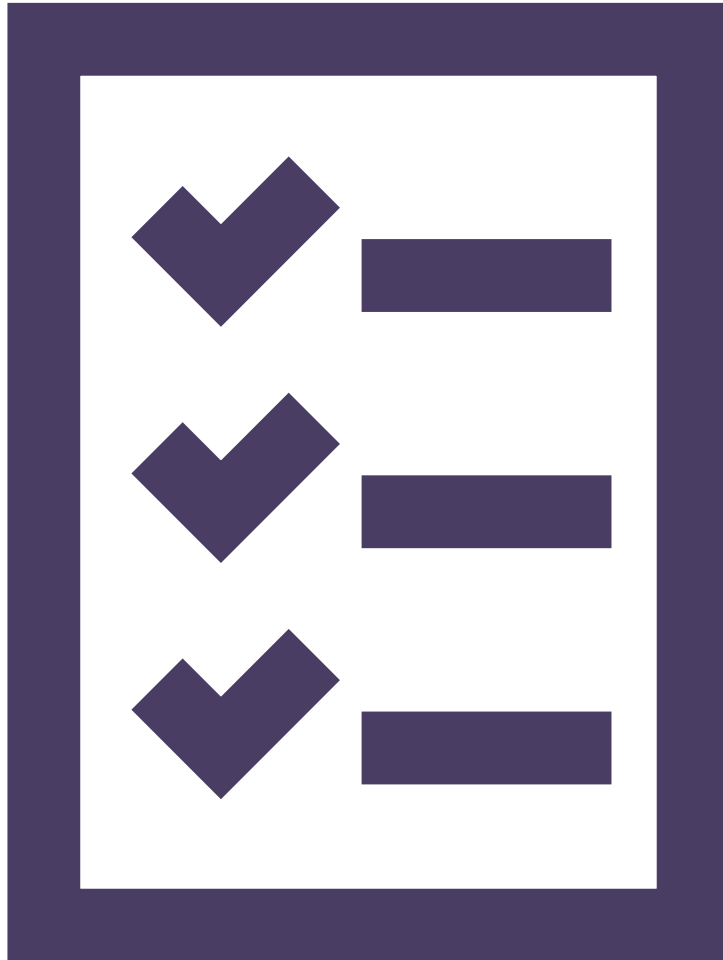
- Basic demographics

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

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

[Open in IssueTrak](#)

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]
[REDACTED] checked in at [REDACTED] 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>



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.

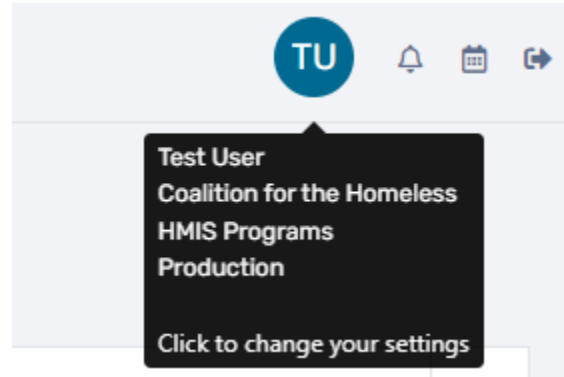
Referrals Overview

- 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.



ACCOUNT SETTINGS

Workgroup

Coordinated Access

Organization

Coordinated Access


















Location

CFTH

Apply

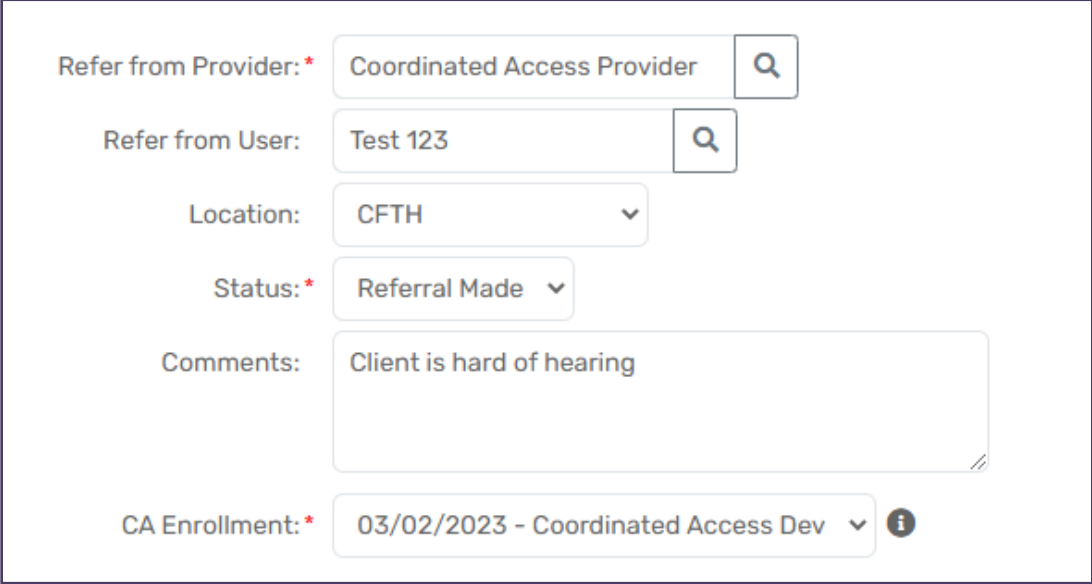
Referral Tip #2: Is there an ROI?

- 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.

<input type="checkbox"/> Organization 	Begin Date*	End Date
<input type="checkbox"/> A Caring Safe Place	MM/DD/YYYY 	MM/DD/YYYY 
<input type="checkbox"/> AAMA	MM/DD/YYYY 	MM/DD/YYYY 
<input type="checkbox"/> Access Care of Coastal Texas	MM/DD/YYYY 	MM/DD/YYYY 
<input type="checkbox"/> Adaptive Construction Solutions	MM/DD/YYYY 	MM/DD/YYYY 
<input type="checkbox"/> AIDS Foundation Houston	MM/DD/YYYY 	MM/DD/YYYY 
<input checked="" type="checkbox"/> Alliance of Community Assist. Ministries	03/01/2023 	MM/DD/YYYY 
<input type="checkbox"/> Ambassadors for Christ Youth Ministries	MM/DD/YYYY 	MM/DD/YYYY 
<input type="checkbox"/> American GI Forum	MM/DD/YYYY 	MM/DD/YYYY 

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.

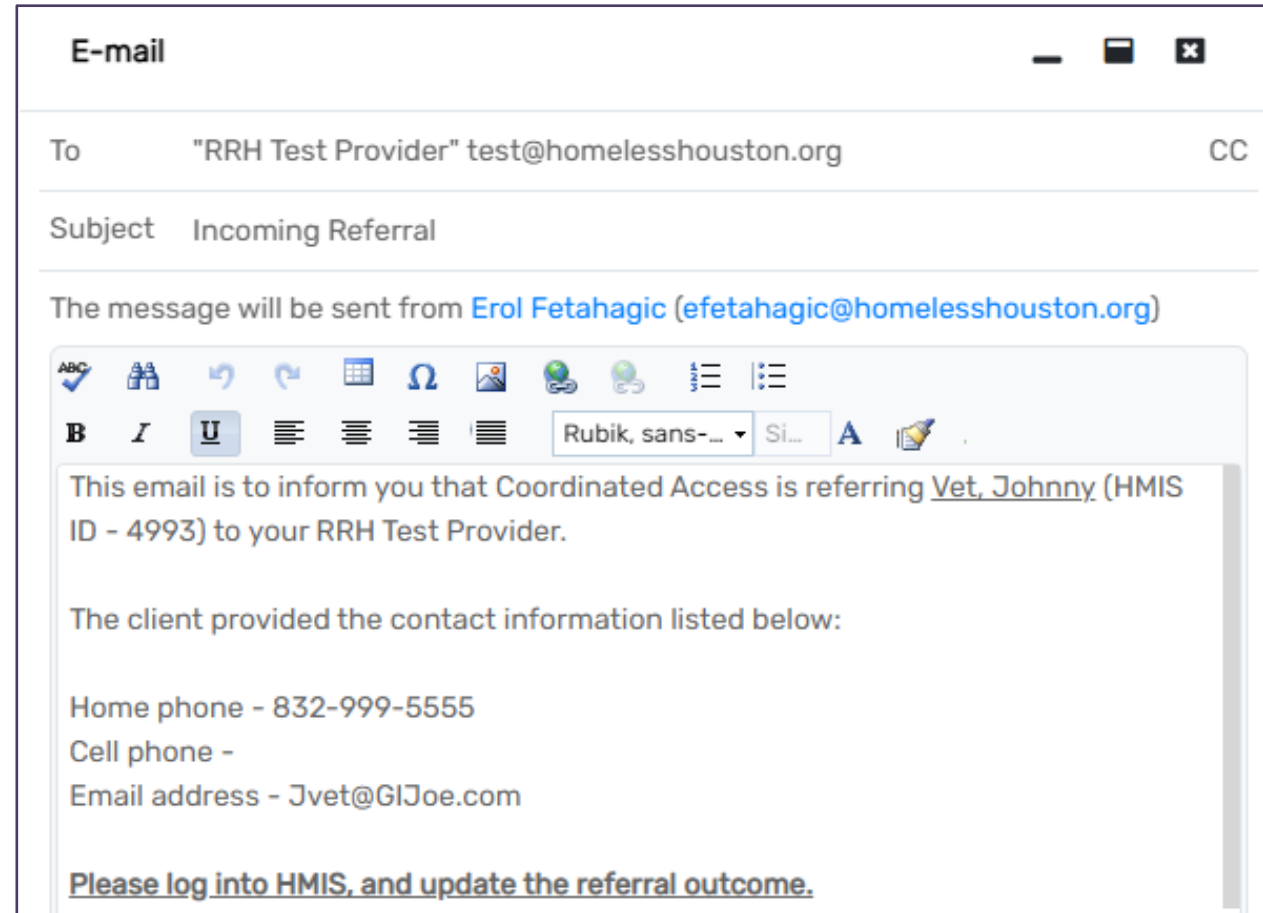


The screenshot shows a referral form with the following fields and values:

- Refer from Provider:** * Coordinated Access Provider (with a search icon)
- Refer from User:** Test 123 (with a search icon)
- Location:** CFTH (dropdown menu)
- Status:** * Referral Made (dropdown menu)
- Comments:** Client is hard of hearing (text area)
- CA Enrollment:** * 03/02/2023 - Coordinated Access Dev (dropdown menu with an information icon)


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.



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

Question Parameters 

@BeginDate

3/1/2023

@EndDate

3/15/2023

@MyProviderName

Coalition for the Homeless SOAR

Done

Referrals To My Provider										
13 results found.										
Cli...	Cli...	Referral Date	Fro...	Cr...	Referral ...	Referral Commen...	To ...	St...	Result Date	Result
83...	Me...	03/02/2023	Co...	Mir...	Referral t...		Co...	Re...	03/02/2023	Service Provided
17...	Gri...	03/01/2023	Ca...	Tre...	Referral t...	Client is a reques...	Co...	Re...	03/02/2023	Service Provided
19...	Ga...	03/03/2023	Ca...	Tre...	Referral t...	Client is request ...	Co...	Re...		
26...	Jol...	03/08/2023	Ca...	Tre...	Referral t...	Client request co...	Co...	Re...		
32...	Ra...	03/13/2023	Ca...	So...	Referral t...	Client wants to a...	Co...	Re...	03/14/2023	Service Provided



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



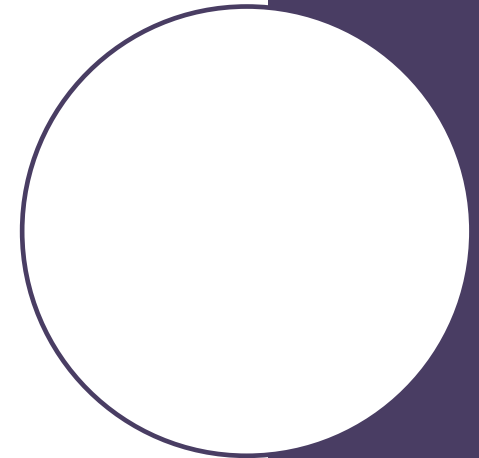
2023 HMIS Support Committee Meetings

- May 16
- August 15
- November 15
- Virtual Meeting time @ 2:30-3:45 pm

Security Officer

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

Course Description	Course Detail
New User Training	Users will learn the basic skills and concepts needed in order to complete the client intake process.
Refresher Training	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.
Reports Training	Users are given an overview of the various reporting options available in ClientTrack.
Data Explorer	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)

HMIS Trainings

- <https://www.homelesshouston.org/hmis-v2#HMISUserTrainings>

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.

29	30	31	1 9am HMIS New User Training	2	3	4
5 9am HMIS Supervisor Support Training	6 9am HMIS New User Training	7	8 9am HMIS Refresher Training	9	10	11
12 9am HMIS Emergency Shelter Training 1pm HMIS Outreach/PATH Training	13	14	15 9am HMIS Refresher Training	16	17	18
19	20 9am HMIS New User Training	21	22 9am HMIS Refresher Training 1pm HMIS HOPWA Training	23	24	25
26 9am HMIS Reports Training	27	28	29 9am HMIS New User Training	30	1	2

2022 Trainings Conducted

Trainings	# of Trainings	Total Attendees
HOPWA	10	22
New User	53	672
New User- Path/Outreach	10	28
New User- Emergency Shelter	12	42
Refresher	34	424
Reports/APR	12	152
Supervisor	12	68
HMIS Housing	4	265
Data Explorer	3	38



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
-

NHSDC Conference

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



Coalition for the Homeless
2000 Crawford St., Suite 700
Houston, TX 77002