HMIS PROCESS GUIDE

FOR

YHDP JOINT TH-RRH Projects

Rev. 9/14/2023

CONTENTS

Getting Started 3
- Introduction 3
- General HMIS Guidance for Joint TH-RRH Component Projects 3
- Important Prerequisite Notice 4

Receiving Referrals 5
Processing Referrals 5
Accessing the Client Record 6
- Completing the Detroit Housing Match Assessment 7
- Updating RRH Outcomes/Client Status (RRH PROJECTS ONLY) 8
- Updating the Referral Outcome (within the Client Record) 10

Recording Intake Information 11
- Updating the Household (if necessary) 11
- Managing the Visibility of the Client Record 11
- Creating the Project Entry 13
- Completing the Detroit YHDP Housing Intake Assessment 14

Documenting Case Notes 16
- Adding Additional Case Notes 17

Recording Service Transactions 18
Updating and Maintaining the Client Record 20
- Completing Routine Update Interim Reviews 20
- Recording the Housing Move-In Date (RRH ONLY) 23
- Completing Annual Assessment Interim Reviews 24

Exiting the Client 25
- Recording Client Discharge Information 25

Recording Aftercare Activity 27
- Creating the Mandatory Aftercare Record 27

Appendix I: Running Referral Report & Updating Outcomes 29
- Running the Referral Report 29
- Updating Referral Outcomes (within the Referral Report) 30

Appendix II: Assigning a Case Manager (Optional) 31
Appendix III: Additional Resources 32
Appendix IV: YHDP Joint RRH HMIS Data Entry Checklist 33
Appendix V: YHDP Joint TH HMIS Data Entry Checklist 36

GETTING STARTED

INTRODUCTION

This process guide outlines the Homeless Management Information System (HMIS) data entry requirements for Detroit's YHDP Joint TH-RRH Component Projects. It contains detailed step-by-step instructions for creating and maintaining client records in Community Services (Michigan's HMIS platform) and provides several appendices that offer additional pertinent information.

GENERAL HMIS GUIDANCE FOR JOINT TH-RRH COMPONENT PROJECTS

- Both components of Joint TH-RRH must be set up *separately* in the HMIS
- Program participants may choose to receive assistance through only one portion of the project, but they must have had the option to receive assistance through both (based on project availability).
- The project entry/exit dates for clients enrolled in Joint TH should reflect the actual dates they were residing in the TH facility.
- The project entry/exit dates for Joint RRH should reflect the *entire* time clients were receiving assistance from the joint component project, whether or not they received Joint RRH rental assistance, specifically.
- All clients entering Joint TH must have a dual enrollment in Joint RRH to indicate that they are under consideration for that portion of the project as well. When this occurs, the project entry in both programs should reflect the Joint TH *Project Start Date*.
    - If a client exits Joint TH without transitioning to Joint RRH, they would be closed out of both projects on the day they exit Joint TH. They would not have a housing move-in date recorded in the Joint RRH project bin.
- Some clients may be referred directly to Joint RRH without entering Joint TH (due to client choice or lack of bed availability). In these cases, the Joint RRH *Project Start Date* would be the date they meet all the requirements for being admitted into the project which include:
    - Information provided by the client or from the referral indicates that they meet all the criteria for admission;
    - The client has indicated that they want to be served or housed in the project; and
    - The client can access services and housing through the project. The expectation is the project has a housing opening or expects to have one in a reasonably short period of time.
- Since clients entering the Joint RRH project may be served directly from transitional housing living situations, cases may arise where clients enter the Joint RRH project from other TH projects; without also having been served in the associated Joint TH project. In this case, the Joint RRH *Project Start Date* should reflect the day they are admitted into the Joint RRH project.

- If a Joint RRH client (or any other RRH client) loses their housing and the project stops paying rental assistance, the client should be exited from the RRH project, and a new RRH project enrollment should be created for the following day. The project would continue working with the client until a new unit is found, at which point, a new *Housing Move-In Date* would be recorded. This ensures both that the client's history of move-in dates is preserved and that the people who are not currently in housing are captured appropriately in reporting.
- For more information, refer to the *HMIS Overview for YHDP Joint TH-RRH Projects* outlined in *Appendix III: Additional Resources.*

Important Prerequisite Notice

The following workflow requires program staff to have a firm understanding of the basic Community Services functionality. Individuals who are either new to the system or are unfamiliar with any aspect of creating or maintaining client records MUST complete the appropriate HMIS prerequisite training and closely follow the detailed steps outlined within this process guide. Failure to do so will result in data quality and reporting issues.

Experienced end-users may refer to *Appendix IV: YHDP Joint RRH HMIS Data Entry Checklist* and/or *Appendix V: YHDP Joint TH HMIS Data Entry Checklist* for a high-level overview of the HMIS data entry requirements for this project.

Receiving Referrals

Referrals for Detroit's YHDP Joint TH-RRH Component Projects will be received from CAM via Community Services and can be accessed by running a Referral Report. For more information, please see *Appendix I: Running Referral Reports & Updating Referral Outcomes.*

After receiving a referral from CAM, providers must attempt to contact the client to schedule the initial intake meeting. Three attempts must be made, with one of the attempts being an email to the navigation team, shelter case manager, and/or street outreach provider working with the client.

Processing Referrals

The referral outcome determines the steps that need to be taken within the HMIS. However, all workflows begin with accessing the client record.

Referrals should be accepted when the provider accepts the client into the project.

Referrals should be cancelled when the provider is unable to contact the client.

Referrals should be declined when the client is found to be ineligible or refuses services at the point of intake.

IMPORTANT NOTE

Before canceling a referral, providers must attempt to contact the client on three separate occasions, with one of the contacts being an email to the shelter case manager and/or street outreach provider working with the client. These attempts must be documented on the client's Summary page in Community Services.

Regardless of the referral outcome, providers should notify the YHDP Navigation Team that a referral was made and provide the navigation team with the outcome of that referral.

ACCESSING THE CLIENT RECORD

The process begins with the following steps:

1. Enter Data As (EDA) into the appropriate YHDP Joint Component bin, if not already defaulted to that provider bin.

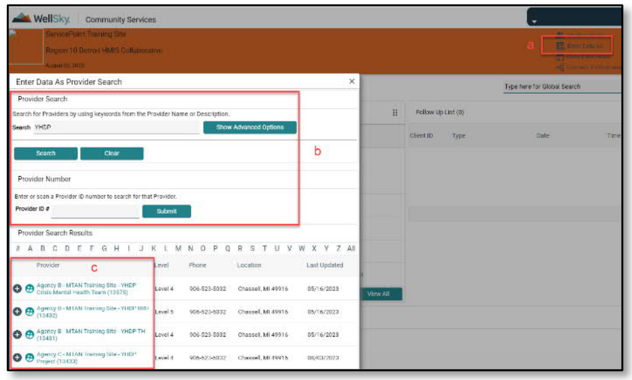
   NOTE: *When working with "dual enrollment" clients, data entry should always begin in the Joint TH bin.*

   a. Click on the Enter Data As link located at the top right corner of the screen.

   b. Search for the provider bin.

   c. Click the plus (+) sign to select the provider.

   d. Click Exit



2. Select backdate mode, if not entering data in real time.

   a. Click on the Back Date link located under the Enter Data As link in the upper right-hand corner of your screen.

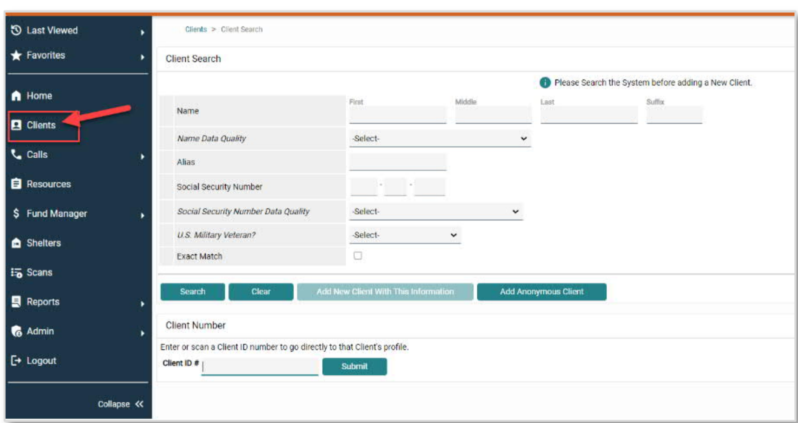
   b. Enter the date the information was captured, if not the current date.

   c. Click Set Back Date.

3. Locate the existing client.

   a. Click on Clients located in the left column of the screen.

   b. Search for the client by entering the client's details or using the Client ID #.



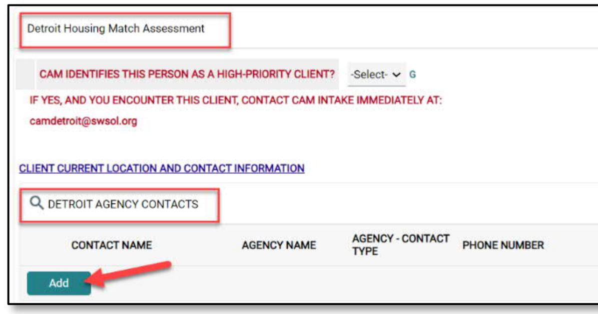
– To search by the Client Name: enter the client details (i.e. first name, last name); click the Search button; and select the client from the Client Results. If the client is located in the search results, click the client's name in the search results.

– To search by the Client ID #: enter the Client ID# and click the Submit button.

Completing the Detroit Housing Match Assessment

1. Navigate to the Summary tab within the client record.

2. Scroll down to the bottom of the Detroit Housing Match Assessment



Documenting Provider Contact Information

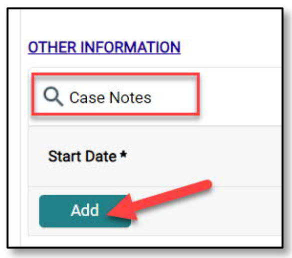
1. Navigate to the Detroit Agency Contacts sub assessment
2. Click Add to record the staff member's contact information.

Documenting Attempts to Contact

1. Navigate to the Other Information/Case Notes section of the Detroit Housing Match Assessment.
2. Click the Add button

   in the Case Note subassessment to add a

   new case note.
3. Click Save when complete.



UPDATING RRH OUTCOMES/CLIENT STATUS (RRH PROJECTS ONLY)

IMPORTANT NOTE

The following steps should only be completed by the Joint RRH project for clients specifically referred by CAM for immediate RRH services.

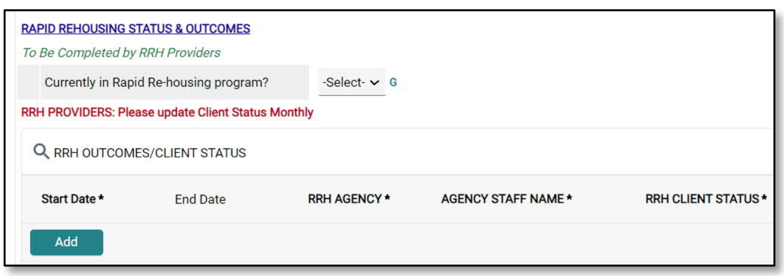
If a client is found ineligible or refuses services at the point of intake. The referral outcome must be set to 'Declined' and the provider must then update the RRH Outcomes/Client Status record on the Detroit Housing Match assessment to reflect the fact that the client was denied RRH and to document the reason for the denial.

If a client is accepted into the program, the referral outcome must be set to 'Accepted' and the provider must update the Detroit Housing Match assessment to reflect the fact that the client is currently in an RRH program. The provider must then use the RRH Outcomes/Client Status record to document the status of the case. <u>While working with the client toward housing, the provider must continue to update the RRH Outcomes/Client Status record once per month or as the client status changes.</u>

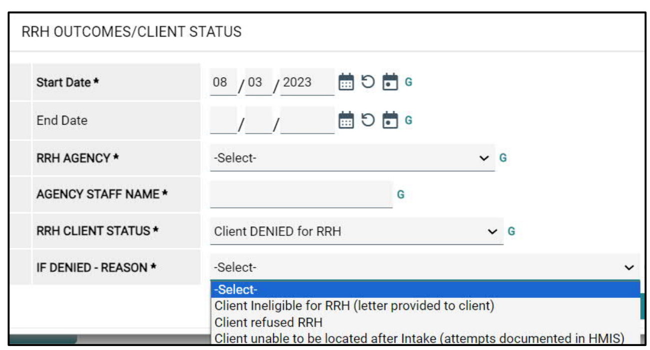
Refer to the Detroit RRH Policies and Procedures manual for more information.

Declined Referrals

1. Navigate to the Summary tab within the client record.
2. Scroll down to the bottom of the Detroit Housing Match Assessment
3. Navigate to the Rapid Rehousing Status & Outcomes section of the Detroit Housing Match Assessment.



4. Click the Add button
   a. Select RRH Agency from the drop down
   b. Enter the Staff Name
   c. RRH Client Status = Client Denied for RRH
   d. If Denied – Reason = Select appropriate response

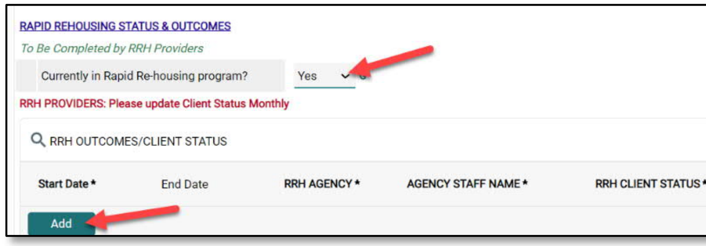


5. Click Save when complete.

Accepted Referrals

Complete the steps below once the intake has been completed and the client is enrolled in the RRH project:

1. Navigate to the Summary tab within the client record.
2. Scroll down to the bottom of the Detroit Housing Match Assessment
3. Navigate to the Rapid Rehousing Status & Outcomes section of the Detroit Housing Match Assessment.



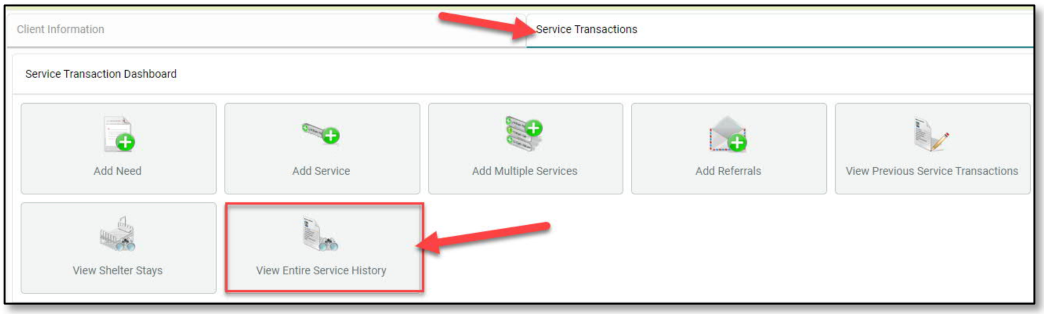
4. Select ‘Yes’ for the ‘Currently in Rapid Rehousing program?’ field.
5. Click the Add button
    a. Select RRH Agency from the drop down
    b. Enter the Staff Name
    c. RRH Client Status = Select appropriate response regarding the status of the case
    d. If Denied – Reason = N/A
6. Click Save when complete

NOTE: While working with the client toward housing, continue to add new RRH Outcome/Client Status records monthly or as changes to the client status occur.

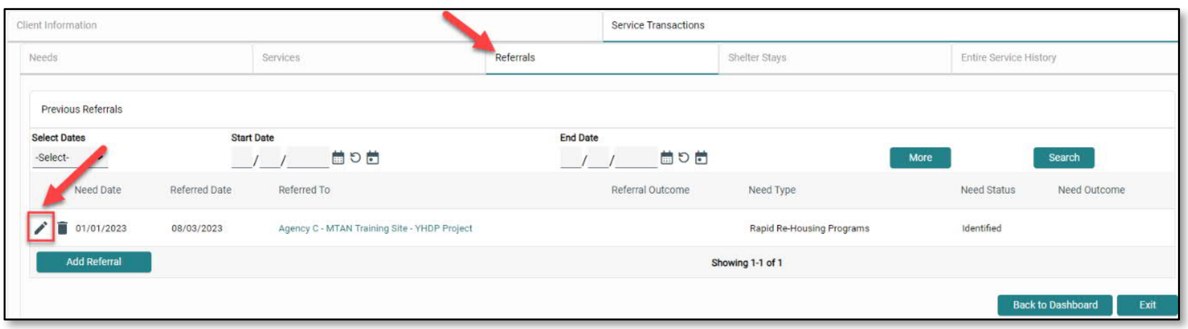
UPDATING THE REFERRAL OUTCOME (WITHIN THE CLIENT RECORD)

The referral outcome must be updated, if not already done, within the Referral Report. To update the referral outcome within the individual client record, complete the steps listed below.

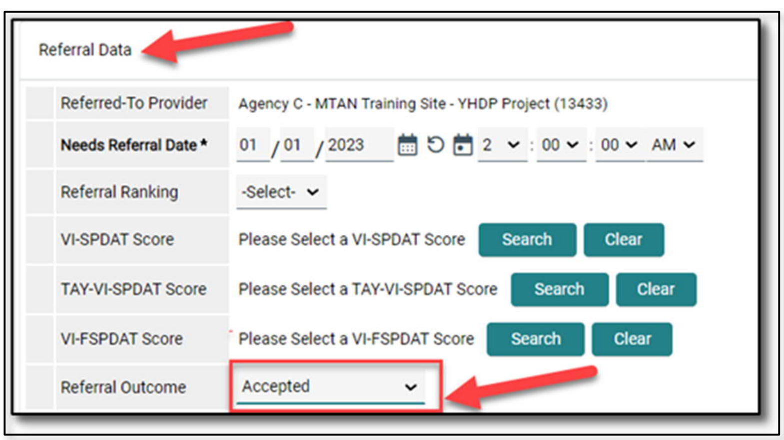
1. Navigate to the Service Transactions tab and select View Entire Service History.



2. Navigate to the Referrals tab and click on the pencil icon next to the open referral.



3. Scroll to the Referral Data section and select the appropriate outcome from the Referral Outcome dropdown menu.

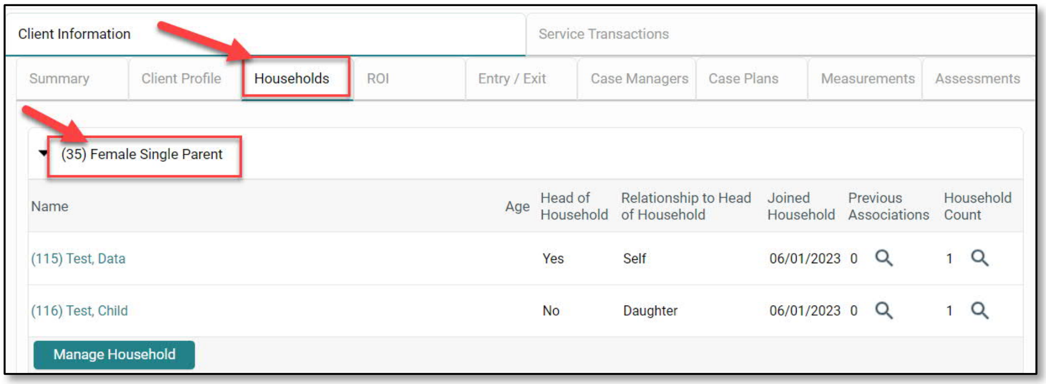


4. Click Save & Exit.

Recording Intake Information

Updating the Household (if necessary)

1. Click on the Household tab to review/edit household information.



NOTE: *If the client is part of a household, all family members must be listed under the Household tab as data entry is required on all members of the family. Households are NOT created for single individuals. For more information on adding/removing household members, refer to [Appendix III: Additional Resources](#).*

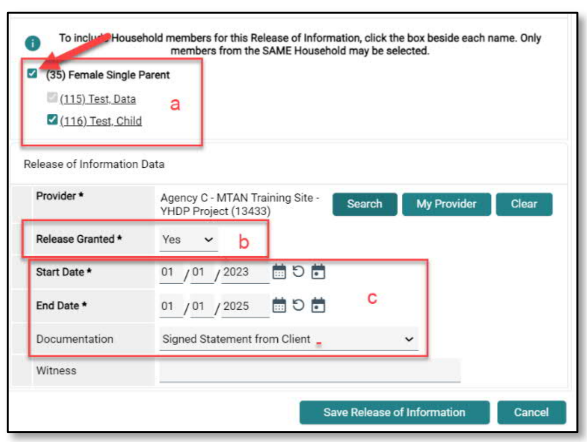
Managing the Visibility of the Client Record

IMPORTANT NOTE

An active electronic release of information (ROI) MUST be in place for data sharing to occur both internally (within the agency) and externally with other community partners (i.e., CAM, Shelters, Navigators, etc.).

Adding an Electronic Release of Information:

1. Click the ROI tab.
2. Click the Add Release of Information button.
   a. Ensure to include all household members (if applicable).
   b. Select Release Granted – 'YES'
   c. Complete the Start Date/End Date and Documentation fields.



NOTE: *If the client refuses to share data with external partners, contact HAND's Help Desk ([https://www.handetroit.org/helpdesk)](https://www.handetroit.org/helpdesk) to request assistance with adjusting the client record to allow only internal sharing.*

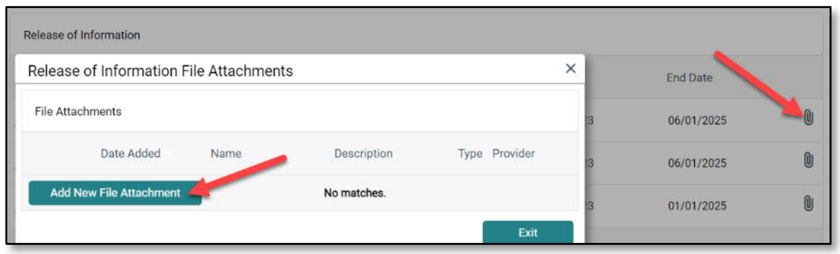
Uploading the Paper Release of Information:

IMPORTANT NOTE

Clients enrolled in both project components (TH & RRH), must have a separate electronic ROI added for each project.

The e-ROI start/end dates for "dual enrollment" clients must align, or the data will not be shared correctly. As such, the Joint TH provider that completes the initial client intake should upload a paper copy of the signed client release to the HMIS for reference.

1. Scan and save a copy of the paper ROI to your computer
2. Locate the appropriate electronic ROI (under the ROI Tab).
3. Click the binder clip (located in the far-right side of the screen)
4. Click 'Add New File Attachment'
5. Click 'Choose File' to find and upload the paper ROI



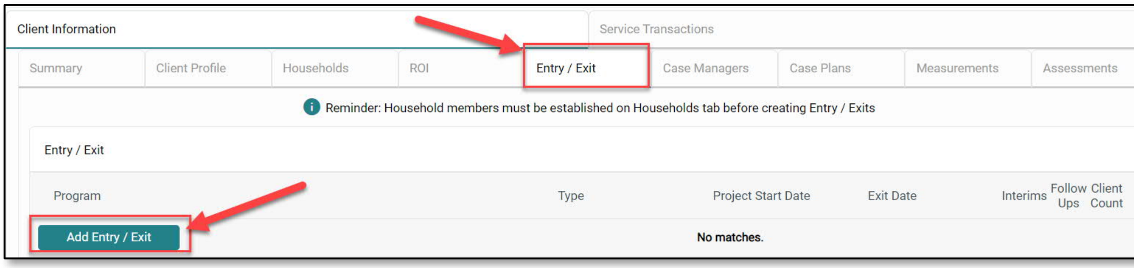
6. In the Description Field, enter *ROI_Date_Client Name* (i.e., ROI_20230401_JSmith)

Creating the Project Entry

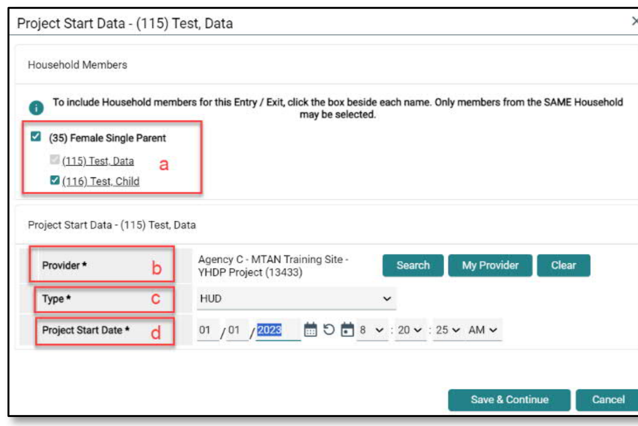
IMPORTANT NOTE

Clients enrolled in both project components (TH & RRH), must have a separate enrollment record, captured in the HMIS, for each project. For more information, refer to the *HMIS Overview for YHDP Joint TH-RRH Projects training* available on HAND's LMS.

1. Navigate to the Entry/Exit tab to add a new Project Entry



2. Click the Add Entry/Exit button to add a new Project Entry.



   a. If household members are present, click the box(s) to select them.

   b. Ensure that the correct Provider Bin is listed.

   NOTE: *If the correct Provider Bin is not listed, then go back to the first step in this workflow and EDA into your YHDP bin.*

   c. Select HUD as the entry Type.

   d. Record the Project Start Date

   - TH: First day client began to stay in the TH facility
   - RRH Dual Enrollment: The first day client began receiving services from the joint component project (i.e., the first day client began to stay in the TH facility).
   - RRH Only: Date client was admitted into the RRH project (i.e., intake date).

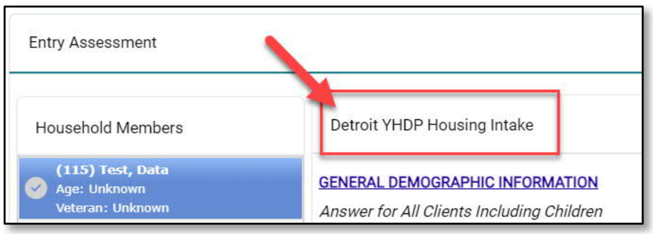
   e. Click Save & Continue.

Completing the Detroit YHDP Housing Intake Assessment

IMPORTANT NOTE

The same intake assessment will be used for clients enrolled in both project components. As long as the electronic ROI is in place, data collected by the project completing the initial intake will be carried over to the partnering project. The partnering provider is still responsible for ensuring that the intake data is complete and accurate as of the project start date.

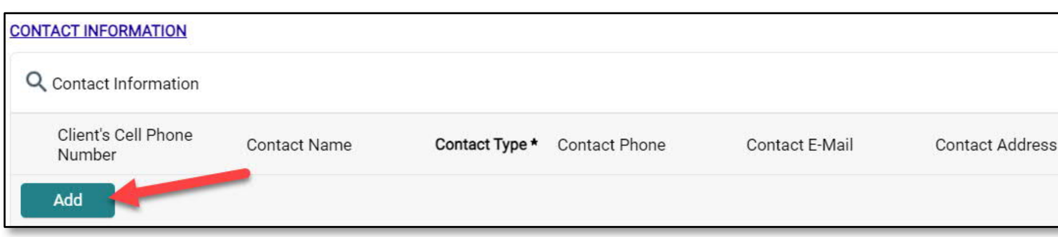
1. Review/Update the following sections of the YHDP Housing Intake Assessment to ensure that all fields have been completed and answers reflect the client's situation at the time of project enrollment.



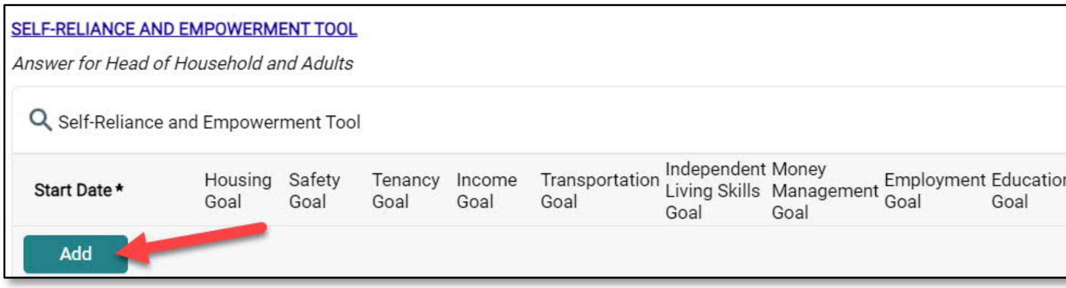
   a. General Demographic Information - All household members, including children.
   b. Health & Disability - All household members, including children.
   c. Housing & Location Information - All household members, including children.
   d. Homeless History Interview - Head of Household and all adults.

      NOTE: *The Prior Living Situation is the living situation that the client was in immediately prior to entering the project. For more information on completing the Homeless History Interview and Determining the Approximate Date of Homelessness, refer to Appendix III: Additional Resources.*

   e. Income & Non-Cash Benefit Information - Head of Household and all Adults.
   f. Employment, Education, Domestic Violence, Foster Care and Juvenile Justice Information - Head of Household and all adults.
   g. Add new Contact Information details (if applicable) for the Head of Household only.



h. Record the initial Self-Reliance & Empowerment (SR&E) Tool scores (Head of Household and all adults).



NOTE: *The Joint TH project will complete the SR&E tool with all "dual enrollment" clients <u>while clients are residing in the TH facility</u>. If the RRH provider is also working with the client on specific goals, the RRH provider <u>may</u> choose to create an SR&E record in the RRH bin as well (using the domain scores obtained from TH and documenting the specific RRH goals the client is working on).*

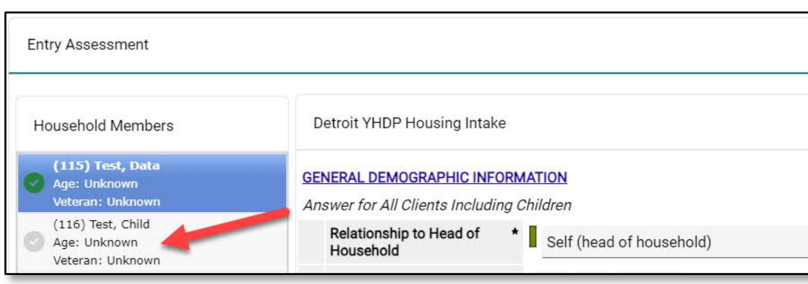
i. Record new Current Living Situation details for the Head of Household and all adults.

2. Click Save.

3. Complete the Detroit YHDP Housing Intake assessment for each additional household member, if applicable.

   a. Click the name of the Household member located in the Household Member's column of the assessment.

   b. Verify/complete the above-referenced fields, as applicable, for the selected household member.



   c. Click Save.

   d. Click on the name of another household member and repeat the process, if applicable.

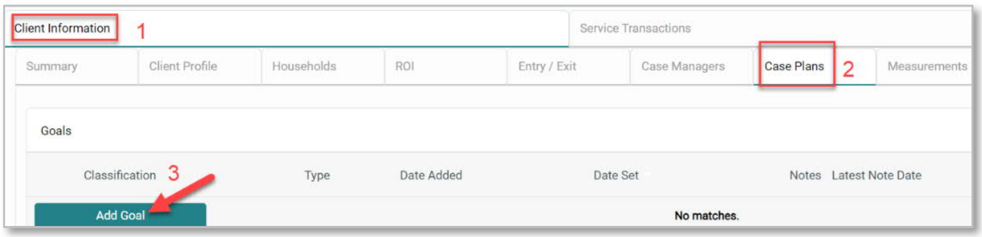
   e. Go back to the Head of Household record, when you have finished entering data for all household members. Click Save & Exit.

IMPORTANT NOTE

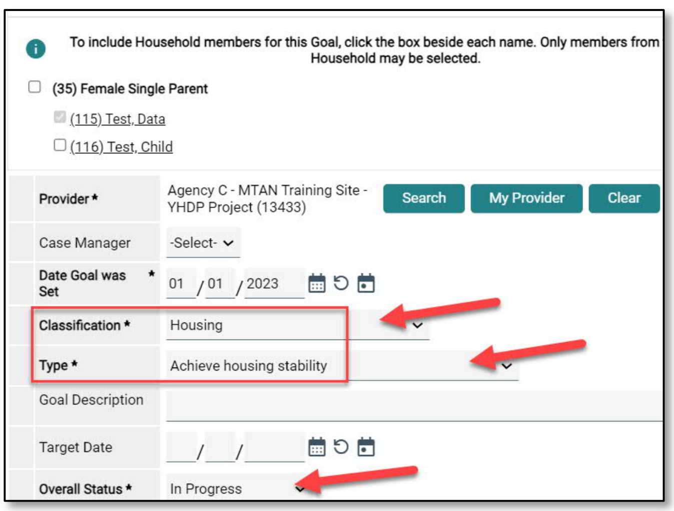
Joint TH-RRH providers are required to document client case notes in the HMIS. As such, at a minimum, providers must create a high-level 'Housing' Goal for the Head of Household where case notes can be recorded.

The Housing Goal and case notes only need to be completed in the Joint TH bin for "dual enrollment" clients who are not actively receiving RRH services.

1. Navigate to the Client Information tab.
2. Select the Case Plans tab to add client goals and case notes.



3. Click the Add Goal button.
   a. Ensure at a minimum the following required fields are completed.
      – Date Goal was Set.
      – Classification = Housing
      – Type = Achieve Housing Stability.
      – Overall Status – In Progress.

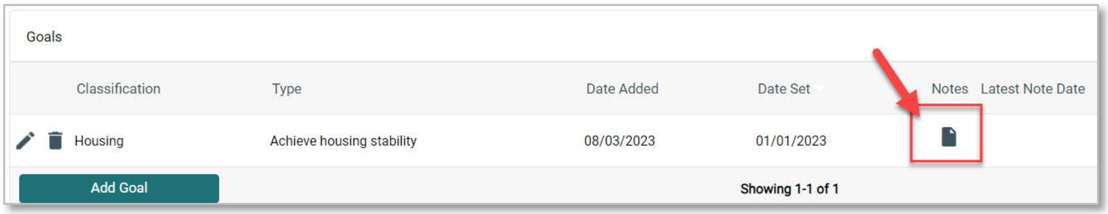


   b. Click Add Goal.
   c. Click Add Case Note to add the initial case notes pertaining to this goal.
   d. Click Save Case Note.

Adding Additional Case Notes

To add additional case notes to the existing goal:

1. Navigate to the Case Plans tab and click the Notes icon for the Goal.



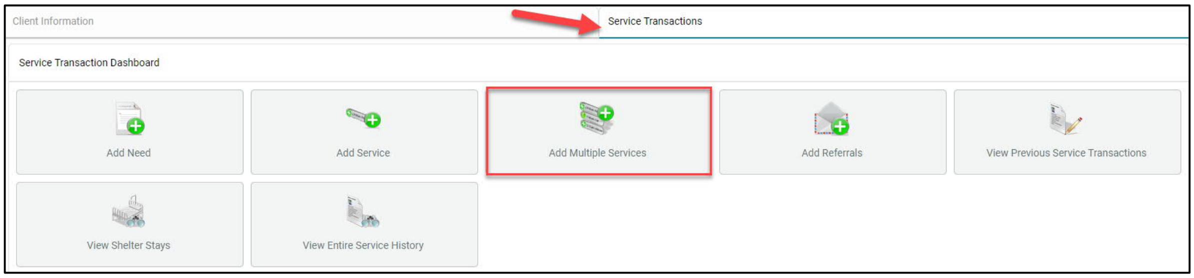
2. Click the Add Case Note button to open another window to add the case note.
3. Add the Case Note and Save.

Recording Service Transactions

IMPORTANT NOTE

Tracking service transactions in the HMIS is optional for transitional housing projects. However, at a minimum, RRH projects are required to track financial services in the HMIS.

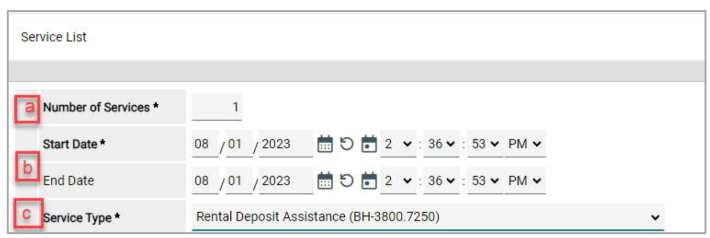
1. Click on the Service Transactions tab
2. Select Add Multiple Services



3. Add applicable household members to the service transaction as appropriate by checking the box next to the household member's name.

   NOTE: *Financial assistance services should only be entered for the head of household. Including other household members will inflate the total cost of financial assistance provided on service reports.*

4. Ensure the Service Provider is correctly displayed.
5. Scroll down to Service List section



   a. Leave the Number of Services set to 1
   b. Establish the Start and End date for the service.

   NOTE: *Most service transactions should be dated for the day the funds were administered and/or the service was provided. In many cases, the start and end date will be the same day.*

   For ongoing Rent Payment Assistance, the service transaction should cover the entire month to which the payment was applied. The start date should be the first of the month (or the payment start date if the client moved in after the 1st) and the end date should be the end of the month. For example, if a household receives rent payment assistance from July-September, the head of household should have three separate rent payment assistance service transactions with the following start and end dates: 07/01/2023-07/31/2023, 8/1/2023-8/31/2023, and 9/1/2023-9/30/2023

   c. Select the Service Type by clicking the Pencil Icon and choosing the appropriate service from the dropdown list of options.

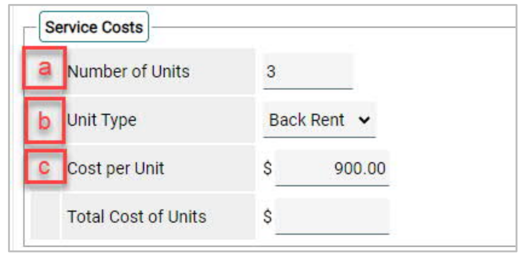
   NOTE: *To record rent arrearage assistance, select the Rent Payment Assistance Service Type and complete the Service Cost section (see Step 6 below).*

6. For Back Rent/Back Utility Payments ONLY - Scroll down to Service Costs section (otherwise skip to Step 7)

    a. Enter the Number of Units (i.e., months) being covered for back rent or back utility

    b. Select the appropriate Unit Type from the drop-down menu (back rent or utility arrearage)

    c. Add the Cost Per Unit (i.e., total rent per month)



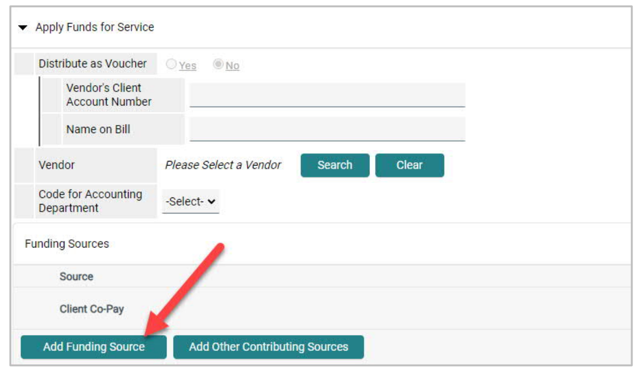
NOTE: *The Total Cost of Units will be calculated automatically upon Save & Exit*

7. For Financial Services Only – Scroll down and click the arrow next to the Apply Funds for Services section to expand (otherwise skip to Step 8)

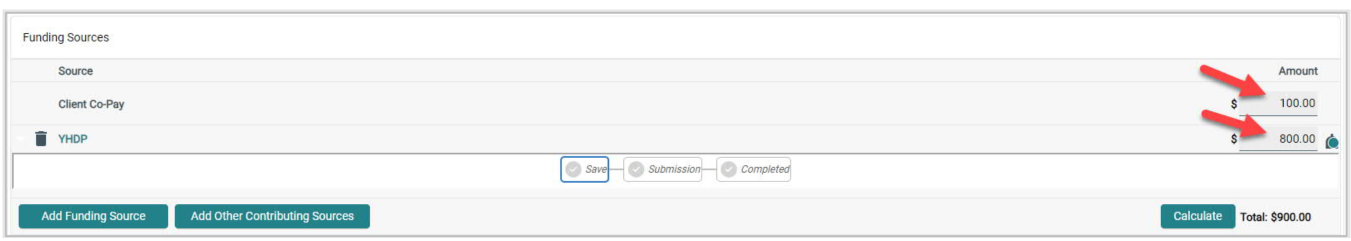
    a. Scroll down to Funding Sources and click Add Funding Source

    b. Use the Fund Search option to search for the YHDP funding source

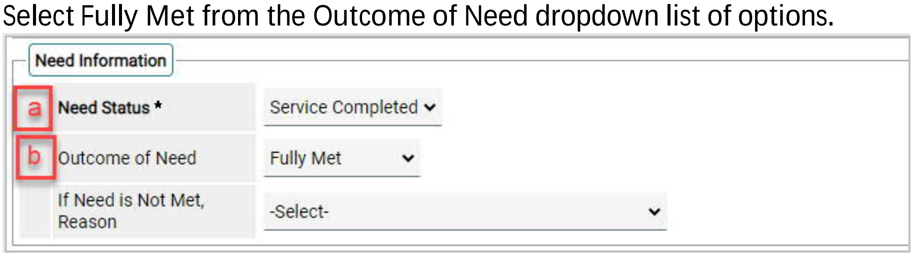
    c. Click the plus sign icon to select the YHDP funding source.



    d. Enter the financial amount of the YHDP service along with the Client Co-Pay, if applicable.



8. Navigate to the Need Information section.
    a. Select Service Completed from the Need Status dropdown list of options.
    b. Select Fully Met from the Outcome of Need dropdown list of options.



9. Click the Add Another button to add additional services, if applicable.

10. Click Save & Exit once all services are added

UPDATING AND MAINTAINING THE CLIENT RECORD

IMPORTANT NOTE

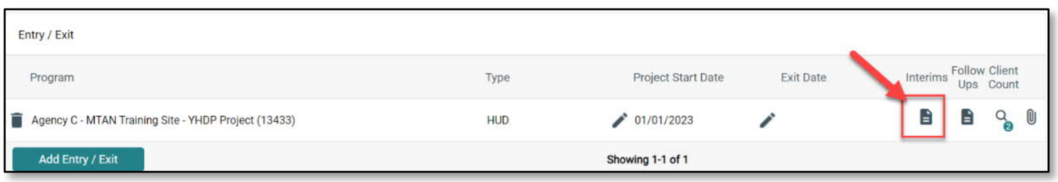
HMIS records should remain "open" (i.e., no project exit date recorded) while clients are still actively receiving services. During this time, it is important that the records are updated and maintained. This includes adding new ROIs, recording new data elements (collected after project start), updating assessment data to reflect changes in the client's circumstances, completing Annual Assessment updates, and documenting ongoing case notes.

For clients receiving RRH services, this also includes capturing [financial service transactions] and [Updating RRH Outcomes/Client Status] information.

COMPLETING ROUTINE UPDATE INTERIM REVIEWS

1. Add an Interim review to the program entry as follows:

   a. Navigate to the Entry/Exit tab and click the icon in the Interims column of your open YHDP Program Entry.



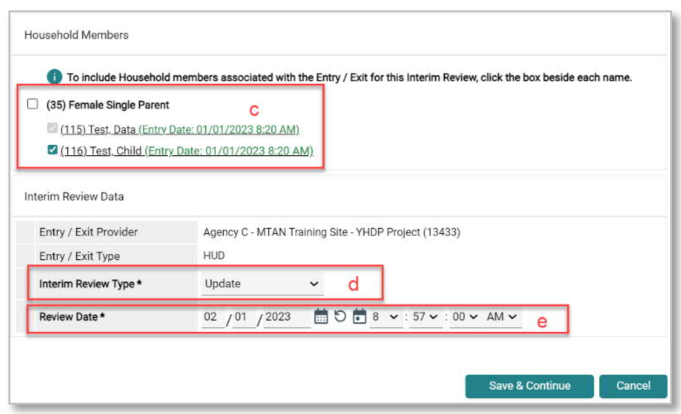
   b. Click Add Interim Review.

   c. Check all relevant household members for which the review is relevant; check the Household type to choose all household members.

   d. Select Update from the Interim Review Type dropdown list of options.

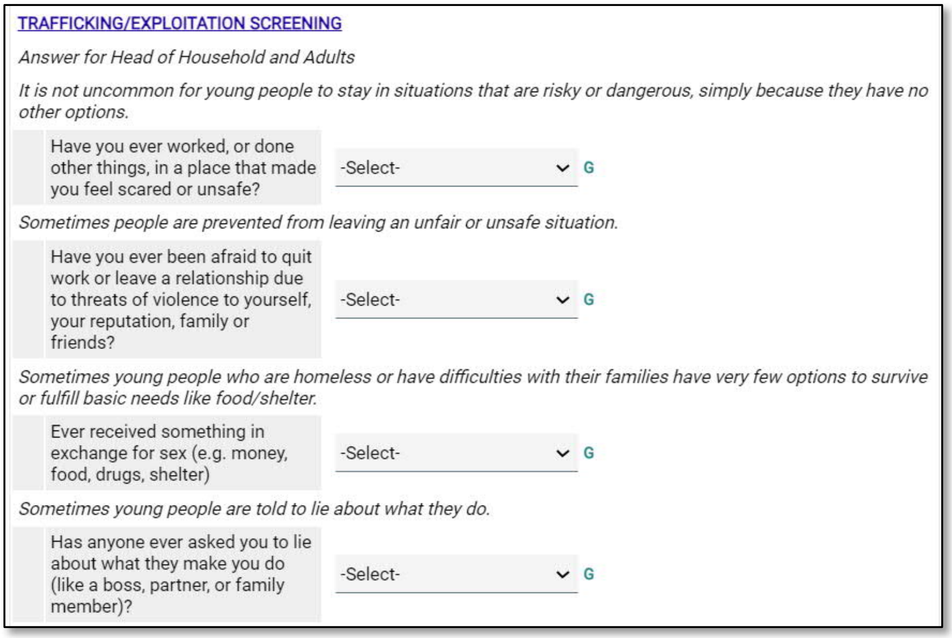
   e. Ensure the Review Date is set to the date that the change occurred.

   f. Click Save & Continue to proceed to the Detroit YHDP Update Assessment.



Completing Trafficking/Exploitation Screening

YHDP Housing Providers must attempt to complete the Trafficking/Exploitation Screening with all youth once a relationship has been established. Providers should use the script provided on the Detroit YHDP Update Assessment to elicit responses to the four screening questions listed below.


TRAFFICKING/EXPLOITATION SCREENING

Answer for Head of Household and Adults

It is not uncommon for young people to stay in situations that are risky or dangerous, simply because they have no other options.

Have you ever worked, or done other things, in a place that made you feel scared or unsafe?	-Select-

Sometimes people are prevented from leaving an unfair or unsafe situation.

Have you ever been afraid to quit work or leave a relationship due to threats of violence to yourself, your reputation, family or friends?	-Select-

Sometimes young people who are homeless or have difficulties with their families have very few options to survive or fulfill basic needs like food/shelter.

Ever received something in exchange for sex (e.g. money, food, drugs, shelter)	-Select-

Sometimes young people are told to lie about what they do.

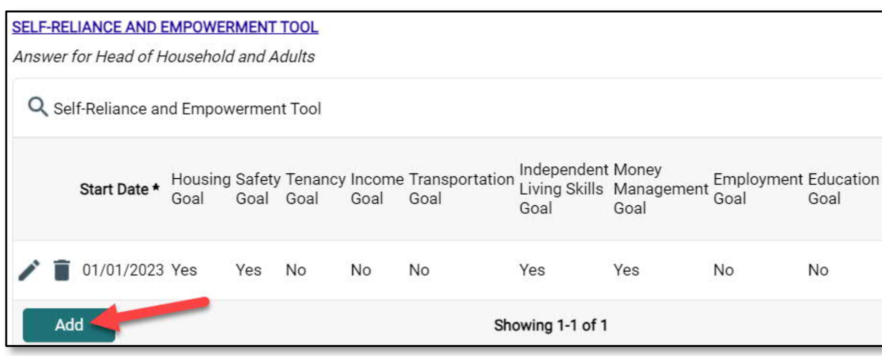
Has anyone ever asked you to lie about what they make you do (like a boss, partner, or family member)?	-Select-

NOTE: *Trafficking/Exploitation Screening will be completed by the Joint TH project for all "dual enrollment" clients.*

Recording New Self-Reliance & Empowerment Tool Scores

A <u>new</u> Self-Reliance & Empowerment (SR&E) assessment must be completed every quarter, <u>at a minimum</u>. Do <u>not</u> end date, overwrite, delete, or edit the initial intake SR&E record.

1. Navigate to the Self-Reliance and Empowerment Tool section of the update assessment.
2. Click Add to create a new record.


SELF-RELIANCE AND EMPOWERMENT TOOL

Answer for Head of Household and Adults

Self-Reliance and Empowerment Tool

Start Date *	Housing Goal	Safety Goal	Tenancy Goal	Income Goal	Transportation Goal	Independent Living Skills Goal	Money Management Goal	Employment Goal	Education Goal
01/01/2023	Yes	Yes	No	No	No	Yes	Yes	No	No

Add

Showing 1-1 of 1

Updating Static Assessment Data

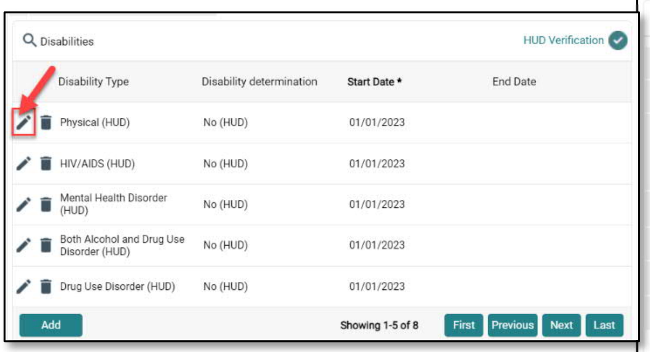
To record changes to static assessment data:

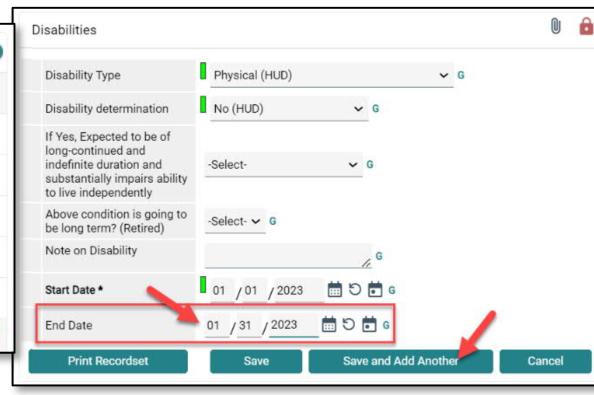
1. Navigate to the assessment question that needs to be updated
    a. Adjust the dropdown response to reflect the updated status.
    b. Clicking the colored bar icon next to the assessment question provides historical response data.

Updating HUD Sub Assessment Data

It is important to <u>never</u> overwrite HUD's sub assessment records! Each time there is a change in *income*, *noncash benefits, health insurance*, and/or *disability information*, a new record must be added.

1. Locate and click the edit pencil next to the sub assessment record that needs updating.

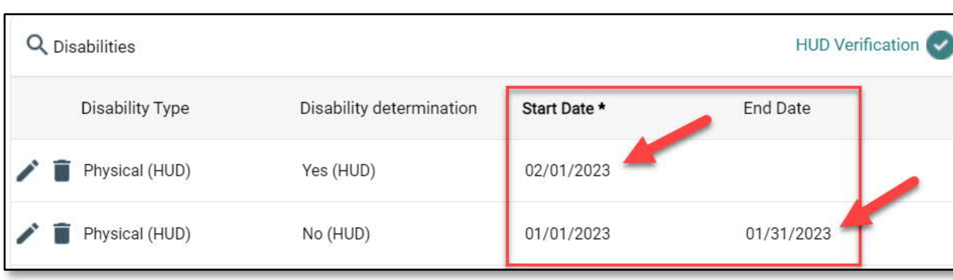




2. Add an end date to the current record (i.e., the day before the change occurred) to indicate that the information is no longer accurate as of that date. Click Save and Add Another to record the new information.

3. Record new income information. Complete all required fields to reflect the change that occurred and click Save

4. Verify that the start and end dates for the sub assessment records you updated do not overlap.



5. Be sure to update the sub assessment gateway question(s) if applicable

Recording the Housing Move-In Date (RRH ONLY)

All RRH and PSH projects must create an *Update Interim Review* to record the Housing Move-In Date (HMD) when a client first moves into a unit. The Interim Review Date must be the same as the Housing Move-In Date.

REMEMBER to update the *RRH Outcomes/Client Status* and Current Living Situation!!

NOTE: *There should be only one HMD recorded per project enrollment. If a client loses housing after moving into a unit, the client record should be closed, and a new project enrollment should be created for the following day. The HMD on the new enrollment should be left blank until the client moves into a new permanent housing situation.*

NOTE: *Joint component RRH projects: Only clients who move into a permanent housing unit using associated YHDP RRH resources should have an HMD recorded in the project. This guidance differs from that of traditional RRH and PSH, where an HMD should be recorded for clients who move into any permanent housing situation, regardless of whether financial assistance is provided.*

COMPLETING ANNUAL ASSESSMENT INTERIM REVIEWS

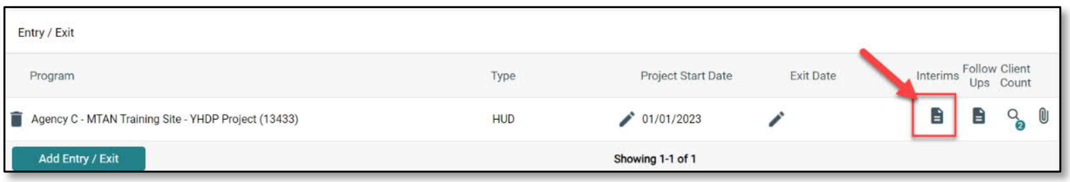
IMPORTANT NOTE

Annual Assessments must be completed at least once a year for all household members who receive services for 365 days or more. Annual Assessments must be completed no more than 30 days before or after the anniversary of the head of household's Project Start Date.

Clients with enrollments in both projects must have a separate Annual Review record for each project. Providers should coordinate efforts to obtain the information needed from the client to complete the Annual Review.

1. Add an Interim review to the program entry as follows:

   a. Navigate to the Entry/Exit tab and click the icon in the Interims column of your open YHDP Program Entry.

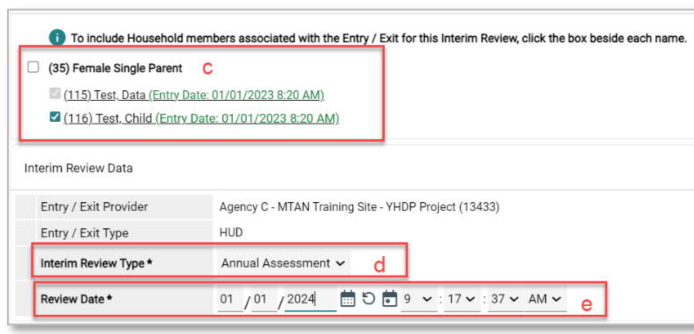


   b. Click Add Interim Review.

   c. Check the box to include all relevant household members.

   d. Select Annual Assessment from the Interim Review Type dropdown list of options.

   e. Ensure the Review Date is set to the date that the change occurred.



   f. Click Save & Continue to proceed to the Detroit YHDP Update Assessment.

   g. Update income, non-cash benefit, and health insurance information regardless of whether responses have changed since the project start or previous annual assessment.

   NOTE: *A new record must be created for each subsequent annual assessment such that it is possible to view the history, by date, of the values for each data element. See Updating HUD Sub Assessment Data for more information.*

EXITING THE CLIENT

IMPORTANT REMINDER

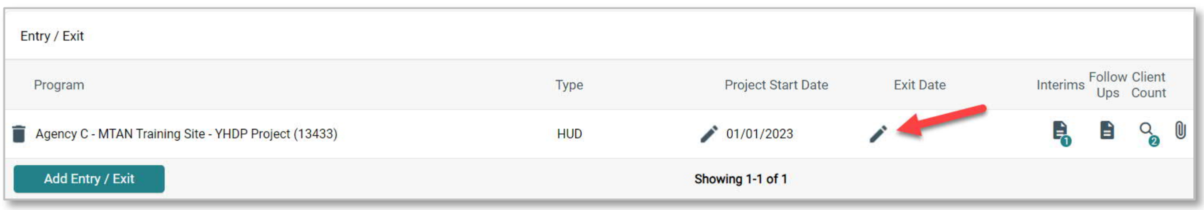
TH clients should be exited from the Joint TH bin on the day they leave the TH facility.

Clients that exit Joint TH <u>without</u> transitioning to Joint RRH, should be closed out of both HMIS bins (TH & RRH) on the day they leave the TH facility. The Joint TH provider is responsible for notifying the Joint RRH provider when clients exit transitional housing to another destination.

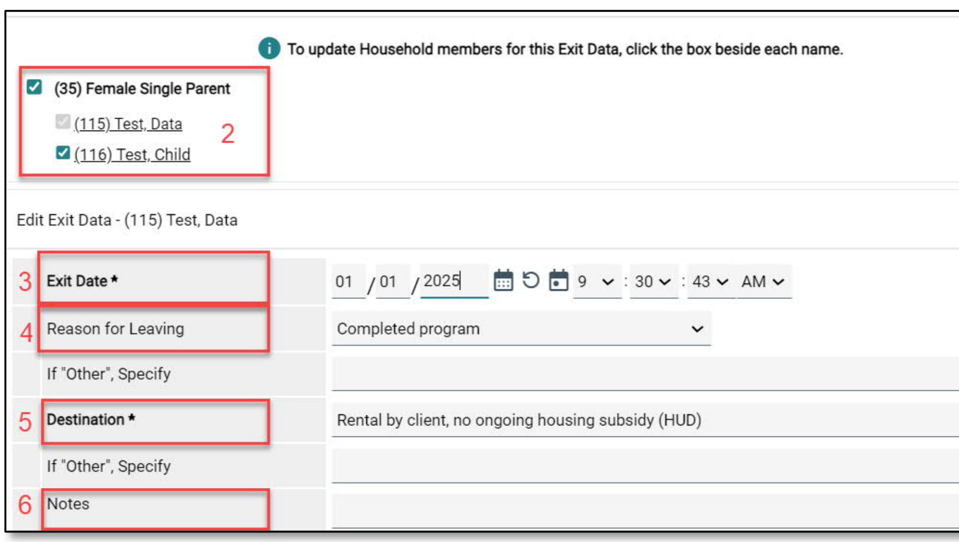
Joint RRH clients who have been housed and subsequently lose housing while still actively participating in the project must be exited from the Joint RRH project on the day they lose housing, and a new Joint RRH enrollment should be created for the following day.

RECORDING CLIENT DISCHARGE INFORMATION

1. Click the pencil next to the Exit Date in the Entry/Exit screen.



2. Check the box to include all household members, if applicable.
3. Add the Exit Date,
4. Select the Reason for Leaving from the dropdown list of options.
5. Select the appropriate Destination from the drop-down list of options.
6. Add Notes, if applicable.



7. Scroll down to the Detroit YHDP Exit Assessment
    a. Record the Project Completion Status (new data element collected at exit) for the Head of Household and any adults.
    b. Complete the Safe and Appropriate Exit Information (new data element collected at exit) for the Head of Household and any adults.
    c. Update the Health Status Information for the Head of Household and any adults to reflect the status at the time of exit.
    d. Create a new Self-Reliance & Empowerment Tool record to capture the client status for each domain at exit.
    e. Update any other information that may have changed for the clients since the Project Start or last interim review.
8. Click Save.
9. Complete the Detroit YHDP Exit assessment for each additional household member, if applicable.
    a. Click the name of the Household member located in the Household Member's column of the assessment.

    b. Verify/complete the above-referenced fields, as applicable, for the selected household member.
    c. Click Save.
    d. Click on the name of another household member and repeat the process, if applicable.
    e. Go back to the Head of Household record when you have finished entering data for all household members.
    f. Click Save & Exit.

RECORDING AFTERCARE ACTIVITY

IMPORTANT NOTE

Youth participating in Detroit's YHDP housing-related projects are eligible to receive up to 12 months of aftercare services.

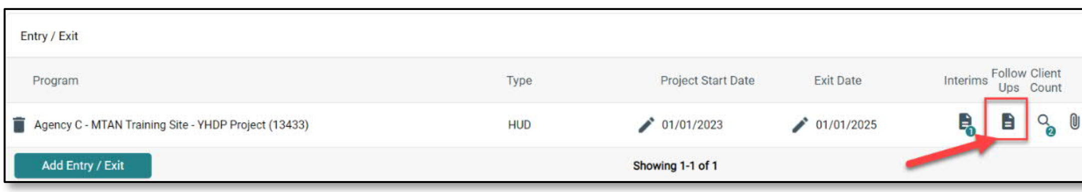
The depth and breadth of services provided will vary depending on the need. Providers should use the Self-Reliance & Empowerment Tool, in conjunction with youth input, to determine the length and extent of services needed.

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services and complete a new Self-Reliance & Empowerment assessment each quarter.

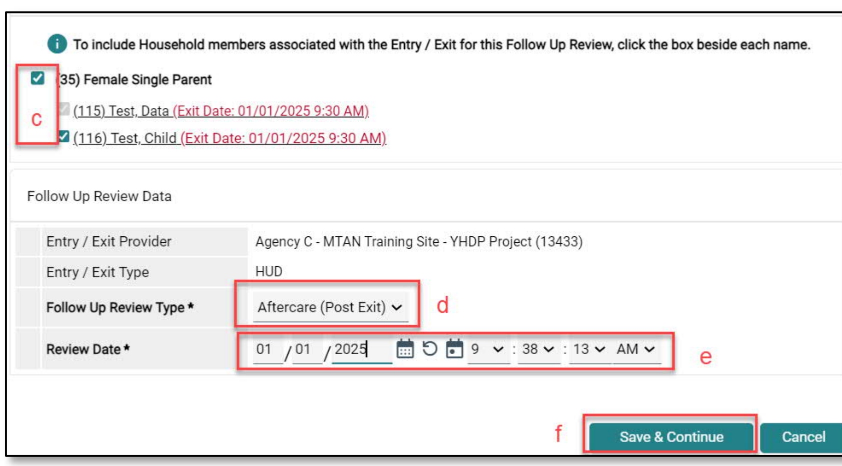
Youth are not required to receive aftercare and may decline services if they wish. However, each client discharged from services must have at least one aftercare record entered in the HMIS indicating whether services were provided.

CREATING THE MANDATORY AFTERCARE RECORD

1. Add a Follow Up record after project exit as follows:
   a. Navigate to the Entry/Exit tab and click the icon in the Follow Ups column



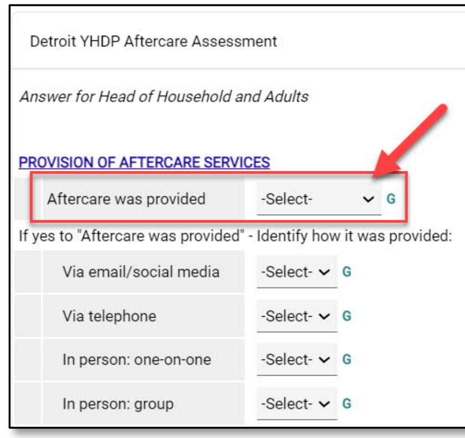
   b. Click Add Follow Up Review.
   c. Check the box to include all relevant household members.
   d. Select Aftercare (Post Exit) from the Follow Up Review Type dropdown list of options.
   e. Ensure the Review Date is set to the date that the follow-up occurred (or the exit date for households NOT receiving aftercare services).



   f. Click Save & Continue to proceed to the Detroit YHDP Aftercare Assessment.

Completing Assessment for Clients NOT Receiving Aftercare

1. Navigate to the Provision of Aftercare Services section of the Detroit YHDP Aftercare Assessment.
    a. Select No from the dropdown list next to the 'Aftercare was provided' question.
    b. Scroll to the bottom of the assessment and click Save



2. Complete the steps above for all adults in the household
    a. Click Save & Exit when finished.

Completing Assessment for Clients Receiving Aftercare

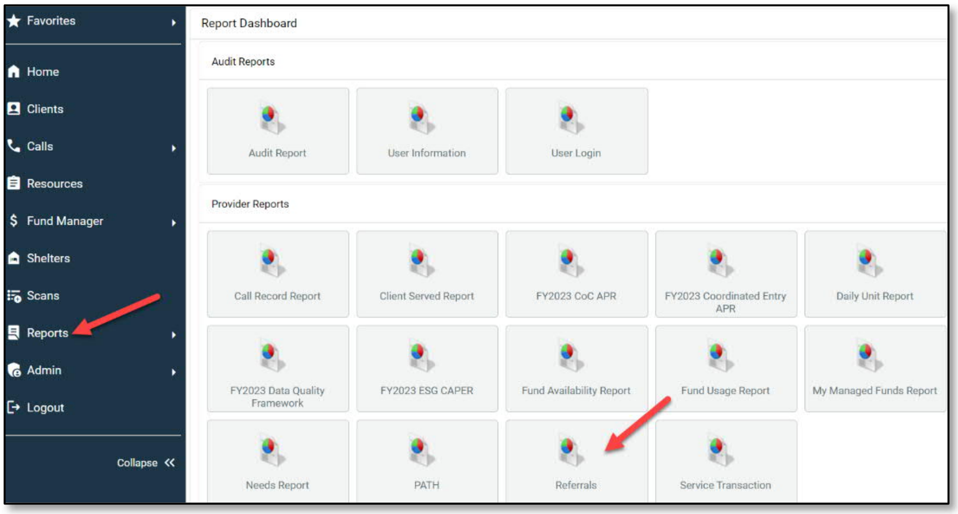
> IMPORTANT NOTE
>
> *At a minimum, providers should conduct monthly home visits with clients receiving aftercare services. A new HMIS follow-up record should be completed at each home visit. Providers may have more frequent contact with clients. However, it is not necessary to create a new follow-up record for each contact. Providers can document the additional types of contact that they had with the client between visits on the monthly aftercare record.*

1. Complete the following sections of the Detroit YHDP Aftercare Assessment
    - Provision of Aftercare Services – Select Yes for the 'Aftercare was provided' field and document all the ways that aftercare was provided throughout the month.
    - Housing Stability –
        i. Create a new Current Living Situation record if the client's living situation has changed.
        ii. Answer/Update the 'Has the client remained housed' field
        iii. Answer/Update the 'Is the client experiencing difficulty maintaining housing' question and record any applicable notes.
    - Self-Reliance & Empowerment Tool – Record new SR&E responses each quarter (at a minimum).
    - Client Status Updates – Update any information that has changed for the client with regard to contact information, pregnancy status, income & noncash benefits, employment and/or education.
2. Scroll to the bottom of the assessment and click Save
3. Complete the steps above for all adults in the household
4. Click Save & Exit when finished.

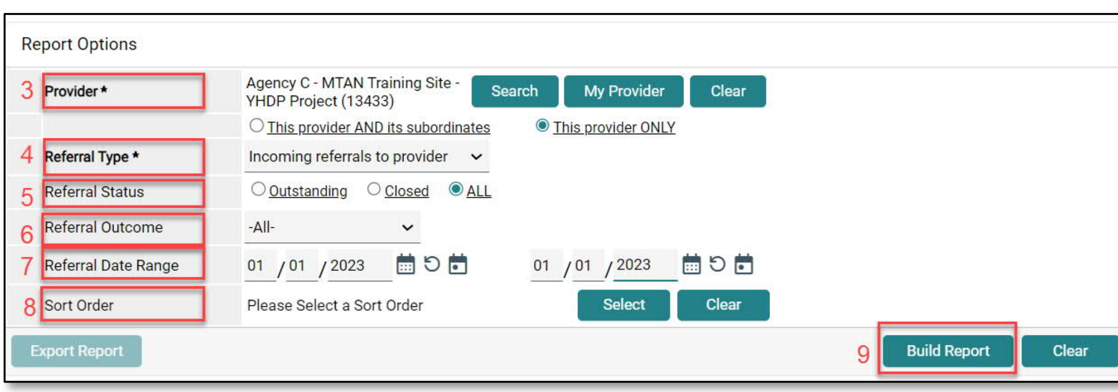
Appendix I: Running Referral Report & Updating Outcomes

Running the Referral Report

1. Click on the Reports tab
2. Click the Referrals report



3. Ensure the correct provider is selected
4. Referral Type = Incoming Referrals
5. Referral Status = All
6. Referral Outcome = All
7. Enter Referral Date Range
8. Select desired Sort Order (Optional)
9. Click Build Report (report results will display)

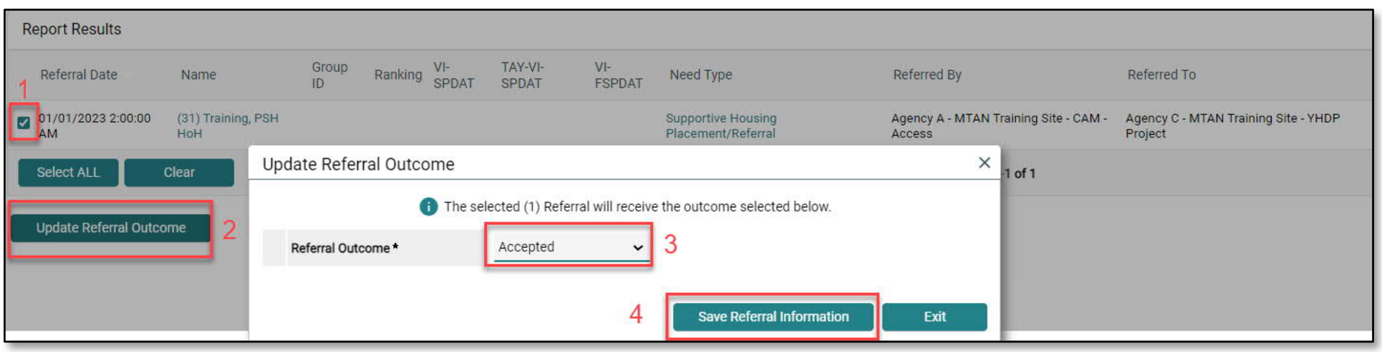


UPDATING REFERRAL OUTCOMES (WITHIN THE REFERRAL REPORT)

IMPORTANT NOTE

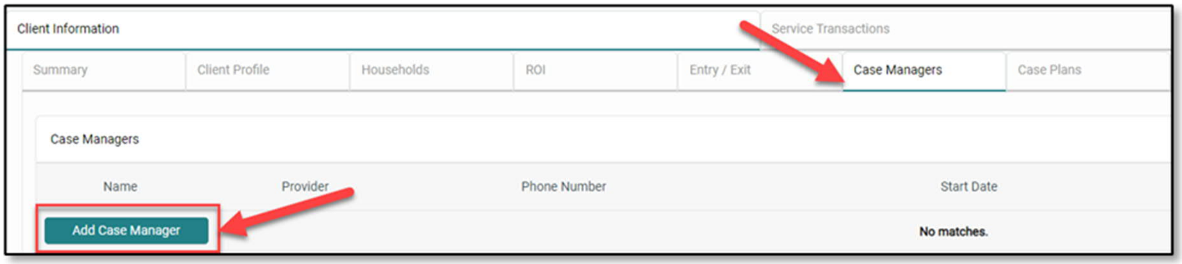
Only those with an Agency Admin license or higher will have the option to update referral outcomes within the Referral Report. Case managers and those with a lower level of access will only be able to update referral outcomes for individual clients within the client record. For more information, refer to the [*Updating the Referral Outcome (within the Client Record)*]() *section of this process guide.*

1. Check the box next to the name(s) of the clients with a known referral outcome
2. Click the Update Referral Outcome button located at the bottom of the Referral Results list
3. Select the appropriate Referral Outcome from the dropdown list
    a. Accepted: if client is accepted into the project
    b. Declined: if the project declines the referral due to ineligibility
    c. Canceled: if the project is unable to contact client or the client declines services
4. Click Save Referral Information

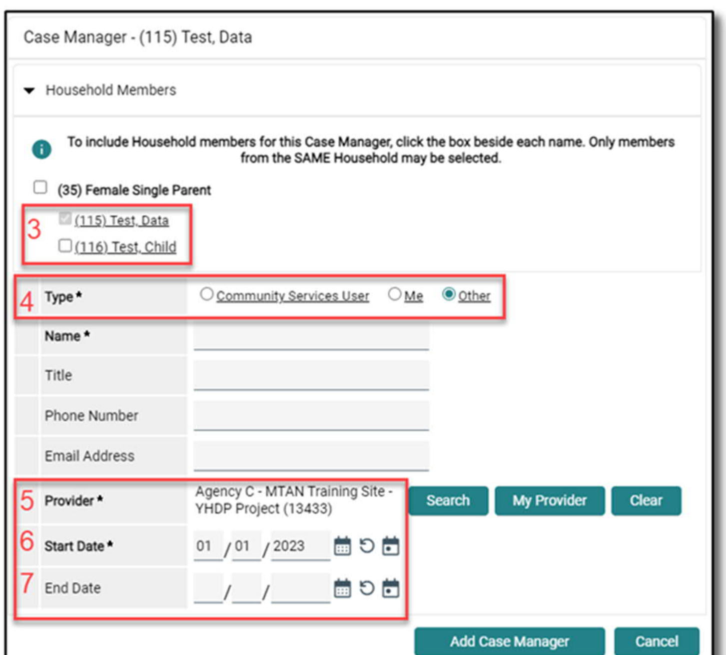


APPENDIX II: ASSIGNING A CASE MANAGER (OPTIONAL)

1. Navigate to the Case Managers tab
2. Click 'Add Case Manager'



3. Check the box to include all household members (if applicable)
4. Select Type
    a. Other: Allows users to manually enter Case Manager details (use if the Case Manager is not the same person that is completing the data entry).
    b. Me: Auto-populates the Case Manager details for the individual completing the data entry.
5. Ensure that the correct Provider is listed (i.e. YHDP RRH project)
6. Ensure that the correct Start Date is listed
7. Leave the End Date blank (until the case manager is no longer working with the client).



APPENDIX III: ADDITIONAL RESOURCES

Resource Type	Description	URL
Job Aid: Creating and Managing Households	Step-by-step instructions: - Creating a new household - Adding new members to an existing household/entry - Removing members when they leave a household	https://handetroit.box.com/s/6kl3oz5gxz8vyquxzv5n4h4gok5knuz6
Homeless History Interview Guide	Detailed guidance for completing the Homeless History Interview section of the HMIS Intake Assessment.	
Determining Approximate Date of Homelessness	Examples of follow-up questions that should be asked of clients when completing the Homeless History Interview to help ensure the correct date is entered in HMIS for the client's approximate date of homelessness.	
Running, Reviewing, and Printing the CoC APR	Step-by-step instructions for running and printing the CoC APR as well as detailed guidance for finding and fixing common errors within the COC APR.	
Finding & Fixing Errors in APR	Detailed instructions for interpreting and fixing errors within the CoC APR.	
Permanent Housing Entry/Exit & Move-In Guidance	Detailed guidance regarding the nuances surrounding PSH/RRH referrals, project start dates, housing move-in dates, and project exits. In addition to detailed guidance for managing transfer clients and housing displacements.	https://handetroit.box.com/s/glogsxibwju33u4tkzdhkduopf2clyeq
HMIS Overview for YHDP Joint TH-RRH Projects	Presentation slides providing an overview of Detroit's Joint TH-RRH project, including the CAM referral workflow and specific HMIS enrollment scenarios for Joint TH-RRH.	https://handetroit.box.com/s/gk4p6gs4tnp37r9ifyd1ja0bj4rc2g2a

APPENDIX IV: YHDP JOINT RRH HMIS DATA ENTRY CHECKLIST

Below is a high-level overview of the HMIS workflow requirements for Joint RRH projects.

Receive Referral

- ✓ EDA into the RRH YHDP Bin (if not defaulted there)
- ✓ Run Referrals Report
- ✓ Access the Client Record
- ✓ Complete the Detroit Housing Match Assessment sections below (on the Client Summary Tab):
  - ✓ Detroit Agency Contacts
  - ✓ Case Notes (document attempts made to contact client)
  - ✓ RRH Outcomes/Client

    NOTE*:* *<u>For Accepted Clients</u>: While working with clients toward housing, the provider must continue to update the RRH Outcomes/Client Status record <u>once per month</u> or as the client status changes.*
- ✓ Update the Referral Outcome
  - <u>Cancelled/Declined Referrals</u> – End of the HMIS Workflow
  - <u>Accepted Referrals</u> – Proceed to Record Intake Information

Record Intake Information

- ✓ Review/Edit Household (if applicable)
- ✓ Add electronic ROI (Release of Information), including all HH members (if applicable)
- ✓ Record (HUD) Project Entry for all HH members (if applicable)
  - – <u>RRH Dual Enrollment</u>: The first day client began receiving services from the joint component project (i.e., the first day client began to stay in the TH facility).
  - – <u>RRH Only</u>: Date client was admitted into the RRH project (i.e., intake date).
- ✓ Review/Update Detroit YHDP Housing Intake Assessment questions for all HH members (if applicable)
  - ✓ Add the initial SR&E Tool Record

    NOTE: *The Joint TH project will complete the SR&E tool with all "dual enrollment" clients <u>while clients are residing in the TH facility</u>. If the RRH provider is also working with the client on specific goals, the RRH provider <u>may</u> choose to create an SR&E record in the RRH bin as well (using the domain scores obtained from TH and documenting the specific RRH goals the client is working on).*
- ✓ Create a Case Plan and document Initial Case Notes
  - Goal Classification: Housing
  - Goal Type: Achieve Housing Stability
  - Status: In Progress
  - Record Case Note

    NOTE: *Case Plans/Notes only need to be completed in the Joint TH bin for "dual enrollment" clients who are <u>not</u> actively receiving RRH services.*
- ✓ Record Service Transactions

Update & Maintain Client Record

- ✓ Add Update Interim Reviews
    - Complete Trafficking/Exploitation Screening (after relationship has been established)
    - Record Housing Move-In Date (after client moves into a unit)

        NOTE: *Also remember to update the* RRH Outcomes/Client Status *and Current Living Situation when clients move into project-funded housing.*

    - Record quarterly SR&E tool scores
- ✓ Continue to update the client record to reflect changes (i.e., income, non-cash benefits, current living situation, and contact information, etc.)
- ✓ Document ongoing case notes (minimum one per month)
- ✓ Record additional services (as applicable)
- ✓ Complete Annual Assessments (as applicable)
    - Complete a new Annual Assessment for all household members (30 days +/- the anniversary of the head of household's Project Start Date)

Exit the Client from Project

- ✓ Record Project Exit Date = Date client leaves the RRH unit and/or stops receiving ongoing case management services from the project.
    - Document Reason for Leaving and Destination
    - Complete the Detroit YHDP Exit Assessment including
        - Project Completion Status (New discharge fields)
        - Safe and Appropriate Exit Information (New discharge fields)
        - Health Status (update responses given at entry)
        - Self-Reliance & Empowerment Tool (New record created at exit)
        - Update any data elements that have changed since entry (or last interim review)

Record Aftercare Activity

IMPORTANT NOTE

Youth participating in Detroit's YHDP housing-related projects are eligible to receive up to 12 months of aftercare services.

The depth and breadth of services provided will vary depending on the need. Providers should use the Self-Reliance & Empowerment Tool, in conjunction with youth input, to determine the length and extent of services needed.

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services and complete a new Self-Reliance & Empowerment assessment each quarter.

Youth are not required to receive aftercare and may decline services if they wish. However, each client discharged from services must have at least one aftercare record entered in the HMIS indicating whether services were provided.

Clients NOT Receiving Aftercare

- ✓ Select No for the 'Aftercare was provided' field (located under the Provision of Aftercare Services section of the Detroit YHDP Aftercare Assessment)
    - Complete for the Head of Household and all adults
- ✓ Save & Exit (End Workflow)

Clients Receiving Aftercare

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services. A new HMIS follow-up record should be completed at each home visit.

- ✓ Complete the following sections of the Detroit YHDP Aftercare Assessment for the Head of Household and all adults
    - Provision of Aftercare Services – Select Yes for the 'Aftercare was provided' field and document all the ways that aftercare was provided throughout the month.
    - Housing Stability –
        - Record a new Current Living Situation record if the client's living situation has changed.
        - Answer/Update the 'Has the client remained housed' field
        - Answer/Update the 'Is the client experiencing difficulty maintaining housing' question and record any applicable notes.
    - Self-Reliance & Empowerment Tool – Record new SR&E responses each quarter (at a minimum).
    - Client Status Updates – Update any information that has changed for the client with regard to contact information, pregnancy status, income & noncash benefits, employment and/or education.

Appendix V: YHDP Joint TH HMIS Data Entry Checklist

Below is a high-level overview of the HMIS workflow requirements for Joint TH projects.

Receive Referral

- ✓ EDA into the TH YHDP Bin (if not defaulted there)
- ✓ Run Referrals Report
- ✓ Access the Client Record
- ✓ Complete the Detroit Housing Match Assessment sections below (on the Client Summary Tab):
  - ✓ Detroit Agency Contacts
  - ✓ Case Notes (document attempts made to contact client)
- ✓ Update the Referral Outcome
  - <u>Cancelled/Declined Referrals</u> – End of the HMIS Workflow
  - <u>Accepted Referrals</u> – Proceed to Record Intake Information

Record Intake Information

- ✓ Review/Edit Household (if applicable)
- ✓ Add electronic ROI (Release of Information), including all HH members (if applicable)
- ✓ Record (HUD) Project Entry for all HH members (if applicable)
  - – Project Start Date = First day the client began to stay in the TH facility.
- ✓ Review/Update Detroit YHDP Housing Intake Assessment questions for all HH members (if applicable)
  - ✓ Add the initial SR&E Tool Record

    NOTE: *The Joint TH project will complete the SR&E tool with all "dual enrollment" clients, and the scores will be captured in the Joint TH bin <u>while clients are residing in the TH facility</u>.*
- ✓ Create a Case Plan and document Initial Case Notes
  - Goal Classification: Housing
  - Goal Type: Achieve Housing Stability
  - Status: In Progress
  - Record Case Note

    NOTE: *Case Plans/Notes only need to be completed in the Joint TH bin for "dual enrollment" clients who are <u>not</u> actively receiving RRH services.*
- ✓ Record Service Transactions *(OPTIONAL)*

Update & Maintain Client Record

- ✓ Add Update Interim Reviews
  - Complete Trafficking/Exploitation Screening (after relationship has been established)
  - Record quarterly SR&E tool scores
- ✓ Continue to update the client record to reflect changes (i.e., income, non-cash benefits, current living situation, and contact information, etc.)
- ✓ Document ongoing case notes (minimum one per month)
- ✓ Record additional services (optional)
- ✓ Complete Annual Assessments (as applicable)
  - Complete a new Annual Assessment for all household members (30 days +/- the anniversary of the head of household's Project Start Date)

Exit the Client from the Project

- ✓ Record Project Exit Date = Date client leaves the TH facility.
  - Document Reason for Leaving and Destination
  - Complete the Detroit YHDP Exit Assessment including
    - Project Completion Status (New discharge fields)
    - Safe and Appropriate Exit Information (New discharge fields)
    - Health Status (update responses given at entry)
    - Self-Reliance & Empowerment Tool (New record created at exit)
    - Update any data elements that changed since entry (or last interim review)

Record Aftercare Activity

IMPORTANT NOTE

Youth participating in Detroit's YHDP housing-related projects are eligible to receive up to 12 months of aftercare services.

The depth and breadth of services provided will vary depending on the need. Providers should use the Self-Reliance & Empowerment Tool, in conjunction with youth input, to determine the length and extent of services needed.

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services and complete a new Self-Reliance & Empowerment assessment each quarter.

Youth are not required to receive aftercare and may decline services if they wish. However, each client discharged from services must have at least one aftercare record entered in the HMIS indicating whether services were provided.

Clients NOT Receiving Aftercare

- ✓ Select No for the 'Aftercare was provided' field (located under the Provision of Aftercare Services section of the Detroit YHDP Aftercare Assessment)
    - Complete for the Head of Household and all adults
- ✓ Save & Exit (End Workflow)

Clients Receiving Aftercare

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services. A new HMIS follow-up record should be completed at each home visit.

- ✓ Complete the following sections of the Detroit YHDP Aftercare Assessment for the Head of Household and all adults
    - Provision of Aftercare Services – Select Yes for the 'Aftercare was provided' field and document all the ways that aftercare was provided throughout the month.
    - Housing Stability –
        - Record a new Current Living Situation record if the client's living situation has changed.
        - Answer/Update the 'Has the client remained housed' field
        - Answer/Update the 'Is the client experiencing difficulty maintaining housing' question and record any applicable notes.
    - Self-Reliance & Empowerment Tool – Record new SR&E responses each quarter (at a minimum).
    - Client Status Updates – Update any information that has changed for the client with regard to contact information, pregnancy status, income & noncash benefits, employment and/or education.