

HMIS PROCESS GUIDE FOR YHDP JOINT TH-RRH Projects

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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 <u>entire</u> 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 <u>must have a dual enrollment in Joint RRH</u> 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;
 - o 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 <u>Appendix</u> <u>III: Additional Resources.</u>

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 <u>MUST</u> complete the appropriate HMIS prerequisite training and closely follow the <u>detailed</u> steps outlined within this process guide. Failure to do so will result in data quality and reporting issues.

Experienced end-users may refer to <u>Appendix IV: YHDP Joint RRH HMIS Data Entry Checklist</u> and/or <u>Appendix</u> <u>V: YHDP Joint TH HMIS Data Entry Checklist</u> 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 <u>Appendix I:</u> <u>Running Referral Reports & Updating Referral Outcomes.</u>

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 #.

S Last Viewed	Clients > Client Search				
★ Favorites	Client Search				
🔒 Home		Beet	Middle	Please Search	the System before adding a New Client.
Clients	Name		-	LEON	COURS.
	Name Data Quality	-Select-	~		
Calls ,	Alias				
Resources	Social Security Number				
\$ Fund Manager	Social Security Number Data Quality	-Select-	*		
Shelters	U.S. Military Veteran?	-Select-	~		
Scans	Exact Match				
🗏 Reports	Search Clear Add	New Client With This Inform	ation Add And	nymous Client	
🐻 Admin 💦	Client Number				
E+ Logout	Enter or scan a Client ID number to go directly Client ID #	to that Client's profile. Submit			
Collapse ≪					

- 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.

WellSky. Community Services						
Region 10 Derrort HMIS Collaborati	W ()					
Enter Data As Provider Search		×			Type here for Global Search	
Provider Search Search for Providers by using keywords from the Pro	wider Name or Description.		11	Pollow Up List (3)		
Search YHSP	Show Advanced Opt	tons -		Client ID Type	Date	Te
Scarch Clear		b				
Provider Number						
Enter or scen a Provider ID number to search for that I Provider ID #	Provider. Submit					
Provider Search Results		_				
# A B C B E F G H I J H	LMNOPQRST	U V W X Y Z AII				
Provider C	Level Phone Location	Last Updated				
Agenzy B - MTAN Training Site - YHOP Crisis Mental realth Team (13575)	Level 4 006-523-5032 Chassel, MI	49916 05/16/2023	Mess All			
Agency II - MIAN Training Sile - THEP (88) (13432)	Level 5 906-523-5832 Chassel, MI	49916 05/16/2023				
G G Agoncy & MTAN Training Site YHOP TH (10401)	Lovel 4 906 523 5832 Chassell, MI	49916 05/16/2023				
Agency C - MIAN lineining Site - YEBP Project (13400)	Level 4 905-823-8802 Chaseed, MI	01016 00:02/2023				

COMPLETING THE DETROIT HOUSING MATCH ASSESSMENT

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

Client Information	/				Service Tr	ansactions	
Summary	Client Profile	Households	ROI	Entry / Exi	it	Case Managers	Case Plans

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.

OTHER INFORMATION
Q Case Notes
Start Date *
Add

Detroit Housing Match Assessment

Q DETROIT AGENCY CONTACTS

CONTACT NAME

Add 📥

CLIENT CURRENT LOCATION AND CONTACT INFORMATION

mdetroit@swsol.org

CAM IDENTIFIES THIS PERSON AS A HIGH-PRIORITY CLIENT? -Select- - G

IF YES, AND YOU ENCOUNTER THIS CLIENT, CONTACT CAM INTAKE IMMEDIATELY AT:

AGENCY NAME

AGENCY - CONTACT PHONE NUMBER

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 <u>Detroit RRH Policies and Procedures</u> 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.

	RRITFIONDEIS		
Currently in Rapi	d Re-housing program?	-Select- ✓ G	
RH PROVIDERS: Plea	ase update Client Status Me	onthly	
	ES/CLIENT STATUS		

- 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

	Client Ineligible for RRH (letter provid Client refused RRH	ed to client)					
	-Select-						
IF DENIED - REASON *	-Select-						
RRH CLIENT STATUS *	Client DENIED for RRH	✓ G					
AGENCY STAFF NAME *	G						
RRH AGENCY *	-Select-	✓ G					
End Date	/_/ 🛗 Ə 🖬 G						
Start Date *	08 / 03 / 2023 🛗 🖯 🖬 G						

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

Currently in Rapid	Re-housing program?	Yes 🗸		
RRH PROVIDERS: Pleas	se update Client Status	Monthly		
	S/CLIENT STATUS			
Start Date *	End Date	RRH AGENCY *	AGENCY STAFF NAME *	RRH CLIENT STATUS
Start Date *	End Date	RRH AGENCY *	AGENCY STAFF NAME *	RRH CLIENT S

ъ

- 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.

Service Transaction Dashboard		-		
Add Need	Add Service	Add Multiple Services	Add Referrals	View Previous Service Transaction
View Shelter Stays	View Entire Service History			

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

cintormation				service transactions				
eeds	Services Referrals		Referrals	Shelter Stays		Entire Service History		
Previous Referrals								
elect Dates	Start	Date	End Date					
Select-		//	_/	_/1 פֿ ווֹ		More		Search
Need Date	Referred Date	Referred To		Referral Outcome	Need Type		Need Status	Need Outcome
01/01/2023	08/03/2023	Agency C - MTAN Training Site - YHDP Project			Rapid Re-Housing Programs		Identified	
Add Referral				S	howing 1-1 of 1			

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

eferral Data	
Referred-To Provider	Agency C - MTAN Training Site - YHDP Project (13433)
Needs Referral Date *	01 / 01 / 2023 🛗 🖯 📅 2 🗸 : 00 🗸 : 00 🗸 AM 🗸
Referral Ranking	-Select- 🗸
VI-SPDAT Score	Please Select a VI-SPDAT Score Search Clear
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score Search Clear
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search Clear
Referral Outcome	Accepted V

4. Click Save & Exit.

UPDATING THE HOUSEHOLD (IF NECESSARY)

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

Client Information						Service Transactions						
Summary	Client Profile	Households	ROI	Entry / E	kit Cas	se Managers	Case Pla	ans Me	asurements	Asse	essment	
(35) Fem	nale Single Parent]			Head of	Relationship	to Head	Joined	Previous	Но	usehold	
Name				Age	Household	of Househol	d	Household	Association	s Cou	unt	
(115) Test, Da	ita				Yes	Self		06/01/2023	0 Q	1	Q	
(116) Test, Ch	hild				No	Daughter		06/01/2023	0 Q	1	Q	

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 <u>Appendix</u> <u>III: Additional Resources</u>.

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.

 (35) Female Single Pa (<u>115) Test, Data</u> (<u>116) Test, Child</u> 	a					
lease of Information D	ata					
Provider *	Agency C - MTAN Tr YHDP Project (1343	aining Site - 3)	Search	My	Provider	Clear
Release Granted *	Yes 🛩 b					
Start Date *	01 / 01 / 2023	1 C				
End Date *	01 / 01 / 2025	🛱 C 🛗	С			
Documentation	Signed Statement f	rom Client 🚪		~		
Witness				_		

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

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

The e-ROI start/end dates for "dual enrollment" clients <u>must</u> 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

elease of Information File Att	achments		×	End Date	2
File Attachments			13	06/01/2025	2
Date Added Na	ne Description	Type Provider	3	06/01/2025	I
Add New File Attachment	No matches.			04/04/00005	1

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

Clients enrolled in both project components (TH & RRH), must have a <u>separate</u> enrollment record, captured in the HMIS, for <u>each</u> 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

Client Information			1	Service	Service Transactions				
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Assessments	
		i Reminder	r: Household memb	pers must be established on I	Households tab before c	reating Entry / Exit	s		
Entry / Exit		-						Follow Client	
Add Entry	/ Exit			Туре	No matches.	art Date	Exit Date Inte	ups Count	
Add Endy					No matches.				

- 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 <u>electronic ROI</u> is in place, data collected by the project completing the initial intake will be carried over to the partnering project. <u>The partnering provider is still responsible for ensuring that the intake data is complete and accurate as of the project start date</u>.

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.

Entry Assessment	
Household Members	Detroit YHDP Housing Intake
(115) Test, Data Age: Unknown Veteran: Unknown	GENERAL DEMOGRAPHIC INFORMATION Answer for All Clients Including Children

- 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 <u>immediately prior</u> to entering the project. For more information on completing the Homeless History Interview and Determining the Approximate Date of Homelessness, refer to <u>Appendix III: Additional Resources</u>.
- 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.

CONTACT INFORMATION					
Q Contact Information					
Client's Cell Phone Number	Contact Name	Contact Type *	Contact Phone	Contact E-Mail	Contact Address
Add					

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

SELF-RELIANCE AN Answer for Head o	D EMPOWERM	ENT TOOL							
Q Self-Reliance	and Empower	ment Too	ł						
Start Date *	Housing Goal	Safety Goal	Tenancy Goal	Income Goal	Transportation Goal	Independent Living Skills Goal	Money Management Goal	Employment Goal	Education Goal
Add 🔶									

- NOTE: The Joint TH project will complete the SR&E tool with all "dual enrollment" clients <u>while</u> <u>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.

CURRENT LIVING SIT	UATION Household and Adults				
Q Current Living	Situation				
Start Date *	Information Date	Current Living Situation	Living situation verified by	Is client going to have to leave their current living situation within 14 days?	Location details
Add 🔶					

- 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.

Household Members	Detroit YHDP Housing Intake
(115) Test, Data Age: Unknown Veteran: Unknown	GENERAL DEMOGRAPHIC INFORMATION Answer for All Clients Including Children
(116) Test, Child Age: Unknown	Relationship to Head of * Self (head of household)

- 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.

Joint TH-RRH providers are required to document client case notes in the HMIS. As such, <u>at a minimum</u>, 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.

lient Information] 1			Service	e Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	2	Measurement
Goals								
Class	sification 3	Туре	Date Added	Date	e Set	Notes	Latest No	ote Date
Ad	d Goal				No matches.			

- 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.

i To include Hou	sehold members for this Goal, click the box beside each name. Only members from Household may be selected.
 (35) Female Single (115) Test, Data (116) Test, Chi 	e Parent a Ild
Provider *	Agency C - MTAN Training Site - Search My Provider Clear YHDP Project (13433)
Case Manager	-Select- 🛩
Date Goal was * Set	01 / 01 / 2023 苗 ♡ 苗
Classification *	Housing
Type *	Achieve housing stability
Goal Description	
Target Date	i c i i i i i i i i i i i i i i i i i i
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.

Goals				•
Classification	Туре	Date Added	Date Set	Notes Latest Note Date
Housing	Achieve housing stability	08/03/2023	01/01/2023	
Add Goal			Showing 1-1 of 1	

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

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

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

Client Information Service Transactions									
Service Transaction Dashboard									
Add Need	Add Service	Add Multiple Services	Add Referrals	View Previous Service Transactions					
View Shelter Stays	View Entire Service History								

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

NOTE: <u>Financial assistance services</u> should <u>only</u> be <u>entered for the head of household</u>. 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.

Number of Services *	1	
Start Date *	08 / 01 / 2023	
End Date		

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 <u>entire</u> <u>month</u> 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)

a	Number of Units	3	
b	Unit Type	Back	Rent 🗸
С	Cost per Unit	\$	900.00
	Total Cost of Units	ŝ	

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

- 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.

Distribute as voucher	○ <u>Yes</u> ® <u>No</u>
Vendor's Client Account Number	r
Name on Bill	
Vendor	Please Select a Vendor Search Clear
Code for Accounting Department	-Select- V
nding Sources	1
Source	
Source	

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

Funding Sources		
Source		Amount
Client Co-Pay		\$ 100.00
THDP		\$ 800.00 🌔
	Save - Submission - So Completed	
Add Funding Source	Add Other Contributing Sources	Calculate Total: \$900.00

- 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.

Need Status *	Service Completed ~	
Outcome of Need	Fully Met 🗸	
If Need is Not Met, Reason	-Select-	~

- 9. Click the Add Another button to add additional services, if applicable.
- 10. Click Save & Exit once all services are added

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 <u>financial service transactions</u> and <u>Updating</u> <u>RRH Outcomes/Client Status</u> 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.

Entry / Exit							
Program	Туре	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	t t
Agency C - MTAN Training Site - YHDP Project (13433)	HUD	/ 01/01/2023	1	B	8	Q	0
Add Entry / Exit		Showing 1-1 of 1					

- 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 <u>Update</u> 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.

(35) Female Single Parent	C Date: 01/01/2023 8:20 AM)
erim Review Data	
Entry / Exit Provider Entry / Exit Type	Agency C - MTAN Training Site - YHDP Project (13433) HUD
Interim Review Type *	Update - d

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 SCREENIN	IG		
Answer for Head of Household and Ad	ults		
It is not uncommon for young people to other options.	o stay in situations	that are risky or dangerous, simply because they	∕ have no
Have you ever worked, or done other things, in a place that made you feel scared or unsafe?	-Select-	✓ G	
Sometimes people are prevented from	leaving an unfair o	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-	✓ G	
Sometimes young people who are hom or fulfill basic needs like food/shelter.	eless or have diffic	culties with their families have very few options t	o survive
Ever received something in exchange for sex (e.g. money, food, drugs, shelter)	-Select-	✓ G	
Sometimes young people are told to lie	about what they d	do.	
Has anyone ever asked you to lie about what they make you do (like a boss, partner, or family member)?	-Select-	✓ G	

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.

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

SELF-R Answe	ELIANCE AND E er for Head of H	MPOWER	RMENT	TOOL dults						
Qs	Self-Reliance an	id Empow	vermen	t Tool						
	Start Date *	Housing Goal	Safety Goal	Tenancy Goal	Income Goal	Transportation Goal	Independent Living Skills Goal	Money Management Goal	Employment Goal	Educatior Goal
<u>~</u> 1	01/01/2023	Yes	Yes	No	No	No	Yes	Yes	No	No
A	Add					Sh	owing 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.

Anower for All Olionto Including Ohil	Iduan	
answer for All clients including chil	aren	а
Does the client have a disabling condition?	b Yes (HUD)	₩ G

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.

				Disabilities		0	
Q Disabilities			HUD Verification 🥑	Disability Type	Physical (HUD)	G	
Disability Type	Disability determination	Start Date *	End Date	Disability determination	No (HUD) V G	-	
Physical (HUD)	No (HUD)	01/01/2023		If Yes, Expected to be of			
HIV/AIDS (HUD)	No (HUD)	01/01/2023		indefinite duration and substantially impairs ability to live independently	-Select- v G		
Mental Health Disorder (HUD)	No (HUD)	01/01/2023		Above condition is going to be long term? (Retired)	-Select- 🗸 G		
Both Alcohol and Drug Use Disorder (HUD)	No (HUD)	01/01/2023		Note on Disability	G G		
🖍 📋 Drug Use Disorder (HUD)	No (HUD)	01/01/2023		Start Date *	01 / 01 / 2023 🛗 🖯 🖬 G		
Add		Showing 1-5 of 8	First Previous Next Last	End Date	01 / <u>31 / 2023</u> 🛗 🖯 🖬 G	1	
				Print Recordset	Save Save and Add Anoth	Cance	đ

- 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.

Q Disabilities			HUD Verifica
Disability Type	Disability determination	Start Date *	End Date
🌶 盲 Physical (HUD)	Yes (HUD)	02/01/2023	
🖍 📋 Physical (HUD)	No (HUD)	01/01/2023	01/31/2023

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 <u>Update Interim Review</u> to record the Housing Move-In Date (HMD) when a client first moves into a unit. The Interim Review Date <u>must</u> be the same as the Housing Move-In Date.

REMEMBER to update the <u>RRH Outcomes/Client Status</u> and Current Living Situation!!



- NOTE: There should be only <u>one HMD recorded per project enrollment</u>. 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 <u>associated YHDP RRH resources</u> 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.

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 <u>no more than 30 days before or after</u> the anniversary of the head of household's Project Start Date.

Clients with enrollments in both projects must have a <u>separate</u> Annual Review record for <u>each</u> 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.

Entry / Exit							
Program	Туре	Project Start Date	Exit Date	Interir	ns Follo Ups	w Client Count	t
Agency C - MTAN Training Site - YHDP Project (13433)	HUD	01/01/2023	1	8	8	00	Û
Add Entry / Exit		Showing 1-1 of 1			_		

- b. Click Add Interim Review.
- c. Check the box to include all relevant household members.
- d. Select <u>Annual Assessment</u> from the Interim Review Type dropdown list of options.
- e. Ensure the Review Date is set to the date that the change occurred.

(35) Female Single Parent	E C Date: 01/01/2023 8:20 AM)
(116) Test, Child (Entr	y.Date: 01/01/2023 8:20 AM)
Dealer Dealer	
terim Review Data	
Entry / Exit Provider	Agency C - MTAN Training Site - YHDP Project (13433)
Entry / Exit Provider Entry / Exit Type	Agency C - MTAN Training Site - YHDP Project (13433) HUD
Entry / Exit Provider Entry / Exit Type Interim Review Type *	Agency C - MTAN Training Site - YHDP Project (13433) HUD Annual Assessment V d

- 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 <u>Updating HUD</u> <u>Sub Assessment Data</u> 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.

Entry / Exit							
Program	Туре	Project Start Date	Exit Date	Interims ^F	ollow Cl Ups Co	lient ount	
agency C - MTAN Training Site - YHDP Project (13433)	HUD	1/01/2023	1	Ę	8	Q	0
Add Entry / Exit		Showing 1-1 of 1					

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

Image: Child Image: Child Edit Exit Data - (115) Test, Data Image: Complete the program Image: Completed program		(35) Female Single Parent	
Edit Exit Data - (115) Test, Data 3 Exit Date ★ 4 Reason for Leaving 1f "Other", Specify 5 Destination ★ If "Other", Specify	L	✓ (116) Test, Child	
3 Exit Date ★ 01 / 01 / 2025 Im D I 9 · : 30 · : 43 · AM · 4 Reason for Leaving Completed program · 1f "Other", Specify Exit Date ★ Rental by client, no ongoing housing subsidy (HUD) 1f "Other", Specify If "Other", Specify	Edi	t Exit Data - (115) Test, Data	
4 Reason for Leaving Completed program If "Other", Specify Ental by client, no ongoing housing subsidy (HUD) If "Other", Specify If "Other", Specify	3	Exit Date *	01 / 01 / 2025
If "Other", Specify Rental by client, no ongoing housing subsidy (HUD) If "Other", Specify If "Other", Specify			
5 Destination * Rental by client, no ongoing housing subsidy (HUD) If "Other", Specify	4	Reason for Leaving	Completed program 🗸
If "Other", Specify	4	Reason for Leaving If "Other", Specify	Completed program 🗸
	4	Reason for Leaving If "Other", Specify Destination *	Completed program Rental by client, no ongoing housing subsidy (HUD)

- 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 abovereferenced 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.



Youth participating in Detroit's YHDP housing-related projects are eligible to receive <u>up to</u> 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 <u>not required</u> to receive aftercare and may decline services if they wish. However, each client discharged from services <u>must have at least one aftercare record</u> 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

Entry / Exit						
Program	Туре	Project Start Date	Exit Date	Interims Follo Ups	w Client Count	
Agency C - MTAN Training Site - YHDP Project (13433)	HUD	▶ 01/01/2023	1/01/2025	B, B	Q	0
Add Entry / Exit		Showing 1-1 of 1				

- b. Click Add Follow Up Review.
- c. Check the box to include all relevant household members.
- d. Select <u>Aftercare (Post</u> <u>Exit)</u> 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 <u>NOT</u> receiving aftercare services).

 (115) Test, Data (Exit Data (116) Test, Child (Exit Data 	<u>te: 01/01/2025 9:30 AM)</u> ate: 01/01/2025 9:30 AM)
ollow Up Review Data	
Entry / Exit Provider	Agency C - MTAN Training Site - YHDP Project (13433)
Entry / Exit Type	HUD
Follow Up Review Type *	Aftercare (Post Exit) 🗸 👌
Review Date *	01 /01 /2024

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.
 - 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.

RUNNING THE REFERRAL REPORT

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

🛨 Favorites 🔹 🕨	Report Dashboard					
A Home	Audit Reports					
Clients						
Calls	Audit Report	User Information	User Login			
Resources						
\$ Fund Manager	Provider Reports					
Shelters	۹.	۹,	۹,	۹.	۵.	
Scans	Call Record Report	Client Served Report	FY2023 CoC APR	FY2023 Coordinated Entry APR	Daily Unit Report	
Reports ,						
Admin 🕨	۰.	٠.	٠.		۲.	
→ Logout	FY2023 Data Quality Framework	FY2023 ESG CAPER	Fund Availability Report	Fund Usage Report	My Managed Funds Report	
Collanse	۹.	٠.				
	Needs Report	PATH	Referrals	Service Transaction		

- 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)

3 Provider *	Agency C - MTAN Training Site - Search My Provider Clear YHDP Project (13433)	
	O This provider AND its subordinates This provider ONLY	
Referral Type *	Incoming referrals to provider 🗸	
5 Referral Status	Outstanding Oclosed OALL	
Referral Outcome	-All- 🗸	
Referral Date Range	01 / 01 / 2023 🛱 Ə 🖬 01 / 01 / 2023 🛱 Ə 🛱	
8 Sort Order	Please Select a Sort Order Select Clear	
Export Report		O Build Report Clear

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 <u>Updating the Referral Outcome (within the Client Record)</u> 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

Report Results								
Referral Date	Name	Group ID	Ranking VI- SPD	TAY-VI- AT SPDAT	VI- FSPDAT	Need Type	Referred By	Referred To
01/01/2023 2:00:00 AM	(31) Training, PSH HoH	ł				Supportive Housing Placement/Referral	Agency A - MTAN Training Site - CAM - Access	Agency C - MTAN Training Site - YHDP Project
Select ALL	clear U	pdate Referr	al Outcome () Th	e selected (1) Refe Accepted	erral will receiv	e the outcome selected below.	1 of 1	
					4	Save Referral Information	Exit	

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

Client Information Service Transactions						
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans
Case Managers						
Name Provider			Phone Number	Start Date		
Add Case Manager					No matches.	

- 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).

Case Manager - (115) T	Case Manager - (115) Test, Data					
Household Members						
To include Househol	d members for this Case Manager, cli from the SAME Household m	ck the box besid ay be selected.	le each name. On	y members		
(35) Female Single Pa	rent					
3 (<u>115) Test, Data</u> (<u>(116) Test, Child</u>						
4 Type*	O <u>Community Services User</u> O <u>N</u>	1e Other				
Name *		_				
Title						
Phone Number						
Email Address						
5 Provider *	Agency C - MTAN Training Site - YHDP Project (13433)	Search	My Provider	Clear		
6 Start Date *	01 / 01 / 2023 🛗 🖯 🛱					
7 End Date	// ඕ ව ট					
		Add Cas	e Manager	Cancel		

APPENDIX III: ADDITIONAL RESOURCES

Resource Type	Description	URL
Job Aid: Creating and Managing	Step-by-step instructions:	
Households	- Adding new members to an existing household/entry	
	- Removing members when they leave a household	
Homeless History Interview Guide	Detailed guidance for completing the Homeless History Interview section of the HMIS Intake Assessment.	https://handetroit.box.com/s/6kl3oz5qxz8
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.	vyquxzv5n4h4gok5knuz6
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.	<u>https://handetroit.box.com/s/glogsxibwju</u> <u>33u4tkzdhkduopf2clyeq</u>
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.	<u>https://handetroit.box.com/s/gk4p6gs4tnp</u> <u>37r9ifyd1ja0bj4rc2g2a</u>

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</u> <u>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 <u>up to</u> 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 <u>not required</u> to receive aftercare and may decline services if they wish. However, each client discharged from services <u>must have at least one aftercare record</u> 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 <u>up to</u> 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 <u>not required</u> to receive aftercare and may decline services if they wish. However, each client discharged from services <u>must have at least one aftercare record</u> 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.