HOMELESS ACTION NETWORK OF DETROIT

HMIS PROCESS GUIDE

FOR

STREET OUTREACH PROVIDERS

Rev. 2021/01/25

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IMPORTANT PREREQUISTE NOTICE

This workflow requires that users have a FIRM understanding of the ClientPoint Module as well as the basic ServicePoint functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above <u>MUST</u> complete the appropriate prerequisite training before continuing.

INTRODUCTION

This workflow outlines the data entry requirements for Street Outreach projects. If the project also receives funding from another source (i.e. PATH), please refer to the appropriate grant specific workflow document(s) for additional data entry requirements.

To record a contact in HMIS requires that a client record be established. It is understood that street outreach workers may not be able to obtain all the information necessary to complete the entire client record at the point of first contact. As such, staff may record a project entry with limited information about the client and improve on the accuracy and completeness of client data over time by editing data in the HMIS record.

<u>A client's HMIS record should be created as soon as the client's full name and date of birth are known</u>. This will allow Street Outreach providers to adequately search for the client in HMIS prior to creating a new (and potentially duplicate) client record. If the client's full name and DOB are collected <u>after</u> the initial meeting, providers should backdate the HMIS project entry to reflect the date of initial contact.

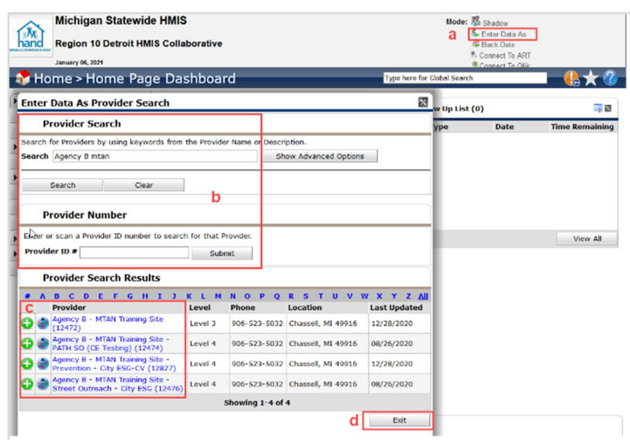
GETTING STARTED

The process begins with the following steps:

1. EDA (Enter Data As) into your Street Outreach page, if not already defaulted to that provider bin.

   To EDA into your Street Outreach page

   a. Click on the Enter Data As link located in to top right corner of the screen
   b. Search for your Street Outreach Provider Page
   c. Click the green plus (+) sign to select that provider
   d. Click Exit



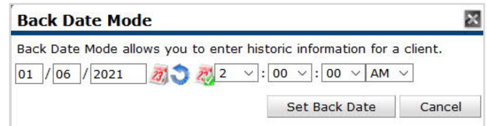
2. Select backdate mode, if not entering data in real time.

   To enter backdate mode,

   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 data was captured, if not today's date.

   c. Click Set Back Date

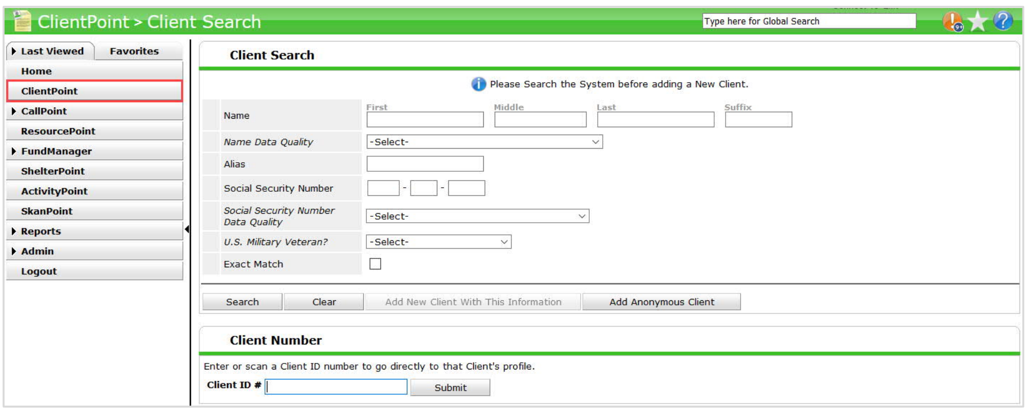


LOCATE OR ADD CLIENT IN CLIENTPOINT

1. Locate and existing client or add a new client in ClientPoint

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

   b. Search for the client by entering the client's details or by 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.

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

   c. *If the client is located in the search results*, click the Green Plus sign from the results list.

   d. *If the client is not located through the search*, complete the Name Data Quality, Alias (if applicable), Full SSN (if available at this time), SSN Data Quality and U.S. Military Veteran (if an adult) fields. Then click Add New Client with this Information and click OK.

CREATE OR EDIT HOUSEHOLD (IF APPLICABLE)

1. Click on the Household tab to create a new household or to edit household information.

   NOTE: If the client is part of a household, all family members must the listed under the Household tab as data entry is required on all members of the family. Households are NOT created for single individuals.

Manage Visibility of Client Record

IMPORTANT NOTES

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.). If verbal and/or written consent to share data is not obtained from the client at the point of initial contact, an electronic ROI must be entered in HMIS as soon as consent is obtained.

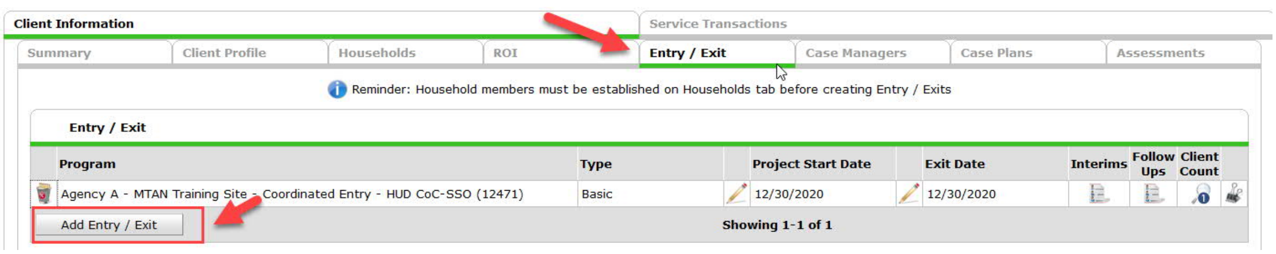
NOTE: ROIs entered after the fact must be backdated to the date of initial contact

1. Click ROI Tab
2. Add a Release of Information (e-ROI) to activate both internal & external visibility (sharing). Make sure to include all household members (if applicable).
    a. Release Granted – 'YES'
    b. 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 to request assistance with adjusting the client record to allow for internal sharing only.

Creating the Street Outreach Project Entry

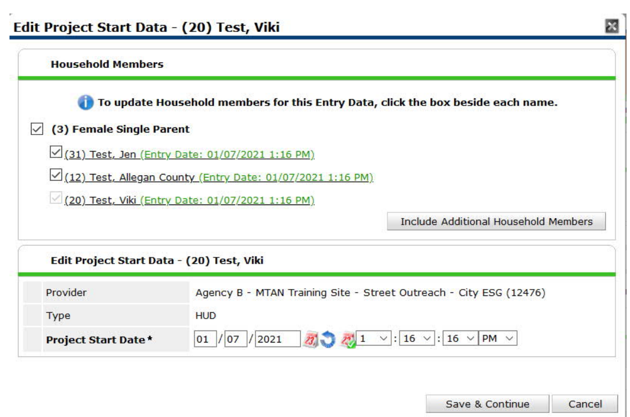
1. Navigate to the Entry/Exit



2. Click the Add Entry/Exit button to add the new Street Outreach Project Entry.
    a. If household members are present, click the box(s) to select them.
    b. Ensure the correct Provider is listed.

    If the correct Provider is not listed, return to Step 1 under the Getting Started section of this document to EDA (Enter Data As) into your Street Outreach Page before continuing with this step.

    c. Select HUD as the entry Type
    d. Ensure the Entry (Project Start) Date equals the Date of First Contact



    e. Click Save & Continue.
    The screen will refresh, and the MSHMIS Street and Shelter Intake Assessment will display (if this does not occur, you are either in the wrong provider page or your provider page is set up incorrectly).

Completing the MSHMIS Street and Shelter Intake Assessment

1. Complete and/or update as much of the MSHMIS Street and Shelter Intake Assessment universal data elements for each household member as you are able based on the information available (i.e. Demographics, Health and Disability, Homeless History, Client Location)

2. Navigate to the Current Living Situation section and click the Add button to record the Client's Current Living Situation information.

    a. Enter the Information Date, which is the date of contact.

    b. Select the appropriate Current Living Situation from the dropdown list of options.

    c. Use the Living situation verified by Lookup table to select your Street Outreach provider.

    d. Document the specifics regarding the client's location using Location details text field (i.e. corner of 1st and 2nd street).

3. Skip the Date of Engagement if the client has not been fully engaged. See Important Note below:

IMPORTANT NOTE

Street outreach projects are expected to record every contact made with each client in HMIS.

- *A Contact is defined as an interaction between a worker and a client designed to engage the client. Contacts may include activities such as a conversation between the worker and client about the client's well-being and needs, an office visit to discuss the client's housing plan, or a referral to another community service. Contacts are documented via the Current Living Situation subassessment.*
- *An Engagement Date is the date when an interactive client relationship results in a deliberate client assessment or beginning of a client-centered plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. This date may be on or after the project start date and must be prior to the project exit.* Data quality reporting is not relevant until the client becomes 'Engaged' in services, once this occurs, ALL required data elements should be completed.

If the client exits without becoming engaged, the engagement date should be left blank. If the client was contacted on the date of engagement, a contact must also be entered for that date.

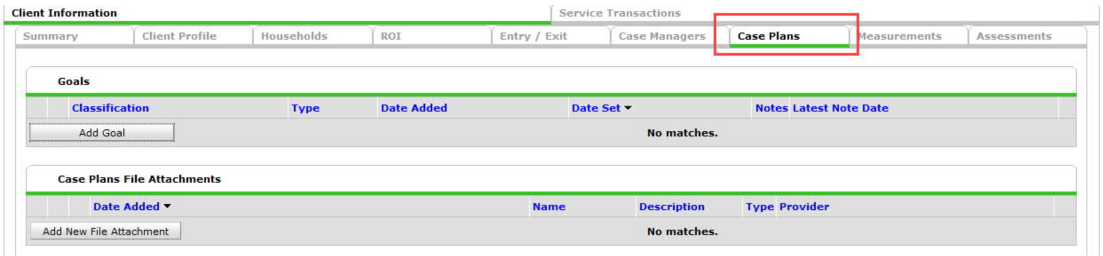
4. Click Save & Exit to exit the Assessment (for single individual)

    Or, Click Save and scroll up to select the next household member to complete the appropriate fields in the assessment for that individual. Continue the process for all household members. Once the assessment has been completed on the remaining household members, click Save and return to the Head of Household (HOH) record.

Documenting Client Case Plans & Case Notes

1. Navigate to the Case Managers tab to add a Case Manager, if applicable

2. Navigate to the Case Plans Tab to add client Goals and Case Plans documents to add or update client goals and case plans files.



a. Click the Add Goal button to add the Street Outreach goal

   i. Select the Case Manager, if applicable.

   ii. Ensure the Date Goal was Set is correct.

   iii. Select <u>ESG</u> from the Classification drop-down list of options.

   iv. Select <u>Discharge to Permanent Housing (initial ES & SO goal)</u> from the Type dropdown list of options.

   v. Select <u>In Progress</u> from the Overall Status dropdown list of options.

   vi. Click the Add Goal button to save the goal.

   vii. Scroll down to the Case Notes section to Add Case Note.

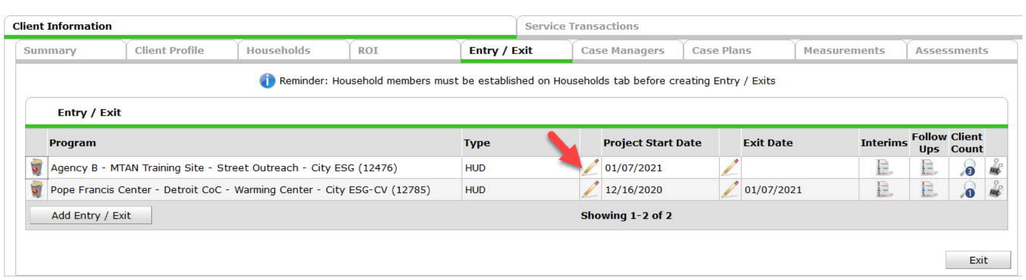
   viii. Click Save & Exit.

UPDATING HMIS RECORD WHILE CLIENT RECEIVES SERVICES

1. EDA into your Street Outreach page, if not already defaulted to that provider bin.
2. Select backdate mode, if not entering data in real time.
3. Search for the client.
4. Update the client assessment data and/or document additional client contacts using the Current Living Situation sub assessment and add applicable case notes, as follows:

Completing the Remaining Intake Assessment (with information collected over time, but true at project start)

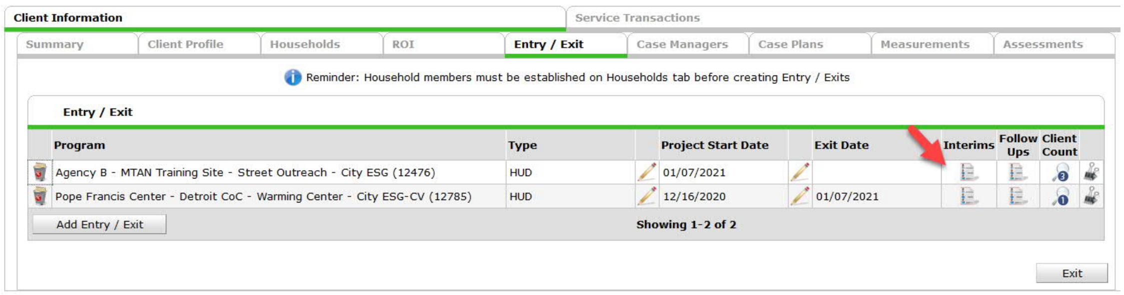
1. Navigate to the Entry/Exit tab to edit the open Street Outreach project entry.
2. Click on the pencil next to the Entry Date to edit the program entry.



3. Click Save & Continue in the popup window.
4. Navigate to the appropriate fields of the MSHMIS Street and Shelter Intake Assessment and complete using information that was true at project entry.
5. Click Save & Exit to close the assessment.

Recording Ongoing Contacts and/or Documenting Changes to Assessment Data After Project Start

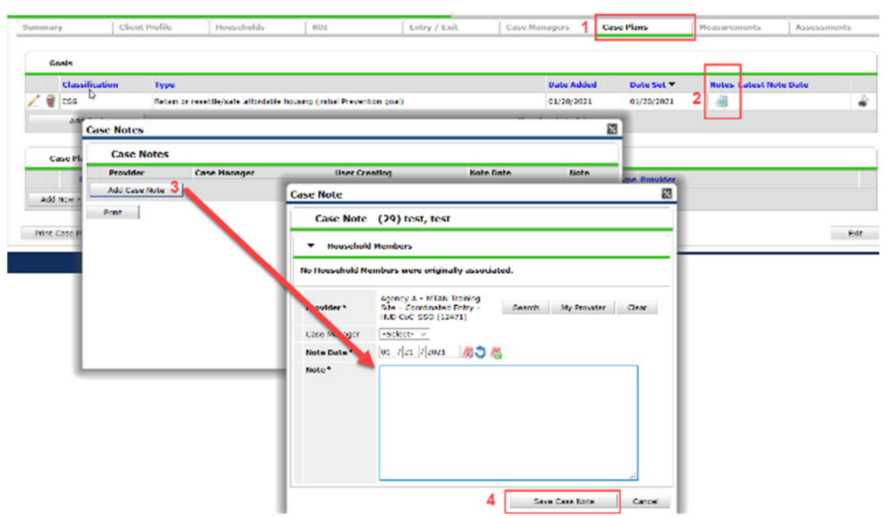
1. Navigate to the Entry/Exit tab.
2. Click on the icon in the Interims column to add an Interim review.



3. Select Update from the Interim Review Type dropdown list of options.
4. Click Save & Continue in the popup window.
5. Update assessment responses information that has changed since the project entry (if applicable)
6. Navigate to the Current Living Situation section to record the Contact and the client's current living situation.
7. Record a Date of Engagement (ONLY IF APPLICABLE)
8. Click Save & Exit to close the assessment.

Adding Additional Case Notes

1. Navigate to the Case Plans tab
2. Click on the Case Note Icon which is attached to the ESG Street Outreach Goal
3. Click the Add Case Note button and add the case note



4. Click the Save Case Note button

Documenting Service Transactions (Optional)

Street Outreach providers are not required to track Services, however those providers that wish to do so can add and update services through the Service Transactions Tab. For more information on Service Transactions, refer to the training and associated documentation found at www.hmislearningcenter.org.

EXITING THE CLIENT

IMPORTANT NOTE

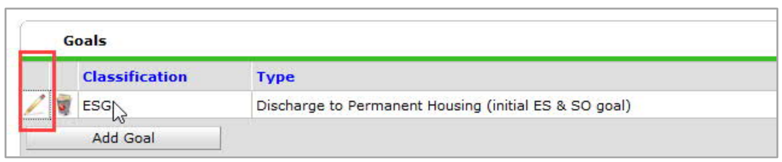
An exit is created once the client is housed, no longer needs housing, declines further services, or becomes 'inactive'.

Staff should monitor un-exited clients. <u>Clients who have not had contact with outreach staff in 90 days should be closed out with an exit date that reflects that last date of contact</u>.

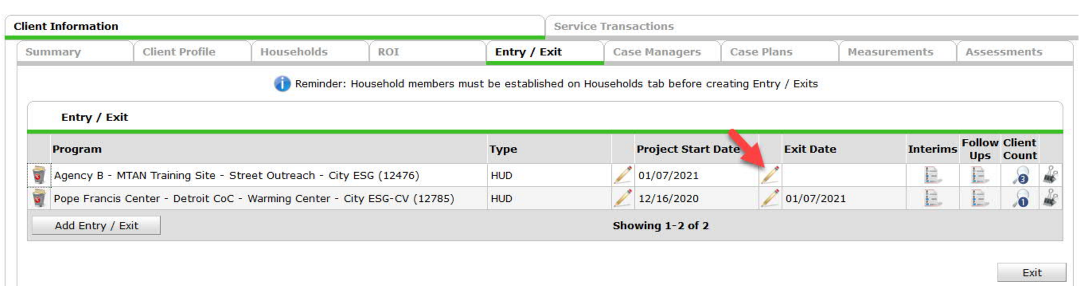
Staff should make at least three documented attempts to contact clients who are scheduled for case closure due to inactivity prior to closing the case in HMIS. Contacts should be made using a combination of methods (i.e., calling emergency contacts, visiting last known location, etc.)

To Exit a Client:

1. EDA into your Street Outreach page, if not already defaulted to that provider bin.
2. Select backdate mode, if applicable
3. Search for the client.
4. Navigate to the Case Plans tab to update the overall status of the ESG Discharge to Permanent Housing (initial ES & SO goal)
    a. Click the Pencil Icon to open the goal.



    b. Navigate to the Overall Status and select one of the following options from the dropdown menu
        – Service Completed (if client is housed) -OR-
        – Closed (if client is exited due to inactivity)
    c. Click Save & Exit
5. Navigate to the Entry/Exit tab to Exit the client



6. Click the Pencil Icon next to the Exit Date in the Entry/Exit screen.
7. Select all household members, if applicable
8. Add the Exit Date, which will be the date the client is no longer receiving outreach services. *(Note: Clients exited from HMIS due to inactivity should have an Exit Date that reflects the date of last contact.)*
9. Select the applicable Reason for Leaving from the dropdown list of options.
10. Select the appropriate Destination from the drop-down list of options.

11. Add Notes, if applicable.
12. Click Save & Continue which will bring you to the MSHMIS Exit Assessment.
13. Update any data that the client has provided at Exit that has changed from Entry or from the last Interim Review within the Assessment, if applicable.
14. Scroll down to Current Living Situation section to record new Current Living Situation Record
    a. Enter the Information Date, which is the date of contact.
    b. Select the appropriate Current Living Situation from the dropdown list of options. (*Note: For Clients that exited due to inactivity, select 'Worker Unable to Determine')*
    c. Use the Living situation verified by Lookup table to select your Street Outreach provider.
    d. Document the specifics regarding the client's location using Location details text field (i.e. corner of 1st and 2nd street).
15. Click Save & Exit when finished.

APPENDIX A: STREET OUTREACH HMIS DATA ENTRY CHECKLIST

This document provides a snapshot of the steps involved with managing clients through the HMIS. For more detailed guidance refer to the Job Aid – HMIS Process for Street Outreach.

- Create HMIS Record (at point of initial contact or once the client's full name and DOB is known)
  - ✓ EDA into your Street Outreach bin
  - ✓ Backdate, if necessary
  - ✓ Search/Add client
  - ✓ Create/Edit Household (if applicable)
  - ✓ Add Electronic ROI (Release of Information)
    - If the client has not granted permission to share data at the point of initial contact, an electronic ROI MUST be added <u>AS SOON AS</u> verbal/written permission has been obtained. The ROI must be backdated to the date of initial contact in order data to share properly.
  - ✓ Record (HUD) Project Entry = Same day as initial contact
  - ✓ Record all known data elements at project entry (on MSHMIS Street & Shelter Intake Assessment) including the Current Living Situation
  - ✓ Create Case Plan/Standard Street Outreach Goal and Document Case Notes
    - Goal Classification: ESG
    - Goal Type: Discharge to Permanent Housing (initial ES & SO goal)
    - Status: In Progress
    - Record Case Note
  - ✓ Record applicable Service Transactions (OPTIONAL)

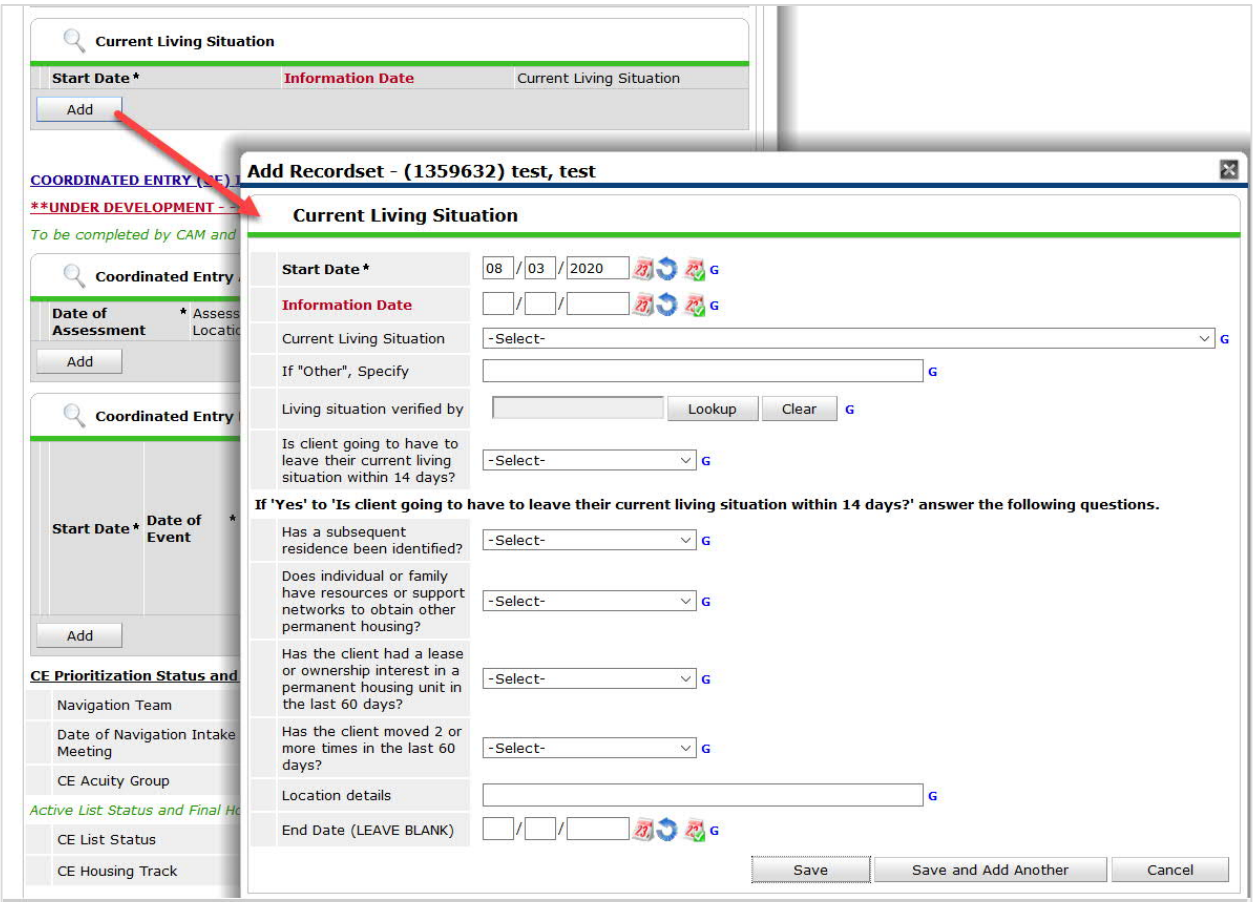
- Update HMIS Record as a Relationship Develops and Information is Obtained
  - ✓ Continue to complete the MSHMIS Street & Shelter Intake Assessment as information becomes available (update this information on the project entry as it would have been true at project start).
  - ✓ Record new Current Living Situation records at each contact (must be done via an Interim Review)
  - ✓ Document ongoing case notes (on the Street Outreach Goal, located under the Case Plans tab)
  - ✓ Record Current Living Situation and Date of Engagement – if and when the client becomes Engaged. (must be done via an Interim Review) NOTE: *All data elements MUST be completed for clients that become Engaged*
  - ✓ Record additional services provided (OPTIONAL)

- Exit Client from Project
  - ✓ Update Overall Status of the Street Outreach Goal
    - Service Complete -OR- Closed (if client is exited due to inactivity)
  - ✓ Record Project Exit Date = Date client is no longer receiving outreach services
    - Staff should monitor un-exited clients. <u>Clients who have not had contact with outreach staff in 90 days should be closed out with an exit date that reflects that last date of contact.</u>
    - Staff should make at least three documented attempts to contact clients who are scheduled for case closure due to inactivity prior to closing the case in HMIS. Contacts should be made using a combination of methods (i.e., calling emergency contacts, visiting last known location, etc.)
  - ✓ Document Reason for Leaving and Destination
  - ✓ Update any data elements that changed since entry or last interim review (if applicable)
    - Record new Current Living Situation Record

APPENDIX B: CURRENT LIVING SITUATION REFERENCE GUIDE (FOR STREET OUTREACH)

Element #4.12 – Current Living Situation

Rationale: To record each contact with people experiencing homelessness by street outreach and other service projects and to provide the number of contacts required to engage the client, as well as to document the client's current living situation.

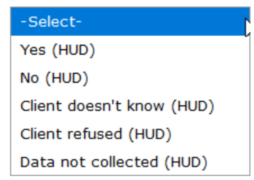
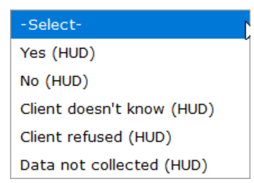


The Current Living Situation should reflect where the client is staying now (at the moment the information was verified). In many cases, this may align with the client's Prior Living Situation response when it is collected at project start.

Prior Living Situation is captured once at project entry, while current living situation is recorded and updated over time. The Current Living Situation data element is used to record each contact with people experiencing homelessness by street outreach, CE and other service providers.

The Current Living Situation data element will be one factor used in reporting to determine whether a street outreach client is still <u>actively</u> receiving services or should be closed out of HMIS.

Current Living Situation Sub Assessment Fields

Start Date*	Auto-Populated *(Should reflect date information collected)*
Information Date	Date Information Collected
Current Living Situation	Dropdown list aligns with Prior Living Situation Dropdown list
If “Other”, Specify	Text field
Living situation verified by	Lookup table includes all providers currently in the HMIS *(If applicable, use this field to capture which HMIS provider is currently housing the client).*
Is client going to have to leave their current living situation within 14 days? *Note: If the client's Current Living Situation response is temporary, institutional, or permanent, record additional housing status information to support the determination of imminent and at-risk of homelessness housing statuses based on HUD's definition of homelessness*	Yes/No dropdown list *(Not completed if current living situation is on streets, shelter, or Safe Haven)* 
If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.	
Has a subsequent residence been identified?	Individual Yes/No dropdown lists *(Conditional based on yes response to above)* 
Does individual or family have resources or support networks to obtain other permanent housing?	
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	
Has the client moved 2 or more times in the last 60 days?	
Location details *Required for clients living in “Place Not Meant for Habitation” (i.e. a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) per Detroit’s CE Data Collection Protocols*	Text field used to record specific detail on location of clients who are living in a place not meant for habitation.