Institute for Community Alliances

HMIS USER GUIDE FOR DHS OEO HYA PROJECTS

Emergency Shelter (ES) | Transitional Housing (TH) | Permanent Supportive Housing (PSH) | Permanent Housing with Services (PH S) | Rapid Re-Housing (RRH) | Services Only (SSO)

Contents

DATA ENTRY QUICK REFERENCE

This section provides simplified instructions for common data entry tasks. Please refer to the General HMIS Instructions and upcoming sections of this document for further instruction. You can also refer to the Using multiple assessments in one provider article found on MN's HMIS Knowledge Base.

Create a New Client Record

1. Enter **EDA mode** as the correct provider and open the client's record in **Clients**.
2. Make sure that the client is not already in HMIS by searching for different combinations of their information.
3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**. Clients that have consented to statewide data sharing should have the word **SHARED** typed in the **Alias** field.
4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen.)
5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile Assessment**.
    a. If a client has agreed to statewide data sharing, enter a **Date of ROI Consent**.
6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or create a new household.

ENTER A CLIENT INTO A PROJECT

1. Enter **EDA mode** as the correct provider and open the client's record in **Clients**.
    a. If entering data for a household, be sure to search for the head of household.
2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**.
    a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
3. Click on the **Entry/Exit** tab and select **Add Entry/Exit**.
    a. If entering a household, check the box next to each client included in the entry.
    b. Select **Basic** from the **Type** drop-down menu.
    c. If necessary, adjust the **Project Start Date**, then select **Save & Continue**.
4. For each client included in the entry, complete the data elements on the **MN Core: Entry** assessment in the **Entry/Exit Data** pop-up.
    a. If entering data for multiple household members, save time by clicking on **Add Household Data** and completing the **Household Data Sharing Assessment**.
5. After you have saved the data elements on the **MN Core: Entry** assessment that appears by default, you will need to manually select your funder specific **Entry** assessment, the **OEO HYA Entry** assessment. After you've selected the **OEO HYA Entry** assessment, you may proceed with completing any additional data elements for each client included in the **Entry/Exit**. Then click **Save & Exit**.

UPDATE A CLIENT'S INFORMATION

A Baseline Outcome review should be completed for each client participating in HYA YSH projects (TH, PSH, PH S, RRH, SSO) within 14 days of Project Start Date. An Outcomes Interim Review is required for each client participating in HYA YSH projects (TH, PSH, PH S, RRH, SSO) as well as for each ES stay that is longer than 30 consecutive days in HYA ES projects for every six-month reporting period. Create an Interim Review prior to each report due date.

In addition, data elements should be updated when a change occurs.

1. Enter **EDA mode** as the correct provider and open the client's record in **Clients**.
2. Click on the **Entry/Exit** tab, then select the **Interims** icon for the correct Entry/Exit.
3. In the **Interim Reviews** pop-up, click on **Add Interim Review**.
    a. Select the appropriate **Interim Review Type** (**Baseline** or **6 Month Review** for HYA Outcomes, **Update** for updates prompted by a change, such as income amount) from the drop-down menu.
    b. If serving a household, be sure to include all applicable household members in the entry by checking the boxes next to their names.
4. In the **Entry/Exit Interim Review** pop-up, review the **MN Core: Update** assessment answers. Update any answers that are no longer correct with the newest accurate information.
5. After you have saved the data elements on the **MN Core: Update** assessment that appears by default, you will need to manually select your funder specific **Update** assessment, the **OEO HYA Update** assessment. After you've selected the **OEO HYA Update** assessment, you may proceed with completing and/or updating any additional data elements for each client included in the **Entry/Exit**. Then click **Save & Exit**.

EXIT A CLIENT FROM A PROJECT

1. Enter **EDA mode** as the correct provider and open the client's record in **Clients**.
2. Click on the **Entry/Exit** tab, then select the **Edit Pencil** (in the **Exit Date** column) next to the correct entry.
    a. If exiting a household, be sure to include **all** applicable household members in the exit by checking the boxes next to their names.
    b. Enter the correct **Exit Date** and **Destination**, then click on **Save & Continue.**
3. Complete the **MN Core: Exit** assessment for each household member.
4. After you've saved the data elements on the **MN Core: Exit** assessment, you will need to manually select the **OEO HYA Exit** assessment from the same **Entry/Exit Date** pop-up.
5. After you've selected the **OEO HYA Exit** assessment, you may proceed with completing any additional data elements for each client included in the **Entry/Exit** record. Then click **Save & Exit**.

RUN A REPORT

Rely on funder communication for report periods, due dates, or changes to requirements. For more information about DHS OEO HYA Reports, refer to the user guide section titled Reporting Guidelines.

1. Click **Connect to BusinessObjects** in the top right corner of your screen (below back date).
2. In BusinessObjects, you will find the reports needed for **DHS OEO HYA** located in the following folders:
    - *Public Folders / minnesota_live_folder / SSA Report Gallery (Funder Reports) (Secure) / 0. Program Evaluation:* **MIN-01-SAG-030 - MN Core Homeless Programs**
    - *Public Folders / minnesota_live_folder / SSA Report Gallery (Funder Reports) (Secure) / 4. State Homeless Programs / DHS OEO:* **SHP-32-SAG-046 - HYA Outcomes**

NOTE: When running a report, Helpdesk can see the report you SCHEDULE, but we cannot see the reports you VIEW.

DATA COLLECTION FORMS

Data collection forms for OEO HYA projects can be found by visiting the Forms and Instructions page on the Minnesota HMIS website. These forms will change as new data standards are released biannually on October 1. There are both PDF and Word versions available for download.

You are not required to use ICA's data collection forms. Staff responsible for data collection should also be aware that their agency may require them to gather non-HMIS data that is not captured by these forms.

PROGRAM-SPECIFIC DATA ELEMENTS

Program-specific data elements are chosen by your funder and are often unique to the types of projects they fund. More information about these data elements can be found in the HYA Reporting Guide, available at request from the MN Department of Human Services.

4.02 – 4.10 COMMON DATA ELEMENTS

OEO HYA-funded projects must collect the following "common" program specific data elements. More information about these data elements can be found in the HMIS Data Standards Manual.

Common Program Specific Data Elements		Data Collected About		
		All Clients	Head of Household Only	Head of Household and Other Adults
4.02	Income and Sources			X
4.03	Non-Cash Benefits			X
4.04	Health Insurance			X

Common Program Specific Data Elements		Data Collected About: All Clients	Data Collected About: Head of Household Only	Data Collected About: Head of Household and Other Adults
4.05	Physical Disability			X
4.06	Developmental Disability			X
4.07	Chronic Health Condition			X
4.08	HIV/AIDS			X
4.09	Mental Health Problem			X
4.10	Substance Abuse			X

WAS THE HOUSEHOLD ASKED TO LEAVE THE PROGRAM?

Project Type Applicability: HYA YSH projects (TH, PSH, PH S, RRH, SSO)

Data Collected About: Head of Household **Data Collection Point:** Project Exit

Data Collection Instructions: Record whether the household was asked to leave, if yes provide the reason.

Field		Dependency	Response Category/Data Type	
A	Was the household asked to leave the program?	None	1	Yes
			2	No
			3	Client doesn't know
			4	Client refused
			5	Data not collected
B	If yes, what was the reason the household was asked to leave the program?	Field A; Response 1		Non-payment of rent
				Reached maximum time allowed
				Criminal activity / violence
				Non-compliance with program
				Unknown/Disappeared/No Longer Engaging with Program
				Other

OUTCOMES MEASURED

Project Type Applicability: HYA YSH projects (TH, PSH, PH S, RRH, SSO) as well as for each client who has stayed longer than 30 consecutive days in HYA ES projects (however, agencies are encouraged to complete the Outcomes assessment on **all** clients).

Data Collected About: Head of Household **Data Collection Point:** Update (Interim Review)

Data Collection Instructions: Outcomes can be updated throughout the individual's participation in the program. A response of "yes" or "no" is required for every single outcome area listed in the Outcomes

Measured section. “Yes” indicates the client accomplished the outcome. “No” means they are either not focused on that outcome or are making progress, but the outcome has not yet been achieved. See Adding Outcomes section for detailed instructions on entering Outcomes in HMIS.

CASE PLANNING

Field		Dependency	Response Category/Data Type	
A	Was youth assisted in completing a case plan?	None		Yes
				No

VITAL DOCUMENTS PORTFOLIO

Field		Dependency	Response Category/Data Type	
A	Does youth have their Birth Certificate?	None		Yes
				No
B	Does youth have their Social Security Card?	None		Yes
				No
C	Does youth have a State ID or Tribal ID Card?	None		Yes
				No

EMPLOYMENT

Field		Dependency	Response Category/Data Type	
A	Was youth employed at any point in reporting period?	None	1	Yes
			2	No
C	Was youth provided employment-related support services?	None		Yes
				No

EDUCATION

Field		Dependency	Response Category/Data Type	
A	Does youth have GED or High School Diploma?	None	1	Yes
			2	No
C	Is youth attending High School or GED classes?	None		Yes
				No
D	Is youth attending post-secondary education classes?	None		Yes
				No
E	Was youth provided education-related services during reporting period?	None		Yes
				No

CONNECTIONS

Field		Dependency	Response Category/Data Type	
A	Was youth provided support in connecting and building relationships with family during the reporting period?	None		Yes
				No
B	Was youth provided support in connecting and building a stable relationship with a positive, supporting adult (other than family or agency staff)?	None		Yes
				No

FOSTER CARE BENEFITS

Field		Dependency	Response Category/Data Type	
A	Is the youth eligible for extended foster care benefits?	None	1	Yes
			2	No
B	If **Yes**, is the youth accessing or in the process of accessing extended foster care benefits?	Field A; Response 1	1	Yes
			2	No

MEDICAL

Field		Dependency	Response Category/Data Type	
A	Does the youth have identified healthcare (including mental health) providers and/or is connected to a clinic?	None		Yes
				No

CONNECTIONS TO SAFE HARBOR

Field		Dependency	Response Category/Data Type	
A	Has the youth exchanged sex acts for money, a place to stay, clothing, food, drugs, transportation, or other things to meet their needs?	None	1	Yes
			2	No
B	If **Yes**, has the youth been offered or referred to Safe Harbor services?	Field A; Response 1	1	Yes
			2	No

ADDING OUTCOMES

The "MN: OEO HYA Outcomes" ("Outcomes") assessment was developed to capture services provided by the agency, as well as outcomes achieved by youth. Outcomes should be completed for each client participating in HYA YSH projects (TH, PH S, RRH) as well as for each client who has stayed longer than 30 consecutive days in HYA ES projects (however, agencies are encouraged to complete the Outcomes assessment on **all** clients). Outcomes can be updated from the Entry / Exit tab under the Interims heading.

Jump to instructions for HYA Youth Supportive Housing (YSH) projects

Jump to instructions for HYA Emergency Shelter (ES) projects

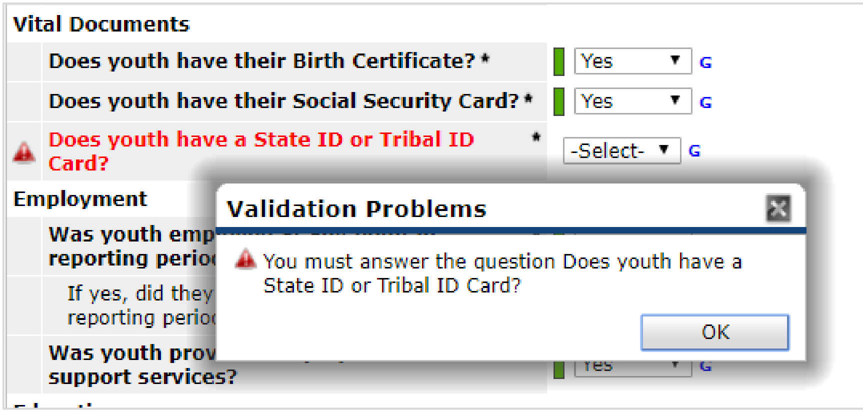
HOW TO: HYA YSH OUTCOMES

As described above, the HYA Outcomes Measures were developed to capture outcomes achieved by youth. In order to report on HYA Outcomes progress for *every* client, regardless of how long a client has been enrolled in your housing program, HYA Youth YSH projects will complete a series of Interim Reviews. The first Interim Review will capture a baseline outcomes measurement, which is a requirement for all newly enrolled clients starting July 1, 2019. After the first review is completed, additional Interim Reviews will be created for each six-month reporting period that the client is in your program to record progress on these outcome measurements.

BASELINE OUTCOMES

When a client enters your housing program, you will need to create a **Baseline Review** within 14 days of the client's Project Start Date.

1. From the **Entry / Exit** tab, under the **Interims** heading, click on the HYA entry you're wanting to create an Interim Review for.
2. Select **Baseline** for **Interim Review Type**.
3. **Review Date** should fall within 14 days of the client's Project Start Date.
4. When the **Entry / Exit Interim Review** window pops up, the **MN: OEO HYA Baseline Outcomes** assessment is displayed by default and you may proceed with answering the questions.
5. There are four outcome areas on the **Baseline Outcomes** assessment: Vital Documents, Employment, Education, and Medical. A response of "yes" or "no" is required for every question.
   - "Yes" indicates the client accomplished the outcome.
   - "No" means the outcome has not yet been achieved.
6. Click **Save & Exit** after you've answered all questions.
7. ***Please Note:*** If you try to **Save & Exit** without answering all the required questions in the Baseline Outcomes Assessment, a pop-up window will appear, prompting you to complete the remaining questions:



OUTCOMES

If a client is in your program at *any point during* the six-month reporting period, you must create a **6 Month Review** and answer/update all MN: OEO HYA Outcomes assessment questions. There is an exception for clients who enter within the last two weeks of a reporting period (on June 17/December 18 through the end of that month). These clients are not required to have a **6 Month Review** completed for that reporting period; they would only need a **Baseline Review** completed.

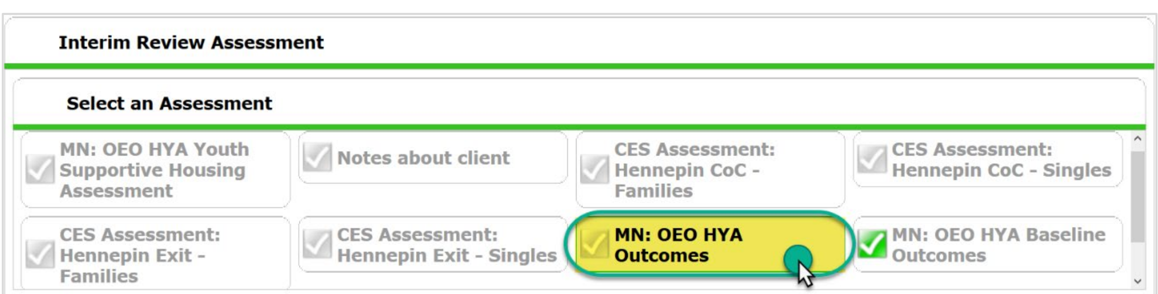
Please note, the *Review Type* will always be **6 Month Review**, even if a client has not been enrolled in your project for six months. **6 Month Review** does not refer to a length of time, it is just the *Review Type* used to report HYA Outcomes!

WHEN TO CREATE AN INTERIM REVIEW FOR YOUR **HYA YSH PROJECT**

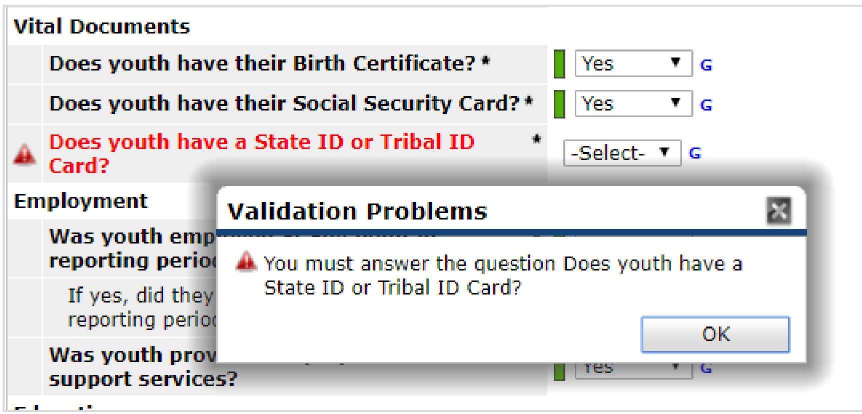
1. Create *only one* **6 Month Review** for each six-month reporting period. A new **6 Month Review** should be created for each six-month reporting period. Below are the date ranges for the six-month reporting periods:

   1st six-month report period: July 1 - December 31

   2nd six-month report period: January 1 - June 30
2. From the **Entry / Exit** tab, under the **Interims** heading, click on the HYA entry you're wanting to create an Interim Review for.
3. Select **6 Month Review** for **Interim Review Type**.
4. **Review Date** should fall within the 6-month reporting period you're reporting on.
5. When the **Entry / Exit Interim Review** window pops up, you will need to manually select the **MN: OEO HYA Outcomes** assessment:



6. After you've selected the **MN: OEO HYA Outcomes** assessment, you may proceed with answering the questions.
7. A response of "yes" or "no" is required for every outcome area listed in the Outcomes Measured section.
    a. "Yes" indicates the client accomplished the outcome.
    b. "No" means they are either not focused on that outcome or are making progress, but the outcome has not yet been achieved.
8. Click **Save & Exit** after you've answered all questions.
9. ***Please Note:*** If you try to **Save & Exit** without answering all the required questions in the Outcomes Assessment, a pop-up window will appear, prompting you to complete the remaining questions:



    a. For some "yes/no" statements, there are "If yes…" clauses that require additional information. The system *will not* prompt you to answer these questions if they are left blank, so make sure to record an answer if necessary.

UPDATING OUTCOMES DURING A REPORTING PERIOD

1. Best practice is to update outcomes as a client meets a goal, so you are prepared for reporting.
2. If you created an Outcomes Interim Review earlier in the reporting period and update it later in the reporting period, you can simply edit that same **6 Month Review** and ***change the date of the review*** so that it reflects the most recent updates within the reporting period.

OUTCOMES AT EXIT

1. At client's exit, create a **6 Month Review** that falls within the reporting period at exit.
2. Or, if you've already created a **6 Month Review** for that reporting period, you can update that last **6 Month Review** and ***change the date of the review*** so that the answers to the Outcomes assessment are current as of exit date.

SCENARIO

A client enters your housing program with a Project Start Date of 7/2/2019 and exits on 8/21/2020.

Correct Outcomes assessment data entry would include four **Interim Reviews** completed with the following **Interim Review Dates** as possibilities:

- 7/5/2019;
- 12/15/2019;
- 5/20/2020;
- and 8/20/2019

Note that there is one **Baseline** review and each review after that is a **6 Month Review**. There is one **6 Month Review** completed within each six-month reporting period:

Interim Reviews Associated with this Entry / Exit

		Review Date	Review Type	Client Count
		08/20/2020	6 Month Review	
		05/20/2020	6 Month Review	
		12/15/2019	6 Month Review	
		07/05/2019	Baseline	

HOW TO: HYA ES OUTCOMES

If a client has a shelter stay that is longer than **30 consecutive days** during the six-month reporting period, you must create a **6 Month Review** and answer/update all MN: OEO HYA Outcomes assessment questions.

Please note, the *Review Type* will always be **6 Month Review**, even if a client has not stayed in your shelter for six months. **6 Month Review** does not refer to a length of time, it is just the *Review Type* used to report HYA Outcomes!

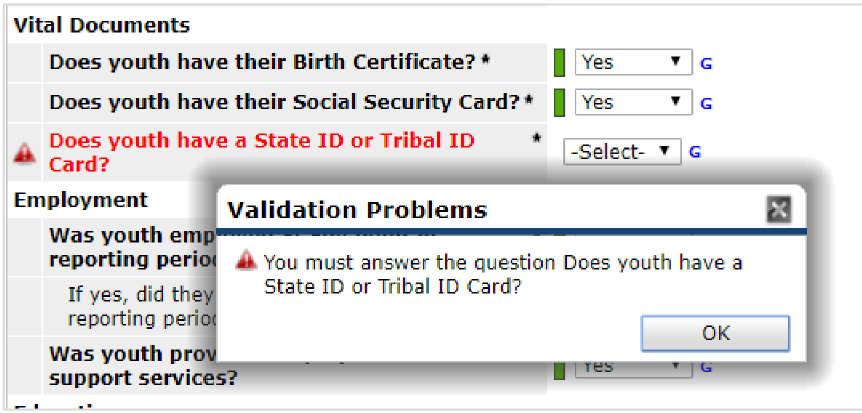
WHEN TO CREATE AN INTERIM REVIEW FOR YOUR **HYA ES PROJECT**

1. Create a **6 Month Review** for each shelter stay that is longer than 30 consecutive days that falls within the six-month reporting period. If the 30+ day shelter stay occurs over a reporting period end/start date, a **6 Month Review** will need to be created in **each** reporting period. Below are the date ranges for the six-month reporting periods:

   1st six-month report period: July 1 - December 31

   2nd six-month report period: January 1 - June 30
2. From the **Entry / Exit** tab, under the **Interims** heading, click on the HYA entry you're wanting to create an Interim Review for.
3. Select **6 Month Review** for **Interim Review Type**.
4. **Review Date** should fall within the 6-month reporting period you're reporting on.
5. A response of "yes" or "no" is required for every outcome area listed in the Outcomes Measured section.
   - "Yes" indicates the client accomplished the outcome.
   - "No" means they are either not focused on that outcome or are making progress, but the outcome has not yet been achieved.
6. Click **Save & Exit** after you've answered all questions.

7. ***Please Note:*** If you try to **Save & Exit** without answering all the required questions in the Outcomes Assessment, a pop-up window will appear, prompting you to complete the remaining questions:



   a. For some "yes/no" statements, there are "If yes…" clauses that require additional information. The system will not prompt you to answer these questions if they are left blank, so make sure to record an answer if necessary.

UPDATING OUTCOMES DURING A REPORTING PERIOD

1. Best practice is to update outcomes as a client meets a goal, so you are prepared for reporting.
2. If you created an Outcomes Interim Review earlier in the reporting period and update it later in the reporting period, you can simply edit that same **6 Month Review** and ***change the date of the review*** so that it reflects the most recent updates within the reporting period.

OUTCOMES AT EXIT

1. At client's exit, create a **6 Month Review** that falls within the reporting period at exit.
2. Or, if you've already created a **6 Month Review** for that reporting period, you can update that last **6 Month Review** and ***change the date of the review*** so that the answers to the Outcomes assessment are current as of exit date.

SCENARIO

A client enters your shelter program with a project start date of 6/15/2019 and exits on 7/21/2019.

Correct Outcomes Assessment data entry would include two **Interim Reviews** completed with the following **Interim Review Dates** as possibilities:

- 6/30/2019;
- and 7/15/2019

Note that the review that has been completed is a **6 Month Review** and there is one review completed within the six-month reporting period:

Interim Reviews Associated with this Entry / Exit

		Review Date	Review Type	Client Count
		07/15/2019	6 Month Review	
		06/30/2019	6 Month Review	

REPORTING GUIDELINES

This section introduces the data quality and funder-required reports for DHS OEO HYA projects. For information about reporting periods, due dates, and changes to requirements, refer to communications from funders.

FUNDER-REQUIRED REPORTS

Data Quality Instructions: Agencies should participate in the Quarterly Data Quality process to ensure that accurate information is being recorded and to address any data errors. Before sending the following reports to your funder, review and correct any errors that appear within the reports.

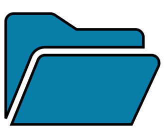
Required Reports:

1. MN Core Homeless Programs
2. HYA Outcomes

REPORT INSTRUCTIONS

1. MIN-01-SAG-030 – MN Core Homeless Programs

Location in BusinessObjects:



Public Folders

minnesota_live_folder

SSA Report Gallery (Funder Reports) (Secure)

0. Program Evaluation

Required Prompts (prompts not listed below should be left blank):

- Select Provider(s): *Choose the provider(s) you want to include in your report*
- Select Reporting Group(s): *Can be left blank if not using a Reporting Group*
- Select Program Type Code: *Ensure your provider's program type code is included in the selection*
- EDA Provider: *Leave blank except in rare cases (for example if ICA told you to use it)*
- Enter Start Date: *The first day of the reporting period*
- Limit to Veterans ONLY?: *Select No*
- Enter Effective Date (PLUS 1 Day): *The last day of the report period +1 day*
- Enter End Date (PLUS 1 Day): *The last day of the report period +1 day*
- Include Income?: *Select Yes*

2. SHP-32-SAG-046 - HYA Outcomes

Location in BusinessObjects:

Public Folders

minnesota_live_folder

SSA Report Gallery (Funder Reports) (Secure)

4. State Homeless Programs

DHS OEO

Required Prompts (prompts not listed below should be left blank)**:**

- Select Reporting Group(s): *Can be left blank if not using a Reporting Group*
- Select Provider(s): *Choose the provider(s) you want to include in your report*
- EDA Provider: *Leave blank except in rare cases (for example if ICA told you to use it)*
- Enter Start Date: *The first day of the reporting period*
- Enter End Date (PLUS 1 Day): *The last day of the report period +1 day*