Institute for Community Alliances

HMIS USER GUIDE:

MN DEPARTMENT OF HUMAN SERVICES (DHS) HOUSING SUPPORT PROJECTS

Permanent Housing with Services (PH S)| Permanent Supportive Housing (PSH)| Permanent Housing- Housing Only (PH HO)| Transitional Housing (TH)| Supportive Services Only (SSO)

Contents

Date of Last Revision: 5/18/2018

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.

Create a New Client Record

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. Make sure that the client is not already in HMIS by searching for different combinations of their information.
    a. If you are provisionally accepting a referral from your CoC's Coordinated Entry System for a housing opening, select your project provider (the project that has an opening the client may be filling at your agency) when entering EDA mode.
3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**.
    a. If the client has consented to participate in statewide data sharing, enter the word **SHARED** in the **Alias** field.
    b. If receiving a Coordinated Entry referral, you can go directly to the client's record using the client ID given to you by your CoC's Priority List Manager.
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).
    a. If receiving a Coordinated Entry referral, you do not need to Back Date at this point. Please refer to the steps given in the "CES in HMIS Written Instructions" document for your CoC's workflow.
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. Attach a **Professional Statement of Need** in the File Attachments section in the **Client Profile tab**.
7. 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 **ClientPoint**.
   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**. (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**. Select **Basic** from the **Type** drop-down menu.
   a. If entering a household, check the box next to each client included in the entry.
4. For each client included in the entry, complete the data elements on the **MN: DHS HS Supportive Housing All Inclusive Entry** 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. Click on the **Measurements Tab**. Select "Add New Measurement". Complete all domains on an **Initial Self-Sufficiency Outcomes Matrix (SSOM)**.
   a. The Self-Sufficiency Matrix is required for all adults (18+) in the household. If there are any additional adults in the household, go to their record and complete their Self-Sufficiency Matrix.

Update a Client's Information

UPDATES ARE REQUIRED EVERY 6 MONTHS AFTER ENTRY. IN ADDITION, DATA ELEMENTS SHOULD BE UPDATED WHEN A CHANGE/MOVE OCCURS.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
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. For updates required every 6 months after entry, select **6 Month Review** for "Interim Review Type." For updates prompted by a client move, select **Update**.
   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. Update the following data elements when a change has taken place on the **MN: DHS HS Supportive Housing Update Assessment** in the Entry/Exit Interim Review pop-up;
   a. <u>Head of Household</u>: Client's Residence, Housing Cost and Housing Subsidy Information
   b. <u>Head of Household and Adults 18+</u>: Monthly Income, Non-Cash Benefits and Health Insurance
   c. <u>All Household Members</u>: Disabilities
5. Click on the **Measurements Tab**. Select **Interim** as "New Point of Measurement". Complete all domains on an **Interim Self-Sufficiency Outcomes Matrix (SSOM)**.
   a. The Self-Sufficiency Matrix is required for all adults (18+) in the household every 6 months. If there are any additional adults in the household, go to their record and complete their Self-Sufficiency Matrix.

EXIT A CLIENT FROM A PROJECT	1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**. 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 **Exit DHS HS Supportive Housing** Assessment for each household member. 4. Click on the **Measurements Tab**. Select **Final** as the "New Point of Measurement". Complete all domains on a **Final Self-Sufficiency Outcomes Matrix (SSOM)**. a. The Self-Sufficiency Matrix is required for all adults (18+) in the household. If there are any additional adults in the household, go to their record and complete their Self-Sufficiency Matrix.
RUN A REPORT	FOR MORE INFORMATION ABOUT DHS HOUSING SUPPORT REPORTS, REFER TO THE USER GUIDE SECTION TITLED REPORTING GUIDELINES. 1. Click on **Reports** to open the **Report Dashboard**. Select **ART**. 2. Run data quality reports on a regular basis (at least quarterly) for DHS-HS, using the Core Funder Requirements Report, located in *Public Folder → SSA Report Gallery → Core Report-ALPHA* *When running a report, Helpdesk can see the reports you **SCHEDULE** but cannot see the reports you **VIEW**.*

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR DHS HOUSING SUPPORT PROJECTS CAN BE FOUND BY FOLLOWING THE LINKS PROVIDED BELOW OR VISITING THE FORMS AND INSTRUCTIONS PAGE ON THE MINNESOTA HMIS WEBSITE. THESE FORMS WILL CHANGE AS NEW DATA STANDARDS ARE RELEASED ANNUALLY ON JULY 1 (MINNESOTA) AND OCTOBER 1 (HUD).

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.

FAMILIES

DHS HS HOUSEHOLD ENTRY- Housing and Supportive Services

DHS HS HOUSEHOLD UPDATE- Housing and Supportive Services

DHS HS HOUSEHOLD EXIT- Housing and Supportive Services

INDIVIDUALS

DHS HS SINGLE ENTRY- Housing and Supportive Services

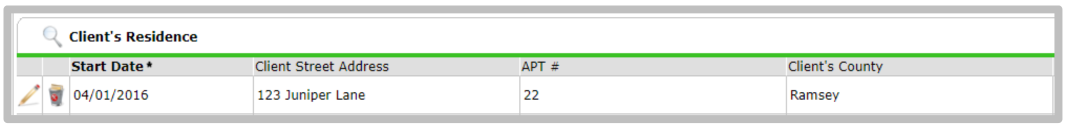
DHS HS SINGLE UPDATE- Housing and Supportive Services

DHS HS SINGLE EXIT- Housing and Supportive Services

PROGRAM-SPECIFIC DATA ELEMENTS

PROGRAM-SPECIFIC DATA ELEMENTS ARE CHOSEN BY YOUR FUNDER AND ARE OFTEN UNIQUE TO THE TYPES OF PROJECTS THEY FUND.

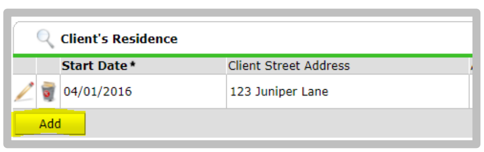
CLIENT'S RESIDENCE



Data Collected About: Head of Household (including Singles and Youth)
Data Collection Point: Project Start, Update as client moves (by completing an Interim Update or Interim 6-month review) and Project Exit
Rationale: To track a client's residence while enrolled in a specific project
Data Collection Instructions: The client's residence records should cover the entire time a client is enrolled in the project, with no gaps or overlaps. City and County MUST be collected. Collect information on ALL moves, especially if the current residence status type changes while the client is in your project.

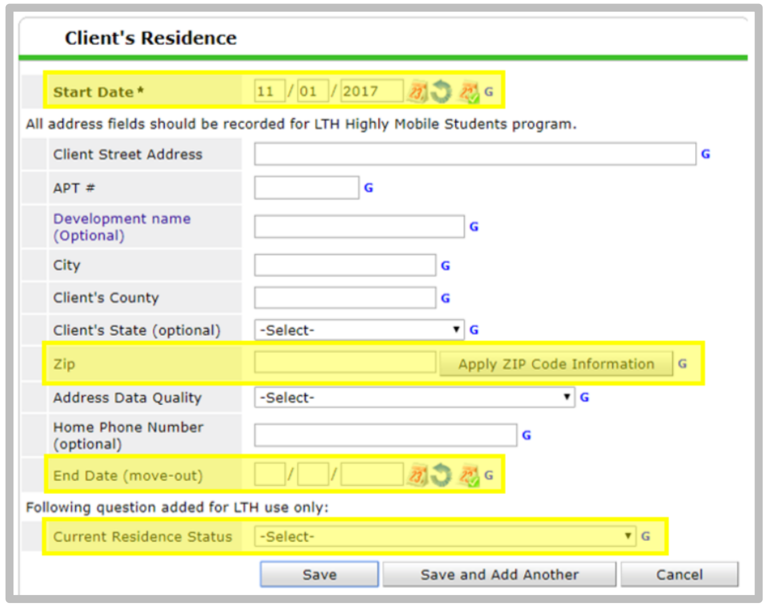
DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode the correct provider, in the Head of Household's record, and on the correct assessment (Entry, Update, or Exit).
2. Click **Add** in the bottom left-hand corner of the **Client's Residence sub-assessment**.



3. In the pop-up, answer the applicable data elements. Note **required** elements are highlighted yellow. You are encouraged to fill in as many of the fields as you are able, however.

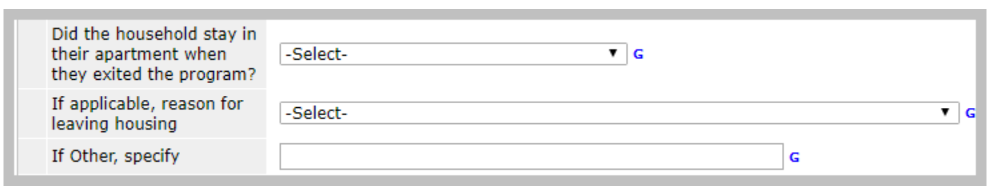
a. **Start Date:** Enter the date they moved into the residence while enrolled in your project
b. **Client Street Address**
c. **APT #**
d. **Development Name**
e. **Client's County**
f. **Client's State**
g. **Zip:** This will automatically populate City, County, and State!
h. **Address Data Quality**
i. **Home Phone Number**
j. **End Date (move-out):** Only add an end date if moved out of residence
k. **Current Residence Status**



4. Click on Save.

CLIENT'S RESIDENCE AT EXIT

Complete the additional Client's Residence questions for Heads of Households (including singles and youth):



RESPONSE CODES

Client's Residence:

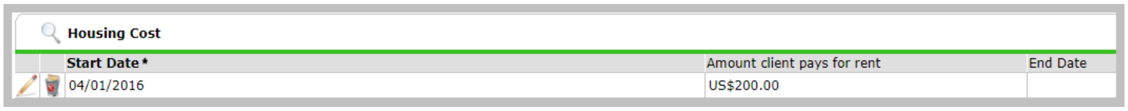
Field	Dependency	Response Category/Data Type
Start Date	No	Date field
Client Street Address	No	Text field
APT#	No	Text field
Development name (Optional)	No	Text field
City	No	Text field (or auto-filled based on zip)
Client's County	No	Text field (or auto-filled based on zip)
Client's State (optional)	No	Text field (or auto-filled based on zip)
Zip	No	Text field
Address Data Quality	No	Full Address Reported
		Incomplete or estimated address reported
		Client doesn't know
		Client refused
		Data not collected
Home Phone Number (optional)	No	Text field
End Date (move-out)	No	Date field
Current Residence Status	No	Site based supportive housing
		Scattered site supportive housing

		Transitional housing for homeless
		Emergency shelter
		Hotel/motel without emergency shelter
		Living with family
		Living with friends
		Foster care/group home
		Hospital
		Psychiatric facility
		Substance abuse treatment center, including detox
		Place not meant for habitation
		Jail, prison, or juvenile facility
		Other
		Don't know
		Refused

Client's Residence at Exit:

Field	Dependency	Response Category/Data Type
A Did the household stay in their apartment when they exited the program?	No	1 Left Current residence at exit
		2 Left residence before exit
		3 Will remain in current residence at exit
B If applicable, reason for leaving housing	Field A, Response 1 or 2	1 Successful completion of residential program
		2 Subsidy ended
		3 Leaving damaged or substandard housing (including fire)
		4 No longer meets eligibility requirements for residence
		5 Non-compliance with residential program rules
		6 Unit does not meet needs (incl. accessibility or size)
		7 On-site services do not meet needs
		8 Location or neighborhood does not meet needs
		9 Conflict with other roommates or neighbors
		10 Cannot afford rent
		11 Leaving project-based voucher for tenant-based voucher
		12 Discharged or reached time limit
		13 Hospitalized or moved to residential treatment program
		14 Incarcerated
		15 Legal eviction/UD for criminal/drug activity
		16 Legal eviction/UD for lease violation, other than criminal or drug
		17 Legal eviction/UD for non-payment of rent
		18 Notice to vacate or non-renewal for criminal/drug activity
		19 Notice to vacate or non-renewal for lease violations, other than criminal or drug
		20 Left service area or residential program
		21 Death
		22 Unknown/Disappeared
		23 Other (Specify)
C If Other, specify	Field B, Response 23	1 Text field

HOUSING COST



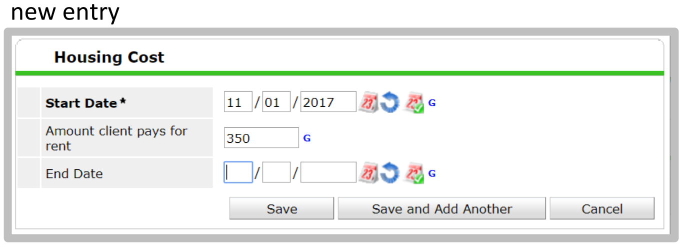
Data Collected About: Head of Household (including Singles and Youth)
Data Collection Point: Project Start, Update as client moves (by completing an Interim Update or Interim 6-month review) and Project Exit

Rationale: To track changes to the amount that a client pays for rent
Data Collection Instructions: Housing Cost records should cover the entire time a client is in housing with no gaps and no overlaps. Collect information on the full amount that the client is responsible for, even if it is $0.00. Required only while in site-based or scattered supportive housing.

DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode the correct provider, in the Head of Household's record, and on the correct assessment (Entry, Update, or Exit).
2. Confirm the client is in site based or scattered site supportive housing.
3. Click Add in the bottom left-hand corner of the Housing Cost box.

4. In the pop-up, answer the applicable data elements.
   a. **Start Date:** Enter the date they moved into the residence while enrolled in your project, or the date the amount the client is paying for rent changes
   b. **Amount Client Pays for Rent:** Enter to the nearest dollar (If the client does not contribute to their rent, enter "0")
   c. **End Date:** Add if the previous amount client pays for rent has ended and you are about to add a new entry



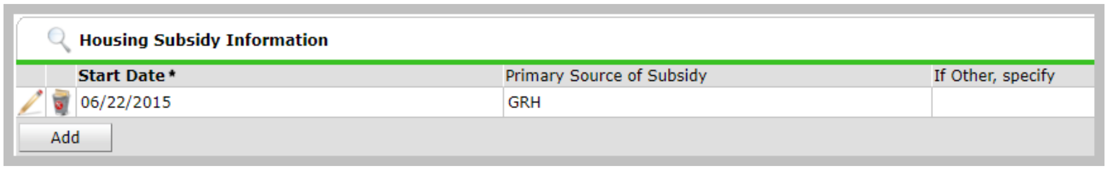
5. Click on Save.

RESPONSE CODES

Housing Cost:

Field	Dependency	Response Category/Data Type
A Start Date	No	1 Date Field
B Amount Client Pays for Rent	No	1 Text Field
D End Date	No	1 Date Field

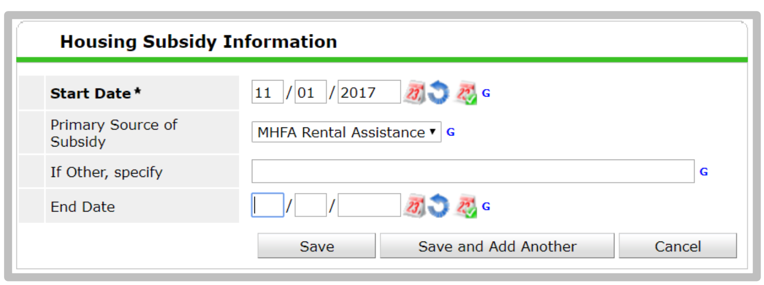
HOUSING SUBSIDY INFORMATION



Data Collected About: Head of Household (including Singles and Youth)
Data Collection Point: Project Start, Update as client moves (by completing an Interim Update or Interim 6-month review) and Project Exit
Rationale: To track the client's Primary Source of Housing Subsidy
Data Collection Instructions: Housing Subsidy Records should cover the entire time a client is in housing, with no gaps and no overlaps.

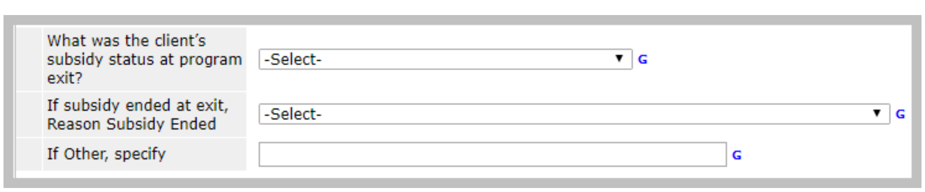
DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode the correct provider, in the Head of Household's record, and on the correct assessment (Entry, Update, or Exit).
2. Confirm the client is in site based or scattered site supportive housing.
3. Click Add in the bottom left-hand corner of the Housing Subsidy Information sub-assessment.
4. In the pop-up, answer the applicable data elements.
    a. **Start Date:** enter the start date of the subsidy. This should be the current residence start date.
    b. **Primary Source of Subsidy:** Select from the dropdown list. Select "No Subsidy" if a subsidy is not being utilized.
    c. **End Date:** Add if the previous housing subsidy has ended and you are about to add a new entry.
5. Click on Save.



HOUSING SUBSIDY INFORMATION AT EXIT

Complete the following Housing Subsidy Information questions for Heads of Household (including singles and youth) in Site Based or Scattered Site Supportive Housing:



RESPONSE CODES

Housing Subsidy Information:

Field	Dependency	Response Category/Data Type
A Start Date	No	1 Date Field
B Primary Source of Subsidy	No	1 No Subsidy
		2 Bridges
		3 County Funded
		4 GRH
		5 HOME
		6 HOPWA
		7 MHFA Rental Assistance
		8 Property Subsidy
		9 SHP Leasing
		10 Section 8
		11 Shelter Plus Care
		12 Sons of Bridges
		13 Other (specify)
C If Other, specify	Field B, Response 13	1 Text Field
D End Date	No	1 Date Field

Housing Subsidy Information at Exit:

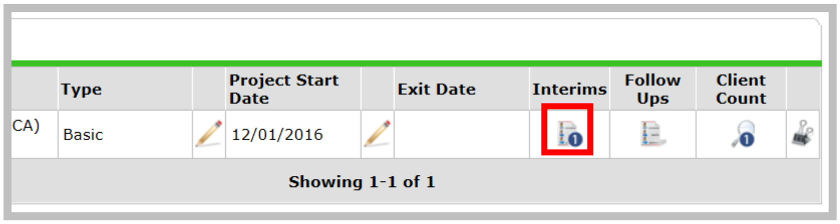
Field	Dependency	Response Category/Data Type
A What was the subsidy status at program exit?	No	1 Subsidy ended at exit (answer next questions)
		2 Subsidy ended before exit
		3 Current subsidy will continue
		4 Did not have subsidy
B If subsidy ended at exit, Reason Subsidy Ended	Field A, Response 1	1 No Subsidy
		2 Bridges
		3 County Funded
		4 GRH
		5 HOME
		6 HOPWA
		7 MHFA Rental Assistance
		8 Property Subsidy
		9 SHP Leasing
		10 Section 8
		11 Shelter Plus Care
		12 Sons of Bridges
		13 Other (specify)
C If Other, specify	Field B, Response 13	1 Text Field

UPDATING CLIENT’S RESIDENCE, HOUSING COST, AND HOUSING SUBSIDY INFORMATION

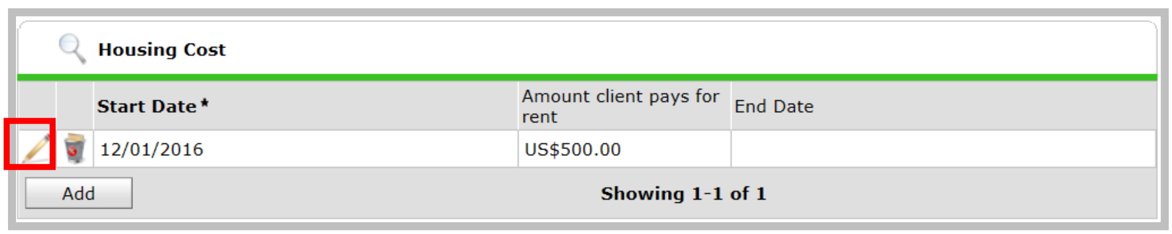
You are required to update the Client’s Residence, Housing Cost, and Housing Subsidy Information sub-assessment as client moves, subsidy changes, or amount the client pays for rent changes. This can be updated as the changes occur or documented when you complete your required interim update (every 6 months after entry). Sub-assessment records should cover the entire time a client is in the project, with no gaps and no overlaps.

DATA ENTRY STEP-BY-STEP

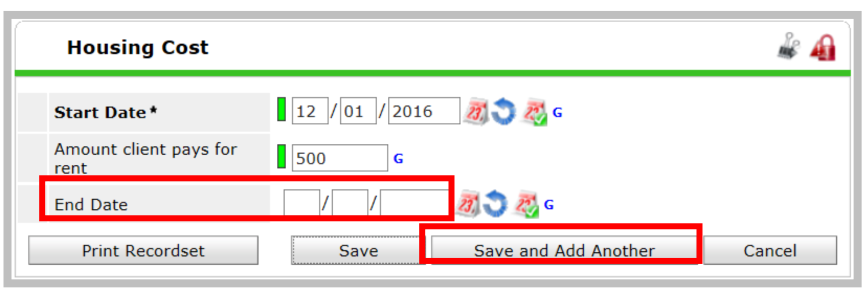
1. Enter EDA mode to the correct provider and enter the Head of Household’s record.
2. In the **Entry/Exit** tab, locate the appropriate Entry/Exit record.
3. Click on the **Interim Review** icon in the Interims column.



4. In the **Interim Review** pop-up, click on **Add Interim Review**.
5. If updating when the change occurs, create an Interim Review and select the type as Update. If updating at the 6-month required Interim Review, create an Interim Review and select the type as **6 Month Review.**
    a. Remember! If creating the required 6-month Interim Review, include all applicable household members. The 6-month Interim Review is required for all adults (18+) and youth heads of household.
6. Enter the **Review Date.**
    a. If creating a required **6 Month Review**, enter a date within the month the review is required, and the update is applicable for.
    b. If creating an **Update**, enter the date of the information change.
7. Press **Save & Continue**.
8. Locate the sub-assessment you are updating and add an End Date to the previous entry. To do so, click on the **Edit Pencil** to the left of the entry.

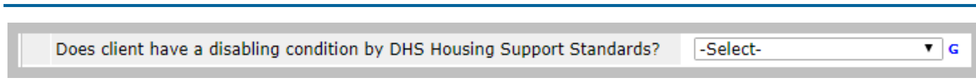


9. Add an **End Date**. No information should be changed, only an End Date should be added. After adding an End Date, click Save and Add Another.



10. Fill out the applicable fields in the sub-assessment according to the **Program-Specific Data Elements, Data Entry Step-by-Step** section of this document.
    a. The Start Date of the new entry should be one day AFTER the End Date for the previous entry. After completing all applicable fields, click on **Save**. *There should be no gaps or overlaps in entries.*

DOES CLIENT HAVE A DISABLING CONDITION BY DHS HOUSING SUPPORT STANDARDS?



Data Collected About: All Household Members
Data Collection Point: Project Start
Rationale: To specify that a person does not have to be certified as disabled by a federal or state government agency to have a disabling condition. Instead, this can be a condition, illness or injury that limits a person's self-sufficiency.
Data Collection Instruction: Collect information from the client to determine the answer to this question.

RESPONSE CODES

Field	Dependency	Response Category/Data Type
Does client have a disabling condition by DHS Housing Support standards?	No	1 Yes
		2 No

MAXIS ID

Data Collected About: Head of Household
Data Collection Point: Project Start
Rationale: MAXIS is a computer system used by state and county workers to determine eligibility for public assistance and health care. For cash assistance and food support programs, MAXIS also determines the appropriate benefit level and issues benefits. Recording the MAXIS ID in HMIS allows staff to easily look up client information across systems that they have access to.
Data Collection Instruction: Collect MAXIS ID information

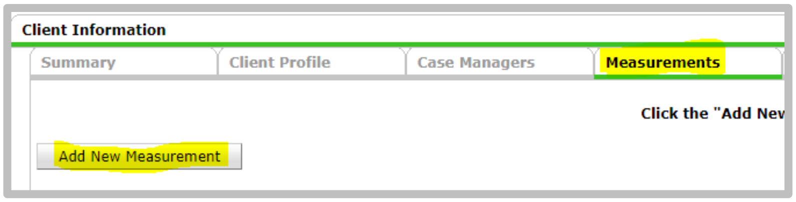
SELF-SUFFICIENCY OUTCOMES MATRIX (SSOM)

Data Collected About: Head of Household (Including Singles and Youth) and All Adults 18+
Data Collection Point: Project Start, Update (required every 6 months) and Exit
Rationale: The SSOM can be a useful engagement tool to work with participants to identify needs and goals. Additionally, the reports generated from this data provide a record of individual participant needs, progress, and outcomes.
Data Collection Instruction: All domains are required to have a 1-5 response unless the client is not parenting or does not have school-aged children. If client is not parenting or does not have school-aged children, answer N/A for Child Care and/or Children's Education domains. For detailed information on assessing domains, contact DHS directly. Ask the client how they would rank themselves, while showing/reading them each option in each of the categories based on the short form, found here: http://hmismn.org/wp-content/uploads/MN-Self-Sufficiency-Matrix-Short-Form.docx. The short form matches the information collected in HMIS. You should also jot down what you would assign to the client for each. If you and the client disagree on a domain score, select the lower of the two.

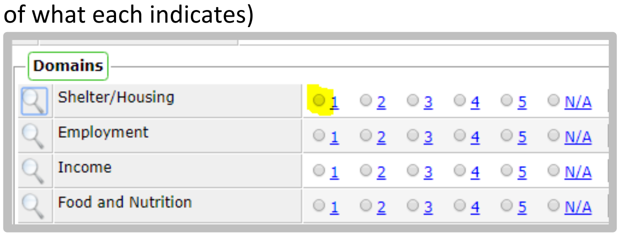
DATA ENTRY INSTRUCTIONS:

CREATING AN INITIAL SELF-SUFFICIENCY OUTCOMES MATRIX (SSOM)

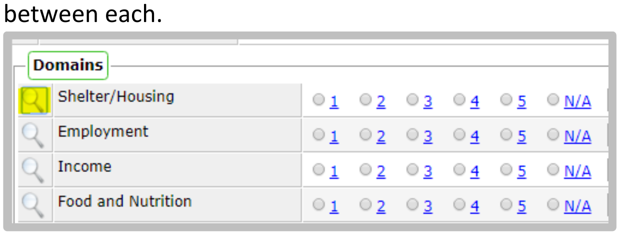
1. Confirm you are in **EDA mode** to the correct provider and in the correct client record.
2. In the **Measurements tab**, click on **Add New Measurement**.



3. In the Measurement pop-up, complete the following data elements.
    a. **Provider**: The provider you are in **EDA mode** to, or your home provider if you are not in **EDA mode**, will display here. This should be your DHS-HS provider. If not, exit the pop-up, enter **EDA mode** and start over.
    b. **Measurement Tool**: Select **Self-Sufficiency** from drop-down if it doesn't automatically populate
    c. **Point of Measurement**: Defaults to **Initial** as you are entering an initial matrix
    d. **Date**: Should match the **Project Start Date** used in the **Entry/Exit tab** (Date client entered your project)
    e. **Information Reported To**: Select a **ServicePoint User** or type the name of the person the matrix information was reported to by client by first selecting Other
4. Select Continue.
5. Complete all domains by either:
    a. Clicking on each **radio button** one-by-one (hovering over the blue numbers will have a description of what each indicates)



    b. Clicking on the **magnifying glass** next to the first domain and answering each domain. This provides detailed information about ranking each domain with a score. You'll click **Submit & Move to Next** between each.



6. Click on **Save & Exit**.

CREATING AN INTERIM MATRIX AT UPDATE AND FINAL MATRIX AT EXIT

1. Confirm you are in **EDA mode** to the correct provider and in the **correct client record**.
2. In the **Measurements tab**, click on **Add New Point of Measurement**.

Do not click Add New Measurement as this will prompt you to create a new Initial Matrix.

3. In the **Measurement** pop-up, complete the following data elements.

a. **Provider**: This will default to the same provider selected when you created the Initial Matrix.
b. **Measurement Tool**: This will default to the **Self-Sufficiency Matrix** as that is what was selected when you created the Initial Matrix.
c. **Point of Measurement**: Select **Interim** if completing an update between Entry and Exit; select **Final** if you are completing the final matrix as client exits your project
d. **Date**: A matrix is required every 6 months after client enters your project, and at exit. Use the **update date** (in 6-month increments) if completing an Interim Matrix or the **exit date** if completing a Final Matrix.
e. **Information Reported To**: Select a **ServicePoint User** or type the name of the person the matrix information was reported to by client by first selecting **Other**

4. Click on **Save & Exit**.

Tips!

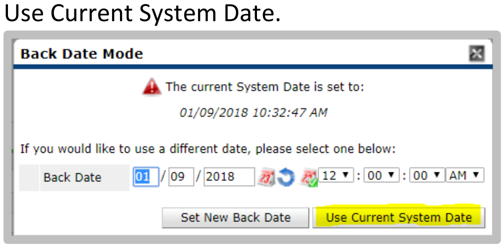
If a client exits and returns after 6 or more months, create a new Initial Matrix in the Measurements Tab.

If a client exits and return less than 6 months later, click on the Edit Pencil for the previously entered Final Matrix and change the Point of Measurement to Interim (leave date the same). Add a new matrix as of their new Project Start Date and select Interim for Point of Measurement.

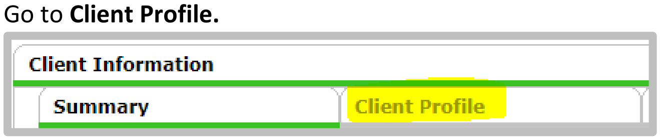
ATTACHING A PROFESSIONAL STATEMENT OF NEED (PSN)

Projects are required to attach a Professional Statement of Need

1. Confirm you are in **EDA mode** to the correct provider, and in the Head of Household's record.
2. Use Current System Date.

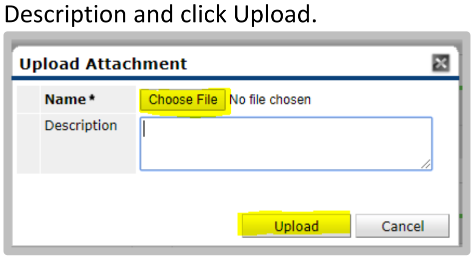


3. Go to **Client Profile.**



4. Scroll to the bottom of the page.
5. Click **Add New File Attachment** in File Attachments section.

6. **Choose File** from your computer for the Professional Statement of Need, click on **Open**. Add "**PSN**" to Description and click Upload.



7. The Professional Statement of Need is now attached to the client file.

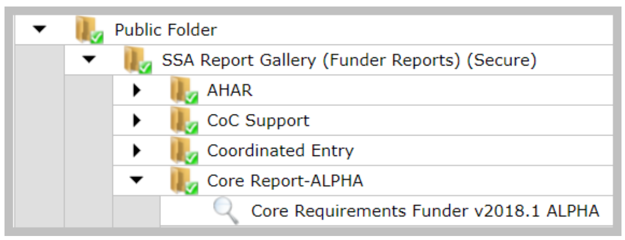
REPORTING GUIDELINES

THIS SECTION INTRODUCES THE DATA QUALITY AND FUNDER-REQUIRED REPORTS FOR DHS HOUSING SUPPORT PROJECTS. USERS SHOULD RUN DATA QUALITY REPORTS REGULARLY TO ENSURE THAT ACCURATE INFORMATION IS BEING PROVIDED TO FUNDERS AND OTHER AGENCIES. FOR INFORMATION ABOUT REPORTING PERIODS, DUE DATES, AND CHANGES TO REQUIREMENTS, REFER TO COMMUNICATIONS FROM FUNDER.

DATA QUALITY REPORTS

Report Name: Core Requirements Funder Report

Location: Public Folder -> SSA Report Gallery -> Core Report-ALPHA



Report Prompts:

Provider(s):	Enter the Provider ID(s) you want to run the report for
~~Reporting Group, if not running by provider:~~	Do not use unless instructed otherwise
~~EDA Provider~~	Do not use unless instructed otherwise
Enter effective date	Enter the last date of the reporting period PLUS one day (should match End Date)
Start date:	Enter the first date of the reporting period
End date:	Enter the last date of the reporting period PLUS one day (should match Effective Date)

FUNDER-REQUIRED REPORTS

As of now, ICA will be pulling the required report (Core Report) and send it to DHS on behalf of agencies. Check your email and the HMIS website (http://hmismn.org/) to look for notices from DHS to announce report due dates.