HMIS USER GUIDE FOR DHS OEO HYA PROJECTS

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

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.

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. 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**. 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: OEO HYA Shelter Assessment** or **MN: OEO HYA Youth Supportive Housing 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**.
UPDATE A CLIENT'S INFORMATION	Outcomes should be completed for each client participating in HYA YSH projects (TH, PH S, RRH) as well as for each ES stay that is longer than 30 consecutive days in HYA ES projects. An Outcomes Interim Review is required for every six-month reporting period. Create an Interim Review prior to each report due date. 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. Select **6 Month Review** from the **Interim Review Type** 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. c. Review the Outcomes data elements for each household member in the **Entry/Exit Interim Review** pop-up; where a change has taken place, update with the correct answer.

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, Reason for Leaving,** and **Destination**, then click on **Save & Continue.**
3. For ES projects, only **Reason for Leaving** and **Destination** are required at exit. For YSH projects, complete the **MN: Exit OEO HYA Youth Supportive Housing Assessment** for each household member. **Save & Exit.**
4. Record updated information on the **MN: HYA Outcomes Assessment** by creating a final **6 month Review** (or update one that had already been created that six month reporting period).
5. For YSH projects, on the **Case Plans** tab, click **Add Goal**. The **Goal** pop-up window will open. Complete the following fields:
   a. **Date Goal was Set:** Client's **Exit Date**.
   b. **Classification**: select "HYA YSH 6 Month" or "HYA YSH 24 Month."
   c. **Type:** select "YSH 6 Month Housing Goal" or "YSH 24 Month Housing Goal."
   d. **Target Date:** 6 or 24 months after the client's **Exit Date.**
   e. **Overall Status:** select "Identified" or "In Progress."
   f. For detailed **Case Plans** instructions, refer to the How To: Case Plans section.

Following Up with a Client

HYA YSH projects (TH, PH S, and RRH) are required to track follow-up information for clients at 6 and 24 months after exit using Goals, which are located on the Case Plans tab in HMIS.

1. Enter **EDA mode** to the correct provider and open the client's record.
2. On the **Case Plans** tab, click the pencil to the left of the **Goal** to edit the information. Complete the remainder of the **Outcome** fields.
3. For detailed **Follow-Ups** instructions, refer to the How To: Follow-Ups section.

RUN A REPORT

For more information about DHS OEO HYA Reports, refer to the user guide section titled Reporting Guidelines.

1. Click on **Reports** to open the **Report Dashboard**. Select **ART**.
2. Schedule reports for **DHS OEO HYA** located in Public Folder → SSA Report Gallery → HYA Shelter or Public Folder → SSA Report Gallery → HYA Youth Supportive Housing
3. Select the report you wish you run, fill out the prompts, then click **Next**, fill out **Report Format** and **Interval**, and then click on **Send**.
4. Send reports to funder as PDF email attachments.

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR DHS OEO HYA 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

OEO HYA ES Household Entry/Exit

OEO HYA YSH Household Entry

OEO HYA YSH Household Exit

INDIVIDUALS

OEO HYA ES Single Entry/Exit

OEO HYA YSH Single Entry

OEO HYA YSH Single Exit

OEO HYA Outcomes

OEO HYA Follow-Ups

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 by request from Andrea Simonett at the MN Department of Human Services.

REFERRAL SOURCE

Project Type Applicability: All Project Types

Data Collected About: Head of Household and Adults

Data Collection Point: Project Start

Data Collection Instructions: Referral source indicates the person, place, or organization that referred the client to the project they are entering. Enter one referral source that most closely matches the client's answer. If more than one organization provided a referral, enter only one that most closely matches the referral source.

Field		Dependency	Response Category/Data Type
A	Referral Source	None	Emergency Shelter
			Drop-In Center
			Street Outreach
			Friend
			Family Member
			Social Service Provider
			School Staff
			Health Provider
			Self
			Other

REASON FOR LEAVING

Project Type Applicability: All Project Types

Data Collected About: All Clients

Data Collection Point: Project Exit

Data Collection Instructions: This is required in addition to answering "Destination at Exit."

Field		Dependency	Response Category/Data Type
A	Reason for Leaving	None	Completed program
			Non-payment of rent
			Reached Maximum Age Allowed
			Reached maximum time allowed

		Criminal activity / violence
		Voluntarily Withdrew From Program
		Left for Housing Opportunity Before Reaching Maximum Time Allowed
		Non-compliance with program
		Unknown/Disappeared
		Needs could not be met
		Death
		Other

MOST APPROPRIATE/IDEAL LONG-TERM LIVING SITUATION

Project Type Applicability: Transitional Housing (TH), Permanent Housing with Services (PH S), Rapid Re-Housing (RRH)

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

Data Collection Instructions: In your judgment, what type of housing does this client need over the long term, regardless of where they are going? Using your professional judgment does the head of household have a physical, mental, or emotional impairment that is expected to be of long-continued and indefinite duration, and substantially impedes his or her ability to live independently without on-going support services? If yes, the client is in need of Permanent Supportive Housing.

Field		Dependency	Response Category/Data Type
A	Most appropriate/ideal long term living situation	None	Transitional Housing
			Permanent Supportive Housing
			Permanent Housing without services
			Treatment Facility
			Other
			Unable to determine

OUTCOMES MEASURED

Project Type Applicability: 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).

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
B	If **Yes**, did they obtain employment during the reporting period?	Field A; Response 1	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
B	If **Yes**, did they obtain it during the reporting period?	Field A; Response 1	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

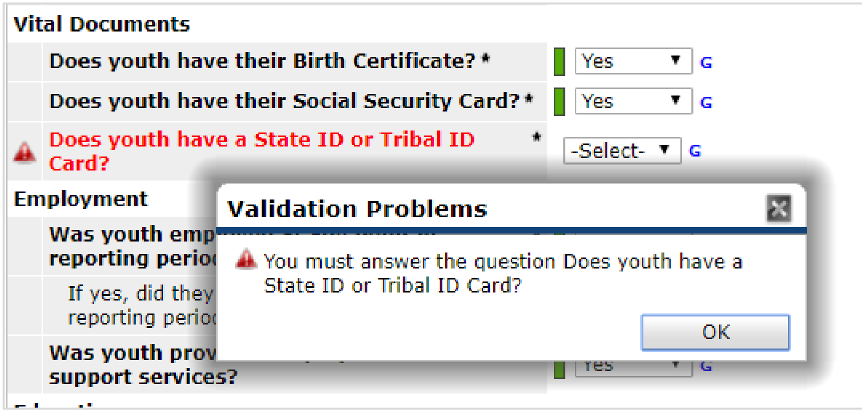
Field		Dependency	Response Category/Data Type	
A	Has the youth exchanged sex acts for money, a place to stay, clothing, food, drugs, transportation, or other things to meet their needs?	None	1	Yes
			2	No
B	If **Yes**, has the youth been offered or referred to Safe Harbor services?	Field A; Response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

HOW TO: INTERIM REVIEW

1. If a client is enrolled in your program *at any point* during the six-month reporting period (excluding ES stays that are fewer than 31 days), 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 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 Outcomes!
2. When to create an Interim Review for your project type:
    a. **HYA YSH projects:** 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.
    b. **HYA ES projects:** Create a **6 Month Review** for each shelter stay that is longer than 30 consecutive days that falls within the six-month reporting period.
    c. Below are the date ranges for the six-month reporting periods:
        1st six-month report period: July 1 - December 31, 2017
        2nd six-month report period: January 1 - June 30, 2018
        3rd six-month report period: July 1 - December 31, 2018
        4th six-month report period: January 1 - June 30, 2019
3. From the Entry / Exit tab, under the Interim heading, click on the correct Entry / Exit you're wanting to create an Interim Review for.
4. Select **6 Month Review** for Interim Review Type. Review Date should fall within the 6-month reporting period you're recording data and 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.
    a. ***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:

b. 

c. 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.

6. Best practice is to update outcomes as a client meets a goal, so you are prepared for reporting. As you update outcomes during the reporting period, update the **6 Month Review** you've created for that reporting period.
7. At client's exit, update the **6 Month Review** that falls within the reporting period at exit so that the answer to the Outcomes assessment are current as of exit date.
8. **Scenario:** A client enters your housing program with a project start date of 10/4/2017 and exits on 6/21/2019. Correct Outcomes assessment data entry would include four Interim Reviews completed with the following Interim Review dates as possibilities: 12/15/2017, 3/20/2018, 10/16/18, and 6/21/2019. Note that each review that has been completed is a **6 Month Review** and there is one review completed within each six-month reporting period:

Interim Reviews Associated with this Entry / Exit

		Review Date	Review Type	Client Count
		06/21/2019	6 Month Review	
		10/16/2018	6 Month Review	
		03/20/2018	6 Month Review	
		12/15/2017	6 Month Review	

9. If a client reenters your program, when you create a new Interim associated with the new Entry/Exit you'll see previously entered Outcomes. You can continue to track these even if the outcome was accomplished in previous enrollment.

FOLLOW-UP AFTER EXIT FOR HYA YOUTH SUPPORTIVE HOUSING

HYA YSH projects (Transitional Housing (TH), Permanent Housing with Services (PH S), Rapid Re-Housing (RRH)) are required to track follow-up information for clients at 6 and 24 months after exit using Goals, which are located on the Case Plans tab in HMIS. Case Plans allow you to set a Goal for your clients at exit and track their progress after they have left your project.

HOW TO: CASE PLANS

1. Make sure that you have ended all services, completed exit information, and are also in the correct EDA provider.
2. From the head of household's record, click on the **Case Plans** tab.
3. Click **Add Goal**. The **Goal** pop-up window will open.
4. Select the head of household ONLY
5. Complete **Goal** information:
    a. **Provider:** Must match the client's entry/exit provider! If wrong provider populates, this is a quick indication you are not in correct EDA mode.
    b. **Case Manager:** Optional
    c. **Date Goal was Set:** Must match the client's project exit date!

FOR 6 MONTH FOLLOW-UPS

1. **Classification:** select "HYA YSH 6 Month Goal"
2. **Type:** select "YSH 6 Month Housing Goal"
3. **Goal Description:** optional
4. **Target Date:** add 6 months to the client's exit date (Exit Date = Date Goal was Set)

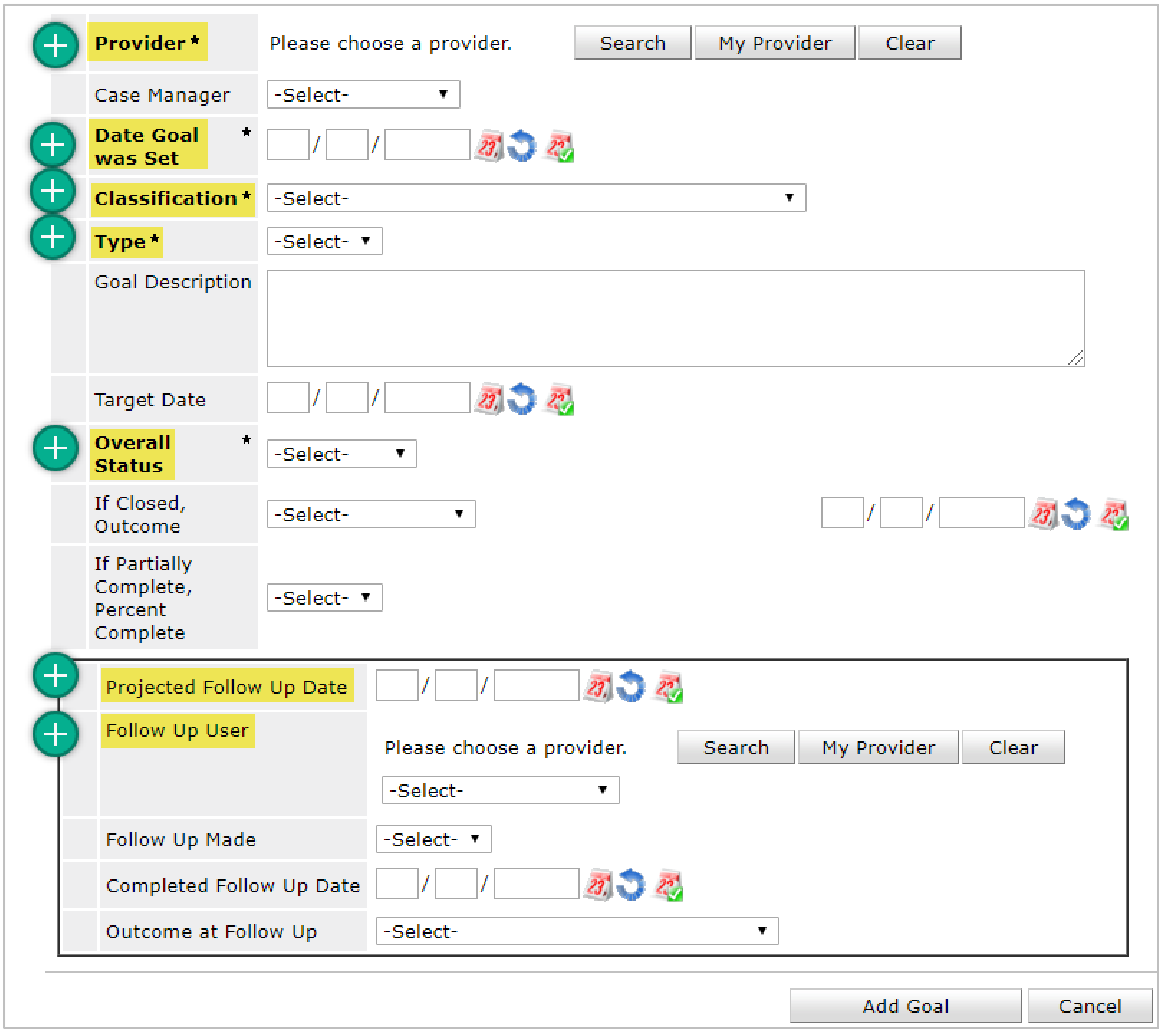
FOR 24 MONTH FOLLOW-UPS

1. **Classification:** select "HYA YSH 24 Month Goal"
2. **Type:** select "YSH 24 Month Housing Goal"
3. **Goal Description:** optional
4. **Target Date:** add 24 months to the client's exit date (exit date = date goal was set)

NOTE: If you are creating a goal for a follow-up that has already been completed (i.e., if you are catching up on old data entry), skip to Step 3 in How To: Follow-Ups.

FOR ALL GOAL TYPES

1. **Overall Status:** select either "Identified" or "In Progress" from the list
    a. There are no meaningful differences between the two in reports
2. **If Closed, Outcome:** leave blank
3. **If Partially Complete, Percent Complete:** leave blank
4. **Projected Follow-up Date:** You can use the same dates as the **Target Dates** you entered above. You may also, however, enter an earlier date if you wish to follow-up with the client before the Target Date to make sure they are on track to meet their goal.
5. **Follow Up User:** Use this field to determine among the HMIS users at your agency whose home screen the follow-up reminder will appear on.
6. Remaining questions: leave blank
7. Fields with the icon next to them should be completed when creating a **Goal:**



8. Click **Add Goal.**
9. Click **Save and Exit.**

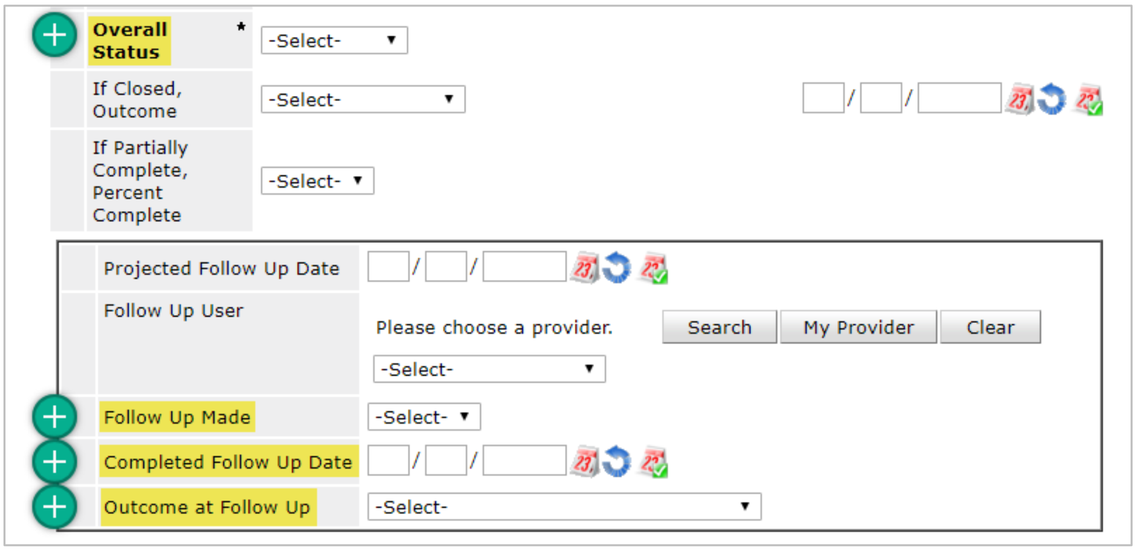
HOW TO: FOLLOW-UPS

Follow up on clients' case plans 6 and 24 months after they leave the project. Note that attempting to contact a client counts as a follow-up, even if actual contact is not made.

1. Log in to ServicePoint and EDA to the correct provider.
2. Retrieve your client's goal information:
    a. On the Home Page Dashboard, locate the follow-up list section.
        i. Click the client ID to go to the client's record or click the blue "goal" hyperlink to go directly to the client's goal.
    b. OR, look up your client's name or ID number in the system and click on the "Case Plans" tab. Click the pencil to the left of the goal to edit the information.
3. Update or complete the following fields:
    a. **Overall Status:** change to "Closed"
    b. **If Closed, Outcome:** leave blank
    c. **Date field:** leave blank

   d. **If Partially Complete, Percent Complete:** leave blank
   e. **Projected Follow-up Date:** leave date that was previously entered.
   f. **Follow-up Made**: select "Yes" or "No" *(Select "Yes" even if you attempted to contact the client but were not able to make contact.)*
      i. If **Follow Up Made** = "Yes," then:
         1. **Completed Follow Up Date:** enter the 6 or 24 month follow-up date according to the type of follow up.
         2. **Outcome at Follow Up:** select "Achieved," "Not Achieved," or "Unknown – unable to contact"
      ii. If **Follow Up Made** = "No," then:
         1. **Completed Follow Up Date:** DO NOT COMPLETE
         2. **Outcome at Follow Up:** DO NOT COMPLETE
   g. **Case Notes, Action Steps, Service Items**: Optional

4. Fields with the icon next to them should be completed when updating a **Goal** for 6 or 24 month follow-ups**:**



5. Click **Add Goal** (NOTE: You will only see this if you skipped to Step 3 from the previous page.)
6. Click **Save & Exit**

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.

DATA QUALITY REPORTS

HYA ES Reports:

HYA Shelter - Entry/Exits-Demographics Data Check
HYA Outcomes (in "Counting" folder)

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → HYA-Shelter → HYA-Shelter-Data check

HYA YSH Reports:

HYA YSH Demographics and Entry Data Check
HYA YSH Exits Data Check
HYA YSH Income Data Check
HYA YSH Follow-Up Summary Detail (in "Counting" folder)
HYA Outcomes (in "Counting" folder)

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → HYA-Youth Supportive Housing → HYA-Youth Supportive Housing-Data Check

Required Prompts:

- 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
- EDA Provider: Can be left blank except in rare cases
- Enter Start Date: The first day of the reporting period
- 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
- Enter Biennium Start Date: Leave as is (correct date is pre-populated)
- Enter Biennium End Date (PLUS 1 Day): Leave as is (correct date is pre-populated)

Data Quality Instructions: Agencies should run data quality reports regularly to ensure that accurate information is being recorded and to address any data errors indicated. These reports contain client identifying information and should never be sent to your funder.

FUNDER-REQUIRED REPORTS

HYA ES Reports:

HYA Shelter Entry/Exits-Demographics and Entry
HYA Outcomes (Same report used for Data Quality)

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → HYA-Shelter → HYA-Shelter-Counting

HYA YSH Reports:

HYA YSH Demographics and Entry Counting
HYA YSH Exits
HYA YSH Follow-Up Summary Detail (Same report used for Data Quality)
HYA YSH Income Counting
HYA Outcomes (Same report used for Data Quality)

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → HYA-Youth Supportive Housing → HYA-Youth Supportive Housing-Counting

Required Prompts:

- 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
- EDA Provider: Can be left blank except in rare cases
- Enter Start Date: The first day of the reporting period
- 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
- Enter Biennium Start Date: Leave as is (correct date is pre-populated)
- Enter Biennium End Date (PLUS 1 Day): Leave as is (correct date is pre-populated)

Submission Frequency: Twice per calendar year.

Submission Instructions: Rely on funder communication for report periods, due dates, or changes to requirements. All reports should be saved as PDF files and emailed to funder.