

DHS-OEO HYA HMIS User Guide

Purpose: To provide supplemental data entry and reporting instructions specific to DHS-OEO HYA.

Contents

Quick Reference Guide	2
Where to find the Data Collection Forms	4
Program Specific Data Elements.....	4
Reports	9

Helpdesk Contact Information:
Helpdesk: HMISMN@icalliances.org Online: HMISMN.org

Quick Reference Guide for DHS-OEO HYA

Youth Supportive Housing (YSH) and Emergency Shelter (ES)

Client Record	<ol style="list-style-type: none"> 1. Click on “Enter Data As” (EDA) and select the correct provider to enter EDA mode. 2. In ClientPoint, fill out different combinations of search prompts for primary client (single or head of household) to search for an existing record. Select primary client’s name in the search results or confirm no records match. If no records match, complete all search prompts and click “Add New Client With This Information.” 3. Backdate to client’s entry date (in pop-up or by clicking on “Back Date”). 4. Complete the <i>Universal Profile Assessment</i> for the primary client in the Client Profile tab. ◀ 5. Create a household in the Household tab if primary client is being served with other HH members. ◀ <p>Reminder! If you created a new client record and the client consented to statewide data sharing, be sure to add SHARED in the Alias Field and complete the Date of ROI Consent in the Client Profile tab.</p>
Entry	<ol style="list-style-type: none"> 1. Enter EDA mode to the correct provider and open the primary client’s record. 2. Create an Entry record in the Entry/Exit tab. <ul style="list-style-type: none"> ■ If entering a household, be sure to include all applicable HH members in the entry by checking the boxes. ■ Select Basic for “Type.” 3. Complete data elements (for each household member) on the MN: OEO HYA Youth Supportive Housing/Shelter Assessment in the Entry/Exit Data pop-up. <ul style="list-style-type: none"> ■ If entering a household, first click on “Add Household Data” to complete the <i>Household Data Sharing Assessment</i> and answer data elements common among all clients prior to completing each individual entry assessment.
Updates	<p><i>Updates are required as client makes progress on identified outcomes. Update prior to report due date.</i></p> <ol style="list-style-type: none"> 1. Enter EDA mode to the correct provider and open the primary client’s record. 2. Record Outcomes information in the Entry/Exit tab. <ul style="list-style-type: none"> ■ Click on the Interims icon next to the HYA Basic Entry and select 6 Month Review for “Interim Review Type.” ■ The “Review Date” should be within the 6-month reporting period. <ul style="list-style-type: none"> ■ Complete data elements on the MN: OEO HYA Outcomes Assessment.
Exit	<ol style="list-style-type: none"> 1. Enter EDA mode to the correct provider and open the primary client’s record. 2. Create an Exit record in the Entry/Exit tab by clicking on the Edit Exit pencil. If exiting a household, be sure to include all applicable HH members in the exit by checking the boxes. 3. Complete data elements (for each household member) on the MN: Exit OEO HYA Youth Supportive Housing/Shelter Assessment in the Entry/Exit Data pop-up. <ul style="list-style-type: none"> ■ If exiting a household, be sure to complete each individual exit assessment. 4. Update data elements on the MN: OEO HYA Outcomes Assessment in the Entry/Exit Data pop-up. ◀ <ul style="list-style-type: none"> ■ If additional enrolled youth are part of the HH, go to their record to update their <i>Outcomes Assessment</i>. 5. “Add Goal” for the primary client in the Case Plans tab for 6 month follow-up and another for 24 month follow-up for Youth Supportive Housing clients (this is not required for Emergency Shelter). <ul style="list-style-type: none"> ■ <i>6 Month Follow Up Goal:</i> Date Goal was Set=Exit Date • Classification=HYA YSH 6 Month Goal • Type=YSH 6 Month Housing Goal • Overall Status= Identified • Target Date and Follow-up Date = 6 months after exit ■ <i>24 Month Follow Up Goal:</i> Date Goal was Set=Exit Date • Classification=HYA YSH 24 Month Goal • Type=YSH 24 Month Housing Goal • Overall Status= Identified • Target Date and Follow-up Date = 24 months after exit ■ Add a Follow-Up User to both goals so the user is prompted on their Home Screen to complete the follow-up.
Follow-ups	<p><i>Follow-ups are required for primary client (single or head of household) and are due 6 months and 24 months after the client exits your YSH project. Follow-ups are not required for Emergency Shelter projects.</i></p> <ol style="list-style-type: none"> 1. Enter EDA mode to the correct provider and open the primary client’s record. 2. Update and complete Goals in the Case Plans tab. <ul style="list-style-type: none"> ■ Overall Status=Closed • If Closed, Outcome (Date = Date Closed) • Follow-up Made=Select Yes even if attempt to contact was unsuccessful • Completed Follow-Up Date=6 or 24 Month Follow-up Date • Outcome at Follow-Up

Data quality reports are for agency use; never send these reports to funder.

- 1. In Reports, click on ART.**
- 2. Run data quality reports on a regular basis (at least quarterly) for DHS-OEO HYA located in Public Folder → SSA Report Gallery →**
(For ES) HYA-Shelter → HYA-Shelter-Data Check
 - HYA Shelter for Programs Recording Entry/Exits-Demographics Data Check | Run if using the above “entry/exit” workflow
 - HYA Shelter for Programs Recording Services-Demographics Data Check | Run if using the “services” workflow covered on a different document
 - Outcomes Report coming soon!**(For YSH) HYA-Youth Supportive Housing → HYA-Youth Supportive Housing-Data Check**
 - HYA YSH Demographics and Entry Data Check
 - HYA YSH Exits Data Check
 - HYA YSH Follow-Up Data Check
 - HYA YSH Income Data Check
 - HYA YSH Outcomes Data Check (coming soon!)

Rely on funder communication for report periods, due dates, or changes to requirements.

- 1. In Reports, click on ART.**
- 2. Run reports for DHS-OEO HYA located in Public Folder → SSA Report Gallery →**
(For ES) HYA-Shelter-Counting
 - HYA Shelter for Programs Recording Entry/Exits-Demographics and Entry
 - HYA Shelter for Programs Recording Services-Demographics and Services
 - Outcomes Report coming soon!**(For YSH) HYA-Youth Supportive Housing → HYA-Youth Supportive Housing-Counting**
 - HYA YSH Demographics and Entry Data Counting
 - HYA YSH Exits
 - HYA YSH Follow-Up Counting
 - HYA YSH Income Counting
 - HYA YSH Outcomes Counting Report (coming soon!)
- 3. Send reports to funder as PDF email attachments.**

◀ Correct use of backdate is crucial to accurate reporting for this step.

Data Collection Forms

Please go to: <http://hmismn.org/forms-and-instructions/> for the Data Collection Forms

Forms: Last Updated October 1, 2017

Emergency Shelter

- OEO HYA ES Single-Start-End (3.917b)
- OEO HYA ES Household Start-End

Youth Supportive Housing

- OEO HYA YSH Single Entry
- OEO HYA YSH Single Exit
- OEO HYA YSH Household Entry
- OEO HYA YSH Household Exit
- OEO HYA Follow-Ups (See also: "Tracking HYA YSH Follow-Ups Using Goals")
- OEO HYA Outcomes (NEW 2017 Outcomes Form!)

Reminder: You are not required to use our data collection forms. Consult with your agency on other data you may collect at intake that is not required by HMIS. We update the forms every year with the new HUD and Minnesota data standards changes.

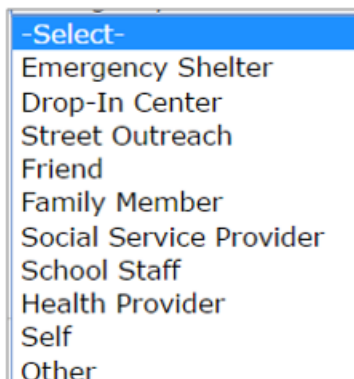
Program Specific Data Elements

Referral Source

Subjects: Head of Household (Including singles and unaccompanied youth) and all adults

Data Collection Points: Project Entry

- **Referral Source = Who referred the client to your project?**
- **Response Options:**



A dropdown menu with a blue header containing the text "-Select-". Below the header, the following options are listed in a standard font:

- Emergency Shelter
- Drop-In Center
- Street Outreach
- Friend
- Family Member
- Social Service Provider
- School Staff
- Health Provider
- Self
- Other

Adding Outcomes

Subjects: All HYA clients

Data Collection Points: The Outcomes Assessment was developed to capture services provided by the agency, as well as outcomes achieved by participants. Youth Supportive Housing projects complete applicable data elements on the *MN: OEO HYA Outcomes Assessment* as the client completes outcomes. Emergency Shelters complete the *MN: OEO HYA Outcomes Assessment* when client has been served for 30 days.

- A.** The “MN: OEO HYA Outcomes” (“Outcomes”) assessment tracks a client’s progress for 8 outcome or goal areas which the client identifies, works towards, and/or completes while in your program. This assessment is located in the Interim section on the Entry/Exit tab of the client’s record and should be updated as the client makes progress.
- B.** Data should be recorded for each outcome the client identifies, works towards, and/or completes.
- C.** If entering data for the previous reporting period, backdate to the last day of that reporting period. Backdating can be helpful in certain situations such as entering or updating multiple outcome areas for the same day (such as program entry or exit).
- D.** Best practice is to update outcomes as a client meets a goal so you are prepared for reporting. Update this assessment at least quarterly and prior to report due dates.
- E.** Outcome activities contain “yes/no” statements that providers are expected to complete for each youth in the program. For some statements, there are “If yes...” clauses that require additional information.
- F.** If a youth reenters your program, you can continue to track outcomes started in the previous program entry.
- G.** If a youth is enrolled in your program at any point during the 6 month reporting period, you must create a 6 month Review and answer/update the MN OEO HYA Outcomes assessment questions.

Start Date of 1st report period: July 1, 2017(End Date: December 31)

Start Date of 2nd report period: January 1, 2018 (End Date: June 30)

Start Date of 3rd report period: July 1, 2018 (End Date: December 31)

Start Date of 4th report period: January 1, 2019 (End Date: June 30)

Outcomes Measured

1. Case Plan Development
2. Vital Documents
3. Employment
4. Education
5. Connections
6. Foster Care Benefits
7. Medical
8. Connection to Safe Harbor

Reason for Leaving

Subjects: All HYA Youth Support Housing Clients – “program eligible clients”

Data Collection Points: Project Exit

This is required in addition to answering “Destination at Exit”

Reason for Leaving	-Select-
	-Select-
	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

Subjects: All HYA Youth Support Housing Clients – “program eligible clients”

Data Collection Points: Project Exit

Most appropriate/ideal long term living situation	-Select-
	-Select-
	Transitional Housing
	Permanent Supportive Housing
	Permanent Housing without services
	Treatment Facility
	Other
	Unable to determine

Follow-up after Exit for HYA Youth Supportive Housing

HYA YSH projects are now required to track follow-up information for youth 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 housing goal for your clients at exit and track their progress after they have left your project.

A. Enter Case Plans

1. Make sure that you have ended all services and completed exit information and also in correct EDA.
 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 case plan information:
 - a. Provider: Must match the client's entry/exit provider!
 - b. Case Manager: Optional
 - c. Date Goal was Set: Must match the client's project exit date!
- For 6 Month Follow Ups:
 1. Goal classification: select "HYA YSH 6 Month Goal"
 2. Type: select "YSH 6 Month Housing Goal"
 3. Goal description: optional
 4. Target date: enter a date 6 months after the exit date (date goal was set)
 - For 24 Month Follow Ups:
 1. Goal classification: select "HYA YSH 24 Month Goal"
 2. Type: select "YSH 24 Month Housing Goal"
 3. Goal description: optional
 4. Target date: enter a date 24 months after the exit date (date goal was set)
 - a. **NOTE: If you are creating this 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 section B. Follow-up.**
 5. Overall status: select either "Identified" or "In Progress" from the list
 - a. There are no meaningful differences between the two in reports
 6. If "Closed," Outcome: leave blank
 7. If Partially Complete, Percent Complete: leave blank
 8. Projected Follow-up date: enter the target date or a date of your choosing, if you wish to follow-up with the client sooner to make sure they are on track to meet their goal by the target date
 - a. The days remaining until your client's follow-up date will appear on the main screen whenever you log into ServicePoint
 9. 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
 10. Remaining questions: leave blank
 11. Click Add Goal.
 12. Click Save and Exit.

B. Follow-Up

- Follow up on clients' case plans 6 and 24 months after they leave the project.
 1. Log in to ServicePoint and EDA to the correct provider.
 2. Retrieve your client's goal information:

- On the Home Page Dashboard, locate the follow-up list section.
- Click the client ID to go to the client's record, or click the blue "goal" text to go directly to the client's goal.
- 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. Complete the following follow-up information:

- Overall Status: change to "closed"
- If "Closed," Outcome: select outcome.
- Date: enter date closed.
- If partially complete, percent complete: select percentage completed.
- Completed follow-up date: enter the 6 or 24 month follow-up date according to the type of follow up
- Follow-up made: select "Yes" or "No"
- Select "Yes" even if you attempted to contact the client, but were not able to make contact
- If Follow-up made = "Yes," then
- Completed Follow-up date: enter the 6 or 24 month follow-up date according to the type of follow up
- Outcome at Follow-Up: select "Achieved," "Not Achieved," or "Unknown - unable to contact"
- If Follow-up made = "No," then
- Completed Follow-up date: DO NOT complete
- Outcome at Follow-up: DO NOT complete
- Case Notes, Action Steps, Service Items: Optional

4. Click Add Goal (NOTE: You will only see this if you skipped to Step 3 from the previous page.)

5. Click Save & Exit

Reports

Shelter Programs and Youth Supportive Housing Programs have similar, but separate reports. Each has their own folder in ART including both data check and counting reports.

Make sure to run the data check reports to review all the clients and make sure the right ones are showing up on the reports and to identify clients with missing or incorrect information and make the necessary data fixes.

Current versions of reports only include data elements required before October 1st, 2014. Please make sure to continue to collect all required data elements as the next set of reports will include all required questions for all clients served.

All counting reports should be saved as PDFs and emailed to OEO staff.

Outcomes report is required for both Shelter and Youth Supportive Housing program types:

The DHS OEO HYA Outcomes Report is being rebuilt to reflect the significant changes in the Outcomes assessment. Instructions for running this report will be added when the report has been released.

Shelter Programs:

Demographic and Entry Report:

There are two versions of this report. Shelter programs can decide if they want to use services or entry/exits as their main method of tracking client enrollment start and end. Because of this, there is a report based on using services and a report based on entry/exits. Only one version needs to be run and submitted to OEO.

This report is based on the HYA Shelter Assessment questions and is similar to other state funder required reports. There are five tabs on the report that are similar between both versions.

- **Demographics:** summarizes basic demographic and household information for both all clients and heads of household (including Singles and Unaccompanied Minors)
- **Entry data (two tabs):** summarizes most housing related information from the assessment by heads of households (including Singles and Unaccompanied Minors)
- **Adults 18+:** summarizes questions required for only adults
- **Exit:** summarizes number of households exited and their length of stay

The services based report has one additional tab:

- **Services:** provides a summary of services recorded

Outcomes report:

The DHS OEO HYA Outcomes Report is being rebuilt to reflect the significant changes in the Outcomes assessment. Instructions for running this report will be added when the report has been released.

Youth Supportive Housing Programs:

Youth Supportive Housing programs have three reports required based on the program entry/exit and the HYA Youth Supportive Housing Assessment (note: if you have used the OEO THP reports, these are the same design):

Demographics and Entry (includes disabilities): includes demographics and other key information about clients. The report includes five tabs:

- **Demographics:** summarizes basic demographics and household information for both all clients and Heads of Household (including Singles and Unaccompanied Minors)
- **Entry data (2 tabs):** summarizes most housing related information from the assessment by Heads of Household (including Singles and Unaccompanied Minors)
- **Adults 18+:** summarizes questions required for only adults
- **Exit:** summarizes number of households exited and their length of stay

Exits: includes both current and exited clients for length of stay plus additional information for clients who have exited

Income (only for exited clients): focuses on income and non-cash benefits for clients who have exited the program comparing program entry and exit sources and amounts. Income and non-cash benefit information can be particularly difficult to enter and update. Please make sure you are looking closely at client level data to make sure the sources and amounts are correct for clients. Information is also broken out by reason for leaving the program. This report has seven tabs:

- **Income at Entry-Exit:** summarizes income information into categories and compares household income at entry and exit
- **Income Source Totals:** groups different income sources into four main types: no income, wages (earned income), non-wage income (all other income sources), and both.
- **Income Source Counts:** shows the count of each income source type at entry organized into four categories: no income, wage income (earned income), cash income (all other sources from the income sub-assessment and non-cash (from the non-cash benefits sub-assessment)
- **Income Source Counts at Exit:** the same as the previous tab, but focused on income sources at exit
- **Income and Benefits Last 30 Days:** counts at entry of general income received from any source in last 30 days and benefits received from any income source in last 30 days
- **Income and Benefits Last 30 Days at Exit:** same as previous tab, only at exit
- **Income Changes Entry to Exit:** summarizes client income change to better understand whose income went up, stayed the same, or decreased

Data quality reports are for agency use; never send these reports to funder.

1. In Reports, click on ART.

2. Run data quality reports on a regular basis (at least quarterly) for DHS-OEO HYA located in **Public Folder**→ **SSA Report Gallery**→**(For ES) HYA-Shelter**→**HYA-Shelter-Data Check**
 - HYA Shelter for Programs Recording Entry/Exits-Demographics Data Check | Run if using the above “entry/exit” workflow
 - HYA Shelter for Programs Recording Services-Demographics Data Check | Run if using the “services” workflow covered on a different document
 - HYA Shelter Outcomes Data Check (coming soon!)

(For YSH) **HYA-Youth Supportive Housing**→**HYA-Youth Supportive Housing-Data Check**

- HYA YSH Demographics and Entry Data Check
- HYA YSH Exits Data Check
- HYA YSH Follow-Up Data Check
- HYA YSH Income Data Check
- HYA YSH Outcomes Data Check (coming soon!)

Reports Required by Funder: Rely on funder communication for report periods, due dates, or changes to requirements. Send reports to funder as PDF email attachments.

1. In Reports, click on ART.
2. Run reports for DHS-OEO HYA located in **Public Folder**→ **SSA Report Gallery**→ **(For ES) HYA-Shelter-Counting**

- HYA Shelter for Programs Recording Entry/Exits-Demographics and Entry
- HYA Shelter for Programs Recording Services-Demographics and Services
- HYA Shelter Outcomes Counting Report (coming soon!)

(For YSH) **HYA-Youth Supportive Housing**→**HYA-Youth Supportive Housing-Counting**

- HYA YSH Demographics and Entry Data Counting
- HYA YSH Exits
- HYA YSH Follow-Up Counting
- HYA YSH Income Counting
- HYA YSH Outcomes Counting Report (coming soon!)