

West Central CoC Data Sharing Pilot Training

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AMHERST H.
WILDER
FOUNDATION

Here for good.

Data Sharing Elements

- Consent Form
- ROI – paper form
- Visibility (Padlocks)
- ROI in ServicePoint

Consent Form

- Client Notice and Consent and Release of Information
 - Explains to clients how the data entered into HMIS is used
 - If a client agrees to have their identifiable information in the system, the form is signed
 - If a client does not want their identifiable information in system, write Refused on the consent form and enter the client in as “anonymous”
- Collect consent and signatures directly from each person 18 and older, and get permission from parents or guardians about their entering their children’s name and social security numbers.
- If the client is opposed to even Wilder seeing the data (does not want any identifiable information on them in the system and does not sign form), you can enter them as an anonymous client.

Release of Information (ROI) – Paper form

■ HMIS Release of Information

- Allows clients to choose what type of data they are comfortable sharing, and indicate which agencies they are comfortable sharing data with.
 - Client can choose to share or not share with pre-selected agencies in the WC network of providers
- Clients can also choose which data elements are shared
 - Name, Demographics, Household information
 - West Central Assessment (with VI-SPDAT)
 - Household data sharing assessment
 - Entry/Exit dates and providers
 - Services
 - Homeless Status
 - Military Status
 - Disability Status
 - Living situation and housing history

Visibility set-up

- Default visibility was set up on May 21st, 2014
- Any data entered before this date is closed and will need to be opened up for sharing based on client preferences.
- Data entered as of May 21st follows new data sharing set-up to allow sharing of name and social security number. If ROI is completed and granted, demographics, entry/exit, services and West Central Assessment, Household data sharing assessment, and VI-SPDAT will also be shared.

Visibility Padlocks

- There is one main padlock for the client record
 - This padlock controls if name and social security number can be shared
 - Default settings:
 - Clients entered before May 21st 2014: main padlock is closed
 - New clients entered on or after May 21st: main padlock is set to open

ROI Tab

- Completing the ROI in Servicepoint allows these additional data elements to be shared with network providers.
 - Demographics
 - West Central Assessment and VI-SPDAT sub-assessment
 - Household data sharing assessment
 - Entry/Exits
 - Services
- Multiple ROI's must be completed
 - User provider
 - Program provider(s)
- Start date: 1/1/2000 (for all clients in data sharing pilot)
- End date: one year later after program entry/service start

Client Choices: Named or Anonymous

- 1. Do I want my identifiable information in the system?
 - Yes
 - Enter client's full name, social security number, date of birth
 - No
 - Enter client as anonymous
 - Use an approximate date of birth

Client Choices: To share or not to share

- 2. Do I want to share my data with WC network providers?
 - I want to share all data
 - Client is entered into HMIS on or after 5/21/2014?
 - No visibility adjustments needed
 - Client was in HMIS before 5/21/2014
 - Visibility adjustments required to open new data for sharing
 - I want to share some data
 - Visibility adjustments needed to open or close data for sharing
 - I do not want to share data
 - Visibility adjustments needed to close data if client entered on/after 5/21. If entered before the client record should already be closed.
 - ROI Tab: release granted question is answered “No”

Data Entry Workflow (1 of 6)

1. Check client consent
2. Check client ROI – paper form
3. Search for client
 - Select existing client or add new client
4. Backdate to program entry
5. Complete client profile information
6. Create household (if needed)
 - Complete profile information for all household members

Data Entry Workflow (2 of 6)

7. Adjust visibility to client record (if needed)
 - Client name and social security number only
8. Complete ROIs in Servicepoint
 - a. Include all household members
 - b. Complete one ROI for user provider
 - c. Complete one ROI for each program the client is enrolling in
 - d. Answer “Release Granted” question: Yes/No
 - e. Complete start and end dates

Data Entry Workflow (3 of 6)

9. Complete program entry (Entry/Exit Tab pop-up 1)
 - Emergency shelter programs can skip this step
 - Adjust entry/exit visibility using the padlock if client does not want to share entry/exit record
 - Add deny group to close entry/exit to one or all providers in network

See assessment instructions on next slide

Data Entry Workflow (4 of 6)

10. Complete West Central Assessment and VI-SPDAT sub-assessment (Entry/Exit Tab pop up 2): **New Workflow**
 - Adjust assessment visibility using the padlock if client does not want to share any assessment data
 - Close West Central AND Household data sharing assessment
 - Add deny group to close assessment to one or all providers in network
 - If existing client that DOES want to share data:
 - Open each question on the West Central Assessment that has been previously answered. Add visibility group to open existing answers.
 - Answer required questions for each household member. **SAVE** after each member.
 - Adjust visibility to individual assessment questions if client does not want to share answers to individual questions.

Data Entry Workflow (5 of 6)

11. Select any additional funder specific assessments to complete. Complete for all household members. Save after each.
 - No funder specific assessments should be shared with network providers. No visibility adjustments needed
12. Complete SSOM (FHPAP and LTH only) – Measurements Tab
 - No SSOM data should be shared with network providers. No visibility adjustments needed.

Data Entry Workflow (6 of 6)

13. Record Services (Services Tab)

- ESG-Shelter, ESP, and FHPAP financial services only
- Adjust NEED visibility using the padlock if client does not want to share a service
 - Add deny group to need to close service to one or all providers in network
 - If you want to share a service entered before 5/21 you will need to adjust security.
 - ROI in Servicepoint will need to cover span of service starting from the date of the first service you want to share.

Visibility Groups

- There is a pre-existing list of programs for West Central in the system
 - Select the correct option for the agency to allow or deny sharing as needed for clients requesting more limited sharing
 - See instructions for complete list
 - Providers can be added or removed from this list over time by Wilder as needed.
 - If the provider list is added to or subtracted from, the ROI will need to be updated to match

How to adjust visibility using padlocks

Client Record

- Client Record – Summary Tab
 - Includes Name and Social Security
- Padlock is on the top of the screen – far right side
- To open existing records (created before 5/21/14):
 - “Add Visibility Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT.
 - “Exit”
- To close new or existing records
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit

How to adjust visibility using padlocks

Client Profile

- Client Profile Tab
 - Includes Client Demographics and Universal Profile
- Padlock is on the right of each section
- To open existing records (created before 5/21/14)
 - “Add Visibility Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT.
 - “Exit”
- To close new or existing records
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit

How to adjust visibility using padlocks

Entry/Exit

- Entry Exit Tab
 - Includes program entry/exit date and program provider
- Create the entry in pop-up 1 (Entry data pop-up)
- New clients and new entry/exits will automatically be shared (If ROI is granted)
- If client does not want entry/exit data shared, close on pop-up 2
 - Click the padlock next to the household member name
- To close entry/exit records
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat for any member who does not want to share the entry/exit data

How to adjust visibility using padlocks

West Central Assessment

- Entry Exit Tab – pop up 2
 - Includes list of household members in program and required assessments
- New clients and new information entered in the assessment will automatically have assessment shared (If ROI is granted)
- If a client chooses not to share all assessment data, adjust overall assessment visibility BEFORE you answer assessment questions
 - Click the padlock on the right side of the West Central Assessment
- To close West Central Assessment records
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat for any member who does not want to share assessment data

How to adjust visibility using padlocks

Household Data Sharing Assessment

- Entry Exit Tab – pop up 2
 - Includes list of household members in program and required assessments
- New clients and new information entered in the assessment will automatically have assessment shared (If ROI is granted)
- If a client chooses not to share all assessment data, adjust overall assessment visibility BEFORE you answer assessment questions
 - Click the padlock on the right side of the Household Data Sharing assessment
- To close data in Household Data sharing Assessment records
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat for any member who does not want to share assessment data

How to adjust visibility using padlocks

VI-SPDAT Sub-Assessment

- Entry Exit Tab – pop up 2
 - Includes list of household members in program and required assessments
- New clients and new information entered in the VI-SPDAT assessment will automatically have assessment shared
- Questions must be answered before the visibility can be adjusted. Answer all the questions and save and exit that section.
- Click the edit pencil for the VI-SPDAT sub-assessment
- Click the padlock on the right to close assessment data
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat as necessary for other household members

Client Choices For Individual Questions

The Release of Information form gives clients control over four specific topics on the West Central Assessment. Use this chart to identify which questions to adjust visibility on.

Option on the Release of Information Form	Question to deny on West Central Assessment
If you are homeless	<ol style="list-style-type: none"> 1) Housing status 2) Extent of Homelessness by MN Definition
Military Status	<ol style="list-style-type: none"> 1) Ever served on active duty in the US Armed Forces?
Disability of long-duration status	<ol style="list-style-type: none"> 1) Does client have a disability of long duration
Living situation and housing history	<ol style="list-style-type: none"> 1) Leave any of these (over 3 months ago, up to 6 months ago) 2) Leave any of these? (0 – 3 months ago) 3) Living situation last night (HUD) 4) If other, specify 5) Length of Stay 6) How long since client had a permanent place to live? 7) Zip Code of Last Permanent Address 8) Zip Data quality 9) State (location of prior residence) 10) County of prior residence (MN only) 11) City of prior residence (MN only)
Other	<p>There is a place for the client to list other questions they do not want to share. Find the appropriate element and question and follow the instruction given below</p>

How to adjust visibility using padlocks

Individual Questions – closing data

- It is preferred that this is done on a very limited basis, while still respecting client choice.
- Answer all the questions (demographic or assessment) and save that section
- Go back to the question and click the colored bar
- Click the padlock on the right
- To close question data
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat as necessary for other questions and household members

How to adjust visibility using padlocks

Individual Questions – opening data

- Go to the question and click the colored bar
- Click the padlock on the right
- To open question data for previously answered questions that should now be shared:
 - Select Add Visibility Groups tab
 - “Add Visibility Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- NOTE: ROI dates must start on or before the date of the question you are opening in order for it to be shared.
- Repeat as necessary for other questions and household members
- Answer the remaining questions (demographic or assessment) and save that section

How to adjust visibility Services

- Services Tab (Includes service type, amount, and dates)
- First, create the service(s)
 - New clients and new services for existing clients will automatically have service data shared
- To adjust visibility
 - Click “Back to Dashboard”
 - Click “View all previous service transactions” to get to the Needs tab (should default to here)
 - Click the edit pencil next to the service need then click the padlock on the far right
- To close question data
 - Select Deny Groups tab
 - “Add Deny Group”
 - Search for “spdat” and select West Central Sharing VI-SPDAT
 - Exit
- Repeat for each service as needed

Data Entry Steps – option 1

- Client created in ServicePoint after 5/21/2014 AND chooses to share all data with network providers
 - No visibility adjustments needed
 - Complete ROI in Servicepoint
 - User provider
 - Program provider(s)
- Follow data entry workflow

Data Entry Steps – option 2

- Client is already in Servicepoint as of 5/21/2014 AND chooses to share ALL data with network providers
 - Search for client and click to select
 - Backdate to program entry/service start date
 - Add additional household members if needed using “Manage Household” in Household Tab
 - Open client record padlock to adjust visibility (and each household member)
 - Record ROIs. Release granted “Yes”
 - Adjust visibility using padlocks for each section to open data as you work through the data entry workflow
 - **Client Profile** - **will be set to closed and needs to be opened**
 - **Entry/Exit** - **new entry/exits will be automatically set to share**
 - **West Central Assessment** – **Open visibility to any questions previously answered first.** Then answer remaining questions. New information will be automatically set to share
 - **Services (needs)** - **new services will be automatically set to share**

Data Entry Steps – option 3

- Client is not in HMIS as of 5/21 and does not want to share ANY data with network providers.
 - Search for client and add client
 - Backdate to program entry/service start
 - Add additional household members if needed
 - Close the client record padlock (and for each household member)
 - **Client Record**
 - If client record is closed, all data will be closed
 - Record ROIs (select release granted “No”)
 - Continue through data entry workflow

Data Entry Steps (option 4)

- Client is already in HMIS as of 5/21 and does NOT want to share ANY data with network providers.
 - Search for client and click to select. Backdate to program entry/service start
 - Add additional household members if needed using “Manage Household” in Household Tab
 - If client doesn’t want to share any data, no visibility adjustments need to be made.
 - Record ROIs (select release granted “no”)
 - Continue through data entry workflow

Data Entry Steps (option 5)

- Client is not in HMIS as of 5/21 and only wants to share SOME data with network providers.
 - Search for client and add client
 - Backdate to program entry/service start
 - Add additional household members if needed
 - Record ROIs (select release granted “Yes”)
 - Continue through data entry workflow
 - Adjust visibility using padlocks for each section and question to close data as indicated by the client preference as you work through the data entry workflow
 - **Client Record** – will automatically be set to share, leave as is
 - **Client Profile**
 - **Entry/Exit**
 - **West Central Assessment**
 - **Services (needs)**
- These sections will automatically be open and set to share. Close if client does not want to share with the network. Or adjust if only wants to share with certain providers.

Data Entry Steps (option 6)

- Client is already in HMIS as of 5/21 and only wants to share SOME data with network providers.
 - Search for client and select client
 - Backdate to program entry/service start
 - Add additional household members if needed
 - Record ROIs (select release granted “Yes”)
 - Continue through data entry workflow
 - Adjust visibility using padlocks for each section and question to close data as indicated by the client preference as you work through the data entry workflow
 - **Client Record** – **will be set to closed and needs to be opened**
 - **Client Profile** - **will be set to closed. Open if clients wants to share**
- | | |
|----------------------------------|---|
| • Entry/Exit | New information will be automatically set to share. Open existing items to be shared. |
| • West Central Assessment | Close necessary pieces and/or questions if the client does not want to share all. |
| • Services (needs) | |


Troubleshooting – client not visible

1. I know the client is in here, but I can't see them.
 - a. Call the user from the other agency and ask them to check: What to check:
 - Did the originating agency add West Central Sharing VI-SPDAT to the visibility group?
 - If the client chooses not to share, you will not see this client.

Troubleshooting-see only part of the record

1. If only some of the information is visible/shared
 - a. Did the originating agency complete an ROI in HMIS for the program being shared? Is Release Granted “Yes”
 - b. Am I back dated to a date prior to the effective ROI date?
 1. If yes, shared client data may not be seen
 - c. Am I back dated to a date prior to the client entry date?
 1. If yes, shared client data may not be seen
 - d. Were the assessment questions first answered in the West Central assessment?
 1. If not, they may need to be opened to share with the network. Check the visibility of questions by clicking the colored bar for each, and then the padlock. Add visibility group if needed.
 2. Originating provider may need to make the adjustments.

Troubleshooting – multiple records

1. When I search for the client, I see more than one matching record
 - a. What to check
 - If more than one record was created by your agency ( symbol is present) choose the earliest record. Make sure all information is combined onto chosen record. Delete extra record.
 - Call Wilder for help if needed
 - If records were created by multiple agencies, Call Wilder to merge records.