

HMIS USER GUIDE FOR DHS-OEO THP PROJECTS

TRANSITIONAL HOUSING (TH)

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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. Be 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, 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** and add **SHARED** in the Alias Field.
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.

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 also 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, and then **Save & Continue**.
 - c. If necessary, adjust the **project start date**, then select **Save & Continue**.
4. For each household member included in the entry, complete the data elements on the **MN: THP All-Inclusive** assessment in the **Entry/Exit Date** 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**.

UPDATES ARE REQUIRED 6 MONTHS AFTER ENTRY, OR TWICE YEARLY BEFORE RUNNING THE FISCAL YEAR-END OR CALENDAR YEAR-END REPORTS.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. **Backdate** to the update date (click on Back Date in the top-right corner of the screen).
3. Update the relevant data elements on the **MN: THP All-Inclusive** assessment on the **Assessments tab** of the client record.
 - a. Correct use of **backdate** is crucial to accurate reporting for this step.
 - i. If you are entering updates before the last day of the reporting period, backdating is not necessary.
 - ii. If you are entering updates after the last day of the report period, set backdate to the last day of the reporting period.
 - b. Don't forget to complete updates for each adult household member.
 - c. **Required updates:** Disability Y/N data element, Disabilities sub-assessment.
 - d. **Optional updates:** Income, Non-Cash Benefits, and Health Insurance Y/N data elements and sub-assessments.

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 THP** assessment for each household member.
 - a. For the head of household, be sure to answer **"Was the household asked to leave the program?"**
4. In the **Case Plans** tab, click on **"Add Goal"** for the primary client. (Please see more detailed instructions later in this document!)
 - a. Date Goal was Set = Exit Date
 - b. Classification = Housing
 - c. Type = Maintain Permanent Housing
 - d. Overall Status = Identified
 - e. **Target/Follow-up Date** = 6 months after exit

FOLLOW UP WITH A CLIENT

1. **Follow-ups** are required 6 months after a client exits the program.
 - a. Enter **EDA mode** to the correct provider and open the primary client's record.
 - b. On the **Case Plans** tab, complete the remainder of the **Outcome** fields.

REPORTS FOR DATA QUALITY

Data quality reports are for agencies to use for data cleanup. Never send these reports to the funder. Run data quality reports on a regular basis, at least quarterly. For further information about DHS-OEO THP specific reports, refer to the user guide section titled [Reporting Guidelines](#).

1. In the top right corner of your home screen, click on **Connect to ART**.
2. In ART, you will find the reports for DHS-OEO THP by clicking on:
Public Folder → SSA Report Gallery (Funder Reports) (Secure) → 4. State Homeless Programs → DHS OEO THP
3. Run each of the following reports:
SHP-34-DQR-058 – THP Demographics and Entry Data Check
SHP-34-DQR-164 – THP Exits Data Check
SHP-34-DQR-165 – THP Goals Data Check
SHP-34-DQR-166 – THP Income Data Check

REPORTS TO SUBMIT TO FUNDER

Rely on funder communication for report periods, due dates, or changes to requirements. For further information about DHS-OEO THP specific reports, refer to the user guide section titled [Reporting Guidelines](#).

1. In the top right corner of your home screen, click on **Connect to ART**.
2. In ART, you will find the reports for DHS-OEO THP by clicking on:
Public Folder → SSA Report Gallery (Funder Reports) (Secure) → 4. State Homeless Programs → DHS OEO THP
3. Run each of the following reports:
SHP-34-SAG-016 – THP Income Counting
SHP-34-SAG-057 – THP Demographics and Entry Counting
SHP-34-SAG-162 – THP Exits Counting
SHP-34-SAG-163 – THP Goals Counting
4. **Send reports to funder as PDF email attachments.**

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR OEO THP 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 (MN) 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

<http://hmismn.org/wp-content/uploads/thp-household-entry1.doc>

<http://hmismn.org/wp-content/uploads/thp-household-interim1.doc>

<http://hmismn.org/wp-content/uploads/thp-household-exit1.doc>

INDIVIDUALS

<http://hmismn.org/wp-content/uploads/thp-single-entry1.doc>

<http://hmismn.org/wp-content/uploads/thp-single-interim1.doc>

<http://hmismn.org/wp-content/uploads/thp-single-exit1.doc>

PROGRAM-SPECIFIC DATA ELEMENTS

Program-specific data elements are chosen by your funder and are often unique to the types of projects they fund.

WAS THE HOUSEHOLD ASKED TO LEAVE THE PROGRAM?

Data Collected About: Head of Household

Data Collection Point: Project Exit

Data Collection Instructions: Clients who are exited on or after 7/1/2018 should have this question answered on the Exit Assessment. Record whether the household was asked to leave and if so, provide the reason.

Field	Dependency	Response Category/Data Type
A Was the household asked to leave the program?	None	1 Yes
		2 No
		3 Client doesn’t know
		4 Client refused
		5 Data not collected
B		Non-payment of rent

If yes, what was the reason the household was asked to leave the program?	Field A;	Reached maximum time allowed
	Response 1	Criminal activity / violence
		Non-compliance with program
		Unknown/Disappeared/No Longer Engaging with Program
		Other

ENTERING A HOUSING GOAL AT EXIT

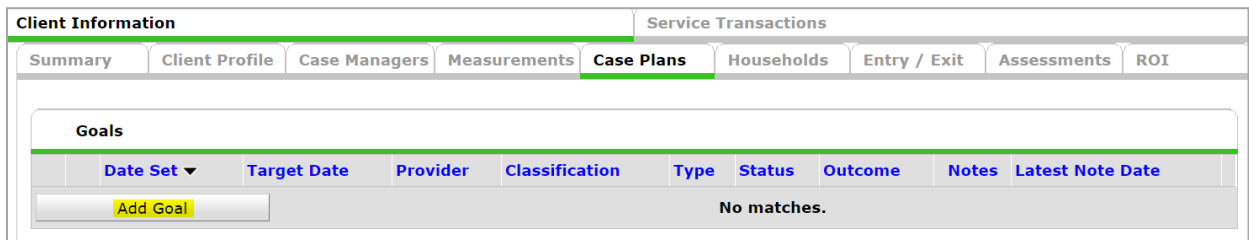
You are required to follow-up with your THP client 6 months after they exit your project to see if they maintained permanent housing (a housing goal of THP). You track this information by creating a “goal” in the Case Plans tab in ServicePoint. Creating a goal allows you to set a housing goal of maintaining permanent housing at exit, and prompts you when it is time to follow-up.

HOW-TO: CREATING A HOUSING GOAL

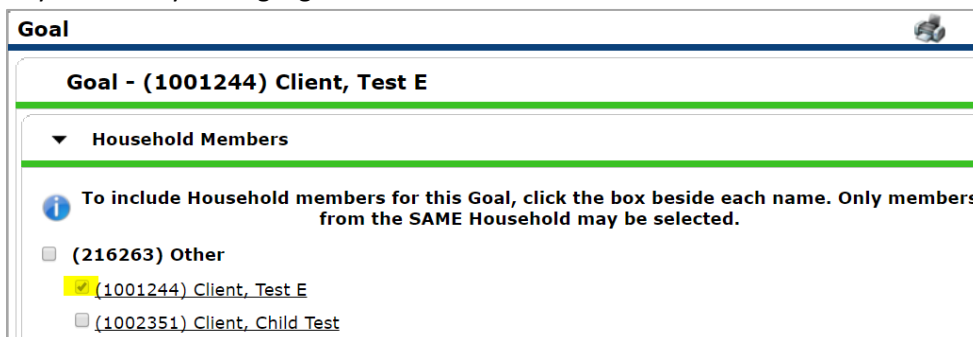
Data Collected About: Required for the Head of Household (including singles and unaccompanied youth)

Data Collection Point: Add the housing goal when a client exits. You are required to follow-up with the client 6 months after exit as well.

1. You should be in EDA mode to the correct provider and in the Head of Household’s record.
2. Before adding a goal, be sure the client has an End Date in the Entry/Exit tab.
3. In the Case Plans tab, click on “Add Goal.”



4. In the Goal pop-up, the head of household should be checked. Uncheck any other household members as you are only adding a goal for the head of household:



5. 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 THP provider, and should match the Entry/Exit. If not, exit the pop-up, enter EDA mode and start over.
- b. **Case Manager (Optional):** This only works if you assigned a Case Managers in the Case Manager tab (uncommon). This will not display on reports.
- c. **Date Goal was Set:** Must match the client’s Exit Date (as entered in the Entry/Exit tab).
- d. **Classification:** Select Housing.
- e. **Type:** Select Maintain Permanent Housing.
- f. **Goal Description (Optional):** You can use this to track notes about the client’s goal. This will not display on reports. To enter general notes not specific to a client goal, use “Notes About Client” section in the Summary tab or the Assessments section.
- g. **Target Date:** Add 6 months to the date you entered for “Date Goal was Set.”
- h. **Overall Status:** Select Identified (or In Progress).
- i. **If Closed, Outcome:** Leave blank, completed at follow-up.
- j. **If Partially Complete, Percent Complete:** Leave blank, completed at follow-up.
- k. **Projected Follow-up Date:** You can use the same date as the Target Date 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.
- l. **Follow-up User* (Optional):** You may use this field to determine among the HMIS Users at your agency whose Home Screen the follow-up reminder will appear on. See the ServicePoint below for more information.
- m. **Follow-up Made:** Leave blank, completed at follow-up.
- n. **Completed Follow Up Date:** Leave blank, completed at follow-up.
- o. **Outcome at Follow Up:** Leave blank, completed at follow-up.

Provider*	Please choose a provider.	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Case Manager	-Select- ▼				
Date Goal was Set	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> <input type="button" value="↻"/>				
Classification*	-Select- ▼				
Type*	-Select- ▼				
Goal Description	<input type="text"/>				
Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> <input type="button" value="↻"/>				
Overall Status	-Select- ▼				
If Closed, Outcome	-Select- ▼	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> <input type="button" value="↻"/>			
If Partially Complete, Percent Complete	-Select- ▼				
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> <input type="button" value="↻"/>				
Follow Up User	Please choose a provider.	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
	-Select- ▼				
Follow Up Made	-Select- ▼				
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> <input type="button" value="↻"/>				
Outcome at Follow Up	-Select- ▼				
					<input type="button" value="Add Goal"/> <input type="button" value="Cancel"/>

6. Click on Add Goal
7. Ignore the new sections that appear at the bottom of the pop-up (Case Notes, Action Steps Planned, and Service Items for this Goal).
8. Click on Save & Exit.

***Tip:** When you enter a Project Follow-up Date and Follow-up User when you create a goal, a prompt will appear on your Home Screen under the Follow-up List dashlet. This will remind an HMIS user to follow-up with clients and will provide the number of days remaining until the Projected Follow-up Date. If overdue, the Time Remaining will say “Past” in red text.

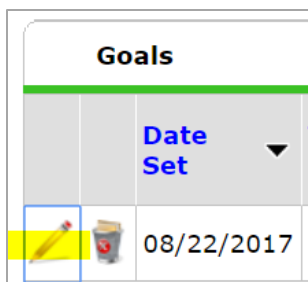
Follow Up List (1)			
Client ID	Type	Date	Time Remaining
776069	Goal	02/22/2018	45 Days

FOLLOWING UP WITH A CLIENT REGARDING THEIR HOUSING GOAL

Follow up on a client’s goal 6 months after they leave your project. Note that attempting to contact a client counts as a follow-up, even if actual contact is not made.

HOW-TO: FOLLOW-UPS

1. Enter EDA mode to the correct provider and open the head of household’s record.
 - a. Tip: If you assigned a Follow-up User when you created the goal, a prompt will appear on that user’s home screen. When that user logs in to HMIS, they can quickly access the goal in the client’s record by clicking on the blue Goal for the client.
2. Backdate to the client’s 6-month follow-up date. (Six months after exit.) This will set the date fields in the case plans section to that follow-up date.
3. In the Case Plans tab, click on the edit pencil at the beginning of the row.



4. Update the following fields:
 - a. **Overall Status:** Change from Identified (or In Progress) to **Closed**.
 - b. **If Closed, Outcome:** Select Outcome
 - c. **Date:** Enter date closed.
 - d. **If Partially Complete, Percent Complete:** Select percentage completed by client so far.

- e. **Follow Up Made:** Select Yes or No (Select Yes even if you attempted to contact the client, but were unable to make contact).
 - f. **Completed Follow Up Date:** Use the same date as the Target Date.
 - g. **Outcome at Follow Up**
5. Click on Save & Exit.

REPORTING GUIDELINES

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

DATA QUALITY REPORTS

Report Names:

- SHP-34-DQR-058 – THP Demographics and Entry Data Check
- SHP-34-DQR-164 – THP Exits Data Check
- SHP-34-DQR-165 – THP Goals Data Check
- SHP-34-DQR-166 – THP Income Data Check

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → 4. State Homeless Programs → DHS OEO THP

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. We recommend that you run them at Excel files, as they are easier to read and navigate. These reports contain client identifying information and should never be sent to your funder.

FUNDER-REQUIRED REPORTS

Report Names:

- SHP-34-SAG-016 – THP Income Counting
- SHP-34-SAG-057 – THP Demographics and Entry Counting
- SHP-34-SAG-162 – THP Exits Counting
- SHP-34-SAG-163 – THP Goals Counting

Location: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → 4. State Homeless Programs
→ DHS OEO THP

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, generally in February and in August.

Submission Instructions: These reports should be saved as PDF files and emailed to funder. Always rely on communication directly from your funder for info on correct report periods, due dates, or changes to requirements.