PBSH Community Extension HMIS Data Entry Workflow

Contents

Purpose

The purpose of this document is to instruct participating programs how to correctly enter data in HMIS ServicePoint for clients who move into a place based supportive housing (PBSH) building, and then move out into a scattered site supportive housing (SSSH) community space.

Place-based service providers may utilize up to three spaces to support individuals who have moved out of the building but are still working with the program to secure housing in the community (scattered site). The pilot program will be 21 months, starting July 1, 2022, and ending March 31, 2024.

There are two ways in which someone may leave the PBSH building and enter the Community Housing space:

- Planned transition from the building
- Unplanned transition from the building

There are several exit pathways from the Community Housing space:

- Graduation (via Housing First Graduates, Affordable Housing, Independence)
- Re-access to previous PBSH building
- Program transfer to:
    - SSSH - client is maintaining housing, however, may require ongoing case management, and/or benefit from scattered-site program that offers more support than existing PBSH program
    - PBSH - client unable to maintain housing in community, however unable to re-access previous PBSH building
    - Other suggested program types as determined appropriate
- Exit (due to other reasons e.g., no contact, client no longer wants services)

Glossary

EDA – Enter Data As: A mechanism in HMIS that allows users to enter and view data from a single program's point of view

PBSH – Place based supportive housing

SSSH – Scattered site supportive housing

Golden Rule of Data Entry – Enter data in HMIS ServicePoint using the sequential order of the tabs. No data should be entered in a tab until all data points in the previous tabs are complete (sequentially).

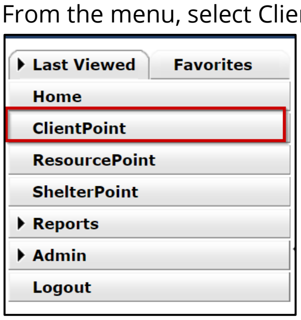
HMIS Steps, Phase 1: Client Moves into PBSH Building

Follow these steps when the client agrees to work with program and moves into the PBSH building.

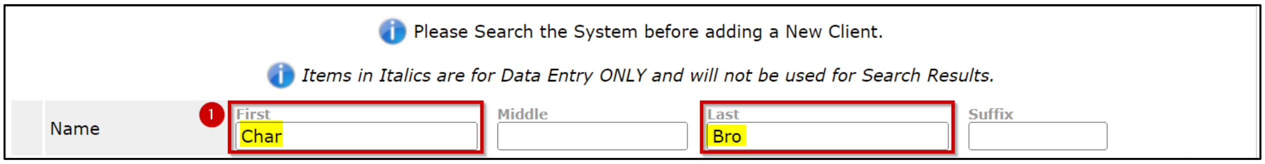
*Always ensure you are EDA'd correctly.

Step 1.1: ClientPoint - Client Profile Tab

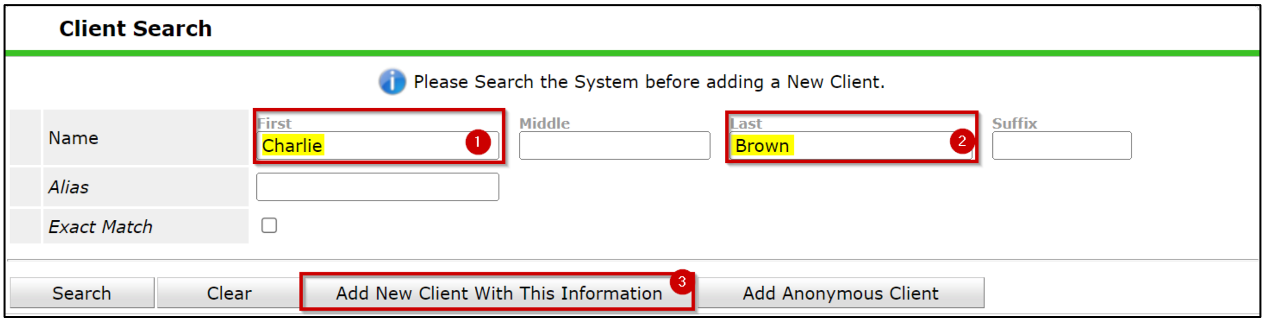
1. From the menu, select ClientPoint.



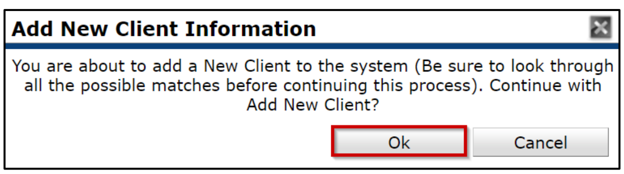
2. Establish if Client Record already exists in HMIS by '**less is more**' search.
    a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist. **If record exists, click on hyperlink to open Client Profile**.)



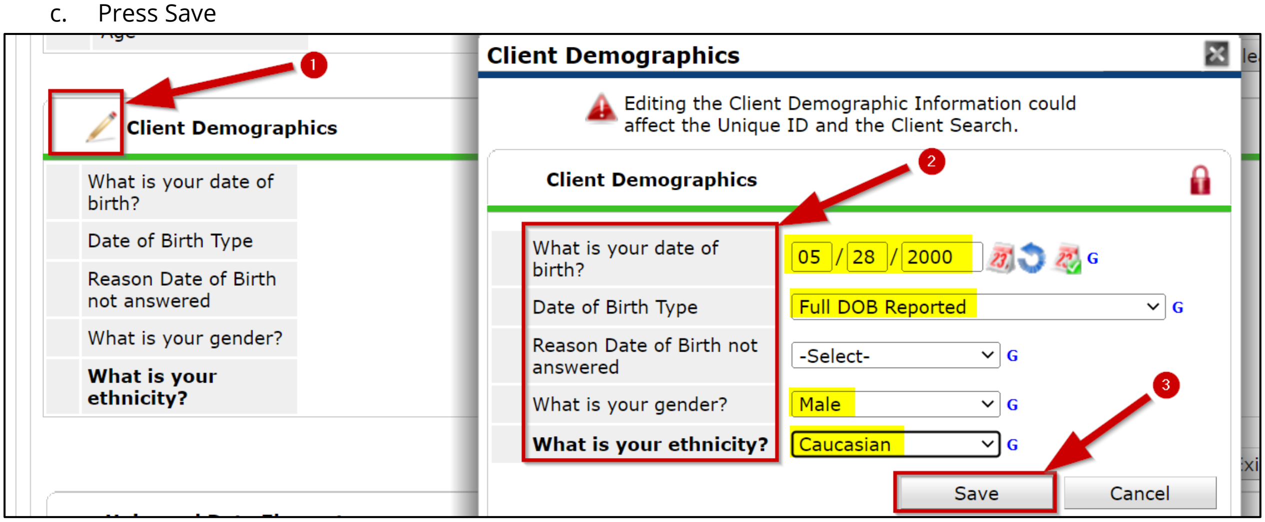
3. IF NEW CLIENT:
    a. Type full name correctly in First & Last Name search fields (do not enter data in other search fields)
    b. Press 'Add New Client With This Information'



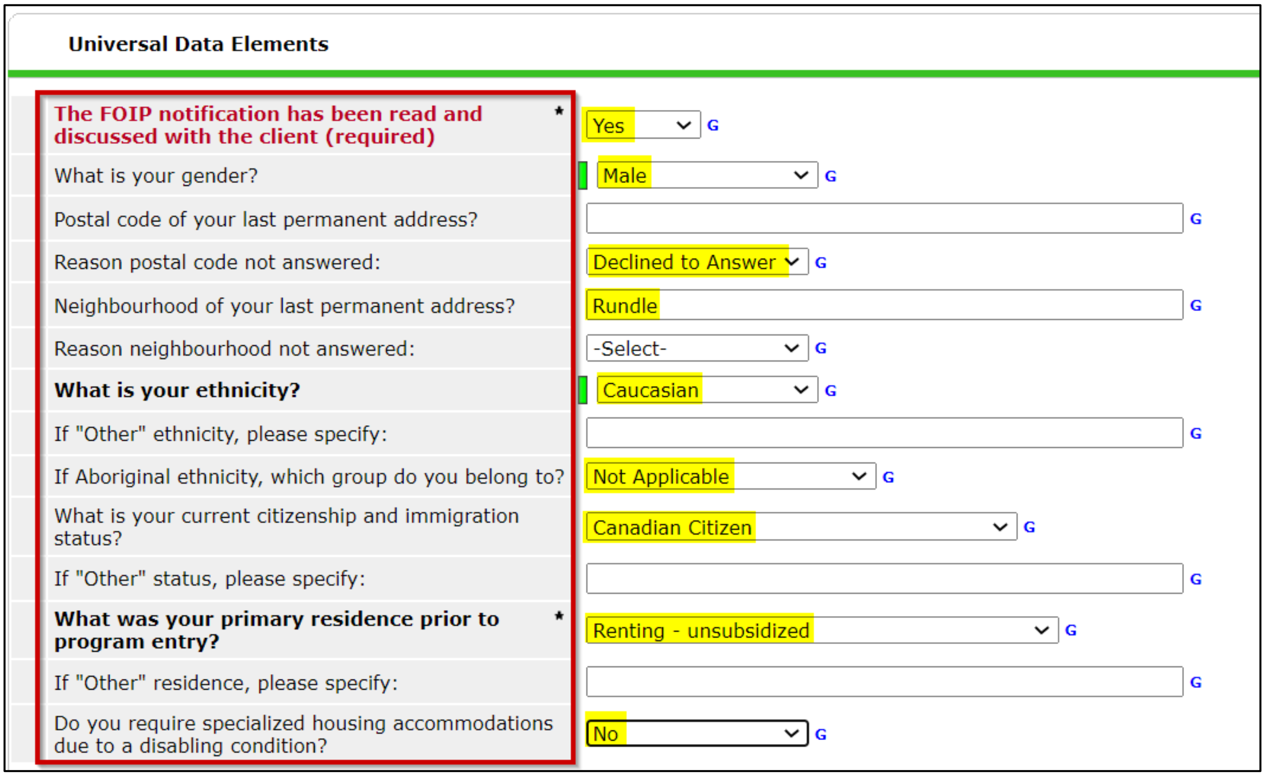
    c. A warning window will pop up reminding you to check the system for duplicate client profiles.
    d. Press 'Ok' to continue.



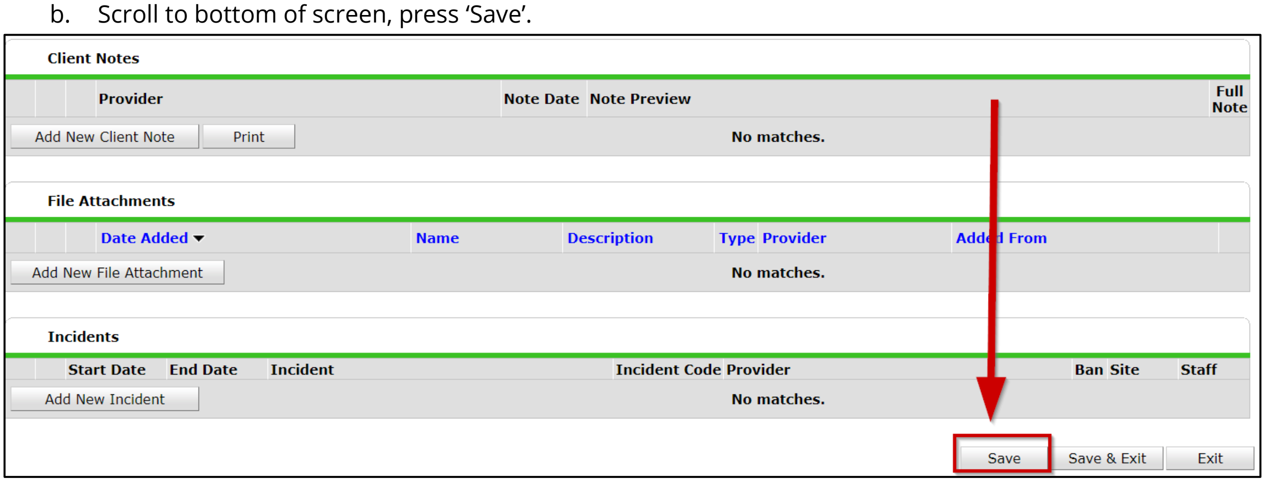
4. Under the Client Profile tab, ensure **Client Demographics** are complete and/or accurate
    a. Click pencil next to 'Client Demographics to edit/update
    b. Answer all pertinent questions
    c. Press Save



5. Under the Client Profile tab, ensure **Universal Data Elements** are complete
    **No data should be entered if FOIP Notification is left unanswered or indicated as 'no'.*
    a. Answer and/or validate all pertinent questions.



b. Scroll to bottom of screen, press 'Save'.



**Once saved, green history bars will appear next to each answer field.*

Step 1.2: ClientPoint - Households Tab (family programs only)

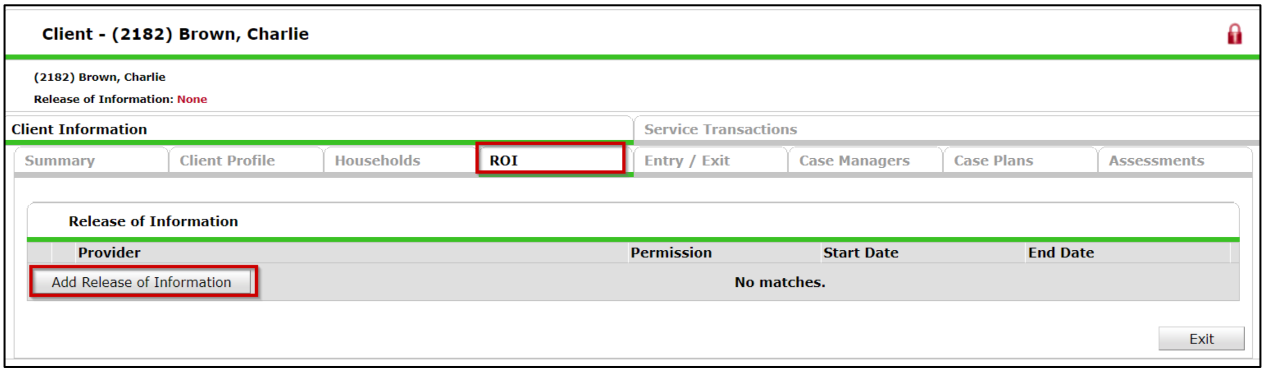
Programs that service youth and/or singles must skip the Households tab. Only those programs servicing families (with dependents) will complete the Households Tab.

**Detailed documentation (with screenshots) for family-serving programs can be found on the HMIS knowledge base.*

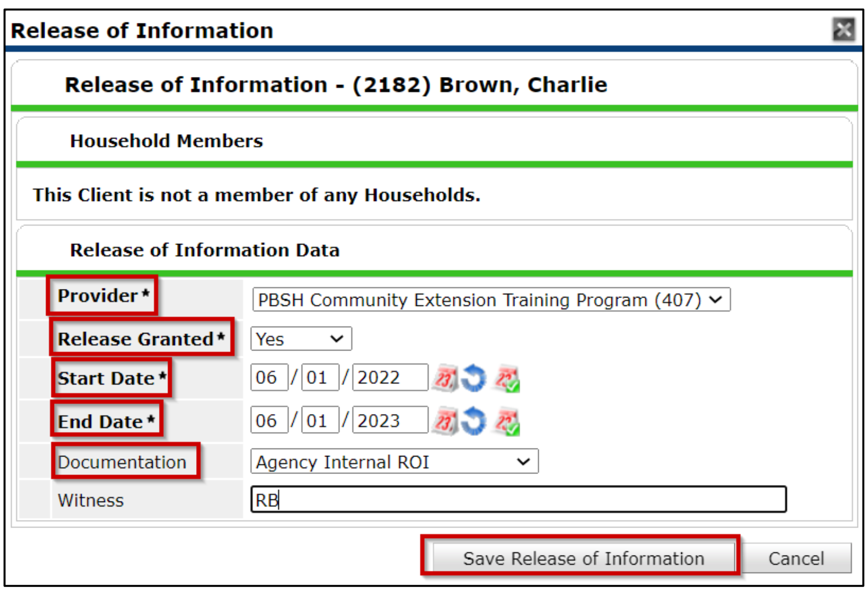
1. Ensure there is only ONE Household.
2. Ensure the Head of Household (HoH) has 'self' indicated under 'Relationship to HoH'.
3. Ensure the 'Relationship to HoH' is complete for remaining Household members.

Step 1.3: ClientPoint - ROI Tab

1. Under the ROI Tab, press 'Add Release of Information'



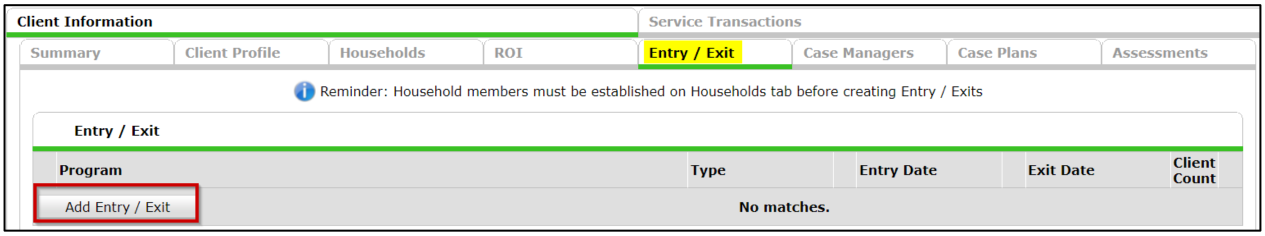
2. Answer pertinent fields:
    a. Ensure Correct Provider
    b. Indicate Yes/No to 'Release Granted'
    c. Enter Start and End Dates for ROI (length is agency dependent)
    d. Documentation: enter 'Agency Internal ROI'
    e. Witness: enter name of witness
    f. Press 'Save Release of Information'



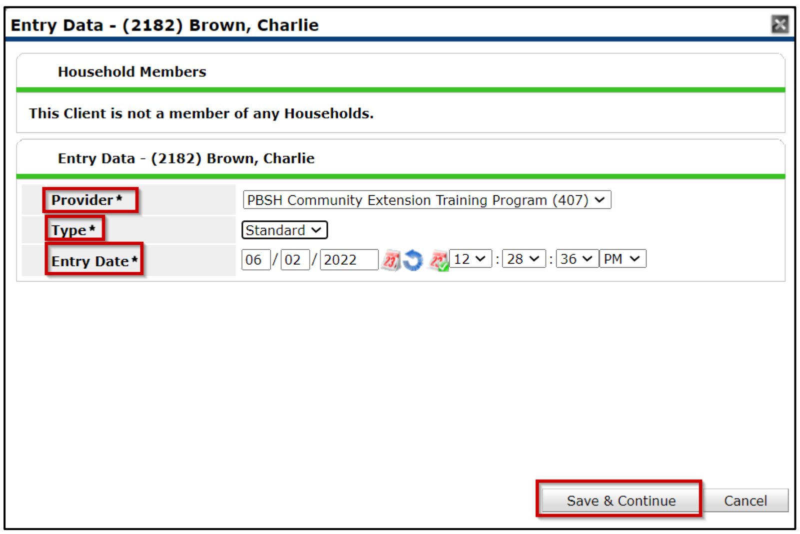
**When ROI is about to expire, add new ROI row rather than editing start/end dates.*

Step 1.4: ClientPoint - Entry/Exit Tab

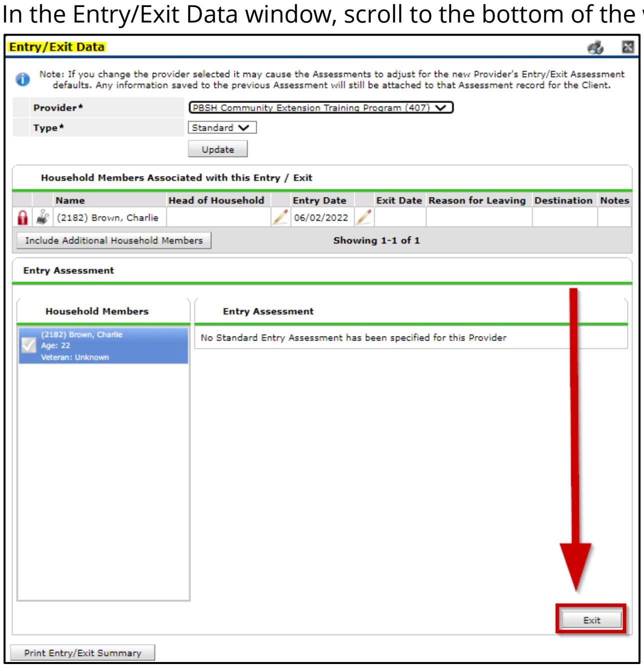
Under the Entry/Exit tab, provide the program entry for the date the client agreed to accept services from program.



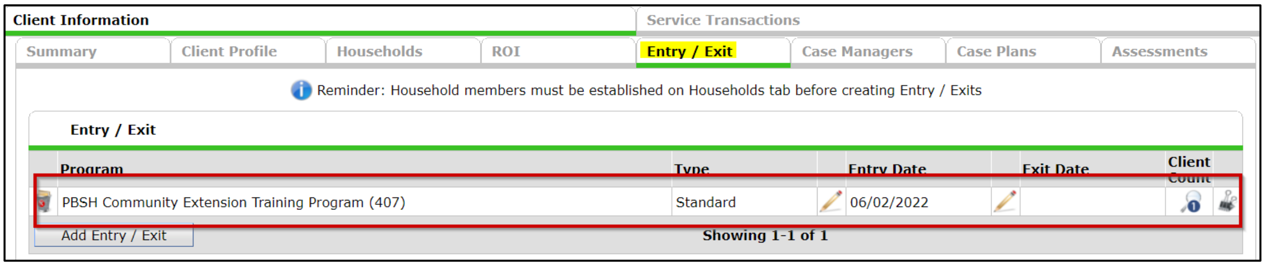
1. Press 'Add Entry/Exit'
    a. Ensure Correct Provider
    b. Indicate Type as 'Standard'
    c. Entry Date will be the date the client agreed to accept services from your program
    **Use backdate tool if you are not entering the data on the actual program entry date*
    d. Press 'Save & Continue'



2. In the Entry/Exit Data window, scroll to the bottom of the window and press 'Exit'



Under the Entry/Exit Tab, there will now be an **active program entry** into your program.



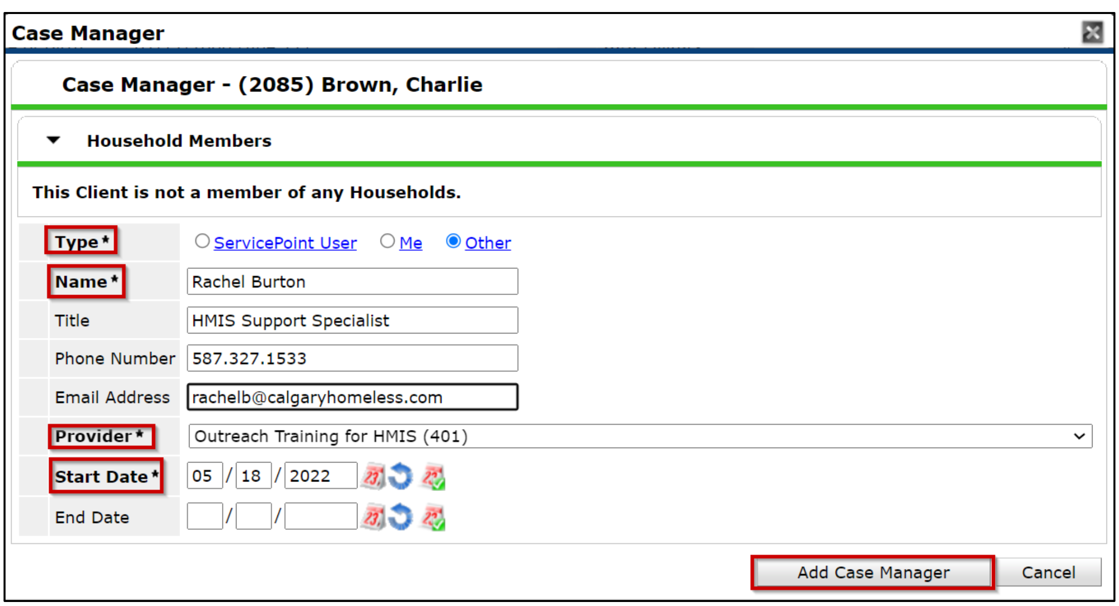
**Active entry is distinguished by an entry date and no exit date*

Step 1.5: ClientPoint - Case Managers Tab

Use of this tab is not mandated by CHF; use per Agency policy.

**Selecting the Case Manager will allow you to add Case Managers in the Case Plans Tab.*

1. Under the Case Managers Tab, press 'Add Case Manager'
2. There are 3 ways to assign a case manager. Use method that works best for you:
    a. Select 'ServicePoint User'.
        i. Next to 'Select User', ensure provider is correct, and then below will be a list of all HMIS users with your provider
        ii. Select appropriate individual from list
    b. Select 'Me'
        i. This will auto-populate based on the information entered in your HMIS User Profile
    c. Select 'Other'
        i. This allows you to manually type in the information
3. Update additional information as needed
4. Ensure Provider is correct
5. Indicate Start Date the Case Manager took client on case load
    a. IF there is an end date (eg. for parental leave), it may be entered in the End Date field
6. Press 'Add Case Manager'



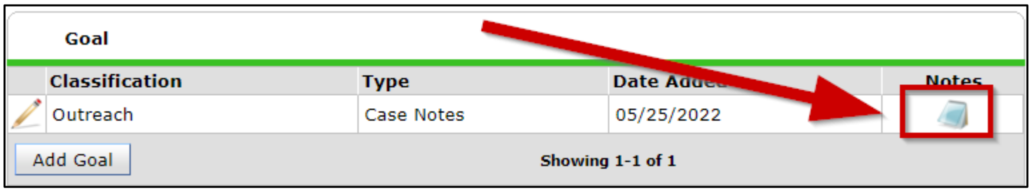
**Bold fields with asterisks are mandatory when adding a Case Manager*
***Adding a Case Manager is not mandatory, but is highly recommended*

Step 1.6: ClientPoint - Case Plans Tab

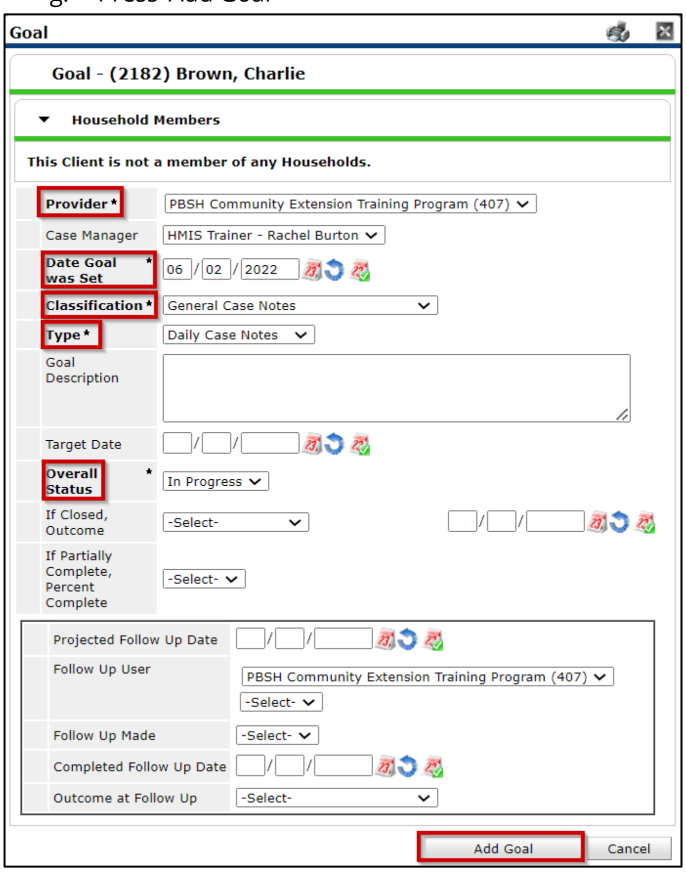
Use of this tab is not mandated by CHF; use per Agency policy.

If the goal/folder already exists, please do not create a new one. Simply click on the note pad to add a new note.

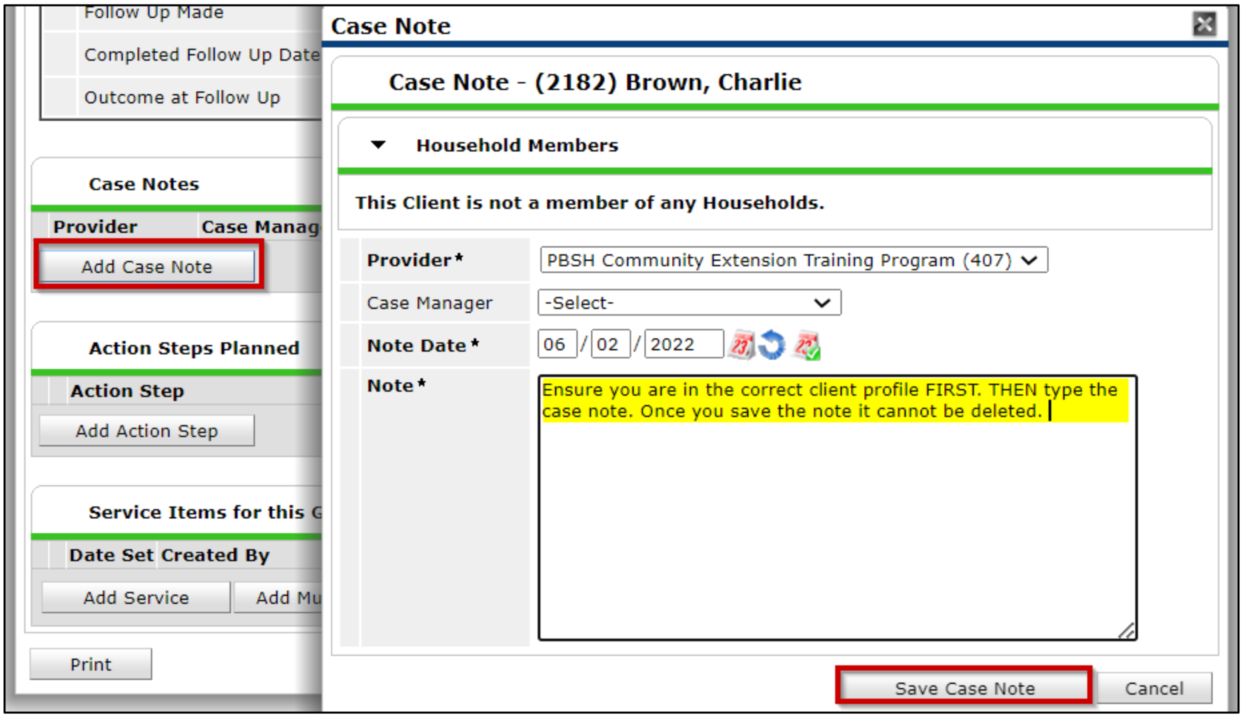
***Note:** Only add notes to goals created by your provider



1. To create a NEW goal/folder, under the Case Plans Tab, press 'Add Goal'
   a. Ensure Provider is correct
   b. If applicable, select case manager
   c. Indicate date the Goal was set (in other words, the date the folder was created).
   d. Select appropriate Classification
   e. Select appropriate Type
   f. Indicate applicable Overall Status
   g. Press 'Add Goal'



6. Press 'Add Case Note' to begin adding case notes to the Goal/Folder.
7. Type the case note.
8. Press 'Save Case Note'.

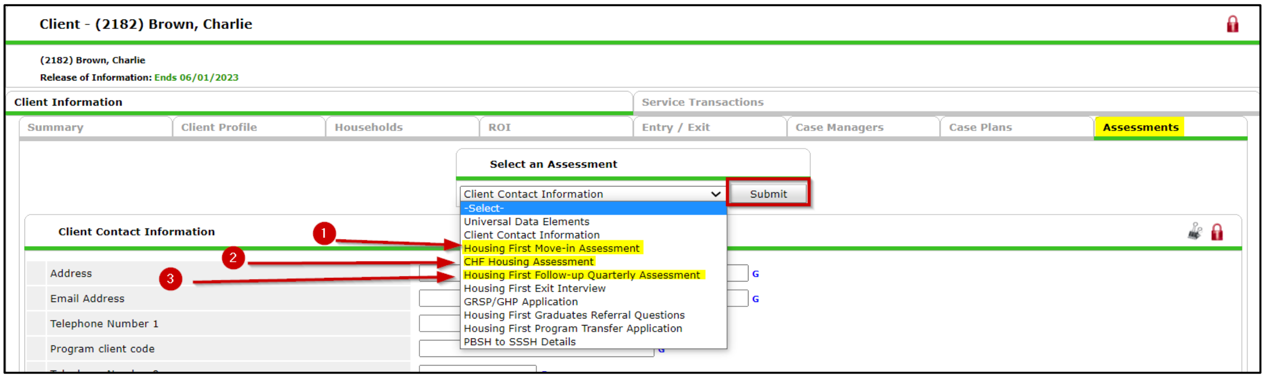


*Ensure you are in the correct client's profile before saving the case note. Case notes cannot be deleted. If you save the case note to the wrong client profile, make an amendment note in the goal/folder impacted, and then email the HMIS Team (hmis@calgaryhomeless.com)

Step 1.7: ClientPoint - Assessments Tab

1. Under the Assessments tab, complete the **Housing First Move in Assessment**
   a. The data entry of this assessment should reflect the actual date the client physically moved into their unit. Please use the backdate tool if applicable.
2. Under the Assessments tab, complete the **CHF Housing Assessment**
   a. The data entry of this assessment should reflect the actual date the client physically moved into their unit. Please use the backdate tool if applicable.
3. Every three months following the date of move-in, complete the **Housing First Quarterly Assessment**.
   a. The data entry for this assessment should be completed to reflect the month the assessment is due (every 3 months). Please use the backdate tool if applicable.

To select the appropriate assessment, highlight it from the drop-down menu and press 'Submit'.

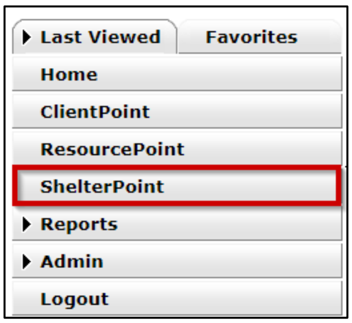


Step 1.8: ClientPoint - Service Transactions Tab

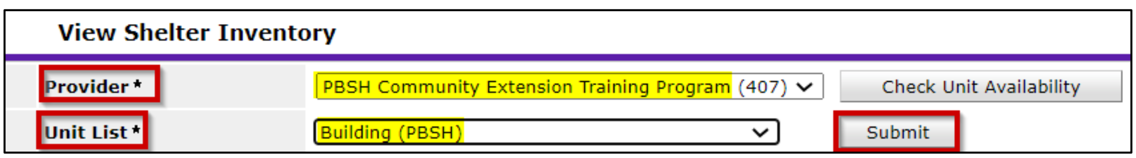
Use of this tab is custom to each agency. Use per agency policy.

Step 1.9: ShelterPoint – Check In [to Building (PBSH)]

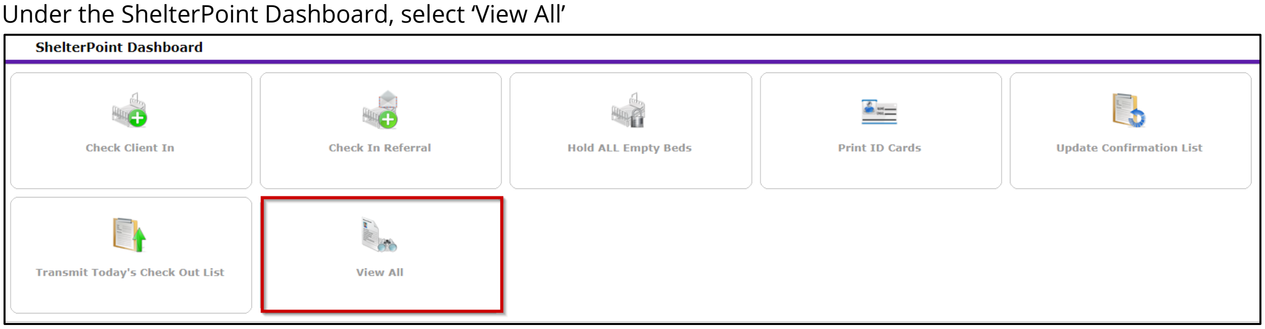
1. From the menu, select ShelterPoint



2. Ensure the provider is correct (you will see the program you are EDA'd as)
3. Select the appropriate Unit List:
   a. Building (PBSH)
      **You will see the name of the actual building*
   b. Press 'Submit'

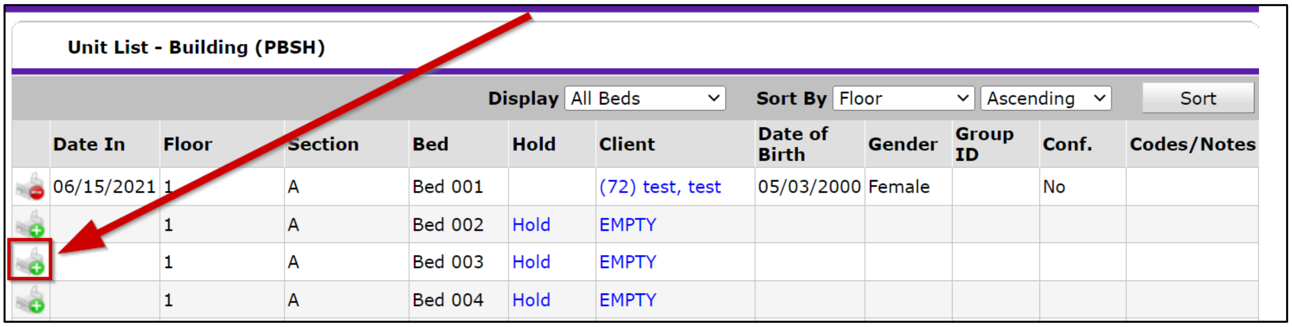


4. Under the ShelterPoint Dashboard, select 'View All'



The Shelter Inventory Information screen will populate. This view is customizable per program and may look different than the screenshot below.

5. Press the 'Check In' button to select the appropriate 'spot' you would like to check the client into

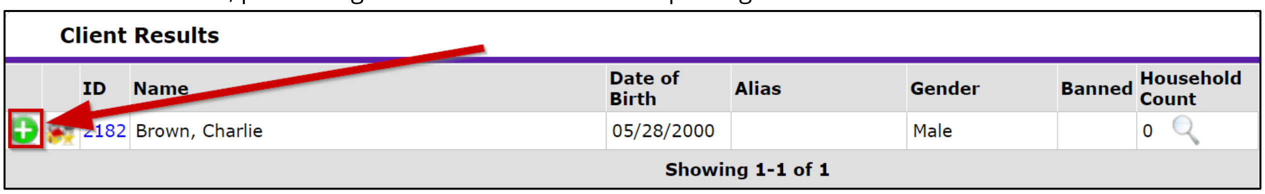


Unit List - Building (PBSH)

Display All Beds | Sort By Floor | Ascending | Sort

	Date In	Floor	Section	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	06/15/2021	1	A	Bed 001		(72) test, test	05/03/2000	Female		No	
		1	A	Bed 002	Hold	EMPTY					
		1	A	Bed 003	Hold	EMPTY					
		1	A	Bed 004	Hold	EMPTY					

6. In the Client Search screen, perform less is more search to pull up client's profile
7. Under Client Results, press the green button with the white plus sign



Client Results

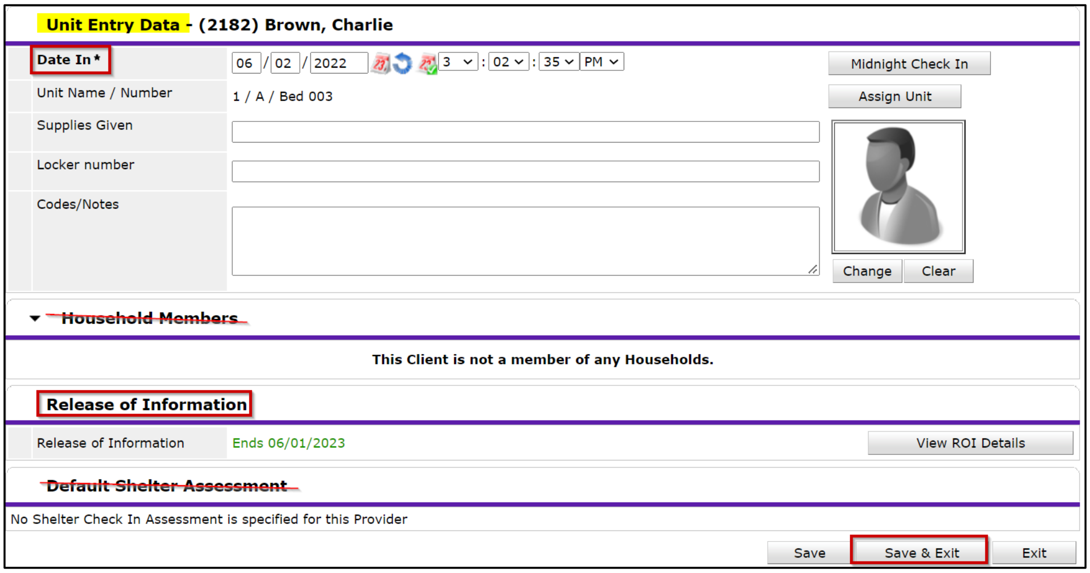
		ID	Name	Date of Birth	Alias	Gender	Banned	Household Count
		2182	Brown, Charlie	05/28/2000		Male		0

Showing 1-1 of 1

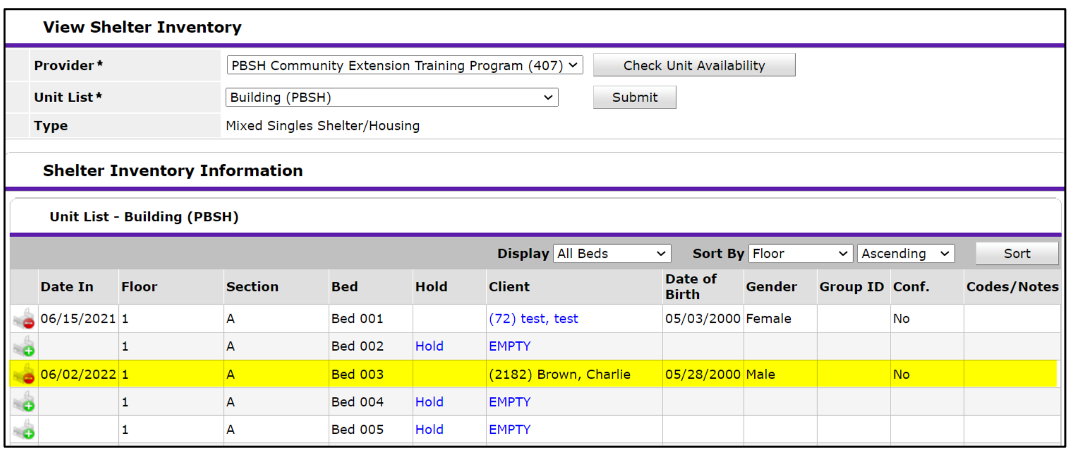
8. Under the Unit Entry Data section, ensure the 'Date In' reflects the date the client agreed to accept services from the program (this will be the same date as the Program Entry date under the Entry/Exit Tab).

***NOTE:** *You cannot not use the backdate tool in ShelterPoint. If you need to enter a previous date for the 'Date In' field, manually type the correct date in the field (use American format: month/day/year).*

9. Skip the Household Members section
10. Ensure there is a valid ROI in the Release of Information section. If the ROI needs to be updated, update it from ClientPoint under the ROI Tab (see steps 1.3)
11. Skip Default Shelter Assessment
12. Press 'Save & Exit'



The client will now appear checked into that spot:



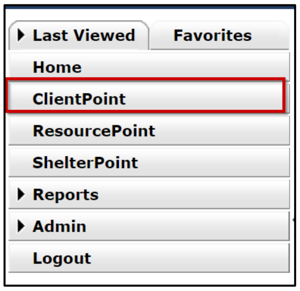
HMIS Steps, Phase 2: Client Moves Out of PBSH Building into SSSH Community Space

Follow these steps when the client moves out of the PBSH building into the SSSH Community Space.

*Always ensure you are EDA'd correctly.

Step 2.1: ClientPoint - Assessments Tab

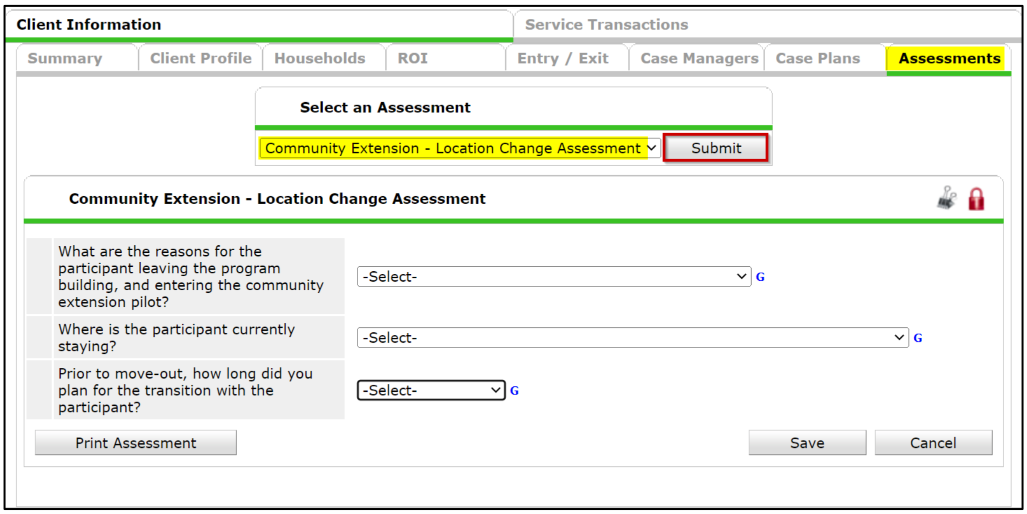
1. From the menu, select ClientPoint.



2. Open Client Profile (using less is more search)
3. Under the Assessment Tab, complete the **Community Extension – Location Change Assessment**

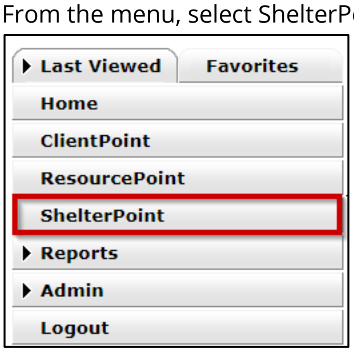
   DO NOT PROVIDE PROGRAM EXIT (under Entry/Exit Tab)

   *****DO NOT COMPLETE HOUSING FIRST EXIT INTERVIEW***

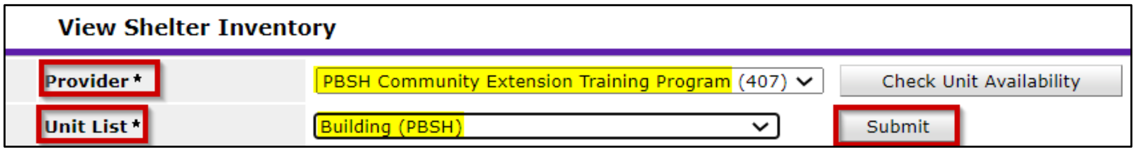


Step 2.2: ShelterPoint – Check Out [of Building (PBSH)]

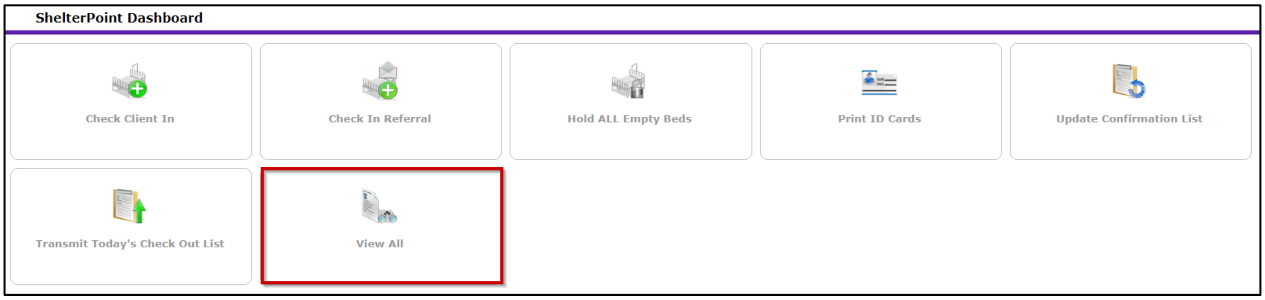
1. From the menu, select ShelterPoint



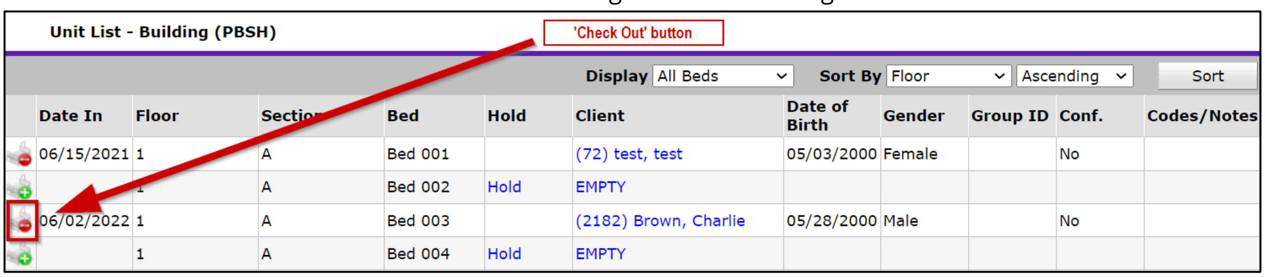
2. Ensure the provider is correct (you will see the program you are EDA'd as)
3. Select the appropriate Unit List:
   a. Building (PBSH)
   b. Press 'Submit'



4. Under the ShelterPoint Dashboard, select 'View All'



5. Press the 'Check Out' button of the client who is moving out of the building

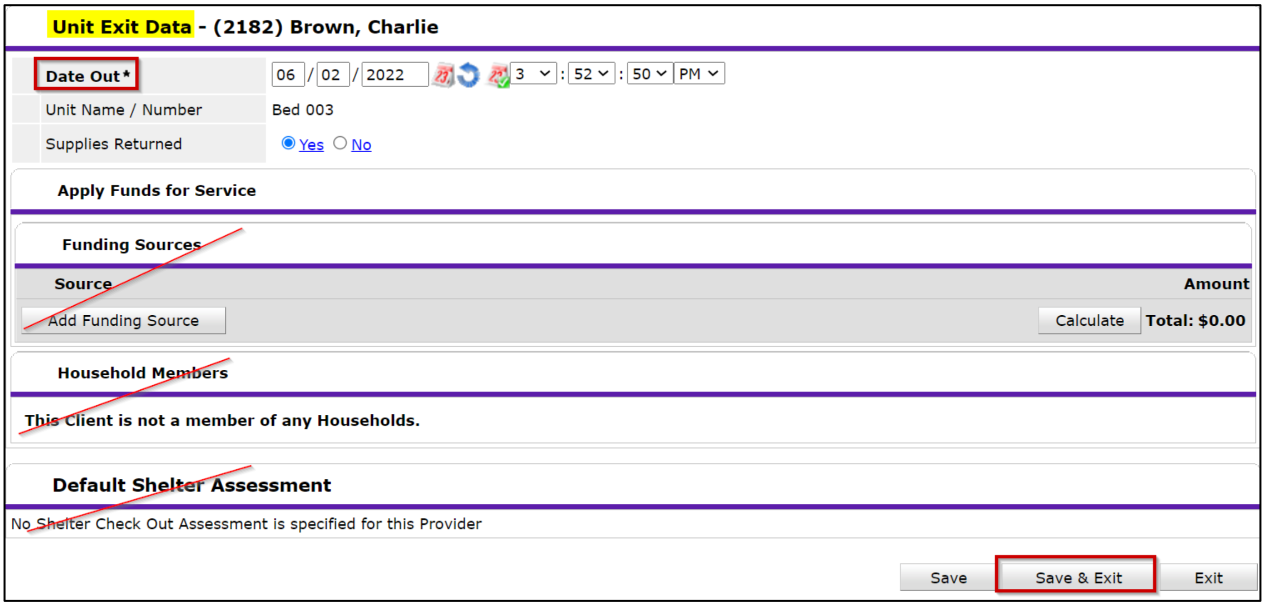


Date In	Floor	Section	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
06/15/2021	1	A	Bed 001		(72) test, test	05/03/2000	Female		No	
	1	A	Bed 002	Hold	EMPTY					
06/02/2022	1	A	Bed 003		(2182) Brown, Charlie	05/28/2000	Male		No	
	1	A	Bed 004	Hold	EMPTY					

6. Under the Unit Exit Data section, ensure the 'Date Out' reflects the date the client moves out of the building.

***NOTE:** *You cannot not use the backdate tool in ShelterPoint. If you need to enter a previous date for the 'Date Out' field, manually type the correct date in the field (use American format: month/day/year).*

7. Skip the Funding Sources section
8. Skip the Household Members section
9. Skip the Default Shelter Assessment section
10. Press 'Save & Exit'

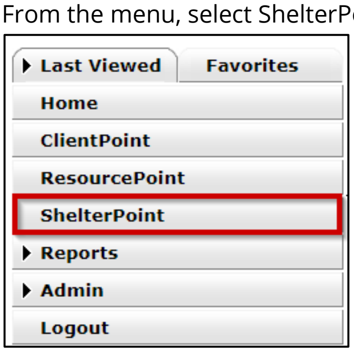


The client is now checked out of the building. **Immediately check the client into the SSSH Community spot by following Step 2.3: ShelterPoint Check In to Community Extension (SSSH) Space.**

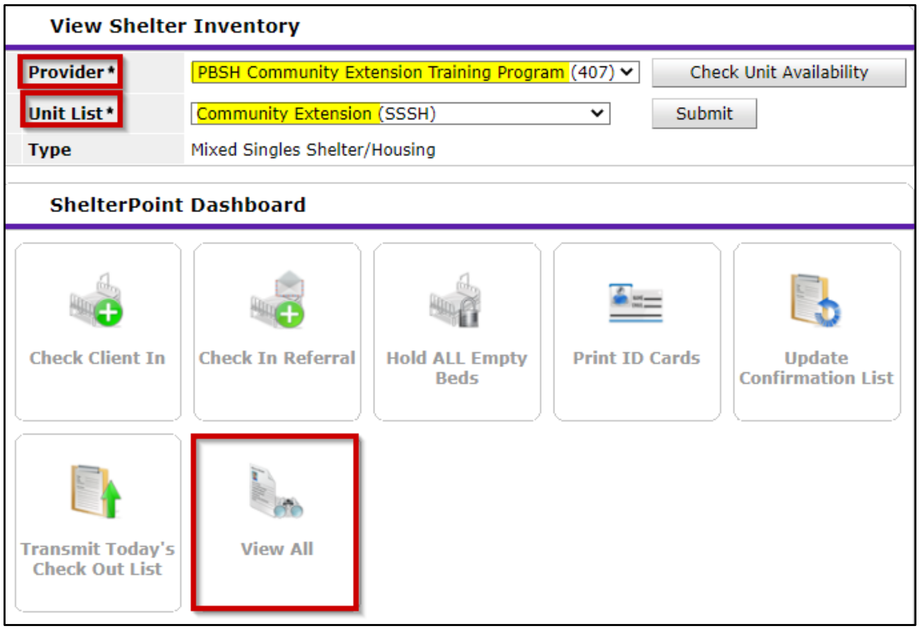
Step 2.3: ShelterPoint – Check In [to Community Extension (SSSH)]

As soon as the checkout from the Building (PBSH) Unit List is complete, check the client in to the Community Extension (SSSH) Unit List, regardless if the client has moved into the new unit or not. In other words, **if the client is active with the program, they must appear in one of the two ShelterPoint unit lists.**

1. From the menu, select ShelterPoint

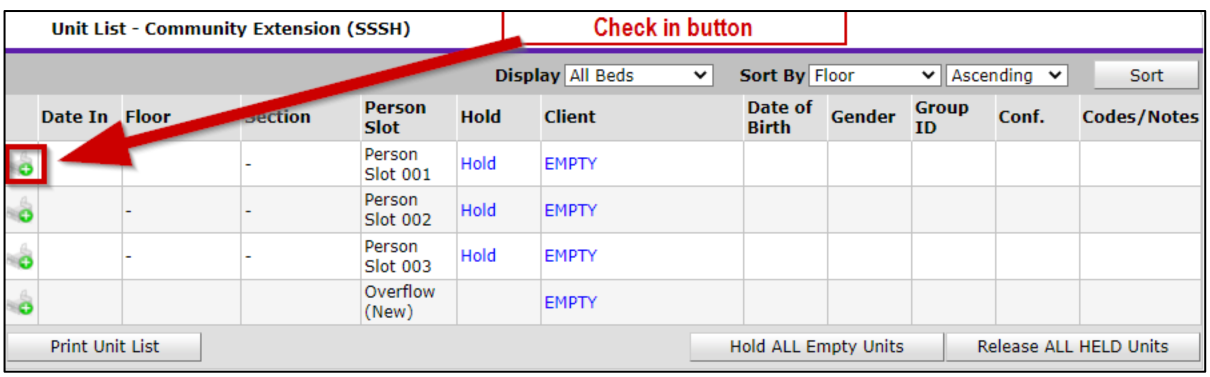


2. Ensure the provider is correct (you will see the program you are EDA'd as)
3. Select the appropriate Unit List:
   a. Community Extension (SSSH)
   b. Press 'Submit'
4. Under the ShelterPoint Dashboard, select 'View All'



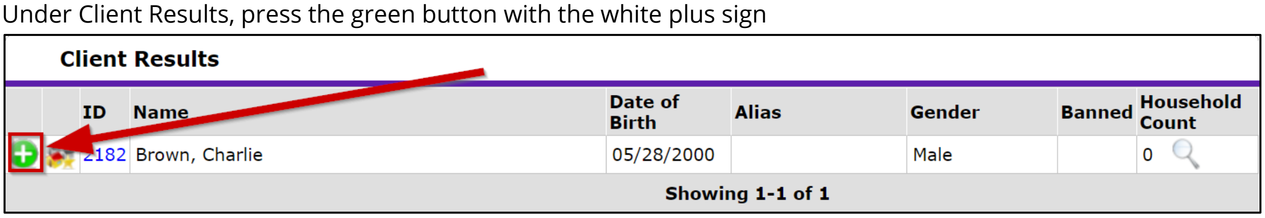
The Shelter Inventory Information screen will populate. This view is customizable per program and may look different than the screenshot below.

5. Press the 'Check In' button to select the appropriate 'spot' you would like to check the client into



	Date In	Floor	Section	Person Slot	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
			-	Person Slot 001	Hold	EMPTY					
		-	-	Person Slot 002	Hold	EMPTY					
		-	-	Person Slot 003	Hold	EMPTY					
				Overflow (New)		EMPTY					

6. In the Client Search screen, perform less is more search to pull up client's profile
7. Under Client Results, press the green button with the white plus sign



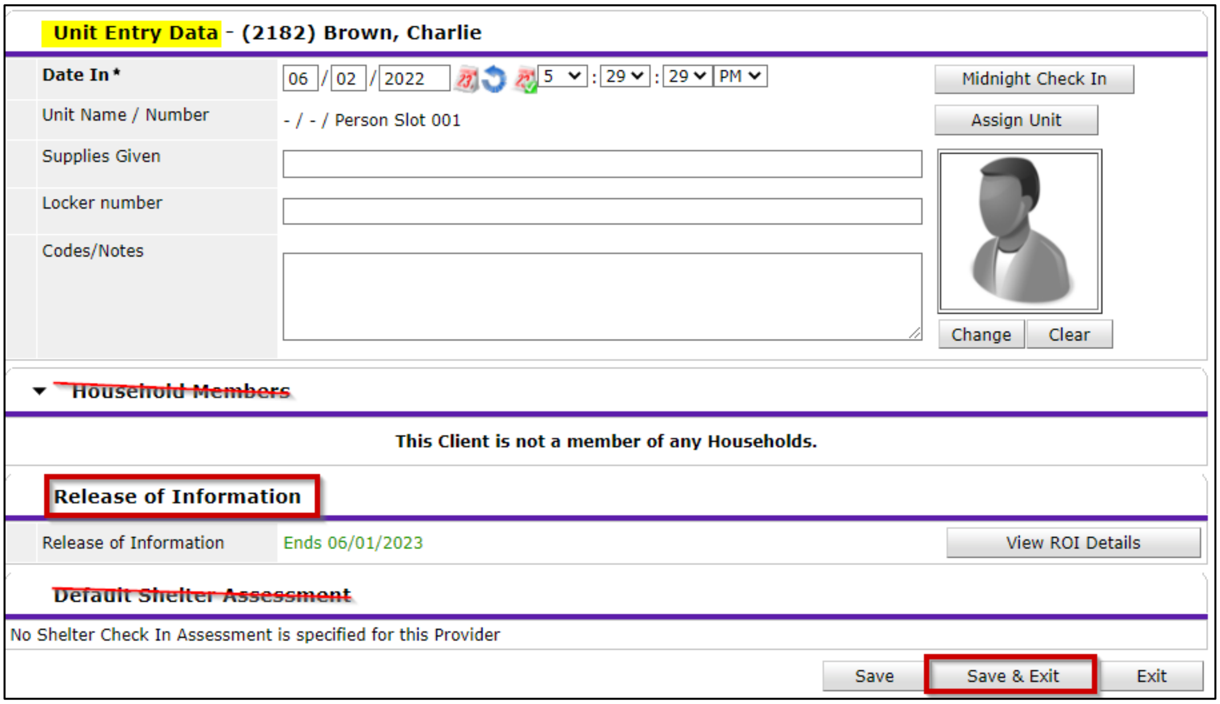
		ID	Name	Date of Birth	Alias	Gender	Banned	Household Count
		2182	Brown, Charlie	05/28/2000		Male		0

8. Under the Unit Entry Data section, ensure the 'Date In' reflects the date the client moved out of the PBSH Building

***NOTE:** *You cannot not use the backdate tool in ShelterPoint. If you need to enter a previous date for the 'Date In' field, manually type the correct date in the field (use American format: month/day/year).*

9. Skip the Household Members section

10. Ensure there is a valid ROI in the Release of Information section. If the ROI needs to be updated, update it from ClientPoint under the ROI Tab (see steps 1.3)
11. Skip Default Shelter Assessment
12. Press 'Save & Exit'



Unit Entry Data - (2182) Brown, Charlie

Date In * 06 / 02 / 2022 5 : 29 : 29 PM — Midnight Check In
Unit Name / Number: - / - / Person Slot 001 — Assign Unit
Supplies Given
Locker number
Codes/Notes
Change Clear

~~Household Members~~

This Client is not a member of any Households.

Release of Information

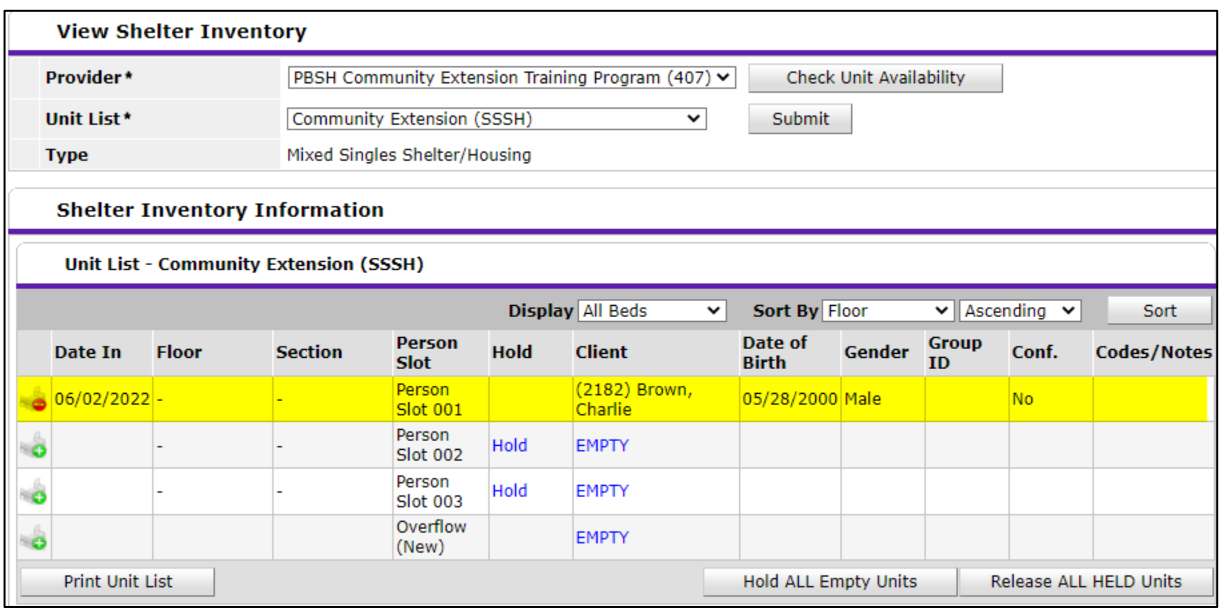
Release of Information: Ends 06/01/2023 — View ROI Details

~~Default Shelter Assessment~~

No Shelter Check In Assessment is specified for this Provider

Save | Save & Exit | Exit

The client will now appear checked into that spot:



View Shelter Inventory

Provider *: PBSH Community Extension Training Program (407) — Check Unit Availability
Unit List *: Community Extension (SSSH) — Submit
Type: Mixed Singles Shelter/Housing

Shelter Inventory Information

Unit List - Community Extension (SSSH)

Display: All Beds | Sort By: Floor | Ascending | Sort

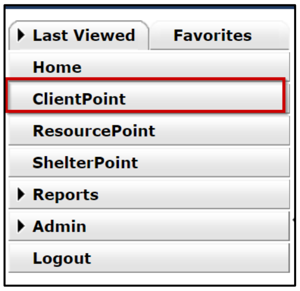
Date In	Floor	Section	Person Slot	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
06/02/2022	-	-	Person Slot 001		(2182) Brown, Charlie	05/28/2000	Male		No	
	-	-	Person Slot 002	Hold	EMPTY					
	-	-	Person Slot 003	Hold	EMPTY					
			Overflow (New)		EMPTY					

Print Unit List | Hold ALL Empty Units | Release ALL HELD Units

Step 2.4: ClientPoint – Assessments Tab

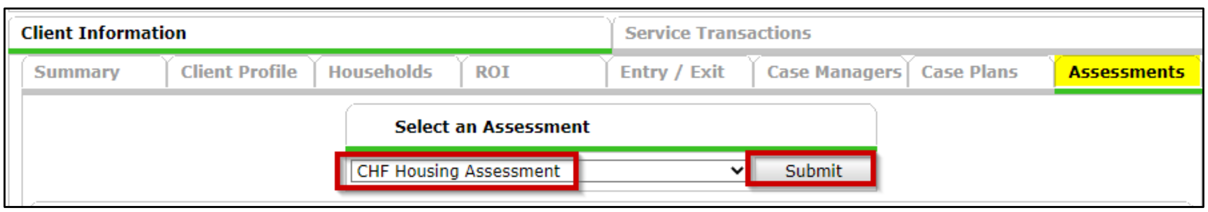
Once the Client has moved into the scattered site unit, the CHF Housing Assessment must be completed.

1. From the menu, select ClientPoint.



2. Open Client Profile (using less is more search)
3. Under the Assessment Tab, complete the CHF Housing Assessment
    a. The data entry of this assessment should reflect the actual date the client physically moved into their unit. Please use the backdate tool if applicable.
        i. In the Date of Assessment timeframe/sub-assessment, indicate ‘Re-Housed Housing Assessment’
        ii. In the ‘Reason for Housing’ field, be sure to select ‘Rehousing due to…’ whatever the circumstances may be

    ****DO NOT COMPLETE THE HOUSING FIRST MOVE IN ASSESSMENT***



4. Every three months following the (original) date of move-in (to the PBSH Building), complete the **Housing First Quarterly Assessment**.
    a. The data entry for this assessment should be completed to reflect the month the assessment is due (every 3 months). Please use the backdate tool if applicable.

To select the appropriate assessment, highlight it from the drop-down menu and press ‘Submit’.

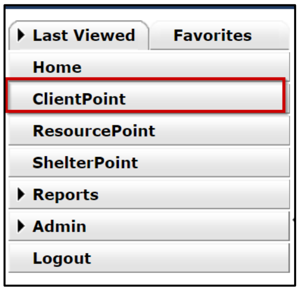
HMIS Steps, Phase 3: Client Exits Program

Follow the below steps when the client is exiting the program.

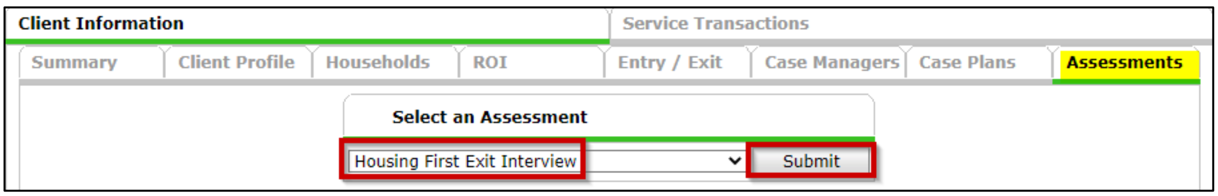
*Always ensure you are EDA’d correctly.

Step 3.1: ClientPoint - Assessment Tab

1. From the menu, select ClientPoint.

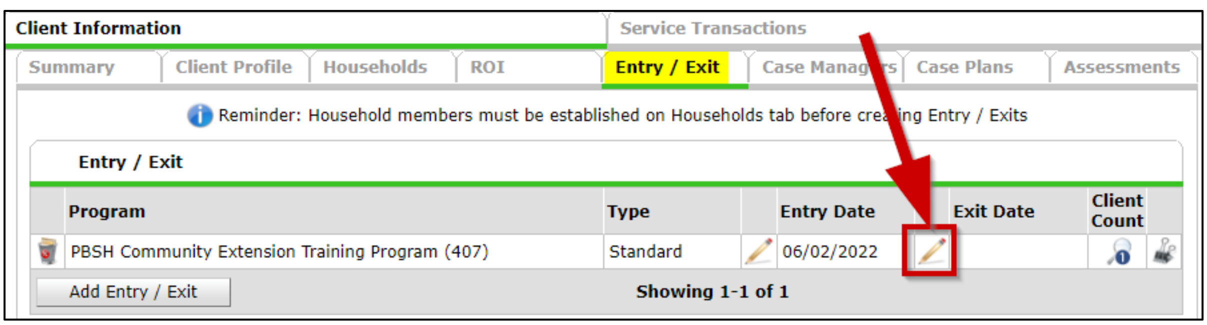


2. Open Client Profile (using less is more search)
3. Under the Assessment Tab, complete the Housing First Exit Interview
    a. The data entry of this assessment should reflect the actual date the client exits the program. Please use the backdate tool if applicable.

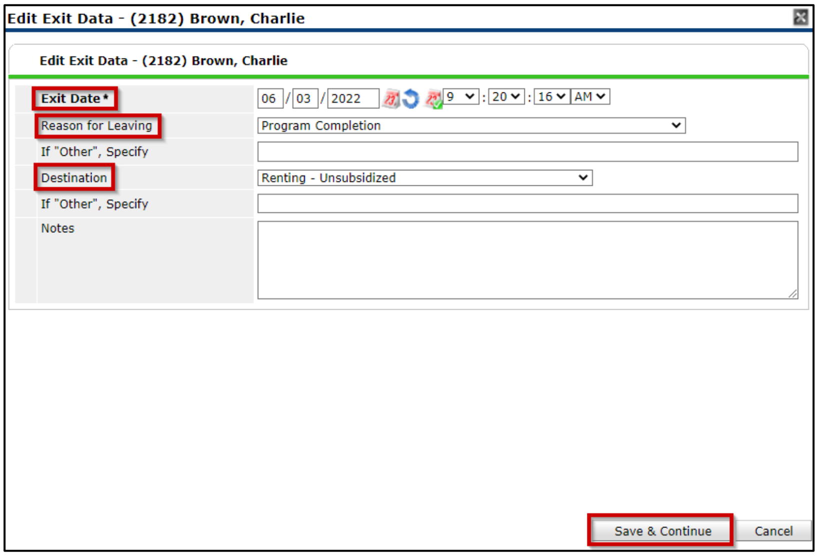


Step 3.2: ClientPoint – Entry/Exit Tab

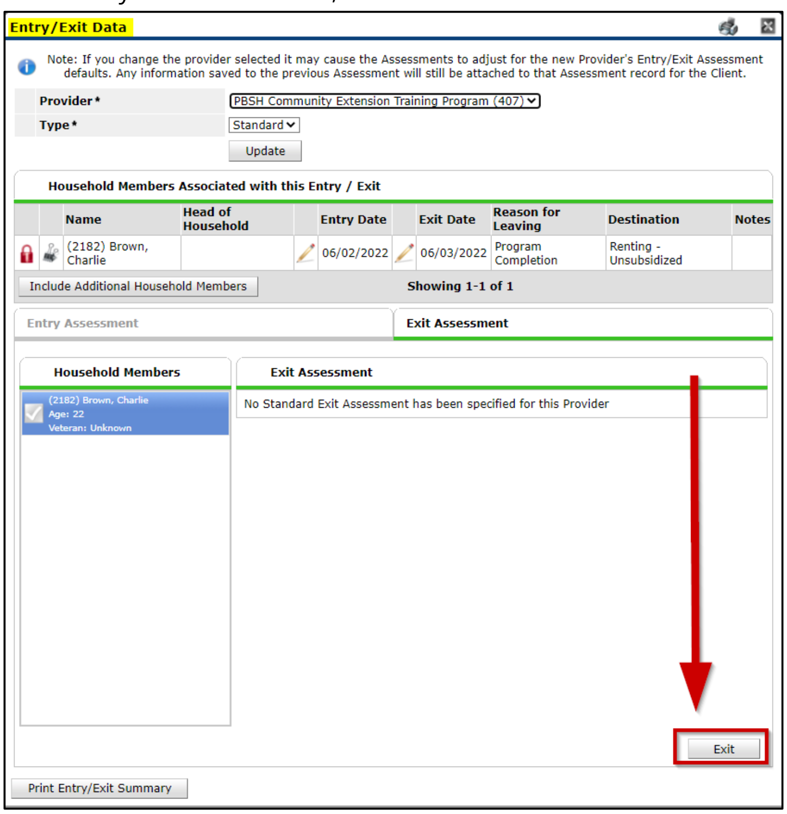
Under the Entry/Exit tab, provide the program exit date to reflect the date the client no longer receives services from the program.



1. Press the pencil next to the Exit Date
    a. Ensure the date reflects the date the client exited the program.
    Use backdate tool if you are not entering the data on the actual program exit date
    b. Indicate the Reason for Leaving
    c. Indicate the Destination
    d. Press Save & Continue

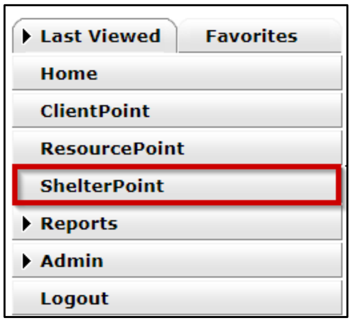


2. In the Entry/Exit Data window, scroll to the bottom of the window and press 'Exit'

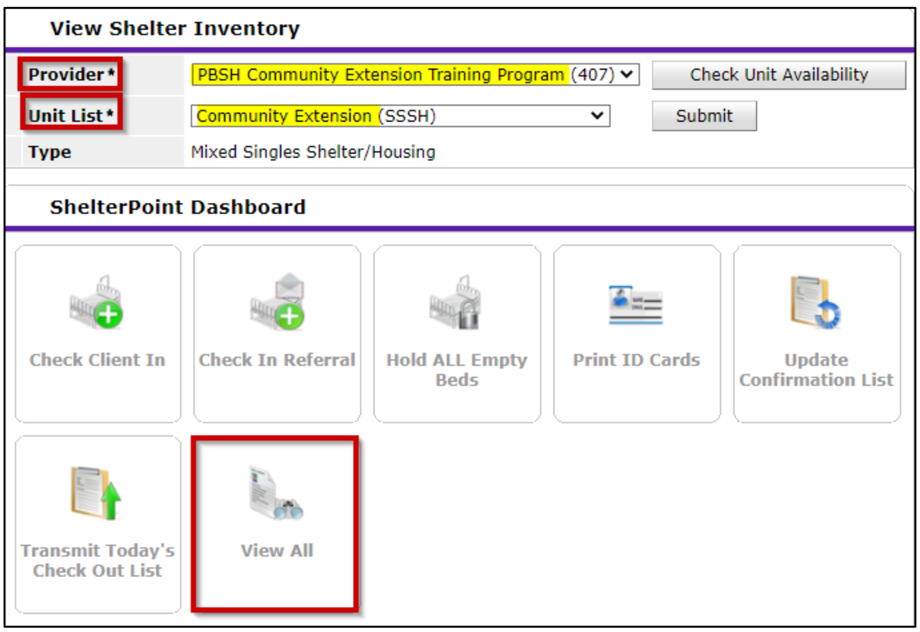


Step 3.3: ShelterPoint – Check Out [of Community Extension (SSSH)]

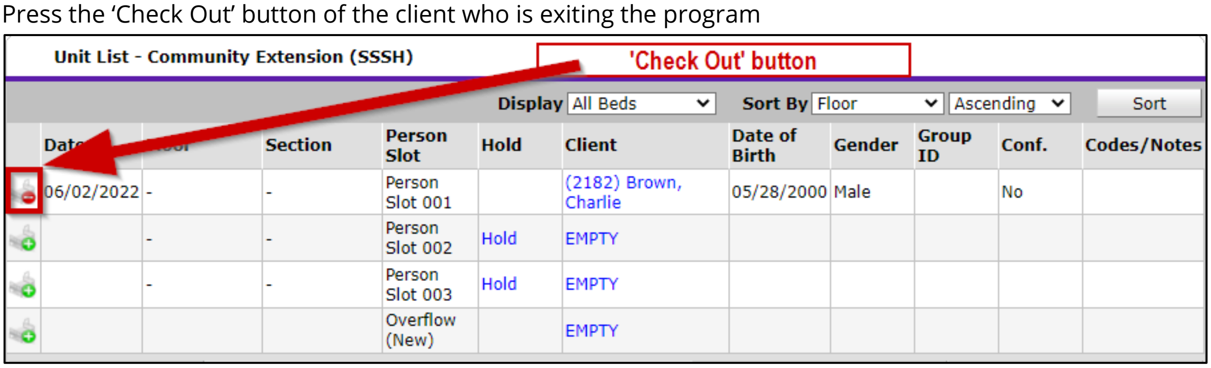
1. From the menu, select ShelterPoint



2. Ensure the provider is correct (you will see the program you are EDA'd as)
3. Select the appropriate Unit List:
    a. Community Extension (SSSH)
    b. Press 'Submit'
4. Under the ShelterPoint Dashboard, select 'View All'



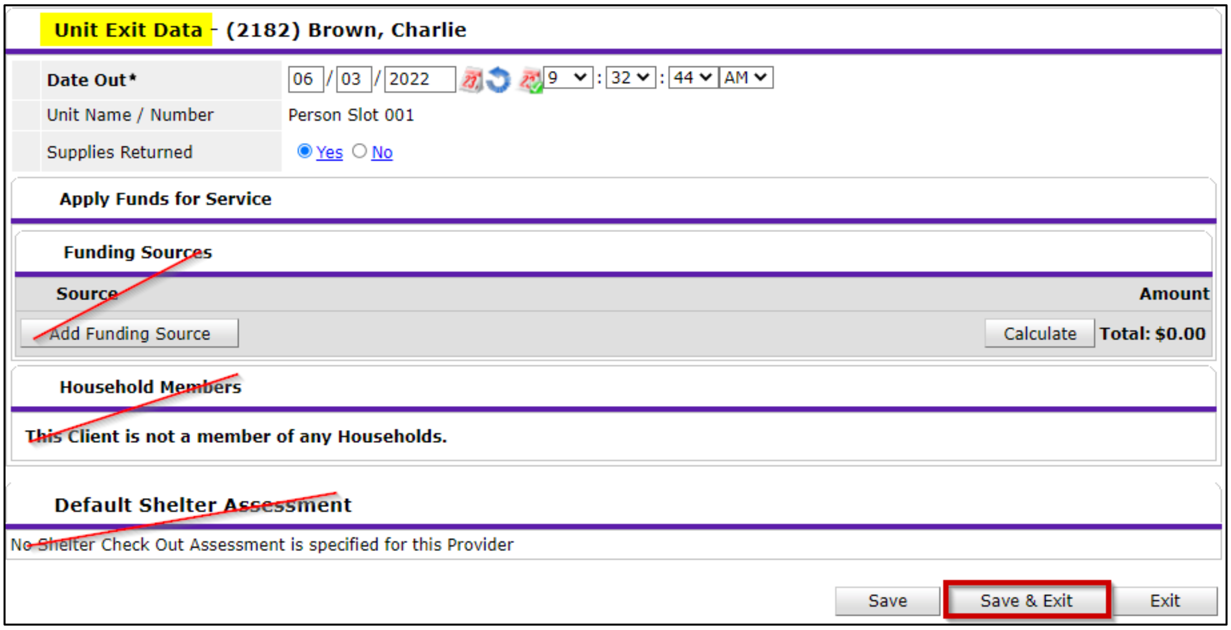
5. Press the 'Check Out' button of the client who is exiting the program



6. Under the Unit Exit Data section, ensure the 'Date Out' reflects the date the exit date

***NOTE:** *You cannot not use the backdate tool in ShelterPoint. If you need to enter a previous date for the 'Date Out' field, manually type the correct date in the field (use American format: month/day/year).*

7. Skip the Funding Sources section
8. Skip the Household Members section
9. Skip the Default Shelter Assessment section
10. Press 'Save & Exit'



The client is now checked out of the Community Extension (SSSH) Unit List, and fully exited from the program.

Miscellaneous Scenarios

Client Exits Program from PBSH Building

1. Under the Assessment Tab, complete Exit Assessment (see steps 3.1: ClientPoint – Assessments Tab)
2. Under the Entry/Exit Tab, provide Exit Date (see steps 3.2: ClientPoint – Entry/Exit Tab)
3. In ShelterPoint, Check Client out of Building (PBSH) Unit List (see steps 2.2: ShelterPoint – Check Out of PBSH Building)

***DO NOT re-check the client into the community extension (SSSH) unit list**. Once the client exits the program, they should **not** be checked into **ANY** unit lists.

Client Returns to Previous PBSH Building from Community Extension (SSSH)

Inform System Planner this client wants to return to PBSH building and whether there are open spaces. The System Planner will communicate with the Adult Placement Committee for transparency.

No need for Program Transfer Application if client wants to re-access the same building as before.

In HMIS, complete the following:

1. Under the Assessment Tab, complete the CHF Housing Assessment (to reflect rehousing) (see steps 2.4: ClientPoint – Assessments Tab)

2. In ShelterPoint, check client out of Community Extension (SSSH) Unit List (see steps 3.3: ShelterPoint – Check Out of Community Extensions (SSSH))

***Note**: Ensure Client remains active in your program (ensure active entry under Entry/Exit Tab).

3. In ShelterPoint, check client into Building (PBSH) Unit List (see steps 1.9: ShelterPoint – Check In to BSH Building)