Before we begin – login so you can follow along

You can try out some of the tips we will show you today in the HMIS@NCCEH training site for ServicePoint*

sp5.servicept.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.

NCCEH

HMIS@NCCEH
HMIS Users Meeting

June 2020

NC COALITION to end HOMELESSNESS

Agenda

June 2020

We are recording today's meeting

System Updates

COVID-19 Response - Reporting

How can we help?

Case Manager tab & Dashlet report

Case Plans tab & ART report

2nd Quarter Recommended Report

What's Next?

NCCEH

Welcome

Reminders

Your line is muted.

We will unmute the line during Q&A pauses.

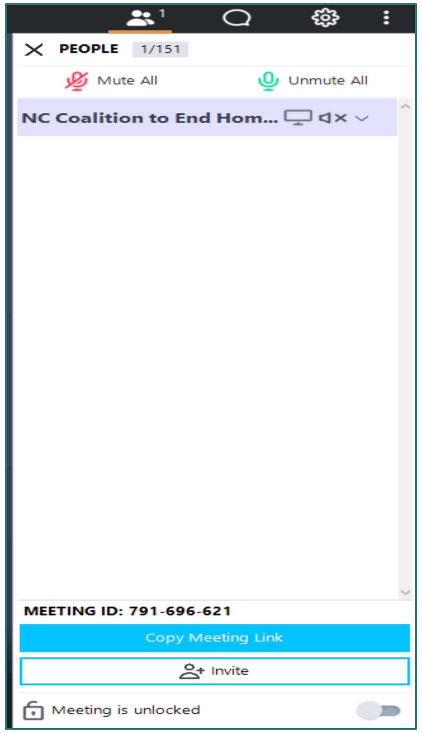
The chat box is available to use anytime.

NCCEH

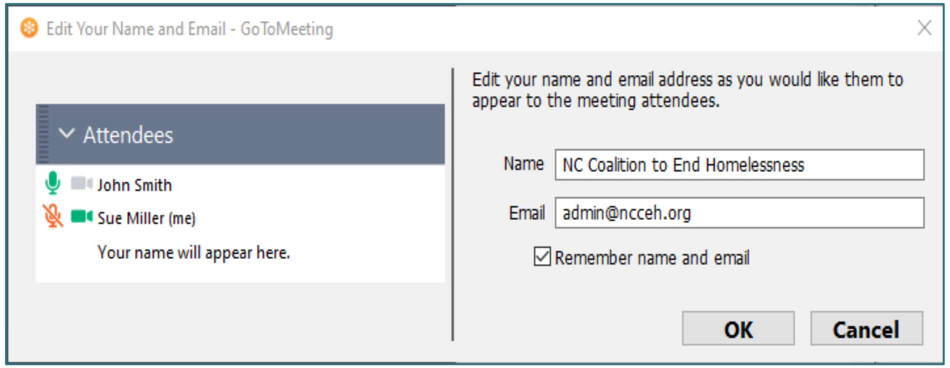
Who is here?

- Enter your full names, so we know who attended and who asks questions
- If multiple folks are watching at once, use a combo name like, “Andrea Carey and Andy Phillips – the Ands”

1



2



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System Updates

IRS info on Economic Impact Payments

Clients sending EIPs to your Address or have Questions? Holly Longley from the IRS is ready to answer your questions. Email: Holly.A.Longley@irs.gov Phone: 919-850-1123

Key Information:

- www.irs.gov/nonfilereip
- More information is being added to IRS.gov/coronavirus.
- You can find additional marketing materials and answers to frequently asked questions at IRS.gov/eippartners.
- Please follow the IRS Social Media accounts to receive the latest information that the IRS shares.

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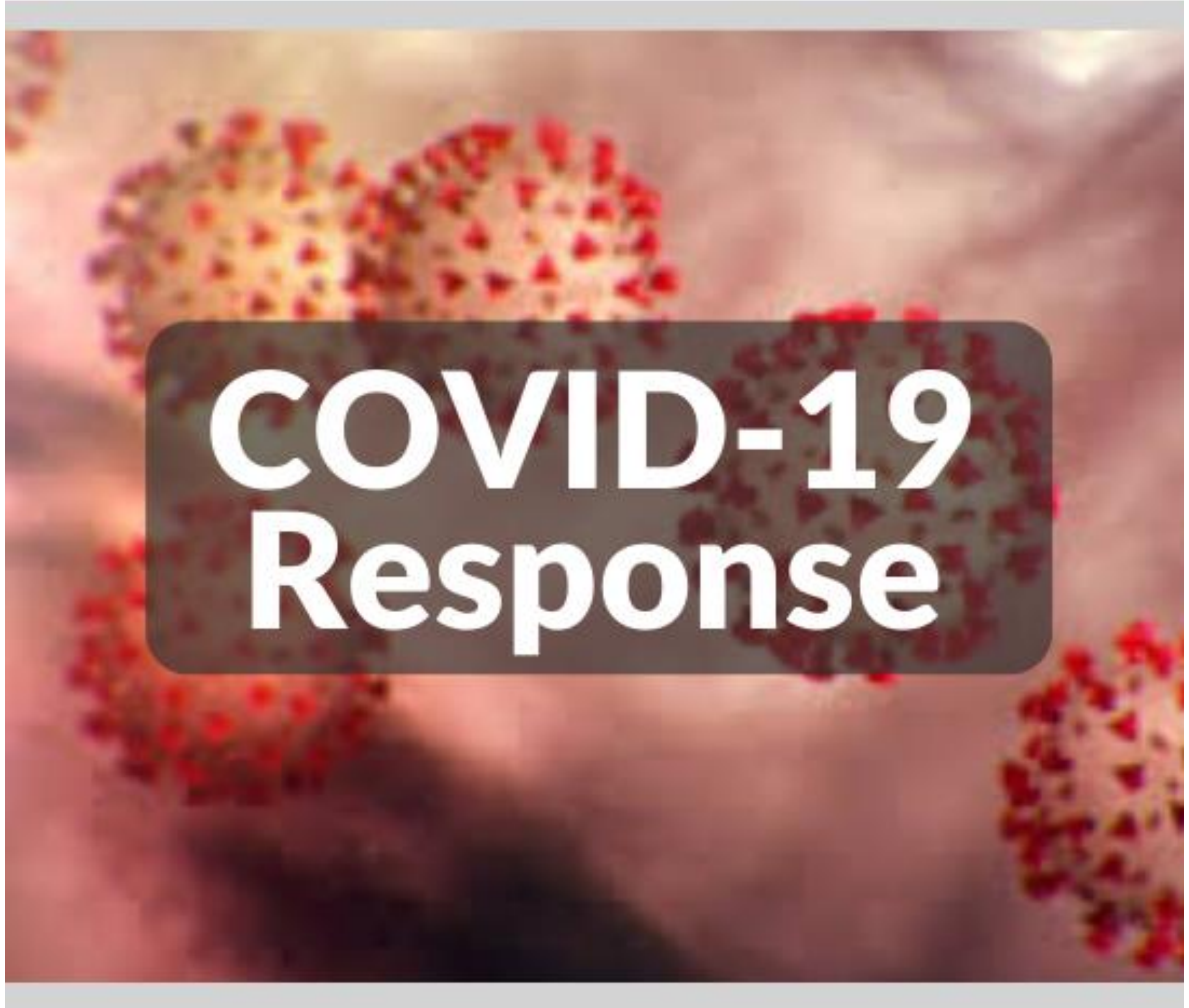
COVID-19 Response in HMIS

- Why Collect Data
- Sharing and Privacy Concerns
- Why these Questions
- Who to Collect and Enter Data for
- Where to Find Questions
- How to Enter Data
- Other Data Considerations

Find all this and more at ncceh.org/hmis/training



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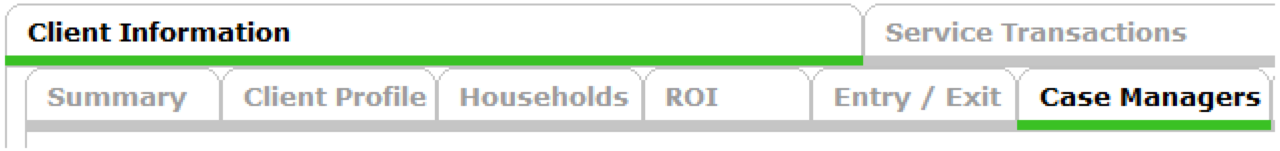
How can we help?

Case Manager Tab

Track who is a client's Case Manager



Record client's point person

Save best contact information

See changes over time

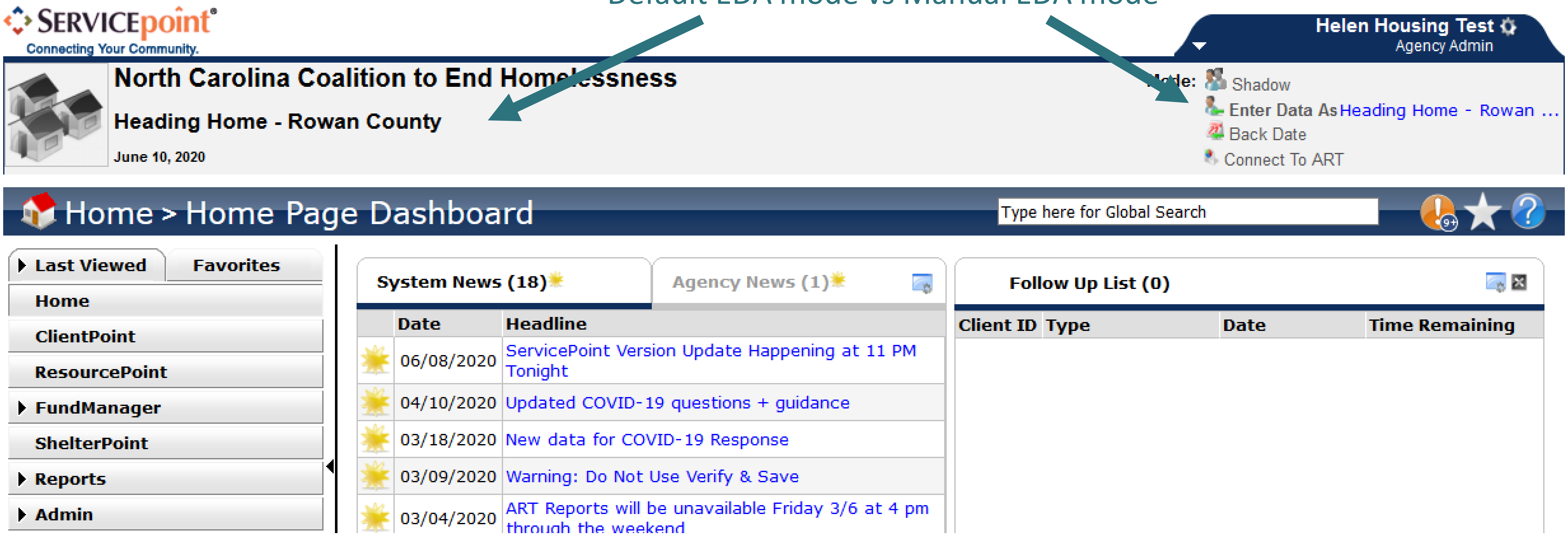
Access other ServicePoint features:

- My Client Counts Reports
- Follow-up Lists
- Case Plans/Goals

Track who is a client's Case Manager

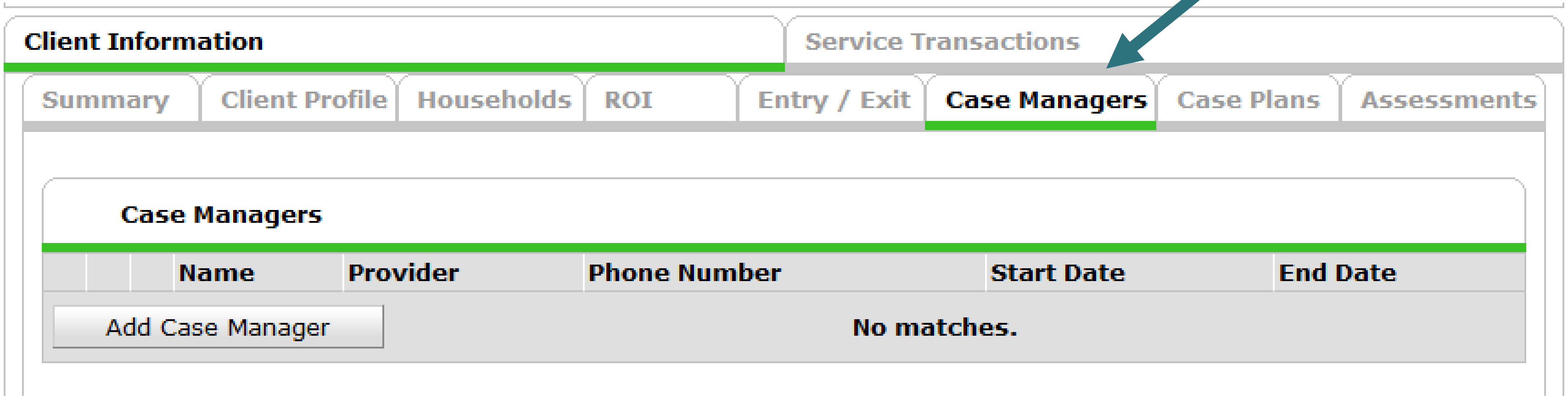
- Enter Data As (EDA) mode matters!

Default EDA mode vs Manual EDA mode



Add a Case Manager

- Go through ClientPoint
- Case Managers is under the Client Information Tab
- Tabs can be adjusted for each project by the Data Center
- Click Add Case Manager



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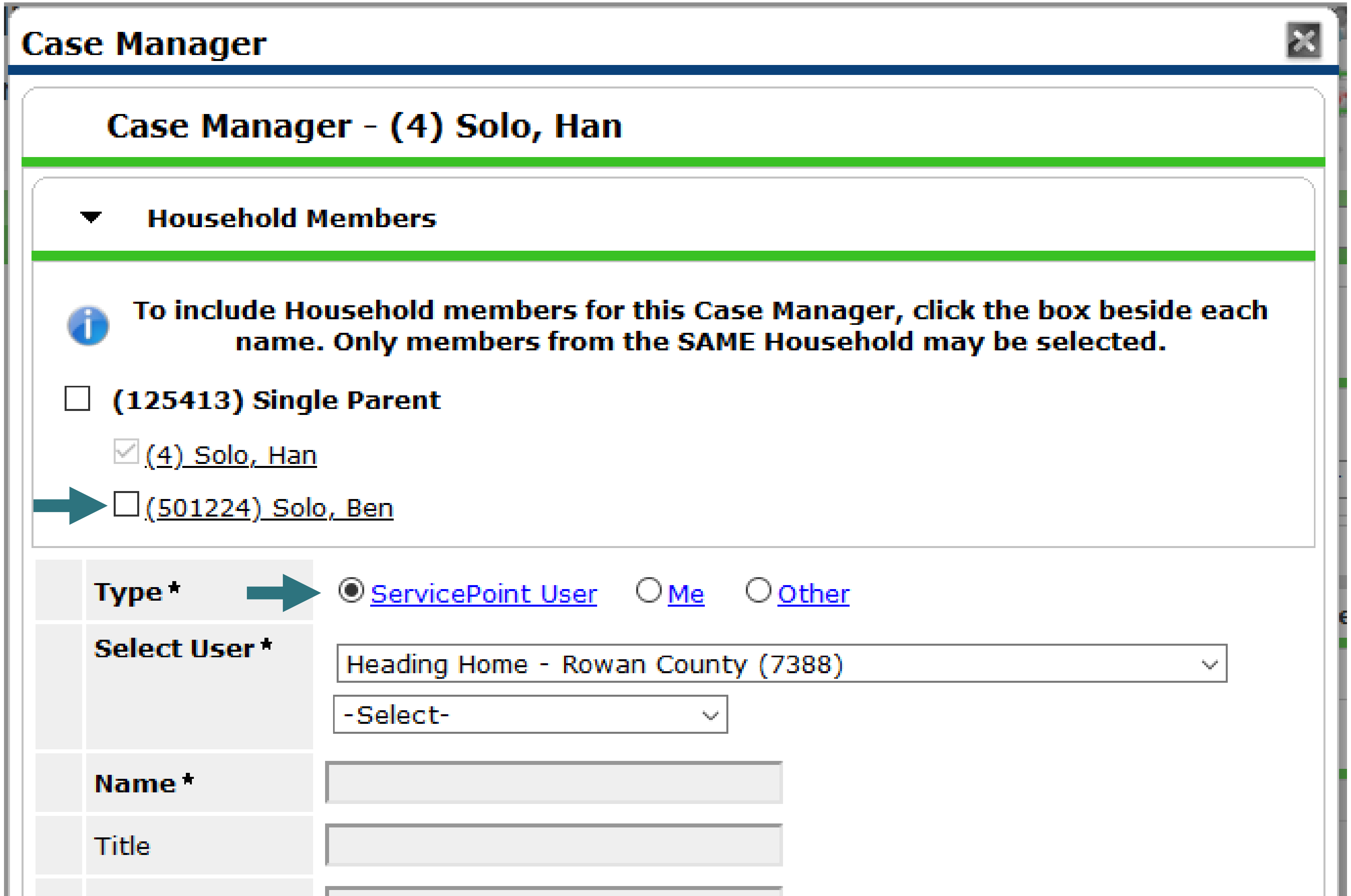
Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?



Add a Case Manager

Decision Points:

- Does the case manager work with the whole household?
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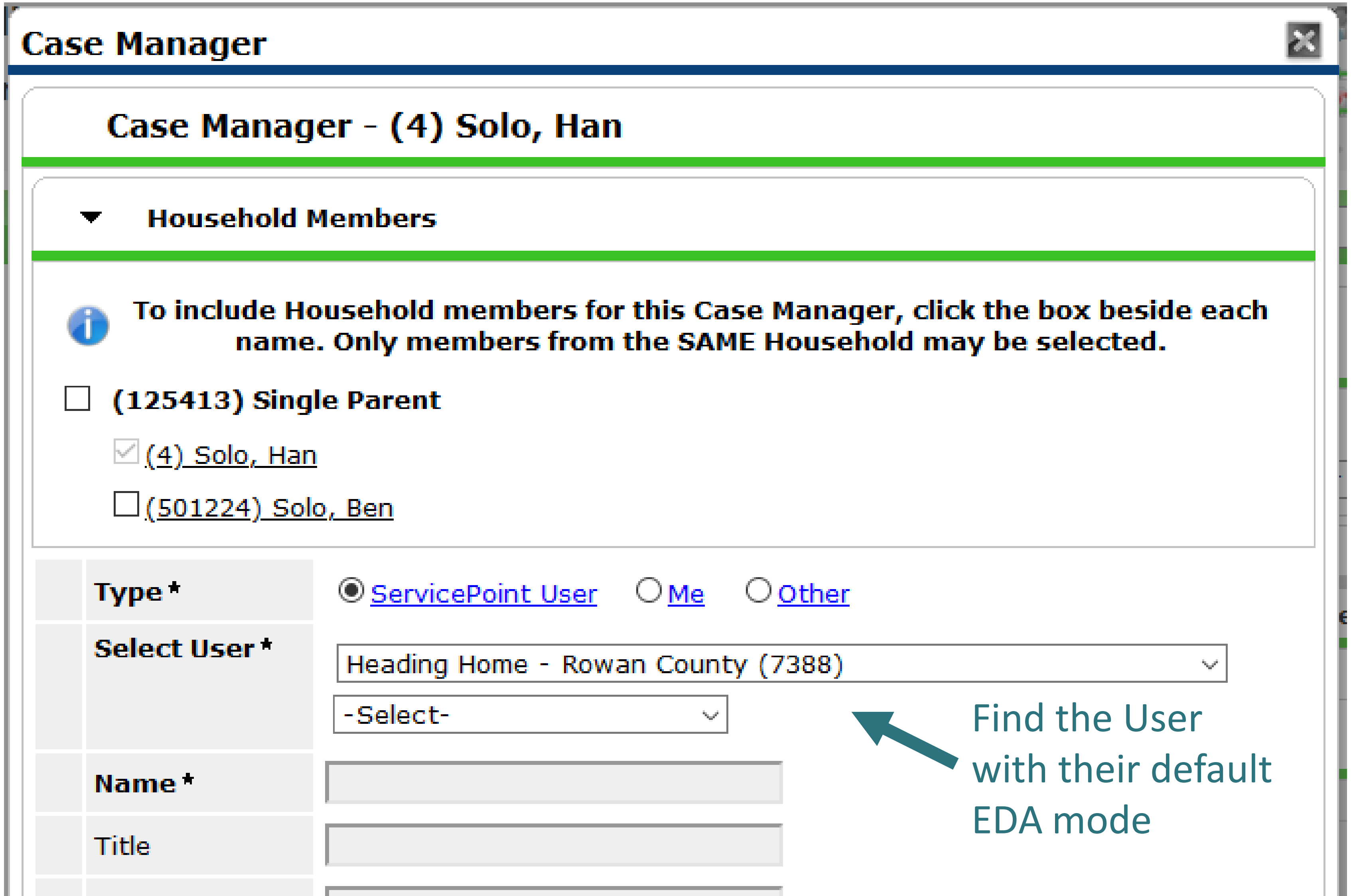
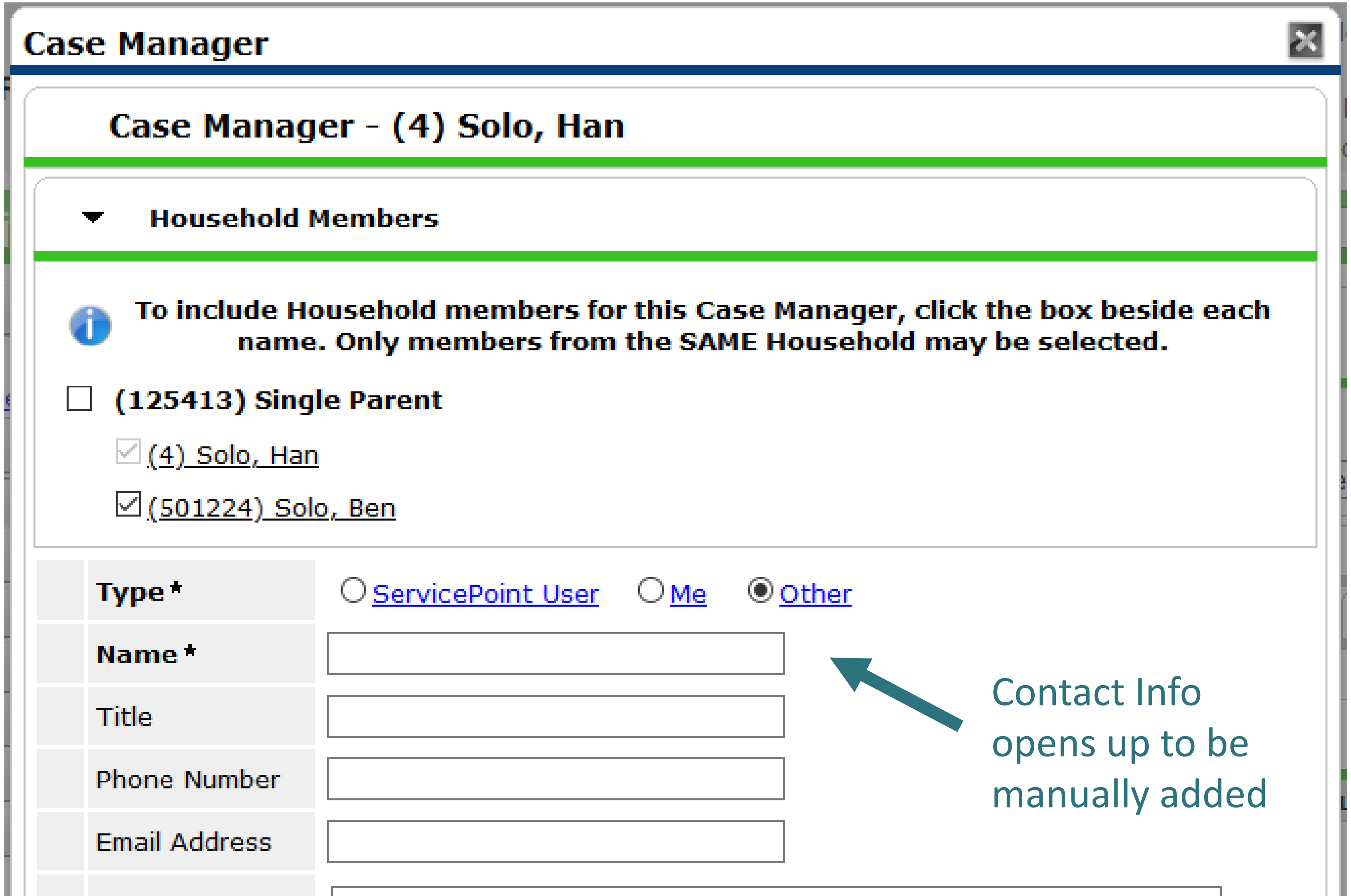


Find the User with their default EDA mode

Add a Case Manager: Other

Decision Points:

- Does the case manager work with the whole household?
- Is the case manager an HMIS User?

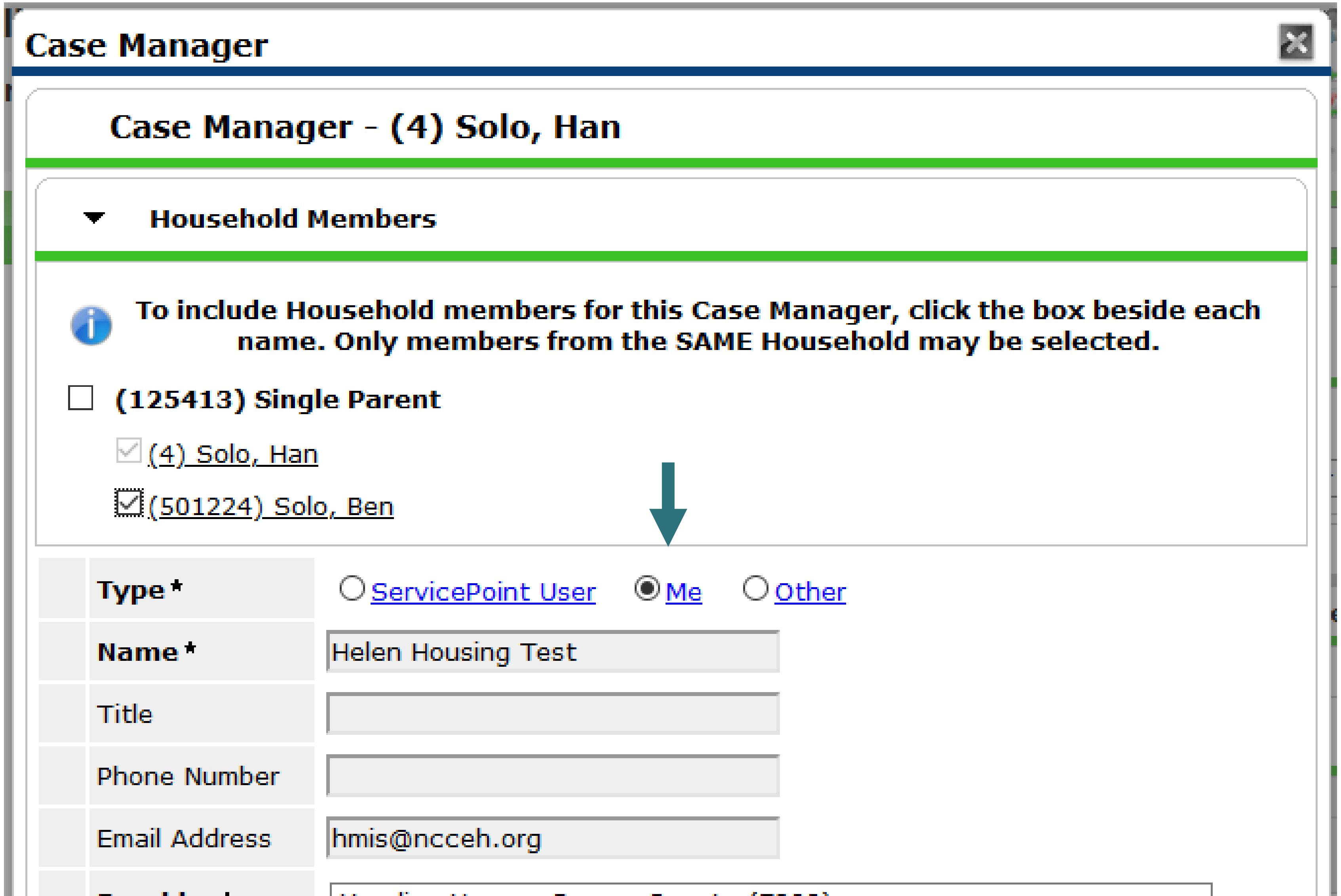


Contact Info opens up to be manually added

Add a Case Manager

Usually, you are selecting yourself!

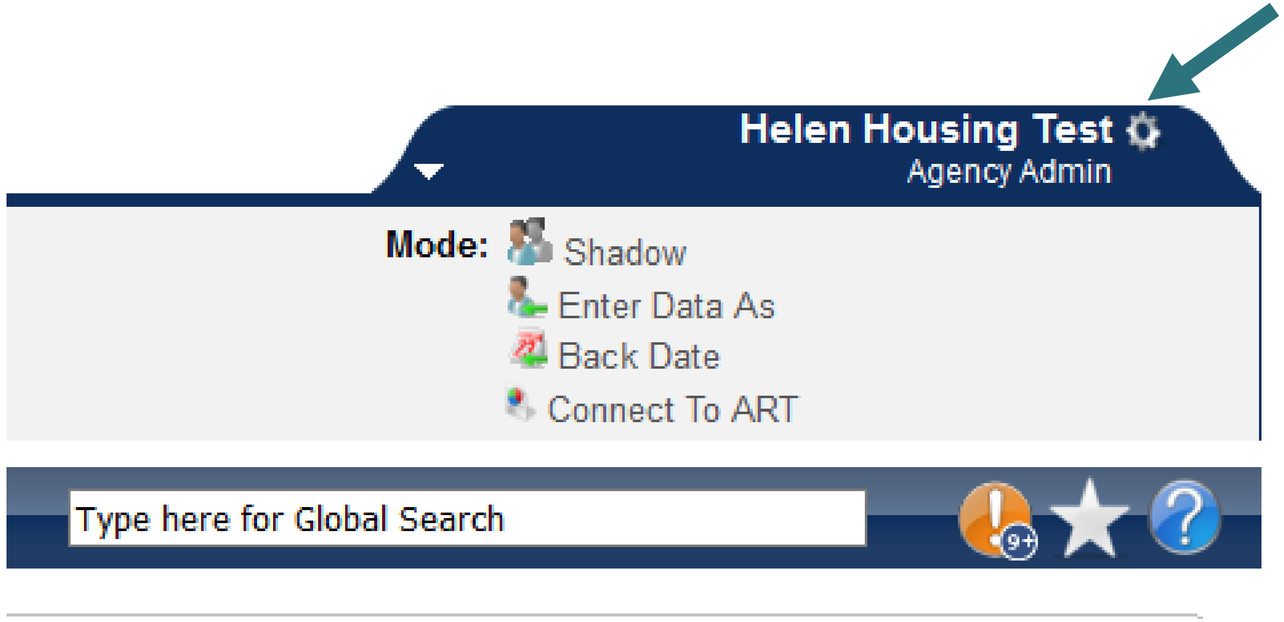
Name & Contact Info automatically appears



How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Find the User Profile Setting icon



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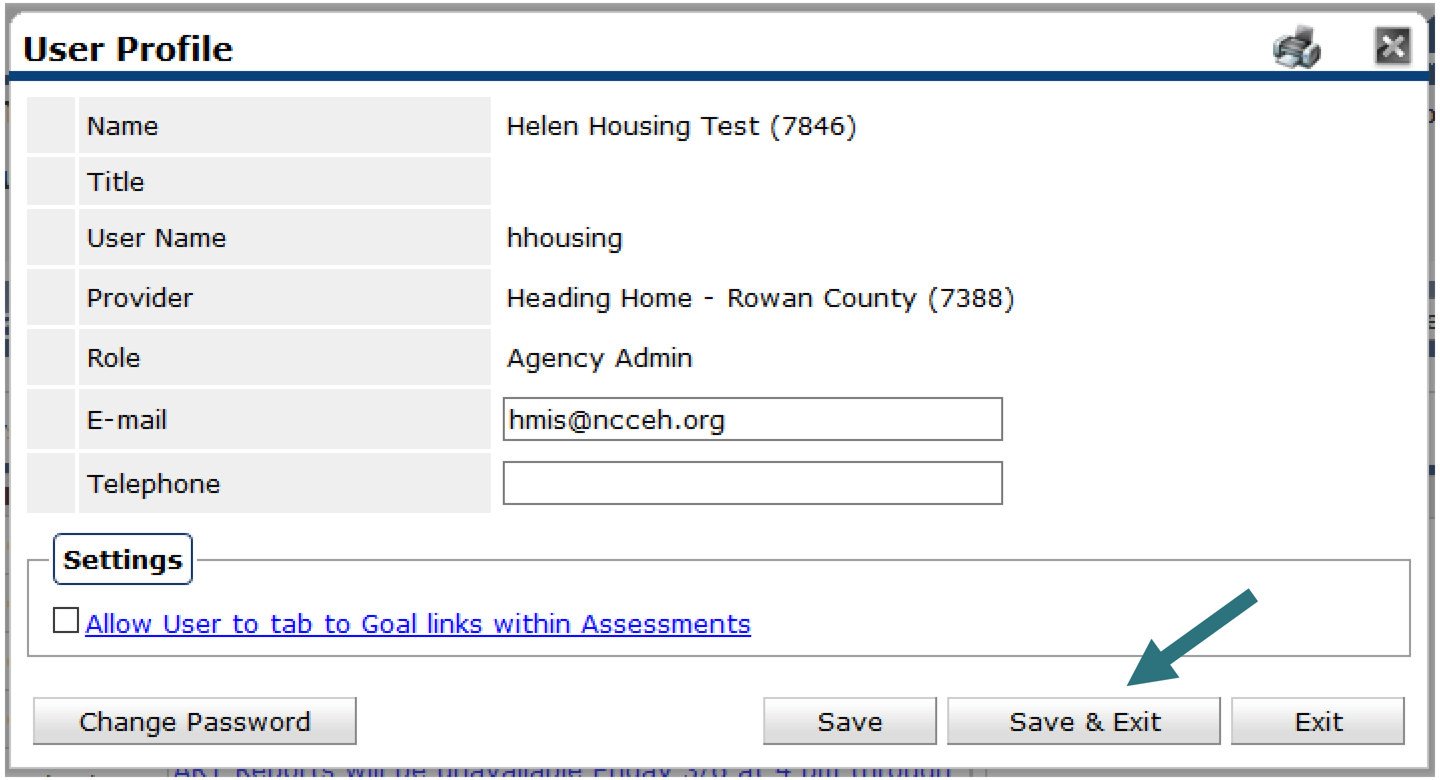
How do you manage contact info in HMIS

Remember, this tip and others are in the Intro to ServicePoint Video Training on ncceh.org/hmis/training

- Update E-mail and Phone info
- Save & Exit



User Profile

Name	Helen Housing Test (7846)
Title	
User Name	hhousing
Provider	Heading Home - Rowan County (7388)
Role	Agency Admin
E-mail	hmis@ncceh.org
Telephone	

Settings

☐ Allow User to tab to Goal links within Assessments

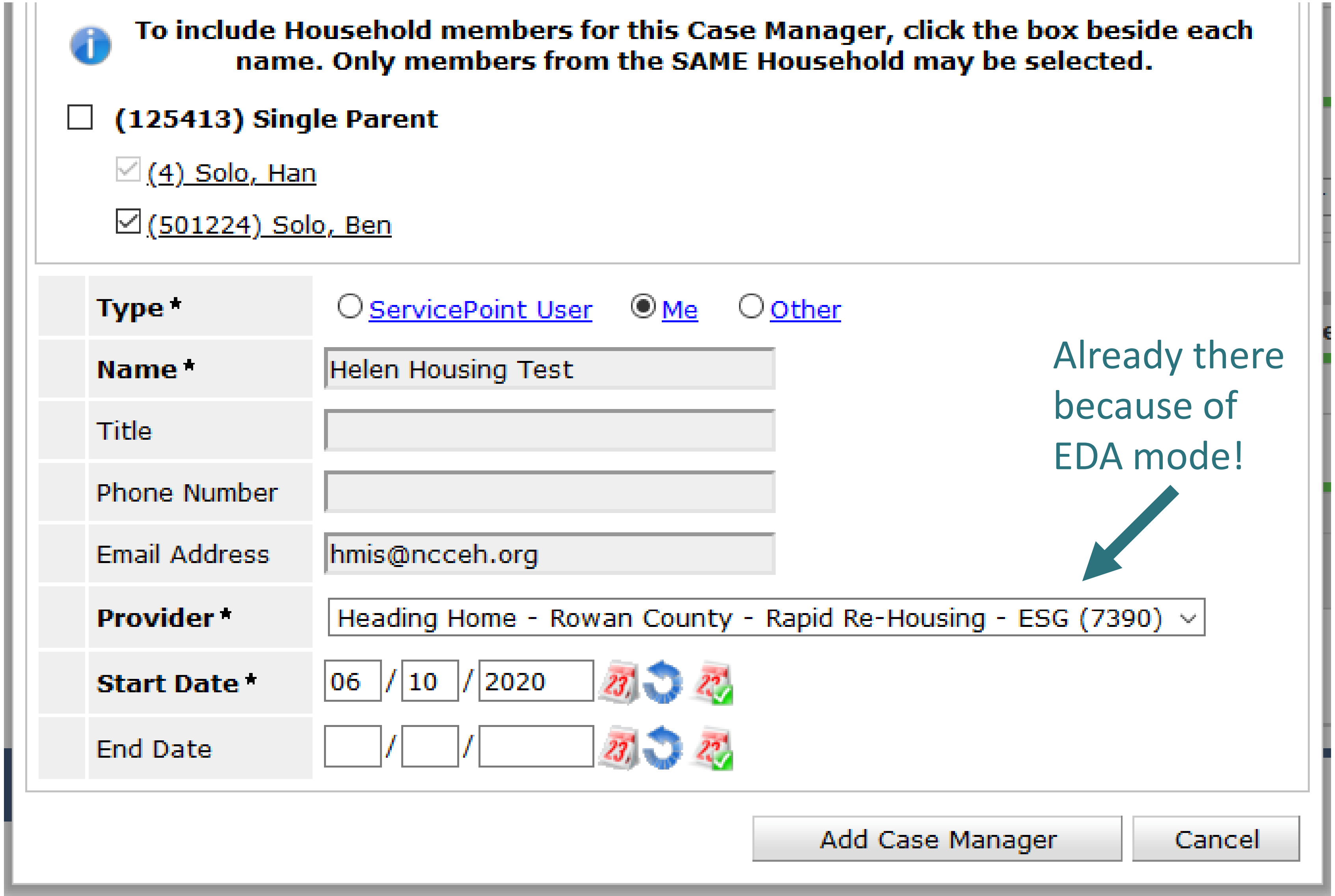
Change Password | Save | Save & Exit | Exit

NCCEH

Add a Case Manager

Decision Points:

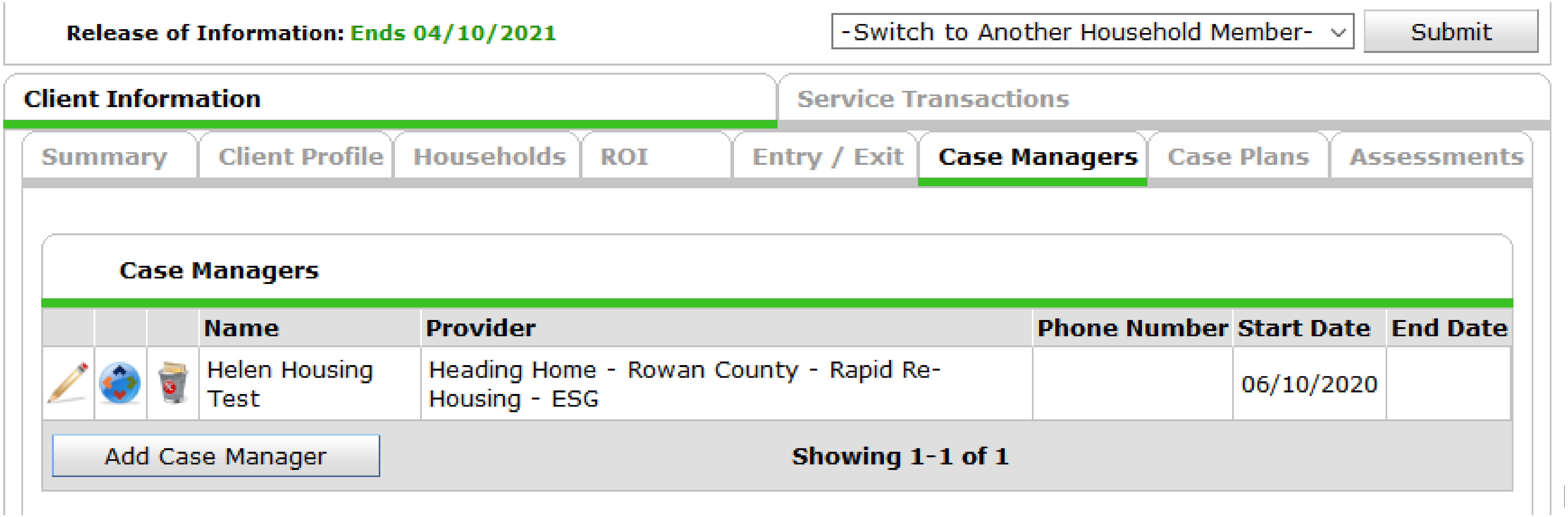
- Which project does the case manager work on behalf of?
- When did they start working together?



Already there because of EDA mode!

Case Manager Saved!

- Now anyone in my agency or visibility group can see our work together!



Let’s see this in action

HMIS@NCCEH training site for ServicePoint*

sp5.servicept.com/hmisncceh_training

*Remember, all HMIS Users have a training profile that mirrors your active one. Forgot your password? You can reset it just like the live site.

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Counts Reports

Home Page Counts Dashlet Reports

Pros:

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Rolling dates available

Cons:

- Limited, cannot change options
- Only 4 spots
- EDA mode sensitive

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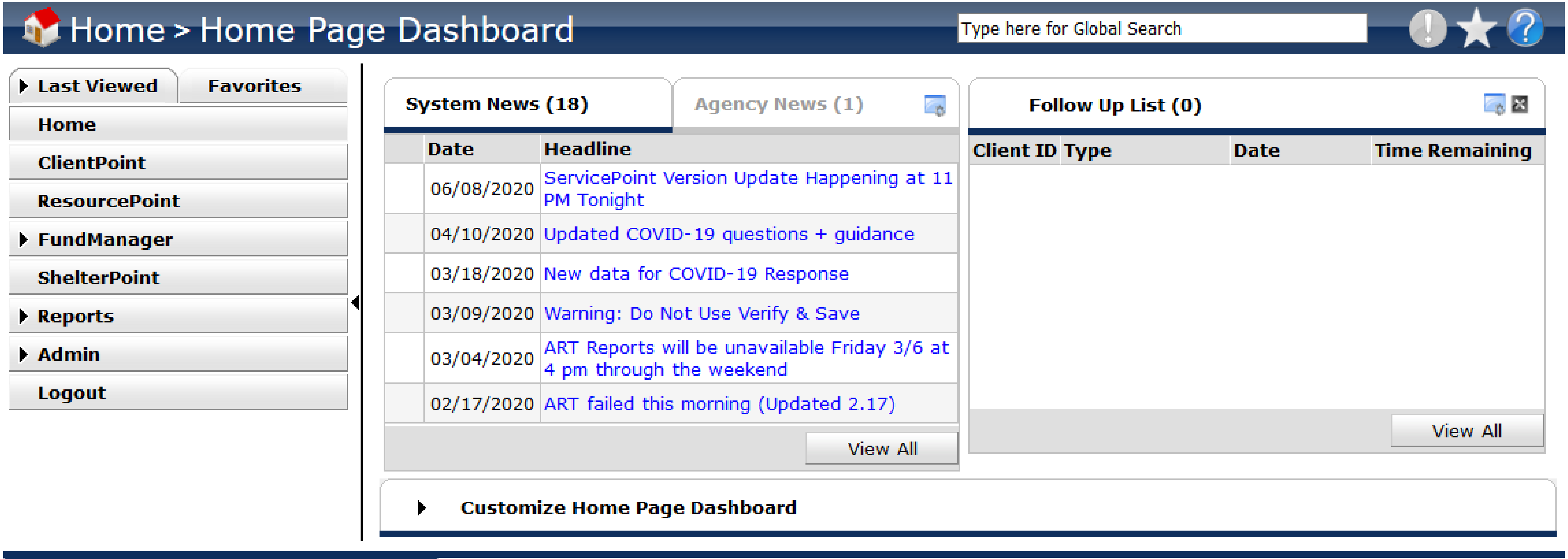
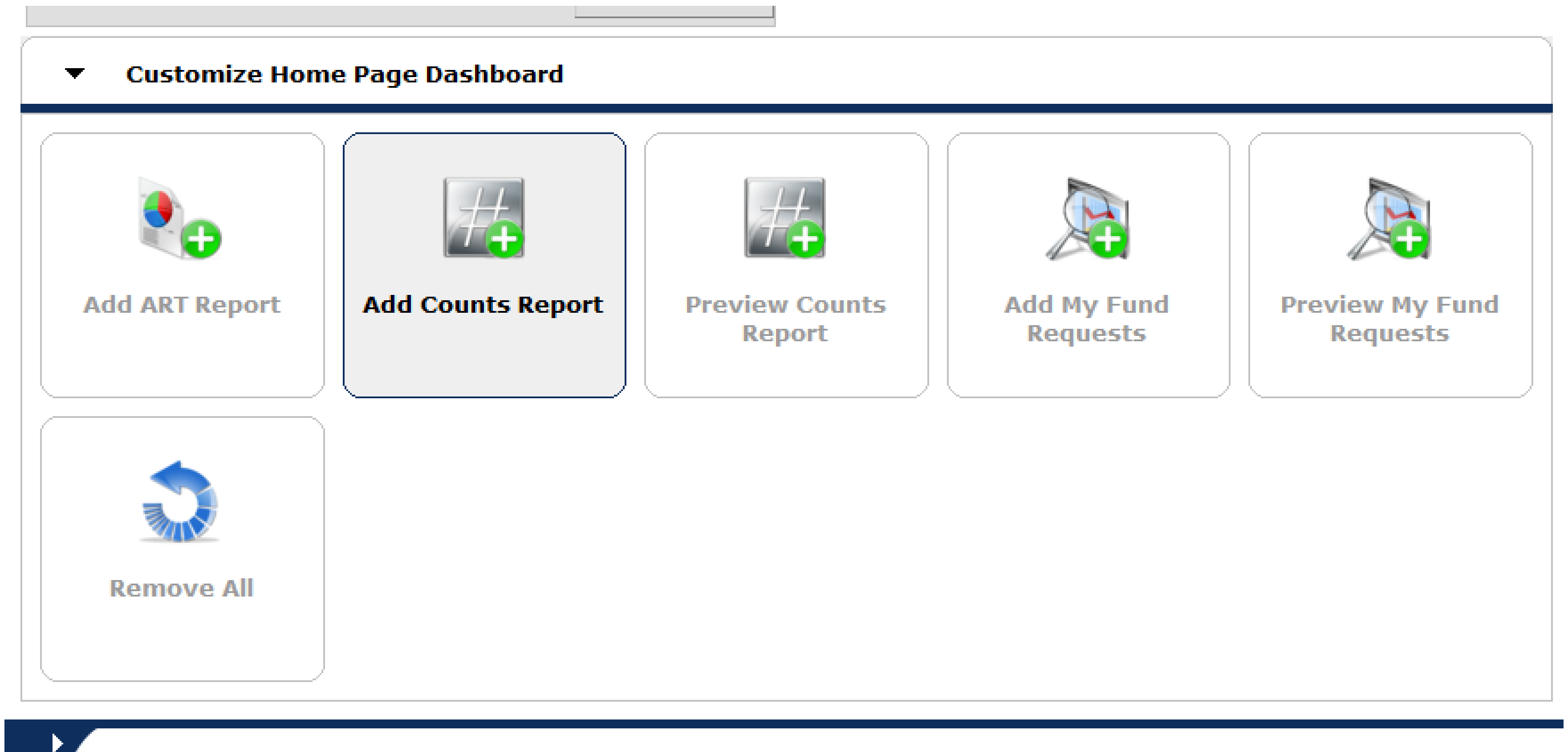
Set-Up Counts Reports

- Open the black arrow for Customize Home Page Dashboard



Set-Up Counts Reports

- Look for Add Counts Report
- Options may vary



Set-Up Counts Reports

System News (18) | Agency News (1)

	Date	Headline
	06/08/2020	ServicePoint Version Update Happening at 11 PM Tonight
	04/10/2020	Updated COVID-19 questions + guidance
	03/18/2020	New data for COVID-19 Response
	03/09/2020	Warning: Do Not Use Verify & Save
	03/04/2020	ART Reports will be unavailable Friday 3/6 at 4 pm through the weekend
	02/17/2020	ART failed this morning (Updated 2.17)

View All

Follow Up List (0)

Client ID	Type	Date	Time Remaining

View All

Click the Pencil!

Counts Report

Top-Left	Top-Right
Bottom-Left	Bottom-Right

Refresh

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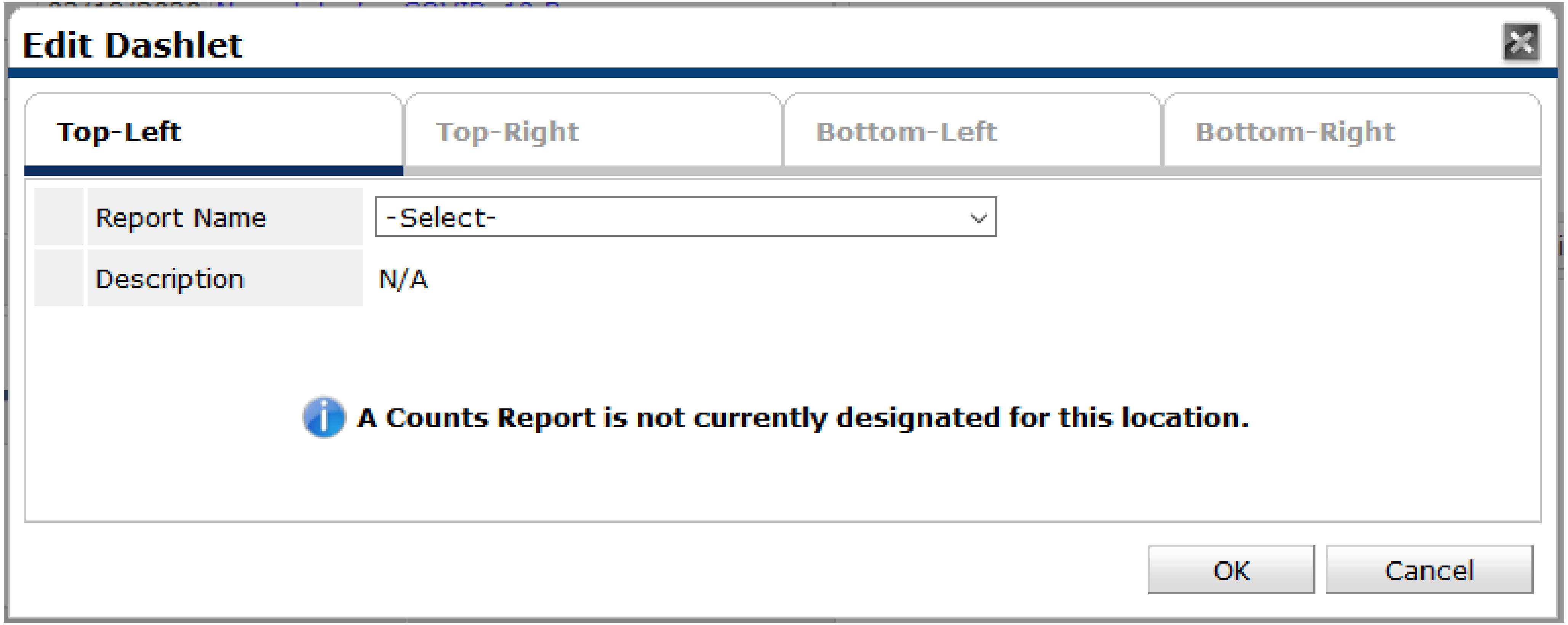
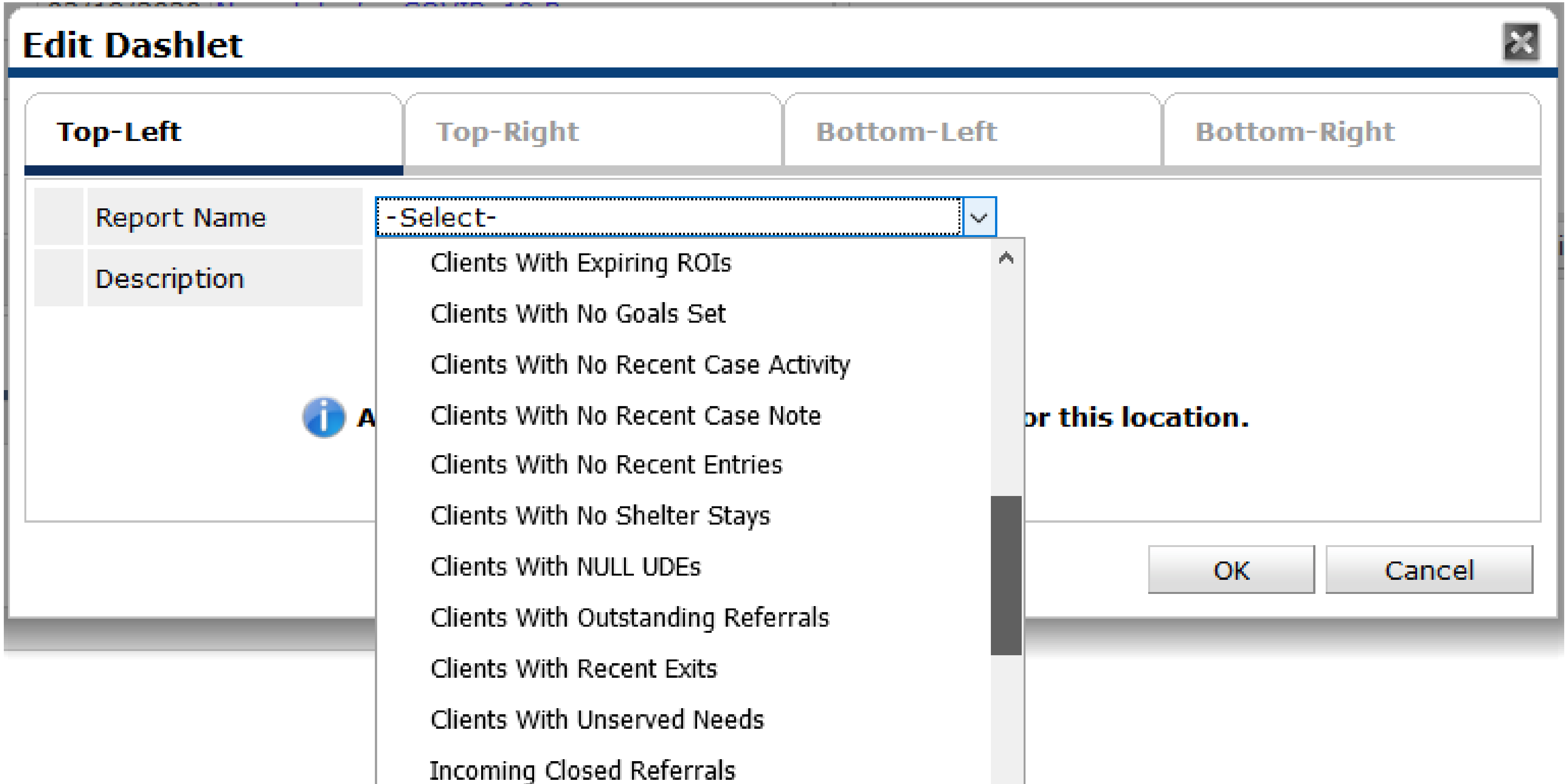
Set-Up Counts Reports



Set-Up Counts Reports

- Standard list to choose from



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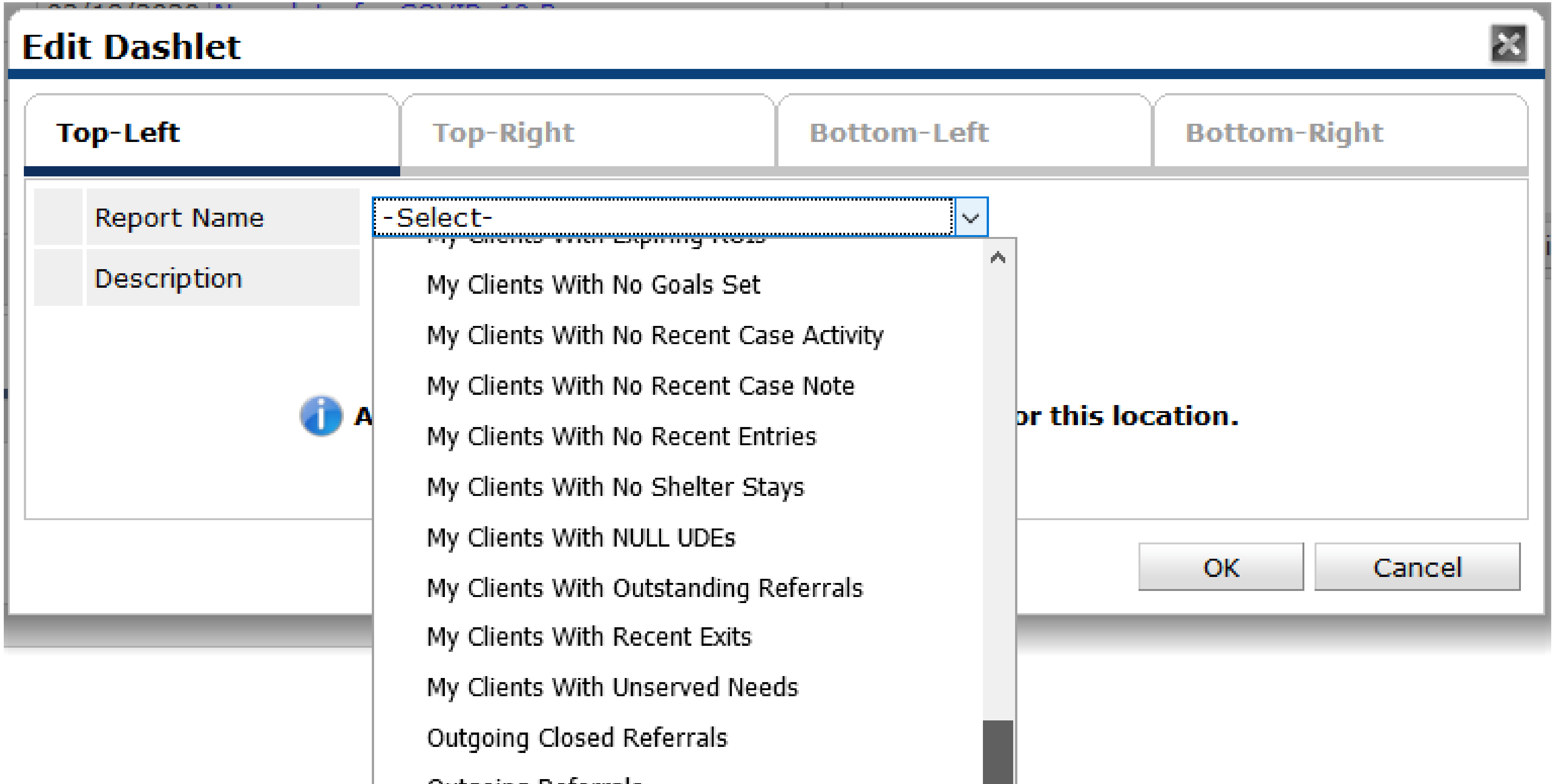
Set-Up Counts Reports

- Many use Case Manager tab to find “My Clients”



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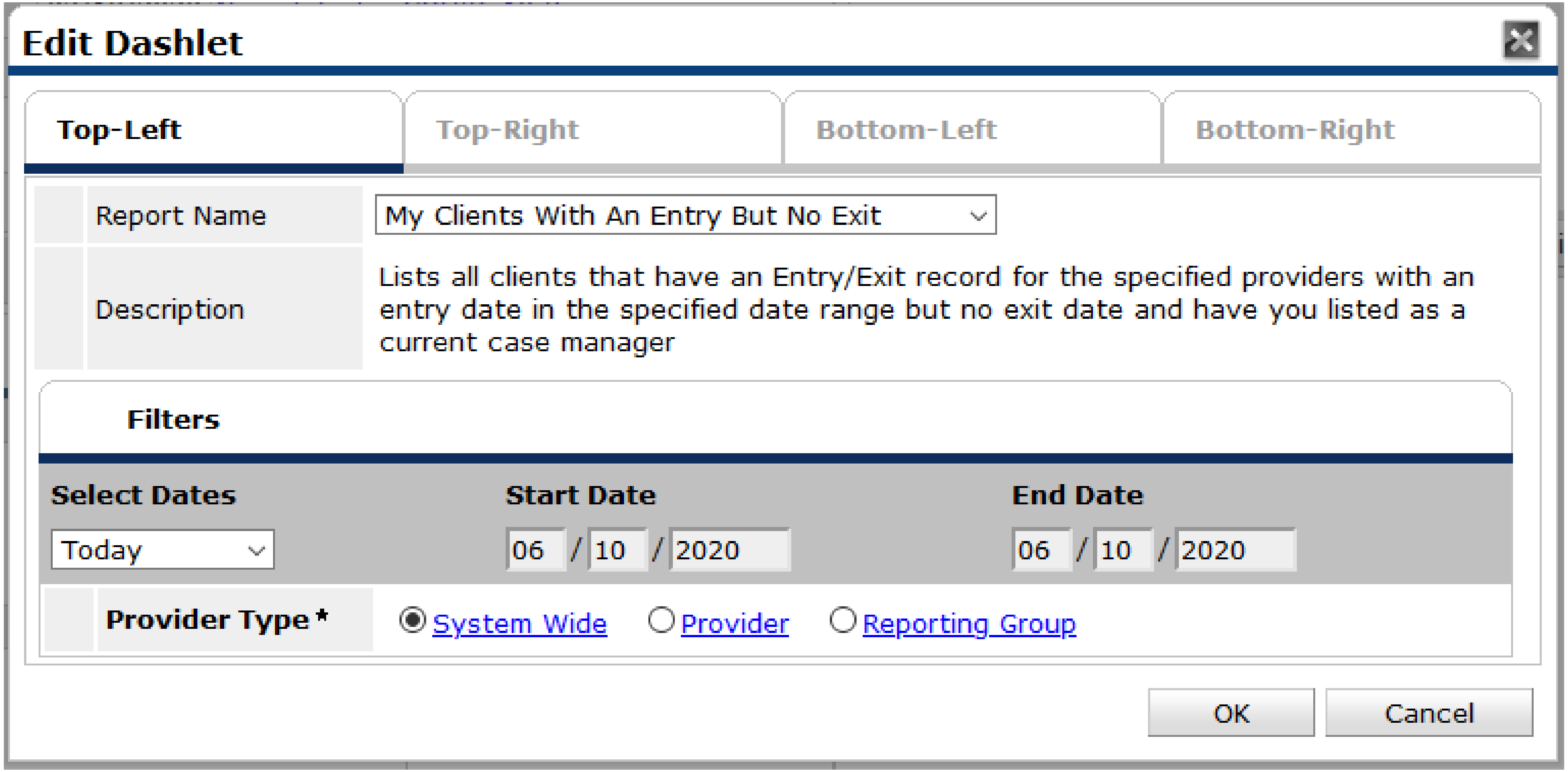
Set-Up Counts Reports

- Two main filters available: (Rolling) Dates and Projects



Edit Dashlet

Top-Left | Top-Right | Bottom-Left | Bottom-Right

Report Name: My Clients With An Entry But No Exit

Description: Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager

Filters

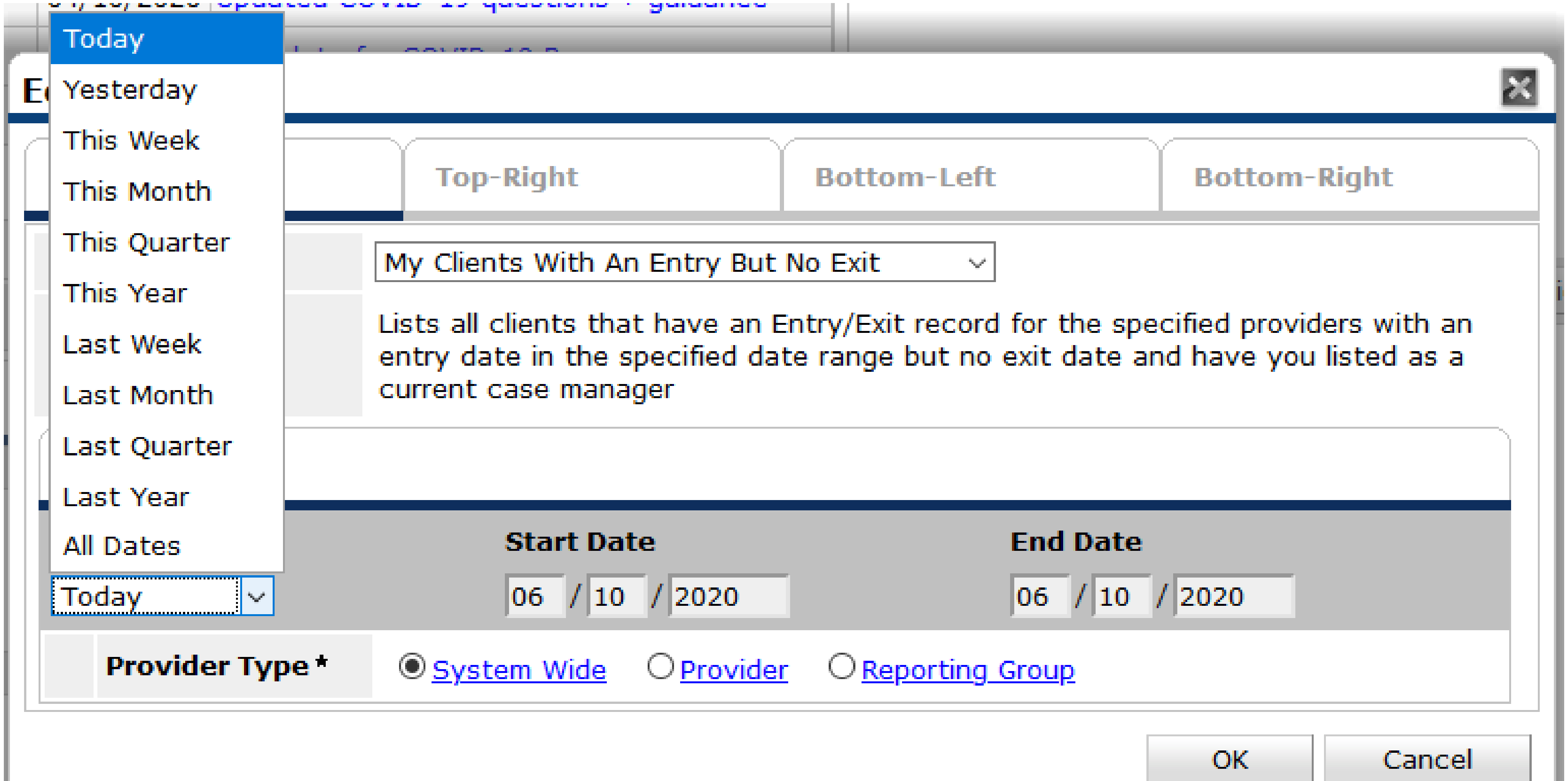
Select Dates	Start Date	End Date
Today	06 / 10 / 2020	06 / 10 / 2020

Provider Type * (•) System Wide ( ) Provider ( ) Reporting Group

OK Cancel

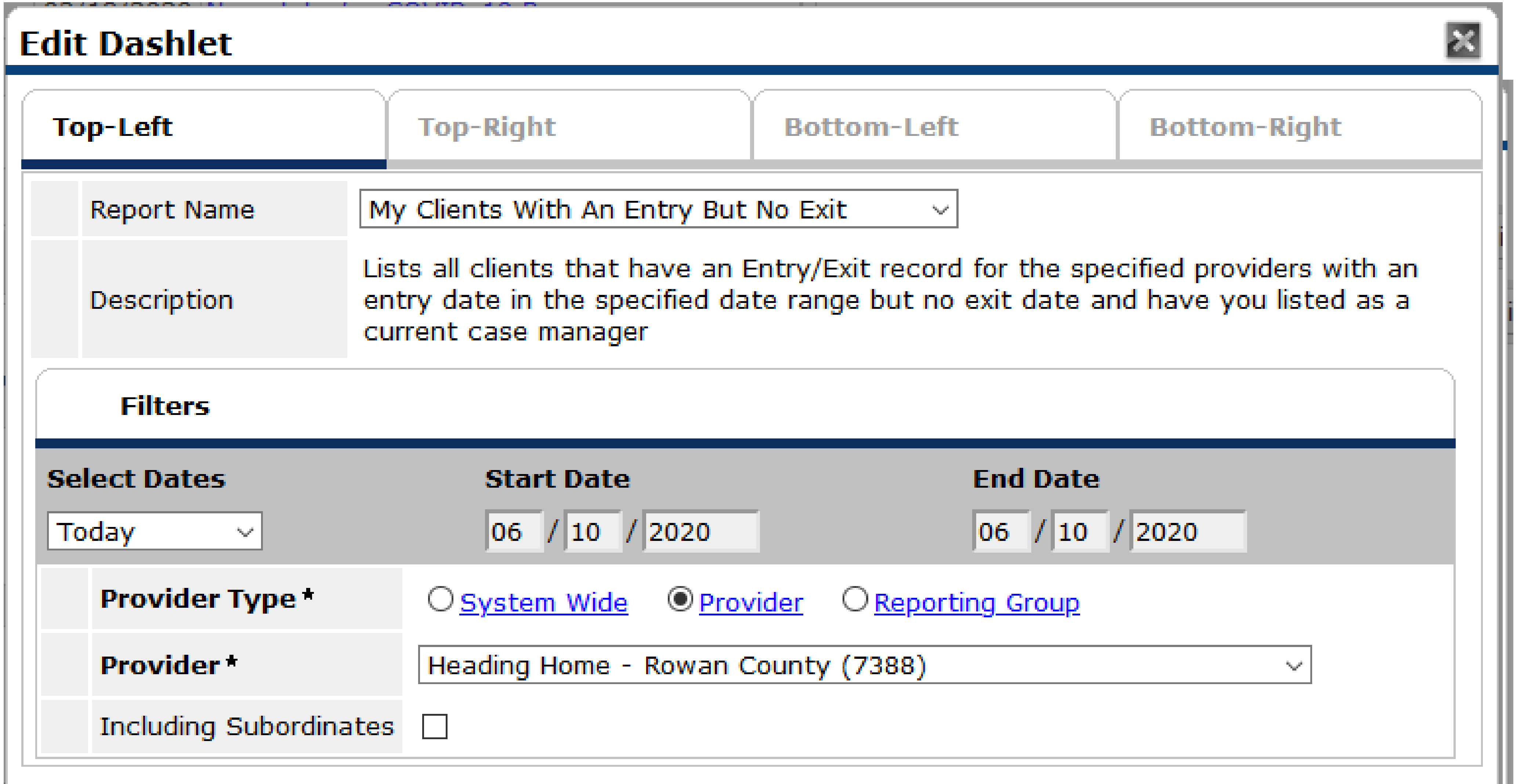
NCCEH

Set-Up Counts Reports



Set-Up Counts Reports

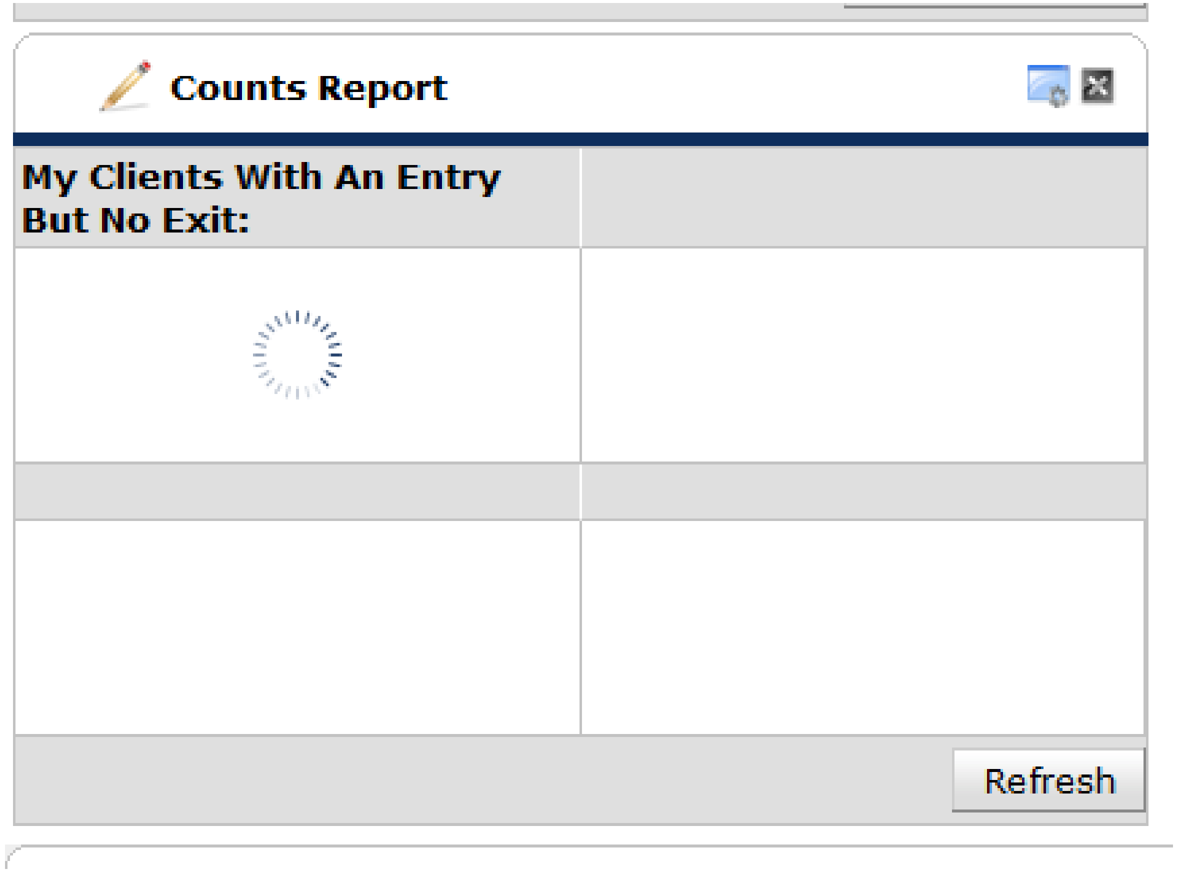
- Provider lets you select the entire agency (incl. subordinates) or not



NCCEH

Set-Up Counts Reports

- Once a box is modified, the report will immediately pull.

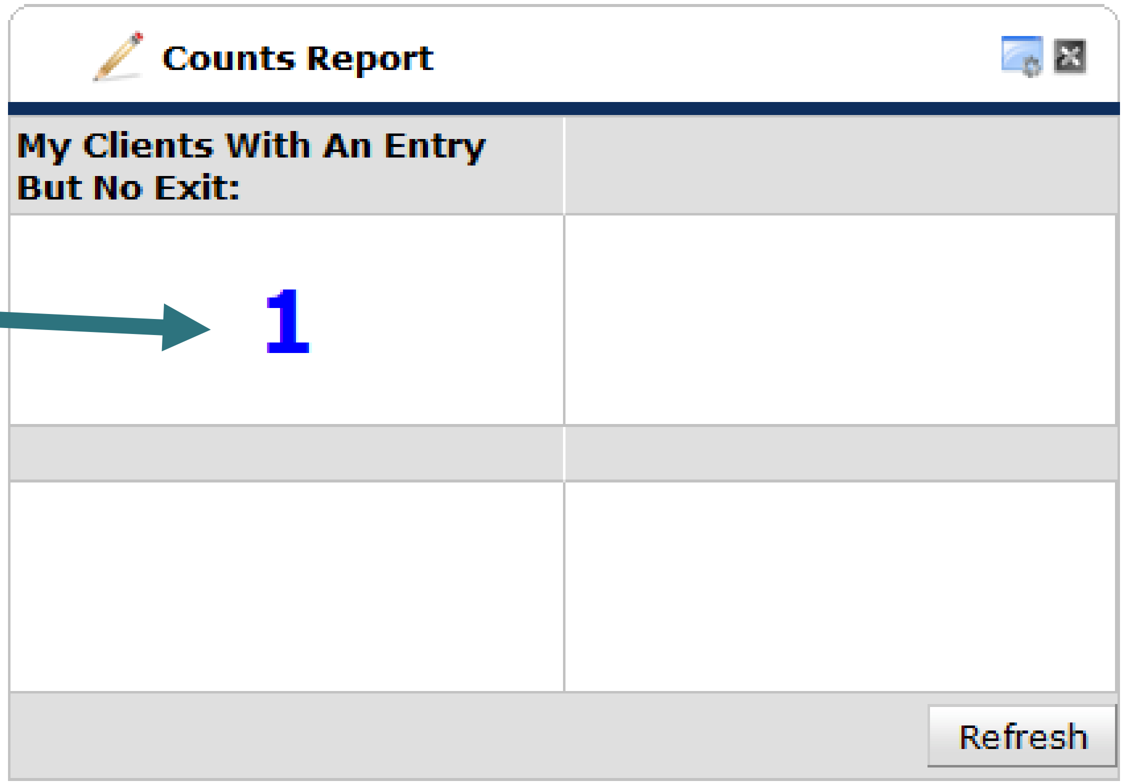


NCCEH

Set-Up Counts Reports

- Once a box is modified, the report will immediately pull.

Click on the blue numbers to see the whole list



Sometimes, when changing EDA mode or just logging in, you'll want to refresh the data

Home Page Counts Dashlet Reports

- Generate quick lists of clients on your homepage
- Keep an eye on data quality
- Good options to consider:
    - See when new Referrals are recorded
    - See when a follow-up is scheduled for this day/week/month
    - See info about *your* clients

- Watch for how data changes in and out of EDA mode

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Home Page Counts Dashlet Reports

Questions?

What would you like to try?

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Case Plans, Goals, and ART Report

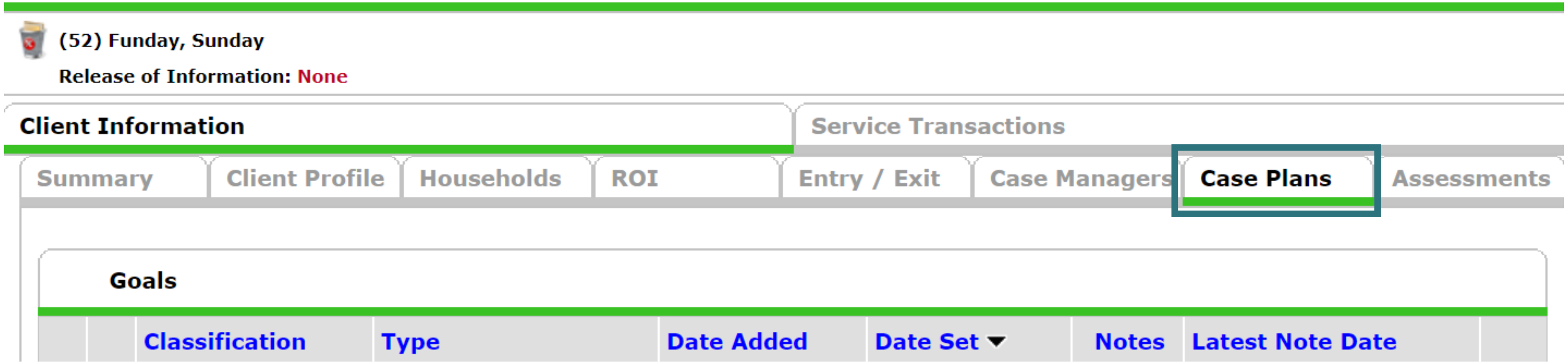
Case Plans, Goals, and ART Report

- Track client progress
- Add Case Notes on the Progress
- Link Service Transactions
- 0404 ART Report – Client Case Plans Overview

NCCEH

How to add Case Goals

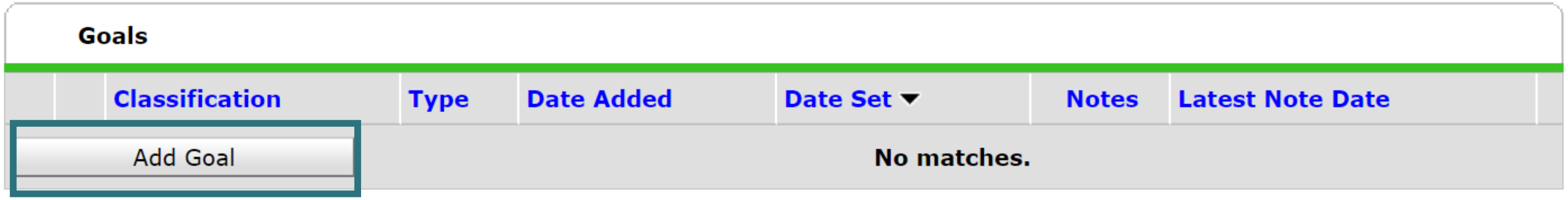
- Navigate to the client’s profile then to Case Plans



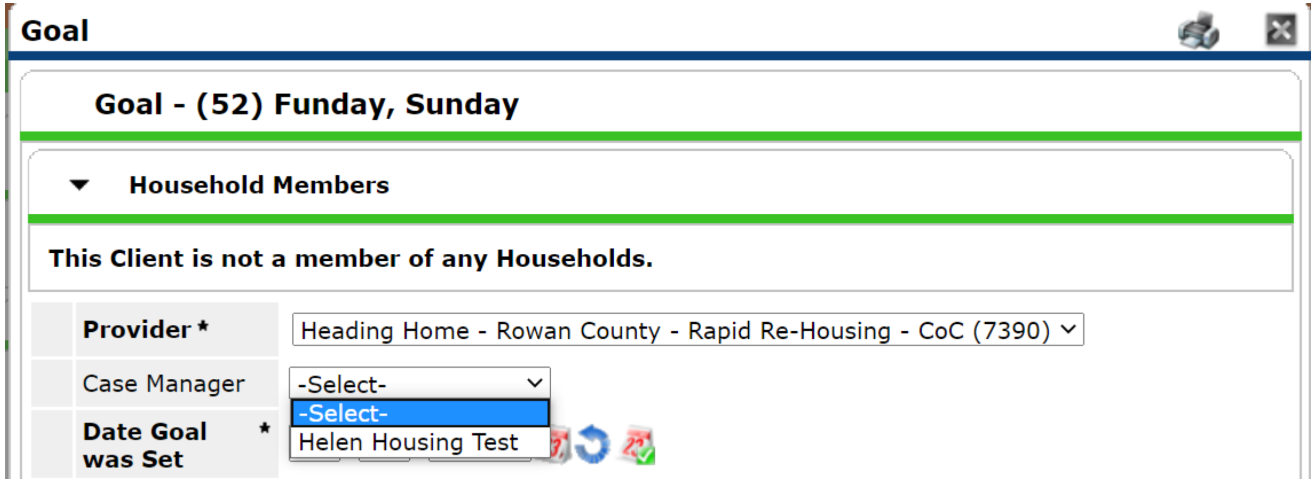
NCCEH

How to add Case Goals

- From there, click Add Goal



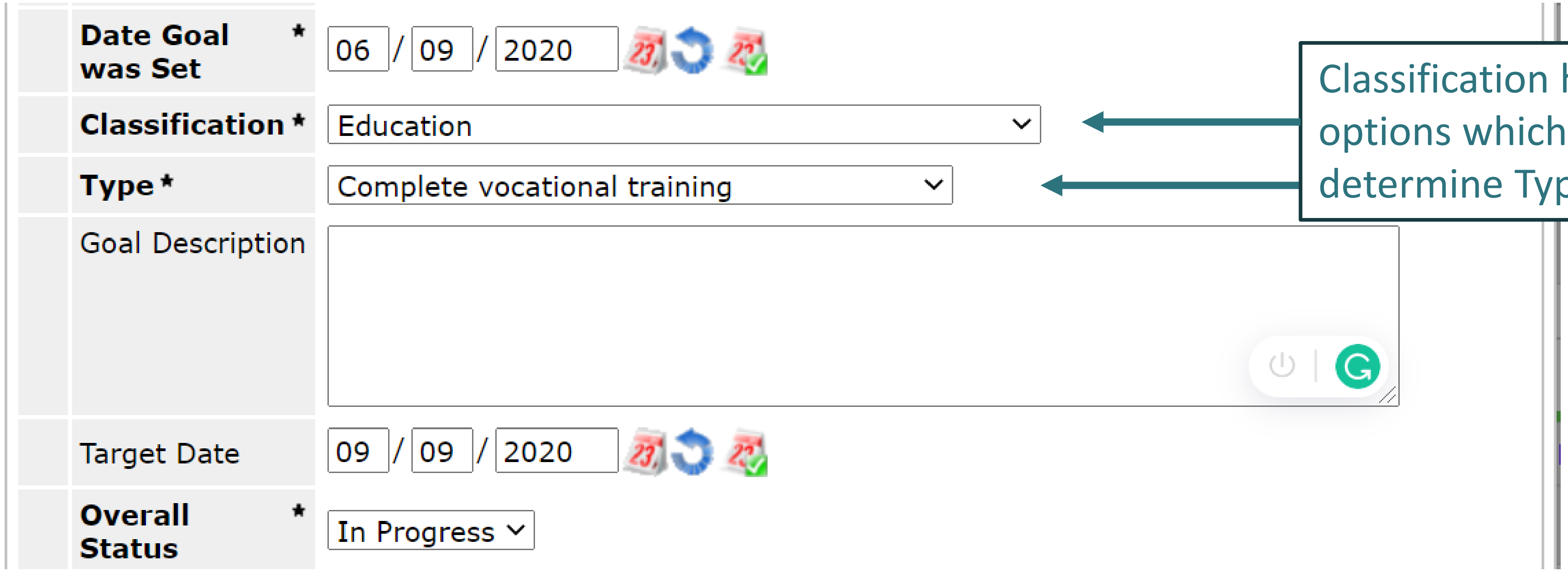
- Add the Case Manager



NCCEH

Filling in the Case Goal

- Fill in the sections about the Goal itself
  - Classification and Type work together as a broad and then detailed goal
  - Target Date is the date the goal is to be completed

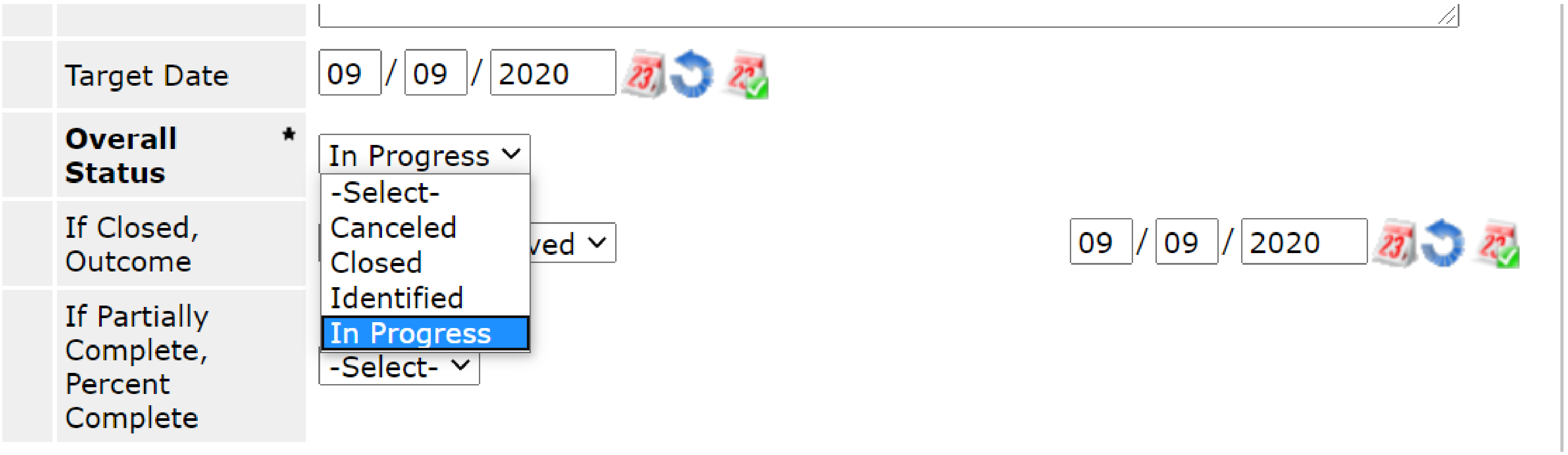

Date Goal was Set *	06 / 09 / 2020
Classification *	Education
Type *	Complete vocational training
Goal Description	
Target Date	09 / 09 / 2020
Overall Status *	In Progress

Classification has a variety of options which then determine Types available

NCCEH

Filling in the Case Goal

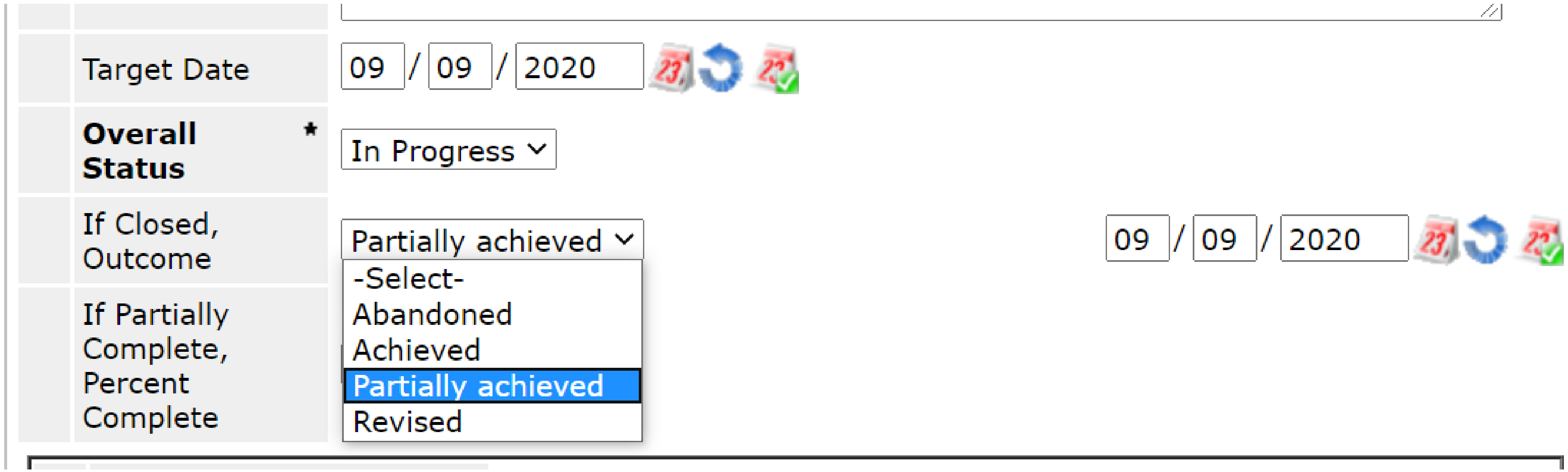
- Fill in the sections about the goal's timeline
  - While working on the goal, the status should be 'In Progress'
  - Updates can be made close to the Target Date
  - Works with Outcome



NCCEH

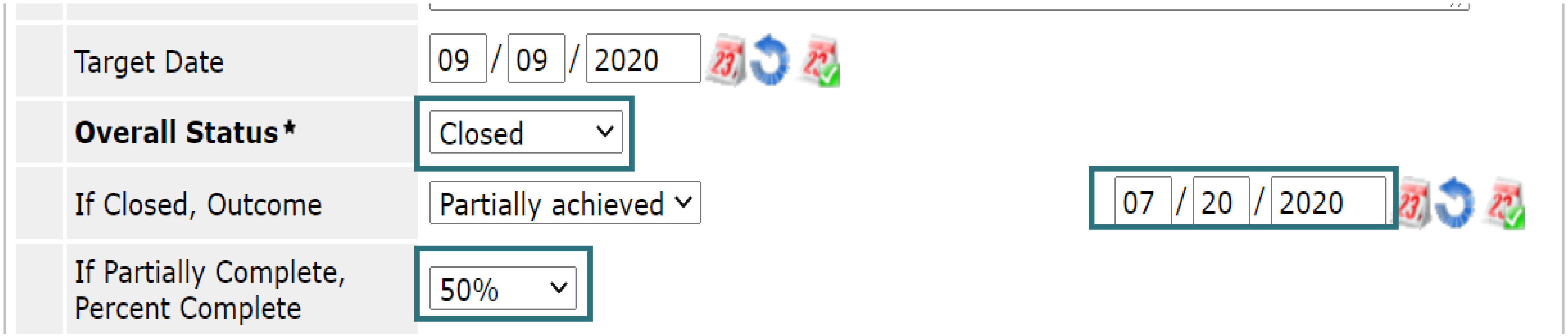
Filling in the Case Goal

- Fill in the sections about the goal's timeline
  - Chose what the outcome is when Overall Status is Closed



Filling in the Case Goal

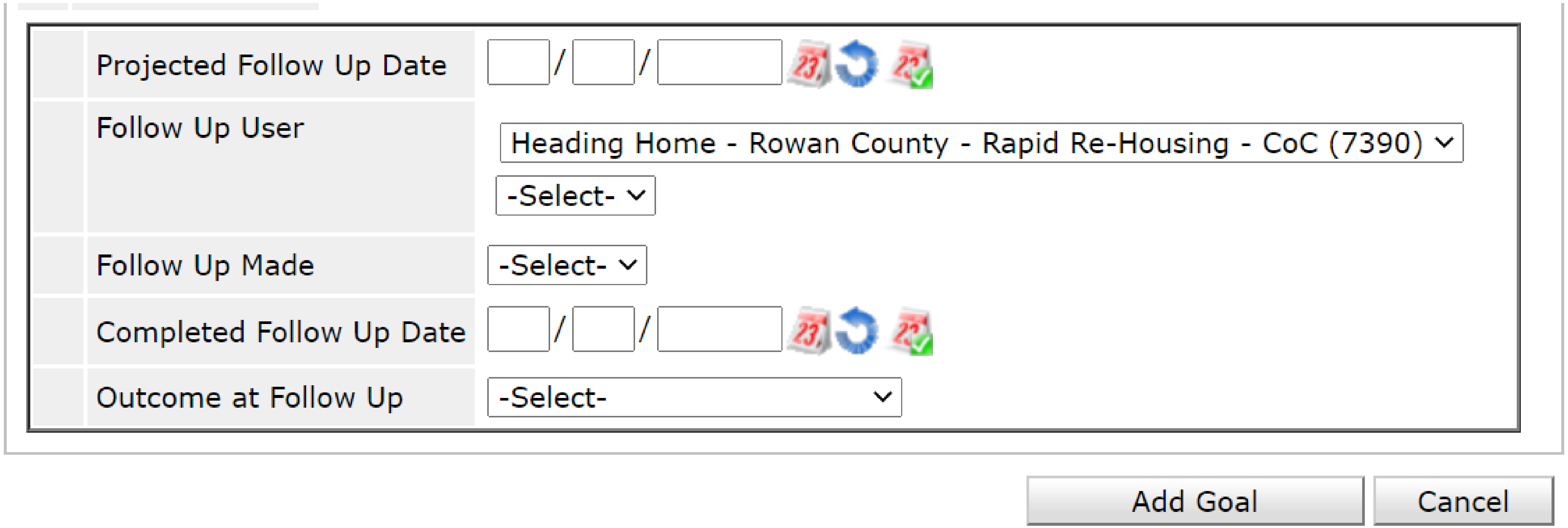
- Fill in the sections about the goal's timeline
  - If outcome was 'Partially achieved', add a 'Percent Complete'



NCCEH

Filling in the Case Goal

- Fill in the sections about the goal's timeline
  - Follow Up Date, agreed on with the client
  - Update status
  - Click Add Goal

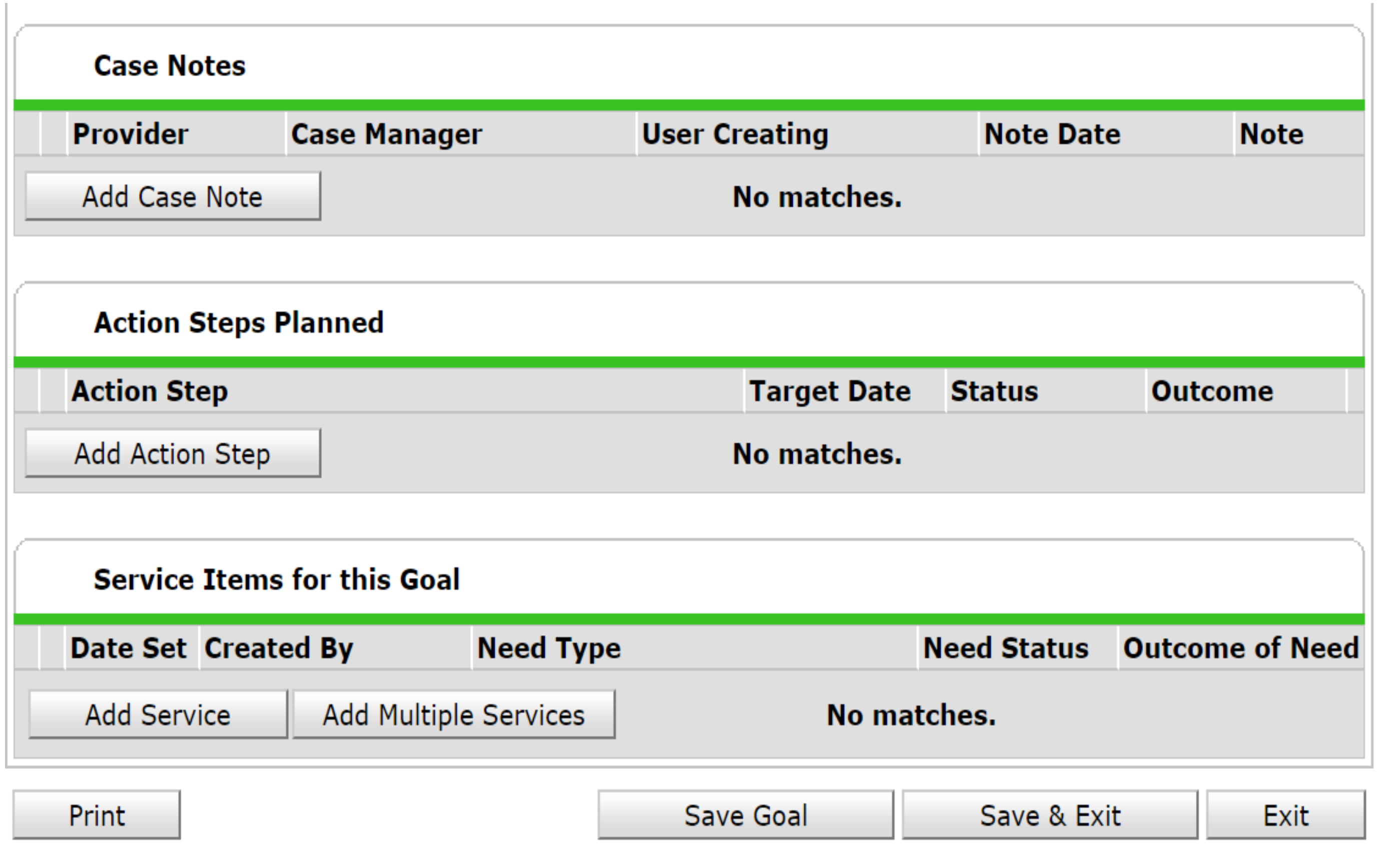


NCCEH

How to add additional Notes and Goals

After Add Goal is clicked three options are presented:

- Case Notes
- Action Steps
- Service Transaction

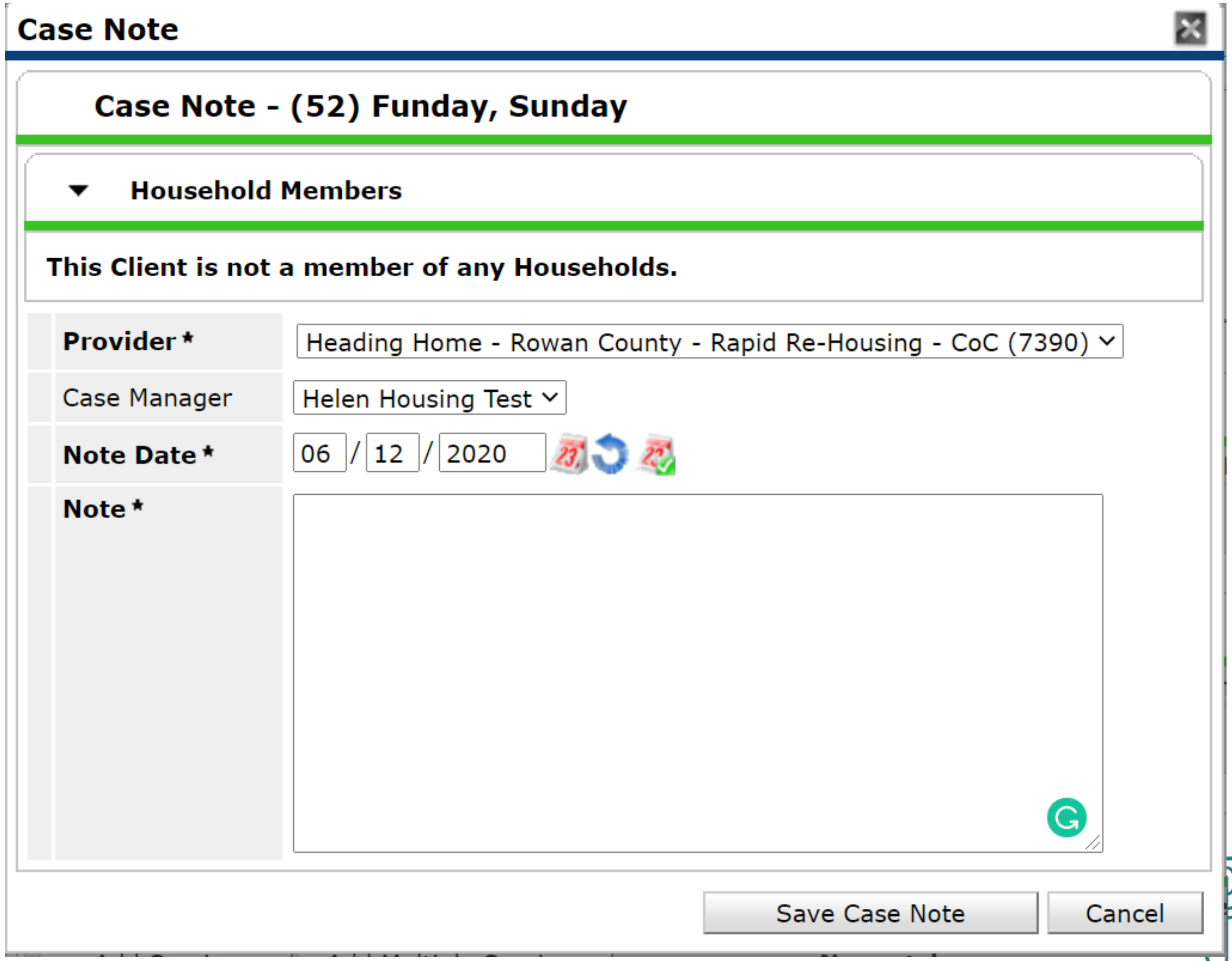


NCCEH

How to add Case Notes

Click Add a Case Note

- Note Date Auto-populates
- Add your Note
- Save Case Notes



How to add Case Notes

After Case Note is saved:

- Shows Date, Note, and Case Manager’s Name

Case Notes

		Provider	Case Manager	User Creating	Note Date	Note
		Heading Home - Rowan County - Rapid Re-Housing - CoC	Helen Housing Test	Andy Phillips	06/12/2020	This is a test note!

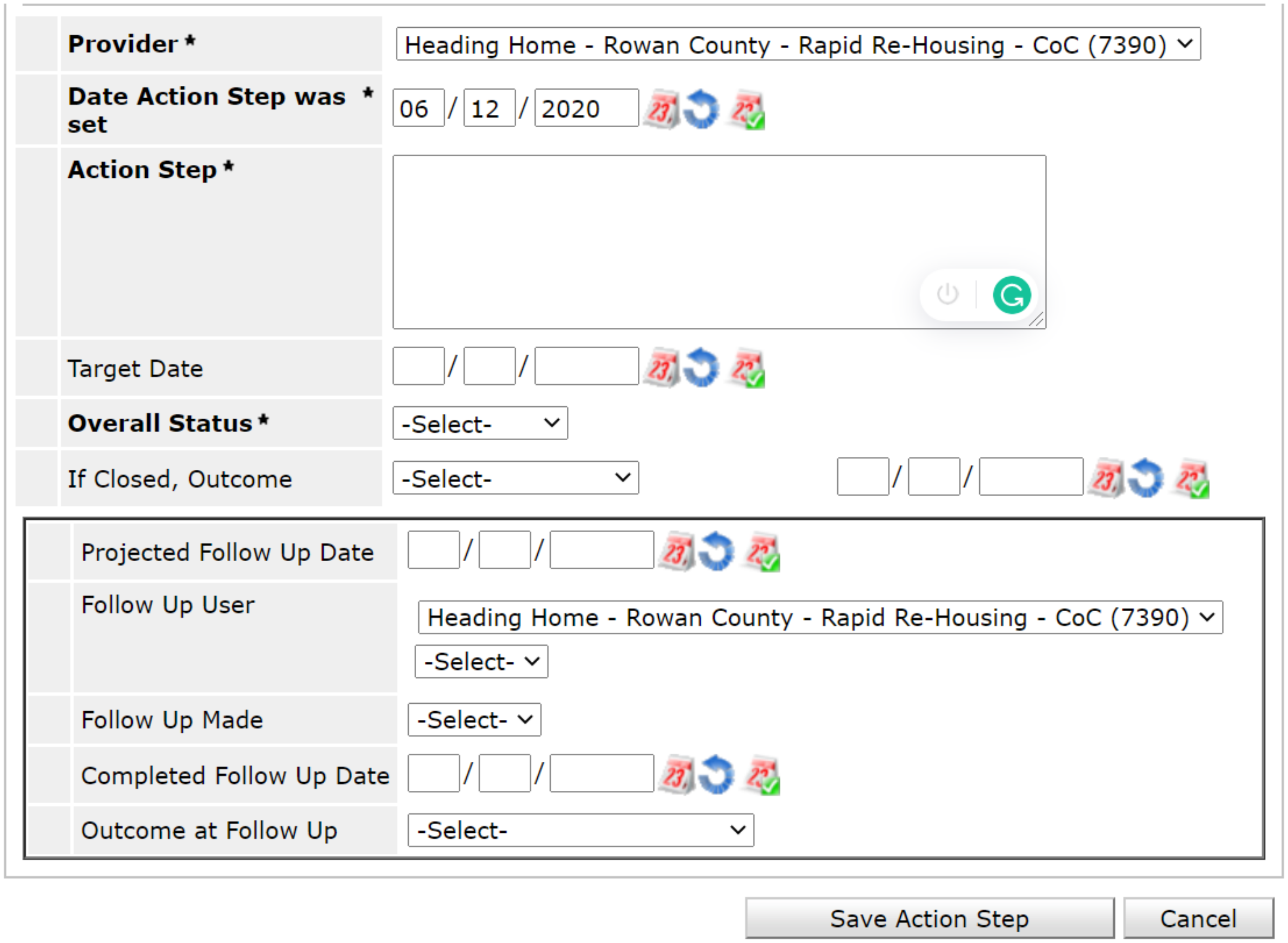
Add Case Note

Showing 1-1 of 1

NCCEH

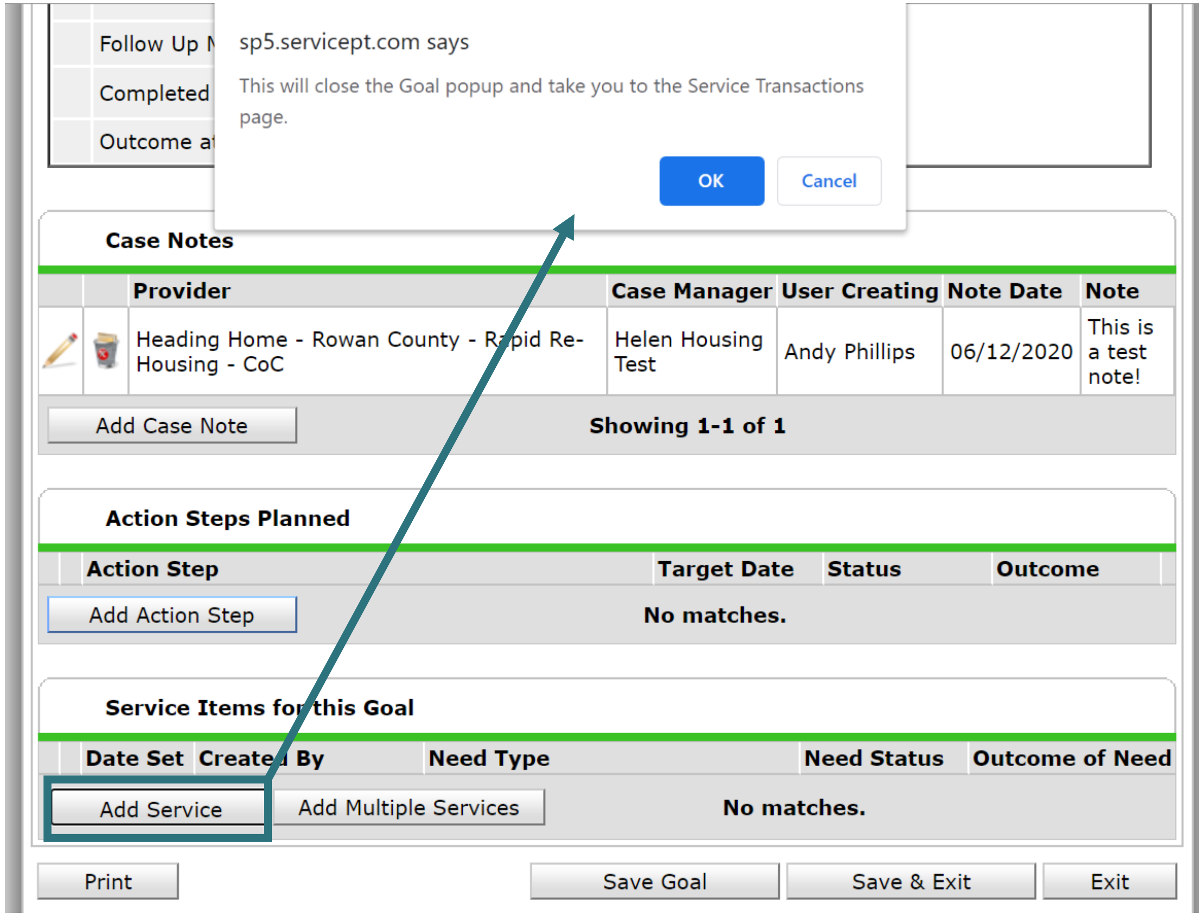
Add an Action Step

- Similar to the original Goal
- Used as a detail to the Goal
- Fill out in the same way



Add Service Transaction

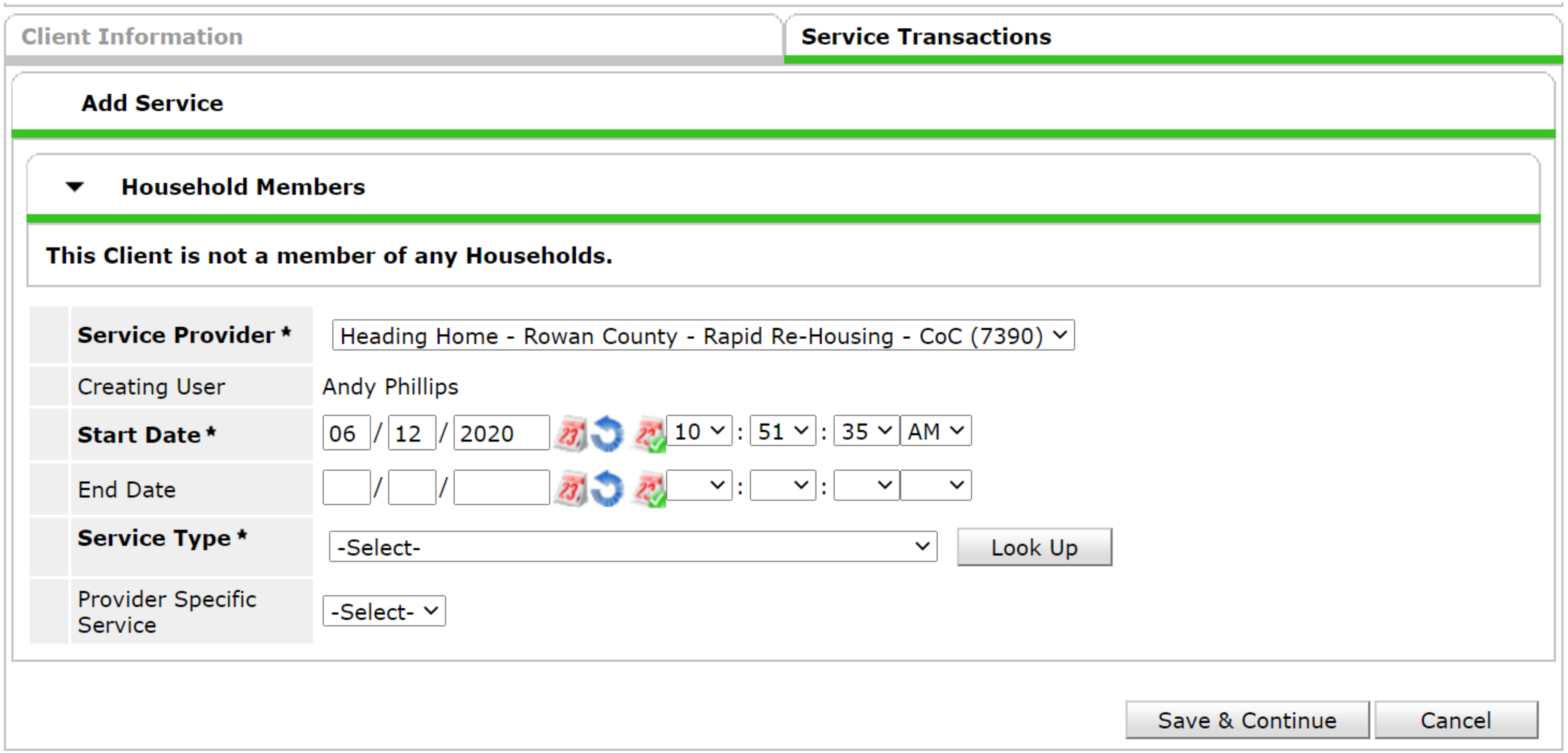
- Add Service
- Click ‘OK’



NCCEH

Add Service Transaction

- Brought over to Service Transaction tab
- Create the Service



NCCEH

Add Service Transaction

- Once completed, it will list under Service Transactions
- Navigate back to the Case Plans tab

All Service Transactions

Select Dates	Start Date	End Date	
-Select-	/ /	/ /	Search

				Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
				Need	06/12/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management	Identified / Fully Met	Education / Complete vocational training
				Service	06/12/2020	Heading Home - Rowan County - Rapid Re-Housing - CoC	Case/Care Management		

Showing 1-1 of 1

NCCEH

Save and Exit from the Goal

- Once completed, it will list under Service Transactions

Case Notes

		Provider	Case Manager	User Creating	Note Date	Note
		Heading Home - Rowan County - Rapid Re-Housing - CoC	Helen Housing Test	Andy Phillips	06/12/2020	This is a test note!

Add Case Note | **Showing 1-1 of 1**

Action Steps Planned

	Action Step	Target Date	Status	Outcome

Add Action Step | **No matches.**

Service Items for this Goal

		Date Set	Created By	Need Type	Need Status	Outcome of Need
		06/12/2020	Andy Phillips	Case/Care Management	Identified	Fully Met

Add Service | Add Multiple Services | **Showing 1-1 of 1**

Print | Save Goal | Save & Exit | Exit

NCCEH

Finished Case Goal

- A created goal will have the Classification, Type, Dates, and number of Notes

Goals

		Classification	Type	Date Added	Date Set ▼	Notes	Latest Note Date	
		Education	Complete vocational training	06/09/2020	06/09/2020	1	06/12/2020	

Add Goal   **Showing 1-1 of 1**

NCCEH

ART Report: 0404 – Client Case Plans

Purpose of Report

- View multiple client’s Case Plans at Once
- Track their Case Notes
- Overall Goals
- Group Statistics

ART Report: 0404 – Client Case Plans

Tab A – Results:

- Shows Case Manager
- Demographics
- Goal Date Set
- Overall View of History

Solo , Han #4

Date of Birth :	5/4/1978
Current Age :	42
Soc Sec # :	123-45-6789
Currently Enrolled :	Yes

Case Manager History

no case manager history

Enrollment History

Heading Home - Rowan County - Emergency Shelter(7389)	1/26/2019 to 4/10/2020
Heading Home - Rowan County - Emergency Shelter(7389)	1/26/2019 to 3/26/2019
Heading Home - Rowan County - Emergency Shelter(7389)	8/21/2018 to present

Infraction History

no infraction history

Goal Date Set: 10/17/19

Classification	Goal Type	Target Date	Status	Outcome	Outcome Date
Education	Get GED		Identified		

Action Steps: no

Casenotes: none

NCCEH

ART Report: 0404 – Client Case Plans

- Tab B – Casenotes Only:
  - Case Note Creator
  - Date of Note
  - Note itself

#

Casenote Provider:

Casenote User	Casenote Date	Casenote Note

ART Report: 0404 – Client Case Plans

- Tab C – Goal Totals:
  - Total Goal Records
  - Total Client Count
  - Clients per counts

Goal Provider: Heading Home - Rowan County - Emergency Shelter(7389)

Total Goal Record Count	Total Client Count
1	1

Goal Classification	Goal Type	Goal Status	Goal Outcome	Goal Record Count	Client Count
Education	Get GED	Identified	Not Applicable	1	1

NCCEH

ART Report: 0404 – Client Case Plans

- Tab D – Statistics:
  - For whole agency
  - Breaks down five different types

Provider: **Heading Home - Rowan County - Emergency Shelter(7389)**

Record Type	Record Count	Client Count	Percentage of Clients with Records
Goals	1	1	100.00%
Case Notes	0	0	0.00%
Actionsteps	0	0	0.00%
Case Managers	0	0	0.00%
Infractions	0	0	0.00%

NCCEH

End of Quarter Reports

2nd Quarter of 2020 is ending

NCCEH Data Center recommends that all projects take some time to review this quarter’s data.

- Does it make sense?
- Are there positive outcomes to celebrate?
- How does data quality look?

NCCEH

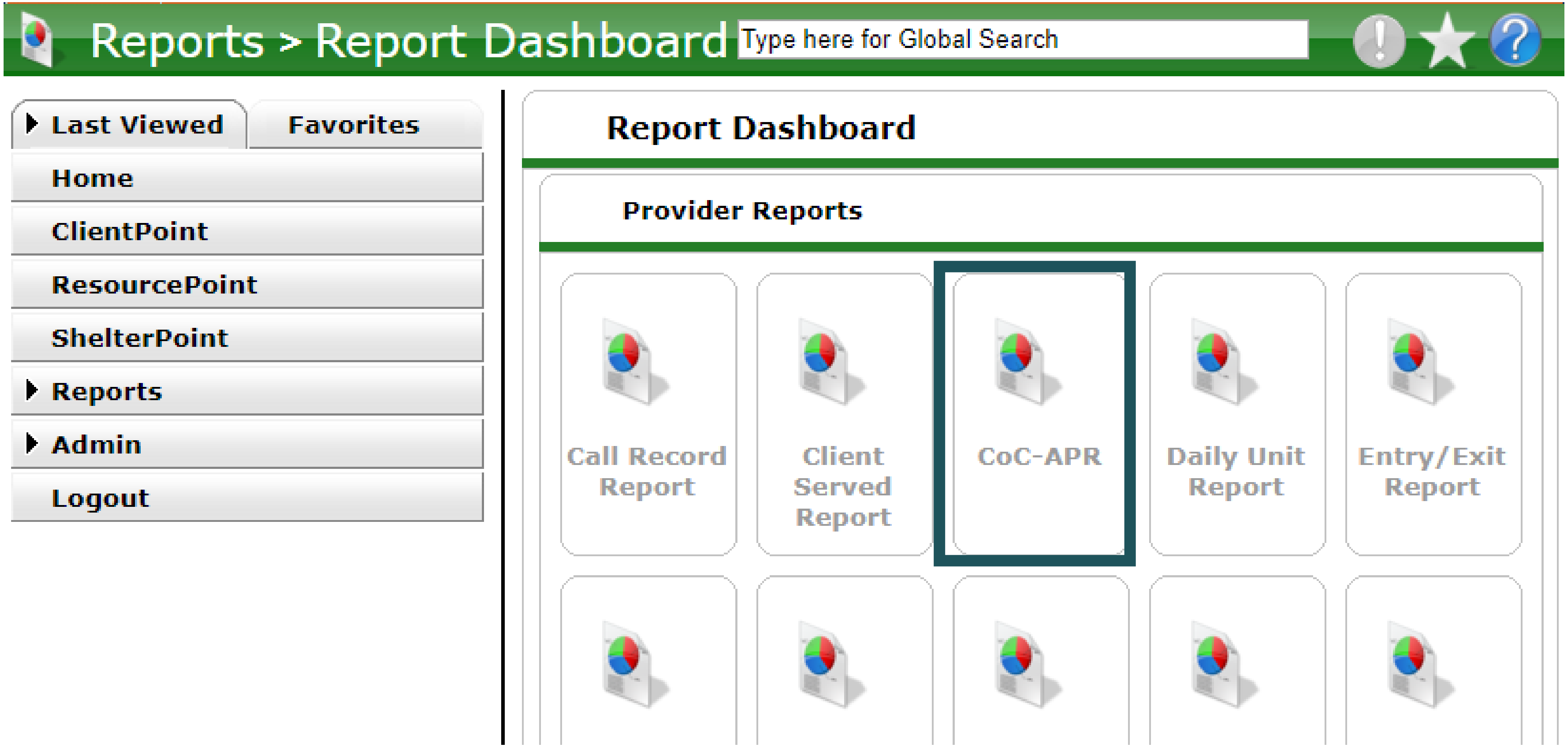
Use the right EDA mode

Used accurate EDA mode

Default EDA isn't the project I want

Left-side Menu: Reports

Find fast reports here



NCCEH

Run the Report

What's Next?

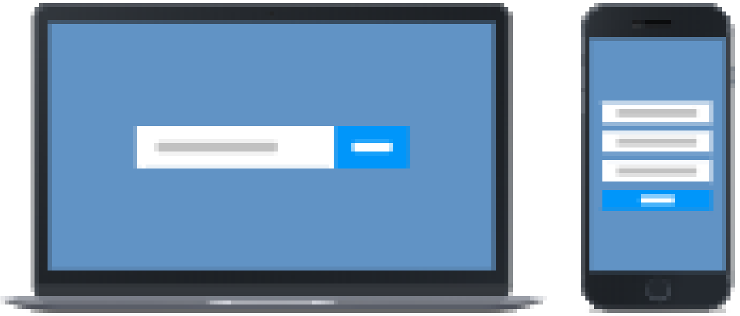
What's Next Calendar

Due	Report/Event Name
Mar 10th	NC State of Emergency for COVID-19
Mar 18th	COVID-19 Response questions in HMIS
July 16th	Next NC BoS CoC HMIS Users Meeting
Aug/Sept	Longitudinal System Analysis Report
Oct 1st	New CE Elements required in HMIS
	First quarterly ESG-CV reports anticipated deadline

NCCEH

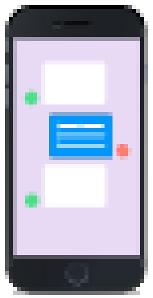
Poll: Next HMIS Users Meeting Topics

Join by Web



1. Go to **PollEv.com**
2. Enter **ANDREACAREY147**
3. Respond to activity

Join by Text



1. Text **ANDREACAREY147** to **22333**
2. Text in your message

NCCEH

Contact NCCEH

hello@ncceh.org
919.755.4393

Contact NCCEH Data Center Help Desk

hmis@ncceh.org
919.410.6997

NCEndHomelessness
@NCHomelessness
nc_end_homelessness

NCCEH