Mahoning HMIS Visibility Technical Overview

December 5, 2016

Ohio BoSCoC
Ending homelessness.
Together.

Important Dates

- Visibility will open Dec 16, 2016
- Hard deadline for clean-up March 1, 2017
- Soft deadlines are agency specific and come from
  - APR Due Dates
  - Grant Applications
  - Monitoring visits
  - Regional planning

What does visibility mean?

- Visibility is how HMIS controls how users can see client data
  - In a closed system users can't see any client data entered by any other agency
  - In an open system all users can see all client data for clients in HMIS
- In March 2014 you moved from a mostly closed visibility system to a partially open visibility system. You could see PII Data and then you opened Entry/Exit data from that date forward.
- In December 2016 we are moving to an open system, with all client historical data including long staying current PSH clients.

How is our visibility changing?

- Client assessment data will open between all providers in HMIS:

  This includes Income and Non-Cash Benefits, Disability, Insurance and all other HUD CoC ESG data related to the clients homeless episode

  This will include all current and past clients

- Case notes will *not* open outside of the case manager or agency that entered the notes

Why is it changing? (1)

- **Better Reporting**
  - Agencies that operate multiple projects will be able to run a single report across all projects
  - ODSA and COHHIO can run aggregate reports on multiple (all) HMIS projects in a single report for local and/or HUD reporting requirements
- Less work (once the dust settles)
- Consistency in data

Why is it changing? (2)

- Better Reporting
- **Less work (once the dust settles)**

  – Data entry will take less time. When you open a client record who has been in HMIS in the past you will see everything up until present. All you will have to do it make updates based on the current intake. This is typically the homeless situation, income, non-cash benefits, insurance, disability usually need updated

- Consistency in data

Why is it changing? (3)

- Better Reporting
- Less work (once the dust settles)
- **Consistency in data**

  - There is only one version of the client record and it moves with the client from stay to stay so only the questions that have changed since their last exit need to be updated for the current stay. You still have to complete a full intake, but you may only have to update a few answers in HMIS that have changed.
  - This also means that data quality is a shared responsibility, you are all working on the same client data.

What are the drawbacks to open visibility?

- Loss of data quality immediately after change
- Data clean-up on current/active clients
- Possible maintenance on clients who have been in HMIS previously when they show up for a new stay
  - If you can do Interims then you can do this!

How long will clean up take?

- Clean up will be an on-going process, some parts should only take a few weeks, some parts longer, and one component of the process will always exist:
  - Initially you will have to review the **active clients** in your program to look for unwanted increases in Income, extra non-cash benefits, insurance and disabilities.
  - You will also need to review **past clients** you have served who have exited your projects, going back to January 1st 2015.
  - For all **new clients** that enter the project after December 16, you will just review the incoming record to determine if you need to end old incomes, benefits, etc. that the client no longer maintains.

Clean-up Priority

- Target open clients first
  - Use Current Clients report in As Needed folder (ART)
  - Use Data Quality: Entry/Exit and Assessment report to help spot errors
- Follow-up with cleaning data on clients served back to January 1, 2015

Which records are affected?

- Only Clients with prior/multiple stays
  - Any current client you are serving that has had previous stays in HMIS
  - Any clients you served back to January 1, 2015 that had a previous stay in HMIS before your recorded stay
  - Any new clients you are serving who have had previous stays in HMIS
- Clients without previous stays **will not** have visibility data to clean up

What data is affected?

- Sub-assessment data
  - Disability
  - Income (including Total Monthly Income)
  - Non-cash Benefits
  - Insurance

Help from Reporting

- You can use the **Current Clients** report to show who is currently in your project
- You will use the **Data Quality: Entry/Exit and Assessment** report to show you which clients have errors in the sub-assessments
  - You will have to wait until 12/19 to start running this report and to start correcting errors

New Reporting Rules

- You will not use the EDA Provider prompt in ART reporting anymore
  – If you continue to run reports with EDA Provider set in ART reports after Dec 19 you will see many false errors
  – This is not the same as using Enter Data As in ServicePoint while doing data entry. You will still use Enter Data As for data entry.

Data Quality Report-Training Video

- There will be a training video available on our HMIS website that shows how to run the new report and use it to help find errors
  - http://hmis.cohhio.org

Sample from Data Quality Report

Missing Income

This report indicates a definite data quality problem.

This report checks for completeness on adults *and children* for program stays that ended prior to October 1, 2014, but only checks for completeness for adults on all other program stays.

For every client record, there are three questions regarding income. The first question asks if the client is receiving income. The second is the client's total monthly income amount. The third is a subassessment where the sources and amounts of income is entered. This report looks at all three questions to determine if they are answered and it looks at whether the answers are in agreement. If the client is receiving income at the time of data collection, the Income from Any Source question should have a Yes, the total monthly income should have a dollar amount, and the subassessment should have a source and dollar amount. If the client is NOT receiving income at Entry, the Income from Any Source should have a No, the total monthly income should be zero, and the subassessment should NOT have a source or dollar amount.

This report is divided into two sections: One for Income at Entry, and one for Income at Exit. To correct missing or questionable data at Entry, be sure you are under Enter Data As the correct provider and click the pencil next to the client's ENTRY Date. To correct missing or questionable data at Exit, be sure you are under Enter D
click the pencil next to the client's EXIT Date.

Missing Income at Entry

Client Id	Entry Date	Exit Date	Receiving Income at Entry?	# of Income Sources	Total Monthly Income from Subs	Subassessment ok at Entry?
	12/1/14	1/10/15	Yes (HUD)	2	1,500	Yes
	12/1/14	1/10/15	No (HUD)	1	772.27	No
	1/12/15	2/24/15	No (HUD)	2	1,300	No
	3/10/15		Yes (HUD)	4	2,140	Yes
	2/4/15	3/17/15	Yes (HUD)	2	321.8	Yes
				Clients with missing or questionable inc		

Missing Income at Exit

Client Id	Exit Date	Receiving Income at Exit?	# of Income Sources	Total Monthly Income in Subs	Subassessment ok at Exit?	Total Mo Income Quality	Amount
	1/10/15	No (HUD)	1	772.27	No	ok	0
						Clients with missing or questionable income data at Exit:	1

Missing Income at Entry

Client Id	Entry Date	Exit Date	Receiving Income at Entry?	# of Income Sources	Total Monthly Income from Subs	Subassessment ok at Entry?	Total Monthly Income Data Quality	Total Monthly Income
	12/1/14	1/10/15	Yes (HUD)	2	1,500	Yes	ok	513
	12/1/14	1/10/15	No (HUD)	1	772.27	No	ok	0
	1/12/15	2/24/15	No (HUD)	2	1,300	No	ok	0
	3/10/15		Yes (HUD)	4	2,140	Yes	ok	733
	2/4/15	3/17/15	Yes (HUD)	2	321.8	Yes	ok	164
							Clients with missing or questionable income data at Entry:	5

Missing Income at Exit

Tools and tips to find errors

- Use Data Quality report starting April 20
- Sort sub-assessment list for Yes records and double-check dates
- End Incomes, Benefits, Disabilities that are old and conflict with new information
- Check incomes that you know are Yes and find old No records and end date them when they conflict
- Use View Gross Income button to tally active income records
- This is just like doing Interims, same rules, same concept. Its just at Entry instead of an Interim Date

Concurrent program stay concerns

- In some cases there will be cases where clients have a stay in a shelter (ES) and also a Rapid Rehousing project at the same time

- They will show up with two open project entry lines
  - Since there is a single version of the client record as of December 16, the RRH may need to update income at entry under the above mentioned methods while the client is still in the shelter
  - Shelter users may notice that client data has changed during the stay by the RRH agency
  - This should not affect your 'at Entry' data, it will appear similar to an Interim
  - In most cases it will be a positive change and it reflects the actual activity for the client so it should not be reversed

Wrap Up

- Visibility opens December 16
- Start working on clean up December 19
- If you have questions call email or attend labs
  - http://hmis.cohhio.org