NON-PATH STREET OUTREACH GUIDE FOR HMIS USERS

Rhode Island Coalition for the Homeless

This brief guide will walk you through the work flow and universal/program specific data elements that are required for all non-PATH Street Outreach Staff that use RI-HMIS.

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TABLE OF CONTENTS

I. DEFINITIONS

All below definitions were obtained from the HMIS Data Standards Dictionary Version 1.3 and the Emergency Solutions Grant Program (ESG) HMIS Program Manual Version 3.

- **HMIS Universal Data Elements -** are elements required to be collected by all projects using the software as an HMIS. Projects funded by any one or more of the federal partners must collect the Universal Data Elements, as do projects that are not funded by any federal partner (e.g. missions) but are entering data as part of the Continuum of Care's HMIS implementation. Universal data elements enable the HMIS the ability to record unique, unduplicated client records, establish participation in a project within a date range, and identify clients who meet time criteria for chronic homelessness.

- **HMIS Program Specific Data Elements** - To meet the statutory and regulatory requirements of federally funded programs using HMIS, additional elements are required for different funding sources. The Program Specific Data Elements are elements that are designed and managed by at least one of the HMIS federal partner programs. Due to the nature of street outreach, these data elements are not expected to be fully in the system until client engagement has occurred (see Date of Engagement definition for more information).

- **3.10. Project Start Date** - was formerly named "Project Entry Date" prior to 10/2017. For street outreach projects, this is the date of first contact with the client. A Date of Contact should be recorded as the same date as the program Project Start Date for any client.

- **Interim Update –** An interim update is required to be entered into HMIS each time a client contact is made. At each client contact, staff should attempt to obtain their clients' income, noncash benefit and health insurance information to report changes if necessary, as each interim update gives the HMIS user a chance to update this information.

- **4.12 Date of Contact** – This data element is collected at multiple points during a clients' entry in an outreach program; each time there is a contact with a client, a record of contact must be recorded which includes the date of contact as well as the clients' present homelessness status. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts may include activities such as a conversation about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A contact must be recorded anytime a client is met, including when an engagement date or project start date is recorded on the same day. Each contact should be recorded through an 'Interim *update*' of an already OPEN Project Start Date.

- **4.13 Date of Engagement** – Per the HMIS Data Standards and by agreement across all federal partners, an engagement date is the date when an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. This date may be on or after the project start date and must be prior to project exit. If the client exits without becoming engaged, the engagement date should be left blank. If contact was made with the client the date they became engaged, a date of contact should *also* be recorded.

- **Annual Assessments -** Data collection must include an annual assessment for all persons in the project one year or more. Data elements required for collection at annual assessment must be entered with an Information Date of no more than 30 days before or after the one-year anniversary of the head of household's Project Start Date, regardless of the date of the most recent 'update' or any other 'annual assessment.'

- **3.11. Project Exit Date** – For street outreach projects, this indicates that a client has left the project. This could be if the client has transitioned to another project (e.g., TH or PSH) or otherwise found housing, is engaged with another outreach worker or project, is deceased, the outreach worker has been unable to locate the client for over 90 days and there are no recorded dates of contact within the last 90 days. *(Note: if a client is exited due to no contact/services in 90 days, their exit date should be their last date of contact.)*

II. SPECIAL DATA COLLECTION NOTICES FOR ESG-STREET OUTREACH PROJECTS

- Housing and Urban Development (HUD) recognizes that there are **data collection challenges** for Street Outreach Providers:
  - A street outreach project is likely to encounter difficulty engaging homeless persons.
  - Street outreach projects may record a project start with limited information about the client and improve on the accuracy and completeness of client data over time by editing data in an HMIS as they engage the client.
  - The initial entry may be as basic as the project entry date, a "made-up" name (e.g., "Redhat Tenthstreetbridge") that would be identifiable for retrieval by the worker in the system, and gender. However, Street Outreach projects are prohibited from establishing protocols that only require outreach workers to collect minimal client data.
  - Over time, outreach workers must attempt to *collect all data required for street outreach* projects and edit recorded data for accuracy (e.g., replacing "Redhat" with "Robert") as the worker learns more about the client.

- **Avoiding the De-Duplication of Client Records** for those involved with Street Outreach:
  - It is possible in a street outreach setting that a single client may be contacted by multiple street outreach workers over a period of time in different locations. Local protocols should be established to determine how coordination among street outreach projects effectively manage the identification and data collection of clients.
  - In a smaller CoC, it may be possible to coordinate street outreach efforts and reduce duplication of client records through case conferences or other efforts to coordinate outreach services.
  - The use of temporary "made-up" names should not be an excuse for excessive de-identified clients or poor data quality. Street Outreach projects and local HMIS leadership should work together to minimize the use of "made-up" names and attain high data quality

- The importance of the **Date of Engagement** for those served in Street Outreach and for the program to maintain high data quality:
  - Reporting to HUD on data quality for street outreach projects is limited to clients with a date of engagement.
  - Therefore, it is important that outreach workers record the engagement date and also review all of the Universal Data Elements and applicable Program Specific Data Elements for completeness and accuracy.
  - The Date of Engagement coincides with the requirement for HMIS data quality, therefore all Universal Data Elements should be entered into HMIS at or before the Date of Engagement.

III. UNIVERSAL DATA ELEMENTS

For Street Outreach, these data elements are required at *Project Start Date,* if not possible, case manager should work on obtaining this information as soon as possible.

- 3.1 Name
- 3.2 Social Security Number
- 3.3 Date of Birth
- 3.4 Race
- 3.5 Ethnicity
- 3.6 Gender
- 3.7 Veteran Status
- 3.8 Disabling Condition*
- 3.10 Project Start Date
- 3.11 Project Exit Date
- 3.12 Destination
- 3.15 Relationship to Head of Household
- 3.16 Client Location
- 3.20 Housing Move-In Date
- 3.917 Living Situation*

Note: Many of these Universal Data Elements comprise basic demographics of a client which are critical to an HMIS's client search functionality and ability to unduplicate client records. Data quality is checked and reported on many basic demographic elements.

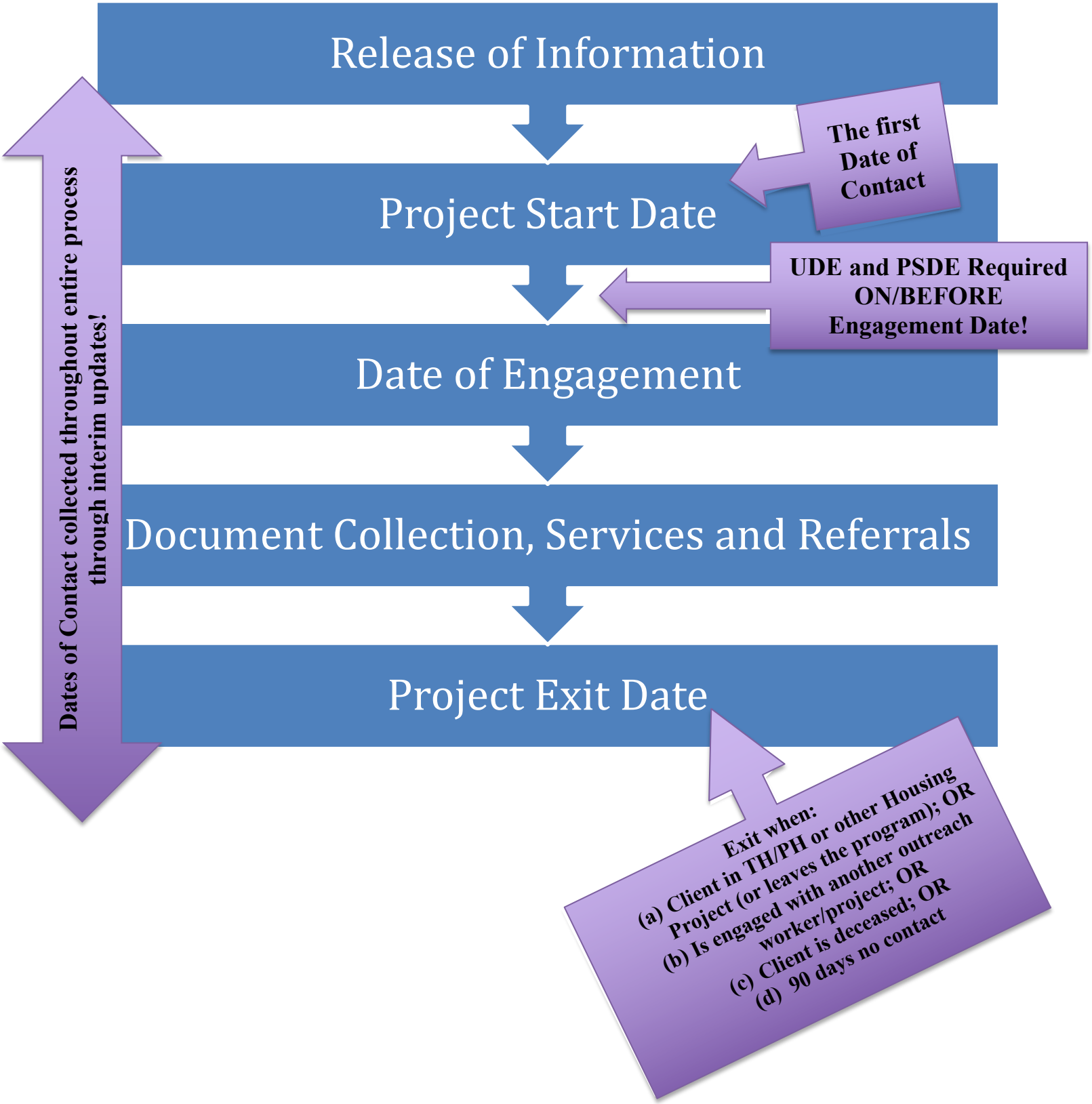
*These two data elements are required to identify a client as chronically homeless: Disabling Condition and Living Situation. Because street outreach projects are critical in the identification of chronic homeless person's – these data elements are important to pay attention to in any clients' record.

IV. HMIS PROGRAM SPECIFIC DATA ELEMENTS (PSDE)

For Street Outreach, these data elements are required as soon as possible at *Project Start Date*, but **must** be completed prior to date of engagement.

- 4.2 Income and Sources
- 4.3 Non-Cash Benefits
- 4.4 Health Insurance
- 4.5 Physical Disability
- 4.6 Developmental Disability
- 4.7 Chronic Health Condition
- 4.8 HIV/AIDS
- 4.9 Mental Health Problem
- 4.10 Substance Abuse
- 4.11 Domestic Violence
- 4.12 Date of Contact
- 4.13 Date of Engagement

V. HMIS BASIC STREET OUTREACH WORKFLOW

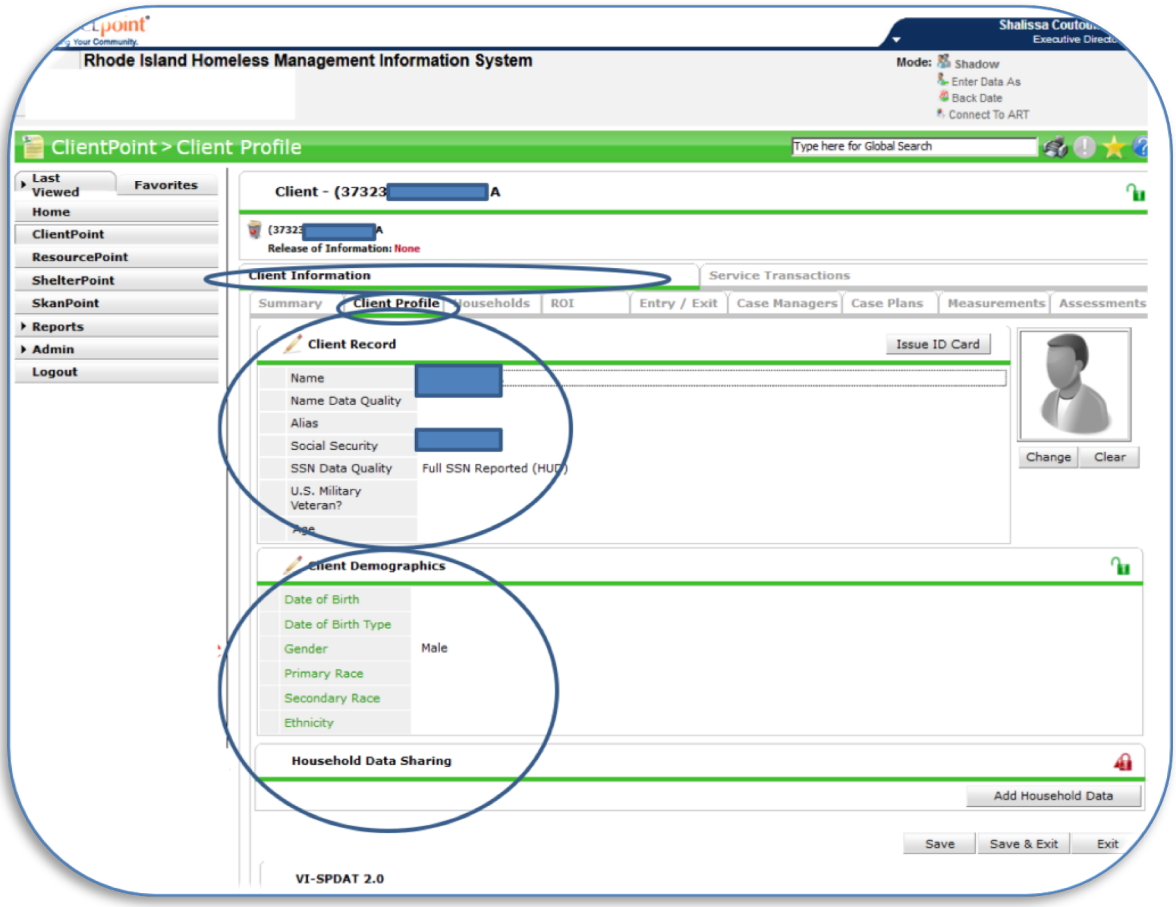


VI. HMIS STREET OUTREACH DETAILED WORKFLOW WITH SCREEN SHOTS

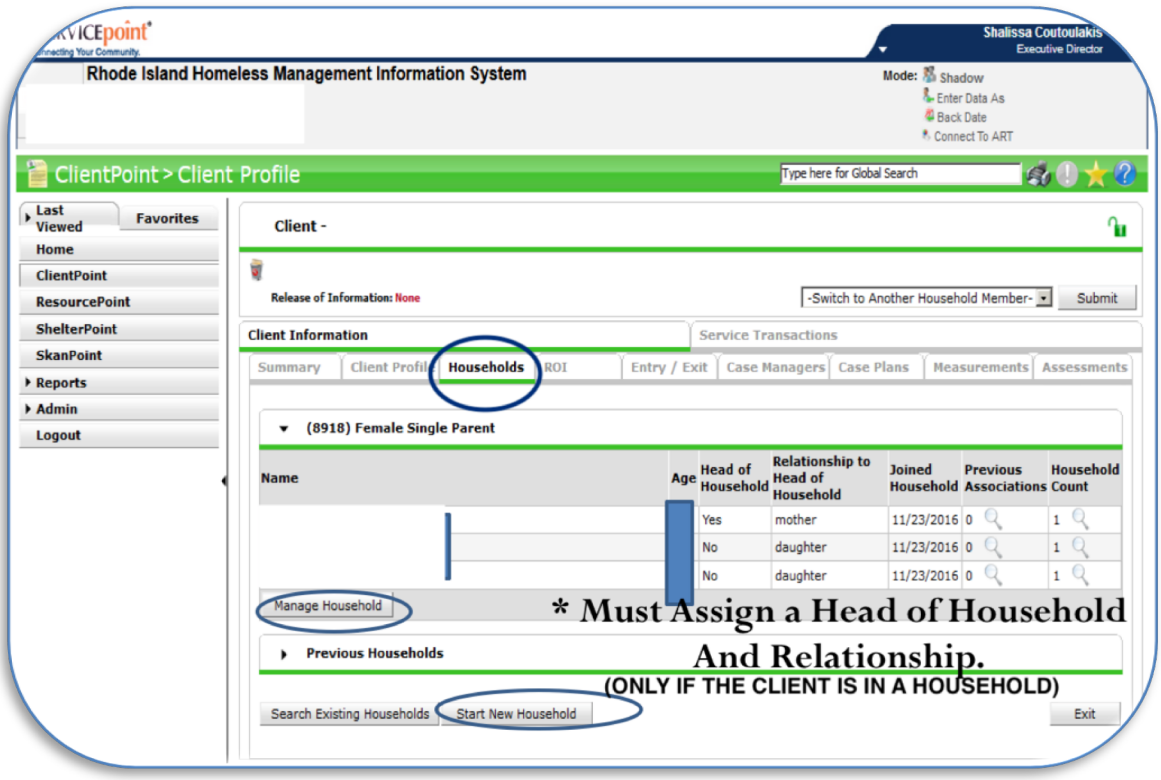
a. STEPS TO TAKE WHEN ENTERING A CLIENT NEW TO YOUR PROGRAM

1) In **Client Point**, search for your client by name, alias and social security number individually to ensure the client is not already in the system. If they are already in the system, go to their client profile by clicking on their name in the search bar. If they are not in the system already, add them to the system. *(Use Back Date Mode only if you are entering the client into the system for a date in the past.)*

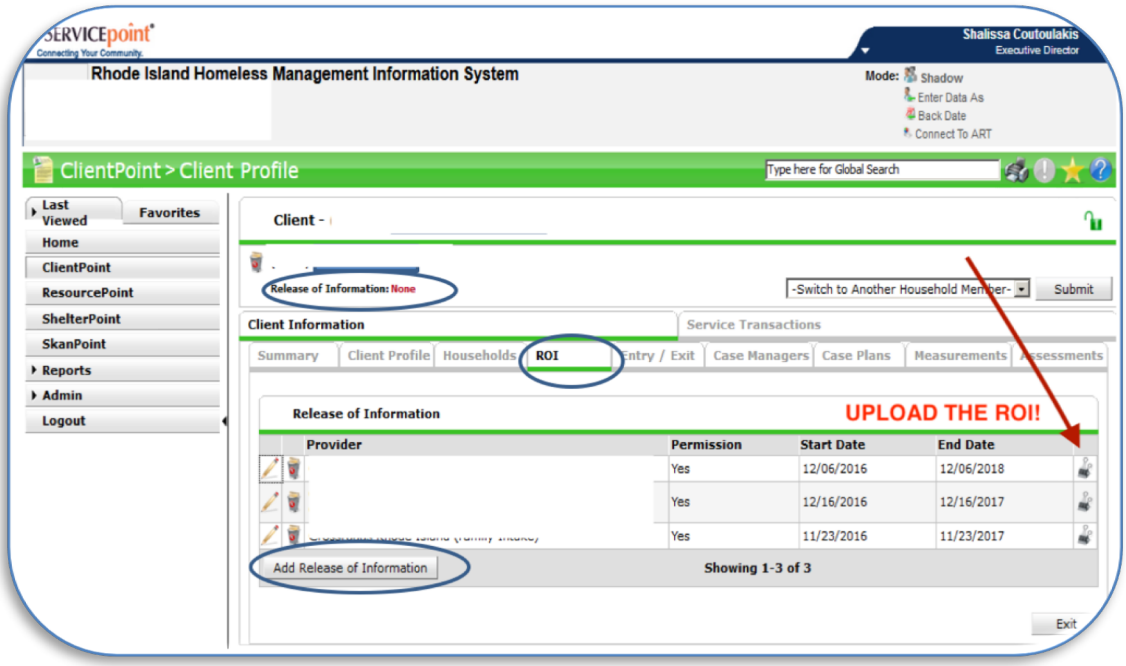
2) Once in the client record, ensure all **Client Profile** information is accurate, these are UNIVERSAL DATA ELEMENTS.



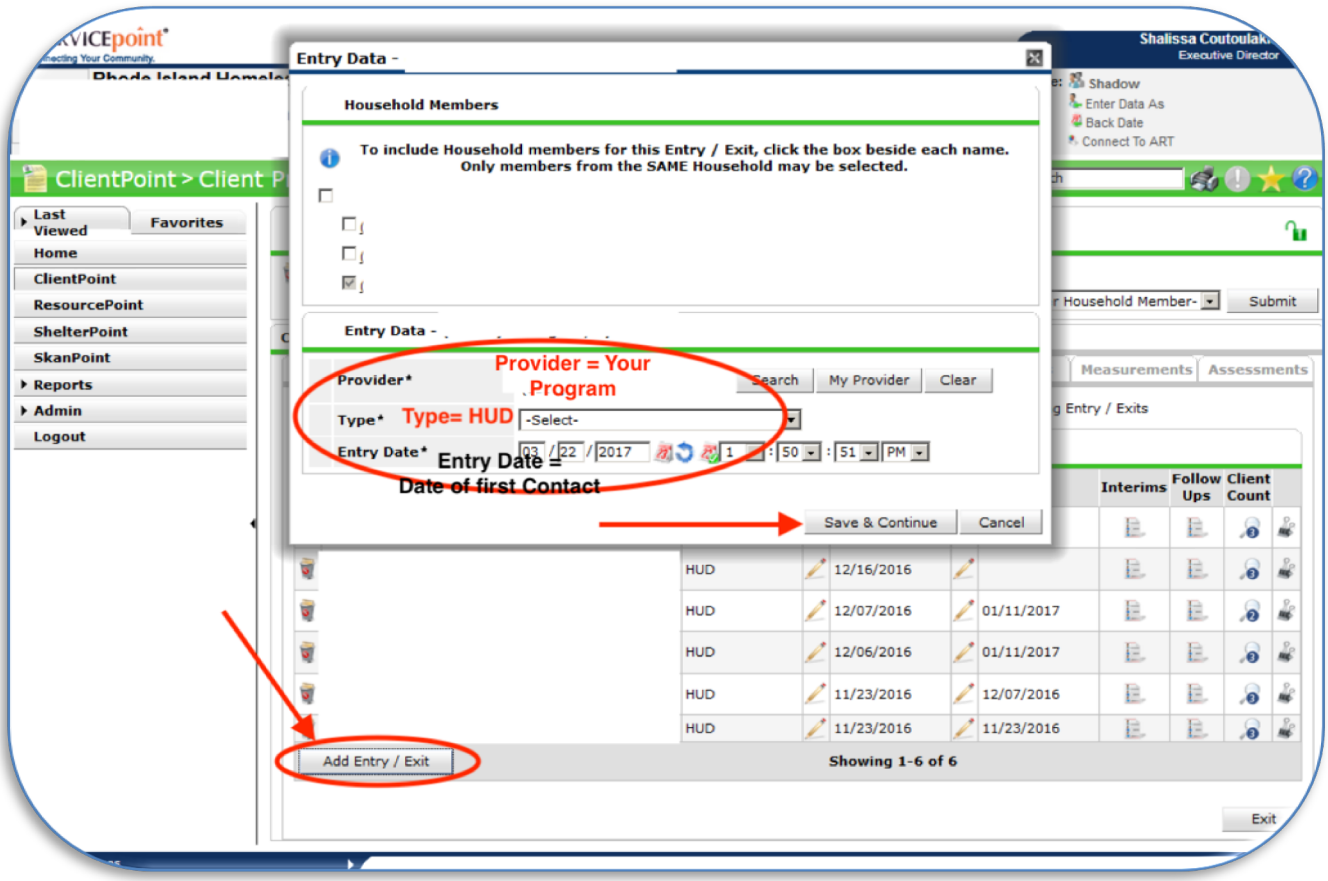
3) Ensure the **Households Tab** is accurate and reflects your clients current household situation. If you need to Manage the Household, you may do that here! There should ONLY be ONE household per client, call the RI-HMIS team if you see otherwise. If your client is not in a household but should be, select 'Start New Household'. If there is a household, ONE person MUST be assigned Head of Household and *everyone* in the household needs to have a relationship assigned.



4) A release of information (ROI) must be entered into HMIS when the client gives consent. Click on the **ROI** tab to add a release. If the client already has a valid ROI for YOUR program, then you do not need to add another. If not, add an ROI for your street outreach program with an expiration of 2 years. It is important the ROI is uploaded into HMIS. You can do this by clicking on the paperclip after you add your ROI digitally; You can attach your ROI in PDF format here (red arrow).

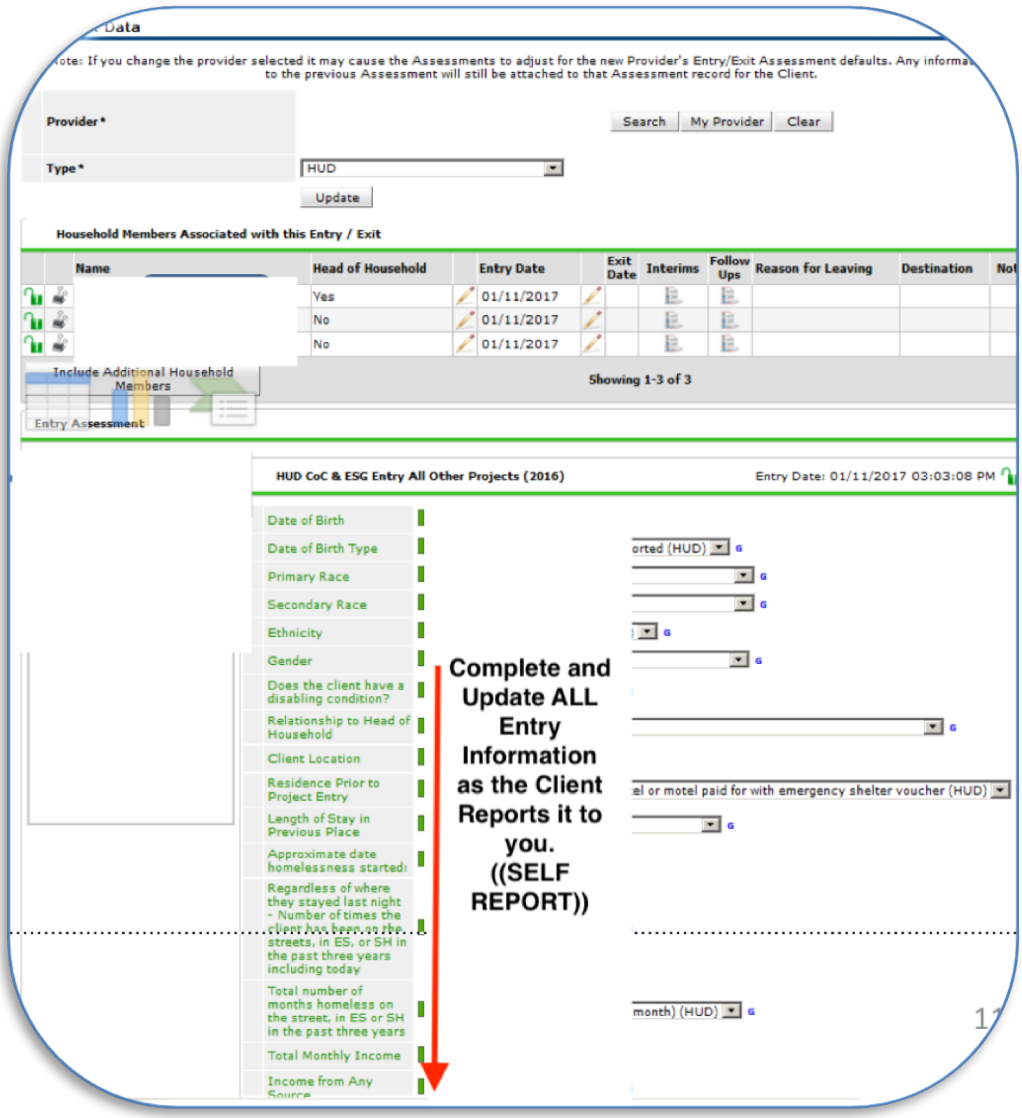


5) Before you add an Entry to your program through the **Entry/Exit** tab, make sure your project does not already have an open entry. Click on the Entry/Exit tab. If your client does not already have an open entry to your street outreach program, select '**Add Entry/Exit**.' On the next screen that pops up, check of the clients you are working with (if more then one), make sure you are Entering Data As the correct provider/bin, enter in **the date of first contact for the Entry Date** and select project type as **HUD**. Click '**Save and Continue.'**



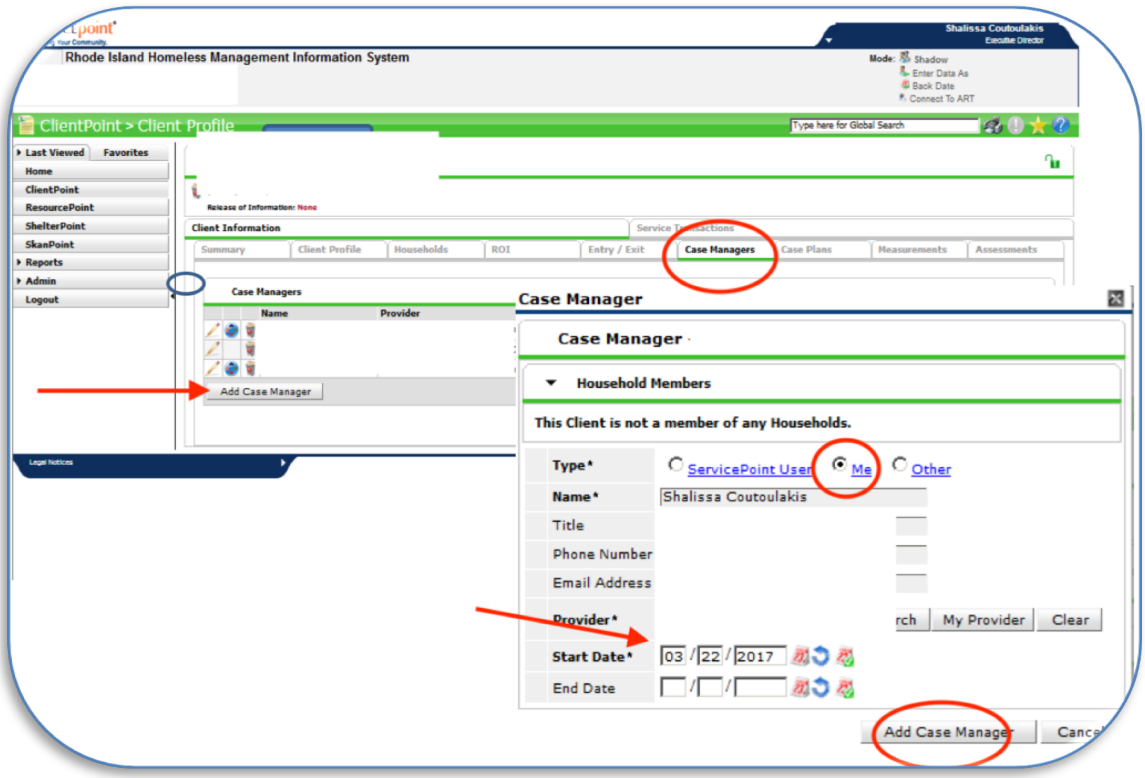
6) Complete the HUD entry for this client. . For a clients entry, you will need to UPDATE their: Disability Status; Relationship to HOH; Residence Prior to Project Entry; How long at residence prior; Number of times/months homeless in past 3 years; Income amount and source; Noncash benefit amount and source; Insurance and source; Disability information - type and severity; DV Information.

   a. You will also need to record the Date of Contact (with the same start/end date and where the client is staying), as well as the Date of Engagement (only IF client engaged same day as first contact).
   b. *The attached HMIS Entry Form for Street Outreach and the Contact form will aide in collecting these data elements.*



Date of Contact[1]	Staying on the Streets, in an Emergency Shelter, or in a Safe Haven?	Is this the Client's Date of Engagement?[2] (select only once)	Is this the Client's Exit Date?[3] (select only once)
(Project Start Date)	☐ Yes ☐ No ☐ Unable to determine	☐	☐

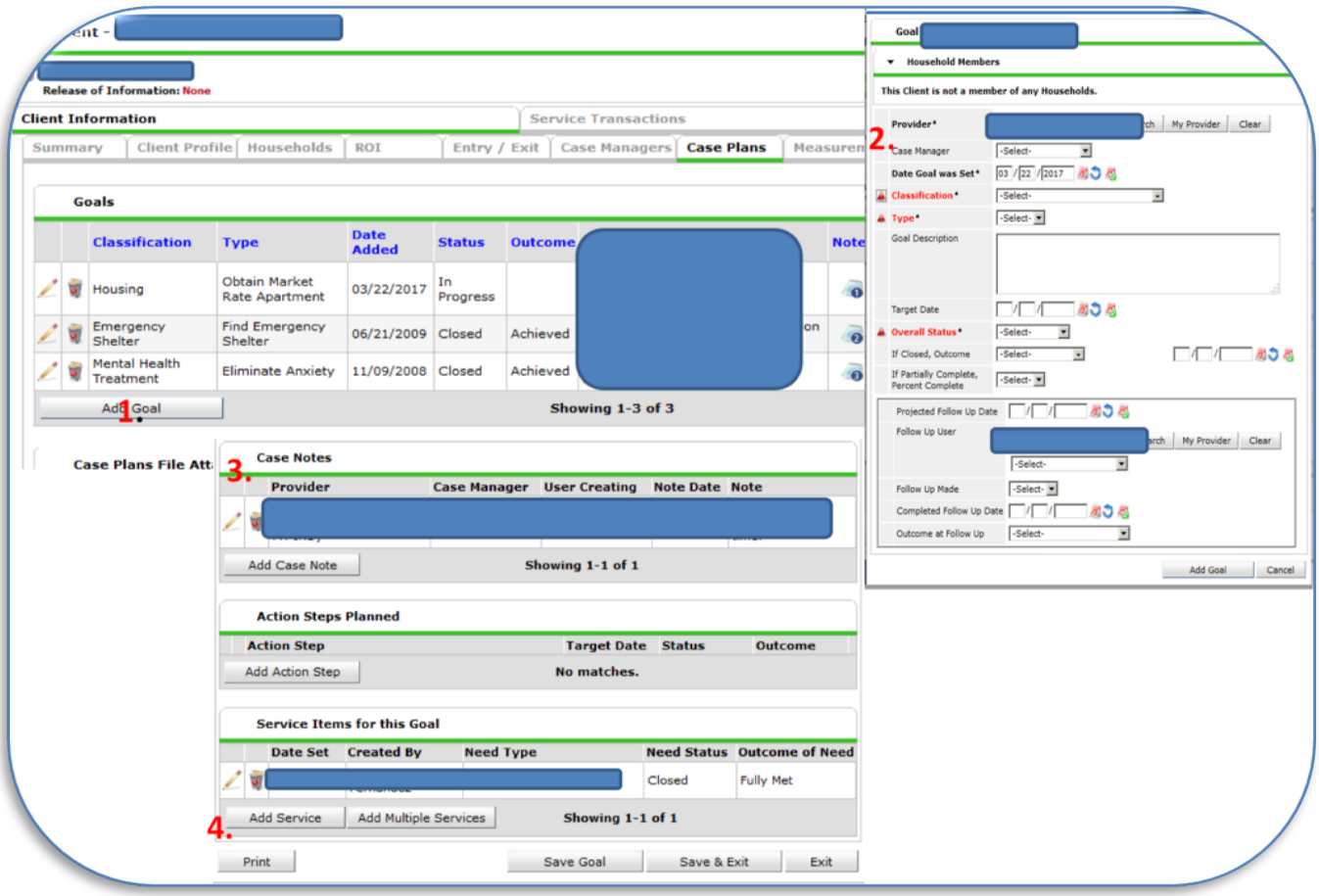
7) Next, you need to assign yourself case manager. This is done on the '**Case Managers'** tab. Click on 'Add Case Manager', on the next screen that pops up, click on 'Me' and then type in the project entry date as the start date. There is no end date yet because you are still working with this client.



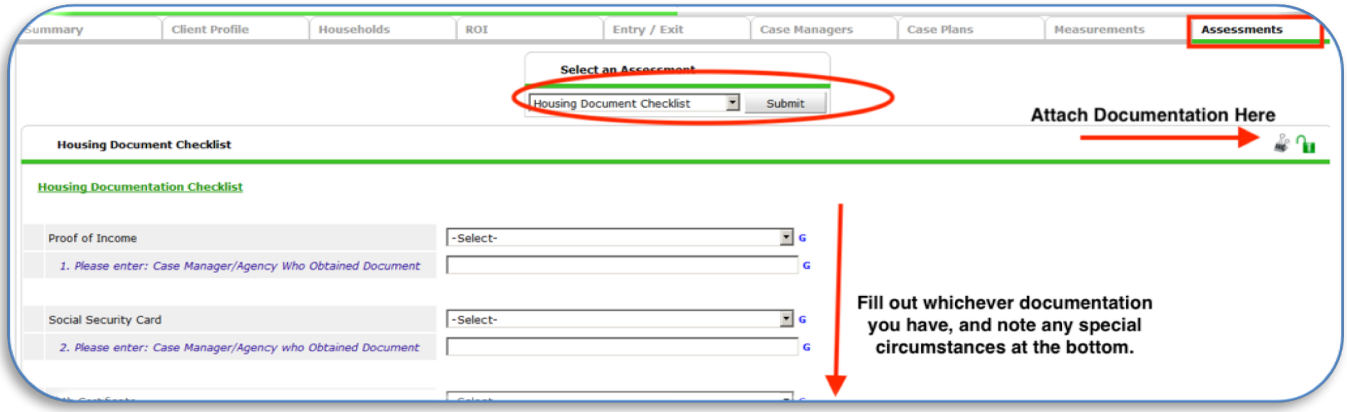
8) Time to put in the VI-SPDAT. Individual VI-SPDAT 2.0 is added under the **Client Profile** Tab Family-VI SPDAT 2.0 should be input under the clients' **Summary** Tab and the Transitional Age Youth (TAY)-VI should be input in the dropdown of the **Assessments** Tab! Clients should ONLY HAVE ONE VI-SPDAT. If a client has two, contact the HMIS team to have them remove one of them. Questions on this process? Call the RI-HMIS System Administrators.

9) Add any Case Plans/Goals in the '**Case Plans**' Tab

- **a.** **Add a Goal.** If a Goal is already there that matches the goal you are working on, you can only add to it if it is the same provider that is serving the client now through you.
- **b.** After you click **Add Goal**, be sure you are Entering Data As the right program – Select Yourself as **Case Manager**, set **Goal Date**, set **Classification/Type**, Add a Brief Description and if you are still working on the goal select **In Progress**.
- **c.** Add a **Case Note** – Select yourself as Case manager.
- **d.** **Action Steps** are optional.
- **e.** Add **Service Transaction(s)**. The Services should always have the same start and end date/time and be marked **'Closed' and 'Fully Met'.**



10) Almost Done! Time to Update the **Housing Document Checklist** that is located in the **Assessments Tab.** This is required to use to ensure/track when clients are housing ready. Documents can be attached to this list directly.



11) You have successfully entered your client into your program! Great work! ☺

b. STEPS TO TAKE WHEN ADDING A CLIENT CONTACT OR DATE OF ENGAGEMENT TO A CLIENT ALREADY IN YOUR PROGRAM.

1) Follow steps a. 1-4 above.

2) Instead of doing an entry, because this client is already in your program, you need to add an '**Interim**' and the only type we use for recording client contacts is '**Update.'** If it has been a 365 days (with 30 days before/after), you may complete an **'Annual Assessment'**. Go to the **Entry/Exit** Tab, and click on Interim next to your programs OPEN Entry. Select 'Add Interim Review' on the next window that pops up. For the review type, select 'UPDATE' and input the date you contacted your client. Click **Save and Continue**.

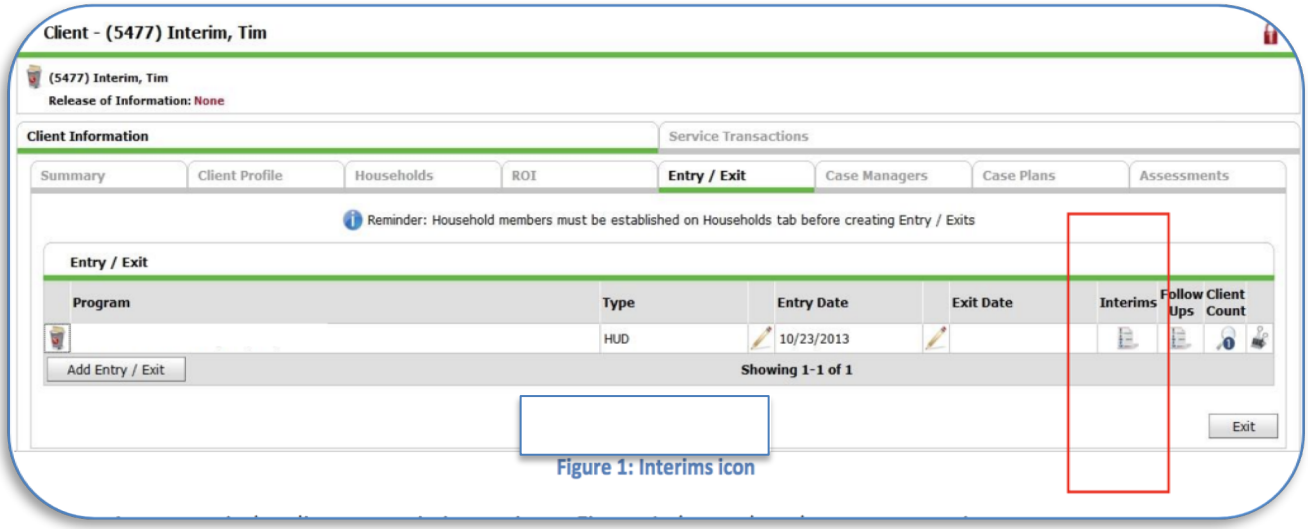
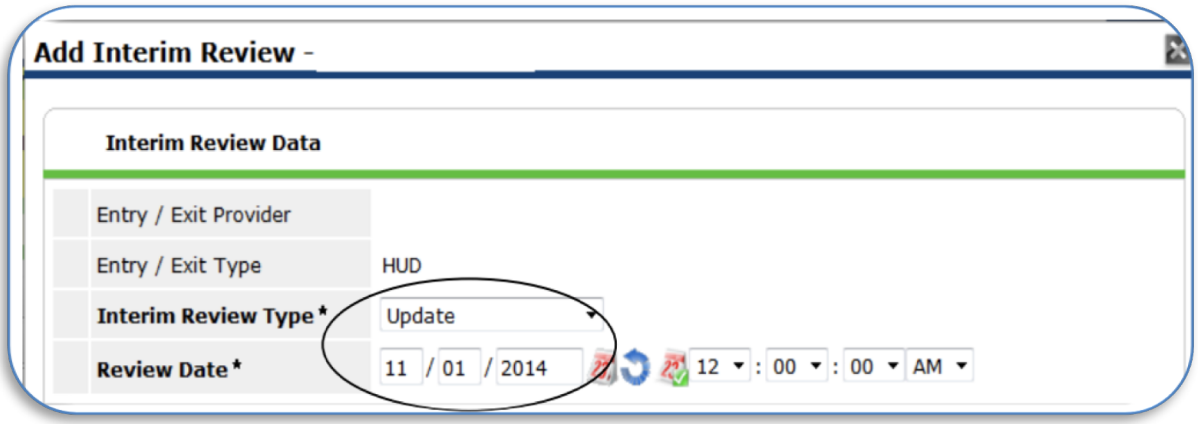
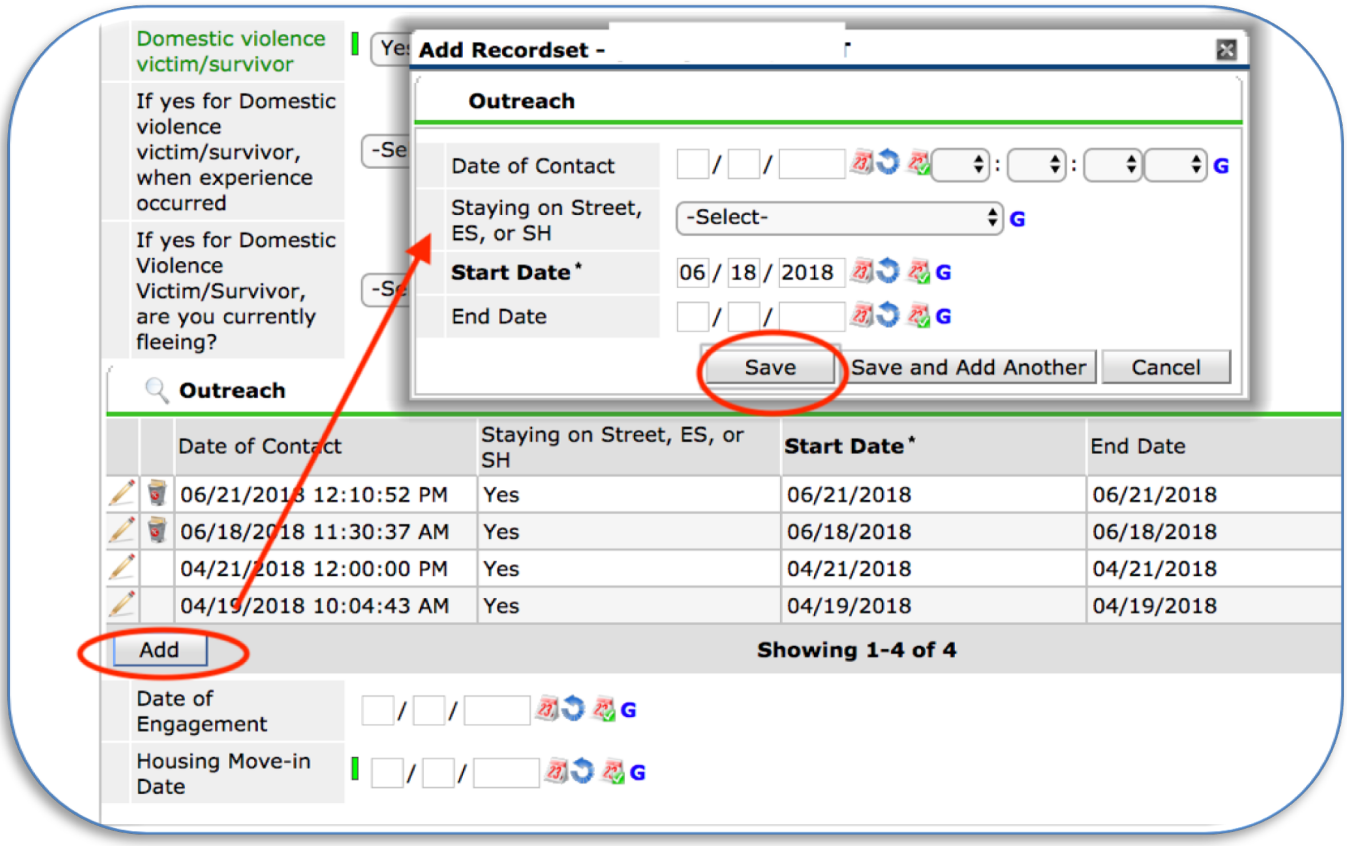


Figure 1: Interims icon



3) Update any reported changes of **Income, Noncash Benefits** and **Health Insurance** if any.

4) Scroll to the bottom. Select: **Add** Under **Outreach**. On the next box that comes up, put the **date/time of the contact**. Select **where the client was reportedly staying** on the date you contacted them. The **Start Date and End Date should always be the same (**the end date does not populate on it's own, you must input it.) Click **Save**.



5) Following the steps above, this is also how and where you add the **Date of Engagement** once engaged and if the client gets into housing, you may add a **Housing Move-In Date.**

6) Repeat these steps every time a client contact occurs by creating a new Interim Update each time.

7) Each time you contact your client, you should follow steps a. 9-10 above to add a **case note**, **service transaction and** update the H**ousing Document Checklist.**

8) **You have successfully added your Client Contact and/or Date of Engagement!** Great Job! ☺

c. STEPS TO TAKE WHEN EXITING A CLIENT FROM YOUR STREET OUTREACH PROGRAM

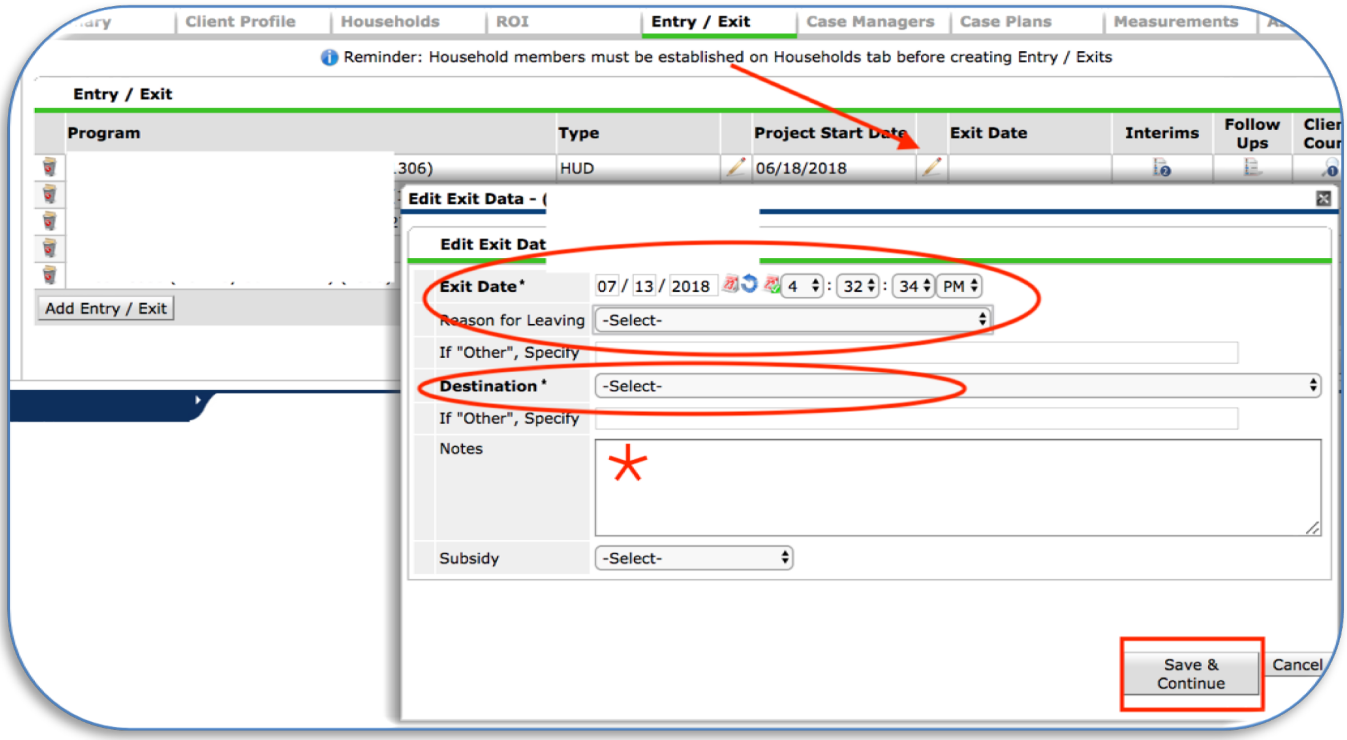
1) Follow Steps a. 1-4 above.

2) Locate your programs entry on the **Entry/Exit** tab. **Click the pencil next to the Exit for your program.**

3) Identify the **Exit Date**, **Reason for Leaving, Destination** and also add in a **Note about where the client went with your INITALS.**

a. As mentioned above, clients can leave your program for many different reasons. Please try to avoid 'Other,' ''Client Refused,' Client doesn't know,' and 'No Exit Interview Completed' as much as possible as this impacts your data quality!

i. Tip: Try to get your clients phone number or email address in case you do not see them again or if their situation improves so you can record and get credit for their actual positive destination. Otherwise, a null exit destination will bring down your data quality score.



4) Update any **Income, Noncash Benefits, or Insurance** as it prompts you to on the next screen. Scroll down, **record a Contact Date (if Applicable)**. Click **Save and Exit**. The client is successfully exited – but you're not done quite yet.

5) Now, you must **CLOSE** any open goals, case plans OR service transactions for *YOUR PROVIDER* that was discussed in steps a.9 above.

6) Lastly, **you must END yourself as Case Manager.** Otherwise, even though the client is exited from your program, you are the main contact person in HMIS until there is an End Date next to your name. Do this by following step a. 7 above, clicking the pencil next to your name and adding an End date.

7) **You have successfully exited your client from your program!** Great work! ☺

Have Any Questions?

Contact one of our
HMIS Team Members!

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