

## HMIS Agency Data Administrator Training

Friday, 3/25/2022

1:00 pm – 2:00 pm

### Presenters:

Julie Burdick, Joanna Lloyd, Gloria Villagrana

### Attendees:

See Attached Sign-in Sheet

<b>Introductions &amp; Agenda Review</b>	Notes are also available online for review, <a href="http://www.dupageco.org/HMIS">http://www.dupageco.org/HMIS</a>
<b>Updates</b>	<ul style="list-style-type: none"><li>• 211 Project to use HMIS to record call, need, and referral data. Project scheduled to officially launch 9/1/22.</li><li>• Standard Operating Procedure (SOP) changes pending leadership approval (4/6). To be reviewed at the 5/27/22 meeting.</li></ul>
<b>Reports/Data Needs</b>	<ul style="list-style-type: none"><li>• ART upgrade still undergoing user testing through the end of April</li><li>• Updated PIT report is now available addressing the new race and ethnicity data elements. HIC Supplemental report still pending an update.</li><li>• New Vendor report released and being evaluated; assesses DQ for Relationship to Head of Household and Location. Similar to a locally created report released earlier this year, which is currently available in the 01 folder for all to use.</li><li>• ESG CAPER for both ESG County and ESG CV State and County grants are due in April. Complete data reviews and corrections no later than 4/8/22. An updated workflow document is attached and posted online at <a href="https://www.dupagecounty.gov/HMIS/Workflow/">https://www.dupagecounty.gov/HMIS/Workflow/</a>.</li><li>• Moving On data entry for PSH projects. A workflow document has been created (attached) and will also be posted online at <a href="https://www.dupagecounty.gov/HMIS/Workflow/">https://www.dupagecounty.gov/HMIS/Workflow/</a>.</li><li>• Overview of system reporting for LSA, System Performance Measures, Housing Inventory Count. and Point-in-Time Count. Discussion around preferences for sharing data uses/reporting. Suggestions were mentioned to incorporate this in new user training and to consider email updates to help inform all End Users.</li></ul>
<b>Mark Your Calendars</b>	<ul style="list-style-type: none"><li>• Next Agency Data Admin meeting May 27, 2022</li><li>• Quarterly PIT 4/30, due May 13, 2022</li><li>• ESG and ESG CV reporting due April 8, 2022</li></ul>

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Agency Data /

12:51 PM - 67 min

ID: 323811013

## Attendees

Diagnostics

Attendee	Join & leave times	Location
<b>OZ</b> Ozzy Salcedo (MSHV) ozzy@mshv.org	12:54 PM - 1:57 PM	Lombard
<b>CH</b> Chris Madsen cmadsen@cc-doj.org	12:58 PM - 1:57 PM	New York
<b>ST</b> Steven Fixler steven.fixler@dupageco.org	12:55 PM - 1:57 PM	West Chicago
<b>JU</b> Julie Burdick (She/Her) hmis@dupageco.org	12:51 PM - 1:57 PM	Cicero
<b>GL</b> Gloria Villagrana	12:54 PM - 1:57 PM	Springfield
<b>JO</b> Joanna L hmis@dupageco.org	12:55 PM - 1:57 PM	Silverton
<b>KE</b> Kelly Mannion kmannion@360youthservices.org	12:55 PM - 1:57 PM	West Chicago
<b>AM</b>	12:57 PM - 1:57 PM	New York

Attendee	Join & leave times	Location
Amy LaFauce alafauce@cc-doj.org		
<b>SN</b> Snipes, Lisa HSLXS@dupageco.org	12:56 PM - 1:57 PM	Cicero
<b>RE</b> Regina Williams Regina.Williams@serenityhouse.com	12:58 PM - 1:57 PM	Addison
<b>CO</b> Colleen Conwood cconwood@cc-doj.org	12:58 PM - 1:57 PM	New York
<b>CA</b> Carrie Fiore Carrie.Fiore@dupageco.org	1:00 PM - 1:57 PM	West Chicago
<b>TO</b> Tonya	12:58 PM - 1:57 PM	West Chicago
<b>SU</b> Susan Ryerson Espino susan.espino@bridgecommunities.org	1:05 PM - 1:57 PM	Troy
<b>SA</b> Sara Vainowski svainowski@dupagepads.org	1:00 PM - 1:57 PM	Elmhurst
<b>+1</b> +16304889168	1:00 PM - 1:57 PM	-
<b>MA</b>	1:07 PM - 1:32 PM	West Chicago

**Attendee**

**Join & leave times**

**Location**

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Matthew McNiel

mcniel@gmail.com

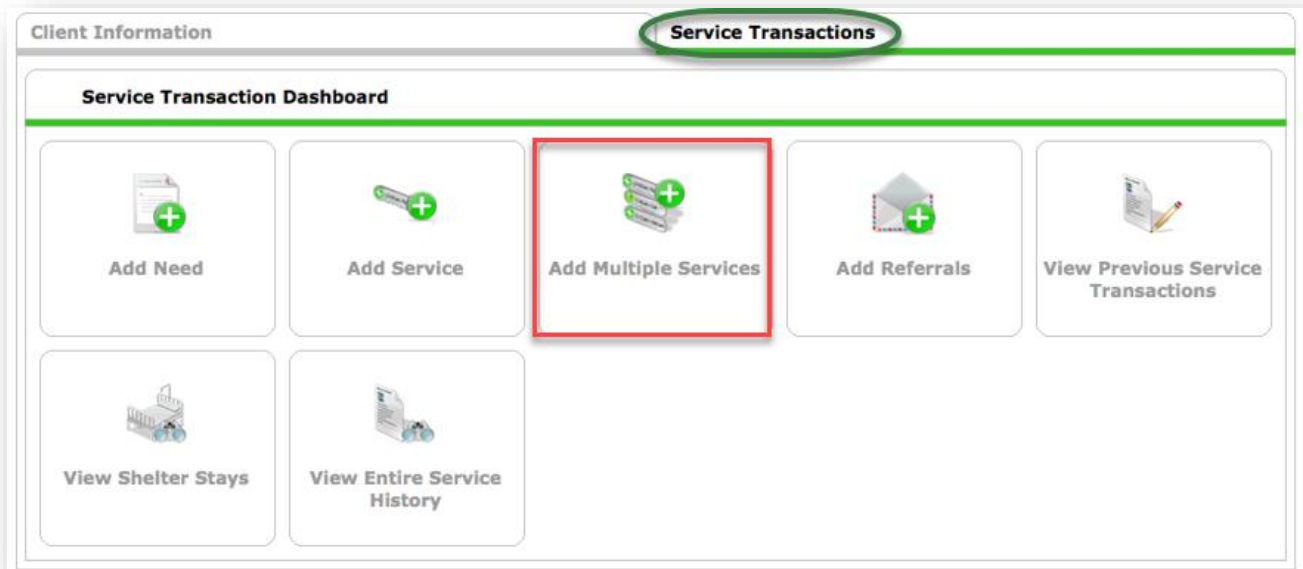
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# Moving On Assistance Workflow

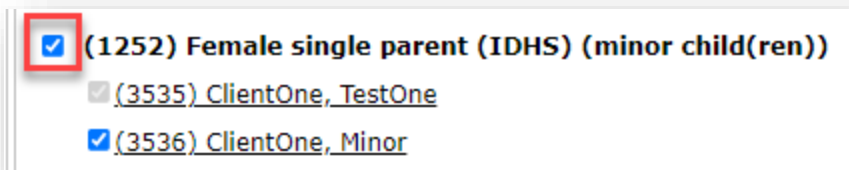
Moving On assistance are activities that support clients who voluntarily transition from **Permanent Supportive Housing (PSH)** projects to other affordable permanent housing, as they no longer need or want intensive supportive services but continue to need housing assistance. In accordance with FY2022 HMIS Data Standards effective 10/1/2021, PSH providers are tasked with recording information about Moving On assistance activities for clients. To ensure projects are capturing all necessary information, the Moving On Assistance data fields have been added to the **Service Transaction** record in HMIS for **PSH projects and must be documented at every occurrence when Moving On assistance is provided.**

This document provides further guidance on entering Moving On Service Transactions. Apply the HMIS [Standard Workflow \(PDF\)](#) data entry procedures prior to adding Moving On Services. Services are to be recorded after an Entry into a PSH program has been created, and before the client Exits from the program. **Services will be applied to all household members who are benefiting from the service.**

1. Log into HMIS, go to the **Head of Household's** client record and follow the HMIS Standard Workflow.
2. Click on the **Service Transactions** tab and select **Add Multiple Services** from the dashboard.



3. **Household Members** – Include all household members receiving the Moving On service.



4. **Service Provider** - Select the PSH program providing Moving On assistance using the  or  functions. The Service Provider should be the same as the PSH Entry/Exit Provider.

- a. **Start Date/End Date** – Record the date the service was provided. The End Date may be the same as the Start Date.
- b. **Service Type** –Select the appropriate response for the Moving On service provided from the drop-down pick list.

5. **Moving On Assistance** –Select the Moving On service provided from the drop-down pick list. The **Service Transaction Term** must correspond with the appropriate **HMIS Data Standard Term**.

The screenshot shows a web form with the following fields and values:

- Service Provider\***: DuPagePads - Olympus Place (PSH) (6713)
- Start Date\***: 03/25/2022 11:17:39 AM
- End Date**: 03/25/2022 11:17:39 AM
- Service List**:
  - Number of Services\***: 1
  - Service Type\***: Moving Expense Assistance (BH-3800.5150)
  - Service Transaction Term**: Financial assistance for Moving On (e.g., security deposit, moving expenses)
  - HMIS Data Standard Term**: (empty)
  - Need Information**: (empty)
  - Need Status\***: Closed

Use the **Moving On Assistance Provided** table below to select the appropriate corresponding term.

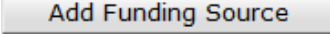
### Moving On Assistance Provided


<i>HMIS Data Standard Term</i>	<i>Service Transaction Term</i>	<i>Service Code</i>
Subsidized housing application assistance	Benefits Assistance	FT-1000
Financial Assistance for Moving On (e.g., security deposit, moving expenses)	Rental Deposit Assistance	BH-3800-7250
	Moving Assistance	BH-5000 and related
Non-financial assistance for Moving On (e.g., housing navigation, transition support)	Housing Search and Information	BH-3900 and related
	Case/Care Management	PH-1000
Housing referral/placement	Supportive Housing Placement/Referral	BH-8500 and related

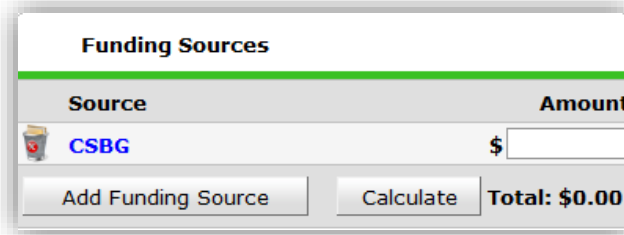
**6. Service Costs** – To be completed for financial transactions. (Optional)


- a. **Number of Units** - If applicable, enter a numerical value of how much is being provided. Examples may include: 2 gas cards, 1 month of rent, 1 hour of Case Management, etc.
- b. **Unit Type** - Select the appropriate type from the provided pick list, if applicable. Examples may include hours, gift cards, vouchers, months, etc.
- c. **Cost per Unit** - The value of each unit. For example, monthly rent or utility amount.
- d. **Total Cost of Units** - Total amount of assistance.

**7. Apply Funds for Service** (Optional)

a. **Funding Sources** - If applicable,  to designate the grant(s) that is paying for this service.

b.  **Add the Funding Source**, enter the total **Amount** per Funding Source.



Source	Amount
 CSBG	\$ <input type="text"/>

**Total: \$0.00**

c. **Support Documentation** – Upload supporting documents, if applicable.

**8. Follow Up Information** – complete if applicable.

**9. Need Information**

- a. **Need Status** – Select the **Closed** status from the drop-down pick list.
- b. **Save & Exit** or select **Add Another** to add another Moving On service for this household.