STANDARD DATA ENTRY WORKFLOW SP5.15

Introduction

This document outlines the standard data entry workflow that uses program entries and exits as prescribed by the HUD HMIS Data Standards and our HMIS vendor. Learning and following the standard workflow ensures complete, timely, and accurate data collection for three aspects:

1. Reporting
2. Coordination of services
3. Meeting local, state, and federal data collection requirements

Reference the HMIS Data Standards on the HUD Exchange for more details on each of the data elements, who they are required for, when they are required to be captured, and what is being captured.

Prior to collecting or entering data

Discuss your agency's Privacy Notice with the client and ensure proper understanding. HMIS is set-up to share data as described in your agency's privacy notice.

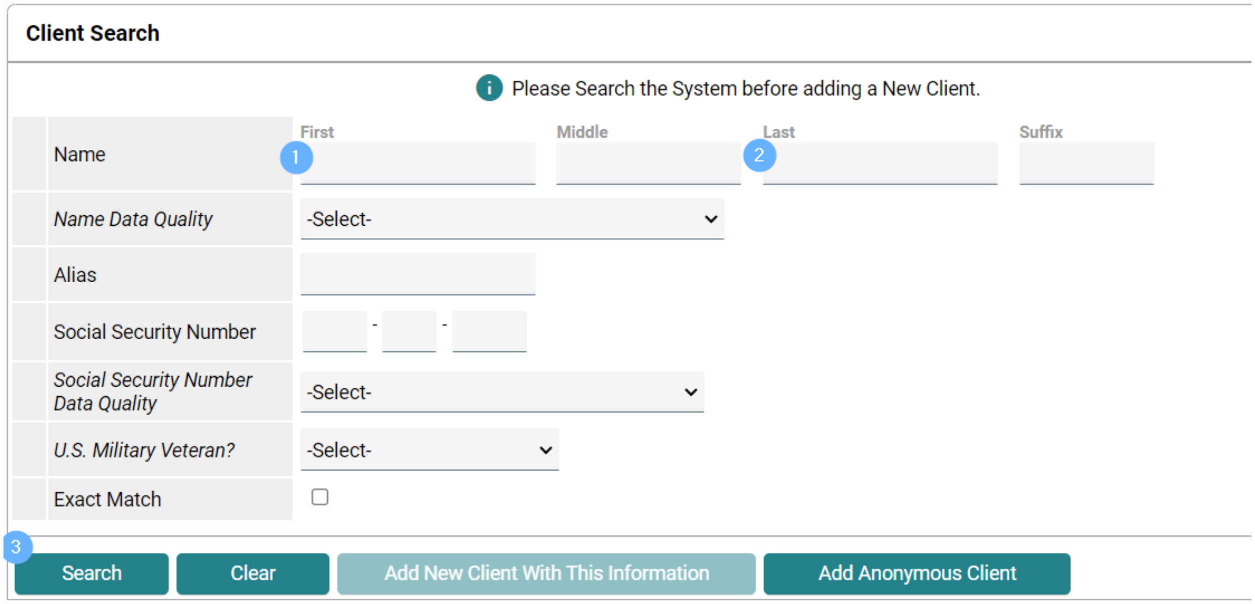
- Some programs have agreements to share data between one or more agencies. A signed consent is required for any data not covered by the privacy notice prior to entering data into HMIS. Use the **Enter Data As** (EDA) function, set to the program the client is being served by, to complete this client's data entry to share the data as agreed upon.

- The client has a right to not share their data in HMIS but the data must still be entered. If they choose not to share their data, check if the client has a record in the system and have the client complete the associated privacy form to restrict data sharing. Contact HMIS with the Client Id to review next steps or refer to the Visibility Adjustment Addendum.

Complete assessments with the client in mind by asking questions in an easy-to-understand format and entering the data as reported. When collecting personal information, a client-centered approach should be used. Every client must be asked for their self-reported information. Staff observations should never be used to collect information regarding how a client identifies. Review responses and update as needed to reflect current information. The assessment may be completed over multiple visits if needed.

Client Module

Client Search



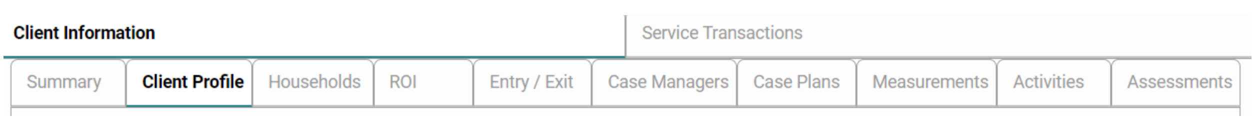
Search for the client in **Client module**, using a partial first and last name or the Client ID if it's known. Review all search results for identifying information that matches that of the client's (name, social security number, date of birth, etc.).

Tip: To obtain the most accurate search results, use a partial first and partial last name.

If no match is found, proceed to *Add New Client With This Information*, otherwise select the existing client record.

Client Information

Client Profile



If the client signed the request to not share their data, then lock the record now, or contact the HMIS Help Desk for assistance. See Visibility Adjustment Addendum. This process will need to be completed for all household members.

- The lock icons throughout the client record inform you as to what data is being shared and to whom. This can be viewed by clicking on the icon.
- The lock icon in the top right corner of the client record manages access to the client record.

- Users should not make any changes to data sharing without signed consent from the client and proper training/support.

Client Record

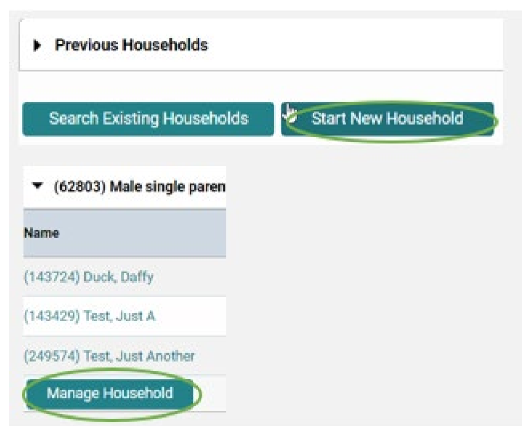
Add new data or review existing data for updates needed. Data quality fields are used to inform what level of data was entered. Enter data exactly as provided by the client.

- The name, Name data quality, social security number (SSN), SSN data quality, and U.S. Military Veteran details for the client.

If the client does not -

- Associate with their legal name, the name entered into HMIS should reflect the name the client identifies with, unless the legal name is required by the funder.
- Have a SSN or does not know it, leave the SSN fields blank, and select Client doesn't know from the SSN Data Quality Field.
- Want to provide a response, leave the field blank and select Client prefers not to answer where prompted.

Household



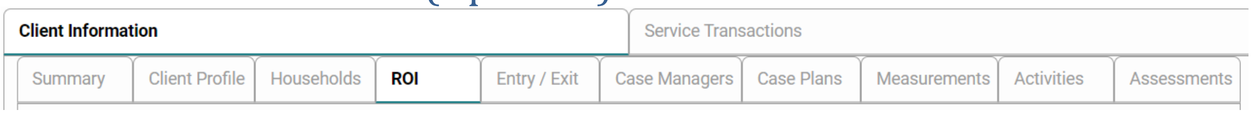
Create / update the household data ***Household Type, Household Members, and Relationship to Head of Household (HOH)***.

Everyone must be assigned a household, and each household must have a Head of Household. *See Household Addendum*.

Add Social Security Number (SSN) and U.S Veteran data for all members.

If the client has signed the *Client Data Sharing Refusal Form*, then lock the household member's record now, or contact your Agency Data Administrator or the HMIS Help Desk, nilhmis.cayzu.com, for further assistance. See Visibility Adjustment Addendum.

Release of Information (Optional)



Add a **Release of Information** (ROI) for the agency, including all household members.

- The start and end dates should reflect the actual dates of the agreement or the date the privacy notice was discussed. Where there is no end date, as is with the privacy notice or request to not share data, enter 3 years from the Start date.
- Attach signed privacy forms to the related ROI record.

Start Date

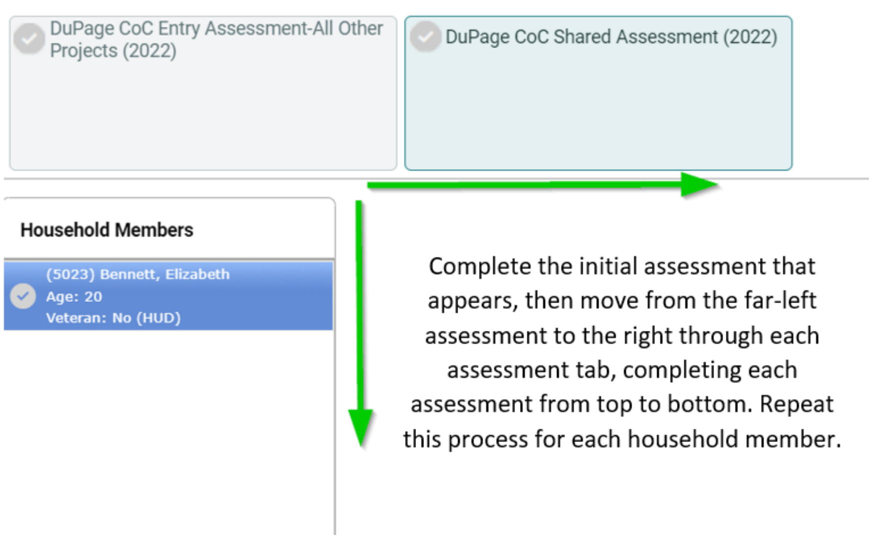
Date the privacy notice was reviewed with the client or the start date as listed on the signed agreement.

End Date

3 years from the Start Date, or as otherwise stated in the signed statement and/or Agency Privacy Notice.

Program Entry

Add a Program Entry through the **Entry/Exit** tab, including all household members, completing <u>all</u> program required assessments for <u>each</u> household member.



Provider

Select the Program that is providing the service.

Type

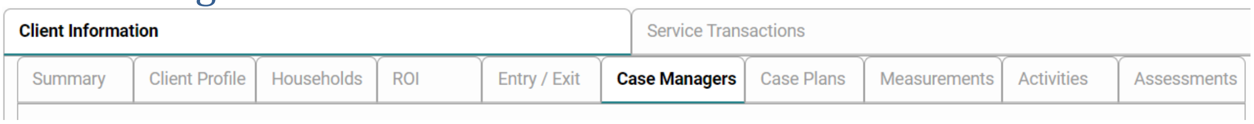
Determined by the program. Grant funded programs must use the funder from the list, otherwise it will be determined per your agency preference.

*If no assessment appears, the provider/type needs to be corrected

Entry Date

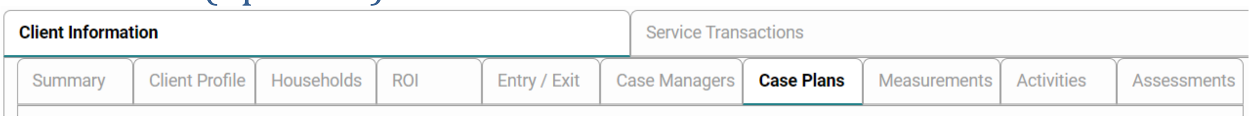
The date the client was determined eligible for the project.

Case Manager



Assign the Case Manager through the **Case Manager** tab.

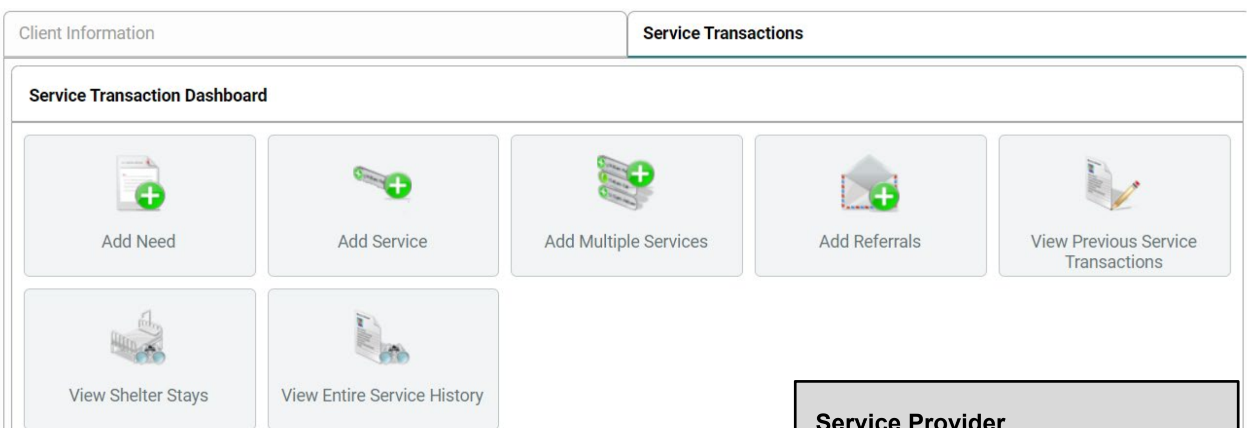
Case Plans (optional)



- Add a Goal, Case Notes, Action Steps, and any Services as it relates to the assigned goal.
- Update the client's progress on the goal and add additional goals as needed.
- Work with your Agency Data Administrator to determine how this is used in your organization.

*Client Follow-up may be scheduled through a specified Goal or Action Step. A follow-up reminder will appear in the Follow-up dashlet available on the End User's Home Dashboard.

Service Transactions



Service

Add a **Service Transaction**(s), including all HH members, for each service provided through this program. Include Service Costs and Funding Sources when applicable. *See Service Transaction Addendum*.

Client Follow-up may be scheduled through a specified Service Transaction. A follow-up reminder will appear on the End User's Home Dashboard.

Service Provider
Entry/Exit Provider

Start Date*
The date that the service was provided.

End Date*
The last day of this occurrence of this service. Often this may be the same date as the Start date.

**Neither of these dates can occur before the program entry date, or after the program exit date.*

Client Updates


Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Bridge Communities - Transitional Housing (HP) (8375)	Basic	09/01/2023				

- ALL client updates are to be documented in an Interim Review.
- At minimum, an Annual type of Interim Review must be completed within 1 month prior to the anniversary of the client's program Entry Date.
- Additional Interim Assessments may be required as determined by the program.
- Additional updates may include changes in the Household, Service Transactions, and Case Plans.

Program Exit


Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Bridge Communities - Transitional Housing (HP) (8375)	Basic	09/01/2023				

Prior to exiting the household from the program, review the **Case Manager**, **Case Plan** and **Service Transaction** tabs to complete any data entry, and to close out records as needed.

Exit Date
Last day of program participation.

Then, on the **Entry / Exit** Tab, select to add a **Program Exit,** including all household members who are exiting the program at this time, completing the responses for **Reason for Leaving** and **Exit Destination.** Update all required assessments for each household member.

Follow-Up


Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Veterans Assistance Commission of DuPage County (3753)	Basic	09/08/2023	09/19/2023			

Complete the **follow-up** assessment, as determined by your program, through the exited program on the **Entry / Exit** Tab.

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