HMIS REPORT INSTRUCTIONS for Long-term Homeless Projects

The quarterly LTH HMIS report should include complete information for all individuals and households served from July 1, 2009 – September 30, 2009. The LTH report is due to Minnesota Housing by November 2, 2009.

The LTH reports are generated using the Advanced Reporting Tool (ART) and include the following information (in 2 separate report documents):

1. **LTH _ Demographics and Entry Data:**
    - Number of participants and households served
    - Household composition
    - Age, race, ethnicity and gender
    - Disability and military service information
    - Homeless status at entry
    - Living situation before program entry and length of stay
    - State, county, city and length of time since last permanent residence

2. **LTH _ Exits:**
    - Length of time in program for people who have exited and for people still in the program
    - Reason participant left program
    - Reason participant left residence
    - Reason subsidy ended
    - Destination, perceived tenure and subsidy in new housing

TO PREPARE DATA FOR THIS REPORT:

1. Enter the required information in HMIS (ServicePoint) for all households served with LTH funding (see *Basic Instructions for Entering LTH data into ServicePoint* on the MN HMIS website OR the data entry review at the end of this document on page 10-11).

2. Update information that has changed since a household entered the program:
   - <u>LTH Assessment</u>- changes in income (for all adults or unaccompanied youth); residence, housing cost and subsidy information (in head of household record).
   - <u>Service Transactions</u> – add new services, put end dates on services that have ended

3. If households have moved or exited the program, make sure to enter the exit information in HMIS (see LTH data entry EXIT instructions on page 12 for details).
   - <u>Exit form</u>: enter exit date, reason for leaving, destination; update changes in residence, housing cost and subsidy; and update any changes in income (for all adults or unaccompanied youth)
   - <u>Service Transactions</u> – enter end dates on services that have ended

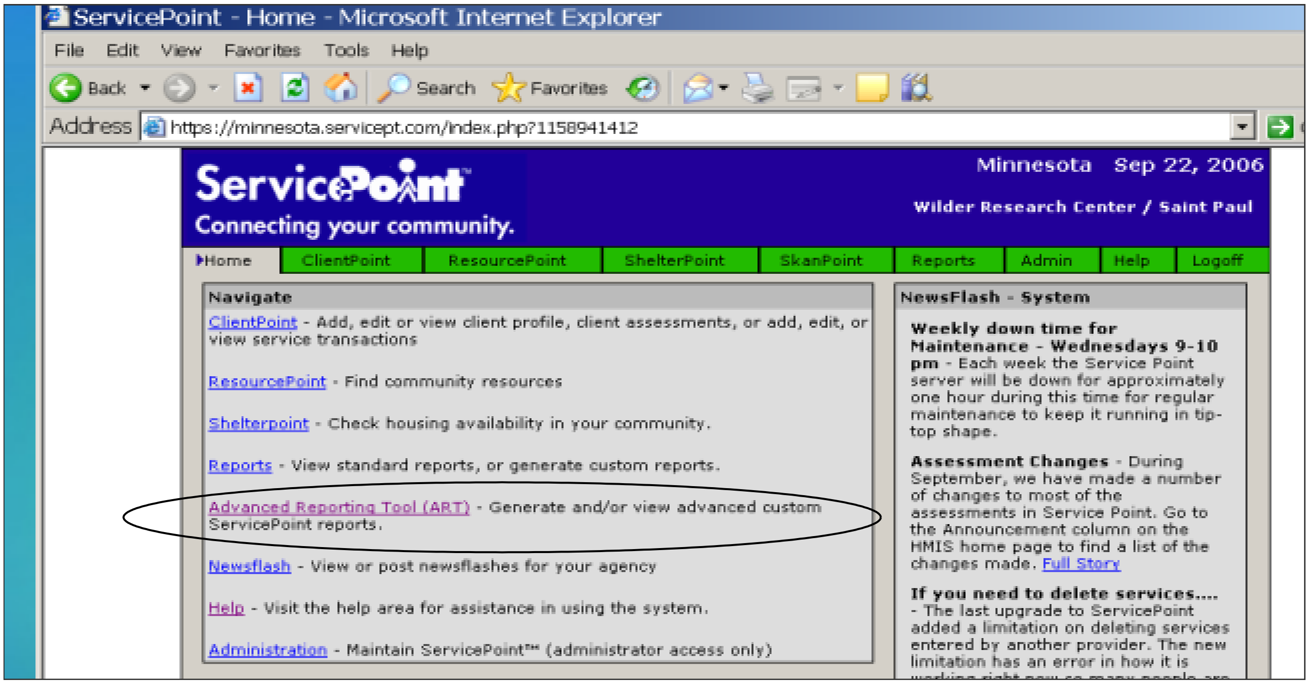
4. Update information in household records that was incomplete or inaccurate on the last report.
5. Run LTH data checking and summary reports in ART. Review and correct data in ServicePoint.
   - The data checking reports have instructions for reviewing data. Generally look for blank fields (missing data) and duplicate data for the same household.
   - In the summary reports look for "X Missing" or blank fields – that means that information is missing in your data. Also look for "error" in data fields – that means something is not working correctly in your report. Call the Wilder HMIS help line if you can't figure out the problem.
6. After checking and correcting data, run data checking and summary reports again. Review and correct data as needed in ServicePoint.

IMPORTANT NOTE: The Advanced Reporting Tool (ART) uploads data from ServicePoint each night, so if you make changes to data in ServicePoint you have to wait until the next day to run reports that will include the changes.

<u>Wilder HMIS Help desk:</u> If you have technical questions about using HMIS or ART (the report tool in Business Objects) please contact the Wilder HMIS help desk at:
Phone 651-280-2700 and ask for HMIS help, or email hmis@wilder.org

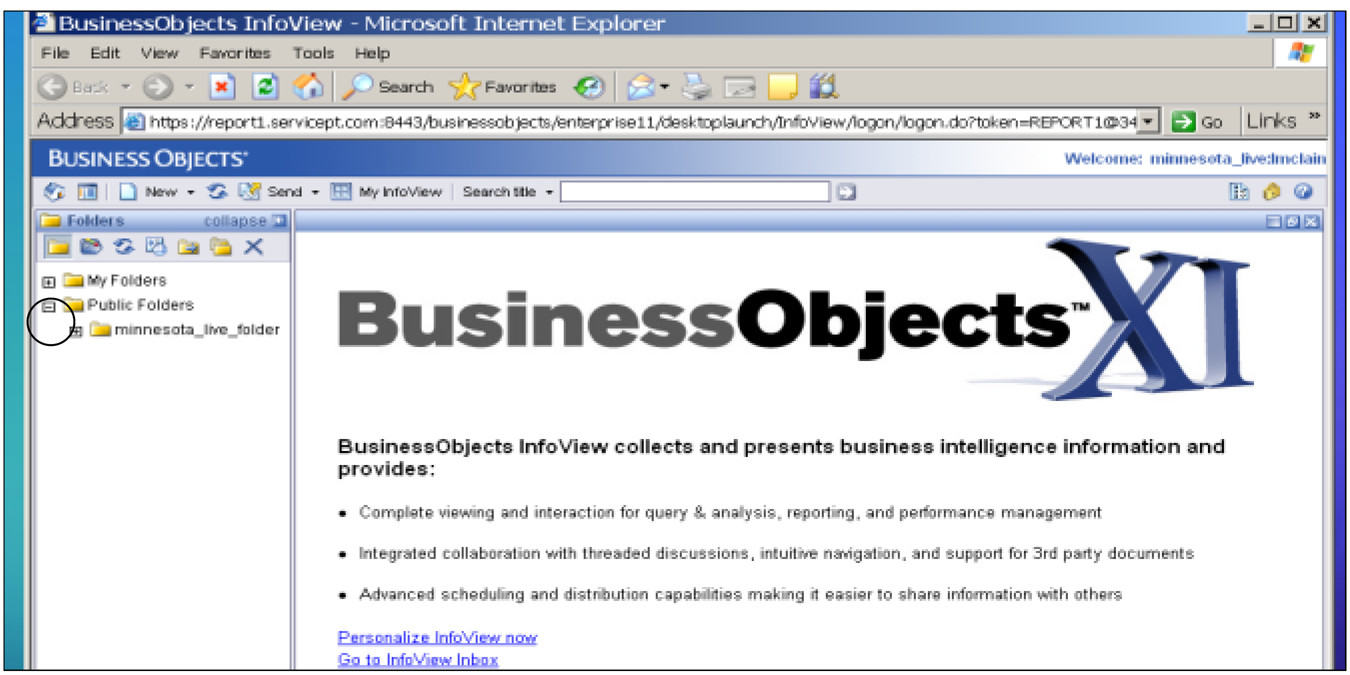
Running the LTH Report using ART (Advanced Reporting Tool)

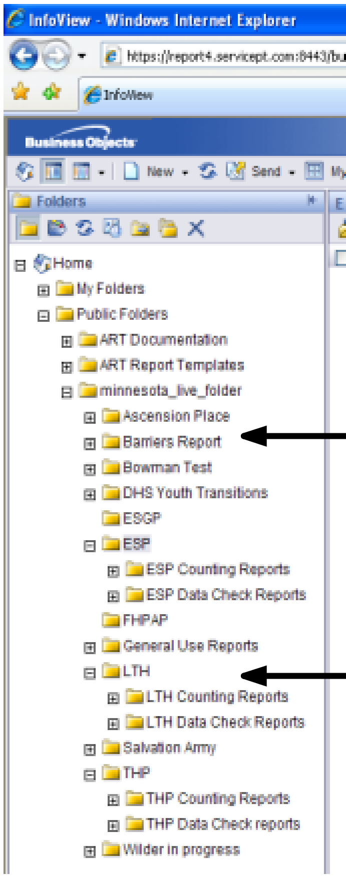
To access the Advanced Reporting Tool (ART), log on to ServicePoint. Click on the Advanced Reporting Tool section (as shown below). You can also access ART from the Reports page, but this is the most direct route.



This is the Advanced Reporting Tool (ART)

- All public reports are stored in the minnesota_live_folder
- Click on the + to open the folder





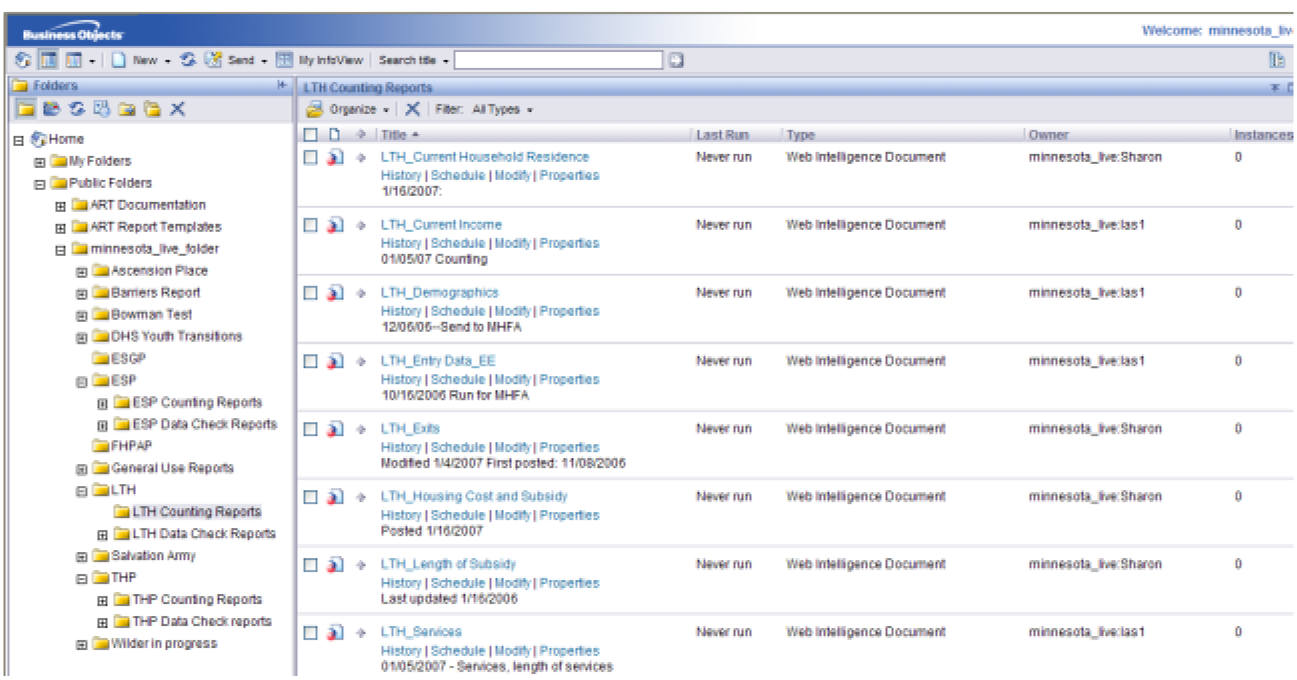
- You now see a list of all funding source or agency reports
- To see reports for each funding source, click on the name of the folder

Barriers Report: Click on the Barriers Report name to see the Barriers Counting Report and the Barriers Data Check Report.

For the remaining LTH reports, click on the folder label: **LTH**

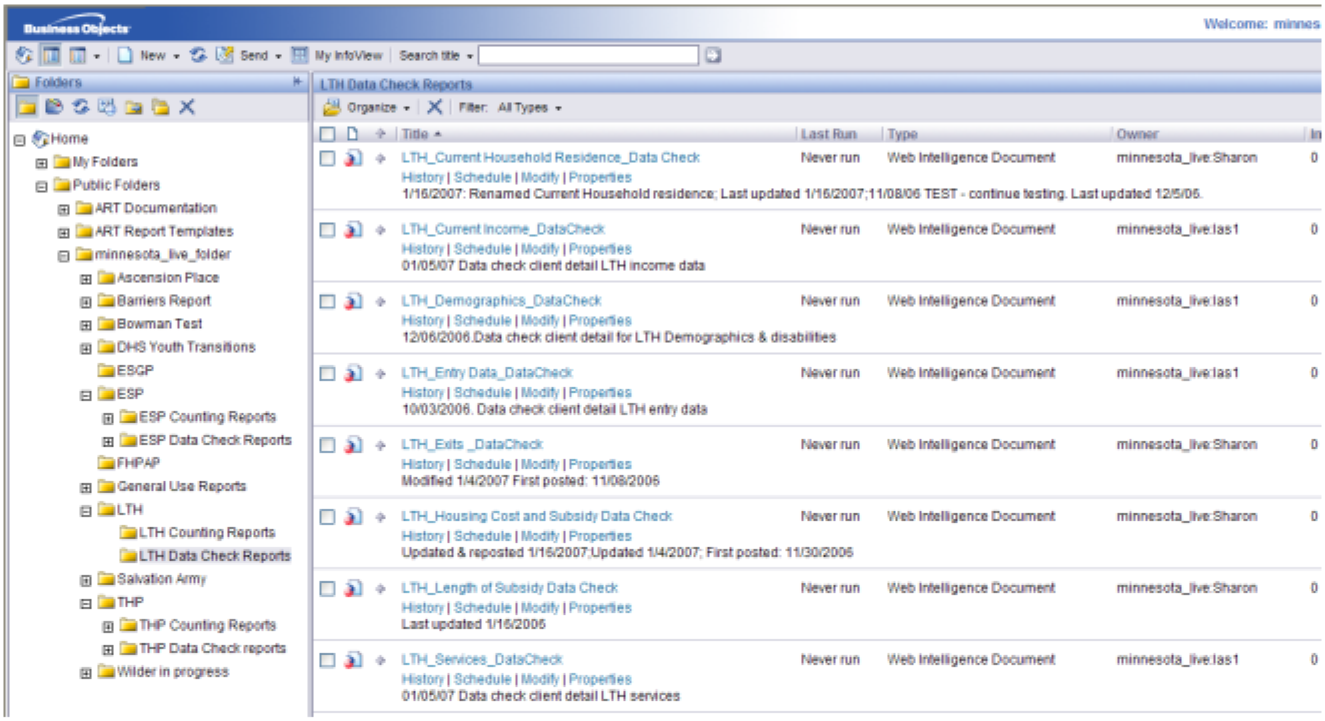
- The LTH Counting reports are the summary reports you will submit to your funder.
- The LTH Data Check Reports are for checking individual household data. DO NOT SEND THESE TO your funder!

LTH Counting Reports: When you click on the LTH Counting Reports folder name, you will see the summary (or counting) reports that you need to run, save and email to your funder (MN Housing or DHS). In addition to the Barriers Counting Report, there are seven reports here that you will need to run, save and submit (see descriptions on page 1):



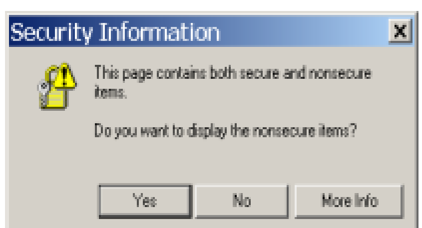
Data checking reports

Click on the LTH-Data Check Reports folder name to open it up and see the data checking reports. There are eight data checking reports. Each data check report coincides with the summary reports above.



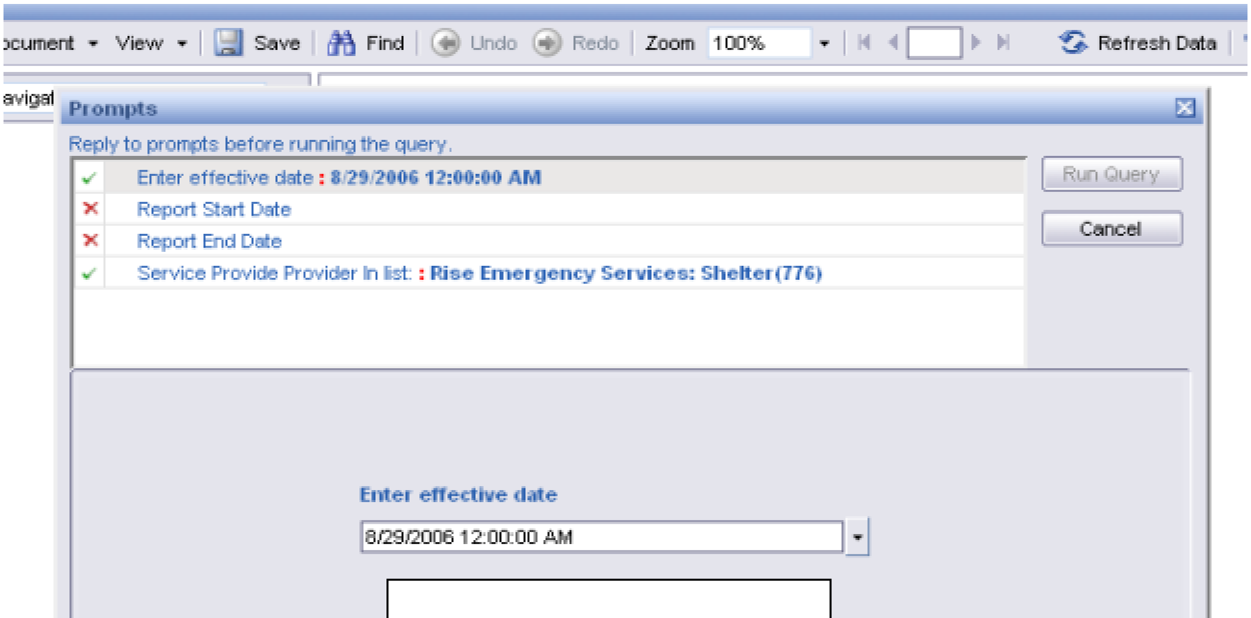
To start the process of running a report, click on the name of the report:

The first time you click on a name of a report you will see:



Click “Yes”

REPORT PROMPTS:



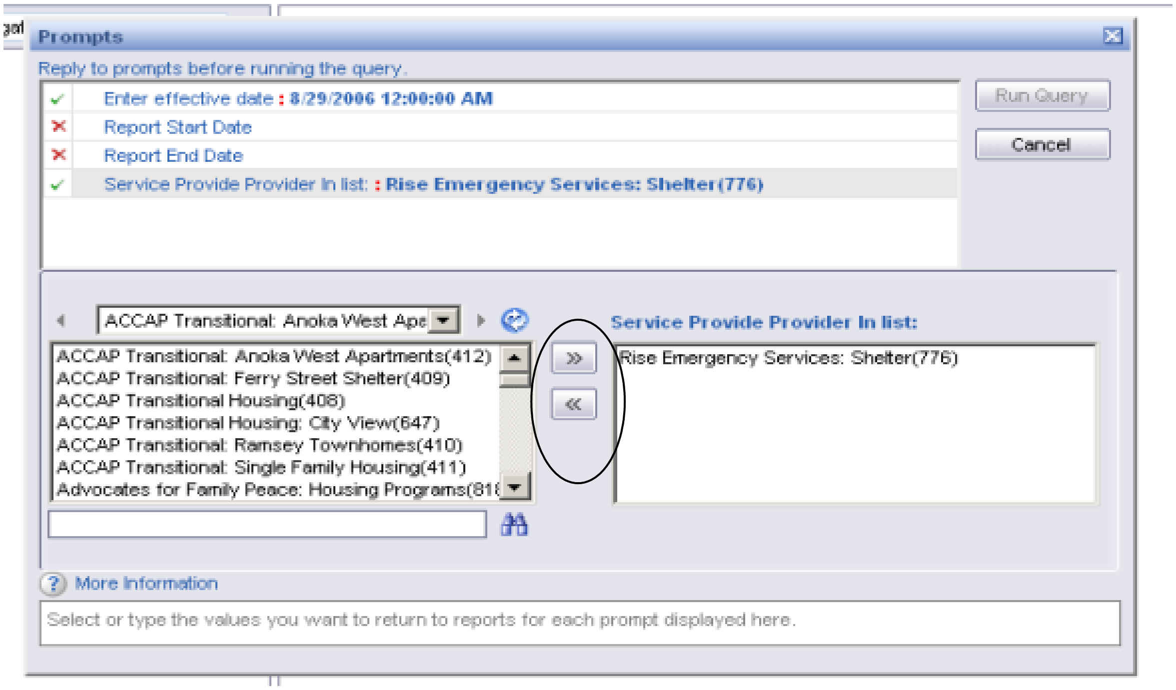
Enter information here

Enter the information for each prompt. Once you have data in the box, the red X becomes a green ✓ to show it is complete.

- **Do not use the Calendar function to select dates-** the report will have errors.
- **Enter Effective Date: the day you are running the report** (this will pull the most recent updated or corrected data into the report).
  - The Entry, Exit, and Barriers Reports do not have Effective Dates.
- **Enter Report Start Date: (For this report July 1, 2009)**
- **Enter Report End Date: (for this report October 1, 2009)**

Note that you must use October 1 for the end date to include activities that occurred on Sept 30

- **Select Provider (your LTH program/project)**

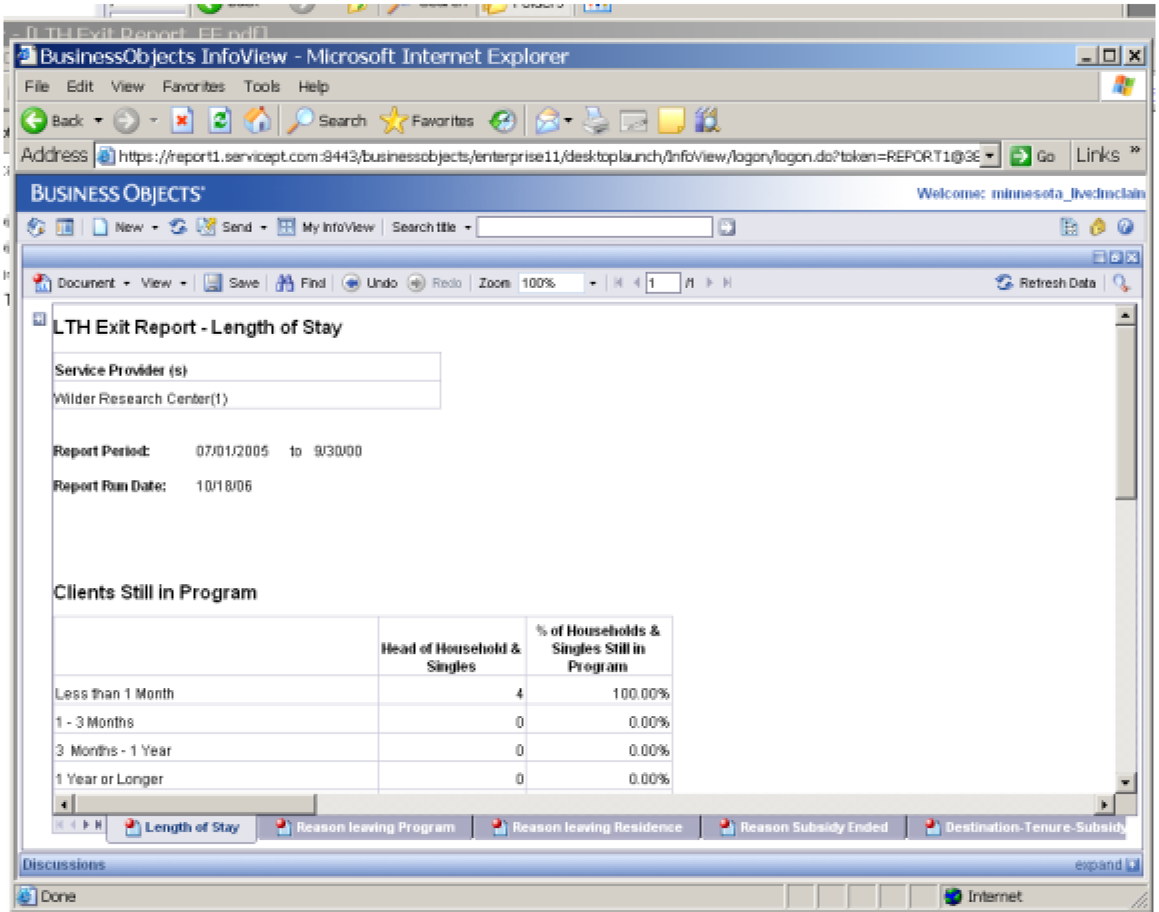


- Use the arrow buttons in the middle to move providers back and forth between sections.
- Move the LTH provider name(s) to the box on the right side.
- You can add multiple providers to the list

When all prompts have been entered, the ✓ will be green (or when you have updated information in all prompts). Click on RUN QUERY.

VIEW REPORTS

It will take a minute or two for the report to run. This is what you will see when a report opens:



REVIEW REPORTS

You can review the report on the screen or save it and print it out. Review all LTH Counting reports for accuracy.

DATA CHECKING REPORTS

Run all data checking reports and review for data completeness and errors (see the specific instructions in the data check reports).

CORRECT DATA

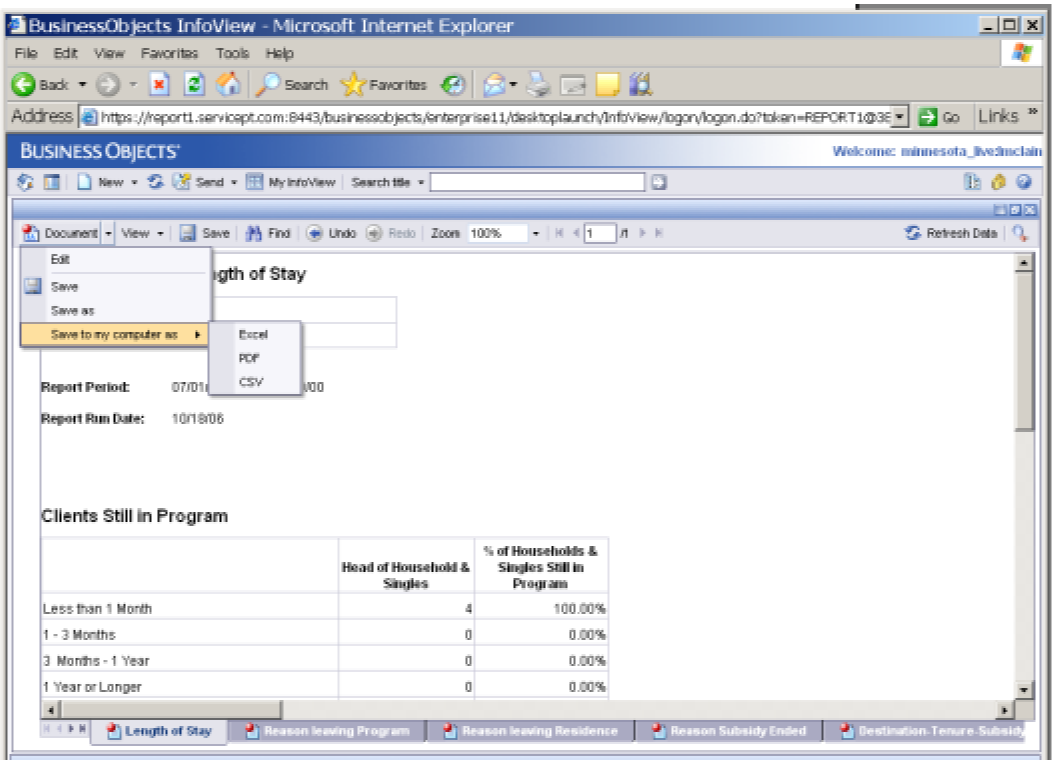
You can have both the report tool and ServicePoint open at the same time to help with correcting and updating information. If there is data that needs to be corrected, go back into ServicePoint and make the corrections to participant records. <u>NOTE:</u> <u>You will have to wait until the next day to run new reports that will include your corrections.</u>

RUN REPORTS AGAIN

Run all the reports again and check for accuracy and completeness. If everything looks good, you are ready to save the reports and submit them via email to your funder (Minnesota Housing or DHS).

SAVING REPORTS

To save, click on “Document” on the tool bar at the top left.



Select “Save to my computer as” and then select to save as a PDF or Excel file. Save the file in a location you can easily find (see the naming file instructions below for the reports you will send to your funder – Minnesota Housing or DHS).

SUBMIT YOUR REPORTS TO MINNESOTA HOUSING

You will submit the saved LTH reports to Minnesota Housing (see list on page 1). Save each LTH report as a PDF file and name each report so that it can be easily identified as follows:

- *your project name_ Report name _ Report end date*
  EXAMPLE: SycamoreSquare_LTHexit_0908
  SycamoreSquare_LTHentry_0908

Email all *two* PDF files to: andrew.hughes@state.mn.us and cc: Vicki.farden@state.mn.us

- If you have questions about how to submit your report to Minnesota Housing, contact Vicki Farden @ 651-296-8125 or Vicki.farden@state.mn.us
- For HMIS and ART technical questions, contact the HMIS help desk:
  Phone 651-280-2700 and ask for HMIS help, or email hmis@wilder.org

DATA ENTRY REVIEW

PROFILE: Basic client information

To make sure the LTH reports include the correct information at entry, enter each person's name, social security number (and SSN data quality), date of birth, gender, race, and ethnicity. You can enter as anonymous if the client requests and leave out name and SSN, but not SSN data quality. (If you do this, remember to write down the anonymous name they are assigned so you can look them up again in the system to add information or exit them from your program when they leave.)

<u>Create a household:</u> (not necessary for singles) To include related adults and/or children in the household, link household members using the "Households containing" box on the profile page. Click on the "add client to household" button, record the household type, and then enter the other household members. Complete the other household member's name, social security number (and SSN data quality), date of birth, gender, race, and ethnicity information and add them into the household. You need to make sure that all clients have the same "Date Entered" for the report to work correctly.

<u>Date of birth</u> is needed to break down people correctly as adults and children in the report. If you do not have a birth date, you need to estimate one (such as the first day of January and a year corresponding to how old you guess they may be).

ENTRY/EXIT

- Complete the Entry/Exit form in the head of household record. To include other household members, enter a check next to the member names at the top of the form.
- Be sure to select the Long-term homeless-funded program for your provider drop down box and Entry Type=Basic Entry/Exit.
- Change the entry date from today's date to the day they entered your program. Make sure all household members have the same entry and exit dates or they will not be counted as a household in the report.

UNIVERSAL ASSESSMENT:

Complete the following for all adults in household and unaccompanied youth.

- <u>Assessment date</u>: change the date to the program entry date (the day the participant entered the program) and then push Back Date Mode if the participant entered the program before you entered their information in ServicePoint.
- <u>Complete required sections for all adults in the household and all unaccompanied youth.</u> You must be in each person's record in ServicePoint. If there is more than one adult or unaccompanied youth in a household, go to their record separately and complete the information.
  - <u>Housing Situation at Program Entry</u>- complete all information
  - <u>Last permanent place lived for more than 90 days</u> – complete as much information as possible
  - <u>Monthly income</u>: For each source of income, enter the monthly amount and the day they started receiving income from that source (can be the day they enter the program) on each adult record. If an adult has no income or non-cash benefits, please record "no financial resources" as the income source. For Non-Cash benefits, select source and

record $1 for last 30 day income along with a start date. For either situation, if you do not know a start date, fill in a date on or before the day they started your program. Include income received on the behalf of a child under the head of household's record (do not report a child's earned income).

- Disability: if a client has a disability, enter each one separately in the sub-assessment. You also need to fill in a start date for each disability. Most disability start dates are not known, even by the clients. Use a date on or before their entry into the program (ex: birth date). Don't fill in an end date unless the disability ends for some reason. Assessing a disability can be through client interview, client self-administered form, observation or assessment. Keep in mind that if the client meets criteria for chronically homeless, you will need to have some record of their disability to show to HUD if audited.
- For household members 18 and older:
  - Does Client have a disability of long duration? – Answer YES or NO
  - Ever served on active duty in the U.S. Military (Veteran status)?

To easily change between household members records, go to the household section on the profile page and click on the pencil to open. Click on a name at the top of the box to go to a different person's record. You will see a blue arrow by the name to indicate the household member's record that you are in. Now you can go back to the Universal Assessment page and enter the required information for that household member.

LONG-TERM HOMELESS ASSESSMENT:

Complete the following in the **head of household record**:

- Assessment date: change the date to the program entry date (the day the participant entered the program) and then push Back Date Mode if the participant entered the program before you entered their information in ServicePoint.
- Information entered in the Universal Assessment will automatically appear in the corresponding fields in the LTH Assessment. You need to add the following information:
  - Military Service Related Disability? (for head of household age 18 and older)
  - Address and Unit Information: Client's Residence (complete at entrance when participant moves into housing and when they move and/or exit the program).
  - Housing Cost and Subsidy information: (complete at entrance, when changes are made and/or quarterly, and at exit).

BARRIERS TO HOUSING STABILITY ASSESSMENT:

Complete the assessment in the head of household's record including information on all household members.

NEEDS AND SERVICES:

Each participant/household should also have at least one need/service entered in ServicePoint. See the LTH Service Transactions Instructions (on the MN HMIS website) for information about recording service transactions for LTH.

- Services can be entered using the MULTIPLE SERVICES function
- Remember to record an end date when a service ends

EXIT households that move out or leave the program:

EXIT DATA: Open the Entry/Exit form. Access the exit section by clicking on the pencil by the exit date. Make sure to complete all the fields describing the reason for leaving and destination.

Update income information if there are any changes from when they entered the program:

Income from a source ends: If the client is no longer receiving money from an income source, add an end date.

Income from a source changes:

1. If a client is receiving a different amount of money from an income source, you will need to add an end date to the record you entered when they started the program, and save the record.
2. Next push the add button in the income sub-assessment. You will be adding a new record listing the same income source with the new amount of money they are receiving when they exit the program. Enter the date the amount changed as the start date. (If the income source changed and ended, also add an end date.)
3. The income source with the change will then be listed twice; once showing the amount of money received from that source at entry, and listed again showing the amount of money received from that source at exit.

SERVICES:

Make sure that all clients have end dates on services that are no longer being provided. To do this, go to the Service Transactions section and click on the "View Past Needs/ Services" button. Click on the pencil next to the service. Once the service screen opens, go to the "Service Provided for Need Identified" section and click on the pencil. Put a date in the Service End Date box and save the changes.

MN ENDING LTH ASSESSMENT:

1. Update Client Residence
   - Go to the MN Ending LTH Assessment. In the Client Residence section, click on the pencil next to the person/household's current address. A new window will open.
   - Reason for leaving this residence: From the dropdown box, select the reason the person/household is leaving/moving/exiting.
   - End Date: Enter the day the person/household moved or left the program.
   - Click on Save and Exit

2. Update Housing Subsidy
   - In the Housing Cost and Subsidy section (of the MN Ending LTH Assessment), click on the pencil next to the current housing subsidy. A new window will open.
   - Reason for subsidy ending: From the dropdown box, select the reason the participants housing subsidy is ending.
   - End Date: Enter the date the person/household moved out/left the program/subsidy ended.
   - Click on Save and Exit

Back in the MN Ending LTH Assessment, go to the bottom or top of the page and click on the Save Changes button. Then click on the Exit button.