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
- o 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).
 - Service Transactions 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.

Wilder HMIS Help desk: 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 <u>Advanced</u> <u>Reporting Tool</u> section (as shown below). You can also access ART from the <u>Reports</u> 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
- $\blacksquare Click on the + to open the folder$





LTH Counting Reports: When you click on the <u>LTH Counting Reports</u> 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):

Business Objects					Welcome:	minnesota_liv
💱 🛄 🖬 + 🗋 New - 🕉 💥 Send + 🖽	Illy InfoView	Search tile +				lb
Folders H	LTH Counti	ng Reports				¥ (
🔁 😂 🕾 🖏 🚘 🎦 🗙	al Organiz	e 🗙 🗙 Filter: All Types 👻				
E SHome		Title *	Last Run	Туре	Owner	Instances
E Ca My Folders	🗆 🔊 +	LTH_Current Household Residence	Never run	Web Intelligence Document	minnesota_live:Sharon	0
E Public Folders		History Schedule Modify Properties				
H 🔚 ART Documentation	L	116/2007.				
H 🔚 ART Report Templates	🔲 🔊 🔹	LTH_Current Income	Never run	Web Intelligence Document	minnesota_live:las1	0
E iminnesota_live_folder		History Schedule Modify Properties 01/05/07 Counting				
Ascension Place						
Barriers Report	0.00	LTH_Demographics	Never run	Web Intelligence Document	minnesota_live:las1	0
B Bowman Test		12/06/06-Send to MHFA				
ERCP		1754 EnterPaire EF	Managana	Web Intelligence Desurged	minesets Fredera	
in The SP	10 a °	LTH_Entry Data_EE History I Schedule I Modify I Properties	Never run	web intelligence Document	minnesota_ive.tas1	U
III DESP Counting Reports		10/16/2006 Run for MHFA				
ESP Data Check Reports	D a •	LTH Exts	Never run	Web Intelligence Document	minnesota ilue/Sharon	0
EHPAP	- • ·	History Schedule Modify Properties		into intelligence o countelle	in the set of the set of the set	
🗑 🧫 General Use Reports		Modified 1/4/2007 First posted: 11/08/2006				
B CLTH	🗆 🔊 🔹	LTH_Housing Cost and Subsidy	Never run	Web Intelligence Document	minnesota_live:Sharon	0
LTH Counting Reports		History Schedule Modify Properties				
E 🔚 LTH Data Check Reports		Posted 1/16/2007				
E Salvation Army	🗆 🔊 +	LTH_Length of Subsidy	Never run	Web Intelligence Document	minnesota_live:Sharon	0
m Carutina Reports		History Schedule Modify Properties				
m THP Counting Reports		Cast optimeter in rolevy0				
R C Wilder in progress	🔲 🔊 ÷	LTH_Services	Never run	Web Intelligence Document	minnesota_live:las1	0
		History Schedule Modify Properties 01/05/2007 - Services, length of services				

Data checking reports

Click on the <u>LTH-Data Check Reports</u> 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.

Business Objects							Welcome: min	nes
😵 🔟 • 📄 New • 🍄 🔀 Send • 🖽	Hy I	nfo'Vi	ew	Search title +				
Folders H	LT	I Dat	a Cl	eck Reports				
🔁 🖻 🌮 🖾 🔛 🖕 🗙	2	Org	anize	• • 🗙 Filter: All Types •				
E Stome		D	$\hat{\varphi}$	Title *	Last Run	Туре	Owner) In
My Folders		۵Ì	Φ	LTH_Current Household Residence_Data Check	Never run	Web Intelligence Document	minnesota_live:Sharon	0
Public Folders				History Schedule Modify Properties 1/16/2007: Renamed Current Household residence: Last update	d 1/16/2007:*	1/08/06 TEST - continue testing. Last	updated 12/5/05.	
ART Documentation		_						
ART Report Templates		(۵	-\$	LTH_Current Income_DataCheck	Never run	Web Intelligence Document	minnesota_live:las1	0
E iminnesota_live_folder				01/05/07 Data check client detail LTH income data				
Ascension Place		-						_
Bamers Keport	Р	<u>a</u> 1		LTH_Demographics_DataCheck History Schedule Modily Properties	Never run	Web Intelligence Document	minnesota_live:las1	0
Bowman Test Dus Youth Transitions				12/06/2006.Data check client detail for LTH Demographics & dis-	abilities			
ESGP		ລ		LTH Entry Data DataCheck	Nevernin	Web Intelligence Document	minnesata liveriast	0
E ESP	1			History Schedule Modify Properties	1001011011	thes intelligence bostantelik	Interesting_inerge (
ESP Counting Reports				10/03/2006. Data check client detail LTH entry data				
ESP Data Check Reports		ລ	-	LTH Exits DataCheck	Never run	Web Intelligence Document	minnesota live:Sharon	0
E FHPAP	1			History Schedule Modity Properties				
🖽 🚞 General Use Reports				Modified 1/4/2007 First posted: 11/08/2006				
E LTH		ລ	+	LTH_Housing Cost and Subsidy Data Check	Never run	Web Intelligence Document	minnesota_live:Sharon	0
LTH Counting Reports	1			History Schedule Modify Properties				
LTH Data Check Reports	⊢			Updated & reposted 1/16/2007;Updated 1/4/2007; Hirst posted: 1	1/30/2006			
Salvation Army		۵Ì	Φ	LTH_Length of Subsidy Data Check	Never run	Web Intelligence Document	minnesota_live:Sharon	0
m Caustine Provide				History Schedule Modify Properties				
m im THP Counting Reports	⊢			Cast opdated 1/10/2000				
m > Wilder in progress		۵	Φ	LTH_Services_DataCheck	Never run	Web Intelligence Document	minnesota_live:las1	0
				Mistory Schedule Modify Properties 01/05/07 Data check client detail LTH services				
	<u> </u>							

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:

		 Neiresri Da
Pro	npts	×
Repl	y to prompts before running the query.	
~	Enter effective date : 8/29/2006 12:00:00 AM	Run Query
×	Report Start Date	
×	Report End Date	Cancel
~	Service Provide Provider In list: : Rise Emergency Services: Shelter(776)	
	Enter effective date	
	Enter effective date 8/29/2006 12:00:00 AM	
	Enter effective date 8/29/2006 12:00:00 AM	

Enter the information for each prompt. Once you have data in the box, the red X becomes a green \checkmark 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 <u>do not</u> 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)

	npts 🖂
Reply	to prompts before running the query.
~	Enter effective date : 8/29/2006 12:00:00 AM Run Guery
×	Report Start Date
×	Report End Date Cancel
\checkmark	Service Provide Provider In list: : Rise Emergency Services: Shelter(776)
4 AC AC AC AC AC AC	ACCAP Transitional: Anoka West Apartments(412) CAP Transitional: Anoka West Apartments(412) CAP Transitional: Ferry Street Shetter(409) CAP Transitional Housing(408) CAP Transitional Housing: City View(647) CAP Transitional: Ramsey Townhomes(410) CAP Transitional: Single Family Housing(411) vocates for Family Peace: Housing Programs(81)

- 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 \checkmark will be green (or when you have updated information in all prompts). Click on RUN QUERY.

jal	Pron	npts	×
	Reply	to prompts before running the query.	$\langle \rangle$
	~	Enter effective date : 10/01/2006	Run Query
	~	Report Start Date : 07/01/2005	
	~	Report End Date : 09/30/2006	Cancel
	~	Service Provide Provider In list: : Wilder Research Center(1)	

VIEW REPORTS

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

	/			
- II TH Evit Report FE odfi	off Totomot Evel	oror		
2 Dusinessobjects Infoview - Microso	on internet Exp	lorer		
File Edit View Favorites Tools Help	- 1			
Search	🏑 Favorites	🔊 - 🍣 🖂 🧖	12	
Address https://report1.servicept.com:8443/b	.sinessobjects/enterpr	ise11/desktoplaunch/In	fo/view/lagon/lagon.do?token=RE	PORT1@3E 🔹 🔁 Go 🛛 Links 🎽
BUSINESS OBJECTS'				Welcome: minnesota_livedmclain
🌮 🔝 🗋 New + 🌫 🔀 Send + 🖽 My InfoView	Search title +			🖹 👌 🙆
				EBX
🚹 Document + View + 🔛 Save 🌺 Find 🛞 U	Indio 🛞 Redio Zoom 1	100% • H 4 1	л № Н	🕉 Refresh Data 🔍
LTH Exit Report - Length of Stay				*
Service Provider (s)				
Wilder Research Center(1)				
Report Period: 07/01/2005 to 9/30/00				
Devent Deve Date: 4040000				
regent rout base: 1010/08				
Clients Still in Program				
		% of Households &		
	Head of Household & Singles	Singles Still in Program		
Less than 1 Month	- Sangres	100.00%		
1 - 3 Months	0	0.00%		
3 Months - 1 Year	0	0.00%		
1 Year or Longer	0	0.00%		-
I				•
Eason leav	ing Program 📔 👫 Re	ason leaving Residence	Reason Subsidy Ended	Destination-Tenure-Subsidy
Discussions				expand 💽
Done .				🕑 Internet 🖉

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: 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.

PurinerrObjectr Infel/Jaw - Microsoft	Internet Evol	oror		
Sciencessocial Structure - Microsoft	Internet Expl	orei		
But view raiones toos nep			- 44	
Back 🕈 💟 * 본 🖀 🚱 🎾 Search 🍾	🎖 Favorites 😸	🔁 • 🥯 🔁 🔽	_ 10.	
dress 🗃 https://report1.servicept.com:8443/busir	nessobjects/enterpri	se11/desktoplaunch/	Info/view/lagon/logon	.do?token=REPORT1@38💌 🛃 Go 🛛 Links
USINESS OBJECTS'				Welcome: minnesota_livedmc
: 🔟 🗋 New 🔹 🌝 Send 🔹 🔣 My InfoView :	Search title 🔹			🗈 🤌 🤅
Document + View + 🗐 Save 👬 Find 🛞 Undo	🕢 🛞 Redo Zoom 1	00% • H = 1	л н н	🌝 Retresh Data 🛛
Est at Charles				
Save Igth of Stay				
Save as				
Save to my computer as Excel				
POP				
Percet Period 07/01 CSV 000				
Report Run Date: 10/18/06 Clients Still in Program				
H	ad of Household & Singles	% of Households & Singles Still in Program		
Less than 1 Month	4	100.00%		
1 - 3 Months	0	0.00%		
3 Months - 1 Year	0	0.00%		
1 Year or Longer	0	0.00%		
•				<u> </u>
🗄 🕻 🕨 💾 Length of Stay 🔡 Reason leaving	Program 🛛 🛃 Re	ason leaving Residen	ce 📔 🎦 Reason Sul	vsidy Ended 🔰 🎦 Destination-Tenure-Subsid

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 <u>Vicki.farden@state.mn.us</u>
- For HMIS and ART technical questions, contact the HMIS help desk:
 Phone 651-280-2700 and ask for HMIS help, or email <u>hmis@wilder.org</u>

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.
 - o <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).

- <u>Disability</u>: 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:

- <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.
- Information entered in the <u>Universal Assessment</u> will automatically appear in the corresponding fields in the <u>LTH Assessment</u>. You need to add the following information:
 - Military Service Related Disability? (for head of household age 18 and older)
 - <u>Address and Unit Information</u>: Client's Residence (complete at entrance when participant moves into housing and when they move and/or exit the program).
 - <u>Housing Cost and Subsidy</u> 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. <u>Make sure to complete all the fields describing the reason for leaving and destination</u>.

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

2. Update Housing Subsidy

- In the <u>Housing Cost and Subsidy</u> section (of the MN Ending LTH Assessment), click on the pencil next to the current housing subsidy. A new window will open.
- <u>Reason for subsidy ending</u>: From the dropdown box, select the reason the participants housing subsidy is ending.
- <u>End Date</u>: 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.