Cambridge HMIS Working Group

May 23, 2023

HMIS Working Group Agenda, May 23, 2023

- Introductions

- Announcements

- Compliance update for HMIS Lead

- Reporting updates – PIT/HIC and SPMs

- FY 2024 Data Standards overview and roll out plans

- Voting – Data Sharing adaptation for Housing Navigators

- Data Element Spotlight: 3.10 Project Start Date

- Future voting topics

Introductions

Welcome!

Announcements

Planning & Development (P&D) Announcements

- Upcoming annual CoC Program competition - Notice of Funding Opportunity (NOFO) from HUD

- CoC Newsletter to begin next month! Subscribe here! Send announcements, updates or other content requests to cambridgecoc@cambridgema.gov

- Future HMIS trainings in person - update

Shelter Announcements

- Salvation Army Shelter remaining open through City funding begun in 4/2023. Funding will continue in FY 24

- Shelters that recently closed for the season:
  - Cambridge Warming Center (CASPAR/Baycove)
  - Harvard Square Homeless Shelter (Phillips Brooks House Assoc.)
  - Y2Y

- New Family Shelter!
  - Mass. Ave. Congregate – operated by Hildebrand, part of the Emergency Assistance (EA) family shelter system under Dept of Housing and Community Development (DHCD)

- Upcoming – Harvard Square Summer Shelter
  Changes to 2023-24 Season for HSHS

Cambridge Coordinated Access Network (CCAN) Announcements

- Staff updates

- HUD technical assistance

- Recorded training release for new CCAN assessors

- HUD Peer workshop

- Policies & Procedures

- Pilot with Rehousing Data Collective/Collecting ROIs for warehouse access

- CE Working group

Compliance Updates

Refresher trainings, DQ Improvement, etc.

Requirements from HMIS Lead for Compliance

Refresher Training

- Annual basic training re-certification for all

- Annual Privacy and Security re-certification for all

Publish a comprehensive CCAN HMIS Data Guide

Updates to Governance documents

- Policies and Procedures

- Participation Agreements

- Privacy Policy and Security Plan

Update to Data Quality Improvement Plan

The CCAN HMIS Data Manual

HMIS Workflow guide for CCAN based on new P&P and updates to HUD CE data elements. Contents to include workflow steps based on different CE partner roles:

- For Assessors

- For Navigators

- For Stabilization workers

- For CCAN Manager and Specialists (at MSC)

- For Providers (agencies receiving referrals)

- For Shelters

A significant update to what currently exists in separate documents on website:
cambridgecoc.org/ccan

Looking Ahead for HMIS Tasks Summer and Fall

- Training and roll out of new CCAN assessors

- Configuring software changes based on new data standards (system admin tasks)

- Training content, registration and roll out for 10/1/24 go live

- Separate CE training on 4.21 data elements, including Prevention activity

- Creation of CCAN HMIS procedures manual

- August/September Reports – ESG CAPER and HMIS APR

- Assistance with CoC competition

- Privacy and Security training update/refresher (recorded)

- Revisions to Governance Docs, DQ Improvement Plan, etc.
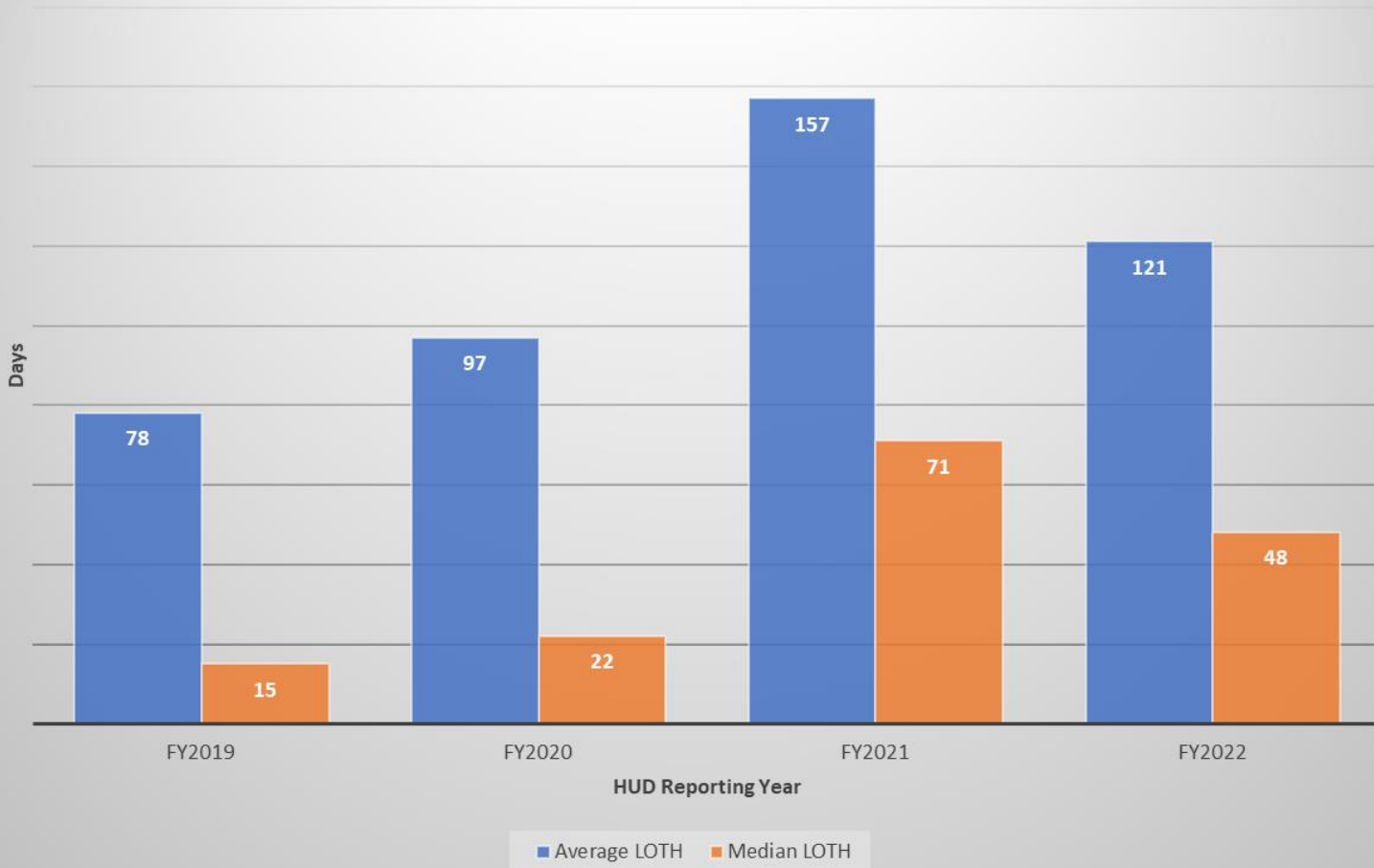
HUD Reporting Updates

HIC & PIT, SPMs

2023 Point in Time Count

Cambridge completed the 2023 PIT count overnight between Wednesday, Jan. 25 and Thursday, Jan. 26, 2023. The total count was 474 persons experiencing homelessness:

- 269 individuals staying in emergency shelters and transitional housing programs;
- 72 persons (29 families) staying in family shelters;
- 59 persons (21 families) staying in transitional housing; and
- 74 unsheltered individuals

Cambridge Point-in-Time (PIT) Count, Jan. 25, 2023

Sheltered Individuals
269
57%

Unsheltered Individuals
74
15%

Sheltered Families
131
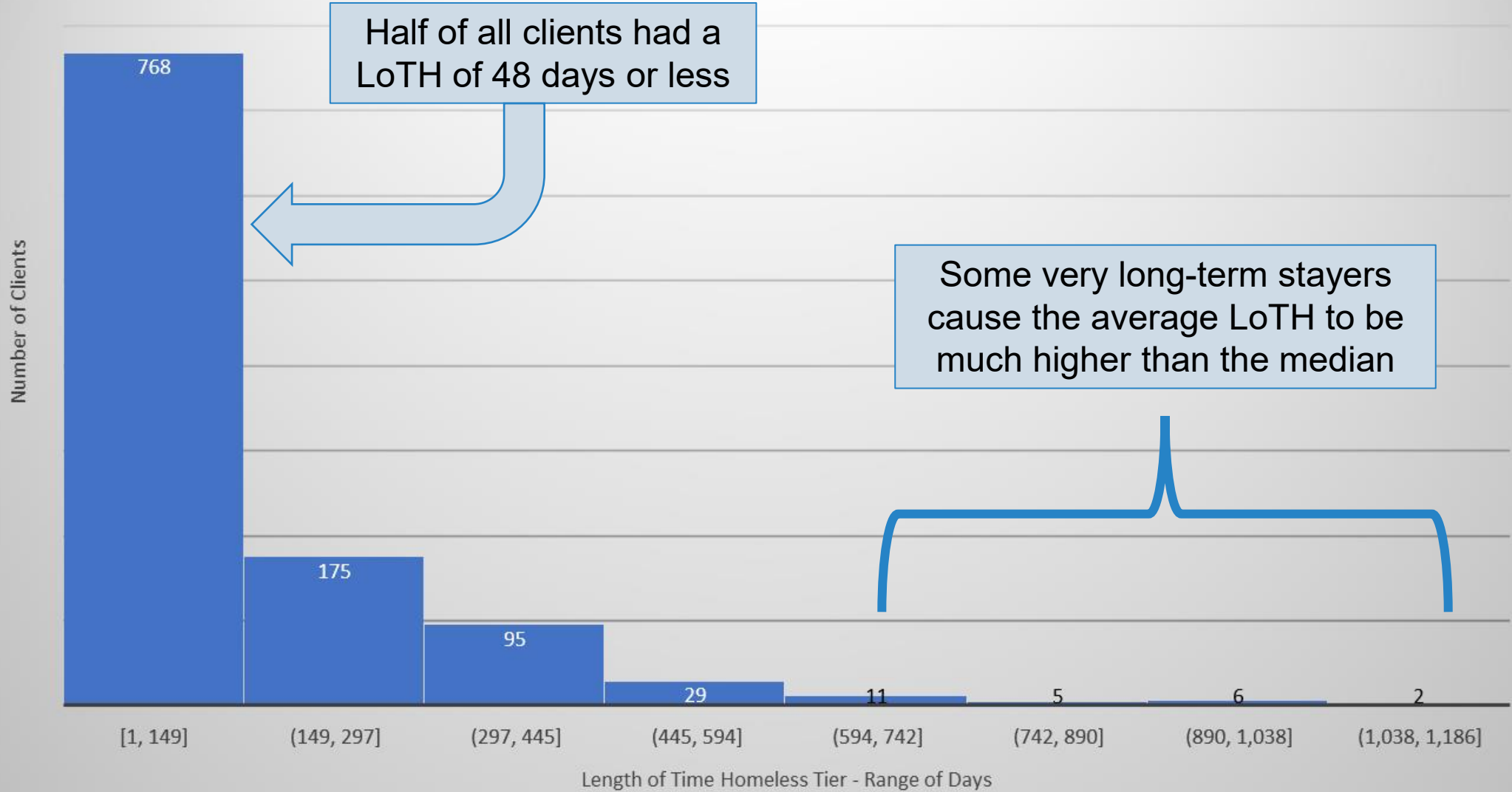28%
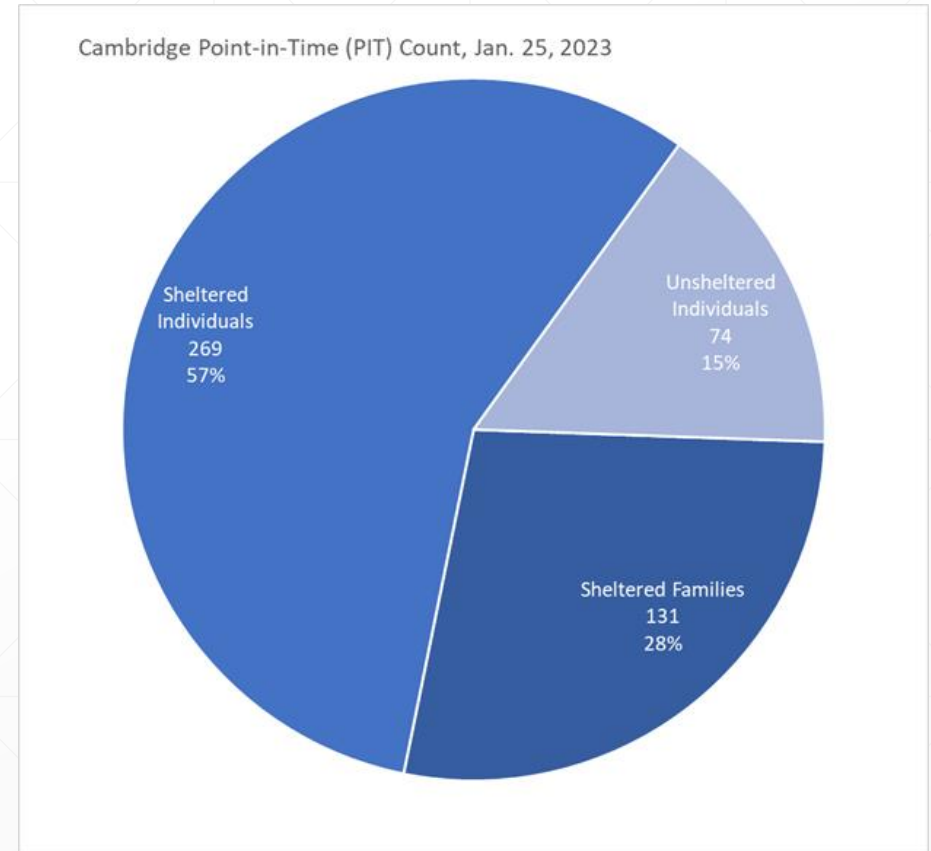
Measure 1a1: Length of Time Homeless in ES

HUD System Performance Measures

**1a1: Length of Time Homeless in Emergency Shelter**

This includes time homeless during the report period date range as well as prior to the report start date. It does not include self-reported 3.917 Prior Living Situation information

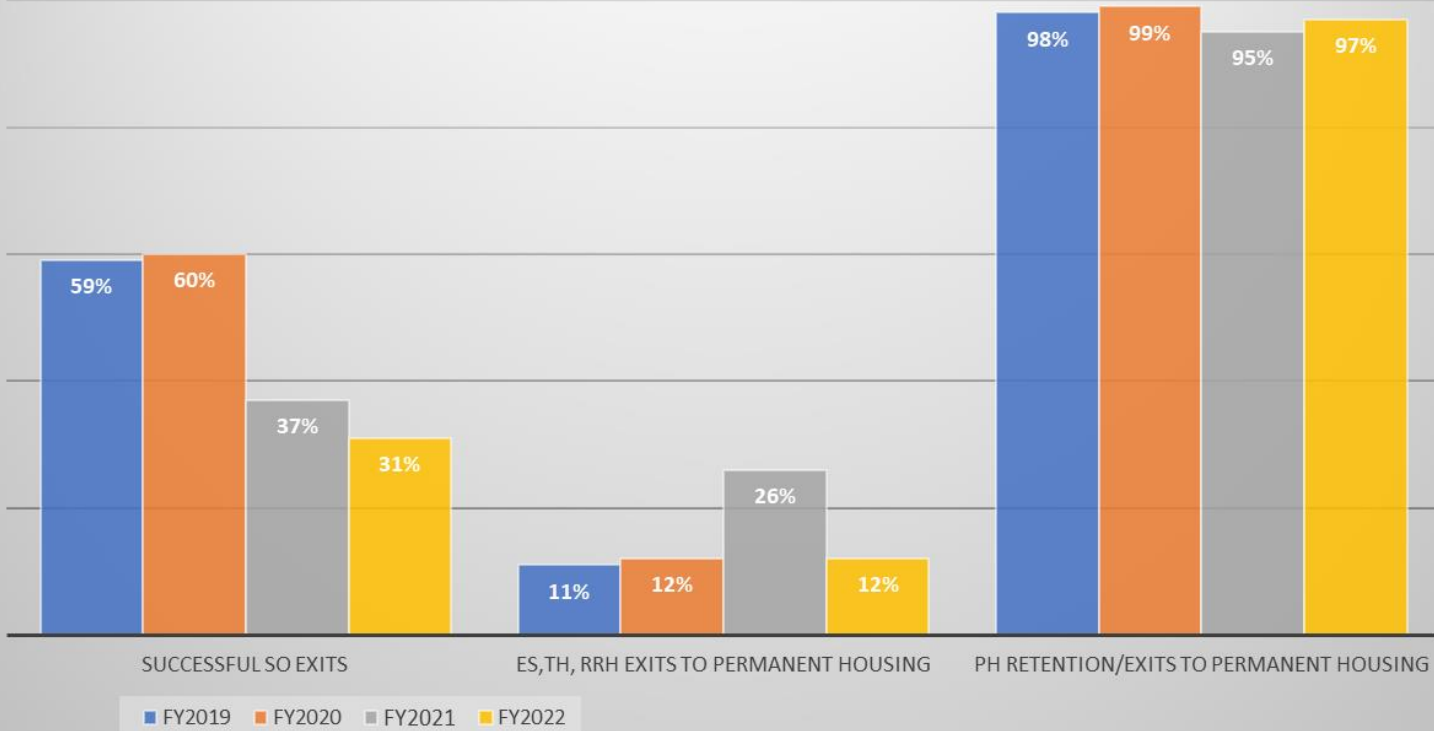HUD Fiscal Year: 10/1/2021 - 9/30/2022

FY22 saw an uptick in number of shelter enrollments of less than one week after significant drop in FY21 as a result of Covid protocols

— Number of Enrollments Less than One Week   — Number of Unique Clients
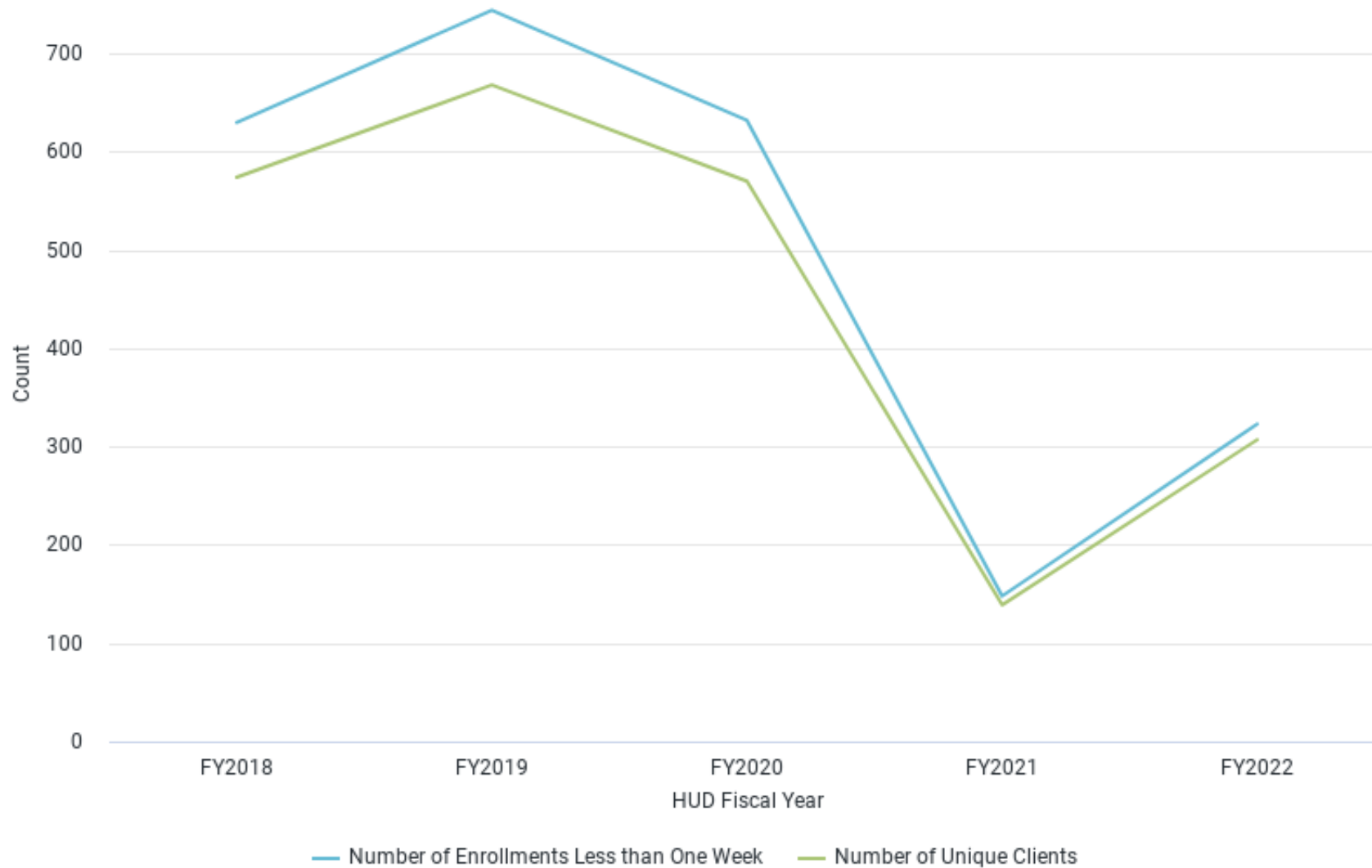
Measure 7: Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing

HUD System Performance Measures

Measure 7: Successful Placement from SO and Successful Placement in or Retention of PH

Successful placement from SO includes any sheltered or housed destination except for jail. Hospital and halfway houses are not considered negative or positive outcomes

Missing Street Outreach Destination Rate Over Time

Destination Error Rate

67.30% (FY18)
59.50% (FY19)
65% (FY20)
34% (FY21)
33% (FY22)
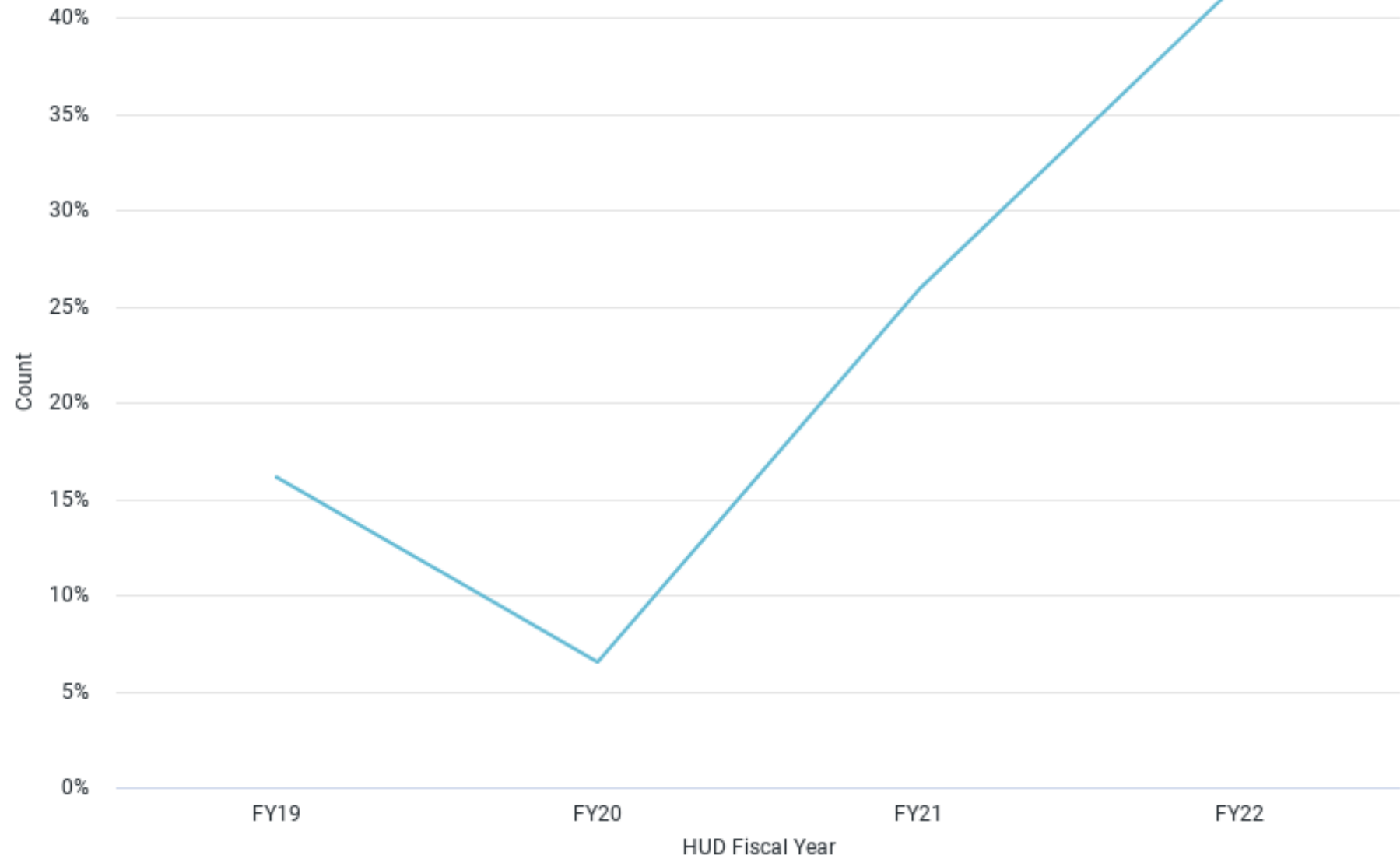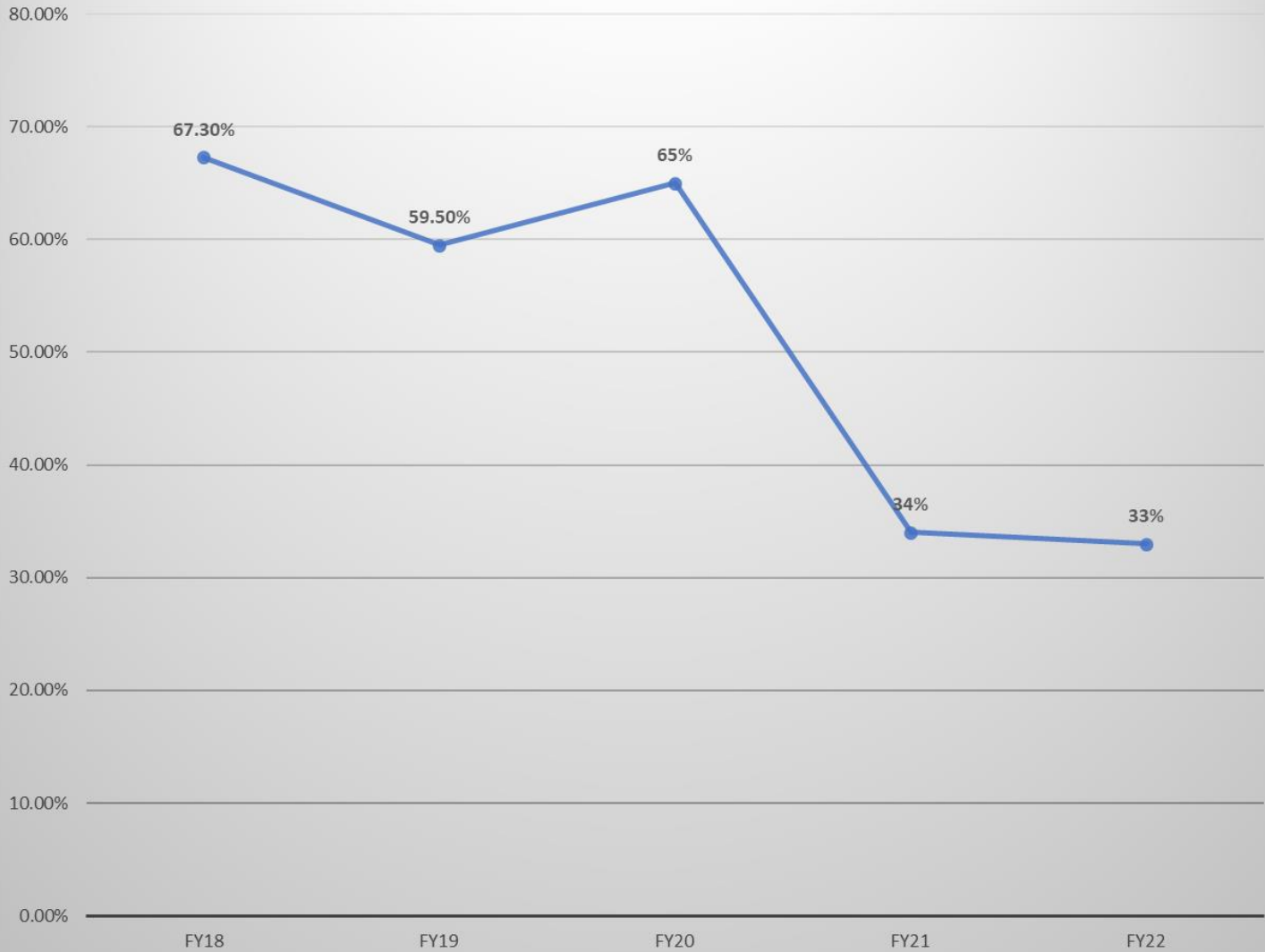
SPM Data Quality: Destination Error Rate over Time

Destination errors include responses of No Exit Interview Completed, Data Not Collected, Client Doesn't Know, and Client Refused

This shows missing destination rate for all projects included in SPMs

FY 2024 Data Standards

What to expect and when

FY 2024 HMIS Data Standards Manual

A GUIDE FOR HMIS END USERS AND HMIS LEADS/SYSTEM ADMINISTRATORS

https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual-2024.pdf

Summary of Changes

New Data Elements

- Adding Translation Assistance field for HoH for all CoC and ESG funded projects
  - Translation Assistance Needed = yes/no
  - Preferred language = selection from dropdown list

- Adding Sexual Orientation for CoC PSH funded projects
  - All HoHs and adults at project start

Only last 4 digits of SSN

- Changing to ONLY require the last four digits of the SSN for CoC, ESG and PATH funded projects.

- The SSN element on the profile screen will still retain full field to record all nine digits.

- Intake staff should verify that an SSN in system for client is accurate if that client already has an existing record.

- Locally a CoC can make other determinations and still require the full nine digits

Redesign of Gender Field

Response descriptions

Field Name	Response/Data Type	Description
Gender	Woman (Girl if child)	Client identifies as a woman, or girl in the case of a child under the age of 18.
	Man (Boy if child)	Client identifies as a man, or boy in the case of a child under the age of 18.
	Culturally Specific Identity (e.g., Two-Spirit)	Client identifies with an identity that is exclusive to a particular culture. For example, Two-Spirit refers to a Native North American gender identity.
	Transgender	Client identifies with a transgender history, experience, or identity.
	Non-binary	Client does not identify exclusively as a man or a woman.
	Questioning	Clients who may be unsure, may be exploring, or may not relate to or identify with a gender identity at this time. Note that "Client doesn't Know" is different than "Questioning". "Questioning" is about exploring one's gender identity. "Client doesn't Know" should only be selected when a client does not know their gender from the options available.
	Different Identity	Client identifies with another identity that is not listed as a response. A text box is provided for additional detail.
	Client doesn't know	"Client doesn't know" should only be selected when a client does not know their gender from among the responses. "Client doesn't know" should not be used in conjunction with any other response.
	Client prefers not to answer	"Client prefers not to answer" should only be selected when a client chooses not to identify their gender from among the

Other changes to wording and/or display

- Client Name field – data collection instructions have changed to indicate that "legal name" is not required unless required by a funder. If not, client can use their preferred name

- Replacing "client refused" with "client prefers not to answer" in all elements where the former is an answer choice

- Approximate Date Homelessness Started will change to Approximate date *this episode* of homelessness started

- Substance abuse disorder services/treatment will change to Substance use services/treatment

More changes to wording/display

- Merging Ethnicity into Race element and adding new race option: Middle Eastern or North African

- Rental Subsidy Type – removing all Living Situation answer choices that read: "rental by client with X subsidy" and replacing with one main choice:

  "Rental by Client, with housing subsidy"

  If this answer is chosen there will be a <u>follow up field</u> with a list of more specific subsidy types, including HCV voucher, Public Housing Unit, RRH, Perm. Supported Housing, etc.

Retired Data Elements

3.05 Ethnicity (merging with Race)

4.19 Coordinated Entry Assessment and 4.20 Coordinated Entry Event (mapped to new element 4.21)

Wellbeing questions (CoC funded screens) has been removed

New project descriptor – Rapid Rehousing Subtype

Rapid Re-Housing Projects

Beginning in the FY 2024 HMIS Data Standards, Rapid Re-Housing (RRH) projects can be classified in one of two subtypes – *'Services Only'* or *'Housing with or without services'*. Select only one subtype per RRH project. The *'Housing with or without services'* subtype must be selected if the project receives *any* ongoing rental funds, even if not all project participants receive housing assistance funds from the RRH project. *Only* select the *'Services Only'* subtype if the ongoing housing assistance for all program participants is provided by another funding source (e.g., Housing Choice Voucher, HUD VASH, other RRH project). If a RRH project has a *'Services Only'* subtype, no inventory records should be created in *Bed and Unit Inventory Information.*

If a project at any point changes from one subtype to another, the project information record must be closed and a new record opened with the new subtype identified.

Coordinated Entry Data Elements

2.09 Coordinated Entry Participation Status - NEW

- Designed to identify a project's type of role in the local Coordinated Entry System.

- Is project a CE Access Point? Yes/No

- Type of Access Point activity - Prevention, Shelter Assessment, Housing Needs assessment, diversion, problem solving

- Does project receive CE referrals? Yes/No

Coordinated Entry Data Elements
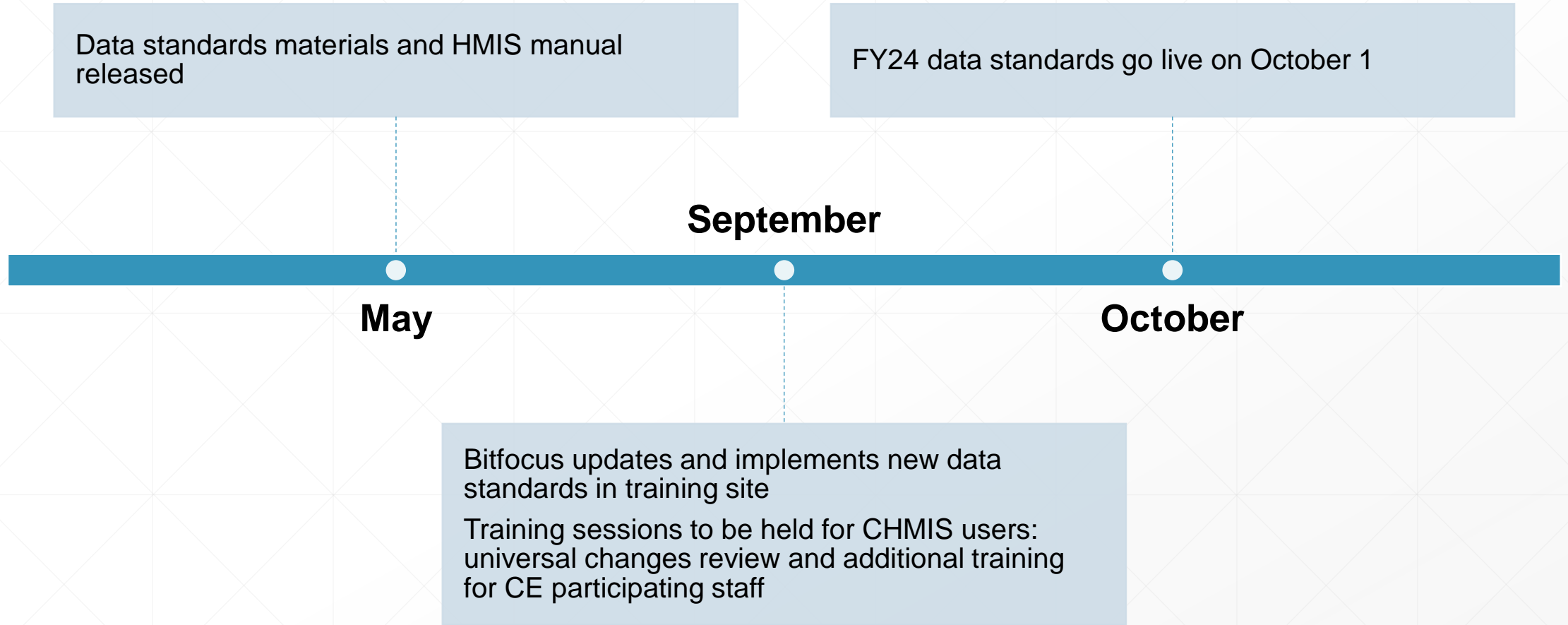
4.21 Coordinated Entry Activity

The Coordinated Entry (CE) Activity element is designed to capture any CE activities associated with screenings, assessments, or referrals that occur as part of an interaction between a client and the Coordinated Entry System (CES). Furthermore, each record of a CE activity that occurs is accompanied by an associated outcome.

Combining the CE activity along with a corresponding outcome is intended to improve a CoC's ability to analyze the frequency any particular activity type is occurring with a client and the outcome of these interactions/activities.

Training Content

What to expect and when

FY 2024 Data Standards Release Timeline

Data standards materials and HMIS manual released

FY24 data standards go live on October 1

September

May

October

Bitfocus updates and implements new data standards in training site

Training sessions to be held for CHMIS users: universal changes review and additional training for CE participating staff

Content Sources

From HUD

- [Client-Centered Approach to Recognizing Gender Identities in Data Collection](#)

- [Client-Centered Approach to Recognizing Race and Ethnicity Identities in Data Collection](#)

- Data entry for FY 2024 Data Standards Update (not yet released)

From CHMIS

- General trainings on data standards updates for all users – multiple sessions

- Trainings on new CE data elements and workflow for relevant staff

- Workflow guides and videos posted on our website

- Brand new HMIS Beginner Training materials, updates to existing workflow guides

Impacts of these changes

- Most training material needs to be updated

- Expansion of CE data elements to include Prevention and more follow up expected on referral outcomes is more work for CCAN and partners

- A fair amount to synthesize and a big lift for everyone who has a role in HMIS – vendor, HMIS Leads, Agency Admins and front-end users

- Changes to standard HMIS data sets (.csv files) for data migration may be challenging in beginning

Vote for Best Visibility Solution

Problem: Some providers working with CCAN clients are limited in view/edit of referral pages

A review of Cambridge HMIS sharing settings

EDIT SHARING GROUP CHMIS DEFAULT GROUP

Name	CHMIS Default Group
Clients Created	Full Shared ⌄
Service/Programs/Assessments/Events Placed (includes Referrals)	Basic Shared ⌄
Notes	Not Shared ⌄
Files	Full Shared ⌄
Location and Contact tabs	Full Shared ⌄

Basic shared: allows staff across agencies to see that data has been entered, but they're unable view or edit specific data points, such as answers within assessment screens.

Because **referrals** are always created from **assessments**, the sharing settings for both are grouped together.

Problem: CE navigators can't view/edit referral notes for their clients if the assessment was recorded by an agency they don't have access to ("Referring agency")

Expand sharing settings
Change Program/Assessments/Events to "Full Shared" systemwide or through a sharing group that would be applied to all CCAN-participating agencies

Record all assessments under CCAN enrollment
Users will switch to Coord Access agency, create an enrollment, and record the CE assessment under that enrollment

Referral-only access role
Give navigators access to all CCAN-participating agencies with limited referral-only access role; when users can't see referral notes they switch to the "Referring Agency"

Product enhancement
Request made to Bitfocus to include referral notes under "Basic Shared" using a Referral Notes toggle under access roles

Expand sharing settings notes
- Big change; will require an HMIS Working Group vote
- Enrollment responses are visible and will cascade across agencies
- System adjustment because of software limitations
- Could create data quality problems, specifically accuracy
- No extra burden for end users; minimal change in workflow
- All CE and other custom screens will be visible across agencies.
- Flexibility for future system changes
- CE assessments can be recorded under ES programs

Record all assessments under CCAN enrollment notes
- Another ask: requires staff to do more than twice the data entry
- Staff will have to make a new enrollment, copying ES enrollment data (if recent) or recording new responses, and record a CLS
- Requires more technical skills: switching agencies, using multiple browser tabs
- All referrals will come from Coord Access agency
- Doesn't require any backend configuration changes
- Complicated - requires the most additional training of all options

Referral-only access role notes
- Extra step: users will need to switch agencies and know when it's necessary to do so
- Users might only need to do this for a fraction of their clients - rare scenario
- Much less of an ask compared to creating Coord Access enrollments
- CE assessments can be recorded under ES programs
- Smallest change in plans should Bitfocus update sharing
- Would not need to re-train or change process if BF makes changes to sharing
- Easy backend setup
- CCAN HS navigators will still need CCAN enrollment, to be completed by CCAN staff

Product enhancement notes
- Would require no change in workflow
- Not guaranteed to happen; if it does, it won't be anytime soon
- Emma: small potential this could happen sooner if we pay them
- Bitfocus planning on sharing overhaul (long process)

Considerations:
- HUD Data Standards changing Oct 1, 2023
  - New 4.21 CE Activity combo of CE Assessment and CE Event

Training site demo of referral only access role for navigators:

Vote

Please vote in the chat yes or no to accept the
referral only access role option
If voting no, please list preferred option –
expand sharing settings or
record all assessments under CCAN

Voting Results

	Agency	Yes	No	Absent
1	ACEDONE	✔		
2	Baycove	✔		
3	CCAN	✔		
4	Fenway			✔
5	First Church			✔
6	Heading Home	?		
7	HomeStart	✔		
8	Cambridge MultiService Center	✔		
9	Phillips Brooks House Assoc.	✔		
10	Salvation Army	?		
11	Y2Y			✔
	Total	6	0	3

Data Element Focus

Project Start Date

3.10 Project Start Date

To determine the start of each client's period of participation with a project. All projects need this data element for reporting time spent participating in the project by a given client. Paired with 3.20 'Housing Move-In Date', it becomes possible to determine the length of time from project start to housing placement for all clients accessing permanent housing.

From HUD HMIS Data Manual 2024

When to enroll?
Guidance varies depending on project type

There are differences in what it means to "start" participation in a project, depending on the type. E.g., Shelter, Permanent Housing, etc.

Street Outreach enrollment start date = First date of contact with the client

Emergency Shelter start date = the night the client first stayed in shelter

  Night by night shelters have clients re-enter the shelter without exiting or re-enrolling within a certain amount of time ~90 days

Transitional Housing start date = Date of client's first night in project

Permanent Housing (and RRH with Housing) start date = Date the client was determined eligible (more on next slide)

Services only projects – RRH (Services only), Homelessness Prevention, Coordinated Entry, etc. = Date staff began providing services to client.

Closer Look – Enrolling in a Housing Program based on a Pending Referral from CCAN

Permanent Housing, including Rapid Re-Housing:

Date the client was determined eligible. This indicates the following factors have been met:

- ✓ Information provided by the client or from the referral indicates they meet the criteria for admission

- ✓ The client has indicated they want to be housed in this project; and

- ✓ The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, or scattered-site subsidy) or expects to have one in a reasonably short amount of time.

Request to Housing Providers/Referral Recipients

- Do not wait to enroll clients with pending referrals who meet the criteria for enrollment

- Backdating an enrollment date and/or a housing move-in date creates multiple problems, including:
  - Partner agency staff also working with the client are not able to see current status of client and their referral, etc.
  - Local and HUD reporting at various times of year will not represent accurate info within a reporting period if data entry was not completed for accepting a referral/enrollment and recording housing move-in dates

- The same timeliness applies to denying a client from a pending referral – delaying the data entry transaction will prevent someone else from being matched to that opening/vacancy

New Clarity feature – preferred pronouns

Collection of ROI for participation in Rehousing Data Collective (RDC) – implement to client intake process across agencies? – pending RDC guidance

Continue to require full SSN on intake?

Establishing an official cut-off date/# of days for exiting due to inactivity for Night-by-Night shelters

Future Voting Topics

More information will be sent in advance of next meeting

Next Working Group – early August

How do you feel about meeting in person?

Meetings in the Future!

Thank you!!!