Global Visibility Best Practices Using a Shared System

January 21, 2026

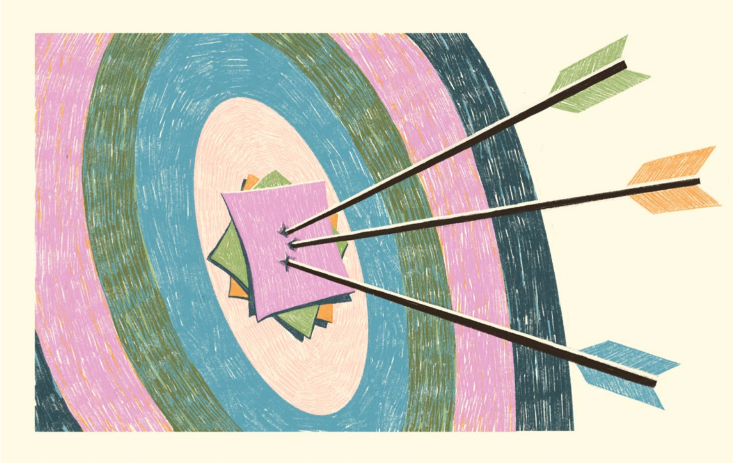
Chicago CONTINUUM of Care

Agenda

- Data Integrity
- Search Discipline
- Accurate Enrollments
- Assessment Quality
- Timely Entry
- Resources
- QA

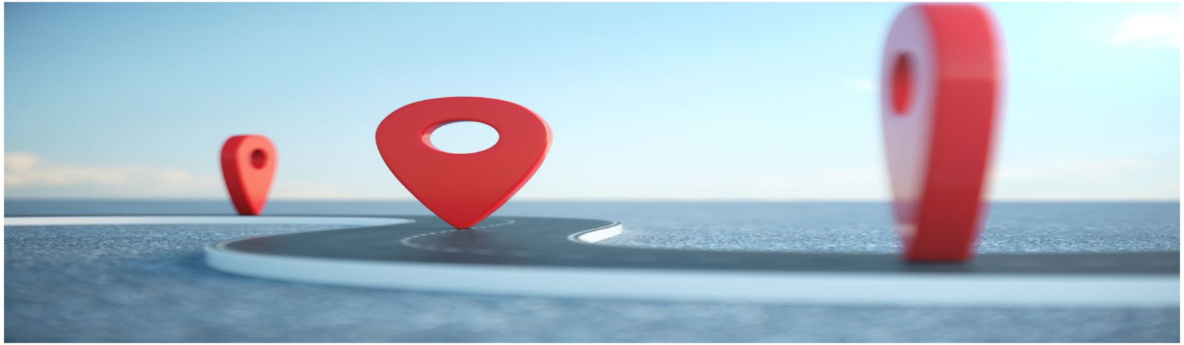
Data Integrity

Global Visibility goes live on February 3rd. From that date forward, data entered for unlocked clients is shared across agencies, while pre-rollout data keeps its original visibility. In practice, treat the record as the client's shared story. What is entered should reflect what is accurate for the client, not an agency specific version of events. Because key objects (profile, enrollments, assessments) are visible globally for unlocked records, ensure that data entries are accurate and preserve the timeline so the most recent, visible answers can prefill correctly for others.



Update in the Right Place

In HMIS, an enrollment is the client's story for that specific project period. It begins at entry, captures what happened during the stay, and closes at exit. Other providers read that story to understand the client's journey, and with Global Visibility, that story is now shared across agencies for unlocked records. Keeping data accurate means recording changes in the right part of the enrollment so the records remain consistent and data flows accurately



Chicago CONTINUUM of Care

Coordinate Before Correcting

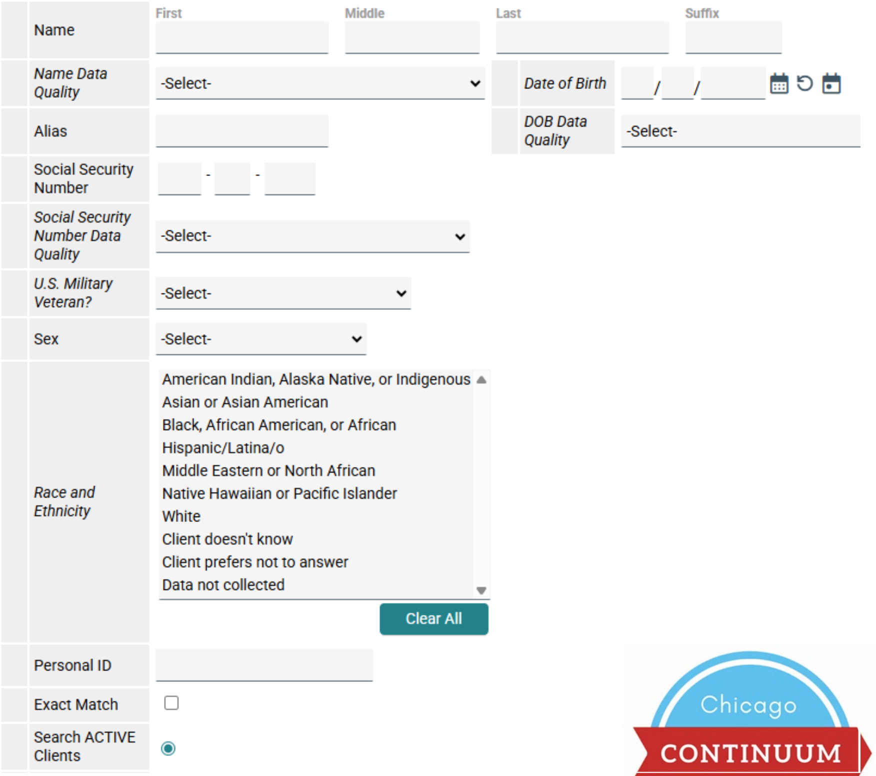
In a shared system, when you see or encounter conflicting assessment answers, an enrollment that looks wrong, or an overlap (a client shown as active in two places at once), contact the other agency first and decide together what should change. Use the ATA Resource List to reach the right point of contact, agree on who will update which part of the record (assessment item, entry/exit, exit destination), then make the change so the shared record reflects the client's accurate story.

- Use the ATA Resource List to email their ATA; include Client ID, what the issue is (Exit Date, Assessment values, or HMID), your proposed correction, and a target date. If unresolved, submit a Helpdesk ticket and reference the outreach.

Chicago CONTINUUM of Care

Search Thoroughly

In a shared system, every interaction starts with a detailed client search. With Global Visibility, new unlocked clients are visible across agencies, so you will begin to see more potential matches after roll out date. Be precise before you create new clients. Run a complete search using exact and variant spellings of the reported name, then pair that with DOB and SSN (when available) and any other known fields to locate the correct record and keep the client's story in one place.



Handling Duplicates

When you find the same client under multiple profiles, pause new data entry and consolidate through a Client Merge Request (submitted by ATAs). Merges are permanent, so verify identity first; if the client appears active at more than one project, coordinate to resolve open enrollments before the merge. A client can't be in two places at once.

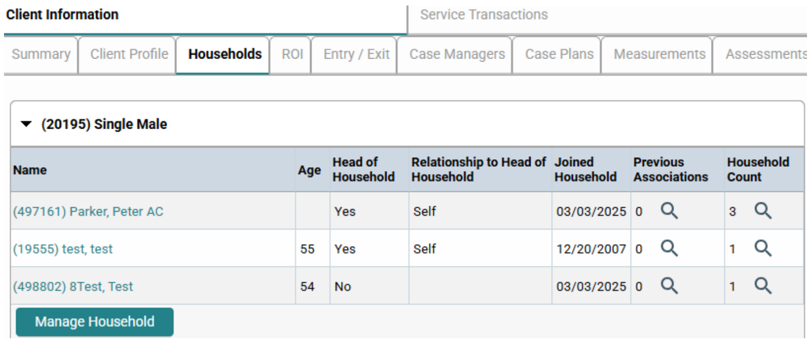
- Before you request: Confirm identifiers match (name, DOB, SSN/last 4
- Include in the request: The Surviving Client ID, the Merged Client ID(s), and notes on any differences between the records

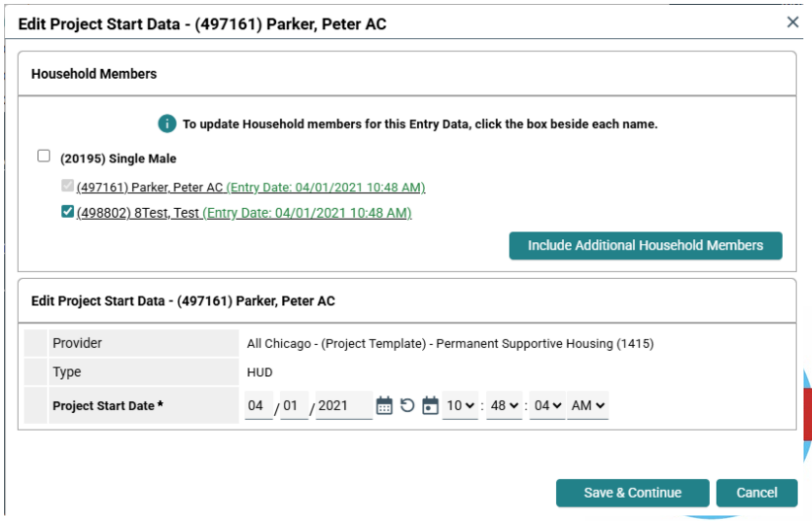
Chicago CONTINUUM of Care

Households and Enrollments

In HMIS, the household is what links people to the same enrollment who were served together during that stay.

Create (or confirm) the household before you create an enrollment. If the client's current composition isn't represented by the available options, create a new household. Do not delete an existing one or remove members, because doing so breaks the linkage in any enrollments that used it and those links cannot be restored. During enrollment, select the correct household so the record ties the right people to that project enrollment.



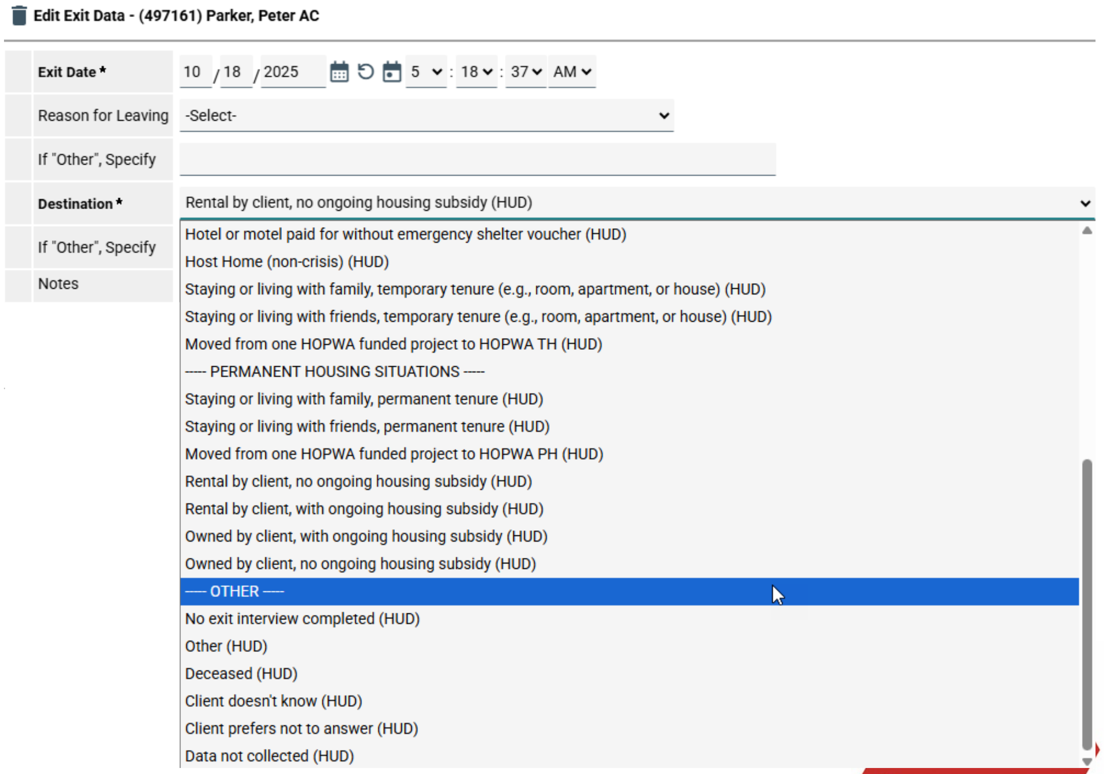


Exits / Destinations

When you close an enrollment, the Destination must capture where the client will be staying after exit, and it's collected only at exit. With access to view other enrollments ensure you are only adjusting the intended enrollment

- Permanent Housing: If the client moved in (you documented a HMID during enrollment), select the permanent housing destination that fits.

- Transfers and coordination: When a client is going directly to another project, coordinate dates with the receiving provider so your Exit Date/Destination and their Entry line up—this avoids artificial overlaps.



Verify Prefill Assessment Data

With Global Visibility, assessment responses will pre-populate from the most recent visible data; treat those as a starting point, not the truth. Verify with the client and save any correction in the correct assessment for that enrollment. Also, confirm you're on the right provider/enrollment before you save; if you opened another agency's assessment for context, back out with "Exit" to avoid accidental edits.

Use the assessment's history panel to review prior rows by date; when you need the exact user and provider context

History - Does the client have a disabling condition?

	Date Effective	User Adding	Provider Adding	Value		
	03/18/2025 10:56:28 AM	Alexander Fuller	All Chicago	No (HUD)		
	01/26/2024 12:00:00 PM	Alexander Fuller	All Chicago	No (HUD)		

Showing 1-2 of 2

Chicago CONTINUUM of Care

Dates Matter

Dates matter because they tell the true story. They show when a client was actually in your project and when a change occurred. When income or benefits change, add an end date to the prior source before adding the new one; if you don't, reports may read both as active and make the client look over an income threshold purely because of a date mistake.

Strong date discipline improves overall data quality and reduces rework and back-and-forth for everyone who relies on the record.

Chicago CONTINUUM of Care

Why Timeliness Matters

Timely entry lets the next provider see what's true right now. Enter data as close as possible to the moment you collect it. Details fade, and small mistakes typically happen the longer you wait. Keeping the record current is the simplest way to make sure the most accurate information guides decisions and to avoid re-asking clients the same questions. And with Global Visibility, a timely update means everyone across agencies is looking at the same up-to-date picture, not last week's version. Ensure that enrollments are created within 2 days

Full Assessments Completed by:

- Emergency Shelters and Interim Housing: 72 hours
- Outreach Programs:
  - 48 hours to document first outreach sub-assessment
  - Upon enrollment of services - 7 days
- Permanent Housing and Permanent Supportive Housing: 7 days
- Rapid Re-Housing: 7 days

Chicago CONTINUUM of Care

Summary

1. **Do not change or delete data entered by other providers!**
   Even if you can edit it, that data may be tied to another agency's reporting or reflect a client interaction you weren't part of. If something looks off, reach out to the agency that entered it.

2. **Assessment fields may now pre-fill with historical values.**
   This helps reduce duplicate data entry, but it's still your responsibility to confirm the information with the client during your assessment.

3. **Always collect data at the point of contact.**
   Even if some fields are pre-populated, each project is still responsible for conducting its own assessment and entering data based on what the client shares.

4. **Data from other agencies may be more accurate or up to date.**
   Use it to inform your work, but verify when needed. If there's a conflict, collaborate with the other provider to determine the best course of action.

5. **Collaboration is key.**
   The shared system works best when providers communicate and coordinate. Don't hesitate to reach out to an agency's ATA if you have questions about a client's record or need to clarify something.

Chicago CONTINUUM of Care

Resources - Webinars

- Data Accuracy and Audit Tools (Tuesday, January 27, 2026, 12:00 pm - 1:00 pm)
- Reporting Impacts (Thursday, January 29, 2026, 12:00 pm - 1:00 pm)

Chicago CONTINUUM of Care

Resources – Helpdesk Links

- HMIS Global Visibility Announcement
    - https://hmis.allchicago.org/hc/en-us/articles/34297099086484-HMIS-Global-Visibility-Announcement
- Using a Shared Data System
    - https://hmis.allchicago.org/hc/en-us/articles/34306612015380-Using-a-Shared-Data-System-Important-Guidelines
- Guidelines for Identifying, Preventing, and Fixing Undesirable Data
    - https://hmis.allchicago.org/hc/en-us/articles/44136294166164

Chicago CONTINUUM of Care

Q & A

Chicago CONTINUUM of Care

Thank you

Chicago CONTINUUM of Care