

# Agency Technical Administrator Meeting

November 13, 2019

# ATA Meeting

- 10 am - Introductions and Welcome
- 10:15 am - Training Updates
  - PSH Course Available
  - Proctored Sessions
- 10:35 am - Coordinated Entry
  - New Transfer Process
  - Matching Process
  - Assessment Refinements
- 11 am - Point in Time Count
  - Upcoming Training Course and Next Steps
- 11:10 am - Compass Project
  - Inclusion in the Intent To Renew
- 11:20 am - Breakout

# Introductions

# Training

# Training: PSH, PH, RRH Course Available

- The newest course available in the Online Learning Portal
- Your users will purchase the permanent housing course and will then have access to two versions of the workflow - one specific to singles and one specific to multi-person households

# Training: Proctored Sessions

- We now have courses dedicated to the two largest workflow types, the evaluation process will change
- Starting **December 1st**, any users that have gone through the ES or the PH courses will receive their license after creating one sample household in their assigned project

# Training: Proctored Sessions

- At the end of the ES/TH/SH and PH/PSH/RRH courses, there will be a registration for proctored evaluation sessions
- These evaluation sessions are not a new training - we ask users to create a client record that meets specific standards
- Each project type will have a different scenario for the user to input into HMIS
- The present HMIS team member will review this client record and give the user access to their live site account, or provide guidance to the user and ask them to try again

# Training: Proctored Sessions

- Below are our criteria:
  - Create a Client Record from Scratch
    - With full documentation of data quality (name, ssn, etc.)
  - Release of Information Documented
  - Client Record Locked when Necessary
    - Each scenario provided will need to be locked
  - Fully Documented Entry Assessment
  - Housing Move-in Date completed through an Update
    - Applicable to PH/PSH/RRH providers
  - Correct Interim assessment and sub-assessment updates
  - Client Exited



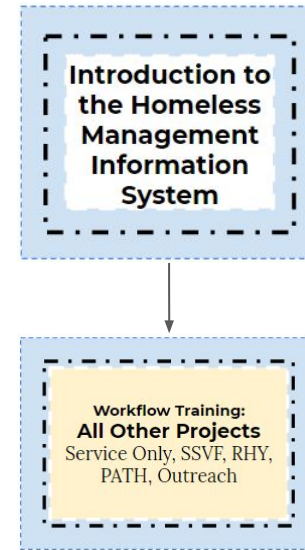
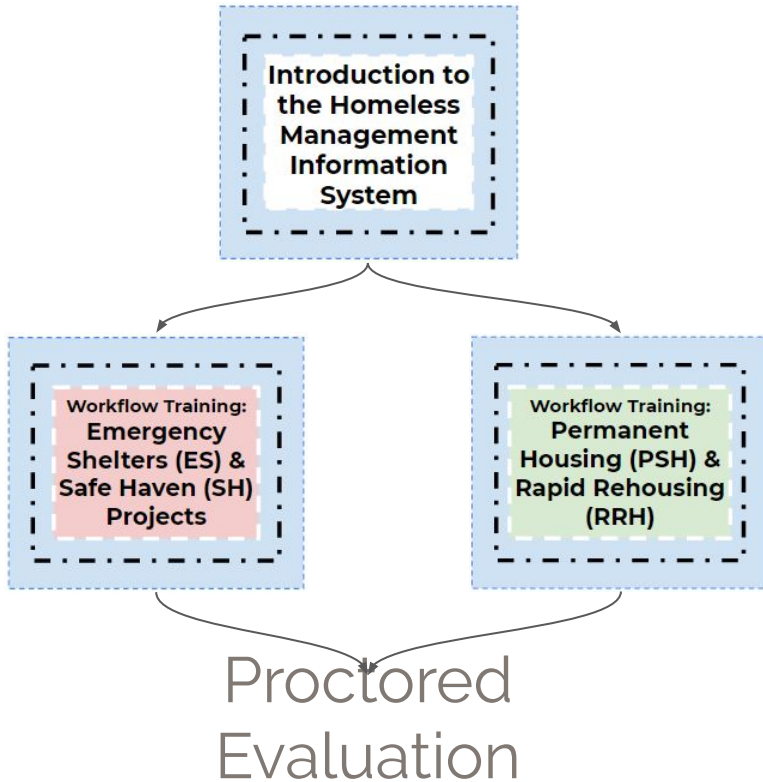
# Training: Proctored Sessions

- What does this mean?
  - A user can come into a proctored session and leave in as little as 5 minutes if they are sufficiently prepared
  - A user may also not receive a live site account if they are not capable of creating a satisfactory client example
    - We will notify the ATA in those instances
  - Users should be talked with beforehand to see what project they should enroll their sample client into

# Training Overview

Emergency Shelter	Permanent Housing	SSVF, RHY, PATH and Others
Introduction to HMIS (3 hours)	Introduction to HMIS (3 hours)	Introduction to HMIS (3 hours)
Emergency Shelter (ES) + Safe Haven (SH) Workflow Training (2-3 hours)	Permanent Supportive Housing (PSH) + PH + Rapid Rehousing (RRH) Workflow Training (2-3 hours)	Project Specific Workflow Training (This course is simply a registration form to a specific project type training)
Proctored Session	Proctored Session	In-Person Specialized Training

# Training Overview



In-Person Training

*In Lieu of an online training course*

# Coordinated Entry

1. New Transfer Policy
  2. New Matching Process
  3. Assessment Refinement
- (Please ask questions at end of section - thanks)

# New Transfer Policy & How it looks in HMIS

# Transfer Policy Update

- Fairer process
  - Case conferencing during SIT\* meetings instead of one person approving
  - Prioritization based on urgency of request as determined by the transfer policy workgroup
  - Approval required for External but not Internal transfers

\*System Integration Team meetings for youth, veterans, singles

## Transfer Update in HMIS

- Almost exactly the same process for provider
  - Create interim update called **CES Transfer Request Form**
- Now two different forms
  - External: transfers between agencies or project types within an agency
  - Internal: transfers within same project type and agency

Select an Assessment

<input checked="" type="checkbox"/> DFSS and IDHS Supplemental Assessment	<input checked="" type="checkbox"/> HUD CoC & ESG Entry All Other Projects (2020 Chicago)	<input checked="" type="checkbox"/> HUD CoC & ESG Exit (2020 Chicago)	<input checked="" type="checkbox"/> HUD CoC & ESG Update (2020 Chicago)
<input checked="" type="checkbox"/> Annual Assessment (2020 Chicago)	<input checked="" type="checkbox"/> Chicago Continuum of Care (CoC) - Standardized Housing Assessment - New Contact Information	<input checked="" type="checkbox"/> Coordinated Entry Transfer Request Form (External)	<input checked="" type="checkbox"/> Coordinated Entry Transfer Request Form (Internal)



# Transfer Update in HMIS: External

- External Transfer Form includes:
  - Alternative Housing Options table
  - Transfer Category Reason
    - This is how transfers will be prioritized (eg., a domestic violence situation will be high priority and require review within two days)
  - Yes/No have documents been uploaded for a new provider (eg., homeless verification packet)
- An email with all new external transfer requests are sent to matching team and others DAILY

# Transfer Update in HMIS: Internal

- Internal Transfer Form includes:
  - Very basic information, just a few questions
- Meant to document a transfer - does not require approval for transfer to be carried out
- An email with all new internal transfer requests are sent to matching team and others every TWO WEEKS, just so they can check “approved”
- [Transfer Policy and webinar on the HelpDesk](#)

# Questions on Transfers?

# New Matching Protocol

## Permanent Housing Only for now

# New Matching Protocol

- Providers have requested a move from using Google forms for match and re-match requests.
- Over a year in process: Ideal implementation Dec '19
- “Piloting” with PSH providers first. Then once we are solid move on to RRH, and any other project type that accepts referrals through CES
- HMIS team determined best way to carry out: utilizing ShelterPoint












# New Matching Protocol: Nutshell

- Unit lists on HMIS within ShelterPoint reflect unit capacity for: individuals or families, min/max people, whether unit is wheelchair accessible.
- If units are full, nothing happens
- Remove client from a unit, that unit shows up on a daily report sent to match team
- After that, the process is basically the same
  - Matching team still refers to One List to match clients
  - Matching team sends email to provider, skilled assessor etc

# New Matching Protocol: Example

## Shelter Inventory Information

### Unit List - CES - 0288 - 01

	Date In	Floor	Room	Bed	Hold	Client
	07/08/2012	Floor	Room	001 Family - Min2, Max2		(559)
	03/18/2013	Floor	Room	001 Individual		(281)
	04/28/2014	Floor	Room	002 Family - Min2, Max4, Accessible		(329)
	04/07/2009	Floor	Room	002 Individual		(989)
	08/09/2018	Floor	Room	003 Family - Min2, Max4		(437)
	10/11/2012	Floor	Room	003 Individual		(243)
	04/07/2009	Floor	Room	004 Family - Min2, Max4		(136)
	02/28/2009	Floor	Room	004 Individual		(136)
	02/13/2015	Floor	Room	005 Individual		(171)
	02/26/2015	Floor	Room	006 Individual		(352)
				Overflow (New)		EMP <sup>ry</sup>

# New Matching Protocol: Potential Pitfalls

- Providers need to be up to date on adding/removing clients to/from the unit list
- If you “attach” another person to “unit” entry, and don’t assign a unit, they will be put in “overflow”. Only add HoH.
- Providers need to update needs statuses in a timely way - [review needs status here](#) - we need to know when a rematch is requested



# New Matching Protocol: Review on Helpdesk

- [Webinar and FAQ](#)
- A lot of information on this webinar: if you need to know the details of this process, please take the time to watch and read the FAQ

# Questions on Matching?

# New Standardized Housing Assessment

(aka CES Assessment or Coordinated  
Entry Assessment)

# New Matching Protocol: Potential Pitfalls

- The entire focus of this revision is on the Standardized Housing Assessment, and this does not include the VI.

# New Matching Protocol: Potential Pitfalls

- Several focus groups led to current draft, which is shorter than the current assessment with a goal of only asking questions used for matching people to housing and services.
- The purpose is to reduce the trauma that can be caused by asking sensitive questions and to ensure assessors can reach a greater number of people each week.
- **Feedback wanted and appreciated!**

# Questions on Refinement?

# Point in Time Count

# Compass Project

(Early Stages)



# Compass Project

As the sophistication of data entry and maintenance grows, there needs to be a shift in the way we think through data and specifically data workflows.

The aim of the compass project is to provide baseline materials for agencies to make their own data informed decisions and provide them with the organizational tools to be able to address changes.

# Compass Project: Goals

- Assist agencies to create internal quality assurance that covers:
  - a. Creation of an internal data monitoring process
  - b. Onboarding of new employees
  - c. Internal communication plan
  - d. Internal documentation plan

# Compass Project: What will be involved?

- Universal intake documentation
- On-site Monitoring Criteria
  - a. Create a structure for criteria
  - b. Reduce the scope of file review
  - c. Create a timeframe cut off for client consents

# Compass Project: What will be involved?

- Recommended Practices
  - This would include a series of articles/videos which will serve as recommended guidelines, much like the universal intake documentation. **These are not prescriptive, but rather serve as a starting point for agencies** to work off of in ways that make sense for their own situations.
  - Create article series on:
    - How to keep records
    - How to read data/Know your numbers
    - Employee Onboarding Checklist
    - Creating internal data flows at your agency

# Compass Project: What will be involved?

- **Streamlining Workshop**
  - These streamlining workshops will be open to ATAs and any project managers wanting to participate
  - There will be 2-3 of these workshops conducted during early Q2
- **Peer Sharing**
  - With each of the providers creating their own workflows and documentation, we want to encourage resource sharing amongst providers and would place emphasis on ATAs/program managers sharing information with one another through Wild Apricot

# BREAKOUT



What tools would you want from the Compass workshops and process?

- Split up by agency size
  - Large, Medium and Small
- What kinds of recommended practices do you need?
- As ATA now, do you feel you have sway to inform data entry decision at your agency?
  - What would help you get there?
- Is there communication between you and the CES point person?

# HMIS Events

- Data Quality Workgroup - Meeting November 19th @ 10 am
  - Concentration on DFSS Reporting, guest is Kimberly Howard from DFSS
    - Email Sal ([smunoz@allchicago.org](mailto:smunoz@allchicago.org)) with any questions you may have
- HMIS Committee - Meeting November 20th @ 10 am