

HMIS DATA ENTRY UPDATES | MAY 2018

These data entry updates summarize new policy and data entry guidance that was among the information provided at the April 2018 HMIS User Group Meeting.

Housing Move-In Date

The Housing Move-In Date is a new field added to the HMIS based on the Data Standards released by HUD in the fall of 2017. This field was formerly intended only for RRH providers and is now a required field for all housing providers to be entered to show when a client has moved into a housing opportunity.

Please note that the Housing Move-In date is not equivalent to the Project Start Date - the Project Start Date is the date you begin to work with the client, the Housing Move-In date is the date the client moves into housing.

Best Practices

Here are some best practices to keep in mind when working with the Housing Move-in date:

- If you are working with a client who has moved into housing, then you will need to record the Housing Move-in date. The field should only be entered when a client has moved into a housing situation and not before.
- If you are working with a client and need to update their Housing Move-In Date, please do so in the entry/exit for your housing provider. You should enter the Housing Move-in date as an interim update.
- If you are working with a client and see that they have a Move-in date entered into that field, and you do not believe the client should have a Move-in date recorded because to your knowledge, the client has not moved into a housing opportunity, do not delete the existing entry.
- Instead, please contact support@rtfhdsd.org and notify us that there is a potentially incorrect Move-in Date entered for a client who is not housed. If this is a user error, the RTFH will remove the date
- If you are working with a client and see that the client has a Move-in date entered into that field, but you are working with the client on intake and see that the client already has a Move-in Date entered, at that point you should remove the date that was populated, and then when the client has moved into a unit, enter the client's Move-in Date as an interim update.

Income

There are several items related to entering, updating and reporting on income that were discussed and clarified during the April 2018 User Group meeting.

Income Rounding

One aspect of entering/updating information in ServicePoint that can be particularly tricky is how to round income when entering income values in various fields. This is especially true because different fields have different character limits, and those character limits do not always correspond to an appropriate number of digits to use to refer to various income amounts. To help resolve this the Tech Team has the following policy statements which it advises users reference in entering income values:

1. For values under \$1000 put as much information as will fit. For instance this means users should put the amount with a single decimal place (since that's what fits) for values between \$100-\$999. Users should put two decimal places for values \$0-\$99.
 - a. E.g., \$150.56 becomes \$150.5 when a user inputs that amount.
 - b. \$99.99 stays \$99.99 since it all fits in the sub-assessment. (5 characters)
2. For values over \$1000, we advise rounding in the same method in which the APR rounds (to stay consistent). Anything right of the decimal starting with 5 or small should be rounded down. Anything .6 or larger should round up.
 - a. E.g., \$1200.55 becomes \$1200
 - b. \$1200.61 becomes \$1201

Please note: *These statements above should be used in situations in which errors are pulling on CoC-APR reports. These statements are not meant to upend anyone's understanding of typical rounding - the CoC-APR rounds this way which is slightly different from traditional rounding so these statements are here to provide help in troubleshooting possible situations that could arise.*

End-Dating Old Income Values in Income and Sources Sub-Assessment

Another income-related item that can contribute to confusion and data quality errors is updating income for a client. Whenever you have an update to income, you should update the values entered in the PSDE Assessment, within the Income and Sources sub-assessment and the Total Monthly Income field below that.

When updating the income listed in the Income and Sources sub-assessment if you are adding a new value for an Income Source that there is an existing value for (whether you entered that value or another user/provider did) **it is important that you add the new value and end date the old value. Be sure to end date the old value for the date before the Start Date of the new value.** If you end date the old value for the same date as the Start Date for the new value, system reports will

inaccurately report the client's total income on that date of overlap (the system will represent this data entry as the client making both incomes on this date, rather than only the new income amount).

The screenshot below displays a correctly entered update of a client's Earned Income in the Income and Sources sub-assessment from \$50 to \$100:

Show All Income and Sources Records

Income and Sources						
	Provider	Date Effective	Source of Income	Monthly Amount ▲	Start Date	End Date
 	UDE Default Training Provider (6424)	03/23/2018 12:00:00 AM	Earned Income (HUD)	US\$50.00	02/12/2018	04/15/2018
 	UDE Default Training Provider (6424)	04/16/2018 12:00:00 AM	Earned Income (HUD)	US\$100.00	04/16/2018	
 	UDE Default Training Provider (6424)	03/23/2018 12:00:00 AM	Other (HUD)		03/23/2018	

Income on the APR

Many users have contacted us in the past with requests to help them troubleshoot an APR which tells them they have may have income-related data issues on entry, interim, or exit.

A majority of these issues can be solved by fixing two major issues:

1. Income dates overlap on the same calendar date (which causes the report to retrieve invalid information)
 - a. This is covered above in the section titled "End-dating old income values in Income and Sources sub-assessment"
2. Income values are set in a conflicting manner.
 - a. Conflicts can arise from one main area in the income sub-assessment. When entering income into the sub-assessment you are prompted to selected whether or not the client is receiving that income type (that question is outlined in red in the screenshot below):

Edit Recordset - (2062) Doe, Jane

Income and Sources

Source of Income *	Earned Income (HUD) ▼ G
If Other, Please Specify	<div style="border: 1px solid gray; height: 150px; width: 100%;"></div> G
Monthly Amount *	50 G
Start Date	02 / 12 / 2018    G
End Date	04 / 15 / 2018    G
Receiving Income Source?	Yes ▼ G

Print Recordset Save Cancel

- i. Be sure that if a value more than 0 is present in the “monthly amount” that the “Receiving Income Source” is set to “yes”.
- ii. Conversely, if the specific income you’re looking at has a value of 0 (or blank) then please be sure to set “Receiving Income Source” to “no”.
- iii. Lastly, conflicts will arise if a “yes” receiving income source record and a “no” receiving income source record overlap on the same calendar dates.

EDA Reminder and Data Visibility Issues

The Tech Team reminded all users at the April 2018 User Group Meeting to be sure to select the correct EDA provider before entering any data. This will ensure that all data is visible to the users that need to see it and that data pulls into the correct provider reports.

A number of users and providers have made us aware of problems viewing VI-SPDAT scores for clients. From what we have seen, this mainly applies to scores entered prior to October 2017. After investigating the issue, we determined that the visibility settings are not behaving as they should and sent the problem to the ServicePoint software vendor. They are still investigating the issue. We will update all users as soon as we have more information on the problem.

If you are unable to see VI-SPDAT scores for a client that you think you should be able to see scores for, please send a ticket to support@rtfhdsd.org. While we have not yet determined a system-wide solution to this issue, we can open up visibility of VI-SPDAT scores for individual clients to resolve this issue for users.

Visibility of Data Entered into CES Assessments

Data entered in CES regional provider entries has recently been opened up more broadly so that all users in San Diego's CoC can now view data entered within the three CES assessments (the Common Assessment Tool, Match Initiation Form and Housing Placement Form) without having to EDA as a CES regional provider.

This DOES NOT MEAN that users can enter data into the CES assessments without EDA'ing as a CES regional provider. It is imperative that **ALL USERS EDA AS A CES REGIONAL PROVIDER (SO EITHER NORTH COUNTY, SOUTH, EAST, CENTRAL OR VETERANS) BEFORE ENTERING NEW CES DATA.** However the ability to view CES data has been expanded to better align with the terms of the MPA and to reduce the steps needed when a user needs to view data (such as viewing a client's VI-SPDAT score) without entering/editing data.