

CoC HEAP Instances of Service Guide

This document's purpose is to explain, in detail, the process for recording instances of services within HMIS under the CoC HEAP subcontract.

There are a few objectives of this document, but it should be noted that there are two methods of tracking instances of service depending on which program type you are working within.

Outreach follows the standard outreach workflow – the current living situation assessment and standard 'canned' (built-in) reports can capture each instance of service if the standard outreach workflow is followed appropriately.

All other program types (non-outreach) will need to add program-specific services at each instance of service to record when a service was given.

Please see below for a step by step guide for each type of data entry.

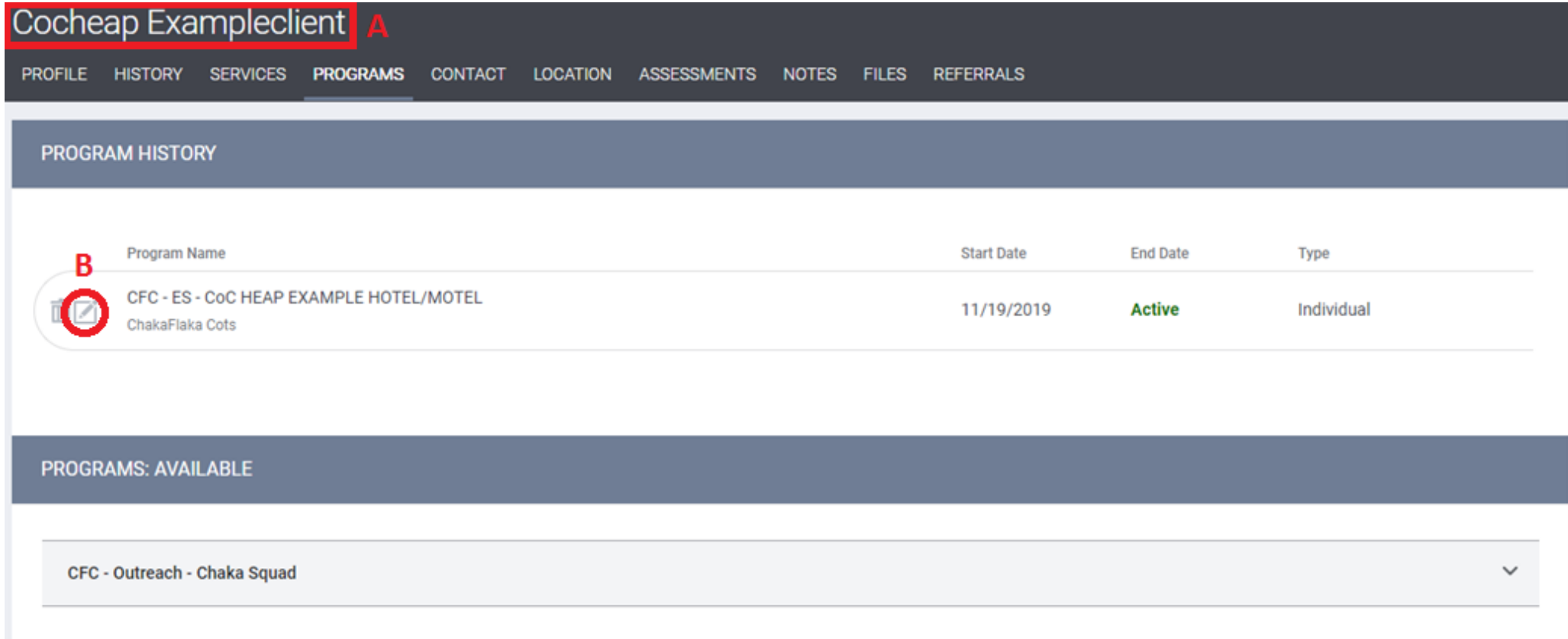
1. How to add CoC HEAP "Instances of Service" HMIS Service Transactions

- a. For providers who did not initially elect to set up service transactions upon initial program creation
- b. For providers who already had specific services configured for CoC HEAP programs upon program creation

2. How to add Current Living Situation Assessments to CoC HEAP Outreach Program Enrollments

3. How to report on number of Instances of Service

1. How to add CoC HEAP “Instances of Service” HMIS Service Transactions



The screenshot displays the HMIS interface for a client named 'Cocheap Exempleclient'. The client's name is highlighted with a red box and labeled 'A'. The 'PROGRAMS' tab is selected in the navigation menu. Below the navigation, there is a 'PROGRAM HISTORY' section containing a table with the following data:

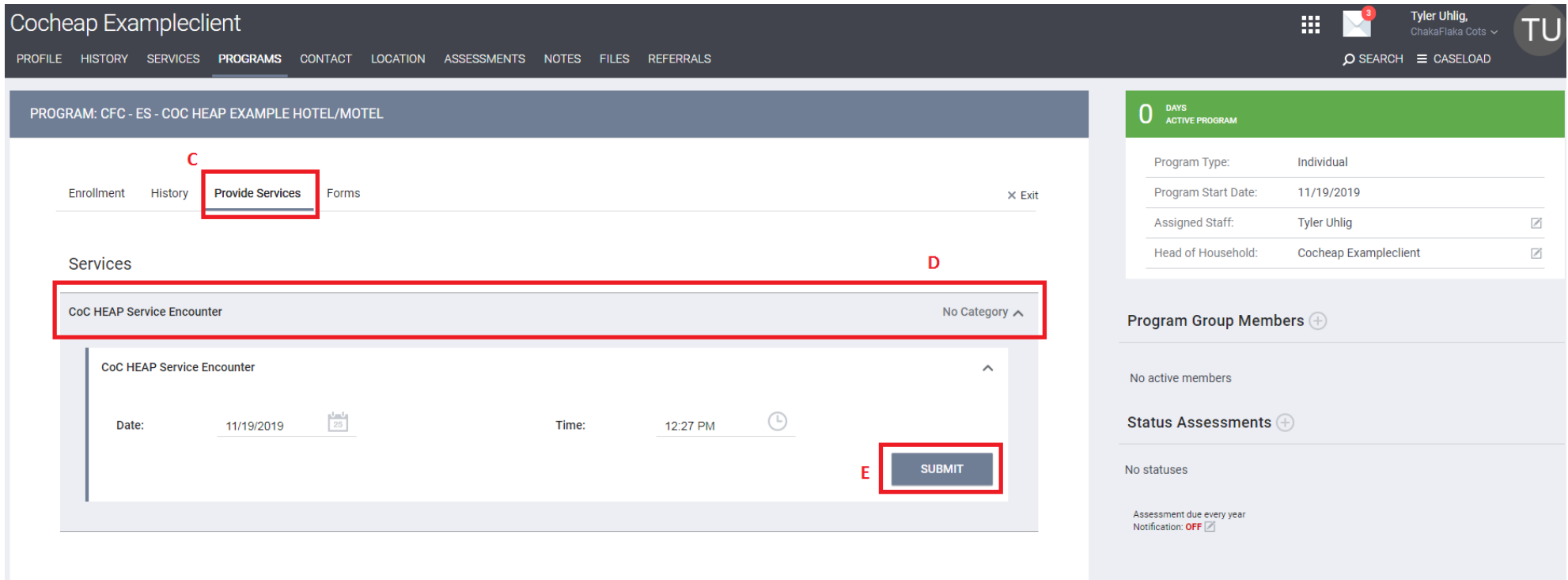
Program Name	Start Date	End Date	Type
CFC - ES - CoC HEAP EXAMPLE HOTEL/MOTEL ChakaFlaka Cots	11/19/2019	Active	Individual

Step 'B' is indicated by a red circle around an edit pencil icon next to the program name. Below the history table, there is a 'PROGRAMS: AVAILABLE' section with a dropdown menu showing 'CFC - Outreach - Chaka Squad'.

Regardless of which program you are working in (Outreach or any other program type) and regardless of whether or not you already had specific services configured for your program, everyone will start by navigating to their client’s enrollment into the CoC HEAP program.

- A. In this screenshot, my client is “CoCHEAP ExampleClient”. Step A in red in the screenshot above is to navigate to your client’s profile and get to their programs tab. In the red box is my client’s name – this shows I’m viewing this client’s profile.
- B. Step B is to find your CoC HEAP Program enrollment (they all have “CoC HEAP” in the title) and click the edit pencil as circled above.

a. For providers who did not initially elect to set up service transactions upon initial program creation



The screenshot displays the HMIS interface for a client named 'Cocheap Exampleclient'. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'CONTACT', 'LOCATION', 'ASSESSMENTS', 'NOTES', 'FILES', and 'REFERRALS'. The 'PROGRAMS' tab is active, showing 'PROGRAM: CFC - ES - COC HEAP EXAMPLE HOTEL/MOTEL'. Below this, there are tabs for 'Enrollment', 'History', 'Provide Services', and 'Forms'. The 'Provide Services' tab is highlighted with a red box labeled 'C'. Underneath, the 'Services' section shows a list of services, with 'CoC HEAP Service Encounter' highlighted by a red box labeled 'D'. This service entry is expanded to show details: 'Date: 11/19/2019' and 'Time: 12:27 PM'. A 'SUBMIT' button is located at the bottom right of the service details, highlighted with a red box labeled 'E'. On the right side of the interface, there is a summary card for the program, showing '0 DAYS ACTIVE PROGRAM', 'Program Type: Individual', 'Program Start Date: 11/19/2019', 'Assigned Staff: Tyler Uhlig', and 'Head of Household: Cocheap Exampleclient'. Below this, there are sections for 'Program Group Members' (No active members) and 'Status Assessments' (No statuses).

If your program did not initially have specific service transactions set up to track individual instances of specified services, we configured a generalized program service called “CoC HEAP Service Encounter” so that services could be tracked within HMIS.

- C. Once you’ve clicked into your client’s CoC HEAP enrollment (step B above) you can navigate to the “provide services” tab within that enrollment (item C in red).
- D. The “CoC HEAP Service Encounter” service will be on this “provide services” tab. Item D in red shows the service which must be expanded (by clicking on it) to reveal the service’s details which are comprised of service dates and notes. Please note – for these services a same-day start and end date is appropriate and will auto-populate. You want a distinct and independent service for each service instance.
- E. Item E in red above shows where you may submit and save the service once you confirm all data is accurate. Clicking submit here records one single instance of service to the client. Each independent service encounter will count as one service instance in reporting.

b. For providers who already had specific services configured for CoC HEAP programs upon program creation

The process of adding services is nearly identical for programs who **did** elect to configure specific services (such as referrals, rental assistance, basic needs services, etc.). Even if you had services already configured for your program, we also set up this generic “CoC HEAP Service Encounter” service so that you may track service provision for any instance of service which is otherwise not specified by your currently-configured services.

Adding **any** program service (found within the CoC HEAP enrollment) can be counted as an instance of service as we will explain in part 3 in regards to reporting.

Continued on next page.

Enrollment History **Provide Services** Assessments X Exit

C

Services	
Basic Needs	Other ▼
CoC HEAP Service Encounter	No Category ▼
General Financial Assistance	Financial ▼
Housing Placement Assistance	Housing Search and Placement ▼
Identification Documentation	Case Management ▼
Transportation Assistance	Transportation ▼

D

C. Once you've navigated to your client's CoC HEAP enrollment (from step A and B above), click on the 'provide services' tab (the red C in the screenshot on this page).

D. The services you see in the red box above the red letter "D" are what are called program services – these are tied to the enrollment you are currently viewing. Adding any of these will count as an instance of service. Every program will vary based on what was specified during initial program setup. For services that are otherwise not captured by the choice you have, you can use the generic "CoC HEAP Service Encounter" service to record those non-specific service instances.

Continued on next page.

Enrollment History **Provide Services** Assessments

× Exit

Services

Basic Needs

E

Other ▾

CoC HEAP Service Encounter

No Category ▲

CoC HEAP Service Encounter ▲

Date: 11/19/2019



Time: 12:25 PM



F

SUBMIT

General Financial Assistance

Financial ▾

Housing Placement Assistance

Housing Search and Placement ▾

Identification Documentation

Case Management ▾

Transportation Assistance

Transportation ▾

- E. To add one of these service transactions, simply click on one of them (an example is in the red box labeled “E” – you’d click this to add a “CoC HEAP Service Encounter” service).
- F. After clicking the service, once you confirm everything is accurate regarding date and time of the service instance you can click submit to record the service. Each independent service that you record in this fashion will be counted as one service instance in reporting. These services can be of any type as long as they are recorded with this method.

2. How to add Current Living Situation Assessments to CoC HEAP Outreach Program Enrollments

Outreach programs have a unique workflow which supports collecting data at each and every client interaction. With the 2020 HMIS Data Standards taking effect on October 1st, 2019 the Current Living Situation Assessment became a required part of data entry for Outreach programs.

Prior to this, outreach workers collected services similar to what has been listed above in this document.

In preparation for the 2020 HMIS Data Standards the RTFH produced a guide document giving detailed instructions of how to collect and enter the Current Living Situation Assessment into HMIS. The Current Living Situation Assessment must be completed within an active program enrollment and acts very similarly to a service transaction, but it requires additional data entry when compared to a service.

Please view the RTFH's Current Living Situation Assessment guide document here:

<https://www.rtfhsd.org/wp-content/uploads/2019/10/Current-Living-Situation-Data-Entry-Guide-9252019.pdf>

Outreach programs may or may not have additional services tracked.

Please note that for outreach programs only current living situations will be counted for CoC HEAP as an instance of service.

3. How to report on number of Instances of Service

In general, there will be two methods of reporting instances of services and it will depend on which program type you operate under the HEAP contract(s). Outreach programs may use the APR to count number of contacts. All other program types will need to contact RTFH for guidance on custom reporting using Looker (Clarity's Data Analysis Tool).

Continued on next page.

3. How to report on number of Instances of Service

Due to reporting logic required and service instances per-program being an ad-hoc need all program types will need to either contact the RTFH for an ad-hoc report or utilize the data analysis tool (Looker) to build an ad-hoc report to capture all service transactions that represent instances of service.

For assistance with both tasks, the RTFH can be reached at support@rtfhsd.org

Please include in your email to support@rtfhsd.org enough of a description so that we may understand through the email that you are looking for CoC HEAP-specific service instances, including the program or programs for which you need to know service instances as well as the reporting date range you want to see.