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**Regional Task Force
on the Homeless**

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HMIS Outreach Guide

Background

Outreach workers have a different workflow for providing clients services than many other types of programs that track their work in HMIS. Outreach workers may also be less able to collect complete data on their clients initially than other programs; outreach workers may need to develop a relationship with a client over the course of numerous interactions before a client is willing/feels comfortable providing detailed personal information.

Data collection expectations for outreach programs in HMIS reflect this different workflow. The following guidance defines key data elements for street outreach programs and advises how an outreach worker should enter data for a client in HMIS throughout the Outreach workflow.

Key Terms

Program Enrollment/Project Start Date: The date that a client is first assisted by your program. For outreach programs, this means the *date of first contact with the client*.

Current Living Situation (Formerly "Contact"): Street outreach projects are expected to record every contact made with each client in the HMIS through the "Current Living Situation" program assessment. *A contact is defined as an interaction between a worker and a client designed to engage the client.* Contacts include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A Current Living Situation must be recorded anytime a client is met (including on the same date the client is enrolled into the program (i.e., the Project Start Date) as well as the Date of Engagement (which will be defined below).

Engagement/Date of Engagement: *Engagement date is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan*. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. The date may be on or after the date that the client is enrolled in the program (project start date) and must be prior to the date the client exits from the program. If the client exits without becoming engaged, the engagement date should be left blank.

Project Exit Date: Exit from a program in HMIS represents the end of a client's participation with a program. The exit date should be entered on *the date the client is no longer considered to be participating in your street outreach program*. This can be harder to determine for street outreach programs than other program types because of the inconsistent/irregular nature of your contacts with a client. However, *there are a number of reasons you may use to determine that a client has exited your program*, including:

- The client has entered another project type (e.g., Transitional Housing, Permanent Supportive Housing) or otherwise found housing).

- The client is engaged with another outreach worker or program;

- The client is deceased;

- For outreach programs the San Diego CoC Outreach Standards states to exit a client if an outreach worker has been unable to locate the client and record a Current Living Situation (contact) within a 90 day period.

Outline of Outreach Workflow in HMIS

Data entry steps in HMIS take place at a few key places in the outreach workflow:

I.   **First contact with client through outreach:**
    A. Search for client in HMIS
    B. If client is not in HMIS, create client
    C. Enroll client into outreach program
    D. Record first contact with the client by adding a "Current Living Situation" program assessment

II.   **Further contacts with client:**
    A. Every time you interact with the client after the first interaction, add a "Current Living Situation" program assessment
    B. If - during a contact - you obtain updated answers to any of the questions asked in the program enrollment (whether it's information that has changed or information the client did not previously provide, but is providing at this interaction), note this update by adding a Status Assessment (in addition to the "Current Living Situation" program assessment).
    C. When the client is engaged, note the Date of Engagement in the client's enrollment.

III.   **End of outreach relationship with client**
    A. Exit client from your program when you determine that they are no longer participating for any of the reasons listed in the definition of Project Exit Date above.
    B. Further contacts with client after exit should be recorded with a new enrollment.

Step-by-Step Instructions for Data Entry on Outreach Workflow in Clarity

See below for detailed instructions on completing data entry for each workflow step outlined above in Clarity.

I. First Interaction with Client Through Outreach

A. Search for client in HMIS

Search for the client in Clarity using data collected from client. If you do not have enough information to be able to search for a client by any of the basic identifying details (name, Social Security Number, Date of Birth), you likely will not be able to find the client even if they do exist in HMIS and will need to create a new client record. Keep in mind that even after moving forward with creating a new record, as you are able to collect more information from your client you should try searching for them in Clarity again and - if they do exist - contact support@rtfhsd.org regarding how to merge the multiple client records moving forward.

B. If client is not in HMIS, create client

If you cannot find the client in Clarity, create a new client.

You may have to record limited information about your client initially and improve on the accuracy and completeness of client data over time and as your relationship with the client develops. For the initial creation of the client and their enrollment, you may need to select "Client refused" or "Data Not Collected" for many data elements.

It is important that you edit initial data over time as you are able to obtain accurate/complete information from the client. It is also important that - if you are only able to enter basic information initially - you are able to later retrieve this client record upon subsequent visits (or that if other outreach workers contact this client, they are able to identify their record) in order to update information. This may require coordination with your team members. The Location tab of the client record may also help you record information about where the client has stayed or can be reached that can help you identify them on further visits.

Enter information into the client profile as follows:
- **Social Security Number and Quality of SSN:**
  - If you are unable to obtain the client's SSN, enter all 0's and select "Data Not Collected" for Quality of SSN.
  - If you are able to obtain a partial SSN, enter what you can obtain and select "Approximate or Partial SSN Reported".

- **First Name, Last Name and Quality of Name: Attempt to obtain the client's full name.**
  - If you are only able to obtain the client's first name, fill out the other fields as follows::
    - Last Name: Enter a "made-up" last name that will help you identify the client when searching for them again (e.g., "Redhat Tenthstreetbridge").
    - Quality of Name: Select "Partial, street name or code name reported".
  - If you are not able to obtain the client's first or last name, fill out the fields as follows:
    - First Name and Last Name: Enter a "made-up" last name that will help you identify the client when searching for them again (e.g., "Redhat Tenthstreetbridge").

- Quality of Name: Select "Partial, street name or code name reported".
  - If you cannot obtain a client's name because they report not knowing their name or are unable to provide it (rather than - for example - it being difficult to obtain their name because you are still building your relationship with the client in order to be able to gather more complete information), select "Client doesn't know" for the Quality of Name field.
  - If you cannot obtain a client's name at contacts with them because they refuse to tell you their name (rather than - for example - it being difficult to obtain their name because you are still building your relationship with the client in order to be able to gather more complete information), select "Client refused" for the Quality of Name field.

- **Date of Birth:**
  - If you do not ask the client for their date of birth, fill out the DOB fields as follows::
    - DOB Data Quality: Select "Data Not Collected".
    - Date of Birth: This field will disappear when you select "Data Not Collected" for DOB Data Quality, and so will be saved as blank by default. When you are later able to obtain a partial or complete Date of Birth from the client, in order to add the new information you will first need to edit the selection for the DOB Data Quality field in order for the Date of Birth field to show up.
  - If the client cannot remember their full or exact date of birth, you can estimate and enter data into the DOB fields as follows:
    - Date of Birth: If the client cannot remember their birth year, it may be estimated by asking the person's age and calculating the approximate year of birth. If a client cannot remember the month or day of birth, record an approximate date of "01" for month and "01" for day.
    - DOB Data Quality: Select "Approximate or partial DOB reported" for DOB Data Quality.
      - If the client cannot estimate their age within one year of their actual age, select "Client doesn't know" for DOB Data Quality.
      - If a partial or approximate date of birth is entered in order to create a record in the system because the client refused to provide their date of birth or their age in order for staff to estimate a DOB, then select "Client refused" for DOB Data Quality.

- **Gender, Race, Ethnicity, Veteran Status:** These questions should all be based on client self-report and never based on staff observation.
  - Select "Data Not Collected" if you do not collect the information (for example, if you are not yet able to obtain the information because you are still building a relationship with a client in order to gather more complete information).
  - If the client does not know which of the options they identify as, select "Client Doesn't Know".
  - If the client refuses to answer a question, select "Client Refused".

- **ROI:** You will not be able to finish creating a new client record until you complete the Release of Information section on the top right of the "Create a new client" screen.

  While you may not be able to review HMIS-CIE Multiparty Authorization form during initial interactions with a new client, it is important you do review it and record their response as soon into the relationship as you are able to go over it comfortably. No client should be engaged (i.e., have their Date of Engagement filled out) without having reviewed the MPA and signing to either authorize or decline sharing of their data in HMIS.

  - If you have not yet been able to review the MPA with a new client, you will still need to fill out the ROI information in order to proceed with creating a new client record in Clarity. Because all client records are shared by default, in order to protect this client's information the record will need to be "locked down" until you are able to obtain client authorization to share data. In order to complete the ROI section and initiate the locking of the client's record, complete the following:
    - Release of Information Permission: Select "No".
    - Click on "Add Record" at the bottom of the client record to save your new client record.
    - Once your new client record is saved, privatize the record by completing the following steps:
      - From the client profile, click on the privacy shield icon on the far right side of the screen.
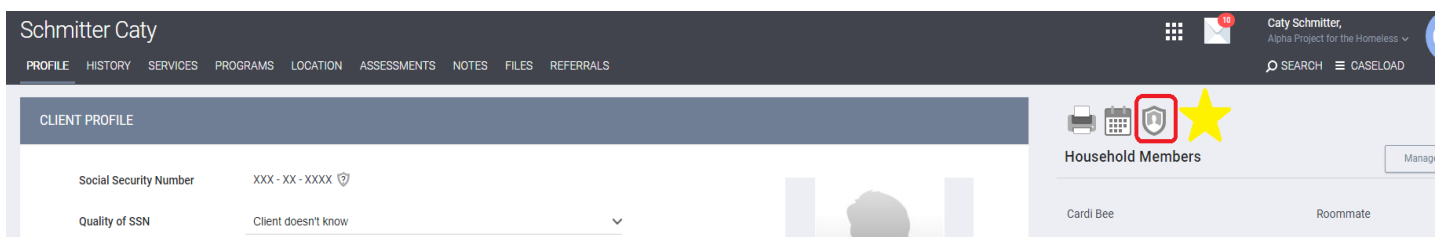
      - In the Client Privacy area, the word "Public" should currently be underlined. Click on the word "Private". Then click on "Save Changes".
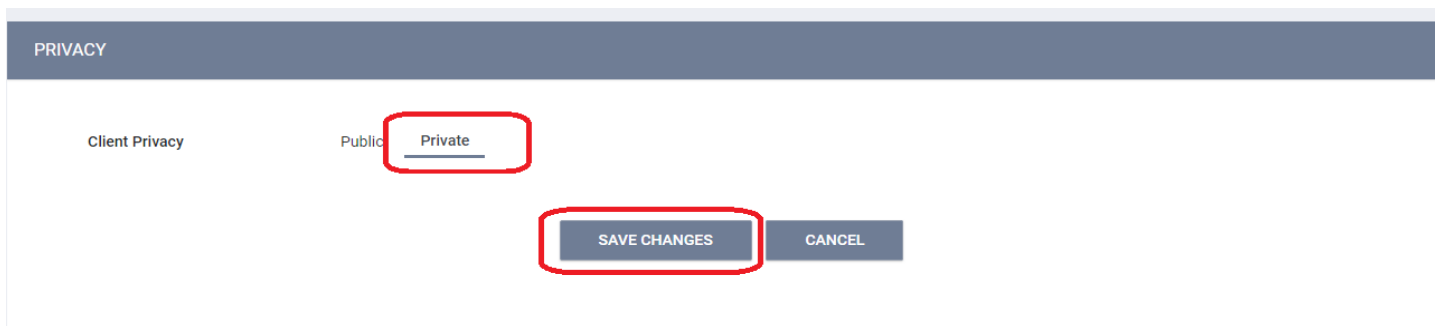
      - If you are unable to change your client's privacy settings from "Public" to "Private", email support@rtfhsd.org for assistance locking down the client record.
  - If you are able to obtain a signed MPA from the client upon further interactions, update the client's information as follows:
    - Click on the privacy shield on the right side of their client record.
    - "Un-lock" the client record by clicking on the word "Public" in the "Privacy" section and then saving changes. If you have successfully un-locked your client's

record, the word "Public" should be underlined. If you are unable to change your client's privacy settings from "Private" to "Public" email support@rtfhsd.org to request assistance.

■ Click on "Add Release of Information" and add the new MPA.

C. Enroll client into your outreach program

Navigate to the client's Programs tab and expand the option for your outreach program, then click on "Enroll".

Enter the information you have as of this interaction with the client. The initial entry may be as basic as the Project Start Date alone, but over time the data must be updated as an outreach worker develops a relationship with the client and is able to obtain more detailed information.

○ Project Start Date: This should be the date of your first contact with the client

○ For questions you do not yet have information for:

■ Select "Data Not Collected" if you were not able to collect the information yet from the client.

■ Select "Client Doesn't Know" if you asked the client the question, but they reported not knowing the answer. Continue to attempt to obtain accurate information if possible at repeated contacts.

■ Select "Client Refused" if you asked the client the question, but they refused to answer. Continue to attempt to obtain accurate information if possible at repeated contacts.

○ Click on the "Save and Close" button to save your enrollment.

D. Record first contact with the client by adding a "Current Living Situation" program assessment

After saving the client's enrollment data a new menu is now available to you under the program enrollment screen: "Assessments" - click this menu to get to the "assessments" screen which will show you program assessments.

If you need to navigate back here, you can do so by completing the following steps:

○ Click on your client's Programs tab

○ In the Program History section, hover over the line item for their active enrollment in your program, then click on the edit pencil that should show up on the left side of the item.

PROGRAM HISTORY

Program Name	Start Date	End Date
Alpha - Outreach - National City (6658) Alpha Project for the Homeless	12/19/2018	**Active**
SDHC - RRH - ESG (6429) City of San Diego ESG Rapid Rehousing	08/01/2018	11/01/2018

○ On the Assessments menu, click "Start" next to Current Living Situation highlighted in red below.

PROGRAM: ALPHA - OUTREACH - NATIONAL CITY (6658)

Enrollment   History   Provide Services   **Assessments**   Notes   × Exit

Assessments   LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START
Current Living Situation	START

○ Complete all Current Living Situation questions based on the date the client was contacted and the client's self report and/or verified location (ie. emergency shelter, hotel/motel, etc).

PROGRAM: ALPHA - OUTREACH - NATIONAL CITY (6658)

Enrollment   History   Provide Services   Assessments   Notes   × Exit

Add Current Living Situation for client Uhlig Testtrainingclient

ONLY FILL OUT THIS ASSESSMENT IF YOU ARE WORKING IN AN OUTREACH, COORDINATED ENTRY, OR A HHS:PATH SERVICES ONLY PROGRAM

Date of Contact	09/30/2019
Current Living Situation	Select ⌄
Location Details	

SAVE & CLOSE   CANCEL

- ○ Depending on your responses, you may have additional follow-up questions to ask and answer. Fill out everything you are presented with. Be sure to click "Save & Close" when you're finished filling everything out.

II. Further Contacts with Clients

A. Add a "Current Living Situation" program assessment for every new contact with a client

Every time you make contact with the client again, note this contact by adding a "Current Living Situation" program assessment to the client's active enrollment in your program.

A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A Current Living Situation (4.12) must be recorded anytime a client is met, including when a Date of Engagement (4.13) or Project Start Date (3.10) is recorded on the same day.

B. Add a Status Assessment when you have updates to questions asked in the program enrollment

As you continue to have further contacts with the client, you should be attempting to obtain additional information and engage the client. If you do obtain updated information for any of information collected in the Client Profile, update that information (such as name, DOB, etc..).

If you obtain updated information to any of the questions asked in the initial program enrollment (which include all questions listed after "Relationship to Head of Household" on this sample enrollment form) at a contact, note this new information by adding a Status Assessment. For example if the client was initially not willing to discuss their disabilities, but now is comfortable responding to questions about their disability status, you would add a Status Assessment in order to update their disability information. You do not need to add a Status assessment unless you have updates to an Enrollment question.

When you add the Status Assessment, note the Status Date as the date of this contact with the client, then update information for any questions you received updated information for.

Leave questions you did not receive updates about unchanged, then save your changes. Every contact at which you obtain updated information to the questions asked in the Enrollment should be noted with a Status Assessment in addition to an "Outreach Contact" service (which should be added for every contact with the client).

C. If and when the client is engaged, note Date of Engagement by editing the initial program enrollment

As you continue to have further contacts with the client, you should be attempting to engage the client. Engagement takes place when an interactive client relationship results in a deliberative client assessment or the beginning of a case plan.

If and when you engage the client, record their Date of Engagement. You must make this updated by editing the original Enrollment screen (rather than adding a Status Assessment). To do this, open the client's enrollment and click on the "Enrollment" tab.
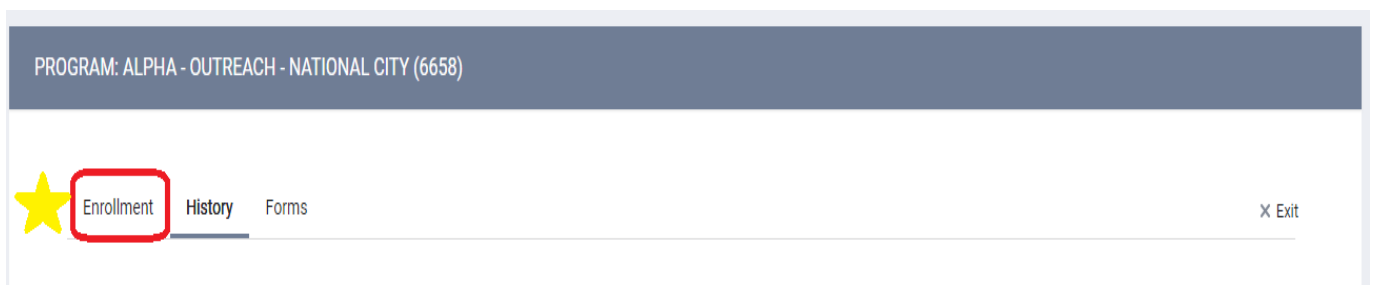
From there, fill in the Date of Engagement, then save your changes to the Enrollment screen.

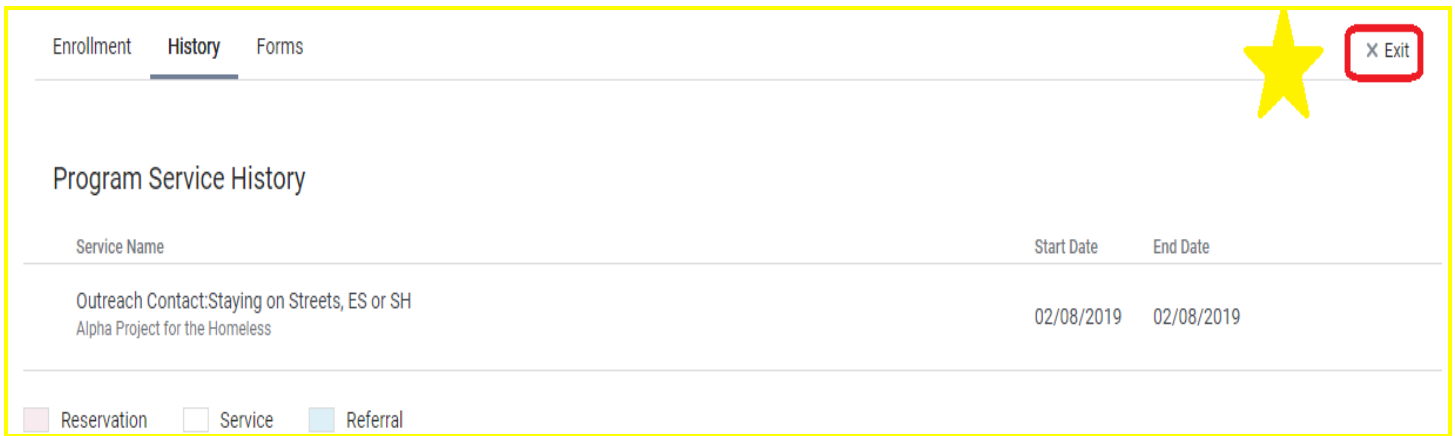### III. End of Outreach Relationship with Client

A. Exit client from program

When a client is no longer considered to be participating in your street outreach program, they should be exited from the program in Clarity. There are a number of reasons you may use to determine that a client has exited your program, including:

- The client has entered another project type (e.g., Transitional Housing, Permanent Supportive Housing) or otherwise found housing).

- The client is engaged with another outreach worker or program;

- The client is deceased;

- For outreach projects funded by: City of San Diego, The County of San Diego, San Diego Housing Commission, and Regional Task Force on the Homeless. The outreach worker has been unable to locate the client and record, at minimum, 1 in person contact in HMIS within a 30 day period to be considered active (Compliant with most up to date CoC Street Outreach Standard).

- For outreach programs not funded by the entities listed above the HMIS data standards states to exit a client if an outreach worker has been unable to locate the client for an extended length of time (e.g. 90 days from last contact) and there are no contacts recorded in the Current Living Situation field (4.12). However, RTFH

encourages all outreach projects to follow the most up to date CoC Street Outreach Standards.

When you determine a client has exited based on the aforementioned criteria, open the client's active enrollment in your program and click on the Exit button (to the far right of the enrollment tabs, "Enrollment", "History" and "Forms").

From there, fill in the client's Project Exit Date, Destination and - if you were able to collect information upon the client's exit - any updates to existing information, then save your changes.

B. Contacts after client exit from program

If you have exited a client and later you make contact with them again, you should not open the previous enrollment. Rather, add a new enrollment and follow the steps outlined above to record data for this new program enrollment.

Street Outreach Resources

- HMIS Current Living Situation Data Entry Guide

- San Diego Continuum of Care Street Outreach Standards

- HUD Exchange page with most current Data Standards Manual and Dictionary