



UNSHELTERED WORKFLOW FOR ART GALLERY 0630 – SHELTERED AND UNSHELTERED PIT REPORT

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This Unsheltered Workflow is designed for the Art Gallery 0630 – 2017 Sheltered and Unsheltered Point in Time Report (2017 PIT Report). The only settings addressed here are those that are **REQUIRED** to ensure that data is properly collected and appears in the report.

SYSTEM PREFERENCES

- ▶ There are no specific System Preferences related to this workflow.

PROVIDER ADMIN SETTINGS

- ▶ The Check Boxes for “HUD/HMIS Provider”, “Uses ServicePoint”, and “Operational”, need to be checked.
- ▶ **Profile Tab:**
 - In sub-tab Provider Profile>Module Access Settings, the “Provider Uses ClientPoint” box needs to be checked.
 - In sub-tab Standards Information>HUD Standards Information the CoC Code must be entered.¹
 - In sub-tab Standards Information>HUD Standards Information>Project Type Code one of the following type codes must be selected:
 - ◆ Emergency Shelter (HUD)
 - Method For Tracking Emergency Shelter Utilization must be set to either “Entry Exit” or “Night by Night”
 - ◆ Transitional Housing (HUD)
 - ◆ Safe Haven (HUD)
- ▶ **Assessment Tab:** An assessment collecting the bellow data elements need to be collected on an assessment that the Users entering the data has access to WITHOUT creating an Entry/Exit. There are two ways to do this:

- Through the Assessment Tab Assessment Availability under Assigned Assessments which will place the assessment on the Assessments tab in ClientPoint

OR

- Through the Assessment Tab under Assessment Display Settings select that assessment to “Show on Client Profile”. Since this workflow is specifically designed to be used WITHOUT an Entry/Exit, it is not appropriate to have the Assessment for Unsheltered Data Entry show on any of the Entry types.

¹ The report can be run by provider, in which case the CoC Code is NOT required.



ASSESSMENT ADMIN SETTINGS

- ◆ An Assessment containing the following data elements should be used – keep in mind that some elements are part of the client record (ie Veteran Status). Many Assessments in the software already have these elements – the HUD UDEs (2016) contains all of the HUD Universal Data Elements. A copy of this assessment can be made, and the additional questions needed added to that copy. Failure to collect any of these items will impact the counts in the report.
 - Data Elements
 - ◆ Name, Name Data Quality
 - ◆ Date of Birth, Date of Birth Data Quality
 - ◆ Veteran Status
 - ◆ Gender
 - ◆ Race
 - ◆ Ethnicity
 - ◆ New 3.917A UDE elements related to Chronic Homelessness (4 Qs)
 - Type of Residence (Prior Residence)
 - Length of stay in prior living situation
 - Approximate Start Date of Homelessness
 - Regardless of where they stayed last night, number of times the client has been on the streets, in ES or SH in the past three years including today
 - Total number of months homeless on the streets, in ES or SH in the past 3 years including today
 - ◆ Domestic Violence Yes/No (Optional)
 - ◆ Disability of Long Duration Yes/No
 - ◆ Disability Type (if “Yes” to Disability of Long Duration) –
 - *The “Start Date” must be BEFORE the night of the count*
 - *Types included in Sub-populations section of PIT count are Drug Abuse, Alcohol Abuse, Both Drug and Alcohol Abuse, Mental Health Problem and HIV/AIDS.*
 - *Each type will record only if “Disability Determination” = Yes **and** “If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independent” = Yes.*

Note: Household Composition: For households to be counted correctly the Data Elements must be collected on each Household member and the members properly linked on the Households Tab.



DATA ENTRY WORKFLOW

Note: The Unsheltered Count is generated based off of the creation of an Unmet need. Needs are reported from Provider Creating meaning the user must either use EDA mode or be “seated” at the provider creating to generate correctly.

➤ **EDA MODE:** For Enter Data As (EDA): *If you do not use EDA, skip to MODULE.*

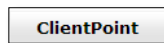
- Click on Enter Data As in the top right corner of the page under the Modes.



- Choose the appropriate EDA Provider from the list by clicking on the green plus sign next to the name of that Provider.

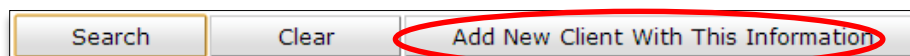


➤ **MODULE:** Click on the ClientPoint link in the left hand navigation panel.

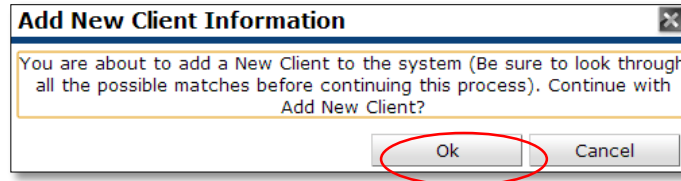


➤ **CLIENT SEARCH:** Search the database for the client. *The minimum criteria (such as the first few letters of the client’s first and last name, yields the maximum results.*

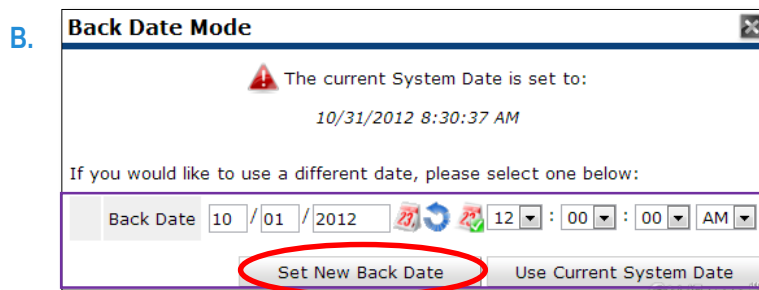
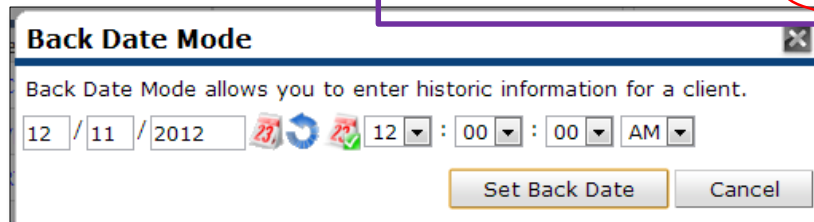
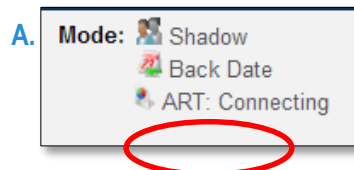
- If one of the clients in the Client Results is a match, click on the pencil next to the ID in the Client Results section at the bottom of the page.
- If the client is not found, enter the Client’s full First and Last Name, Name Data Quality, SSN, SSN Data Quality, and Veteran Status. Click on the Add New Client With This Information button. *If your workflow allows for it, an Unnamed Client can be created at this time. Do not use “Anonymous” Clients as these records cannot be de-duplicated.*



A warning window will open with a warning to look through all possible matches before continuing, click the Ok button.



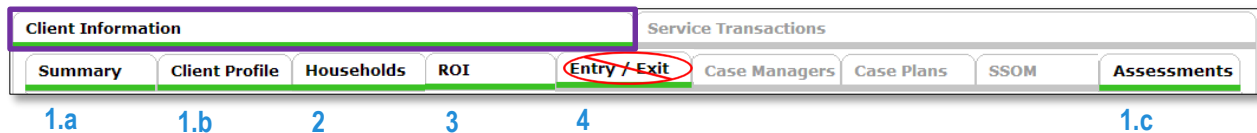
- BACKDATE:** If your data entry is being done AFTER the day of the count, you must use Back Date Mode. Set the Back Date to the date of the count (a night between January 21 – 31, 2017 unless a HUD exception has been granted). Back Date can either be set through A) the Mode section in the upper right corner of the screen OR B) via a prompt when entering a client's record.





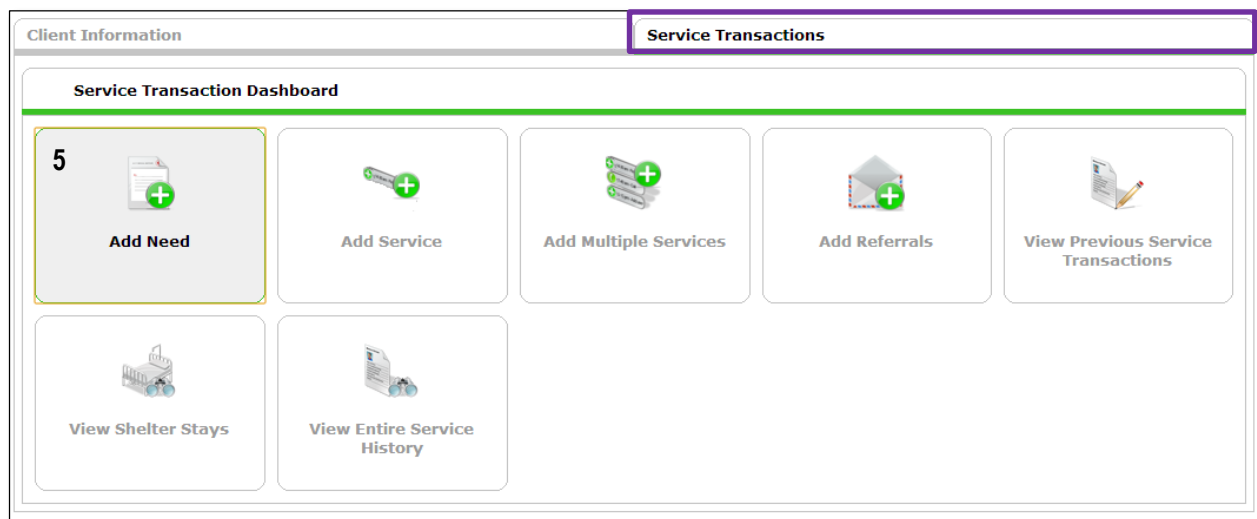
➤ **DATA ENTRY:**

- On the Client Information Tab:



1. Enter the Data Elements on either the Summary^(1.a), Client Profile^(1.b) or Assessment^(1.c) sub-tabs. *For individuals, skip to step 3.*
2. For Families, Create the Household in the Households tab.
3. A Release of Information can be entered on the ROI tab.
4. **DO NOT** create an **Entry/Exit** – clients with active Entry/Exits **WILL NOT** be pulled into the report as Unsheltered.

- On the Service Transaction Tab:



5. Click on the Add Need Icon. **The report will ONLY work if an unmet Need is entered without a Service.** *Singles skip to step 7.*



6. Household Members: Select all Household Members to be included in the Need.

7. Provider: The Provider should already be set to your EDA Provider

8. Need: Choose a need type of Emergency Service from BH-1800 to BH-1800.9000

9. Date of Need: The Date will be pre-populated with the effective date (backdate) selected when entering the Client's record.

"Amount of Financial" and "Notes" are not required and will not impact the report.

10. Status of Need: The Status should be set to Closed.

11. Outcome of Need: The Outcome of Need should be set to **Unmet**.

"If Need is Not Met, Reason" is not required and will not impact the report.

12. Select Save and Exit.

On the Entire Service History tab, you will see that the Need you entered is unmet and there are no associated Service Transactions.



Needs Services Referrals Shelter Stays **Entire Service History**

All Service Transactions

Select Dates Start Date End Date

-Select- / / Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	01/30/2013	Homeless Outreach	Emergency Shelter	Closed / Not Met	

Showing 1-1 of 1

Back to Dashboard Exit

HUD HIC/PIT NOTICE AND RESOURCES

<https://www.hudexchange.info/resource/5110/notice-cpd-16-060-2017-hic-and-pit-data-collection-for-coc-and-esg-programs/>