HMIS and Homeless Case Management (HCM) Exchange Job Aid

This job aid will explain the optional exchange of certain assessment information between HMIS and the Homeless Case Management (HCM) module of Synergy, DHS' internal enterprise case management system, when shared clients have involvement in both service areas.

The Homeless Services and Supports Coordination program was developed to provide additional support to families during their housing crisis. While engaging families during their stay in emergency shelter, the Homeless Services and Supports Coordinators focus on needs of both adults and children; assisting them to maintain connections to existing services and make connections to new services, as needed. To create a continuity of service, the Homeless Services and Supports Coordinators are able to follow the family to their next housing placement and be a long-term support for the family.

Homeless service providers will not have the ability to view or exchange HCM data during the entry assessment. HCM data will only be available to view and import in update, annual or exit assessments.

When HCM information is available to view on enrolled clients, a notice that an HCM Update Assessment is available will appear on the Dashboard reassessment tab. Service providers will have the opportunity to view HCM data on shared clients once they create an update, annual or exit assessment. The HCM data can then be viewed on a new screen at the start of each assessment called *Homeless Case Management Update.*

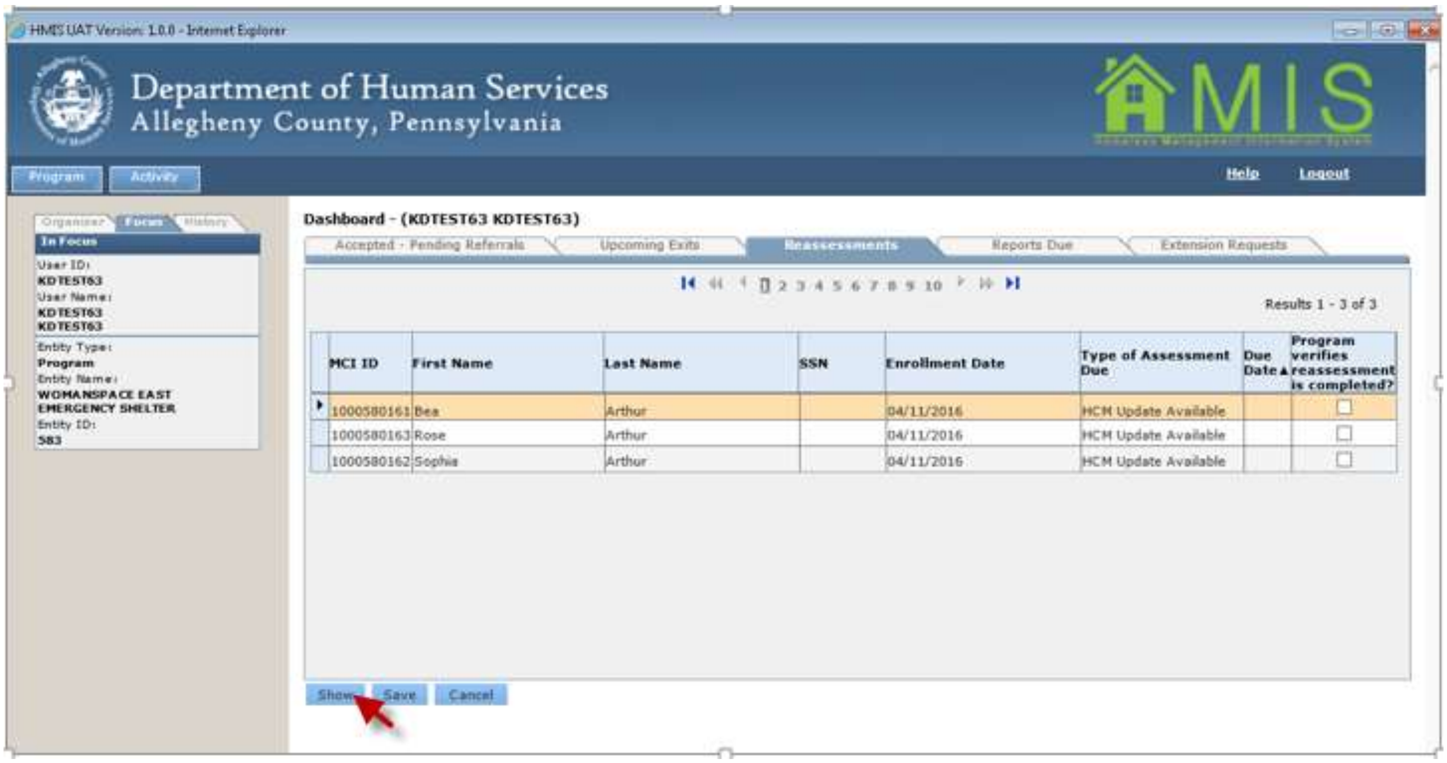
Before accepting HCM information, providers must verify the information with the household.

On the *Homeless Case Management Update* screen, service providers can view a grid showing each client, the HMIS and HCM field names and the values entered into each, and choose whether to accept or decline to import the HCM value into the current HMIS assessment. Even if HCM data is accepted and imported into the assessment, the HMIS user has the ability to change the data field while on the screen.

The fields that can be viewed and exchanged between HMIS and HCM are:

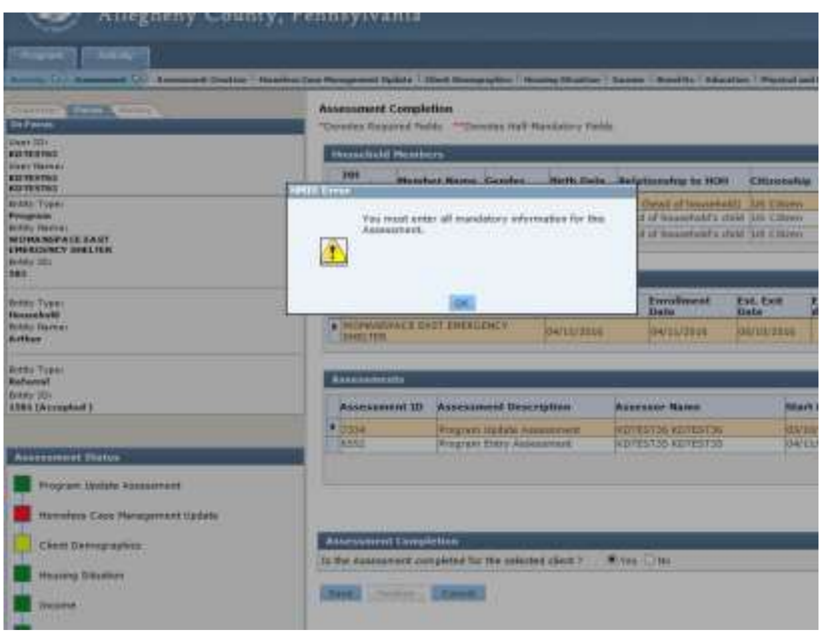
- Income source (**excluding** earned income; also **excludes** income amount and frequency)
    - **Please note: If homeless service providers choose to accept Income Source from HCM, they must verify the income amount and frequency with the client, as those fields do not exchange. The provider will need to enter those values.**
- Non-cash benefits source and if benefits are currently being received
- Health insurance type and if household members are currently covered
- Education
    - School status for all household members
    - Children 0-5: Has child received developmental screening?
    - Child older than 5: School enrollment status
    - Child older than 5: Name of school district where child is enrolled
    - Child older than 5: Name of school where child is enrolled

Viewing Homeless Case Management data for shared clients in HMIS

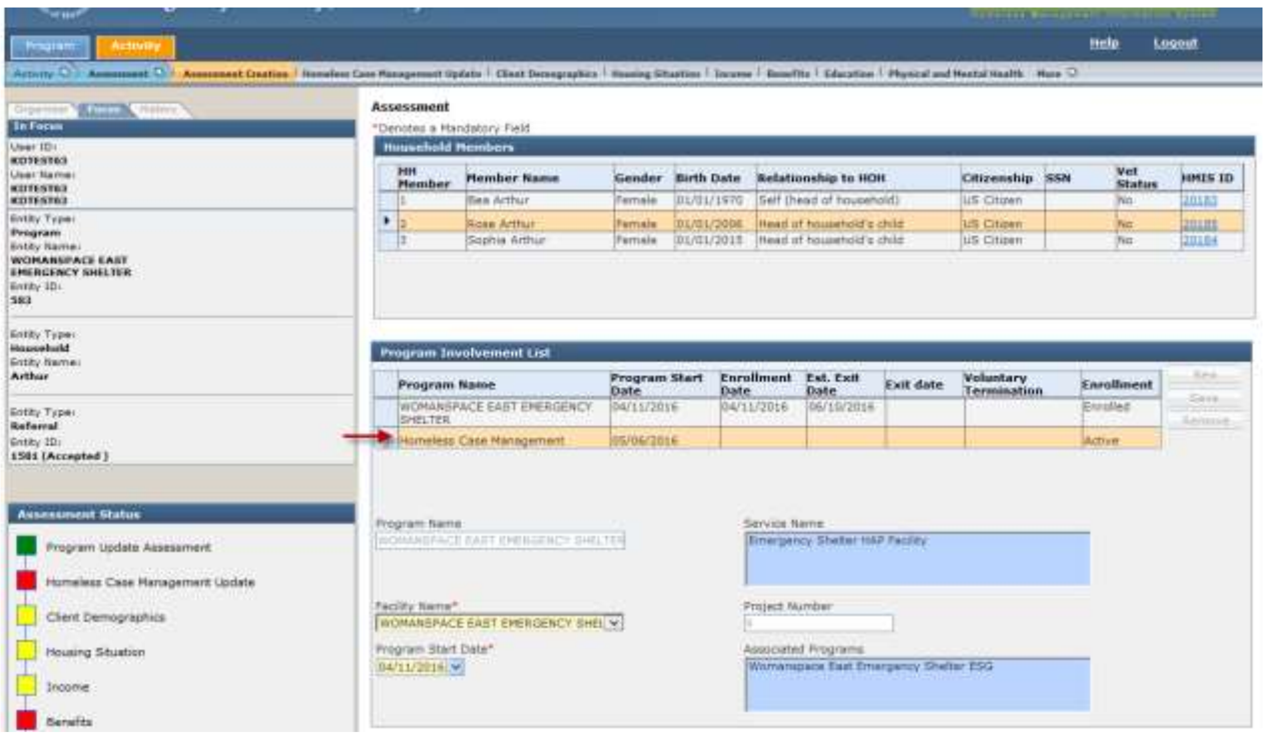


1. When a shared client has updated information in Homeless Case Management, a notification will appear in HMIS on the reassessment tab of the *Dashboard*.
    a. Select the Show button to navigate to the *Assessment Creation* screen.
    b. To view the HCM information, create a new Update, Annual or Exit assessment.
        i. As a reminder, Update assessments should be completed every 90 days, Annual assessments must be completed 30 days before or 30 days after the anniversary date of program enrollment, and exit assessments should be completed when a client exits the program.
    c. Once a new assessment is created, the updated information will appear on *the HCM Update* screen of the assessment. This is a new mandatory screen that will appear on assessments for shared clients between homeless service providers and Homeless Services and Supports Coordinators.
    d. **The available HCM information cannot be viewed in a previously completed assessment; a new assessment must be created in order to see the HCM Update.**

e. All of the HCM Update information must be either accepted or declined before assessment is completed. Until then, the *Homeless Case Management Update* box in the Assessment Status legend will remain red and mandatory to review before the assessment can be completed. It will turn green and allow the user to complete the assessment after each row of HCM information has been accepted or declined with a reason and the Submit button has been selected.



f. If the each row of the HCM Update information has not been accepted or declined at the time the assessment is marked complete, the homeless services provider will receive a validation message and must return to the HCM Update screen to accept or decline each row.
g. **Please note that the Submit button will remain disabled (grayed out) until a new assessment is created, as new HCM information cannot be viewed on a previously completed assessment.**
h. **The Submit button will remain enabled (blue) until the assessment has been marked complete by the homeless service provider.**



2. Homeless service providers can also see HCM involvement on the Assessment Creation screen in the Program Involvement List grid.
   a. If a shared client has an active HCM case, homeless providers will see a row showing HCM involvement along with the start date and enrollment status.

Accepting and Declining HCM Data

1. To view the updated information available to exchange from HCM, homeless service providers must create a new Update, Annual or Exit assessment.
    a. After creating the new assessment, select Show and navigate to *the HCM Update* screen.

2. When reviewing HCM Update information, homeless service providers must verify any changes with the client before accepting the HCM information.
    a. To accept an HCM data field, select the radio button **Accept HCM Info.**

3. To decline an HCM data field, select the radio button **Keep HMIS Data** and select a Decline Reason from the dropdown. The notes field is optional.
    a. Decline Reasons:
        i. No documentation
            1. Homeless service providers should select this option if they are unable to verify the HCM information and do not have adequate documentation.
        ii. HMIS more recent
            1. Homeless service providers should select this option if the data currently in HMIS is more up-to-date than the HCM field.
4. After all rows are accepted or declined with reason, the homeless service provider can proceed with completing the assessment.

For more information…

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to http://servicedesk.alleghenycounty.us