



HOUSING
ALLIANCE
DELAWARE

CMIS BREAKOUT SESSION

COC QUARTERLY MEETING
WEDNESDAY, JULY 21, 2021

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DATA TRAINING MANAGER

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AGENDA

REVIEW

- Centralized Intake process has changed in 2020 - How does that affect providers' data entry?
- Release of Information

UPDATES/ANNOUNCEMENTS

- CMIS Staff Additions
- FY22 CMIS License Renewal Process
- ShelterPoint → Unit Manager
- 2022 HUD Data Standards

QUESTIONS?/FEEDBACK

CENTRALIZED INTAKE CMIS PROCESS

Centralized Intake officially changed some of their processes in October of 2020
in response to HUD's 2020 Data Standards.

- Centralized Intake is now:
 - Creating CMIS profiles for all clients who contact them
 - Updating **Current Living Situation** sub-assessment
 - Enrolling eligible clients into Coordinated Entry
 - Updating **Coordinated Entry Event & Coordinated Entry Assessment**
 - Sending all Referrals (ES, TH, RRH, PSH, Diversion) through CMIS Service Transactions
 - *No longer updating income, noncash benefit, or health insurance information*
- How does this affect other providers using CMIS?
 - Less likely to need to create new CMIS profiles
 - Accepting/Declining/Canceling Referrals
 - *Always checking income, noncash benefit, and/or health insurance information and updating it*

RELEASE OF INFORMATION

- Releases of Information (ROIs) can now be entered into CMIS profiles for **three (3) years**.
- Physical ROIs need to be updated to mention the three-year ROI period (if included already) before changing process in CMIS system.

WHY?

- To better share information between providers who could potentially provide services to the same client(s).
- Shares Centralized Intake information for longer period of time.

ANOTHER REMINDER:

ENTER YOUR ROIs FOR *ALL* CLIENTS!

Other providers won't even know you're working with them if ROIs aren't entered.

1 for Organization & 1 for *each* project client is being entered into.



UPDATES & ANNOUNCEMENTS

CMIS STAFF ADDITIONS

COMING SOON!

- In August, Housing Alliance Delaware is anticipating the onboarding of:
 - Data Administrator
 - Data Support Specialist
- More information to follow.

FY22 CMIS LICENSE RENEWAL PROCESS

- CMIS Agency Partner Agreements and CMIS User Agreements will be sent out on Friday, July 23.
 - All CMIS-participating agencies must complete one (1) Agency Partner Agreement.
 - New Section! – Agency Administrators
 - All CMIS end users must complete a CMIS User Agreement, *regardless of when they joined CMIS*.
 - All User Agreements must be also signed by a Agency Administrator
- **Deadline: Friday, August 20, 2021**
- All CMIS license-related changes will be in effect on Monday, September 2.

SHELTERPOINT → UNIT MANAGER TRANSITION

- WellSky is in the process of “uplifting” the ShelterPoint module and releasing a new **Unit Manager** module by the end of 2021.
- Access to the module, as well as training sessions, will be provided by Housing Alliance Delaware before its launch.
- **Dates TBA.**

UNIT MANAGER... WHAT'S NEW

- More user-friendly interface for Bed List management
 - Beds can be marked as Available, Held, Unavailable, or Out of Service
 - Filtering and Search options
 - Entire check-in and check-out process can happen in module
- All updates (Interims) and Service Transactions will happen in ClientPoint.

The screenshot displays the Unit Manager interface for a 'Test Bed List'. At the top, there is a user profile icon and a dropdown menu for 'Provider' set to 'Delaware'. Below this, the 'Unit list' is set to 'Test Bed List', and the 'Unit list type' is 'Emergency Shelter'. There are two status indicators: '8 AVAILABLE' and '6 OCCUPIED'. Action buttons for 'ADD TO OVERFLOW' and 'MASS CHECK OUT' are visible, along with a search bar and a 'Quick Filters' section.

Quick Filters:							
AVAILABLE UNITS		SINGLE UNITS		FAMILY UNITS		OVERFLOW UNITS	
Floor	Room	Bed	Occupancy	Date of Birth	Gender	Date In	Notes
Floor 2	Room 5	Bed 001	⚠️	--	--	--	
Floor 2	Room 5	Bed 002	⚠️	--	--	--	
Floor 2	Room 5	Bed 003	🔧	--	--	--	
Floor 2	Room 5	Bed 004	🔧	--	--	--	
Floor 2	Room 4	Bed 001	Peter Parker (2420)	--	--	06/04/2021	CHECK OUT
Floor 2	Room 4	Bed 002	AVAILABLE	--	--	--	CHECK IN
Floor 2	Room 4	Bed 003	AVAILABLE	--	--	--	CHECK IN
Floor 1	Room 1	Bed 001	Bugs Bunny (2422)	06/01/1987	Male	06/01/2021	🗨️ CHECK OUT
Floor 1	Room 1	Bed 002	Tweety Bird (2423)	--	--	06/04/2021	CHECK OUT
Floor 1	Room 2	Bed 001	AVAILABLE	--	--	--	CHECK IN

On the right side, there is a 'Referrals' sidebar with columns for 'Name' and 'Referred Date'.

- Can create client profiles within module.
- Shows steps (and progress) for profile creation and program entry.

✓ Search for and select a client
Search for a client to check in.


2 Add Unit Stay Details
Enter data related to the client's unit stay, other clients participating in this unit stay, Incident information, and ROI information.

3 Add Project Enrollment
Create a project enrollment for the client and participating clients. A project "Entry" stage will automatically be created.

4 Add Assessment Data
Add assessment data relevant to this client's stay and project enrollment. All assessment data will be automatically linked to the project entry if one was created during this check-in process.

5 Confirm Unit Stay Details and Complete Check-In
Confirm the unit stay data is accurate and check the client and participating clients into the unit(s).

Add Unit Stay Details ✕



Tom Brady

CLIENT ID 2430

ISSUE ID CARD

Date of Birth

Age
Unknown

Gender
Male

Military Veteran Status
No (HUD)

Primary Race
White (HUD)

Secondary Race

Ethnicity
Non-Hispanic/Non-Latino (HUD)

Client profile is

90%
Complete

1 Questions remaining COMPLETE PROFILE

[EDIT](#)

[Show More](#) ▼

Stay Information

Unit Selected [CHANGE UNIT](#)

Floor	Room	Bed
Floor 2	Room 4	Bed 002

More to come... all End Users that use ShelterPoint should look out for further announcements!

2022 HUD DATA STANDARDS

- HUD is in the process of finalizing their Data Standards, which is done every other year to review what data element(s) they are looking for in reporting.
- The [2022 HUD Data Standards](#) will be in effect on October 1, 2021.

Some of the changes that will affect our data entry...

2022 HUD DATA STANDARDS

- **New Assessments** – HAD will be working with Agency Partners to update assessments to match the updated Data Standards.
- **New project types** – tracking programs that are a result of COVID relief

Funding Sources

49 - HUD: CoC - Joint Component
RRH/PSH
50 – HUD: HOME
51 – HUD: HOME (ARP)
52 – HUD: PIH (Emergency Housing
Voucher)

- **Closing projects** – Projects will flag for errors if all clients are not exited when a project is marked as no longer operating.

2022 HUD DATA STANDARDS

- **Client demographics** – terminology will be updated to be more inclusive
- (Not pictured) – terminology changes:
 - “Mental Health Disorder” instead of “Mental Health Problem”
 - “Substance Use Disorder” instead of “Substance Abuse”

	Before	After
Race	1 - American Indian or Alaska Native 2 - Asian 3 - Black or African American 4 – Native Hawaiian or Other Pacific Islander	1 - American Indian, Alaska Native, or Indigenous 2 - Asian or Asian American 3 – Black, African American, or African 4 – Native Hawaiian or Pacific Islander Descriptions updated
Ethnicity	1 - Hispanic/Latino 2 - Non-Hispanic/Latino	0 - Hispanic/Latin(a)(o)(x) 1 - Non-Hispanic/Latin(a)(o)(x)
Gender	0 - Female 1 - Male 2 - Trans Female (MTF or Male to Female) 3 - Trans Male (FTM or Female to Male) 4 - Gender Non-Conforming	(Select as many as apply) 0 - Female 1 - Male 4 - A gender that is not singularly ‘Female’ or ‘Male’ 5 - Transgender 6 - Questioning Descriptions, guidance, and System Logic and Other System Issues updated

COC-FUNDED PSH: NEW DATA ELEMENTS

1. Well-Being

- Information Date
- Client perceives their life has value and worth.
 - Strongly disagree to strongly agree
- Client perceives they have support from others who will listen to problems.
 - Strongly disagree to strongly agree
- Client perceives they have a tendency to bounce back after hard times.
 - Strongly disagree to strongly agree
- Client's frequency of feeling nervous, tense, worried, frustrated, or afraid.
 - "Not at all" to "At least every day"

COC-FUNDED PSH: NEW DATA ELEMENTS

2. Moving On Assistance Provided

- Date of Moving On Assistance
- Moving On Assistance
 - Subsidized housing application assistance
 - Financial assistance for Moving On (e.g., security deposit, moving expenses)
 - Non-financial assistance for Moving On (e.g., housing navigation, transition support)
 - Housing referral/placement
 - Other (please specify)



QUESTIONS?

OR GENERAL FEEDBACK –

CMIS SURVEYS WILL BE SENT OUT IN THE UPCOMING WEEKS



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