



COALITION FOR HOMELESSNESS
INTERVENTION & PREVENTION

HMIS BEST PRACTICES

UPDATED JULY 2024

TIPS AND STRATEGIES TO MAXIMIZE THE HMIS USER EXPERIENCE

Housing is a human right.

We envision an Indianapolis where everyone has a safe, stable, and affordable home and is embraced by compassionate care and an inclusive community.

STAY IN THE KNOW

HUG MEETINGS & NEWSLETTERS

At 11 AM on the second Wednesday of each month, CHIP's HMIS team hosts a virtual HMIS User Group (HUG) meeting. These meetings allow us to connect, share important HMIS updates, and showcase tools to make HMIS work easier for you!

Additionally, the HUG newsletters are a great way to stay up to date on any system changes, helpful reminders, and upcoming activities that will affect HMIS users.

To gain access to the calendar invites, please reach out to Sam Clark (sclark@chipindy.org). If you are not receiving the HUG newsletter and would like to, please reach out to Abe Roll (aroll@chipindy.org).

HMIS OFFICE HOURS

CHIP hosts HMIS Office Hours every other week! Whether you're a seasoned user or new to HMIS, this is dedicated time you can seek assistance, dive deeper into select topics, or address any issues related to HMIS! You can join us in person at the CHIP office or via Teams on Mondays, 10 am - 11 am and Thursdays, 3 pm - 4 pm!

For inquiries - or to access the calendar invites - please reach out to Sam Clark (sclark@chipindy.org).

DATA QUALITY OFFICE HOURS

Once per quarter, CHIP hosts office hours focused on data quality. These present an excellent opportunity to discuss data quality, the Notice of Funding Opportunity (NOFO), and how CHIP can support you and your team in ensuring data accurately reflects your clients' stories!

For inquiries - or to access the calendar invites - please reach out to Abe Roll (aroll@chipindy.org).

HMIS AND CES KNOWLEDGE BASE

In 2024, CHIP will be launching an HMIS Knowledge Base! This base will include how-to guides, answers to frequently asked questions, links to training, and more. Information will be available at <https://chipindy.org/hmis>

HMIS HELP DESK

When in doubt, submit a ticket! CHIP's HMIS team is happy to help troubleshoot any issues you may encounter with HMIS. [Click here for directions on submitting a ticket to the Help Desk.](#)

BEST PRACTICES FOR DATA QUALITY

DATA QUALITY

DATA QUALITY OVERVIEW

‘Data quality’ refers to how accurately our HMIS data reflects our clients. Quality data is critical for quality care for many reasons:

- It provides a clearer understanding of homelessness in Indianapolis, which (a) allows for data-driven decisions for both projects and the system, and (b) helps our CoC accurately and realistically tell the story of homelessness in our advocacy and community education efforts.
- Provides direct care staff with immediate access to client information to streamline service delivery and referrals.
- Results in more accurate and complete reports for funders and stakeholders

4 COMPONENTS OF DATA QUALITY

HUD has identified 4 components of data quality:

	DEFINITION	IMPORTANCE
COMPLETENESS	<ul style="list-style-type: none">• All clients are entered in HMIS• Complete identifying data is entered• Complete characteristics are entered• All services are entered• Complete exit data is entered	Complete data is necessary to find the right services for our clients. Incomplete data can negatively affect our ability to see population- and system-level trends, and strategize appropriately.
TIMELINESS	<ul style="list-style-type: none">• Data entered soon after collection• Changing data is up to date	Entering data in a timely manner helps ensure clients receive service connections quickly and efficiently. Timely entry also ensures data is accessible when needed and helps reduce human error in data collection.
ACCURACY	<ul style="list-style-type: none">• Data is accurately entered by staff• Trust is established to get accurate data from clients	Accurate data means our HMIS appropriately reflects the clients we serve.
CONSISTENCY	<ul style="list-style-type: none">• Common understanding of questions• Common understanding of client answers• Common knowledge of what fields to answer	When data is understood, collected, and entered consistently into HMIS, it helps ease interpretation and improves our accuracy.

TIMELY DATA ENTRY

BUILD HMIS INTO YOUR SCHEDULE

- Consider blocking off time on your calendar specifically for HMIS data
- Include an extra 15 minutes at the end of client meetings to enter HMIS data
- Complete HMIS data entry by the end of the work week so info is top of mind

- If a different staff member enters data into HMIS than the person collecting the data, be sure to communicate timeline expectations and flow of information

TIMELINESS STANDARDS FOR DATA QUALITY

“Timeliness” refers to the amount of time between when you collect client data and when it is entered into HMIS. The sooner data is in HMIS, the sooner it can be used for reporting, prioritization, and data analysis. While we encourage HMIS users to strive for 100% of data to be entered in a timely manner, we recognize this may not be realistic or possible in all cases. Therefore, a **standard of 8 days** (meaning data should be entered into HMIS within 8 days of collection) is considered on time.

Want to see how your projects are doing in data timeliness? [Click here to access a step-by-step guide on the Data Entry Timing Report.](#)

MONITORING DATA FOR ERRORS

EVA

Eva is a digital tool provided by HUD to analysis HMIS data quality. Eva checks for various data quality errors and warnings, including missing project descriptor data, duplicate enrollments, households missing a head of household, missing demographic data, and other errors. If addressed, many errors and warnings flagged by Eva can help improve a project’s data quality, potentially affecting their Data Quality score. If you would like a project(s) to be analyzed in Eva, please submit a data request at <https://www.chipindy.org/data-request-form/> and our data team is happy to assist!

DATA QUALITY DASHBOARD

CHIP has developed a Data Quality Dashboard that allows CoC organizations to see their progress on data completeness and timeliness over a desired period. [The dashboard is available here.](#) If you need your organization code, please contact the HMIS team.

HMIS ACTIVE CLIENTS REPORT

The HMIS Active Client List Report is an excellent report for looking at demographics, household information, length of enrollment, exit data, and other vital client information. A guide for running the report [can be found here.](#)

UNIVERSAL DATA ELEMENTS (UDEs)

REQUIRED DATA ELEMENTS

Each client in HMIS is required to have certain Universal Data Elements (UDEs). These UDEs reduce duplication in HMIs and are the foundation for our annual Longitudinal System Analysis (LSA) which informs strategic planning.

Each client profile must have information for the following UDEs:

- *Name*
- *Social Security Number*
- *Date of Birth*
- *Veteran Status*
- *Race and Ethnicity*
- *Gender*

Each client must have information for the following, for each project stay:

- **Disabling condition**
- **Project Start Date**
- **Project Exit Date**
- **Destination**
- **Relationship to Head of Household**
- **Enrollment CoC**
- **Housing Move-In Date**

REPORTING UDES

Every UDE must be recorded for each client. In some instances, this information is not able to be recorded. In these instances, use the following responses:

- **Client prefers not to answer:** use this to indicate a client was asked to provide information and elected not to answer. Don't worry – this will not count against you when assessing data quality!
- **Client does not know:** use this to indicate a client was unable to answer the question asked (e.g., does not know the SSN). Don't worry – this will not count against you when assessing data quality!
- **Data not collected:** use this to indicate a client **was not asked** to provide information.

For specific guidance on each UDE, please consult the [HMIS User Guide – Universal Data Elements!](#)

PRIVACY AND SECURITY BEST PRACTICES

CLIENT PRIVACY

- **DO NOT** email any personally identifiable information (name, date of birth, social security number, etc.). Encrypting the email is not sufficient.
 - **If you submit a ticket and need it expedited, please follow up with the HMIS team via email. Let us know the ticket number or submission date, but not identifiable information.**
- **If you want to troubleshoot an HMIS issue regarding a particular client, please submit a help desk ticket for your concern.**
- **If referencing a client via email, please share no more than their HMIS Personal ID number.**

TECHNOLOGY USE

- **Consider adjusting your device settings so your device will go to a lock-screen after about 15 minutes.**
- **Check for device updates frequently.**
- **Note:** most of the Scribes and trainings on HMIS are completed on a PC. If you are a Mac user and encounter issues, please contact the HMIS team through a Help Desk ticket so we can troubleshoot with you!

RELEASE TO MOU OR RESTRICT TO ORG

Items in HMIS (enrollments, case notes, etc.) can be restricted to MOU or restricted to the organization. If it is listed as "Restrict to MOU," partner organizations will be able to see the information.

GENERAL HMIS TIPS

SEARCHES

Unable to find the report or client profile you're looking for? When in doubt, use the search bar! You can also "Favorite" commonly used reports for ease of access.

HELP DESK TICKETS

If all else fails, submit a Help Desk ticket! CHIP's HMIS team will be happy to help you address any concerns or issues you run into. When submitting a Help Desk ticket, the more details you can provide, the better we will be able to assist you!

HMIS ENROLLMENTS & CASE NOTES

NEW PROFILES

- Search for a client before creating a new profile. This helps prevent duplicate profiles.
- Double check name spelling.
- Scan vital documents separately (otherwise they won't be caught by the screening system) and label appropriately.
- Ask clients if you can take and upload a photo – this is helpful especially for outreach!
- Current Living Situation – services

CASE NOTES

There are times when the Case Note feature will time out, and case notes do not autosave. To avoid the frustration of losing your notes, we recommend completing case notes in a separate, safe document, and then copying and pasting the information into HMIS. This will prevent a lot of headache!

HMIS EXITS

Exits are an important piece of our data completeness. Even if you are unable to complete a full exit interview with clients, being able to record where they are exiting to is extremely helpful. Not only does it increase our data completeness for reports such as the LSA, but there are times when outreach staff need to quickly find someone, and having updated exit destinations can streamline that outreach!

Additionally, if you are exiting a household, be sure to exit every member (if they are truly leaving your program) and not just the Head of Household! This will prevent error flags for your program down the road.

