

El Paso HMIS  
Steering Committee Meeting  
“The More You Know”



February 2022  
[epchomeless.org](http://epchomeless.org)

# What Will Be Covered?

- Errors In Reporting Due To No Services
- How To Provide Services
- Bitfocus HMIS January Update
  - Update: Deleting Exit Date & Reactivation
- Bitfocus HMIS February Update
  - Update: “Currently Enrolled” Label
- Conclusion/Questions



# Errors in Reporting

There are many reports that are used by agencies which show the amount of clients/services being provided. They include:

- ESG-CAPER Report
- APR Report
- ESG-PADS Report
- HHSP Monthly Performance Report
- Many other service based reports

## Who or what is missing?

If a client is missing from your report, always check a few details:

- ✓ Is or was the client enrolled in the program during the time frame of the generated report?
- ✓ If so, do all clients have a service assigned to them while in the program?

# How to Check Pt.1

## ✓ Check Program Start and End Date

John Wayne

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

### PROGRAM HISTORY

Program Name	Start Date	End Date	Type
EPCH - TLC Transitional Housing El Paso HMIS ⓘ	01/04/2022	02/07/2022	Individual

- If Entry and/or Exit fall within your reporting date range, they will show on both the APR and ESG-CAPER Report.
- If not, they may only show for the previous month or next month depending on the date range you run for reports.

# How to Check Pt.2

- ✓ Check for services placed in program


John Wayne

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: EPCH - TLC

Enrollment **History** Notes Files Forms × Exit

Program Service History

Service Name	Start Date	End Date	
Incentive:Incentive El Paso HMIS ⓘ	01/04/2022	02/07/2022	

Reservation  Service  Referral

- If there is no service in the Program Service History, the client will not show on the ESG-PAD or HHSP Monthly Service Report
- If a service is in place, look at the start date and end date of the service and make sure it falls within the date range of the report.

# How to Assign Services in HMIS

## If Client Is Active

### If Client is Active

1. Click on edit button of program

Program Name	Start Date	End Date
<input checked="" type="checkbox"/> EPCH - TLC Transitional Housing Plan HMIS ⓘ <input type="button" value="Edit"/>	01/04/2022	Active

2. Click on "Provide Services" tab

Enrollment History **Provide Services** Notes Files Forms

3. Provide a service for the client

Services

HMS TLC	Housing v
Income	Financial v

## If Client Is Inactive

### If Client is Inactive

1. Go to program and click on EXIT

PROGRAM: EPCH - TLC

Enrollment History Notes Files Forms

2. Scroll down and click on "Reopen Client Program" (New Feature)

Reopen Client Program

3. Once client is active again, provide services. If client needs to be active, leave as active. If not, go back to EXIT screen and click "Restore Exit Data".

Restore Exit Data

# If Client is Active

1. Click on edit button of program

Program Name	Start Date	End Date
 EPCH - TLC Transitional Housing El Paso HMIS 	01/04/2022	Active

Edit

2. Click on “Provide Services” tab

Enrollment   History   Provide Services   Notes   Files   Forms

3. Provide a service for the client

Services

HMIS TLC

Housing ▾

Incentive

Financial ▾



# If Client is Inactive

1. Go to program and click on EXIT

PROGRAM: EPCH - TLC

Enrollment History Notes Files Forms

X Exit

2. Scroll down and click on “Reopen Client Program” (New Feature)

SAVE & CLOSE

CANCEL

Reopen Client Program

Audit Log

3. Once client is active again, provide services. If client needs to be active, leave as active. If not, go back to EXIT screen and click “Restore Exit Data”.

SAVE & CLOSE

CANCEL

Restore Exit Data

Audit Log

# Bitfocus HMIS Update-January

## New — “Reopen” Program Button

**Overview:** This update introduces a *Reopen Client Program* button on the client Program Exit screen that allows you to reopen a Program enrollment for a client.

NEW  
UPDATE!

PROFILE	HISTORY	SERVICES	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	REFERRALS	LOCATION
DISABLING CONDITIONS AND BARRIERS									
Physical Disability	No								
Developmental Disability	No								
Chronic Health Condition	No								
HIV - AIDS	No								
Mental Health Problem	No								
Substance Abuse Problem	No								
MONTHLY INCOME AND SOURCES									
Income from Any Source	No								
NON-CASH BENEFITS									
Receiving Non-Cash Benefits	No								
HEALTH INSURANCE									
Covered by Health Insurance	No								
SAVE & CLOSE					CANCEL				

# How Do I Remove a Program Exit?

Sometimes a client or household is unintentionally exited from a Program enrollment. In these cases, you may reopen the enrollment using the Reopen Client Program button on the client Program Exit screen. (Bottom right corner)

## NON-CASH BENEFITS

Receiving Non-Cash Benefits No ▼

## HEALTH INSURANCE

Covered by Health Insurance No ▼

SAVE & CLOSE

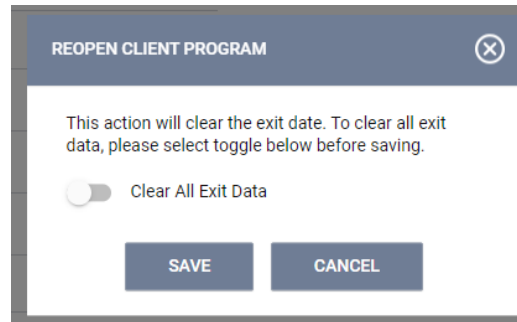
CANCEL

Reopen Client Program

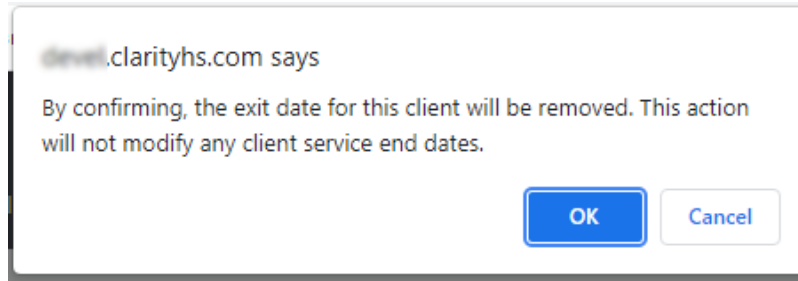
Audit Log

# How Do I Remove a Program Exit? PT2

When you click Reopen Client Program, you will see a pop-up with a Clear All Exit Data toggle.

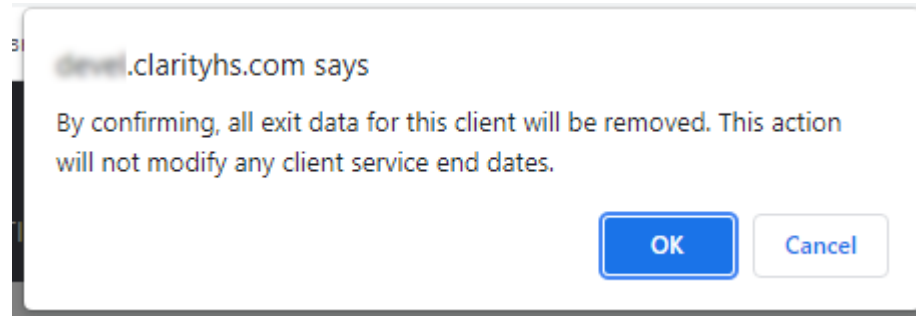


To reopen the enrollment with just the exit date removed, leave the *Clear All Exit Data* toggle **off** and click *SAVE*. The alert below will appear; click *OK*.



## How Do I Remove a Program Exit? PT3

To reopen the enrollment with the exit date and all of the exit data removed, turn the Clear All Exit Data toggle on and click SAVE. The alert below will appear; click OK.



You can then leave the enrollment open if needed, or if you simply reopened the enrollment for a quick data fix, you can make that change and then close out the enrollment.

# How Do I Remove a Program Exit? PT4

When closing out a reopened enrollment, you can click the Restore Exit Data button to restore the previously entered exit data, including the previous exit date.

SAVE & CLOSE

CANCEL

Restore Exit Data

Audit Log

- *When you use the Reopen Client Program function, any services that were ended at exit will retain their end date.*
- *You cannot remove a Program exit by deleting the Program exit date and saving the screen. The system will now highlight the Program Exit Date field in red and will not allow you to save the updated enrollment.*

# Bitfocus HMIS Update-February

NEW UPDATE!  
Feb. 28th 2022

## Updated — “Currently Enrolled” Label

**Overview:** We have updated the **Include group members** list that allows you to select members of a client’s household to include in an [enrollment](#) for that client. The system will now display a **Currently Enrolled** label for other household members who are actively enrolled in the same Program (i.e., there is no enrollment end date, or the end date is after today).

The screenshot displays the 'City Shelter' interface. At the top, it shows 'Active Clients' with a circular gauge indicating 1 client. Below this, a legend shows 0% Families and 100% Individuals. The 'Funding Source' section includes 'HUD ESG - Emergency Shelter (operating and/or essential services)' and 'Availability: Full Availability'. The 'Service Categories' section lists 'Housing' and 'Food' with checkmarks, and 'Mental Health' with a checkmark. At the bottom, the 'Include group members' section features a red-bordered box containing a toggle switch for 'Tom Test (Currently Enrolled)'.

City Shelter

Active Clients

1  
CLIENT

0 % Families  
100 % Individuals

**Funding Source**  
HUD ESG - Emergency Shelter  
(operating and/or essential  
services)  
**Availability**  
Full Availability

**Service Categories:**  
✓ Housing  
✓ Food  
✓ Mental Health

**Include group members:**

Tom Test (Currently Enrolled)

# “Currently Enrolled” Label Pt1

**Overview:** We have updated the **Include group members** list that allows you to select members of a client’s household to include in an [enrollment](#) for that client. The system will now display a **Currently Enrolled** label for other household members who are actively enrolled in the same Program (i.e., there is no enrollment end date, or the end date is after today).


City Shelter ^

**Active Clients**

**1**  
CLIENT

0 % Families  
100 % Individuals

---

 **Funding Source**  
HUD.ESG – Emergency Shelter  
(operating and/or essential services)  
**Availability**  
Full Availability

**Service Categories:**  
✓ Housing  
✓ Food  
✓ Mental Health

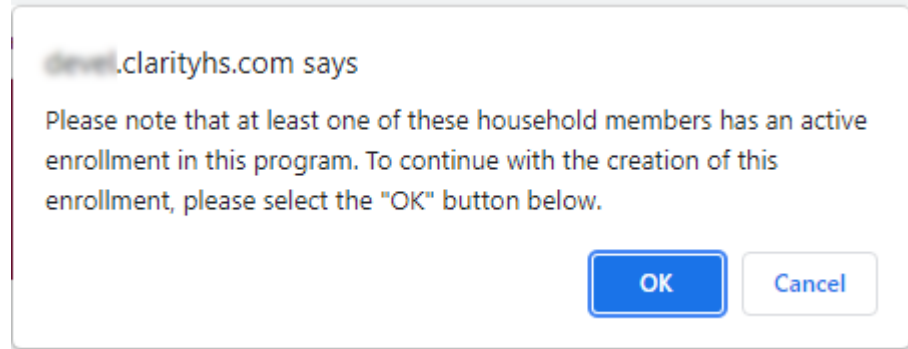
**Include group members:**

Tom Test (**Currently Enrolled**)



# “Currently Enrolled” Label Pt2

If you turn on the toggle to select a “Currently Enrolled” family member and click *ENROLL*, the system displays the following pop-up: “Please note that at least one of these household members has an active enrollment in this Program. To continue with the creation of this enrollment, please select the “OK” button below. “



- If you click *OK*, the Enroll page opens, and you can create an enrollment for all of the household members you selected (including household members that already have an enrollment in this Program).
- If you click *Cancel*, you can deselect household members as appropriate and click *ENROLL* again.

# Conclusion

- Always check for a service within the program on each client before running a report.
- Enrollment and service dates should be within the report date range in order for a client to show on a report.
- January update is live and all users have the ability to delete and restore exit data.
- February update scheduled to release later this month
- Updates will be posted on the EPCH Website under HMIS
- Questions?

# EPCH HMIS “Eyes on the Fries!”

## Bi-Weekly Zoom Lunch Meeting!

- **Open to anyone who needs help or has questions with HMIS!**
- **Zoom meeting will be from 11:30am-1:30pm**
- **First meeting is this Friday 2/11/22!**
- **Bring your questions, concerns and lunch!**
- **Hosted by Denver Herald (HMIS Tech)**

**Hope To See You There!**



# Thank you!



EPCH Contact Information:

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**WE ARE HERE TO HELP!**