

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



March 2024  
[epchomeless.org](http://epchomeless.org)

# What Will Be Covered?

- Clarity Updates- March 2024
- Build Your Case: Using various tabs for documentation
  - Contact
  - Files
  - Location
- Positive Housing Destinations (Street Outreach)
- Conclusion/Questions



# Clarity Update-March 2024

- March 2024 updates include Bulk Exit Active Clients feature and enrollment in Encampment program in the Outreach tool.
- Updates will be live on 3/25/2024.

Coming Soon!

## Clarity Human Services: March 2024 Feature Updates

This month's release includes a new Bulk Exit Active Clients feature and the ability to enroll clients in Encampment programs from within Outreach.

### Release Schedule:

- **All Training Sites:** Monday, March 11, 2024
- **All Production Sites:** Monday, March 25, 2024

# Bulk Exit at Program End Date

- A new Bulk Exit Active Clients toggle has been added to the Program Setup screen to enable the ability to exit all actively enrolled clients from a program on the program's Operating End Date.

The screenshot shows a web form titled "ADD A NEW PROGRAM". The form contains several fields and controls:

- Program Name: Text input field
- Alias: Text input field
- Program Description: Text area
- Program Template: Dropdown menu with "Select" and a downward arrow
- Operating Start: Date picker with a calendar icon
- Operating End: Date picker with a calendar icon
- Bulk Exit Active Clients**: A toggle switch, currently turned off, highlighted with a red rectangular box.
- Status: Dropdown menu with "Active" and a downward arrow
- Enable on Customer Portal: Toggle switch, currently turned off

At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".

This will help with a few things:

1) This will ensure all clients are exited from the program and not stay active for a long period of time.

2) This will also help with reporting to ensure clients are listed as exited from the program when program is finished for the year.

# Outreach Encampment Program

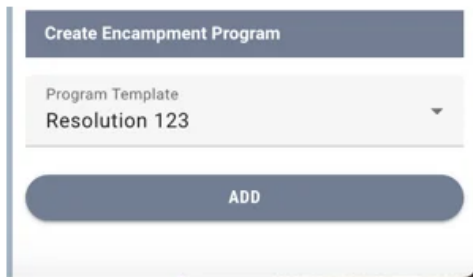
Outreach teams will soon be able to enroll clients into an Encampment Program. Encampment programs can be used to track encampment resolution initiatives and will allow users to tie location updates to enrollments.



The Encampment program contains:

- Program Name (With Encampment Name)
- Encampment program Start Date
- CoC Number
- Public Listing-NONE
- Encampment program End Date

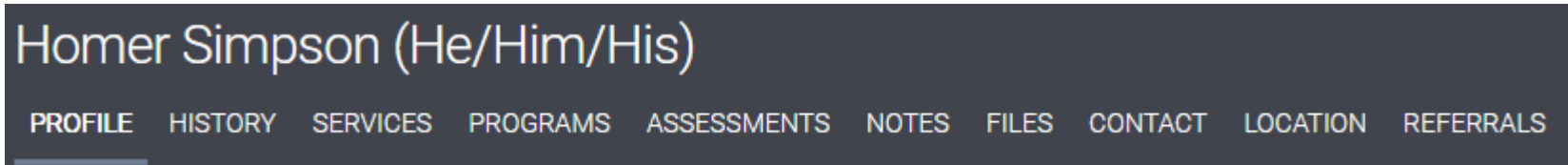
To create an Encampment Program, select one of the [Program Templates](#) available to link to that Encampment from the drop-down menu, then click *ADD*.



# Tabs for Documentation

HMIS has various ways to document for your client. Weather it be a home visit, getting a client housed, or providing supporting documents. If you think it should be documented in HMIS, it more than likely can be. We have various ways to get the information stored in HMIS.

In HMIS you will see the various tabs when under a client profile:



The various tabs allow us to navigate and find the information needed to serve clients.

Lets go through some that can really help your client!

# CONTACT Tab

The CONTACT tab allows users to document clients phone numbers and email address. This way, if any case manager or admin needs to get a hold of the client, instead of looking through files, you can find it in HMIS.

Homer Simpson (He/Him/His)

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

This tab should always be used to gather clients phone number (Cell & work number) and email address if possible. This can always be updated as well. Always check if the contact information is correct for the client.

Use this as much as possible!! EPCH always look to make sure you are capturing this.

# How to enter CONTACT info

1) Click on CONTACT tab below clients name on client profile

Homer Simpson (He/Him/His)

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

2) Click on ADD CONTACT button

CLIENT CONTACTS

ADD CONTACT (+)

3) Enter Email and phone numbers.

Contact Type

Client



Email

Phone (#1)

XXX-XXX-XXXX

Phone (#2)

XXX-XXX-XXXX



# How to enter CONTACT (Cont.)

4) Make sure Active Contact is toggled ON and if needed, toggle on Private

Active Contact



Private



5) Use today's date for the Contact Date & provide any notes needed.

Contact Date



Note

A text input field for notes. It includes a rich text editor toolbar with icons for Bold (B), Italic (I), Bulleted List, and Numbered List.

6) Click SAVE CHANGES to add the contact information

SAVE CHANGES

CANCEL

# FILES Tab

The FILES tab allows user to upload any documentation to a clients profile and can be viewed by agency users or admins if needed. If share setting are set, you can share files with other agencies.

Homer Simpson (He/Him/His)

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

This tab is to provide scanned or downloaded documents for clients including copies of clients birth certificate, social security card or ID, Lease agreements and renewals, health & legal documents, W-9 forms and many others.

If you have documents to help your case for this client, upload them!

# How to upload Files

- 1) Click on the **FILES** tab below clients name on client profile

Homer Simpson (He/Him/His)

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

- 2) Click on **ADD FILE** button

CLIENT FILES

ADD FILE (+)

- 3) Select the **Category** and **Predefined Name**

Category HPRP Documentation ▼

Predefined Name Lease ▼

- 4) Click on **Select File** button




File

Select File

# How to upload Files (Cont.)

NOTE: You can only upload up to 4MB or 4,000 KB per file. If the file you want to upload is larger than that, you must break it up into two separate files.

5) Select the file to upload & click Open.

Name	Date modified	Type	Size
▼ Today			
 stff-104_1710190775.pdf	3/11/2024 2:59 PM	Adobe Acrobat D...	65 KB
▼ Last month			
 Homer Simpson Lease.pdf	2/28/2024 2:44 PM	Adobe Acrobat D...	49 KB
 hudx-233_1709155436.pdf	2/28/2024 2:23 PM	Adobe Acrobat D...	58 KB

6) Click on ADD RECORD

ADD RECORD

CANCEL

# LOCATION Tab

The LOCATION tab is used to document where a client is staying and/or living. This is mainly used for RRH and Street Outreach Programs.

Homer Simpson (He/Him/His)

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

This is best used to specify the location of someone's housing placement, even if its within the grounds of your agency, or if a client is staying in an encampment or tunnel and you want to document this as their last known location.

Use this when clients get housed or when clients are found on the street!

# How to add a LOCATION

1) Click on the **LOCATION** tab below the clients name on client profile

Homer Simpson (He/Him/His)

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

2) Click on ADD ADDRESS or click on the GPS location icon

CLIENT LOCATION



3) Select Address Type (Home, Encampment or Tunnel) and add the Name of location

Address Type	Home	▼
Name	Deer Palms	

4) Click ADD LOCATION to provide address

# How to add LOCATION (Cont.)

5) Enter the address of the location of the apartments or enter the two cross streets (SO).

ADD LOCATION ✕

Address 6350 Deer Ave, El Paso, TX, 79924, USA

6) Make sure the location shown on the map is correct and click ADD



 CURRENT LOCATION

CANCEL

ADD

# How to add LOCATION (Cont.)

7) On Address (Line 2), you can add the building number and apartment number

Address (line 2)

Building A, Unit #4

8) Add Location Date and make sure Active Location is toggled on. Use Private as needed.

Location Date

\_\_/\_\_/\_\_ 

Active Location



Private



9) Add any notes needed and click Save Changes

SAVE CHANGES

CANCEL



# UPDATE: Street Outreach

There has been an update when it comes to Destinations for people exiting Street Outreach. HUD has now added that when a client exits from a Street Outreach program to ES, Institutional Situation (Excluding Jail), any Temporary Situation or Permanent Housing Situation, they will be counted as “Total persons exiting to positive housing destinations” in Q23c. Exit Destination of the APR or ESG CAPER.

## Q23: Exit Destination Information

### Q23c: Exit Destination

**Report Relevance:** CoC APR and ESG CAPER

**Changes from CAPER FY 2023:** Updated format, values, and restructuring for new categorization headings: (Homeless Situations (100-199), Temporary Housing Situations (300-399), Institutional Situations (200-299), Permanent Housing Situations (400-499), Other (1-99).

39	Subtotal						
40	TOTAL						
41	Total persons exiting to positive housing destinations						



# Conclusion

- Keep any eye out for HMIS update. Update should go live on 3/25/2024. If you have any questions or would like these implemented for your programs, let us know!
- Use the tabs in HMIS to your advantage. If you feel like it should be entered in there, do it! The more information we have, the better we can help serve our clients
- If you have any questions on the updated programming for Street Outreach, reach out to us and we can talk about it more!

**Any Questions?**

# EPCH HMIS “Eyes on the Fries!”

## HMIS Zoom Lunch Meeting!

- **Open to anyone who needs help or has questions with HMIS!**
- **Zoom meeting will be from 11:30am-1:30pm**
- **Next meeting is on Friday 3/29/2024!**
  - **Bring your questions, concerns and lunch!**
- **Hosted by Denver Herald (HMIS Tech)**

**Hope To See You There!**



# Thank you!



Seeing  
errors  
in HMIS



Calling  
EPCH for  
HMIS Help

EPCH Contact Information:

-Gary Gray-HMIS Senior Administrator

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5pm)

(915) 843-2170

WE ARE HERE TO HELP!