

Georgia Homeless Management Information Systems

Policies And Procedures Manual



<hmis>

Version 1.1

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Section A. Background and Structure

Section A.1 Background

A Homeless Management Information System (HMIS) is a software application designed to record and store client-level information on the characteristics and service needs of homeless persons. An HMIS is typically a web-based software application that homeless assistance providers use to coordinate care, manage their operations, and better serve their clients.

HMIS implementations can encompass geographic areas ranging from a single county to an entire state. An HMIS knits together homeless assistance providers within a community and creates a more coordinated and effective housing and service delivery system.

The U. S. Department of Housing and Urban Development (HUD) and other planners and policymakers at the federal, state and local levels use aggregate HMIS data to obtain better information about the extent and nature of homelessness over time. Specifically, an HMIS can be used to produce an unduplicated count of homeless persons, understand patterns of service use, and measure the effectiveness of homeless programs.

The Georgia Homeless Management Information System was started in 2002. Pathways Community Network was designated as the State of Georgia's sole HMIS provider. The PATHWAYS COMPASS has been around since 1999 when it was developed to assist homeless service providers in Atlanta to share information and case manage their clients. By 2004, Pathways incorporated the HUD data standards and had added a number of agencies to the system from across the state. Currently the Georgia HMIS has over 300 active agencies and has entered over 450,000 individuals and families into PATHWAYS COMPASS since 1999. The Georgia HMIS is a shared system, meaning agencies that are serving the same person can view information and coordinate services using HMIS.

Section A.2 HUD Data and Technical Standards

HUD published the Homeless Management Information System (HMIS) Data and Technical Standards Final Notice on July 30, 2004. The final notice describes the types of data that HUD-funded providers must collect from clients receiving homeless assistance services. The notice also presents privacy and system security standards for providers, Continuums of Care and all other entities that use or process HMIS data.

You can access the Data and Technical Standards at:

<http://www.hmis.info/Resources/724/Data-Standards-Training-Module-1-Handout-HUD-Data-and-Technical-Standards.aspx>

You can also access the Frequently Asked Questions document developed by Abt at:

<http://www.hmis.info/Resources/726/Data-Standards-Training-Module-2-Handout-HMIS-Data-Standards-FAQ.aspx>

Section A.3 Annual Homeless Assessment Report (AHAR)

Over the past several years, Congress has directed the U.S. Department of Housing and Urban Development (HUD) to assist local jurisdictions in implementing Homeless Management Information Systems (HMIS) and in using data from these systems to obtain an unduplicated count of homeless persons, analyze local patterns of services usage, and assess local service needs.

The AHAR uses aggregate HMIS data from communities across the country to produce a national report on homelessness to the U.S. Congress. The AHAR is designed to:

- Develop an estimate of the number of homeless persons nationwide;
- Create a descriptive profile of homeless persons;
- Understand service use patterns; and,
- Estimate the nation's capacity to house homeless persons.

The AHAR is based on an unduplicated count of homeless persons within each community, and focuses on persons who use emergency or transitional shelters. Thus, the AHAR reports only on the number of sheltered homeless persons and does not account for homeless persons who: only use a supportive service program, are formerly homeless and living in permanent supportive housing; or are service resistant and do not access any type of homeless service program during the study period.

Eventually, all Continuum of Care will most likely submit AHAR data. Therefore, it is important that all programs, especially those that provide shelter or housing, enter data accurately and in a timely manner.

For more information on Annual Homeless Assessment Report, see www.hmis.info

Section A.4 Georgia HMIS Organization and Management

Project Goals

The goals of the GA HMIS Project are:

- 1) Assist homeless persons to navigate the continuum of care
- 2) Assist homeless service agencies with information allowing them to better serve their clients
- 3) Assist homeless agencies, local, state and Federal entities with information on numbers of homeless persons, reasons for homelessness, services they require, services they receive, gaps in services, etc.

Project Organization

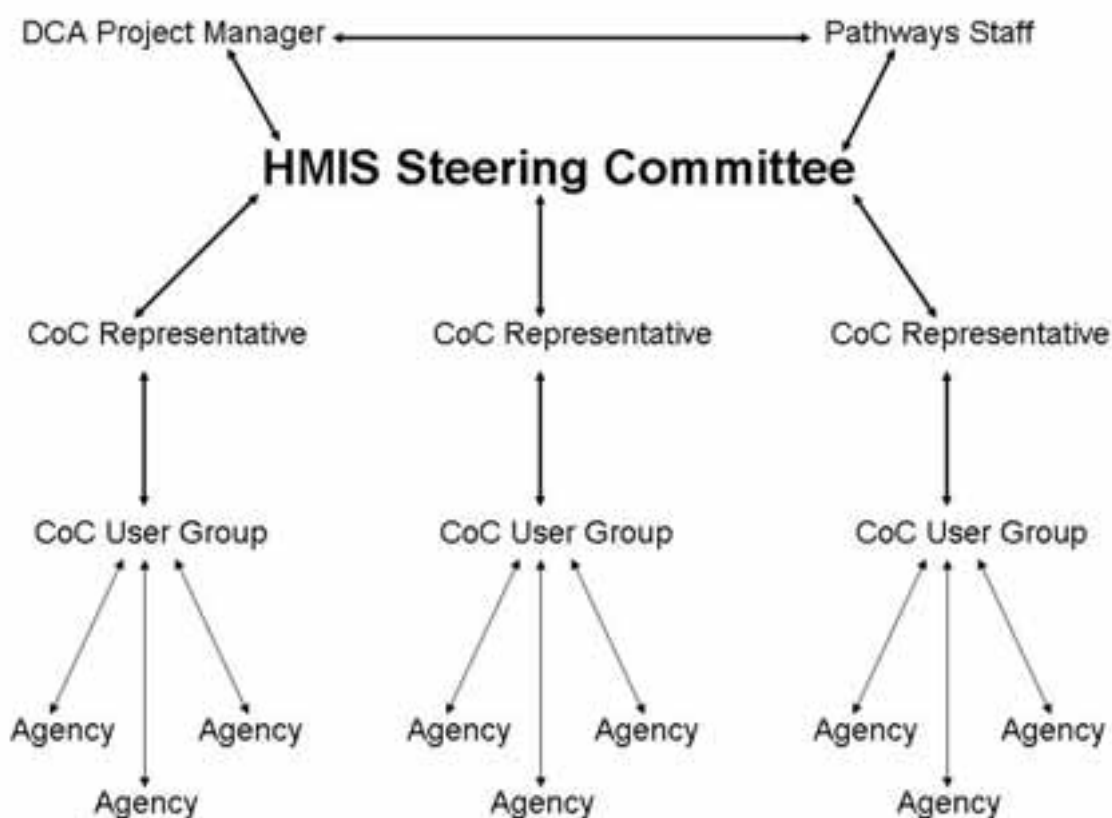
The Georgia HMIS is a collaborative statewide effort to implement HMIS across all seven Georgia continuums of care. The Lead Agency in Georgia is the Department of Community Affairs. The lead agency oversees the HMIS project and manages the Supportive Housing Program grant from HUD, however each Continuum of Care is responsible for ensuring that the implementation is successful in their Continuum.

HMIS System Development and Planning

Each CoC is responsible for soliciting feedback from agencies and stakeholders and communicating that feedback to the Steering Committee. Each CoC should establish an advisory group made up of agencies and other stakeholders in order to solicit feedback on HMIS implementation. The CoC representative should then bring this feedback to the Steering Committee.

The Steering Committee is made up of representatives from each of the seven continuum of care, the DCA project manager, and Pathways staff. The role of the steering committee is to oversee overall implementation and request enhancements to the Pathways system.

PROJECT DEVELOPMENT ORGANIZATION CHART



HMIS Implementation

Each CoC is responsible for ensuring that all agencies in that CoC are adhering to the State or Local CoC HMIS policies. The CoC lead should coordinate directly with Pathways in order to develop a training and technical assistance plan that will allow them to troubleshoot any problems in implementation. Agencies can also request training and technical assistance from Pathways directly, however, Pathways should communicate these requests as well as any training and technical assistance provided to the Continuum of Care representative on a regular basis.

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If a user or agency has a request for a system for a **system enhancement** they should communicate the request to their CoC lead that will pass it on to the project manager once it has been reviewed. The HMIS enhancement request form can be downloaded from the DCA website.

Pathways System Errors

For issues related to system errors, agencies and the continuum of care representatives should communicate directly with Pathways. System errors can be reported through the system itself using the “purple button” or by calling Pathways Support. Pathways will provide the steering committee and project management with regular updates on any system errors reported and the status of their repair.

Project Management

The key contact at the Department of Community Affairs is the Project Manager, Lindsey Stillman.

The lead contacts at Pathways are Jeanette Pollock, Pathways Training Coordinator and Tommy Phillips, Pathways Community Relations.

Cobb and Augusta/Richmond have dedicated HMIS Administrators who are the lead contact for any HMIS issues.

Cobb HMIS Administrator – Joan Toder
Augusta HMIS Administrator – Henry Holt

In Continuum without a dedicated HMIS Administrator, agencies should contact the CoC Lead for any HMIS issues. The lead contacts for each Continuum of Care are as follows:

Athens/Clarke – Evan Mills
Augusta – Vicki Johnson
Balance of State – Lindsey Stillman
Cobb – Bill Hanson
Columbus/Muscogee – Liz Dillard
Savannah/Chatham – Mark Baggett
Tri-J (Fulton, Dekalb, Atlanta) – Tommie Jones

Complete contact information for each of these individuals can be found in section H.2.

Georgia HMIS Standard Operating Procedures

Roles and Responsibilities

User	Agency	CoC Representative/ HMIS Administrator	DCA Project Manager	Pathways Staff
Maintain C&E Certification	Attend Advisory/User Group Meetings	Obtain Feedback from User Group	Manage GA HMIS SHP Project	Attend Steering Committee
Maintain Password	Ensure Adherence to Relevant HMIS Policies	Attend Steering Committee	Coordinate Steering Committee	Develop Enhancements as Directed by Steering Committee
Obtain Client Consent	Ensure Adherence to HMIS Privacy and Security Policies	Inform Agencies of Continuum Specific Policies	Obtain Feedback from Continuum Representatives	Assist Continuums with Monitoring Data Quality and Completeness
Enter and Update Data	Communicate Concerns and Enhancement Requests to Continuum Representative	Monitor HMIS Utilization by CoC Agencies	Compile Continuum Requested Enhancements for Steering Committee	Monitor Agency and System Security
Adhere to Privacy and Security Policies	Communicate Bugs to Pathways and Continuum HMIS Administrator	Communicate Concerns and Enhancement Requests to Project Manager	Monitor Project Progress and Deliverables	Repair System Errors in a Timely Manner
	Request Support and Technical Assistance from Pathways when needed	Communicate Bugs to Pathways	Monitor Adherence of Pathways COMPASS to HUD HMIS Data and Technical Standards and Guidelines	Ensure System is Operational and Accessible
		Troubleshoot Implementation and Training Needs with Pathways and provide additional assistance to agencies as needed	Communicate National HMIS Best Practices to Steering Committee	Provide Ongoing Reports to Project Manager and Steering Committee on issues of Data Quality; Training and Technical Assistance Provided; Enhancement Project Progress; Bug List and Fixes; HMIS Utilization Rates; Security Audit Findings
		Approve AHAR submission		

Section A.5 State and Local HMIS Policies

DCA has developed a policy regarding utilization of HMIS for all DCA grantees and Balance of State Continuum of Care grantees. The policy can be found on the DCA website and may be updated periodically. This policy states that the participation requirements are as follows:

- All DCA-funded agencies and agencies participating in the Balance of State Continuum of Care must actively participate herein defined by meeting the standards outlined in Section II. HMIS requirements for DHR-certified domestic violence agencies are waived until further notice.
- Grantees must provide basic information for each program created in the system and keep this information updated and accurate. All grantees must have separate programs for emergency, transitional and permanent housing programs. In addition, overflow beds and housing vouchers should each have a separate program. If a shelter or housing program has beds across multiple continua, separate programs must be created for the beds in each continuum.
- All persons who are “homeless” or near homeless should be entered into the HMIS system regardless of whether or not they are served with DCA funds. At a minimum, grantees are required to enter all DCA required data elements into the HMIS system for 75% or more of the clients they serve.
- Soup kitchen and other short term service programs that see large numbers of persons in poverty, including homeless persons, for limited periods of time are expected to provide HMIS-compliant outreach in conjunction with those services in a reasonable way, as determined on a case-by-case basis by DCA.
- Shelter and housing programs are required to ensure that they enroll 75% of the clients served into the bed program in a timely manner. In addition, individuals must be discharged from the bed program within one week of their actual discharge.
- Efforts should be made to document all key service transactions provided to clients. Permanent supportive housing providers may be exempt from documenting service transactions through HMIS if all services are tracked using the DHR required client tracking system, however PSH providers are still required to track universal data elements and program enrollment through HMIS.
- If the Grantee is not able to serve a particular client, Grantee must make every effort to record “universal” data on the person into the HMIS and to make an appropriate referral to service providers based on the needs of the individual/family.
- In the event of conflict between federal, state and local government and/or local Continuum of Care HMIS policy, the higher standard must be met.

In addition, the DCA policy lays out the following implementation standards:

- All agencies must comply with the current HMIS Privacy, Confidentiality, and Security standards issued in the HUD Notice on 7/31/2004. These standards require, but are not limited to: installing virus protection software, with an automatic update on every computer that accesses HMIS; activating a locking screen saver on every computer that accesses HMIS; developing a data privacy policy; posting the agency’s privacy policy on its website (if one exists); installing an individual or network firewall; and posting “purpose for data collection” signs at each intake desk.
- Documentation of client authorization/refusal must be maintained. Individuals refusing to authorize participation in HMIS should complete a Refusal form which should be kept in

their case record. Equivalent information must be gathered and documented in the case record if an individual refuses to participate.

- DCA staff will monitor HMIS participation through periodic monitoring visits and periodic review of data in the system.
- Failure to comply with HMIS participation requirements may result in withholding of payments until compliance is documented, or termination of grants.
- Grantees with ESG or HOPWA funds approved for housing support (case management) may utilize those funds for HMIS costs, including fees, hardware, basic software (virus protection/spyware, networking/firewall, operating system, productivity software such as MS Office, etc.) and Internet service.
- Future DCA funding and funding levels will be based, in part, on HMIS participation. Considerations will include, but not limited to, level of use for each client, referrals for non-clients, transactions, ability to produce reports, data quality, etc.

DCA grantees should also refer to the Housing Support Standards regarding additional requirements regarding PATHWAYS COMPASS. Information regarding the HSS Standards can be found on the DCA website.

Each additional Continuum of Care may have a policy regarding HMIS implementation. Agencies should contact Continuum leadership regarding any Continuum specific requirements. If there are no specific Continuum Policy for their county and the agency is not a DCA grantee, the agency should follow general HUD guidelines on HMIS implementation which advise that agencies should enter universal and program data elements for at least 75% of the individuals that they serve.

Additional funders (e.g. United Way, Salvation Army, local Governments) may have additional requirements regarding the use of the Pathways System. Agencies should consult each of their funders to ensure they are aware of all relevant requirements.

Section A.6 Domestic Violence Agencies

According to the HUD Federal Register dated March 16, 2007 [FR-5056-N-01], agencies that are classified as Domestic Violence Agencies should not enter any identifying information into HMIS. Specifically, the register states:

“The new Confidentiality provision directs victim service providers not to disclose, for the purposes of HMIS, personally identifying information about any client. In accordance with this statutory requirement, victim service providers must maintain the confidentiality of personally identifying information of the providers’ clients.”

At this point in time, HUD has instructed Domestic Violence agencies not to use HMIS to enter any client level information, including non-identifying information.

Section B. Agency and User Setup

B.1 New Agency Procedures

Step 1. Sign Agency Agreements

1. Complete General Service Agreement Form
2. Complete Business Associate Addendum
3. Complete Exhibit A Pricing form
4. Complete Waiver Certification Form (if applicable)
5. Complete New Agency Form
6. Ensure system and equipment requirements are met
7. Complete Memorandum of Understanding (MOU) with Continuum and/or Funders if applicable.

All agency forms should be completed and returned to Tommy Phillips at Pathways Community Network, Inc. by fax or mail. Keep a copy of all documents for your files. Proceed to step two.

Step 2. Ensure Agency Meets Technical Requirements

Recommended Computer Specifications:

Processor:	300 MHz Processor PC
Operating System:	Windows 98 or above
Memory:	128 MB RAM
Browser:	Internet Explorer 5.0 or greater, Mozilla Firefox
Internet Access:	DSL or better

Agencies must also be able to meet applicable security requirements. Detail on security requirements can be found in section D.2 of this manual.

Step 3. Designate PATHWAYS COMPASS Agency Administrator.

This individual(s) will have the capability to configure the PATHWAYS COMPASS HMIS system to mirror the services the agency provides. The Administrator will be able to configure/update: Agency info, custom fields, Funds, Keywords, Programs, Program Profile, Reasons, Referrals, Services, Beds, Admissions, Homelessness, Sites, Assessments, Reservations and Users. This individual will also want to sign up for the Agency Administrator Training that is provided.

Step 4. Set up Programs and Complete Program Profiles

Each Agency will need to complete a Program Profile for each type of Service that is captured in the PATHWAYS COMPASS system. This profile will allow for better tracking of data and quality control, rendering more effective use of the system as well as quality data needed for HUD reporting.

Agencies should use the following guidelines when setting up programs in HMIS:

- All programs which provide shelter or housing must set up a program in the HMIS system.

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- Separate programs should be set up for emergency shelter, transitional housing, permanent supportive housing, overflow and winter shelter, and vouchers.
- Separate program should be set up for programs that cross multiple continuum of care. For example, if a program has beds or units in both Dekalb and Gwinnett County, they should set up two separate programs in HMIS – one for the beds in Dekalb County and one for the beds in Gwinnett County.
- If a program has separate beds or units in separate counties but within the same Continuum (i.e. Tri-J or Balance of State), they should contact their Continuum of Care Lead for guidance on whether or not they need to set up separate programs by county.
- Programs cannot be more than one type.
 - If services are provided as part of enrollment in a shelter or housing program, the agency does not have to set up a separate program for these services unless the agency chooses to do so.
- If a service program is required to produce an Annual Progress Report for HUD, they must set up a program in HMIS.

Instructions for Setting up Agency Sites and Programs in PATHWAYS COMPASS

Begin first by setting up Sites by clicking on Sites from My Agency Menu.

MAIN

- Search
- My Agency
- My Region
- I & R
- Reports
- Help
- Tutorial
- Switch User
- Log Out

MY AGENCY

- Info
- Fields
- Funds
- Keywords
- Profile
- Programs
- Reasons
- Referrals
- Services
- Beds
- Admissions
- Reservations
- Users
- Homelessness
- Sites
- Assessments

Agency Sites

Site Type: ☐ Admin ☐ Beds ☐ Services

Site Name: Default Site

Site Description:

Continuum of Care: Select

Scattered Site: ☐

Address 1:

Address 2:

City:

State: (None)

Zip:

Phone:

Hours:

Contact Name:

Contact Phone:

Contact Email:

Save Cancel

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For each Site you will need to complete the information where you see the headers in Bold. It is advantageous to capture as much information as possible.

Agency Sites

Site Type:	<input checked="" type="checkbox"/> Admin <input checked="" type="checkbox"/> Beds <input checked="" type="checkbox"/> Services
Site Name:	Default Site
Site Description:	
Continuum of Care:	GA-501 - Georgia Balance of State CoC
Scattered Site:	<input checked="" type="checkbox"/>
Address 1:	
Address 2:	
City:	
State:	(None)
Zip:	
Phone:	
Hours:	
Contact Name:	
Contact Phone:	
Contact Email:	

Save Cancel

If you have selected “Scattered Site” the screen below will appear. This should be completed for each scattered site for the agency.

Site:	Default Site
--------------	--------------

Address 1:	
Address 2:	
City:	
State:	(None)
Zip:	

Save Cancel

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Once you have entered information on all your sites, you will set up or update the Program Profiles. Click on Programs under the My Agency Menu. If there are existing Programs, they will appear here, otherwise you will only see the [New Link](#).

MAIN		Agency Program Maintenance				
Search My Agency My Region T & R Reports Help Tutorial Switch User Log Out						
MY AGENCY Info Fields Funds Keywords Profile Programs Reasons Referrals						
		New				
		Program Name	Program Type	Site	Expected Length(days)	Bed Program
		Emergency Shelter Program	Supportive Service Programs	HQ	30	Y
		Pathways Shelter	Emergency Shelter	HQ	13	Y
		Transitional Shelter	Permanent Supportive Housing	HQ	90	Y
		test	Prevention	HQ		N
		test4	Prevention	HQ		N

If this is the first time you are setting up the Program Profile or if it is a new Program, you will see the screen below. All Bolded fields require data input.

Agency Program Maintenance	
New Program	
Program Type	(Select) *
Program Name	
Program Description	
Expected Length(days)	
Bed Program	<input type="checkbox"/>
Site	None *
Funding Source:	<div> <div>Other</div> <div>Continuum of Care (HUD)</div> <div>DCA ESG</div> <div>DHR MHCAD</div> <div>DHR Family Violence</div> </div> <div> <div>10</div> <div>20</div> <div>30</div> <div>40</div> <div>50</div> </div>
Gender Served:	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE <input type="checkbox"/> TRANSGENDER
Household Type:	<div> <div>Unaccompanied Males > 18</div> <div>Unaccompanied Males < 18</div> <div>Unaccompanied Females > 18</div> <div>Unaccompanied Females < 18</div> <div>Families w/children headed by single male ad *</div> </div> <div> <div>10</div> <div>20</div> <div>30</div> <div>40</div> <div>50</div> </div>
Special Needs Served/Targeted:	<div> <div>Chronically Homeless (HUD Definition)</div> <div>Severely Mentally Ill</div> <div>Substance Abuse (Alcohol &/or Drugs)</div> <div>Persons with HIV/AIDS</div> <div>Other Disability</div> </div> <div> <div>10</div> <div>20</div> <div>30</div> <div>40</div> <div>50</div> </div>
<div>Save Cancel</div>	

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Select the Program Type that best matches the Program. Each program can be only one type.

Agency Program Maintenance

New Program	
Program Type	(Select) ▾
Program Name	(Select) ▾
Program Description	Emergency Shelter
Expected Length(days)	Overflow Shelter
Bed Program	Permanent Supportive Housing
Site	Prevention
Funding Source:	Transitional housing
	Voucher Assistance
	Winter/Seasonal Shelter
	Other
	Supportive Service Programs
	Other
	Continuum of Care (HUD)
	OCA ESG
	DHR MHDDAD
	DHR Family Violence
Gender Served:	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE <input type="checkbox"/> TRANSGENDER
Household Type:	Unaccompanied Males > 18
	Unaccompanied Males <18
	Unaccompanied Females > 18
	Unaccompanied Females < 18
	Families w/children headed by single male ad:
Special Needs Served/Targeted:	Chronically Homeless (HUD Definition)
	Severely Mentally Ill
	Substance Abuse (Alcohol &/or Drugs)
	Persons with HIV/AIDS
	Other Disability
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Once you save the general program profile data, you will see the program type questionnaire. For example, if Transitional Housing is selected the Program Type Questionnaire will appear. Based upon the Program Type the questions will be different.

Program Type Questionnaire

Transitional housing	
Questions	Answers
How many beds does this program have for unaccompanied individuals?	
How many UNITS (rooms/apartments) does this program have for families?	
How many BEDS does this program have for families within these units?	
Are the beds used for both individuals and families dependent upon need?	YES ▾
Does Capacity Fluctuate Throughout the Year?	Drastically ▾
On average, what % of your beds are occupied?	
What is the maximum amount of time individuals/families stay in these beds?	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Step 5. Designate who will be authorized system users and their access level

It should be determined who within the Agency will be utilizing the PATHWAYS COMPASS system. For each User, a User Access Checklist (UAC) will need to be completed. The UAC determines each Users access to the Client and Client Visit Menu, the Reports Menu, and the My Agency Menu.

B.2 New User Procedures

Once the agency administrator has designated a user access level and completed the User Access Checklist, the user must complete several key steps in order to gain access to the system.

1. Visit www.pcni.info/trainings to get a listing on the available Confidentiality & Ethics Trainings.
2. Sign up for and attend the Confidentiality & Ethics Training.
3. Sign the attendance roster and pass the Confidentiality & Ethics post test by 70%.

Step 1. Attend Confidentiality & Ethics Training

In order to obtain a PATHWAYS COMPASS User ID and password, each user will be required to pass the Confidentiality & Ethics with a score of 70% or above.

This training is offered monthly and the training schedule is posted on the www.pcni.info page, where you can also sign up electronically.

In extenuating circumstances a user needs to access the system prior to attending a Confidentiality & Ethics training. If a user needs access to the system before they are able to attend the C & E training, they can complete a user responsibility that can be obtained from the Support Team or can be accessed at www.pcni.or under Forms. However, this method should be the exception and not the rule.

Step 2. Obtaining a Password

Each PATHWAYS COMPASS system user is required to maintain a private password that allows them access to the system. This password is not to be shared with anyone. This password is initially set up when a system user completes the Confidentiality & Ethics Training with a passing score of 70%. Each subsequent year the system user is required to be recertified (attend another Confidentiality & Ethics Training).

Within 2-3 business days of completing C& E training, each new user should receive an email with their PATHWAYS COMPASS User Id and temporary password to activate their account. The account becomes activated once the User has logged in with their User Id and created a new password.

Step 3. Logging into PATHWAYS COMPASS

Once you have received via email your user id and temporary password, you have the information to now log in. If you do not receive this information via email, it may be one of the reasons listed below:

- An email address was not provided
- The email address provided may not have been legible
- The system may not have sent it as it should

In any event, if you have not received your login information after 3 days, please contact the Support Team.

If you have received the login information:

1. Go to www.pcni.info

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2. Go to the PATHWAYS COMPASS login link (located on the right hand side of the picture).
3. In the Instructions box there are three links.
 - a. If you are required to use a registered computer click here.
 - b. If you are not required to register a computer, click here.
 - c. If you need to download the Java Runtime download, click here.

If this is your first time logging on, you will need to click on the link for the Java Runtime environment download. Follow the prompts. Once you have downloaded the JRE download, you will need to go back to the Instruction box.

Logging on for a registered computer:

Once you are back at the Instruction box,

1. Click on the first link (If you are required to use a registered computer). The Java coffee like screen will appear. You will then see the login box.
2. Enter your User Id and temporary password you received or were given by the Support Team. The screen will say you are being redirected to a registered login.
3. Click Continue (if necessary) and another login screen will appear.
4. Enter your User Id and Temporary Password again. You will see a message saying your password has expired, please provide a new one. This new password should be 8 to 14 characters and must include at least 1 number. It cannot include your name or the name of your agency.
5. You should now see the Search Page. When you see this page, you have logged in successfully. You will need to remember your password, as Pathways does not store this information.

Logging into a non-registered computer:

In order to have the requirement removed, the Computer Registration Request must be completed and submitted to the Pathways Support/Training Coordinator. On that form a valid business reason must be included as part of your request. Ultimately, your CoC has the right to deny the request (See form in Appendix). If the Request has been granted:

1. Go to www.pcni.info
2. Go to the PATHWAYS COMPASS login link (located on the right hand side of the picture).
3. In the Instructions box, click on the second link (Not required to log in by a registered computer).
4. Enter your User Id and temporary password you received or were given by the Support Team. You will see a message saying your password has expired, please provide a new one. This new password should be 8 to 14 characters and must include at least 1 number. It cannot include your name or the name of your agency.
5. You should now see the Search Page. When you see this page, you have logged in successfully. You will need to remember your password, as Pathways does not store this information.

Step 4. Attend New User Training

Each authorized system user should attend a New User Training. In this training the user will learn what are the required HUD Data Elements, and how to: Sign on to the PATHWAYS COMPASS system, Navigate the pages within the system, Search for clients, Work with the Search Results, Verify and modify the authorization status of a client, Perform an Intake Process, Enroll and Discharge a client from a program. Additionally, the User will learn how to work with the following client information records: General, Household, Residential, Financial, Services and Program.

Section C. Data Entry and Data Quality

C.1 Release of Information Form (Client Authorization Form)

Prior to a client's data being entered into the PATHWAYS COMPASS system, every client must read, complete and sign a Client Authorization Form for each agency that provides services to them. The Client Authorization Form is available for download from the Reports Menu under "Lists". This form allows them to decide if they wish to have their information entered in to the HMIS database. If the client agrees to have their information entered into the system, they must sign the Client Authorization Form. This Client Authorization Form should reside in the clients file for future verification and auditing purposes.

A Client Authorization Form should be completed for all unaccompanied adults. The Parent/Guardian with minor children Authorization Form should be used by those parents/guardians with minor children.

If the client declines to have their information entered into the PATHWAYS COMPASS system, the client information should not be entered in to PATHWAYS COMPASS. The Client Authorization Form should reflect they declined and the form should be inserted into the client file for future verification and auditing purposes.

Client Opt-Out Form:

The client has the right to revoke their authorization at any time for any reason. If the client wishes to revoke the client authorization, an Opt-Out client form should be completed, signed and dated and inserted into the client file. Additionally, Authorization should be turned off within PATHWAYS COMPASS which now would deny any member within the agency to access that client file.

Client Authorization Expired:

The Agency Executive Director sets the time period in which a client can be seen by an agency before another authorization form is required to be completed again when the agency first signs up for PATHWAYS COMPASS. This duration can be updated at any time by the Executive Director. If the client authorization duration is not specified, by default the duration will be 1529 days before another authorization is required by a client. Once a client authorization is expired, the agency will have to obtain another signed authorization before they are able to enter additional information into the system.

C.2 Required Data Elements

The HUD Data and Technical Standards outline two categories of required data elements.

HUD Universal Data Elements:

The Universal Data Elements are to be collected from all clients served by all homeless assistance programs reporting to the HMIS. Universal data elements are needed for Continuums of Care (CoC) to understand the basic dynamics of homelessness in their communities and for HUD to meet Congressional direction to: develop unduplicated counts of homeless services

Georgia HMIS Standard Operating Procedures

users at the local level; describe their characteristics; and identify their use of homeless assistance and mainstream resources.

The Universal data elements are: Name, Social Security Number, Date of Birth, Ethnicity & Race, Gender, Veteran Status, Disabling Condition, Residence Prior to Program Entry, Zip Code of Last Permanent Address, Program Entry Date, and Program Exit Date.

The PATHWAYS COMPASS system automatically generates the unique person identification number, the program identification number and household identification number data elements.

HUD Program Level Data Elements:

Called Program-Specific Data Elements in the final Notice, are data elements that are required for programs receiving certain types of funding, but are optional for other programs. Most program specific data elements are for programs that receive funding under the McKinney-Vento Homeless Assistance Act and complete the Annual Progress Reports (APR's).

Program specific data elements must be collected from all clients served by programs that are required to report this information to HUD and other organizations. For programs with no such reporting requirements, these standards are optional but recommended since they allow local CoCs to obtain consistent information across a range of providers that can be used to plan service delivery, monitor the provision of services, and identify client outcomes.

For programs that receive funding through HUD's Supportive Housing Program, Shelter Plus Care, Section 8 Moderate Rehabilitation for Single Room Occupancy Opportunities for Persons with AIDS (HOPWA), most program specific data elements are required to complete the Annual Progress Report (APR) .

The program specific data elements that are required for HUD's current APR reporting include: Income and Sources, Non-Cash Benefits, Physical Disability, Developmental Disability, HIV/AIDS, Mental Health, Substance Abuse, Domestic Violence, Services Received, Destination and Reasons for leaving.

For more guidance on the HUD required data elements, see the Data and Technical Standards document available at <http://www.hmis.info/Resources/724/Data-Standards-Training-Module-1-Handout-HUD-Data-and-Technical-Standards.aspx> .

DCA Required Data Elements

DCA may request additional data elements. If you receive funding from DCA refer to section H.5, the DCA HMIS Policy and the Housing Support Standards for information about additional data element requirements.

Additional Continuum of Care Data Elements

Each Continuum of Care may have additional data element requirements. You will need to consult with your CoC to verify what additional data elements may be required.

Section H.3 lists the required data elements by program type as well as additional requirements by funder.

C.3 Client Intake, Program Enrollment and Program Discharge

Client Intake:

This is the process in which a client or potential client will go through a process where information is gathered and entered into the PATHWAYS COMPASS system. Each agency should gather the Universal Data Elements (see section C.2 for Universal Data Elements) and Program Level Data Elements (where required). Agencies can use their own in-house forms to gather the Universal Data and Program Level Data Elements or can follow the Sample Intake Form in the appendix. Client Intake includes entering new client data or updating information for a client that is already in the PATHWAYS COMPASS system. Care should be taken to make sure that the clients information is updated (such as homeless status, marital status, household, etc.) each time the client file is reviewed.

Program Enrollment:

The PATHWAYS COMPASS system includes a program enrollment wizard that allows the user to enroll a client in to one or more programs. The client remains in the program based upon the expected length of stay as determined by the agency administrator. This requires programs to be configured prior to enrolling a client into a program.

Required and Suggested Client Data Updates:

At every subsequent visit by a client, the universal data elements should be verified to ensure the latest information in the client record is complete. Refer to Section C.2 for the Universal Data Elements. Suggested updates that should also occur with each subsequent client visit should include: Income, Services Rendered, Housing Status/Residence, Household composition. While there are more suggested data elements, updating information on a client should occur as often as reasonably possible.

Program Discharge:

In order for a client to be discharged from a program, the client must first be enrolled in a program. Once the client has completed or the time has expired for the client to be in the program, such as Emergency Shelter or Transitional Housing, the client should be discharged from the program. Failure to discharge the client on a timely basis will skew the data and will impact the accuracy of reporting, such as the HUD APR Entry Report and the HUD APR Exit Report.

The PATHWAYS COMPASS system includes a discharge wizard which guides the user through the process of collecting HUD-required information when a client leaves a program. Refer to www.pcni.info for more guidance on discharging a client.

C.4 Timing of Data Entry

Each agency should follow the guidelines set forth by their respective Continua of Care relating to data entry timelines. However, whenever possible, it is best to input the data as soon as possible, in order to maintain the most current support being offered to a client.

For DCA and Balance of State Continuum of Care Grantees, data should be entered within one week of intake/enrollment. Clients should be discharged from the HMIS program within one week of their discharge.

When client information is entered, the dates entered for enrollment and discharge should be the ACTUAL dates that an individual entered or left the program, not the date of data entry/update.

C.5 Data Integrity and Quality

HMIS data quality refers to the ability of the data to accurately reflect the real world. Presenting accurate, consistent and timely information on homelessness, is critical in order to draw reasonable conclusions about the extent of homelessness and the impact of homeless services. Any Covered Homeless Organization to the extent possible should collect Protected Personal Information that is accurate, complete and timely.

Importance of Data Quality for HMIS Goals

The goals of HMIS on a national level were stated by Congress:

“There has never been an overall review or comprehensive analysis on the extent of homelessness or how to address it. The Committee believes that it is essential to develop an unduplicated count of homeless people, and an analysis of their patterns of use of assistance ...including how they enter and exit the homeless assistance system and the effectiveness of assistance.”

Thus, the 2001 Congressional directive targets information to understand:

- The extent of homelessness – By collecting personal information on all clients served, HUD hopes to generate an estimate of the unduplicated count of homeless people that access services nationally. Achievement of this goal depends on **high quality** personal identifying data, such as Social Security, names, gender, date of birth, which is used to create unduplicated counts.
- The nature of homelessness – Additional HMIS data elements focus on the characteristics of those engaged in homeless services. High quality data on gender, date of birth, race, ethnicity, veteran’s status and disability, and household composition are needed for this goal.
- Homeless service use patterns – Accurate program entry and exit dates and information on residence prior to program entry are critical in determining service use patterns that assess average length of stay and movement among different homeless programs. The collection of accurate identifying information at each program is also necessary in order to identify the extent to which clients appear in multiple programs, how clients move through the system, and to detect cycles of homelessness.
- The effectiveness of the homeless service system – Information at program exit, such as destination and income, are important to learn if and how the system has helped to resolve clients’ housing crisis and to improve their overall stability. Data on returning clients also contribute to this goal. Comparing program entry data with program exit data

at the aggregate level will also provide a picture of homeless program impacts on the clients they serve.

Improving data quality

- One of the most effective ways to collect quality data is to develop collection and data entry standards that are implemented by all agencies entering data into the PATHWAYS COMPASS HMIS system.
- There should be a shared understanding of purpose and process. Minimally, each staff member should have a document that outlines the data collection process and explains the importance of accurate data and maintaining data quality.
- Establish a Rapport with Consumers. Often people in a vulnerable position of being homeless may give incorrect information intentionally or unintentionally for a host of reasons. Inaccurate information can be minimized by establishing a rapport with the consumer.
- Paper forms should closely resemble the layout of the Intake screens within the PATHWAYS COMPASS system.
- Proofreading a hard copy of the data that has been entered.
- Emphasize and communicate any issues with data quality into already scheduled staff meetings.

Reducing Duplicates:

All efforts should be taken to ensure duplicate records are not created within the PATHWAYS COMPASS system. Conducting a thorough client search at Intake will help reduce the number of duplicates within the system. For further instructions on how to conduct a client search to avoid duplicates, refer to the PATHWAYS COMPASS User Guide or click on the Conducting a client search tutorial. If you do create a duplicate, please contact Pathways Support regarding ways to eliminate the duplicate.

Section D. Data Ownership, Security and Access

D.1 HMIS Privacy and Security Standards

HUD released HMIS Privacy and Security Standards in the Homeless Management Information System (HMIS) Data and Technical Standards Final Notice on July 30, 2004. The notice presents privacy and system security standards for providers, Continuums of Care and all other entities that use or process HMIS data.

You can access the Data and Technical Standards at:

<http://www.hmis.info/Resources/724/Data-Standards-Training-Module-1-Handout-HUD-Data-and-Technical-Standards.aspx>

You can also access the Frequently Asked Questions document developed by Abt at:

<http://www.hmis.info/Resources/726/Data-Standards-Training-Module-2-Handout-HMIS-Data-Standards-FAQ.aspx>

D.2 Pathways Privacy Policy

Pathways Community Network will not sell or rent personally identifiable information that we collect, and will not collect or share personally identifiable information from visitors or system users without first informing them that information will be collected, whether or not it could be shared, and with whom it might be shared. We will not share any individual's personally identifiable information without that individual's permission.

Log Files: We may use IP addresses to analyze trends, administer the site and gather broad demographic information for aggregate use. IP addresses are not linked to personally identifiable information.

Links: Pathways Community Network web sites contain links to other sites. Please be aware that Pathways is not responsible for the privacy practices of such other sites. We encourage our users to be aware when they leave our site, and to read the privacy statements of each and every web site that collects personally identifiable information. This privacy statement applies solely to information collected by Pathways Community Network's web sites.

News Service: If a user wishes to subscribe to our news service, we require contact information such as name and email address.

Surveys: From time-to-time our site requests information from users via surveys. Participation in these surveys is completely voluntary and the user therefore has a choice whether or not to disclose this information. Information requested may include contact information (such as name and address), and demographic information (such as zip code, age level). Survey information will be used for purposes of monitoring or improving the use and satisfaction of Pathways Community Network's services.

Security: Pathways Community Network takes every precaution to protect the information of people who use our services. When you submit sensitive information via a Pathways website, your information is protected both online and off-line. When our case management system users

are asked to enter sensitive information (such as a social security number) the information is encrypted. While on a secure page, the lock icon on the bottom of web browsers such as Mozilla Firefox and Microsoft Internet Explorer becomes locked, as opposed to un- locked, or open, when you are just ‘surfing’. While we use SSL encryption to protect sensitive information online, we also do everything in our power to protect user-information off-line. All of our users’ information, not just the sensitive information mentioned above, is restricted in our offices. Only employees who need the information to perform a specific job (for example, a technical support representative) are granted access to personally identifiable information. Furthermore, ALL employees are kept up-to-date on our security and privacy practices. Every quarter, as well as any time new policies are added, our employees are notified and/or reminded about the importance we place on privacy, and what they can do to ensure our customers’ information is protected. Finally, the servers that we store personally identifiable information on are kept in a secure environment, in a locked data center.

D.3 Security Policy

Pathways Community Network places highest priority on the security of its systems, and the private information they contain. Pathways, its staff and volunteers continually work to protect data and systems:

1. Confidentiality. Access to client information must be tightly controlled and people with access to confidential information must understand their personal responsibility to maintain its confidentiality.
2. Integrity. Client information must be protected so that it cannot be modified while in transit or storage. Reported data must be accurate.
3. Availability. Systems must be available to users when and where they need them.

If an employee leaves your agency, inform Pathways as soon as possible so that their account can be deactivated.

Information Security Procedures:

All Pathways Community Network employees and volunteers are responsible for protecting the confidentiality and security of Pathways data systems and the human services client information they contain. Information concerning the security related tasks an employee is responsible for are included in the employee’s job description. The agency is responsible for ensuring that information that is printed from the PATHWAYS COMPASS is also kept confidential, private and secure.

D.4 Client Grievances

If a client has a grievance regarding erroneous data entry or inappropriate use of their data, they will need to follow the agency’s established guidelines, standard operating procedures or protocol on resolving these issues.

D.5 HIPAA

Pathways Community Network consulted with HIPAA experts at Price Waterhouse Coopers to ensure that its privacy and security features meet or exceed requirements of the Health Information Portability and Accountability Act (HIPAA). PATHWAYS COMPASS was one of the first such systems in the country to fully comply with HIPAA.

D.6 Access to Data

Data Sharing

The Pathways HMIS gives individual clients complete control over which agencies can view their information. At point of service the client may authorize an agency to access existing information in the HMIS, and to add information about the client to the HMIS. When the client approaches another organization, the authorization process is repeated. This ensures that no agency accesses a client's record without that client's specific permission, and it significantly increases client confidence in the HMIS.

The PATHWAYS COMPASS system allows for data sharing across agencies, but also has security measures that help to limit data access across agencies.

Color coding within PATHWAYS COMPASS application:

Dark Blue Areas: Information accessible for all agencies.

Teal Areas: Information only accessible by the recording agency.

Red Areas: Information only accessible by the User entering the data within the agency.

Revoking Authorization:

The client has the right to revoke their authorization at any time for any reason. If the client wishes to revoke the client authorization, an Opt-Out client form should be completed, signed and dated and inserted into the client file. Additionally, Authorization should be turned off within PATHWAYS COMPASS which now would deny any member within the agency to access that client file.

Unauthorized Access to the PATHWAYS COMPASS system:

Any user accessing the PATHWAYS COMPASS system must be affiliated with an active member agency. Additionally, each system user must attend the required Confidentiality & Ethics Training or have completed a User Responsibility Form in order to be given a User Id and Password. Unauthorized access is prohibited and are grounds for legal action.

Section E. Reporting

E.1 Overview of Available Reports

PATHWAYS COMPASS has an abundance of standard reports that can be accessed by any user that has access rights. For detailed information about Reporting, refer to the Reports User Guide available at www.pcni.info. Reports are divided by the category that they most apply to, as listed below:

List Reports

Agencies By Code
Member Agencies

Blank Forms

Blank Authorization Form
Opt-Out Authorization Form
Privacy Practice Certification Form (Phone Authorization)

Summary Reports

Authorizations:

Alerts for Currently Authorized Clients
Authorizations Received
Residence Record Alerts for Currently Authorized Clients

Custom Fields:

Activity by Value (Custom Field n)

Program:

Current Roster
Program Follow Up/Outcomes

Service Records:

Services by Date
Services by Client Keyword
Services by Need, Outcome
Services by Outcome, Need
Services by Zip Code, Outcome

Fund Reports:

Disbursements by Fund
Disbursements by Need

Agency

Agency customized reports (if applicable)

Statistical Reports

CDBG:

CDBG Monthly Services
CDBG Services Beneficiaries

Custom Fields:

Demographics –Households (Custom Fields)
Demographics –Individuals (Custom Fields)

Disbursements:

Demographics- Household (Disbursements)
Demographics – Individual (Disbursements)

ESGP:

ESGP Beneficiaries

HUD APR Format:

Program Entry and Occupancy
Program Exit
HUD HOPWA APR

Service Records:

Demographics –Households (Service Records)
Demographics – Individuals (Service Records)
Demographics – Individuals by Household Type (Service Records)
Incoming Referral Sources
Outgoing Referral Status

Data Exports

Client Information:

Client Demographic – Export

Custom Information:

Custom Information – Export

Goals Information:

Goals Information – Export

Program Information:

Program Enrollment and Discharge Information – Export
Program Follow Up Information – Export

Services Information:

Services Information - Export

E.2 List Reports

Agencies By Code – Displays agency by Code, agency Name, and Pathways membership status in your region.

Member Agencies-Displays name of each Pathways member agency in your region.

E.3 Blank Forms

Blank Authorization Form – This report shows the Pathways Community Network Client Authorization Form with only the name of your agency filled in.

Opt-Out Authorization Form – This report show the Pathways Community Network client Opt-Out form with only the name of the agency filled in.

Privacy Practice Certification Form – This report shows the Pathways Community Network Notice of Privacy Practices Certification with only the name of your agency filled in.

E.4 Summary Reports

Authorizations:

Alerts for Currently Authorized Clients-Shows the client key, the identification of the PATHWAYS COMPASS User who recorded the authorization, and an Alert Description for all currently authorized clients for whom an alert exists.

Authorizations Received- Shows the New Authorization Date, Name, Client Key, and Authorization Expiration Date for all counted clients, grouped by the name of the PATHWAYS COMPASS User who recorded the authorization.

Residence Record Alerts for Currently Authorized Clients-Shows the Client Key, the Identification of the PATHWAYS COMPASS User who recorded the authorization, and an Alert Description for all currently authorized clients for whom an alert exists.

Custom Fields:

Activity by Value (Custom Field n) – List the Custom Fields page transaction dated within the reporting period, grouped by the values in the selected configurable field. A duplicated and unduplicated count of the number of transactions for each group is displayed, followed by the transaction details.

Program:

Current Roster – The report lists clients that have been enrolled and not yet discharged. The number of clients enrolled is shown. If the program has an expected length of stay, the number of days left before the period expires is shown. If the program is associated with bed records, bed information is shown.

Program Follow Up/Outcomes – This report lists all follow ups that are due or past due during the reporting period. In addition, outcomes are listed for all follow ups that occurred during the reporting period. Follow-ups are grouped by the Follow Up Interval, defined as the number of days since program discharge.

Service Records:

Services by Date -This report lists clients that have transactions recorded on the Client Services Information page and dated within the reporting period. The records are in date order.

Services by Client Keyword –This report summarizes and lists transactions recorded on the Client Services Information page and dated within the reporting period. The clients are grouped by the value in the Keyword field of the Client General Information page.

Services by Need, Outcome – The report lists all transactions recorded on the Client Services Information page dated within the reporting period. The first section shows the number of transactions and the number of unduplicated clients for each Need-Outcome combination. The second section is a detailed list of each transaction.

Services by Outcome, Need – The report lists all transactions recorded on the Client Services Information page dated within the reporting period. The first section shows the number of transactions and the number of unduplicated clients for each Need-Outcome combination. The second section is a detailed list of each transaction.

Services by Zip Code, Outcome – The report lists all transactions recorded on the Client Services Information page dated within the reporting period. The first section shows the number of transactions and the number of unduplicated clients for each Zip Code-Outcome combination. The second is detailed list of each transaction.

Fund Reports:

Disbursements by Fund – The report lists the disbursement transactions dated within the reporting period, grouped by the Fund Resource associated with each transaction. The total Amount Requested and Amount Disbursed plus a transaction count is included for each fund.

Disbursements by Need – The report lists the disbursement transactions dated within the reporting period, grouped by the need associated with each transaction. The total Amount Requested and Amount Disbursed plus a transaction count is included for each fund.

E.5 Statistical Reports

CDBG:

CDBG Monthly Services – The report shows demographic information for individuals served during the reporting period for the first time since the start of the program period. These people are often referred to as “New Persons Served This Month”.

CDBG Services Beneficiaries – The first section of the report shows the number of clients served during each month of the reporting period. The clients are shown by race and ethnicity. The second section includes the count of all household members. The third section show the number of female-headed households served. The fourth section shows the code numbers used in the first two sections to indicate race.

Custom Fields:

Demographics –Households (Custom Fields) – This report shows demographics for counted household types, including age range and gender. The count is unduplicated.

Demographics –Individuals (Custom Fields) – This report shows demographics for counted individuals. The count is unduplicated

Disbursements:

Demographics- Household (Disbursements) – This report shows demographics for counted households, including age range and gender. The count is unduplicated.

Demographics – Individual (Disbursements) - This report shows demographics for counted individuals. The count is unduplicated

ESGP:

ESGP Beneficiaries - This report shows demographics for counted individuals. The count is unduplicated.

HUD APR Format:

Program Entry and Occupancy – The report shows demographics for clients who have entered into your agency’s program within the reporting period. For some sections of the report, only program participants are counted. The report also shows the average daily occupancy for the program.

Program Exit – This report shows demographics for clients who have been discharged from your agency’s program within the reporting period. For some section of the report, only program participants are counted.

HUD HOPWA APR – This report shows demographics for clients who were present in your agency’s program at any point in the time within the reporting period. For some sections of the report, only eligible individuals are counted. In other section program beneficiaries are counted. In another section, HOPWA funds expended by the project are shown, including the Needs associated with the expended funds and the number of households receiving the funds.

Service Records:

Demographics –Households (Service Records) – This report shows demographics for counted household types, including age range and gender. The count is unduplicated.

Demographics – Individuals (Service Records) - This report shows demographics for counted individuals. The count is unduplicated.

Demographics – Individuals by Household Type (Service Records) – This report will show the count, age range, and gender of individuals in each household type. The count is unduplicated.

Incoming Referral Sources – This report shows the count of incoming referrals from each Referral Source agency during the reporting period.

Outgoing Referral Status – this report shows the number of referrals for each Target Agency, Need, and Referral Status. The report separates referrals where the Target Agency has updated the Referral Status from those where the Target Agency has not done so.

E.6 Data Exports

Client Information

Client Demographic – Export – The first row contains the field names. After that, one row is exported for each client receiving at least one Service record dated within the reporting period, plus one row for each member of their household.

Custom Information:

Custom Information – Export – The first row contains the field names. After that fields are exported for each Custom Field record with a Date within the reporting period. Field Names include: Client Key, Household Key, Contact Date, Field 1 through Field 6, and Notes.

Goals Information:

Goals Information – Export – The first row contains the field names. The fields are exported for each Client Goals record with a Date Set within the reporting period. Fields exported include: Client Key, Household Key, Goal, Date Set, Date Achieved, and Agency Only

Program Information:

Program Enrollment and Discharge Information – Export – The first row contains the field names. The fields are exported for each Client Programs record with a Program Entry Date within the reporting period. Fields exported include: Client Key, Household Key, Program Name, Entry Date, Exit Date, Destination, Reason for Leaving, Tenure and Subsidy.

Program Follow Up Information – Export - The first row contains the field names. The fields are exported for each Follow up record with a Follow up Date within the reporting period. Fields exported include: Client Key, Program Key, Program Name, Follow up Date, and Outcome.

Services Information:

Services Information – Export - The first row contains the field names. The fields are exported for each Services Information record with a Service Date within the reporting period. Fields exported include: Client key, Household Key, Service Date, Need, Outcome, Checkbox, and Note.

For more information on reports available in PATHWAYS COMPASS, please refer to the Reports Guide available at www.pcni.info.

E.7 Running your APR Entry Report

For agencies that receive McKinney Vento funding and are required to run a HUD APR, the following information must be captured in the PATHWAYS COMPASS system. Access to the Client Menu and the Reports Menu are required.

Data entry requirements for the HUD APR Report:

1. At least one member of the household must be enrolled in the program, either before or during the reporting period.
 2. All household members must be entered in the system with the correct Date of Birth, Gender, Race, Ethnicity, Veteran status, Disabled status, and Special Needs status. They must be grouped together in a single PATHWAYS COMPASS Household List.
 3. Homeless, Chronically Homeless, and Prior Night's Residence status must be entered with a transaction or entry date within the reporting period. If multiple statuses exist within the period, the earliest one is used. For more information, see the section How are "Transaction" and "Entry" Dates Determined in the Reports User Guide.
1. From the Main menu, choose Reports.
 2. From the Reports menu, choose the Statistical Reports Category.
 3. From the Statistical Reports Category, choose the Program Entry Report (HUD APR Format).
 4. Select the .pdf format.
 5. Enter the beginning date for the first day you are wanting to include in the report.
 6. Enter the ending date for the last day you are wanting to include in the report.
 7. Select the Program Name

E. 8 Export Function

The PATHWAYS COMPASS Data Export feature creates a CSV format data file containing information about client demographics and transactions. Such a file can then be downloaded to your local computer and imported into a spreadsheet or database application. Once the information is in your local application, it can be processed, viewed, printed, etc. according to the needs of your agency.

Comma Separated Values (CSV) is a format for a data file that is commonly used to transfer information from one computer system to another. Practically every major spreadsheet and database application can import and work with data that is formatted this way. Examples of such applications include Microsoft Excel, IBM Lotus 1-2-3, OpenOffice.org Calc, Microsoft Access, OpenOffice.org Base, and many others.

PATHWAYS COMPASS can create several different CSV data files, containing different information. For a description of these files and the menu commands and parameters needed to create them, see the section Data Exports in the Reports Guide.

E.9 Filter Reports

Pathways has incorporated into the Statistical Standard Reports the ability to filter a report by Need Code, Outcome, Homeless Status, Chronically Homeless Status, Referral Status, Disbursement, Reservation and Area (by County, City or Zip Code).

E.10 Regional and Continuum Reports

Pathways aggregate Reporting serves as the basis for Reporting and Monitoring Tools available for Region level/CoC level representatives. These reports serve to give insight on activity/system utilization, trends, potential problems. These reports include:

- Agency/Program Keys
- Authorization Activity
- Demographics – Individual
- Demographics – Household
- HMIS Compliance
- Program Entry HUD APR
- Program Exit HUD APR
- Service Visit Activity
- Usage Trends Report

Additional reports at the Regional and Continuum Level are currently under development.

E.11 Oracle Discoverer

This ad hoc reporting tool allows for additional manipulation of data fields. Users have the ability (based upon business views) to manipulate formatting, creating graphs, analyze data via pivot tables, use drilling, parameters, conditions, totals, percentages, calculations, sorting data, sharing and printing reports. There is an additional charge for the Oracle Software. Please contact a Pathways representative to find out more about Oracle Discoverer.

Section F. System Support, Training and Technical Assistance

F.1 Reporting System Issues

Pathways provides several ways in which to report system outage, problems, or questions. Users can communicate with the Support Team by:

Email: support@pcni.org

Phone: 404-639-9933 ext. 308 (local)

Phone: 866-818-1032 ext. 308 (toll free)

System Errors - General Guidelines

Any system error reports, system outages, enhancement request should be submitted by one of three methods: a) email; b) the error reporting feature within the system; or c) via fax to the Support Team. If request or system problems are submitted to other internal staff members this information should be forwarded to the Support Team. In which case, any problem or request should be entered into the Salesforce CRM. It is also encouraged that the message be relayed that Phone request are discouraged as it does not provide adequate documentation of who, when, where, what and other specifics that are needed to maintain an accurate listing of all support queues.

Minor quick system errors:

System errors that are reported to Support are tested to confirm it in fact is a system error.
The error is discussed with the Development Team for a timeline for completion
The Development Team fixes and then sends to QA for testing
Client is notified.

Major system errors:

System errors that are reported to Support are tested to confirm it in fact is a system error.
The error is discussed with the Development Team for a timeline for completion
A timeline estimate indicates this is not a quick fix....
A resource is assigned to work on the error.
The Development Team interacts with Support to ensure the details are correct
The Development Team fixes and then sends to QA for testing
Client is notified.

F.2 Requesting Enhancements

An enhancement to the system includes an additional data element, report, or function that was not previously in the system. Enhancements do not include fixing an existing function of the system. System errors should be communicated directly to Pathways Support. If Pathways Support determines the request is an enhancement rather than a System Error, they will communicate this to the requestor who should then follow enhancement request protocol.

If an agency would like to request an enhancement to the system, they should communicate this request to their continuum of care representative directly or through the advisory/user group.

If a continuum of care representative has a request for an enhancement they should communicate this request to the DCA HMIS Project Manager. The project manager will then compile all requested enhancements for discussion at the steering committee meeting. All GA HMIS enhancements will be approved by the steering committee and/or project manager before placement in the GA HMIS development pipeline. If an agency or continuum of care has an enhancement request that they need immediately, they may contact Pathways for information about how to purchase an enhancement outside of the GA HMIS project.

The HMIS Enhancement Request Form can be downloaded from the DCA website.

F.3 Required and Optional Training

Confidentiality & Ethics Training (Required)

Upon completion of this course, you will be able to:

Explain what guides a Human Services Professional, explain the HIPAA Federal Mandates, explain State of Georgia Reporting Requirements, and additional mandated reporting requirements.

Prerequisites: The ability to use a computer, including the use of a mouse and keyboard and a basic understanding of the Windows operating system. The ability to navigate the Internet, including the use of a browser and the ability to recognize and choose a link.

New Users Training (Required)

Upon completion of this course, you will be able to:

Process and Update a client record, which may include:

Conduct a client search, working with the General Page, residence page, household page, income page, service page, client enrollment and discharge from a program(s)

Prerequisites: Have basic computer knowledge (familiarity with mouse and keyboard), accessing and navigating on the Internet including the use of a browser and the ability to recognize and choose a link. The user must have access rights to Client Menu.

Reports Training

Upon completion of this course, you will be able to:

Identify the category and the reports that are under each category

Describe what data drives what reports

Run a report, including: Enter parameters, display a pdf report, use Adobe Acrobat Reader to view the report online, and print a report

Prerequisites: User must take Confidentiality & Ethics, New Users Training, and must have access to Reports Menu.

Agency Administration Training (Required for Agency Administrators Only)

Upon completion of this training, you will be able to:

Demonstrate how to update the Agency Info page, create a Preferred Services list, add/edit/delete Users and Access levels, Custom fields, Keywords, Fields, Funds, and Program

Prerequisites:

User must have complete Confidentiality & Ethics, New User Training, Reports Training and must be given Agency Menu access rights by the Supervisor or Executive Director.

HMIS Administrator Training

Upon completion of this training, you will be able to:

Demonstrate how to create a new agency, update the Agency Info page, create a Preferred Services list, add/edit/delete Users and Access levels, Custom fields, Keywords, Fields, Funds, and Program. Run various reports on behalf of the CoC.

Prerequisites:

Each HMIS Admin must have completed Confidentiality & Ethics, New User Training, Reports Training and Agency Administration Training. A HMIS Administrator is chosen by each CoC and then given Agency level access rights & Roles and Responsibilities are defined by the Continuum of Care.

Pathways Training Locations:

Pathways provides training via classroom, web cast and on-site. All Pathways training, locations, dates and times are listed on www.pcni.info/training. Each user can register for the training most conducive to their learning style.

F.4 Technical Assistance Available

Technical Assistance Prerequisites:

1. Attend Confidentiality & Ethics training, pass with 70% or greater
2. Attend User Training
3. Attend Reports Training
4. Attend Agency Administration Training (where applicable)
5. Complete Pre-Onsite Assessment Form and submit to Support Team
6. Entering data into PATHWAYS COMPASS system
7. Sign off of visit with Executive Director
8. Basic knowledge of computer, use of browser, and mouse, navigate to various pages.

Technical Assistance Process:

The Technical Assistance/Training Specialist will work with an Agency to help them achieve HMIS compliance on the PATHWAYS COMPASS system. Each visit will require the proper personnel to be in attendance. The outline below will serve as a standard. Additional assistance needed, will be evaluated on a case by case basis.

Technical Assistance/Training Specialist Visit 1:

Who should attend: Agency PATHWAYS COMPASS Admin

What Pathways will do:

This visit the TA will emphasize bed enrollments and discharges that impact the HUD Annual Progress Report (if applicable) and the Annual Homeless Assessment Report (AHAR) Reports.

Part I:

- Look at the logistical flow of data within the agency
- Identify who performs what functions in the agency
- Determine ways to integrate or streamline the workflow
- Configure the Pathways system based upon funding requirements
- Configure all areas of the system to maximize data collection, which includes configuring (if applicable):
 - Preferred Services
 - Bed Program
 - Service Programs
 - Custom Fields
 - Keywords
 - Reasons
 - Follow Ups/Outcomes
 - Keywords

What your agency must do (this must be done prior to the second TA visit):

- Enter all service transactions for clients
- Enroll and discharge clients from Programs (where applicable)
- Enter or update HUD Data elements for each client (as necessary)

Technical Assistance/Training Specialist Visit II:

Who should attend: Agency Admin for PATHWAYS COMPASS and others using PATHWAYS COMPASS system

What Pathways will do:

- Review prior visit configuration settings, etc
- Address concerns from prior visits
- Discuss Reporting

What your agency must do:

- Continue to enter service transactions for each client
- Continue to enroll clients in a Program(s) or discharge a client from a Program
- Continue to enter or update HUD Data elements for each client (as necessary)

F.5 Online Resources

The following online documents can be found at www.pcni.info under Forms, Documents and Videos:

User Access Checklist

User Responsibility Statement

General Service Agreement - *The main agreement between your organization and Pathways*

Business Associate Addendum - *A data sharing agreement required under the federal Health Insurance Portability and Accountability Act (HIPAA)*

Business Associate Requirement Waiver Form - *For organizations not required to comply with HIPAA regulations*

New Agency Form - *Complete this form and send it to the Pathways Support Team so they can create or update your organization's system accounts.*

Referral Only Agency Form - *Complete this form and send it to the Pathways Support Team so they can add to a list of agencies that your agency can use to record client referrals. This form is not required.*

Oracle BI Discoverer Viewer users guide - *The complete Oracle Discoverer Viewer manual, which explains how to use all features of this user friendly reporting tool.*

Oracle BI Discoverer Plus users guide - *This manual describes how to use all features and functions of the powerful Oracle BI Discoverer Plus custom reporting system.*

PATHWAYS COMPASS Quick Reference Card - *The QRC contains information such as how to log into the PATHWAYS COMPASS system, check training class schedules and enroll online, and contact the Support Team.*

PATHWAYS COMPASS User Guide - *Step-by-step procedures for all of the end-user PATHWAYS COMPASS system functions, including logging in, searching, intake, building households, program enrollment and discharge, and recording services. This edition adds documentation for the new "Homeless Information Optional" feature, and includes the Error Reporting feature, Registered Computer login, Streamlined Intake, Program Enrollment from the Services pages, and more.*

HUD Data Elements Guide - *This three-page job aid describes the data elements required in the COMPASS HMIS for the HUD Annual Progress Report (APR) and gives instructions on entering them and running the PATHWAYS COMPASS reports that relate to the APR.*

PATHWAYS COMPASS Reports User Guide - *How to display and print reports, plus a complete description of all the standard reports that come with the system. This edition supports the new Data Export feature.*

PATHWAYS COMPASS Administration Guide - *The procedures needed to create and maintain information about your agency's profile, display information, programs, funds, end-users, and more!*

In addition, Quick Reference "How To" Guides available at www.pcni.info under Forms, Documents and Videos on the following topics:

Program & Service: *This Quick Reference Guide contains instructions to: a) enroll a client in a program and record a service for that client in one transaction; b) discharge a client from one or more programs.*

Sample Client Intake Guide: *This sample form can be used as a starting point for agencies to use when creating their own Client Intake form. Download this guide and then modify it to suit your needs.*

PATHWAYS COMPASS Quick Reference Card: *The QRC contains information such as how to log into the PATHWAYS COMPASS system, check training class schedules, and contact the Support Team.*

The following Tutorials are available at www.pcni.info under Forms, Documents and Videos:

Client Search - a demonstration of how to use the PATHWAYS COMPASS system to search for people who have received services in your community

Program Enrollment - learn how to enroll a client in a program and record a service for that client in one transaction

Program Discharge - a demonstration of how to discharge a client from one or more programs

F.6 Accessing Training and Technical Assistance

To assess the various trainings for HMIS, visit www.pcni.info and select Training Schedule.

You can register online, by email at support@pcni.org or by phone at: 404-866-1032 ext. 308 or toll free at 866-818-1032 ext. 308

For more information on requesting a TA, contact the Support Team at support@pcni.org or by phone at 404-639-9933 ext. 308 or toll free at 866-818-1032 ext. 308.

Section G. Management Reports and Monitoring

G.1 Management Reports

Pathways will provide Continuum of Care leads with information necessary to monitor HMIS utilization by agencies and by the Continuum as a whole. Additional Continuum and Jurisdictional reports are currently under development.

G.2 Monitoring

Each continuum of care or funder may have individual monitoring procedures. For specific information on monitoring, agencies should contact their funder or continuum of care representative.

If your agency receives DCA funding, HMIS utilization and adherence to DCA's HMIS Policy is a component of the standard monitoring procedures. For more information about the DCA HMIS Monitoring, contact Lindsey Stillman (lstillma@dca.state.ga.us)

Security Audits will be conducted periodically by Pathways Staff in pursuant to the baseline standards defined in the HUD Federal Register pages 45932-45933. These Security Audits will focus on the following areas:

Physical Access to Systems with Access to HMIS Data

Disaster Protection and Recovery

Disposal

System Monitoring

User Authentication

Electronic Data Submission

Electronic Data Storage

Security

Privacy Standards

Contact Pathways Support for a template of the Pathways Agency's Security and Privacy Policy Audit.

Section H. Appendices

H.1 Troubleshooting

Frequently asked questions

Q: Why does my account become inactivated?

A: Your account can go inactive for two reasons:

- 1) When your account is initially activated, if you do not log in by midnight on that same day your account will automatically revert to an inactive status, and
- 2) If you have not logged in to the PATHWAYS COMPASS system for 90 days, your account will automatically revert to an inactive status.

Q: When does my password expire?

A: You must change your password every sixty days. You will be prompted at the end of that period to change your password. The new password must be between 8-14 characters long and must include at least one number.

Q: Clients sleep overnight at my agency. Must I always record my agency's bed information (like the type of beds and their locations) in PATHWAYS COMPASS?

A: No. However, you should have a PATHWAYS COMPASS program set up if your agency operates any type of overnight shelter program, such as Emergency Shelter, Transitional Housing, Seasonal Beds and Shelter + Care beds. Then you should enroll and discharge your clients in that PATHWAYS COMPASS program.

Q: How do I avoid putting in duplicate records?

- A:
- 1) Try to obtain verifiable documents when there is uncertainty as to how a name is spelled, what name the client is using, or the social security number.
 - 2) Make sure you conduct a thorough search to be sure the client does not already exist in the PATHWAYS COMPASS system.
 - 3) If, when doing an Intake for a new client, the system tells you that there is already a client with the same ID in the system, CANCEL the Intake process, return to the Client Search page, and look up the existing client.

Q: How do I get a User ID to get on the PATHWAYS COMPASS system?

A: Each user is required to attend a Confidentiality & Ethics Training class and put their name on the sign-in roster. The information on the roster is used to create or update a User's account.

Q: Can I share my User ID and Password with another co-worker if they haven't been able to attend Confidentiality & Ethics to get their own?

A: No. The co-worker can complete a User Responsibility Statement form to get an account immediately. Then they will need to attend a Confidentiality & Ethics Training class as soon as possible.

Q: Do I need to enter a Service transaction for every client?

A: You should try to enter a Service transaction for every interaction you have with a client. This includes providing bus passes, money, case management, clothing, and food. Doing so provides a more accurate picture as to the volume and the specific services an agency

is providing. In addition, some reports are run based on service transactions (for more detail see Reports Section)

Tips and Troubleshooting

- Since the PATHWAYS COMPASS system logs out after 20 minutes, when entering case notes on a client use a word processing application to enter all the information, do a spell check and then cut and paste to the client record within PATHWAYS COMPASS.
- If you are setting up your Preferred Services and the changes you make don't display when you Save, refresh the page before you try to enter the service again.
- If you click on the purple error report button, to expedite the troubleshooting process, be sure to include the page you were on *before* the error occurred, what you were trying to do, the client key (if applicable) and any details that may be helpful in duplicating the error.
- If your PATHWAYS COMPASS responsibilities have expanded or you need to increase your computer access, you should update the User Access Checklist Form by downloading the form from our website at www.pcni.info click on User Forms and Documents, complete and fax to the Support Team.
- If after three attempts to log in to PATHWAYS COMPASS you will get a message to contact the Support Team. You can close the current browser page and then open a new page and you will have three additional attempts to log in. If you are still not able to log in, contact the Support Team.
- You can download User Training, Agency Admin, and Reports Training manuals from www.pcni.info and click on User Forms and Documents.

H.2 WHO SHOULD I CONTACT?

Problem/Question	Contact Person
Problem with computer or internet connection	The IT person at your agency
Problem with logging onto Pathways or a problem using Pathways	Pathways Support (support@pcni.org) 404-639-9933 (308) – Local 866-8181032 (308) – Toll Free
Error while you are using Pathways	Press the purple “Submit Error Button” at the bottom right in Compass or contact Pathways Support
Questions about Training or Technical Assistance Available	Pathways Support or www.pcni.info
Information about User Group Meetings	Local Continuum of Care Representative
Requests for Enhancements to Pathways	Local Continuum of Care Representative
Questions about Local Continuum Policies	Local Continuum of Care Representative
Questions about DCA HMIS Policy	Lindsey Stillman (lstillma@dca.state.ga.us) 404-327-6813

Continuum of Care Representatives

Athens/Clarke – Evan Mills

Augusta/Richmond – Vicki Johnson (vjohnson@augustaga.gov), 706-821-1797

Augusta HMIS Administrator – Henry Holt (hholt@augustaga.gov), 706-821-1797

Cobb County – Bill Hanson (bhanson53@hotmail.com), 770-528-4640

Cobb HMIS Administrator – Joan Toder (jtoder@hotmail.com)

Columbus/Muscogee – Liz Dillard – (liz@homelessresourcenetwork.org), 706-571-3399

Atlanta/Fulton/Dekalb – Tommie Jones – (tommie.jones@co.fulton.ga.us), 404-730-7476

Melvia Richards – (mwrichards@co.dekalb.ga.us), 404-286-6633

LaTrice Johnson – (ldjohnson@atlantaga.gov), 404-817-6704

Savannah/Chatham – Mark Baggett – (mbaggett@homelessauthority.org), 912-790-3400

Balance of State (all other counties) – Lindsey Stillman (lstillma@dca.state.ga.us), 404-327-6813

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS PERMANENT SUPPORTED HOUSING

General Requirements

- A program should be set up for each separate Permanent Supported Housing project. Program profile data should be completed.
- At intake, all universal data elements should be completed
Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status; Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry; Zip Code of Last Permanent Address
- At intake and discharge, all program data elements should be completed
Program Entry Date; Program Exit Date; Income at Entry and Exit; Income Sources at Entry and Exit; Services Received; Destination; Reasons for Leaving
- All individuals should be enrolled in the appropriate program on the date that they entered the program. If data is not entered on the same day, back date the program entry date.
- All individuals should be discharged on the date that they leave the program. If the data is not entered on the same day, back date the program exit date.

Additional DCA Grantee Requirements

- Upon intake, a “Barriers to Housing Stability” assessment should be completed
- Upon intake, at least one housing goal or goal directly related to housing stability should be set for the individual
- Housing Status, Employment Status and Benefits Status should be updated upon program entry, program exit, and 30, 90 and 180 days after program exit

Other Requirements

- If an agency wishes to run an ESGP report on their program, they must enter at least one service transaction for each individual they are serving

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS TRANSITIONAL HOUSING

General Requirements

- A program should be set up for each separate Transitional Housing program. Program profile data should be completed.
- At intake, all universal data elements should be completed
Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status; Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry; Zip Code of Last Permanent Address
- At intake and discharge program data elements should be completed
Program Entry Date; Program Exit Date; Income at Entry and Exit; Income Sources at Entry and Exit; Services Received; Destination; Reasons for Leaving
- All individuals should be enrolled in the appropriate program on the date that they entered the program. If data is not entered on the same day, back date the program entry date.
- All individuals should be discharged on the date that they leave the program. If the data is not entered on the same day, back date the program exit date.

Additional DCA Grantee Requirements

- Upon intake, a “Barriers to Housing Stability” assessment should be completed
- Upon intake, a housing stability plan should be developed
- Housing Status, Employment Status and Benefits Status should be updated upon program entry, program exit, and 30, 90 and 180 days after program exit

Other Requirements

- If an agency wishes to run an ESGP report on their program, they must enter at least one service transaction for each individual they are serving

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS EMERGENCY SHELTER

General Requirements

- A program should be set up for each separate Emergency Shelter program. Program profile data should be completed.
- At intake, all universal data elements should be completed
Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status; Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry; Zip Code of Last Permanent Address
- All individuals should be enrolled in the appropriate program on the date that they entered the program. If data is not entered on the same day, back date the program entry date.
- All individuals should be discharged on the date that they leave the program. If the data is not entered on the same day, back date the program exit date.

Additional DCA Grantee Requirements

- At intake, all program data elements should be completed
Program Entry Date; Program Exit Date; Income at Entry and Exit; Income Sources at Entry and Exit; Services Received; Destination; Reasons for Leaving
- Upon intake, a “Barriers to Housing Stability” assessment should be completed (for individuals/families staying more than 3 consecutive nights)
- Upon intake, a housing stability plan should be developed (for individuals/families staying more than 3 consecutive nights)
- Housing Status, Employment Status and Benefits Status should be updated upon program entry, program exit and 90 days after development of housing stability plan

Other Requirements

- If an agency wishes to run an ESGP report on their program, they must enter at least one service transaction for each individual they are serving

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS MOTEL/HOTEL VOUCHERS

General Requirements

- A program should be set up for the Voucher Program. Program profile data should be completed.
- At intake, all universal data elements should be completed
Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status; Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry; Zip Code of Last Permanent Address
- All individuals should be enrolled in the appropriate program on the date that they receive the voucher. If data is not entered on the same day, back date the program entry date.
- All individuals should be discharged on the date that they no longer have a voucher. If the data is not entered on the same day, back date the program exit date.
- If vouchers are provided in multiple counties, ensure that the county where the voucher was provided is recorded

Additional DCA Grantee Requirements

- At intake, all program data elements should be completed
Program Entry Date; Program Exit Date; Income at Entry and Exit; Income Sources at Entry and Exit; Services Received; Destination; Reasons for Leaving
- Upon intake, a “Barriers to Housing Stability” assessment should be completed (for individuals/families staying more than 3 consecutive nights)
- Upon intake, a housing stability plan should be developed (for individuals/families staying more than 3 consecutive nights)
- Housing Status, Employment Status and Benefits Status should be updated upon program entry, program exit and 90 days after development of housing stability plan

Other Requirements

- If an agency wishes to run an ESGP report on their program, they must enter at least one service transaction for each individual they are serving

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS ONGOING SUPPORTIVE SERVICE PROGRAMS

General Requirements

- At intake, all universal data elements should be completed
*Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status;
Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry;
Zip Code of Last Permanent Address*

Additional DCA Grantee Requirements

- Service transactions should be logged every time that an individual receives services
- Upon intake, a “Barriers to Housing Stability” assessment should be completed
- Upon intake, a housing stability plan should be developed
- Housing Status, Employment Status and Benefits Status should be updated upon program entry, program exit and 90 days after development of housing stability plan

Other Requirements

- If an agency wishes to run an Annual Progress report on their program, they must set up a program and enroll and discharge the individuals they are serving
- *If an agency receives DCA funding and wishes to receive follow-up alerts (in phase 2 of Outcomes) they must set up a program and enroll and discharge the individuals they are serving. If they do not set up a program, they are responsible for tracking their own follow-up schedule*

H.3 GEORGIA HMIS REQUIRED DATA ELEMENTS ONE TIME BASIC NEEDS SERVICE/FEEDING PROGRAMS

DCA Grantee Requirements

- At intake, all universal data elements should be completed on any individuals that are receiving homeless specific services
Name; Social Security Number; Date of Birth; Ethnicity and Race; Gender; Veteran Status; Homeless Status; Special Needs; Disabling Condition; Residence Prior to Program Entry; Zip Code of Last Permanent Address
- A Service Transaction should be recorded to track what service the individual received.
- Very high volume services (soup kitchens, etc) may request an exemption or alternative method of capturing data from DCA if necessary

Other Requirements

- If an agency wishes to run an Annual Progress report on their program, they must set up a program and enroll and discharge the individuals they are serving

H.4 Additional Resources

State and Local

DCA/State Housing Trust Fund Website www.dca.state.ga.us

Pathways Website: www.pcni.info

Metro Atlanta Tri-Jurisdictional Collaborative Website: www.tri-j.net

Chatham – Savannah Authority for the Homeless Website: <http://www.homelessauthority.org/>

Metro Columbus Task Force for the Homeless: <http://www.homelessresourcenetwork.org/>

Cobb Community Collaborative: www.cobbcollaborative.org

National Resources

HMIS.INFO (HUD): www.hmis.info

Homelessness Resource Exchange (HUD): www.hudhre.info