



HMIS End User Best Practices

Tips and strategies to maximize the HMIS user experience.

Stay in The Know

HMIS Virtual Office Hours

Pinellas HMIS hosts Virtual Office Hours on the first Friday of each month. These Office Hours provide dedicated time for all users - whether you're new to HMIS or a seasoned user – to dive into specific topics, learn HMIS tips, and seek assistance or ask any HMIS-related questions. Join us on Zoom by registering via the [Community Calendar](#).

HMIS Newsletter

The monthly HMIS newsletter is sent out on the last Friday of every month and is a great way to stay up to date on any system changes, helpful tips and reminders, common issues identified by HMIS monthly data review, and upcoming trainings.

HMIS Help Desk

The HMIS Help Desk contains a wealth of information including FAQs, Policies, forms, training guides, and more! If you can't find the answer to your HMIS questions on the Help Desk, [submit a ticket!](#) The Pinellas HMIS team is happy to answer your questions or help troubleshoot any issues you may encounter with HMIS. A guide for how to submit a Help Desk Ticket can be found [here](#).

Best Practices for Data Entry & Quality

Timely Data Entry

The sooner data is entered into HMIS, the sooner it is available to service providers, and can be used for reporting and data analysis. While we encourage HMIS users to enter data in real-time, we understand this may not be realistic in all situations. Therefore, a standard of 72 hours is accepted.

When possible, build HMIS into your schedule:

- Block time off on your calendar specifically for HMIS data entry.
- Include 10-15 minutes at the end of client meetings to enter HMIS data.
- Complete all HMIS data entry by the end of the work week.
- Communicate timeline expectations if multiple staff engage in the data entry process (i.e. a different person enters data into HMIS than person collecting HMIS data).



Data Quality

Data quality refers to the reliability and validity of client-level data collected in the HMIS; in other words, it is the extent to which the data in HMIS reflects real world client information. High quality data is a cornerstone of our CoC's efforts to end homelessness. It enhances system-wide collaboration, maximizes the impact of available resources, provides a clearer understanding of housing instability in our CoC, and allows for data-driven advocacy and decision-making.

The Four Cs of Data Quality

Component	Definition	Importance
Complete	All data is entered into HMIS. This includes: <ul style="list-style-type: none"> • Clients, • Data quality drop downs, • UDEs, • Services, • Exit dates. 	Data completeness is crucial to finding clients the right services, and it facilitates accurate reporting and analysis on homelessness in our CoC. Incomplete data can negatively affect our ability to see population- and system- level characteristics, trends, and strategize appropriately.
Current	All data is entered no later than 72 hours after collection, and that data is up to date.	Timely data entry reduces human error, improves data management, and helps to ensure data is accessible when needed. It also increases the efficiency of service connections.
Correct	All data is entered accurately and reflects information provided by the client. Building trust with clients is helpful in obtaining accurate information.	Accurate data means our HMIS appropriately reflects the realities of the clients we serve. The more accurate the data, the more useful it is in connecting clients with the right services.
Consistent	Data entry standards are understood and met across all programs; there is standard and uniform practice for implementation, data collection, and data entry across all HMIS programs.	Consistent understanding, collection, and entry of data helps ease interpretation and improves accuracy.



Best Practices for Data Privacy & Security

Passwords:

Creating a strong password is just the first step; maintaining good password habits is just as important. You should avoid reusing passwords across multiple accounts or saving them in your browser. Additionally, we highly recommend enabling multi-factor authentication (MFA) whenever possible, adding an extra layer of protection beyond just your password. Staying vigilant and proactive in your password habits will help keep our clients and your digital life secure.

Open Networks:

Clients experiencing homelessness share sensitive personal information - including details about their health, finances, and personal histories - expecting it to be handled with care in HMIS. Preserving this trust is essential for providing effective services and ensuring data integrity. Using public Wi-Fi networks, such as those in coffee shops, libraries, or other shared spaces, can compromise data security. These networks lack encryption, making it easier for malicious activity to intercept sensitive information or gain unauthorized access. To protect client data, it is crucial to avoid open networks and follow secure practices.

Technology Use:

Always sign out of HMIS when you have finished entering data and/or are leaving your workstation. Similarly, be sure to sign out of your computer each time you leave your workstation. Never leave technology unattended.

General HMIS Tips

When searching for clients:

- Be sure to search for clients before creating a new profile. Start by searching using the first and last name of the client. Due to the potential for misspelling, it can be helpful to use just the first 3 letters of the first name, and the first 3 letters of the last name. Additionally, you can combine this partial name search with other fields such as Date of Birth and Social Security number (partial or full).
- If it is identified that a client has more than one profile, submit a Help desk ticket so the duplicate profiles can be merged.

Summary Tab:

Keep in mind that the Summary Tab in HMIS is for view only. When entering information into HMIS, think of the Summary Tab as an overview of the latest information entered by all end users. If information needs to be entered or updated, be sure to go into the Entry/Exit tab. When users enter information on the Summary Tab it is not attached to the program and results in lost data and errors



“Other”, “Client Doesn’t Know”, “Client Prefers Not to Answer”:

Only select “other” from dropdowns if the client’s response truly cannot be even loosely described by any of the available options; choose what most accurately reflects reality and what is known.

“Client doesn’t know” is an available option for most data elements in Pinellas HMIS. Use this option only when a client truly does not know the information being asked of them. For example, if a client does not remember any digits of their social security number, you may select “Client doesn’t know” under the data quality dropdown for that element.

Choose “client prefers not to answer” from dropdowns if a client elects not to provide the information being asked; this option is for use when a client refuses to provide the requested information, rather than when they are unable to provide information because they do not know.

Check data frequently:

Check how fresh your data is! The history bar next to each data field shows the last date data was entered and the end user who entered the data. During the entry process, ensure that all fields are accurate and up to date. When working with existing clients in HMIS all data will be inherited from the previous end user. It is the responsibility of every end user to update all information at the time of each program entry or shelter stay. Client data may change on a daily basis. The bar colors represent how current the data is but do not necessarily indicate data accuracy. In this case, if you click on any of the bars, you will see the last date the data was entered and by whom. The darkest shade of red indicates the oldest data, whereas the brightest green represents the newest data.

A screenshot of two data entry fields in HMIS. The first field is labeled "Approximate date homelessness started:" and contains a date picker set to "04 / 20 / 2020". To the right of the date is a horizontal bar with a color gradient from dark red to bright green, representing data freshness. The second field is labeled "Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today" and contains a dropdown menu set to "Four or more times (HUD)". A yellow arrow points from the date field to the dropdown menu.

You can also utilize HMIS reports to monitor data quality! More information on reporting can be found on [here](#).

When in doubt, ASK!

Taking the time to ensure your questions are answered before entering data into HMIS or making changes to HMIS data will increase your HMIS knowledge and prevent the possibility of additional HMIS data clean-up if data is entered incorrectly. If you can’t find the answer to your HMIS questions on the Help Desk, [submit a ticket!](#)