

Welcome to Pinellas HMIS



Pinellas HMIS Staff



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Agenda

HMIS 101

Getting Started in Pinellas HMIS

Expectations & Support

HMIS 101

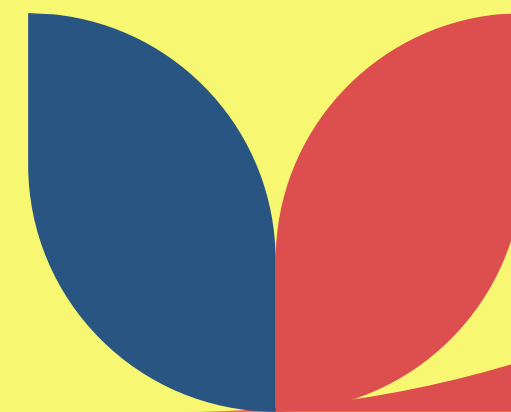


What is HMIS?

A Homeless Management Information System (HMIS) is a local system used to collect client-level data and data on the provision of housing and services to **homeless** individuals/families and persons **at imminent risk of homelessness**.

Each Continuum of Care (CoC) is responsible for selecting an HMIS software solution that complies with HUD's data collection, management, and reporting standards.

Pinellas HMIS uses WellSky Community Services as their HMIS vendor.



Why is HMIS Used?

HMIS is administered by the U.S. Department of Housing and Urban Development (HUD).

HMIS is used:

- By all projects that target services to persons experiencing homelessness.
- To measure project performance and participate in benchmarking of the national effort to end homelessness.

Funders That Require HMIS Use

Federal:

- U.S. Department of Housing and Urban Development (HUD)
- U.S. Department of Veterans Affairs (VA)
- U.S. Department of Health & Human Services (HHS)

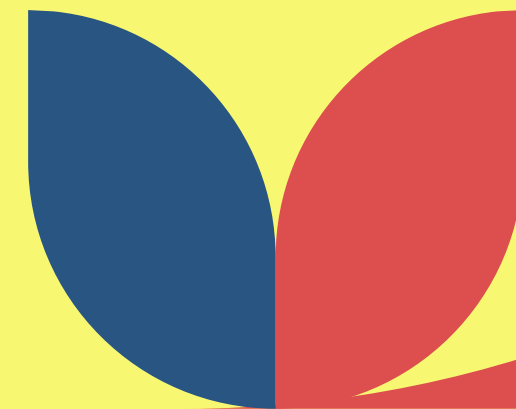
State:

- Florida Department of Children and Families (DCF)

Local:

- City
- County

HMIS workflows, reporting requirements, and programmatic outcomes are determined by the funding source for a project.



HMIS Reporting

Four System-level HUD Reports to track and measure a CoC's performance and progress toward ending homelessness:

- Longitudinal System Analysis (LSA)
- System Performance Measures (SPMs)
- Housing Inventory Count (HIC)
- Point-in-Time Count (PIT)

HMIS usage is becoming more common in state and local funding contracts.

Data Quality: The 4 C's

1

Complete

Ensure all data is entered.

2

Current

Ensure all data is up to date.

3

Consistent

Ensure data entry standards are valued across programs.

4

Correct

Ensure you are entering accurate data.

The background features a solid red upper half and a solid dark blue lower half. In the top-left corner, there is a light green quarter-circle. In the top-right corner, there is a large shape resembling a stylized leaf or drop, split vertically into white and yellow. In the bottom-left corner, there is a white circle partially enclosed by a dark blue shape. In the bottom-right corner, there is a yellow rounded rectangle.

Getting Started in Pinellas HMIS

How does an agency join Pinellas HMIS?

HMIS Member Agencies must first be a member of the Continuum of Care

- [CoC Membership Information](#)
- [Become a CoC Member](#)
- [CoC Membership Application](#)

After joining the CoC, an agency can begin the process of joining Pinellas HMIS

- *The process can take time, so it is important to start early!*

To start the membership process for Pinellas HMIS Please complete the HMIS Prospective Agency Intake Form:

- [HMIS Prospective Agency Intake Form](#)

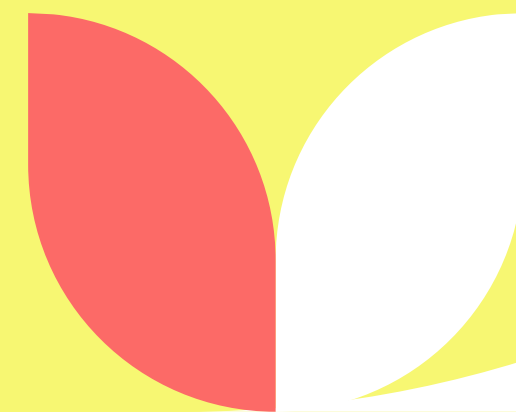
Onboarding

If your agency is not currently entering data in HMIS, then it's important to schedule an Onboarding Discussion with the HMIS team to discuss the Welcome Packet, your agency/program needs, and HMIS expectations.

Welcome Packet

1. Participation Agreement
2. Privacy Notice
3. User Permission Request Form
4. End User Agreement (Passing Date for Level II Background Screening required)
5. Workflow Training
6. Informed Consent & Release of Information

To schedule an onboarding discussion with Imani Smith, Manager of HMIS & System Administration, complete the [HMIS Prospective Agency Intake Form](#).



**Participation Agreement
Between
Homeless Leadership Alliance of Pinellas, Inc.
and**

_____(Agency)

This agreement is entered into on _____(dd/mm/yy) between the Homeless Leadership Alliance of Pinellas, Inc., hereafter known as "HLA," and _____(agency name), hereafter known as "Agency," regarding access and use of the *Pinellas Homeless Management Information System Project*, hereafter known as "PHMIS."

I. Introduction

The PHMIS, a shared human services database, allows authorized personnel at homeless and human service provider agencies throughout the Continuum of Care (CoC), to enter, track, and report on information concerning their own clients and to share information, subject to appropriate inter-agency agreements, on common clients.

HMIS's goals are to:

- Improve coordinated care for and services to homeless persons in Pinellas County;
- Provide a user-friendly and high-quality automated records system that expedites client intake procedures, improves referral accuracy, and supports the collection of quality information that can be used for program improvement and service-planning; and
- Meet the reporting requirements of the U.S. Department of Housing and Urban Development (HUD), Housing Development Authority (HDA) and other funders as needed.

In compliance with all state and federal requirements regarding client/consumer confidentiality and data security, the Homeless Management Information System (HMIS) is designed to collect and deliver timely, credible, quality data about services and homeless persons or persons at risk for being homeless. The Homeless Leadership Alliance (HLA) administers the PHMIS.

II. HLA Responsibilities

1. HLA will provide the Agency 24-hour access to the PHMIS data-gathering system, via internet connection.
2. HLA will provide model Privacy Notices, Client Release forms and other templates for agreements that may be adopted or adapted in local implementation of PHMIS functions.
3. HLA will provide both initial training and periodic updates to that training for core Agency Staff regarding the use of the PHMIS, with the expectation that the Agency will take responsibility for conveying this information to all Agency Staff using the system.
4. HLA will provide basic user support and technical assistance (i.e., general trouble-shooting and assistance with standard report generation). Access to this basic technical assistance will normally be available from 9:00 a.m. to 5:00 p.m. on Monday through Friday (with the exclusion of holidays). PHMIS staff will also be accessible during non-standard operating hours in accord with procedures that will be published and periodically updated by HLA.

1. Participation Agreement

The first step to gaining access to HMIS.

Highlights some of the HLA responsibilities:

- Help Desk
- Training

Highlights some of the agency responsibilities:

- Client privacy and confidentiality

Must be signed by agency CEO and once returned, it will be signed by the HLA CEO, and the executed copy will be sent back.



2. Privacy Notice

Pinellas Homeless Management Information System Privacy Notice

In accordance with Federal Regulations, each jurisdiction that receives local, state, and federal funding must have, and enter data into, a Homeless Management Information System (HMIS), which in Pinellas County is called *Pinellas Homeless Management Information System*, or Pinellas HMIS (Pinellas HMIS). In addition, each agency that participates in a collaborative client information system in accordance with F.S. 163 Part VI will notify clients of their participation.

Pinellas Homeless Management Information System (Pinellas HMIS) is a computerized system that collects, stores, and shares information about people who receive services from this agency. **Since this agency is a Homeless Leadership Alliance Member Agency, it participates in the Pinellas HMIS.** This client information system is used to determine your eligibility needs and provides this Member Agency a record for evaluating their services; only collecting information that is needed to provide you with the appropriate services.

Data is collected and shared, with your written consent when you meet with this Member Agency in person. Data is also collected and shared when verbal consent is obtained specifically in the case of the Diversion Teams, the Street Outreach and 211 Homeless Helpline. In the event of a declared emergency, verbal consents can be obtained from clients for all partner agencies with the approval of the Continuum of Care (CoC). You are giving consent for this Member Agency to access, enter, and share your personal information in the Pinellas HMIS.

The collection and use of all personal information is protected by strict standards of confidentiality as outlined in writing in the Pinellas Homeless Management Information System Policies and Procedures Manual.

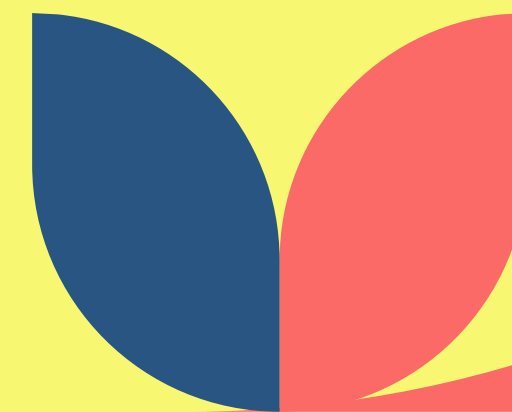
Data will only be reported in aggregate, non-identifiable format for research purposes. No personal data is disclosed for administrative or research purposes except to other Homeless Leadership Alliance Member Agencies. Individually identifiable personal information is only disclosed in accordance with your authorization or as authorized by law. No client data collected is ever sold.

A copy of this Privacy Notice is available upon request for your review.

This privacy statement notifies the client that their data is protected by strict local, state, and federal laws that all HMIS Member Agency providers must follow as well as the Pinellas HMIS Policies & Procedures.

The Privacy Notice should be somewhere visible where an agency receives clients. There is a Spanish version for Spanish speaking clients.

[Available on the Help Desk](#)



New or Returning Staff Members Who Need HMIS Access

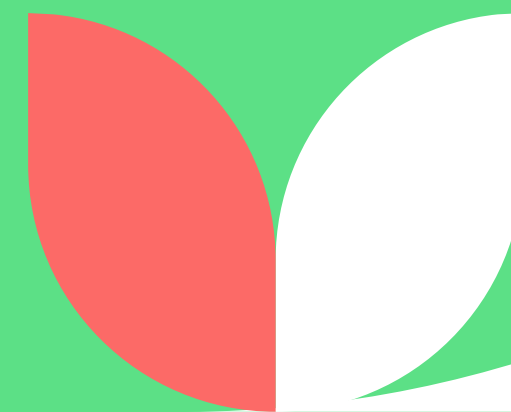
The user needing
HMIS access must
complete the
following:

Level II Background
Screening

Most current DCF
HIPAA Basics training

Most current DCF
Security Awareness
training

End User Agreement
form

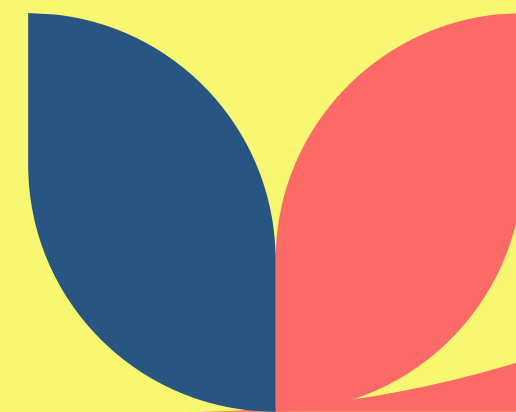


Level II Background Screening

If your agency does not have an OCA number and ORI number, it is highly recommended that you start the background screening process asap. It is the responsibility of the provider to take the lead and initiate the process.

Agency for Health Care Administration (AHCA) has provided training material on the following website:
www.myflfamilies.com/services/backgroundscreening

You as the provider must complete a User Registration Agreement in order to gain access to the Clearinghouse, at which point an OCA # will be issued.





**Pinellas Homeless Management
Information System (Pinellas HMIS)
End User Agreement**

Please select your PHMIS role: Agency Administrator End User

Name _____
Please Print

Agency Name _____
Please Print

Phone Number _____

Email Address _____
Please Print

I understand that as a condition of my employment or affiliation with the agency above, I must sign and comply with the terms of this agreement. I agree that my obligations under this agreement will continue after the termination of my employment or affiliation with this member agency. By signing this document, I understand and agree that:

I meet the Level 2 screening requirements set forth in Florida Statute (F.S.) 435.04. I attest that I have not been arrested with disposition pending or found guilty of, regardless of adjudication, or entered a plea of nolo contendere or guilty to, or have been adjudicated delinquent and the record has not been sealed or expunged for any offense prohibited under any of the provisions of Florida Statutes 435.04 or under any similar statute of another jurisdiction. In addition, I attest that I have not been convicted of, regardless of adjudication, nor entered a plea of nolo contendere or guilty to or have been adjudicated delinquent and the record has not been sealed or expunged, for any criminal charges in any way related to identity theft or fraud in Florida or any other state. I further acknowledge that I must immediately notify my supervisor within one business day of any arrest and any changes in my criminal record involving any of the provisions listed in F.S.435.04 or any criminal charges in any way related to identity theft or fraud.

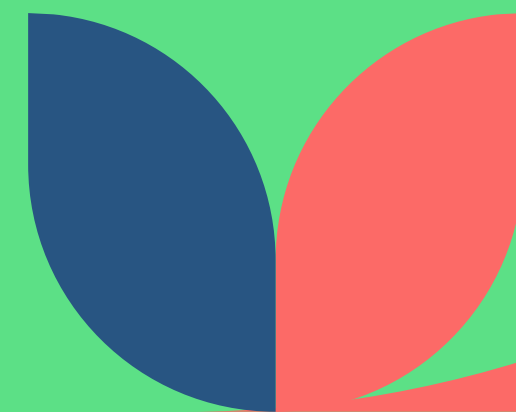
1. I understand that I will be entering and viewing client information in a web-based data system called Pinellas HMIS and/or sharing this information with other agencies in my community in order to do my job more effectively and to better assist the clients my member agency serves.
2. I will keep my user name and password to access Pinellas HMIS confidential and secure at all times. I will not share these codes with anyone including other employees or affiliates of my member agency or I understand that I will be in violation and my access will be terminated from the system.
3. I understand the collection and use of client personal information is protected by strict standards of confidentiality as outlined in writing in the Pinellas HMIS Policies and Procedures and will only be disclosed in accordance with applicable Florida state and federal laws. I will maintain client privacy, protect, and safeguard the confidentiality of client information in accordance with state and federal laws. During the course of my employment or affiliation, I may enter, view, see or hear other confidential information such as social security numbers, financial data and business information that my member agency must maintain as confidential.
4. I, as an employee or volunteer of my member agency, have a legal obligation to maintain client privacy, to protect and safeguard the confidentiality of all clients' individually identifiable personal and health information as known as "client information." Client information shall include, but not be limited to, the client's name, social security number, date of birth, alias, address, telephone numbers, universal data elements, and program-specific data elements, services received, case notes, program entry/exit, type of medical care provided, medical condition or diagnosis, and all other information relating to the client's treatment entered or viewed in Pinellas HMIS.

3. End User Agreement

The End User Agreement is part of the packet to get HMIS users trained. Must be signed by the user after they have read it and there needs to be a witness signature.

Reaffirms individual user responsibilities.

- Privacy and confidentiality
- Data security



4. User Permission Request

This form is online and must be completed (along with prerequisites) prior to scheduling HMIS training.

The form asks for the user's intended access level, contact information, and desired programs.

All end-users in HMIS must pass a **Level 2 Background Clearance** and provide the ORI Number and the date of clearance.

- If your agency does not have an ORI number, it is highly recommended that you start the background screening process asap.

Prerequisites that need to be attached to the online form:

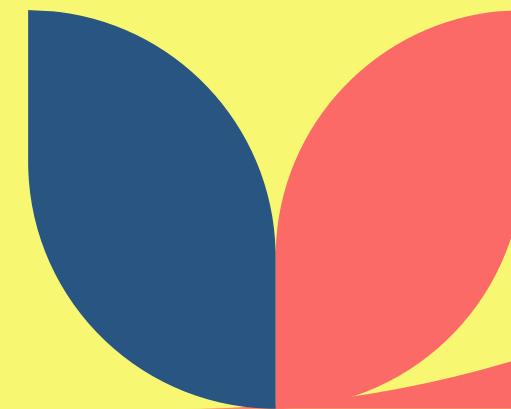
- Signed End User Agreement
- DCF HIPAA certificate
- DCF Security Awareness certificate

Below, you will find links to the Wufoo form and required trainings prior to HMIS Training.

<https://pinellashmis.zendesk.com/hc/en-us/articles/21282073873299-End-User-Agreement-FY-2023-2024>

[My FL Learn | Florida DCF \(myflfamilies.com\)](https://myflfamilies.com)

<https://hlapinellas.wufoo.com/forms/zousn810q8cvzn/>



Requesting HMIS Data Entry Training

Once the new user has completed the required documentation and prerequisites, Agency administrators must then complete the New User Permission request Wufoo form online


Please be sure to attach the signed End User Agreement, HIPAA Basics certificate, and Security Awareness certificate the Wufoo request form. There will also be a section for the Level II Background ORI # and clearance date

All of this information and forms can be found on our help desk under Frequently Asked Questions: [Request a New User](#)

User Permission Request Form

User Permission Request

Today's Date



MM DD YYYY

* This request is for:

A new user

Changing a user's information/program access

Removing a user

* Will the user need to run reports?

Yes

No

Is this request for an SSVF user?

Yes

No

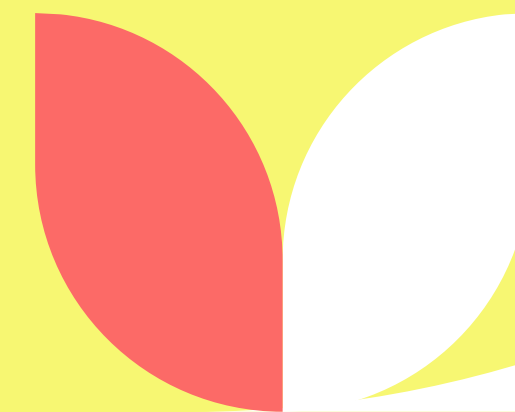
Will this user need to enter VI-(F)SPDATs?

Yes

No

It's of the utmost importance to answer all questions on this form.

If at any time you are unsure, reach out to the helpdesk.



User Permission Request Form Cont.

HMIS User Information

* User's First & Last Name

Job Title

* Email

* Phone Number

* Primary Provider

* Other programs they enter data for

* HMIS Project Workflow (Please select all that apply)

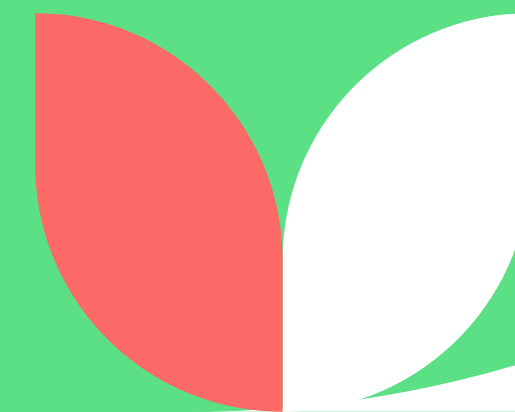
- Entry/Exit Workflow
- Shelters Workflow
- Services Only Workflow
- View Only Workflow

Primary Provider is the main program on which the user will enter data. If the user is working multiple programs/grants that information should be entered in the box below. Including the program number is recommended.

HMIS Project Workflow is determined at onboarding. You should be clear at all times which workflow is required for your projects and individual users.

This is one of the biggest things you can do to ensure the Data Quality 4 C's are followed. Complete, current, consistent, correct.

If you need guidance, please reach out to the helpdesk.




User Permission Request Form Cont.

HMIS Specialized Project Workflow (Please select all that apply)

- Coordinated Entry Workflow
- Street Outreach Workflow
- RRH/PSH Workflow
- SOAR Workflow
- RHY Workflow

* ORI Number ?

* Level 2 Background Screening Clearance Date ?



MM DD YYYY

* The following documents have been attached below

- Signed End User Agreement
- Most current DCF HIPAA Certificate
- Most current DCF Security Awareness Certificate

* Are all three documents in ONE pdf?

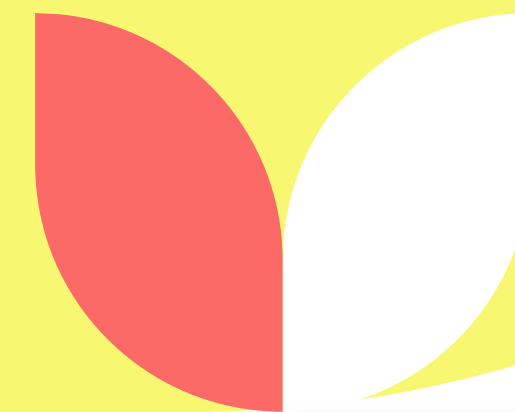
Yes

No

Some workflows will require individual or specialized training.

The last few questions pertain to the background clearance, DCF training and user agreement.

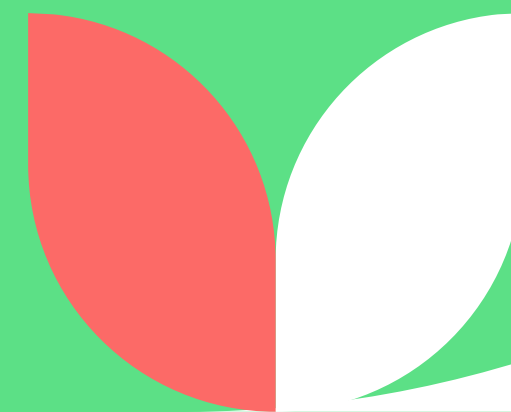
There is a place to upload these docs individually or as one PDF.



New or Returning Staff Members who need HMIS Access



This process and the associated forms can be found on our help desk under Frequently Asked Questions: [Request a New User](#)

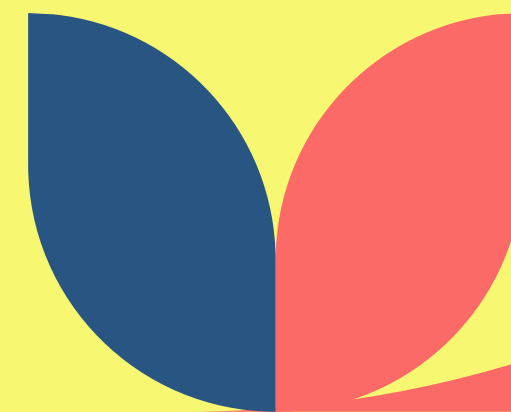


Communication after New User Request:

HMIS has received your new user permission request through Wufoo with the required training completion certificates attached from your organization. Please discuss which HMIS Workflow you will be following with your supervisor and register for training on the HLA [Community Calendar](#) to get started towards gaining access to the Homeless Management Information System (HMIS). Please see the training outline below for what to expect moving forward.

1. Once you register for HMIS Workflow Training, you will get an email confirmation with the Zoom link for your live training, please read the outline in preparation and add to your calendar.
2. A follow-up email will be sent granting new user access to the online training site (Talent LMS), and you will be assigned the appropriate courses once live training is complete.
3. After your online Talent LMS training courses are complete, reply to the email from step 2, and HMIS staff will start building your new user HMIS profile.
4. HMIS access will be granted and log in credentials will be emailed to the new user.
5. You will find helpful links to additional training opportunities in the email granting initial access to HMIS. Please be sure you are comfortable with your HMIS Workflow and reach out if you require additional training.
6. A one-on-one follow-up training zoom invite will be sent to complete the training process 3 weeks from the initial HMIS access date. This final training is an opportunity for the HMIS trainer to shadow entries, check data quality, review workflow and answer any questions. This step must be completed to retain HMIS access, please add it to your calendar when received.

Please feel free to reply with any questions or clarification. HMIS looks forward to working with you to serve the community!



5. Workflow Training

A Workflow is how you enter data into HMIS.

There are 4 main workflows in Pinellas HMIS:

- **Entry/Exit Workflow**
(Every 1st and 3rd Tuesday)
- **Services Only Workflow**
(Every 2nd and 4th Wednesday)
- **Shelter Workflow**
(Every 1st and 3rd Wednesday)
- **HMIS Rapid Re-Housing Workflow Training**
(Every 3rd Thursday)





Pinellas Homeless Management Information System Client Informed Consent and Release of Information

Please read the following notice (or ask to have it read to you) before signing.

This agency participates in the Pinellas Homeless Management Information System (Pinellas HMIS). Member Agencies participating in Pinellas HMIS collect data and share information with each other through a shared, internet-based database. The data in Pinellas HMIS is used to streamline assistance, reduce how often you must answer basic questions, reduce how many times you must share your story to service providers, and help in the coordination of services.

This agency is required by local, state, and federal requirements and/or by other organizations that provide funding to operate these programs to collect your personal information from you. The information this agency collects about you will be shared, with your written consent, via the Pinellas HMIS database and is used to improve services to you, better understand your needs, and demonstrate why continued funding is necessary to operate their programs. Data is only reported in aggregate, non-identifiable formats for research, reporting, or educational purposes only.

Your data is protected by strict local, state, and federal laws that all HMIS Member Agency providers must follow as well as the Pinellas HMIS Policies & Procedures. This Agency's staff has been trained by Pinellas HMIS staff on the policies, ethics, and laws regarding the protection, privacy, and confidentiality of your information and all users have completed formal background checks to comply with state law. The Pinellas HMIS software vendor, WellSky, maintains industry-standard security protocols and provides regular updates to the software to ensure the security of the database and the privacy of your information.

The data collected about you and any household members will only be shared with other Pinellas HMIS Member Agencies with your written, or verbal, consent as indicated on this form and will include basic identifying information, demographics, and other personal information (such as income, health insurance, disabilities, and homeless history) to help best meet your needs and determine program eligibility.

Your information is only shared with your consent until you revoke this consent in writing. If you do not consent to have your information shared at this time, no other agency with access to Pinellas HMIS will be able to access your information. You can not be denied services for choosing not to share information. However, even if you choose not to share your information with other Pinellas HMIS Member Agencies, this Agency may still be required by federal and/or state regulations to complete some limited data collection for funding and eligibility purposes.

Type of Information to be Collected and Shared:

1. Personal identifying information such as Name, Social Security Number, Date of Birth, Race, Ethnicity, Gender, Veteran Status
2. Program Information such as Program Enrollments, Assessment Information, Services, Referrals

Please indicate your choice for data sharing by checking the box (list of Member Agencies on Page 2):

- I agree to share my information, and my children's information, with all participating agencies in Pinellas HMIS.
- I agree to share my information, and my children's information, with all participating agencies in Pinellas HMIS except for:
- Program Enrollments
 - Assessments
 - Services
 - Referrals
- I do not want to share my information, and my children's information, with other participating Agencies in Pinellas HMIS.

6. Informed Consent & Release of Information

This document informs the client that your agency participates in Pinellas HMIS and that participating agencies collect data and share information with each other through a shared database.

The form states that the client's information is only shared with their consent until they revoke this consent in writing. The client will indicate that they agree to share all, some, or none of their information with the selected agencies.

The form is valid for 3 years unless the client wants to update any information.

* [Available on the Help Desk](#)



Expectations & Support



What is Expected of You/Your agency?

Have a designated Agency Administrator for your Agency.

Agency Admins keep the Lead Agency updated on:

- User changes and permission requests
- Project changes and requests
- Ensure users complete all six training steps
- Funding changes

Users go through training, both initially and when asked to by the Lead Agency

Complete accurate and timely data entry

- The minimum requirement for any agency/program entering into HMIS are the Universal Data Elements
- Data Quality benchmark reports are an important way to ensure accurate data entry; you are expected to use the data quality reports to make corrections to your data on a monthly basis.
- Timely data entry allows for our system to function. For data entry into HMIS, timely is within **72 hours**



Day-to-Day Monitoring Tasks for Agency Administrators



Monitor your agency's data quality



Ensure data is entered in a timely fashion



Ensure that your agency's data is updated and accurate



Watch for duplicate/overlapping Entry/Exits



Ensure Housing Move Dates are added for all clients housed through Rapid Rehousing and Permanent Housing programs



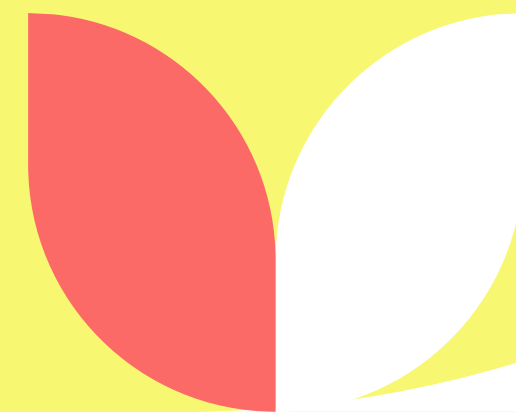
Ensure bed lists are accurate and up-to-date

When Do You Need a New HMIS Project?



Information and forms can be found on our help desk under
Here is the link: [Pinellas HMIS Programs](#)

[Pinellas HMIS](#) > [Programs, Data, and Reporting](#) > [Pinellas HMIS Programs](#)



We used to get this funding and now we have it again. Can we use the old project?



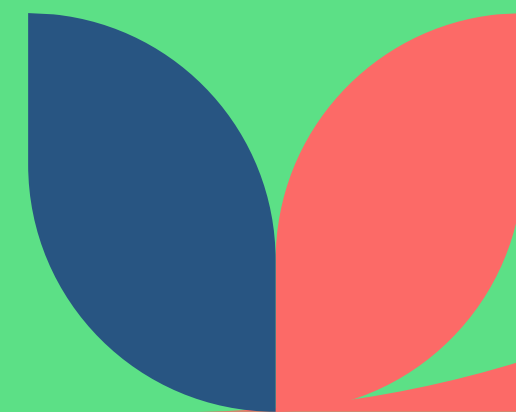
Most likely no, but it depends on the project type and funding stream.



A locally funded drop-in center or services only project could re-use the same project in HMIS.



A new shelter/housing project or rapid rehousing project can not use the same project in HMIS.



Setting up a New Project

HMIS Staff needs the following information for *any* project that is being setup:

Project Type

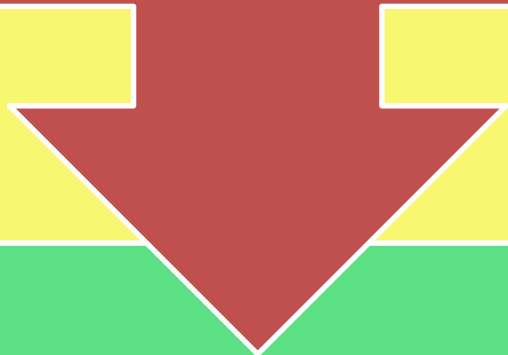
Funder and grant type

Reporting
Requirements/Outcomes

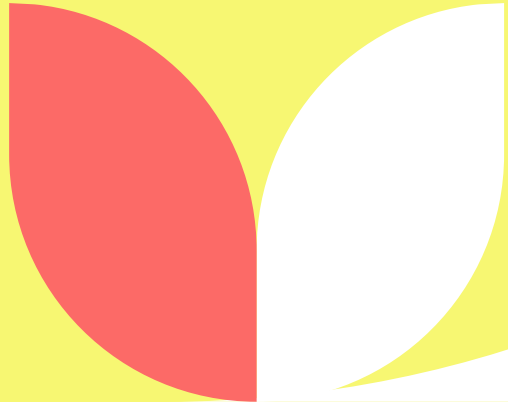
Services that are funded

Any other grant-specific
information like target
populations

Any special
considerations, custom
data elements, etc.



A [Pinellas HMIS Project Request Form](#) will need to be completed for each new project that is being added to HMIS.

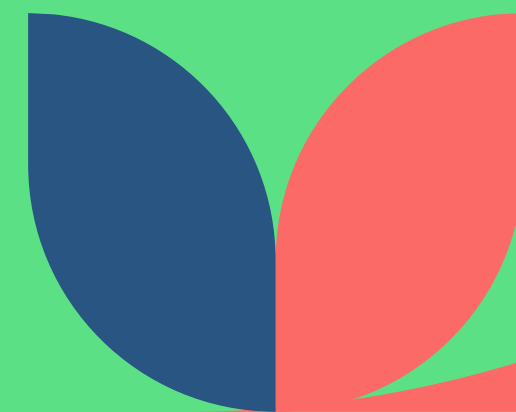


Group or One -on-One Refreshers



If you would like to schedule a group or one-on-one refresher training, please submit a ticket to the helpdesk.

These trainings may include, but are not limited to Street Outreach, GPD, RRH and VI-(F)SPDAT workflows.



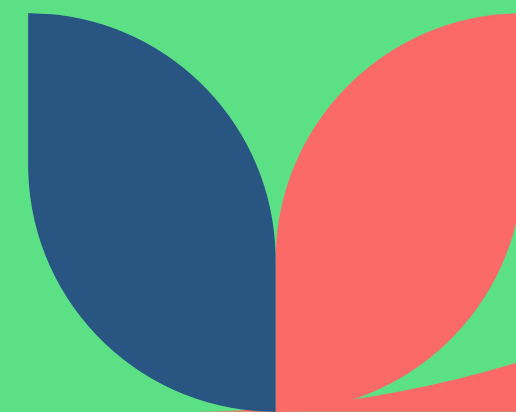


Help Desk Tickets

The quickest and easiest way to reach out to HMIS Staff is through the Pinellas HMIS Help Desk!

Tips :

- Submit a ticket by going to the [Pinellas HMIS HelpDesk](#) website OR by emailing support@pinellashmis.zendesk.com
- Be sure to be as descriptive as possible!
- Including screenshots and pictures is *highly* encouraged and very helpful to HMIS staff.



Pinellas HMIS Virtual Office Hours



One of the best ways to learn new tips and become a confident and skilled HMIS user is to join us once a month.

Pinellas HMIS is hosting virtual office hours on the first Friday of every month from 2:00pm to 3:00pm.

Any End-users that would like to attend can register through the SignUp Genius link found on:

- [Community Calendar](#)
- [HMIS Monthly Newsletter](#)

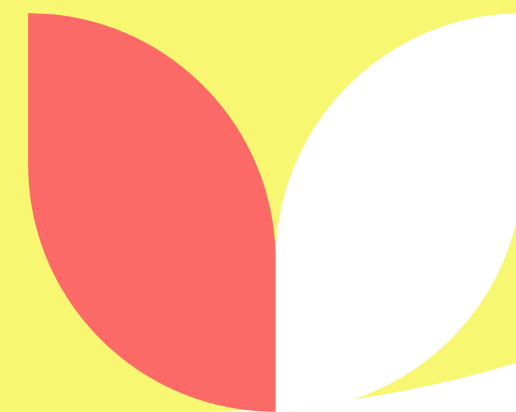




The HMIS monthly newsletter is sent out the last Friday of every month. Topics within the newsletter include:

Newsletter

- HUD or WellSky updates to HMIS
- Talent updates
- Common issues identified in HMIS monthly data review
- Quick tips
- Registration links for HMIS Office hours and other trainings
- Data Quality Gold Star Award Recipient



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