# HMIS Release Notes

## Annual Assessment Reminders, BNL Income, Potentially Dedicated Plus and Past Reservation

### March 11, 2021

## What are the changes?

**NEW FEATURE**

**1. Yearly Assessment Reminder Alerts**

A new automatic client alert has been released that informs staff when a client is due for a yearly assessment update. The alert will show on any dashboards that currently display client alerts, such as the CAN/211 Dashboard, and will appear 30 days before the enrollment annual assessment is due and will look at the last 3 year's enrollment records when deciding to display an alert. The alert will automatically disappear within 24 hours of a yearly assessment being completed. Please note, the alert will only be viewable under the organization the program enrollment belongs to.

Enrollments associated with the below project types will see these alerts.

- 2 -Transitional Housing (TH)
- 3 - PH - Permanent Supportive Housing (disability required for entry)
- 9 - PH – Housing Only
- 10 - PH - Housing with Services (no disability required)
- 14 - PATH
- 15 - PH - Rapid Re-Housing

This change is visible on all case management roles.

## UPDATES

**2. Additional Income Data on By Name List Registry views**

Columns have been added for "Latest SSI Amount" and "Latest SSDI Amount" and are visible on the Excel Export when running either the Single Score Summary (Registry) or Family Score Summary (Registry).

This change is visible on any role with access to these views.

*PATH to Views: Left Menu > VI-SPDAT v2 > VI-SPDAT – Dashboard (Current)  > Single Score Summary (Registry) or Family Score Summary (Registry)*

**3. "Referral Created By" column added to Past Reservations Schedule View**

A "Referral Created by" column has been added to the Appointment Schedule views located on the Coordinated Access – 211 and Coordinated Access – Network roles, documenting who created the referral/appointment.

*PATH to View: Left Menu > Appointment Schedule > CA – Appointment Schedule / EP – Appointment Schedule > Action Gear > View PAST Reservations*

**4. "Age" column added to Upcoming Reservations Schedule View**

An "Age" column has been added to the Appointment Schedule views located on the Coordinated Access – 211 and Coordinated Access – Network roles

*PATH to View: Left Menu > Appointment Schedule > CA – Appointment Schedule / EP – Appointment Schedule > Action Gear > View UPCOMING Reservations*

**5. "Potentially Dedicated Plus" added to "Has Chronic Homelessness been Verified by a person?"**

The "Client Status on By Name List (BNL)" forms "Has Chronic Homelessness been Verified by a person?" question has been updated to add "Potentially Dedicated Plus" as an option.

*ROLE: Coordinated Access – Network*
*PATH to View: Left Menu > CAN Assessments >* Client Status on By Name List (BNL)

## Which users are impacted?

1. **Yearly Assessment Reminder Alerts**
   – Case Managers and data entry staff for the previously mentioned program types.

2. **Additional Income Data on By Name List Registry Export**
   – Users of the By Name List Registry

3. **"Referral Created By" column added to Past Reservations Schedule View**
   – 211 and Coordinated Access Network staff

4. **"Age" column added to Upcoming Reservations Schedule Export**
   – 211 and Coordinated Access Network staff

5. **"Potentially Dedicated Plus" added to "Has Chronic Homelessness been Verified by a person?"**
   – Coordinated Access Network staff

## How does this help?

1. **Yearly Assessment Reminder Alerts**
   – This feature helps avoid last-minute data entry for reporting on the APR and other funder reports, which require a yearly assessment.

2. **Additional Income Data on By Name List Registry Export**
   – Provides additional context to types of income the client is receiving.

3. **"Referral Created By" column added to Past Reservations Schedule View**
   – This additional data ties a referral to a specific staff person.

4. **"Age" column added to Upcoming Reservations Schedule Export**
   – This additional data allows CAN navigators to quickly assess referrals for youths when exporting the upcoming reservations list.

5. **"Potentially Dedicated Plus" added to "Has Chronic Homelessness been Verified by a person?"**
   This field is similar to "Potentially Chronic" as it indicates clients who potentially are 'Dedicated Plus (Verified)' but are missing the disabling condition documentation. While potentially chronic is only for clients that have the twelve consecutive months homelessness or twelve months across 4 episodes of homelessness, 'Potentially Dedicated Plus' is for clients who have twelve months in the last three years and are lacking disabling condition documentation.

## When will I see these changes in HMIS?
**Thursday, March 11, 2021**

## Summary of the changes:

1. **Yearly Assessment Reminder Alerts –** Added as an automatic client alert to 211/CAN dashboard

2. **Additional Income Data on By Name List Registry Export**
   – Columns have been added for "Latest SSI Amount" and "Latest SSDI Amount" on the Individual and Family BNL lists.

3. **"Referral Created By" column added to Past Reservations Schedule View**
   – A "Referral Created by" column has been added to the Appointment Schedule views for past reservations.

4. **"Age" column added to Upcoming Reservations Schedule Export**
– An "Age" column has been added to the Appointment Schedule view Excel Export located on the Coordinated Access – 211 and Coordinated Access – Network roles

5. **"Potentially Dedicated Plus" added to "Has Chronic Homelessness been Verified by a person?"**
– The "Client Status on By Name List (BNL)" form's "Has Chronic Homelessness been Verified by a person?" question has been updated to add "Potentially Dedicated Plus" as an option.

## Screenshots of Changes

1. **Yearly Assessment Reminder Alerts**

| Date | Summary | Severity | First Name | Last Name |
|---|---|---|---|---|
| | This client has no current Release of Information | Important | administrator | administrator |
| 12/06/2018 | Annual Assessment Due: 12/06/18, Enrollment: 3867, Program: Safe Futures Inc. - Flora O'Neil (SHP)(CT0087) | Informational | administrator | administrator |
| 12/06/2019 | Annual Assessment Due: 12/06/19, Enrollment: 3867, Program: Safe Futures Inc. - Flora O'Neil (SHP)(CT0087) | Informational | administrator | administrator |

Client Alerts (3)

2. **Additional Income Data on By Name List Registry views**

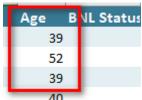| BQ | BR |
|---|---|
| **Latest SSDI Amount** | **Latest SSI Amount** |
| $0.00 | $0.00 |
| $0.00 | $0.00 |
| $0.00 | $0.00 |

3. **"Referral Created By" column added to Past Reservations Schedule View**

4. **"Age" column added to Upcoming Reservations Schedule Export**



5. **"Potentially Dedicated Plus" added to "Has Chronic Homelessness been Verified by a person?"**