**Notes from HMIS User Group Meetings – September 2008**
September 4 – Catholic Charities in Cicero; September 11 – Catholic Charities in Des Plaines; September 25 – South Suburban Family Shelter in Homewood

User Group Meetings
We plan to have one user group meeting in October. The time and place will be announced. We will NOT have user group meetings in conjunction with the CBSA meetings in October.

Training
End user training will be held on October 30 and advanced agency administrator training on October 31 at the Robert Morris College campus in Orland Park. The advanced administrator training will cover how to use the canned reports available in ServicePoint (including how data is pulled for the APR report), using ReportWriter to run and/or create new reports to monitor data quality and completeness, and for those who are interested, we will finish the day with an overview of the Advanced Reporting Tool. We will have time to address advanced topics that you may suggest. Please sign up for these training sessions by sending email to peggy@suburbancook.org.

Policies and Procedures Manual
The Policies and Procedures manual was approved by the board at its September 22 meeting. We will distribute the manual via email.

Backdating
We had a number of questions about backdating. If you will be using the backdating feature, you really don't want to enter any data in that demographics section on the client search screen—it will "disappear" when you change the date to an earlier date. If you want, you can go to Admin Providers-System Configuration-Client Search Configuration and check No to the "Display Client Demographics?" question. Then that demographics screen will not appear on the client search screen. Then when you are in the Cook County Shared MDR assessment, you will need to enter any required data before changing the date and then clicking on "Backdate". Do not save the data before you choose "Backdate". The system will stay in Backdate mode as you enter additional clients until you explicitly choose to return to "Live" mode

Assessment date / Intake date
When you fill out an assessment, there is an assessment date that appears at the beginning of the assessment screen. This date is not saved in any field. It is simply the date that is used to time-stamp the data entered in each of the fields. Some agencies are concerned that there is not then a way to indicate the actual date of the "intake" separately from the date of program entry or service transaction. One possibility is to define a service to track intakes, another is to add a field on the Cook County Shared MDR assessment to collect an "Intake Date". Let us know if you have a need to track intakes, and if so, which method you prefer.

Program Entries

We now have about twice as many clients entered as we have program entries for those clients. Please remember to create at least one "Entry" for each of your clients, indicating which program(s) will be providing services to the client. You do this by clicking on the orange "Entry/Exit" button at the top right corner of the client screen. Be sure to select your program from the Provider picklist and HUD-40118 as the entry type in order to have the client included in the APR for that program.

Data Quality Fields --Social Security Number and Zip Code of last permanent residence

Both of these fields have a corresponding "data quality" field where you can indicate that the client refused or didn't know their data. In these cases, it is all right to leave the data field empty, but you do need to make a selection in the data quality field. We are not penalized for missing data in the data field itself, but we are penalized for not having data in the data quality field.

Click Here to Enter Data as Another Provider

Please DO NOT use this feature as it is found on the right hand side of the top ServicePoint banner. You will be able to select your specific program from a picklist when entering Entries, Service Transactions, or ROI's while entering data as your level 1 provider.