

HMIS@NCCEH System Updates

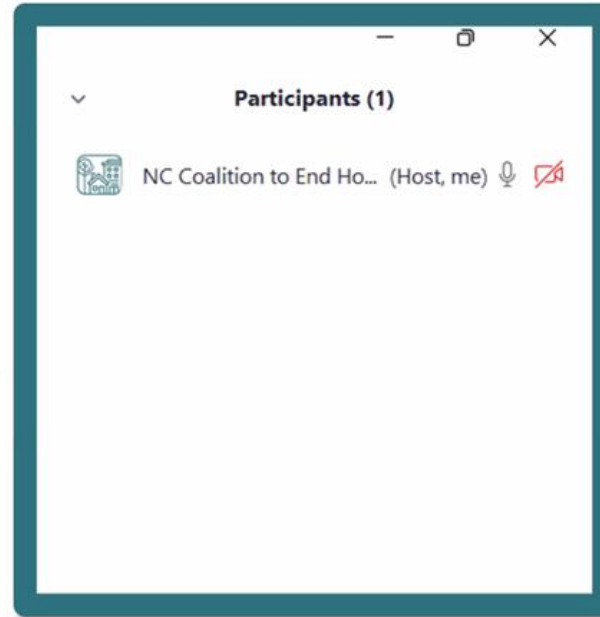
May 2026



NC COALITION to end
HOMELESSNESS

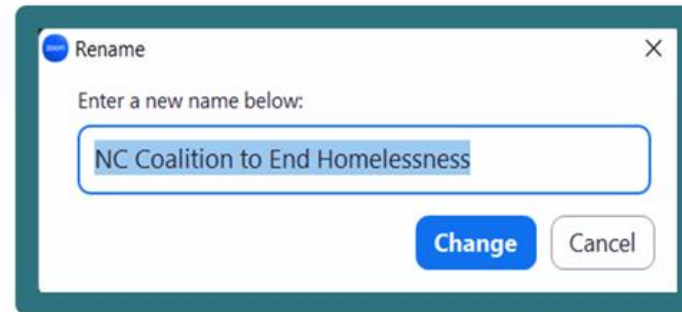
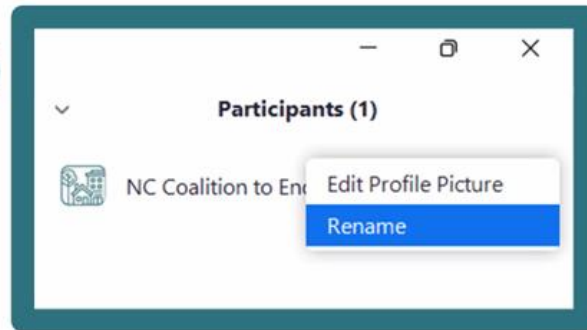
Edit your Zoom Screen Name!

1



*How to change your
screen name:*

2



What do you call a prankster chicken?



A practical yolker!

Agenda

May 2026

System Updates

- Name Change
- A020 Submission Deadline Passed
- Data Quality Review – May After Data Clean Up

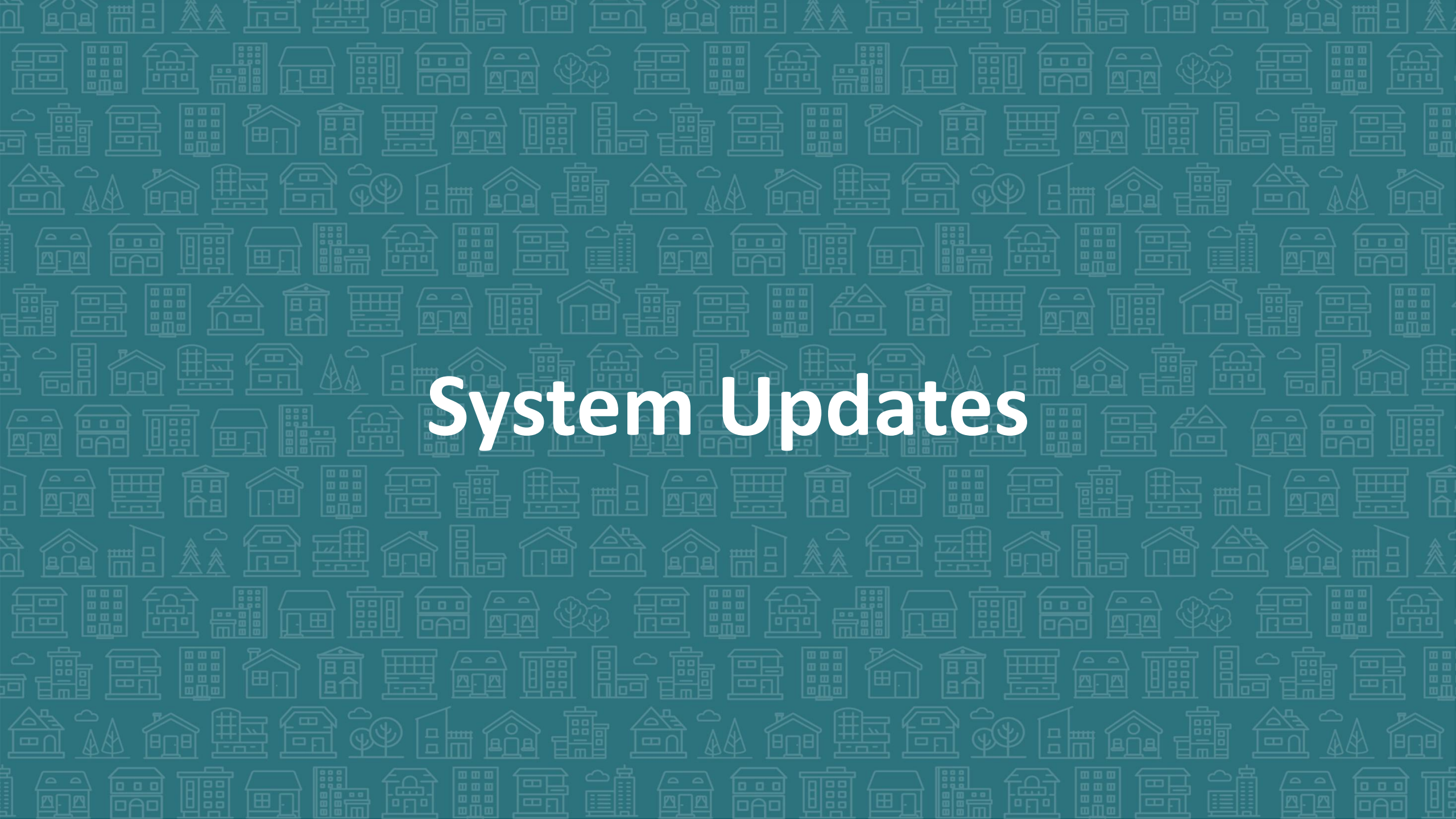
Training and Resources

- What is Personally Identifiable Information (PII)
- Data Team Communication
- HMIS Learning Management User Training
- April Monthly Training Recap: Service Transactions
- ZenGuide Knowledge Base Highlight

What's Next?

- May Monthly Training: Self-Sufficiency Matrix
- Bringing it Home 2026

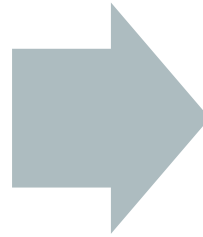
Questions/Concerns?

The background of the image is a solid teal color, overlaid with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, multi-story apartment blocks, and industrial-style structures, as well as some stylized trees. The pattern is dense and covers the entire background.

System Updates

NCCEH Data Team

Data
Center



Data Team

Thank you for your patience as we work through correcting public documents!



NCCEH

THANK you so MUCH



NCCEH

Data Quality Review

We will start reporting on Data Quality month by month so you all can visualize your progress in the HMIS system

We are hoping that this will:

- Reassure yourself in your work
- Empower you to keep improving your data
- Stimulate discussion among team members



Data Quality Review – May – After A020 Data Clean up

You served 1889 more clients over the last month!

Data Improvements:

- SSN
- Disability at Entry
- Relationship to HOH

Elements to work on:

- Enrollment CoC
- Relationship to HOH
- NC County of Service
- Housing Move-in Date
- DV Series

Data Element	Change	Corrections Made
Social Security Number		-439
Date of Birth		-75
Disability (Entry)		-174
Project Start Date / Project Exit Date		-62
Destination (Exit)		-554
Chronic Homelessness Calculability		-73
Residence Prior to Project Entry		-65
NC County of Service		-226
Domestic Violence Series		-268
Have you ever experienced domestic violence?		-69

View the [HMIS@NCCEH Data Quality Benchmarks](#) page for benchmarks by project type. Keep running your reports to identify client errors!

The background of the slide is a solid teal color with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, apartment complexes, schools, and commercial structures, arranged in a dense, staggered grid.

Training and Resources

What is PII?

PII (Personally Identifiable Information)

- **Examples of PII:**

- Full name
- Social Security Number (SSN)
- Date of Birth
- Phone number
- Email address
- Home address
- Client ID or HMIS ID (when linked to a person)

- **Avoid PII Risk:**

- Access only what you need
- Verify who you are sharing with
- Use secure systems (HMIS only)
- Do not email or store PII in personal files
- Lock/log out when away

Examples of Most Recent Breaches:

If PII Risk Happens:

- Report it immediately
 - Notify your supervisor / HMIS Lead
- Document what happened
 - Internally and Submit a PII/ Security Breach form





WARNING

1

DAYS WITHOUT PERSONALLY IDENTIFYING
INFORMATION EXPOSURE

The background of the slide is a solid teal color with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, multi-story apartment buildings, and industrial structures, as well as some trees. The pattern is dense and covers the entire background.

Data Team Communication

We Love to Hear From You!



- **Agency Administrator Responsibilities**
- **When to Contact the Data Team**

When to Contact the Data Center

- **Project Changes**

- New
- Closing
- Questioning?!

- **Funding Changes**

- New Source
- Ending
- Transferred
- Consolidated

- **Staff Changes**

- New
- Resigned or Terminated
- Position Change

- **Questions**

- Data Standards
- Data Entry/Workflow
- Reporting
- HMIS Compliance
- *Anything!*



Agency Administrator Responsibilities

Primary Contact

- Emails, meetings, signing documents, running and submitting reports
- Provide first-responder support for HMIS end users in your agency
- Notify all members at your agency of any system-wide changes and other relevant information

Privacy and Security

- Ensure client privacy, security, and confidentiality in alignment with current privacy policies and procedures
- Notify the Data Center of any pending or new Sharing Agreements or MOUs
- Notify the Data Center of any HMIS personnel changes within 3 business days via the appropriate form (inactivation, new license etc.)
- Report privacy or security breaches and concerns to the Data Center



Agency Administrator Responsibilities Cont'd

- Data Quality
 - Ensure Annual Training Requirements are completed by all end users
 - Maintain data quality standards in alignment with the HMIS and CoC policies, and the HMIS Data Quality Plan
 - Communicate changes to Bed and Unit Inventory and location to comply with HUD Standards
 - Ensure that end users are using the current HMIS related forms and workflow
 - Run data quality reports at least monthly to check client data and work with agency users to make needed corrections.

AA Common Forms

- [License Request Form](#)
 - [Inactivation Request Form](#)
 - [Using BusinessObjects 101](#)
- More Information Here
 - [Video: Agency Administrator Roles and Responsibilities](#)
 - [Slides: Agency Administrator Roles and Responsibilities](#)
 - [UPDATED BusinessObjects Introduction Training](#)





HMIS Learning Management User Training

New User Training

- **All HMIS@NCCEH New User Training must be completed within 30 days.**
- **Learning Management Site**
 - Start Here
 - Privacy and Security
 - User Agreement (Data Team must review before next section of training will be unlocked)
 - Training Courses (assigned based on Agency Project Assignments)
- **HMIS Training Site – Workflow Test**
 - Create new Test Client(s)
 - Complete Client Profile tab for each Client
 - Complete Households Tab
 - Complete ROI tab
 - Complete Entry/Exit tab
 - Project Start Assessment(s)
 - Interim Update Assessment(s)
 - Project Exit Assessment(s)

After Test Clients are created and data entry is complete, Trainee will submit HMIS Client IDs through Formstack for review – Formstack link is in LMS

New User Training Agency Administrator Responsibilities

Expectations of License Requestor

- Requestor should be included on all emails between the NCCEH Data Team and the Trainee during HMIS Training
- Requestor is available to offer Training Support for their Trainee
- If escalation is needed due to Inactivity or poor Data Entry, NCCEH Data Team can reach out to Requestor directly for support
- Requestor should let us know if Trainee no longer needs HMIS Training

New User Training

Trainee Responsibilities

- Expectations of Trainees
 - Complete all HMIS@NCCEH Training within 30 days!
 - Tip: Schedule a work block each day to work on training
 - Communicate with the Data Team!
 - Let us know if you have questions
 - Let us know when you are ready for us to re-check your work

Congratulations to April's New HMIS Users!

- Micaiah Ostrander
- Cindi Bacon
- Vanessa Green
- Ali Mckay
- Bryan Laroe
- Melissa Elliott
- Jack Geist
- Ryan Yergy
- Tara Talley
- Dewane Brown
- Andrew Hershey
- Kimberly Spencer
- Carrie Workman
- Edwina Paschall



April Monthly Training Recap: Service Transactions

Topics Discussed:

- Overview of Service Transactions
- Creating a Service Transaction
- Creating a Case Manager
- Reporting Options
- ZenGuide Resources

The [Slides](#) and [Recording](#) of the training are available on [ZenGuide](#)

ZenGuide Knowledge Base

Your first stop for answers

112 Articles and counting!

- We use your search results to develop new articles

Highlight:

- [Required Computer Skills for HMIS](#)
- 0347 Billing Summary Report – NEW
- [Recording Services in HMIS](#)
- [Dashboard Report: Service Transactions](#)

Bookmark it!

<https://ncceh.zendesk.com/hc/en-us>

HMIS@NCCEH ZENGUIDE

Search



What's Next?

May Monthly Training: Self-Sufficiency Matrix

Join us for the [May Monthly Training](#)!

Agenda:

- Overview of the Measurements Tab
- Reporting

What would you like to see training on? Submit your suggestions in the [Feedback Survey](#)



NCCEH

Bringing it Home 2026

The Data Team will be attending the Bringing it Home Conference from May 27th – 28th

For any non-urgent questions, utilize resources such as:

- [ZenGuide Articles](#)
- [ZenGuide - News Archive](#) - for past training materials
- [Learning Management System](#)
- HMIS Dashboard & Business Objects Reports

Registration closes May 15th!



What's Next Calendar

Due	Event Name
May 20th	Monthly Training: Self-Sufficiency Matrix 10-11am
May 27th-28th	Bringing it Home Conference: Delayed Helpdesk Response
June 3rd	HMIS Systems Updates Meeting 10-11am
June 17th	Monthly Training: Case Plans and Goals 10-11 am
July 1st	HMIS Systems Updates Meeting 10-11am
July 15 th	Monthly Training: TBD 10-11 am
August 5th	HMIS Systems Updates Meeting 10-11am

Go to ncceh.org/events-trainings/ for all event details!





Questions?

Let's Troubleshoot!

Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997



NCCEH