

HMIS@NCCEH System Updates

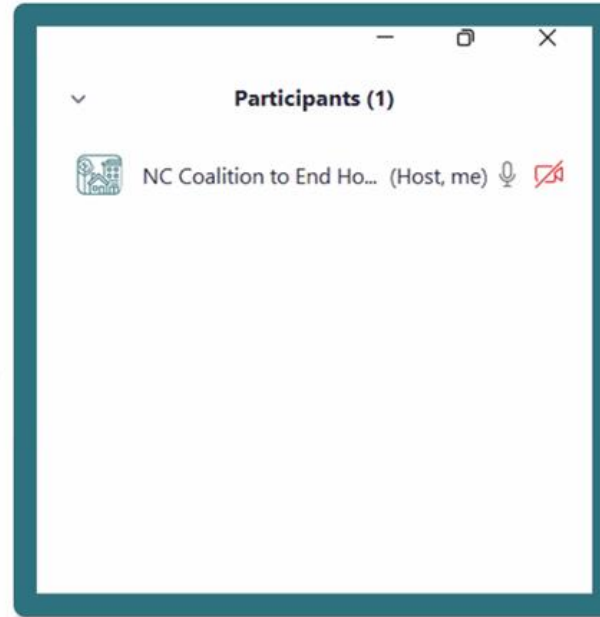
July 2026



NC COALITION to end
HOMELESSNESS

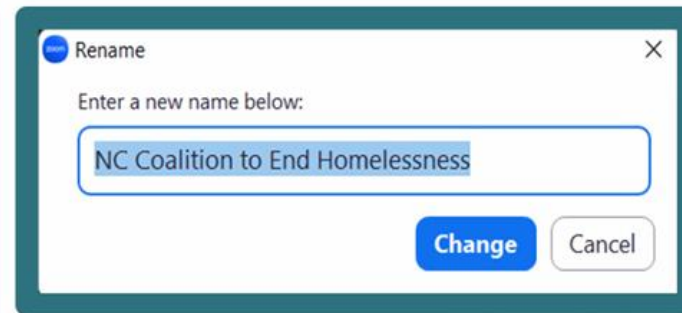
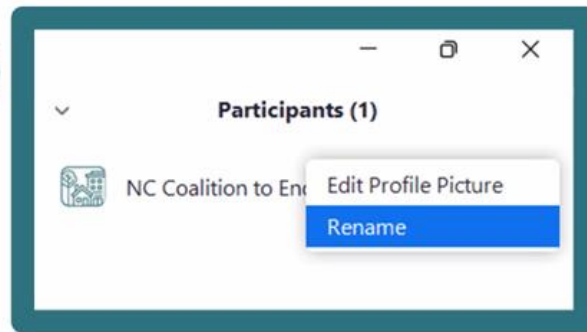
Edit your Zoom Screen Name!

1



*How to change your
screen name:*

2



What's the difference between a duck and George Washington?



One has a bill on his face, and the other has his face on a bill.

Agenda

July 2026

System Updates

Location changes

- NC County of Service -> County/Parish
- Lease Date, Lease Zip Code, and Housing Move-In Date

HMIS Help Text Updates

Data Quality Monitoring Plan

- Monthly Data Quality Review
- July A020 Submissions are Underway!

Training and Resources

Helpful Forms and Where to Find Them

Monthly Reminder!

- PII Warning
- HMIS Learning Management User Training
- Sending a Question to the Data Team
- June Monthly Training Recap: Case Plans & Goals

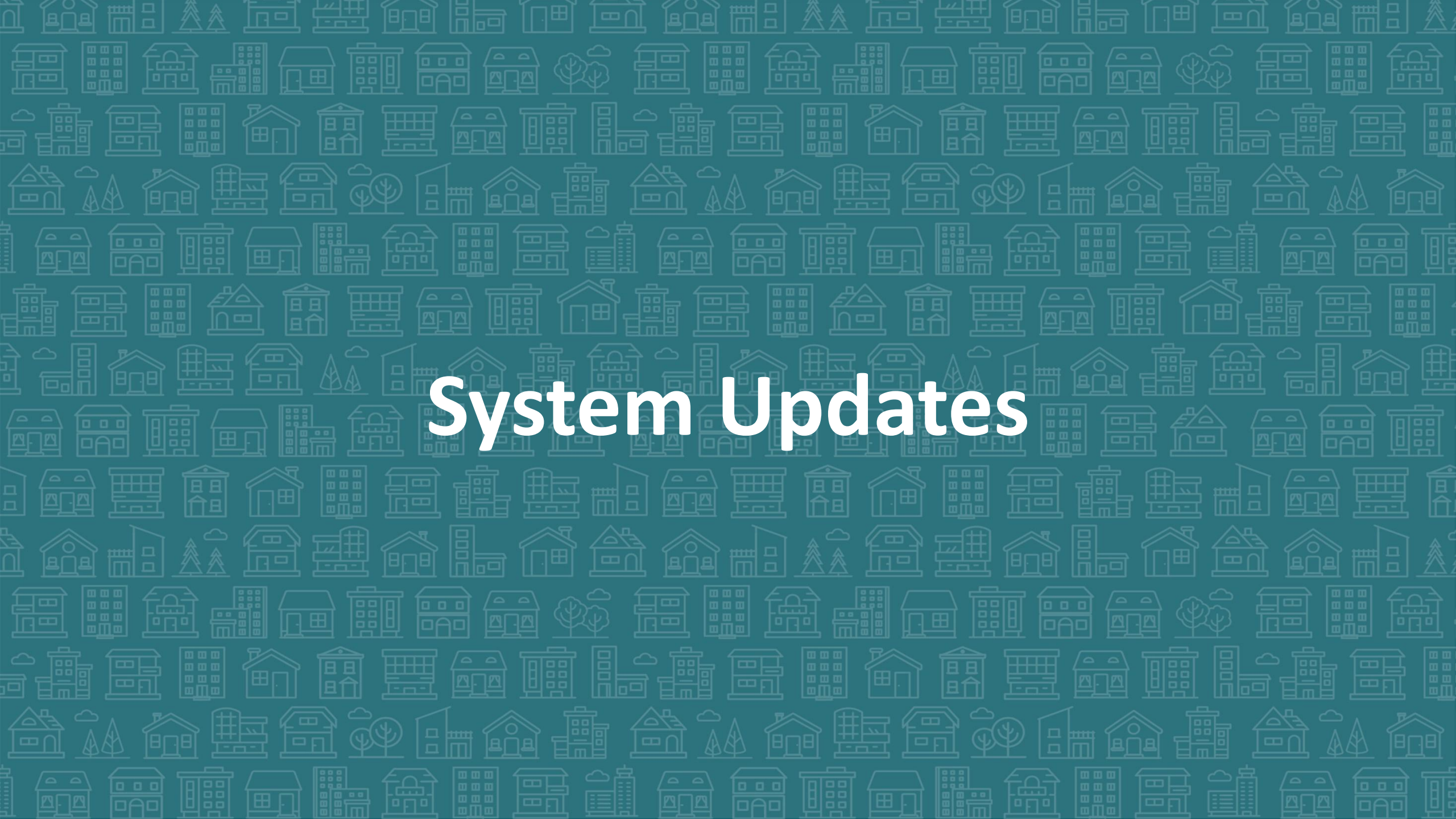
ZenGuide Knowledge Base Highlight

What's Next?

- July Monthly Training: Winter Shelter Planning

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 structures, as well as some stylized trees. The pattern is dense and covers the entire background.

System Updates

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 – June - July

An Increase of 1601 clients over the last month!

Data Improvements:

- Disability at Entry
- Relationship to HOH

Elements to work on:

- SSN
- Enrollment CoC
- Relationship to HOH
- NC County of Service
- Destination at exit
- DV Series

Data Element	Change	Corrections Made
Social Security Number		-239
Disability (Entry)		-132
Relationship to Head of Household		-78
Project Start Date / Project Exit Date		
		-109
Enrollment CoC		-51
Chronic Homelessness Calculability		-69
Residence Prior to Project Entry		-54
NC County of Service		-227
Domestic Violence Series		-72
Have you ever experienced domestic violence?		-39

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

NC County of Service > County/Parish

Currently, "NC County of Service" is recorded for each Client in HMIS as of their Project Start Date.

NC County of Service (retired)	Burke	▼	G
Zip Code (of Last Permanent Address, if known)	28043	...	G

Starting on July 1st, "NC County of Service" will be retired and "County/Parish" will need to be collected and entered in HMIS for every Household at Project Start/Entry.

Entering County/Parish (new enrollments)

Edit Project Start Data - (1076869) Knope, Leslie Barbara



Household Members

i To update Household members for this Entry Data, click the box beside each name.

☒ (151464) Two Parent Family (married w/children)

- ☐ (1076869) Knope, Leslie Barbara (Entry Date: 06/01/2026 2:00 AM)
- ☒ (1076873) Knope-Wyatt, Sonia (Entry Date: 06/01/2026 2:00 AM)
- ☒ (1076871) Knope-Wyatt, Stephen (Entry Date: 06/01/2026 2:00 AM)
- ☒ (1076872) Knope-Wyatt, Wesley (Entry Date: 06/01/2026 2:00 AM)
- ☒ (1076870) Wyatt, Ben (Entry Date: 06/01/2026 2:00 AM)

Include Additional Household Members

Edit Project Start Data - (1076869) Knope, Leslie Barbara

Provider	Heading Home - Multiple BoS Counties - Rapid Re-Housing - HUD (21106)		
Type	HUD		
Project Start Date *	06 / 01 / 2026	  	2 : 00 : 00 AM
County	Rowan, NC	Select County/Parish	Clear

Save & Continue

Cancel

Steps for Entering

- Set EDA/Back Date mode to Project Start
- Search for Client
- Navigate to "Entry/Exit" tab
- Click "Add Entry/Exit"
- Make sure that the boxes next to each household member being enrolled are checked
- Choose Enrollment Type
- Click "Select County/Parish"

Entering County/Parish (new enrollments)

Search County/Parish

County/Parish Search

Filter by State

North Carolina (NC) ▼

Search by Name

Rowan

Search

Clear

County/Parish Search Results

County/Parish ▲	State
+ Rowan	North Carolina (NC)

Showing 1-1 of 1

Exit

Steps for Entering

- Filter by state
- Search by Name
- Click "Search"
- Click on the green plus sign next to the county this Client is being served in
- Click "Save & Continue" to continue entering HMIS Project Start Enrollment data

Updating County/Parish (open enrollments)

Edit Project Start Data - (1076869) Knope, Leslie Barbara



Household Members

i To update Household members for this Entry Data, click the box beside each name.

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Type	HUD		
Project Start Date *	06 / 01 / 2026	  	2 : 00 : 00 AM
County	Rowan, NC	Select County/Parish	Clear

Save & Continue

Cancel

Steps for Entering

1. Set EDA/Back Date mode to Project Start
2. Search for Client
3. Navigate to "Entry/Exit" tab
4. Click the Edit Pencil next to the Current Enrollment Project Start
5. Make sure that the boxes next to each household member being enrolled are checked to be included in the update
6. Click "Select County/Parish"

Updating County/Parish (open enrollments)

Search County/Parish

County/Parish Search

Filter by State

North Carolina (NC) ▼

Search by Name

Rowan

Search

Clear

County/Parish Search Results

County/Parish ▲	State
+ Rowan	North Carolina (NC)

Showing 1-1 of 1

Exit

Steps for Entering

1. Filter by state
2. Search by Name
3. Click "Search"
4. Click on the green plus sign next to the county this Client is being served in
5. Click "Save & Continue" to continue entering HMIS Project Start Enrollment data

County/Parish Data Clean-up

- The information that was entered in HMIS for "NC County of Service" has automatically been transferred into the "County/Parish" field
 - If "NC County of Service" was not collected for a Client in your project, "County/Parish" will appear as "missing". To correct this, you will have to add the location information in HMIS as of the Project Start date
- Data clean-up for County/Parish should be completed for all active clients by October 1st. Your agency should review current clients and confirm accuracy for copied data or add the information for enrollments that are missing it.
- The County/Parish field will be added to the A020 report by August 1st.

Lease Start Date

- This is the date that their new rental lease agreement starts
 - Different from Housing Move-In Date (which is the date they actually sleep in their new residence).

Answer the questions below for the Head of Household and other adults

Enrollment CoC	-Select-  
Lease Start Date	/ /    
Lease Zip Code	
Housing Move-in Date	/ /    

- The Lease Start Date and Lease Zip Code were requested by our Permanent Housing providers so that the whole story of a Client's journey into housing can be told
- The Lease Start Date and Lease Zip Code will not be included in the A020 report because the Data Quality Plan does not require it

Lease Zip Code

- This is the Zip Code of the new permanent housing residence for the household.
 - Could be different from Zip Code of last permanent address (which was their previous location)
 - Will be added to Housing Inventory Count reports for 2027!

Answer the questions below for the Head of Household and other adults

Enrollment CoC	-Select- ▼ G
Lease Start Date	___/___/___    G
Lease Zip Code	___ G
Housing Move-in Date	___/___/___    G

- The Lease Start Date and Lease Zip Code were requested by our Permanent Housing providers so that the whole story of a Client's journey into housing can be told
- The Lease Start Date and Lease Zip Code will not be included in the A020 report because the Data Quality Plan does not require it

Housing Move-in Date

- This is the first date that they actually sleep in their new residence.
 - Different from Lease Start Date (which is the date their new rental lease agreement starts)

Answer the questions below for the Head of Household and other adults

Enrollment CoC	-Select- ▼ G
Lease Start Date	/ /    G
Lease Zip Code	G
Housing Move-in Date	/ /    G

- HUD requires this be entered at the point the household moves into a permanent living situation, whether subsidized by the currently enrolled project, a different PH project or subsidy, or without any subsidy at all

HMIS Help Text Updates – DV Series

Domestic Violence Series
Descriptions have been updated!

Other descriptions will take a
while to update as we will need to
perform a bulk upload

Domestic Violence	
Survivor of Domestic Violence	
If Yes for Survivor of Domestic Violence, When experience occurred	
If Yes for Survivor of Domestic Violence, Are you currently fleeing?	

Question Description ✕

 HUD's definition of "Domestic Violence" includes dating violence, sexual assault, stalking, human trafficking, and other dangerous or life-threatening conditions against the client or family member that make the primary nighttime residence a safety risk.

OK

HMIS Help Text Updates – Current Living Situation

The Data Team is looking to update language related to HMIS Data Elements to ensure help text is clear to all.

We will continue to suggest and apply updates to language in future meetings!

Current Living Situations

Current Living Situation	
Start Date *	___/___/___    G
End Date *	___/___/___    G
Information Date *	___/___/___    G
Current Living Situation *	-Select-  G
Living situation verified by *	Lookup Clear G
Location details	G
Continue only IF Living Situation is NOT "Place not meant for habitation" or "Emergency Shelter"	
Is client going to have to leave their current living situation within 14 days?	-Select-  G

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, industrial structures like factories, and commercial buildings. Some icons also include small trees or clouds, adding to the urban or community theme.

Training and Resources

A020 Submission Form is Open!

What's Required?

- All projects (ES, TH, HP, RRH, PSH, OPH, SO, SSO, CE) active from October 2025 - June 2026
- Reports as clean and accurate as possible
- Submission of the v10 A020 Report

***Will not accept submissions of previous versions**

Submitting your Report

Submissions are due July 31st by 5pm!

Only submit your reports via the [July 2026 A020 Form](#)



A020 - Data Quality Monitoring Report v10

Earlier report runs gives the Data Team time to respond to questions



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Common Errors/Corrections

Required Corrections:

- Missing Annual Assessments
- Relationship to Head of Household
 - Missing
 - Multiple
 - No HOH/child alone
- Missing NC County of Service
- Disability Discrepancies
- Incorrectly ran reports

Accepted with comment:

- SSN
 - Destination
- *Client prefers not to answer & Client doesn't know

A020 Reminders & Resources

Reminders:

- Street Outreach projects should run the D001: DOE before the A020 Report
- Front door provider projects should ignore the NC County errors
- Format should always be Microsoft Excel – Reports
- Utilize the Additional Comments section in the Submission Form

Formats

Microsoft Excel - Reports ✓

Available resources:

- [A020 – Data Quality Monitoring Report](#)
- [Data Quality Plan: Monitoring and Reporting Process](#)
- [D001 Street Outreach DOE Report Guide](#)
- [Monthly Training: Preparing your Data for A020 Submissions](#)
- [Helpdesk!](#)

*Reaching out sooner than later allows us to provide more tailored support to your questions!



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Helpful forms and where to find them

[Project Closure Form](#) - Have an HMIS project your agency no longer uses? Especially important for keeping track of total operational projects and *can* reduce the number of projects to report on during reporting periods. Form can be provided upon request.

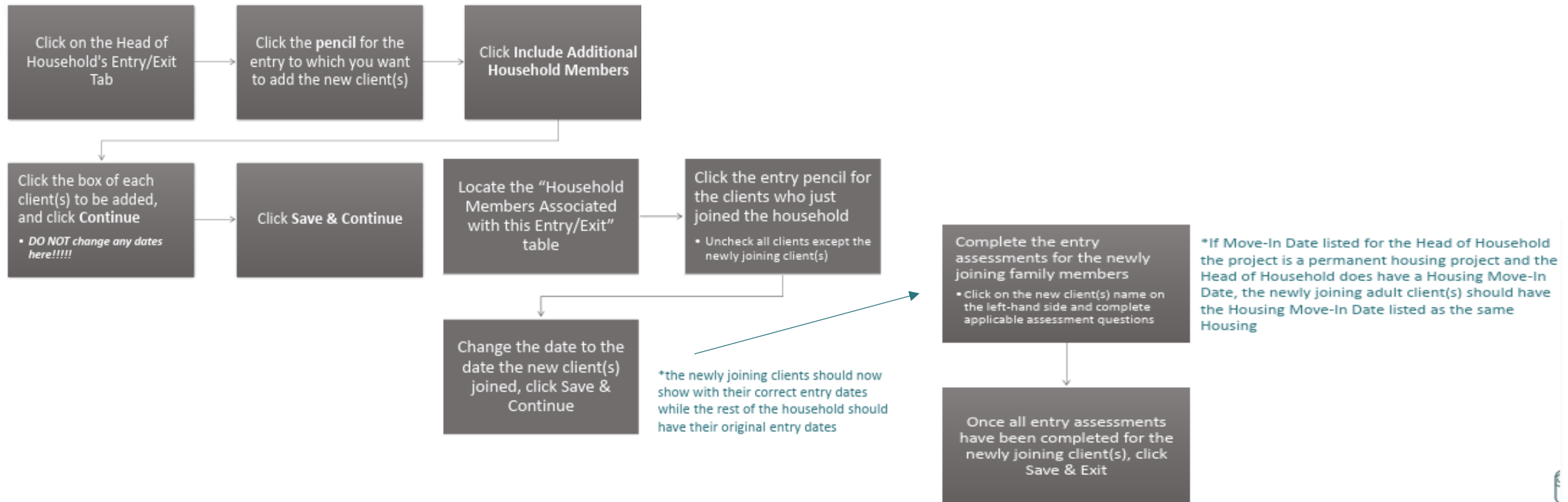
[Client Merge Form](#) - Found a duplicate client in HMIS? The Data Team will determine if the merge can be completed or not. The form can be found in the [Client Profile Merge in HMIS](#) ZenGuide Article.

Its time for your Monthly Reminder!



When adding clients to an existing enrollment, ensure you are following the proper protocol.

- Add your client to the **Entry/Exit Tab, NOT the Household Tab**. Updates to the household tab do not reflect in reports or project enrollments



Its time for your Monthly Reminder!



Check out the following ZenGuides & Trainings to properly add a new client to an existing project enrollment:

- [ClientPoint: Adding Additional Household Members Mid-Stay](#)
- [ShelterPoint: Adding Additional Household Members Mid-Stay](#)
- Hot Topics – Adding Household Members [Recording](#) and [Slides](#)

*Reminder, when exiting clients from an existing enrollment, don't remove anyone from the household tab. The household tab automatically updates itself as clients are added to an enrollment.



WARNING

14

DAYS WITHOUT PERSONALLY IDENTIFYING
INFORMATION EXPOSURE

Congratulations to June's New HMIS Users!

- Ashley Smith
- Tashia Fuller
- Anna Coffey
- Allison Knighten
- James Suber
- Nyia Fozard
- Michele Bennett
- Sarah Knight
- Mary Ann Priester



Sending a question to the Data Team

- Who- should be involved?
- What- does success look like?
- When- is the report/project/task due?
- Where- might staff find the resource?
- Why- do you need this report?



Sending a question to the Data Team Ex.

Hi Data Team Staff,

I'm looking for a report that will look at **who has exited from our RRH project from 1/1/2022 until today (WHAT)**. **We're doing some internal clean up (WHY)** and want to

double check our files against HMIS.

I looked in ZenGuide (WHERE) but couldn't find anything that was a perfect match. I've

cc'd our case managers (WHO) on the email to keep them in the loop. We're looking for assistance or a **report by the end of the week (WHEN)**. Do you think that's possible?

Thanks!

June Monthly Training Recap: Case Plans & Goals

Topics Discussed:

- Deep Dive into Case Goals
- How to Assign a Case Manager
- How to follow up with client goals using the Follow-up List
- Reporting using Counts Report and Business Objects

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

ZenGuide Knowledge Base

Your first stop for answers

114 Articles and counting!

- We use your search results to develop new articles

Highlight:

- [HMIS Data Entry: County/Parish](#) - NEW
- [Writing Quality Case Notes](#) - NEW
- [ClientPoint: Adding Additional Household Members Mid-Stay](#)
- [Self-Sufficiency Matrix](#)
- [Case Management: creating and managing case plan goals](#)
- [Assigning and Removing Yourself as a Case Manager](#)
- [Required Computer Skills for HMIS](#)

Bookmark it!

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



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 structures, as well as some stylized trees. The pattern is dense and covers the entire background.

What's Next?

July Monthly Training: Winter Shelter Planning

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

Agenda:

- Are you planning for winter ad hoc/temperature based shelter?
- Are you planning for a low-barrier shelter option are worried that data collection will be too sensitive?

Join us for a training on a different kind of Emergency Shelter HMIS set up!

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



NCCEH

What's Next Calendar

Due	Event Name
July 1st	A020 Data Quality Report Submission Form Open
July 3 rd	NCCEH Closed: Observed for July 4th
July 15 th	Monthly Training: Winter Shelter Planning 10-11 am
July 31 st	A020 Data Quality Report Due By 5 pm
August 5 th	HMIS Systems Updates Meeting 10-11am
August 7 th	A020 Data Quality Report Submission Form Closes
August 19 th	Monthly Training: TBD 10-11 am
September	Annual HMIS Training Requirement

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



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Questions?

Let's Troubleshoot!

Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Team Help Desk

hmis@ncceh.org

919.410.6997

