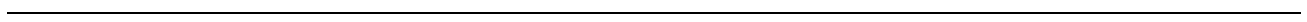


Adaptive Case Management Manual 2018



Adaptive Case Management

Adaptive Case Management (ACM) offers client directed, flexible supports with financial assistance for those experiencing homelessness to secure and sustain housing. ACM targets individuals or families with services adapted to the needs and wishes of the client at any given time in the program (e.g. the client at any given time may require more support during the first three months while they are securing and establishing their new home). The amount of case management received is directed by client choice but also negotiated with and by the service provider. This program does not assume all high risk clients require extensive services, rather all clients have the ability to choose their own level of service to secure and maintain their housing with an unbiased and flexible Case Manager to negotiate this relationship.

This program is designed to meet the needs of the client wherever they are at in the process of achieving housing stability. The intensity of the intervention will increase or decrease accordingly to client need, client wishes and Case Manager capacity.

ACM is also distinguished by the potential to deliver a fee-for service funding model. All financial supports as well as case management hours are tracked for the purpose of funding on a client by client basis and billed to the funder at regular intervals, allowing service-providers to manage caseloads based on funding.

Frequently Asked Questions

What is Adaptive Case Management (ACM)?

Adaptive Case Management offers client-directed flexible supports with financial assistance for those experiencing homelessness to secure and sustain housing. This approach targets any acuity of individual or families with services adapted to the needs and wishes of the client.

What are Client Costs?

Client costs are issued on a fixed basis (per housed family per month) in the amount of \$715. This fixed amount includes all housing support costs such as rent/utility subsidies, unit maintenance and repair, and an allowance for operational and administrative costs. Agencies are encouraged to maximize this fixed cost rate by minimizing the amount of rent/utility subsidies clients require – where possible – thereby helping clients transition more easily to a state of self-sustainability.

What is Move-In and Set-Up (MISU) and Damage deposits (DD)

MISU and DD is a one-time fee per family and agency can invoice CHF with a fixed rate of \$2500 per family.

- a. This can exceed actual move-in and damage deposit costs, but will still only be issued once per client/family
- b. It is expected any excess funds received this way will be committed to building up a reserve for future ACM needs

MISU eligible items include but are not necessarily limited to (please use your best judgment): beds and bedding (linens, blankets, pillows, etc.), toiletries, cookware, dishes, utensils, and phones (landline or cell). Agencies are encouraged to purchase these goods lightly used whenever possible.

It is expected that all damage deposits be collected by the program from the relevant landlords as they are retrievable and that all funds collected under it are ultimately committed to the maintenance and repair of client units.

What is an Additional Cost Request?

Additional Cost Request is designed primarily for one-time costs. For example, additional MISU cost occurs due to family needs such as big family size. Additional Cost Request need to be approved by the System Planner in order to be included in the invoice. Please send your Additional Cost Request form to accountspayable@calgaryhomeless.com and title Additional Cost Request.

What does Case Management look like under ACM?

The amount of Case Management provided is directed by client choice and negotiated by the service provider. This program does not assume clients require extensive services, rather, that all clients have the ability to choose their own level of service to secure and maintain their housing with an unbiased and flexible Case Manager to negotiate this relationship. When Case Management is provided the program is expected to adhere to the principles and intentions of the Case Management Standards. It is expected that Case Management needs will be assessed at three-month intervals with the goal of moving clients to self-sustainability while reducing dependence on supports and services.

How can I participate in Adaptive Case Management as an agency?

Agencies must have an Adaptive Case Management Funding Agreement with the Calgary Homeless Foundation (CHF) to be eligible to receive clients under the ACM approach. If you currently do not hold an ACM Funding Agreement and would like to participate in ACM, please contact your System Planner for future opportunity.

How are clients triaged to ACM?

The triage follows Coordinated Access and Assessment (CAA) Family Placement Committee (FPC) Term of Reference. The ACM openings will be scheduled for every quarter. It will be most likely scheduled during the month of February, May, August, and November.

What must the ACM invoice include?

Each monthly invoice will include details reflecting unique family ID#, fixed rate costs and hourly services provided during the billing month, and Move-In and Setup and Damage Deposit if applicable.

Can I use my own agency's invoice template?

Yes, you can use your own agency's invoice template as long as the required items are included.

What costs are eligible for invoicing?

Please refer to CHF's Eligible Cost Guidelines to see what kinds of costs CHF can consider eligible for staffing, client, and admin costs.

What are considered Case Management Costs?

Case Management is billed hourly at a rate of \$40/hour to a maximum amount of \$960 or 24 hrs/month/client.

Case Management hours can include both direct and indirect hours as long as indirect hours do not exceed direct hours (greater than a 60/40 direct-to-indirect ratio of billable hours is strongly preferred).

It is expected that typically, most clients will not require the maximum amount of service and that service hours will decline over time.

It is recognized that clients may require additional supports from time to time; agencies are expected to escalate service levels to ensure clients remain housed.

What if the service fee provided by the agency is less than the fixed Client Costs rate?

Agencies will be provided the fixed rate of \$715 and are encouraged to maximize this fixed rate.

What if the service fee needed by the agency is more than the maximum service rate included in the Fee Schedule?

Agencies are expected to be creative within the Fee-for-Service funding model. The service rates are calculated based on average housing and client costs across CHF-funded housing programs. Agencies will need to be mindful about these considerations when taking on future clients. In some cases, as described earlier, unspent service fees accrued from other clients might be used to offset the higher service fee costs of future clients.

Can I invoice more than one time MISU and DD when I rehouse clients?

No, MISU and DD are one-time fees. Damages and unit repair are calculated in client costs already.

When can I invoice for ACM?

The invoice can only be issued at the end of each month, and client costs may only be paid after a family is housed. Case management hours that fall within the maximum amount for each month may be invoiced up to 60 days before the family is housed.

Timeline to submit invoice is 30 calendar days after each month. 15 calendar days for the last month of each fiscal year (in April for March)

Agencies are required to submit the invoice and HMIS ACM monthly report together to accountspayable@calgaryhomeless.com (please cross reference with the invoice before submission).

Who should I send the invoice to?

accountspayable@calgaryhomeless.com

Does the agency need to attach any receipts with the invoice?

No, you don't need to attach any receipts with the monthly invoice. However, all invoice backup/verification documents should be kept for the purpose of spot auditing and program monitoring.

Is accreditation required for the ACM program?

Accreditation is not required for ACM. However, agencies should be able to meet agency accreditation requirements in order to have an ACM Funding Agreement with CHF. ACM Annual Review will serve to replace the program accreditation.

When can agencies receive payment?

Payments to agencies will be made within 30 days of receipt of the agency's invoice and all program reporting and information has been completed.

How is the program being monitored?

Program is monitored through monthly review of agency invoicing, quarterly program review, and annual program review. ACM Key Performance Indicators will match and be monitored like family housing programs as defined in the Family System Planning Framework.

SCHEDULE "B"

Fee Schedule: Adaptive Case Management

An adaptive case management program type focuses on the type and amount of services that are provided to support a participating family to achieve housing stability and housing independence.

1. Fee Schedule:

Recurring Fees (per Client per Month)		
Case Management Costs, billed hourly at actual hours incurred		\$40/hour
Client Costs, fixed rate (see note 1)		\$715 per client

One-Time Fees (per Client)		
Move-In and Setup (see note 1)		Up to \$1,000
Damage Deposit (see note 1)		Up to \$1,500

Note 1: Subject to Eligible Costs Guidelines

2. Definitions:

- (a) **"Case Management Costs"**–Case Management is billed hourly at actual hours incurred. Up to a maximum of 24 hours may be billed in any one month for any one client; any additional hours require the written approval of CHF.
- (i) Rates are based on average staffing costs across CHF-funded programs and already include an allowance for operational and administrative costs.
 - (ii) While a client is "referred" (as per the CAA Family Placement Terms of Reference) into an ACM program and has not yet exited:
 - Agencies may bill CHF for case management hours incurred up to 90 days before that client is housed with ACM.

- Agencies may bill CHF for case management hours incurred up to 90 days after that client was last housed within ACM.
- (b) **"Client Costs"** – Client costs are issued on a fixed basis per housed family per month, and include all of the other support costs such as rent/utility subsidies, unit maintenance and repair, and an allowance for operational and administrative costs.
- (i) Rates are based on average housing, client, and associated administrative costs across CHF-funded programs.
 - (ii) Client Costs are eligible for the entire month even if the family is housed late in the month or leaves early.
- (c) **"Move-In and Setup"** - as per Eligible Cost Guidelines

3. Invoicing Guidelines:

- (a) Fees are payable monthly. Fees are to be invoiced at the end of each month, not in advance.
- (b) Invoices need to include the following five details for each family:
- (i) Unique family ID# - indicating all costs for the unique family ID#
 - (ii) Case Management Costs (as defined in the Fee Schedule)
 - (iii) Client Costs
 - (iv) Move-In and Setup (if applicable) – once per family up to the maximum in the Fee Schedule
 - (v) Damage Deposit (if applicable) – once per family up to the maximum in the Fee Schedule
- (c) Submit invoices by email with ACM Invoice subject line to: accountspayable@calgaryhomeless.com

4. Financial Monitor

Backup documentation for all costs shall be maintained by the agency for each invoice submitted. The Foundation reserves the right to review that documentation at any time.

Appendix 2: Schedule "C"

SCHEDULE "C"

PROGRAM TYPE ASSESSMENTS, PROGRESS REPORTING REQUIREMENTS, PROGRAM MONITORING AND EVALUATION

Capitalized terms used herein and not otherwise defined shall have the meaning ascribed to them in the adaptive case management program funding agreement to which this Schedule "C" is attached and forms a part of (the "**Agreement**"), between the Foundation and the Agency.

1. PROGRAM TYPE ASSESSMENTS

Depending on your program type, the following HMIS assessments will be required for your monthly progress reporting. For further information on the data collection frequency and data quality requirements, please contact CHF HMIS team at hmis@calgaryhomeless.com.

<input checked="" type="checkbox"/> Client Record, Demographics and UDE	<input type="checkbox"/> Support Services	<input type="checkbox"/> Prevention
<input checked="" type="checkbox"/> Housing First Reports	<input type="checkbox"/> Outreach	
<input type="checkbox"/> Emergency Shelter <input type="checkbox"/> Shelter Intake	<input checked="" type="checkbox"/> CHF Housing Assessment	
<input type="checkbox"/> Other -		
<input type="checkbox"/> Comments -		

Please note: Reporting criteria may be subject to change during the term of this Agreement.

2. PROGRESS REPORTING REQUIREMENTS

Report	Report due
Required Monthly Advanced Reporting Tool (" ART ") report(s) - (see Note 1)	Monthly, on the 10 th business day after the end of the previous month
Quarterly Program Overview	Quarterly, presented at Family Placement Committee.
Program Final Report - (see Note 2)	Annually by June 30
Completed Housing Stability Surveys (see Note 3)	Annually by October 31

Note 1: Monthly Progress Reporting will be completed in Calgary Homelessness Management Information System and the ART reports, or Foundation approved alternative, supplied monthly.

Required ART reports for your program type can be found on the CHF webpage:

<http://calgaryhomeless.com/content/uploads/ART-Requirements.pdf>

ART reports or Foundation approved alternative must be submitted to

iheartdata@calgaryhomeless.com by 10th business day of each month for the month prior.

Note 2: Program Year End Report will be completed in the template provided by the Foundation staff. The completed template will be addressed and delivered by email to your CHF System Planner by June 30th, for the prior fiscal period.

3. PROGRAM MONITORING AND EVALUATION

Foundation staff will conduct routine reviews with your agency regarding Program progress and functioning and to analyze program outcomes, consistent with the Foundation's System Planning Framework (a copy of which may be obtained at www.calgaryhomeless.com). Information gathered during the monitoring and evaluation of a Program will be used to improve system knowledge and coordination and will inform evidence-based decision making.

Program monitoring includes, but is not limited to, the following tools used to measure and evaluate Program performance:

Monthly Review of Agency Invoicing

As per section 3. Invoicing Guidelines as defined in Schedule "B", the Agency is required to submit invoices monthly with detailed client costs. Foundation staff will review invoices to ensure alignment with Program Data and the Terms and Conditions found in this Agreement.

Quarterly Analysis

- HMIS – review of Program data and Key Performance Indicator Goals

Evaluative Scorecard Process

At times during the Term, all Foundation funded Programs are grouped together considering sub-population, acuity and program type and evaluated within the following categories: Percentage of Clients who remain Consecutively Housed, Percentage of Clients who Graduated, Percentage Occupancy, Percentage Housed, Financial Variance, Contract Compliance, Participation in CAA, Percentage of Cancelled and Declined Referrals, Average Days between Program Referral and Program Entry, Strategic Fit, Age of Program, Compliance and Agency Health. This is an internal review completed by Foundation staff.

Community of Learning

As a part of the evaluative process, CHF will hold a Community of Learning opportunity during CAA Family Placement and the Agency will present an overview of program's progress and key learnings which may include:

- # of families in the ACM program
- # of case management hours changes in general
- Case management requirement status
- Program successes, challenges, and lessons learned

Annual Program Review (APR)

The APR is an opportunity for dialogue with your Agency and CHF to engage in reflection on a program's strengths and successes and areas that can be enhanced. The Quarterly Analysis, Evaluative Score Card and Final Report (outlined in section 2. Progress Reporting Requirements above) will be used to inform conversation at the APR. Individual client data (with client identifiers, not names) must be available for the APR at the request of the Foundation. In addition, reviewers may require access to a list of staff, clients, and/or partners in which to contact for surveys, focus groups, and interviews pertaining to the Program.

The ACM program APR also includes a process to review congruency to Case Management Standards.

Any reports generated by the Quarterly Analysis and the APR will be provided to the Agency. Additionally, action plans may be generated to address areas for development with agencies throughout the year (remediation), or as a result of the quarterly analysis or APR.

External Program Evaluation by Foundation Hired Consultant, as applicable

Individual client data (with client identifiers, not names) must be available for these reviews at the request of the Foundation. In addition, external Program Evaluation may require access to a list of staff and/or partners in which to contact for surveys, focus groups, and/or interviews pertaining to the Program.

Appendix 3: Sample Invoice

<p>Agency Name</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Name:</p> <p>Address:</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; background-color: #f2f2f2;"> <p>BILL TO</p> <p>Calgary Homeless Foundation Suite 1500, 615 Macleod Tr. SE Calgary, Alberta T2G 4T8 403-237-6465 accountspayable@calgaryhomeless.com</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; background-color: #f2f2f2;"> <p>SHIP TO</p> <p>Calgary Homeless Foundation Suite 1500, 615 Macleod Tr. SE Calgary, Alberta T2G 4T8 403-237-6456</p> </div>	<p>SAMPLE INVOICE FORMAT</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <tr> <th style="width: 50%;">INVOICE #</th> <th style="width: 50%;">DATE</th> </tr> <tr> <td> </td> <td>XX-XX-2017</td> </tr> </table>	INVOICE #	DATE		XX-XX-2017																																
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<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 60%;">DESCRIPTION</th> <th style="width: 20%;"></th> <th style="width: 20%;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td colspan="3">HMIS Family ID:</td> </tr> <tr> <td colspan="3">Case Management Costs</td> </tr> <tr> <td>Case Management Hours@ Fixed Rate</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td>\$40/hour Total Case Management</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td colspan="3">Other Costs</td> </tr> <tr> <td>Client Costs @ fixed</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td>rate of \$715 Move-in</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td>and Setup Costs</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td>Damage Deposit</td> <td></td> <td style="text-align: right;">-</td> </tr> <tr> <td>Total for Family ##</td> <td></td> <td></td> </tr> <tr style="background-color: #f2f2f2;"> <td>TOTAL</td> <td></td> <td style="text-align: right;">-</td> </tr> </tbody> </table>		DESCRIPTION		AMOUNT	HMIS Family ID:			Case Management Costs			Case Management Hours@ Fixed Rate		-	\$40/hour Total Case Management		-	Other Costs			Client Costs @ fixed		-	rate of \$715 Move-in		-	and Setup Costs		-	Damage Deposit		-	Total for Family ##			TOTAL		-
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Damage Deposit		-																																			
Total for Family ##																																					
TOTAL		-																																			

Appendix 4: Expense Coverage Request

Adaptive Case Management

REQUEST FOR EXPENSE COVERAGE APPROVAL

Date of Request:	
Request Submitted by:	
Client HMIS #:	
Expense Amount:	
Expense Description:	
Comments:	

The box below is for CHF Designate to complete

CHF Decision re: Approval	Approved ____ Not Approved ____
Comments:	

Process: All expenses requiring pre-approval must be submitted by e-mail to accountspayable@calgaryhomeless.com title Additional Cost Request prior to sending the monthly invoice for reimbursement. Only those expenses that have been approved via an e-mail reply from CHF to a request as per the above can be included in the monthly reimbursement invoice.

Appendix 5: Case Management – Direct and Indirect Services

Case Management – Direct and Indirect Services

	Activity Title	Activities Included
Direct	Case Conference about Family(D)	Includes any direct (face to face) contact with support providers, schools etc., regarding the family when the family is not present.
	Case Conference with Family(D)	Includes any direct (face to face) contact with support providers, schools etc., when the family is present.
	Connecting to Community Resources(D)	Any contact you make with resources applicable to family intervention and treatment plan.
	Crisis Support(D)	To be used if you are providing unscheduled support to your family for a specific situation.
	Family Skills(D)	When you are working with the family to teach, coach and/or model skills.
	No Show(D)	If your family doesn't cancel a visit within a reasonable time frame: 1 hour if cancelled within 24 hours of the appointment
	Parenting Skills(D)	When you are developing and teaching parenting skills with your families. 1:1 time with the parents.
	Phone Call(D)	To be used when you have a phone call with or about a family (with family, community resource etc.)
	Treatment Planning and Assessment(D)	Developing and updating family Service Plans, complete assessment tools. Case Review and 1:1 supervision about a family.

	Activity Title	Activities Included
Indirect	Consultation(I)	Supervisor consultation and when you are conversing with a colleague about families or work-related items. Supervision that is not about a specific family and family related conversations with peers.
	Paperwork(I)	To be used to document progress of family – Case notes. To be used to document your time spent completing non-family related paperwork (i.e. time sheets, family log, mileage, checking emails, etc.).
	Phone Call(I)	To be used when you are engaged in a non-family related phone call (i.e. colleague).
	Preparation(I)	To be used when you are preparing to attend a scheduled family visit (i.e. planning family visit agenda, getting ready to leave).
	Travel(I)	Used for any work associated travel.

Appendix 6: ACM Billing and HMIS Assessment

Agency Activity	Intake Client	House Client	House/Rehouse Client	On-going Assessment	Exit Client
HMIS Assessment	Intake Assessment	Move-in Assessment	Housing Assessment	3 Month Assessment	Exit Assessment
ACM Invoice	Agency can start bill CHF for services provided to the client (up to 3 months billing Case Management hours before client being housed)	Agency can start bill CHF for fix Client Costs of \$715	If client should ever move out the house but still in the program (e.g. rehousing period), during which time that agency does not provide rental subsidy, agency should not bill CHF for fix Client Cost of \$715, but Case Management still can be provided and can be billed up to 3 months during a rehousing period	Nothing change for the ACM invoicing	Agency should not bill CHF once client exit the program

Note: ACM can pay the month of fix Client Cost of \$715 during the month that client being housed or exit.

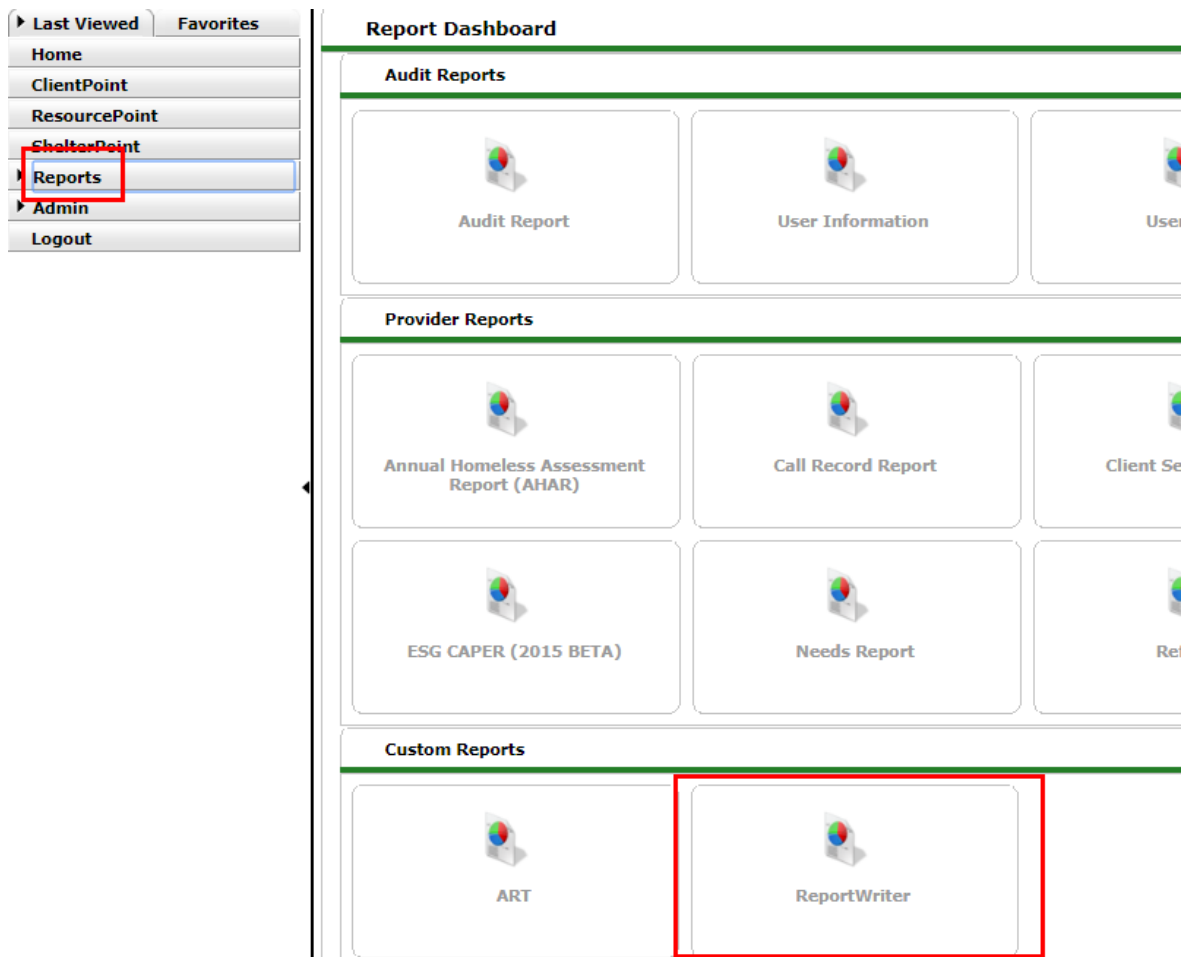
Appendix 7: How to Use the HMIS ACM Program Monthly Report

Purpose


The purpose of this report is to provide ACM reports the ability to retrieve information regarding their ACM Clients prior to the submission of their monthly invoice so that they may cross-reference the information in HMIS with their proposed invoice.

Navigating to the Report

- 1) Login to into ServicePoint and ensure that you are under your agency's ACM program (if you have access to multiple programs, you may need to use "Enter Data As").
- 2) Navigate to ReportWriter:



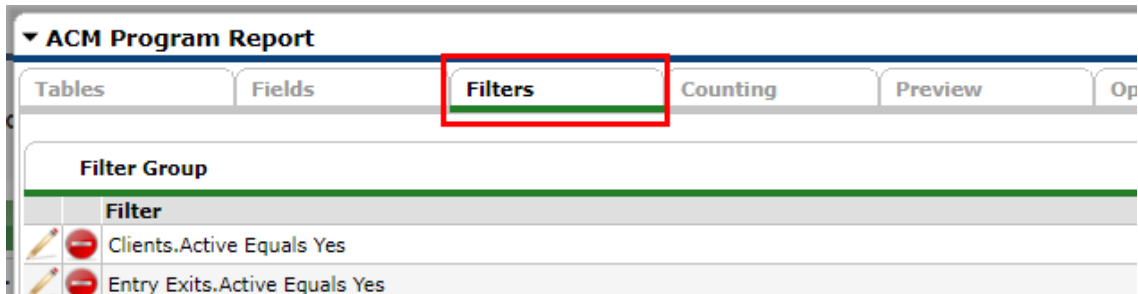
The screenshot shows the ServicePoint interface. On the left is a navigation menu with options: Last Viewed, Favorites, Home, ClientPoint, ResourcePoint, ShelterPoint, Reports (highlighted with a red box), Admin, and Logout. The main area is titled "Report Dashboard" and is divided into three sections: "Audit Reports", "Provider Reports", and "Custom Reports". The "Audit Reports" section contains three tiles: "Audit Report", "User Information", and "User Information". The "Provider Reports" section contains six tiles: "Annual Homeless Assessment Report (AHAR)", "Call Record Report", "Client Se", "ESG CAPER (2015 BETA)", "Needs Report", and "Rel". The "Custom Reports" section contains two tiles: "ART" and "ReportWriter" (highlighted with a red box).

- 3) Open the report "ACM Program Monthly Report" by clicking on the  icon:

		AAF Bowman Batch Upload Test	08/16/2013 09:46:08 AM	Calgary HMIS	
		ACM Program Monthly Report	03/02/2018 08:42:22 AM	Calgary HMIS	Thi acc
		ACM - Referral Report	09/05/2017 09:34:30 AM	Calgary HMIS	Pul AC
		ACM - Referral Report - Updated Sept 2017	09/07/2017 12:06:32 PM	Calgary HMIS	


Pulling the Report

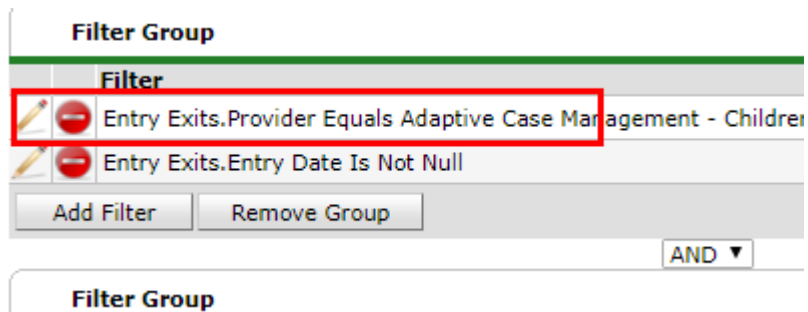
- 1) Click on the "Filters" tab:



The screenshot shows the 'ACM Program Report' interface. At the top, there are tabs for 'Tables', 'Fields', 'Filters', 'Counting', 'Preview', and 'Op'. The 'Filters' tab is highlighted with a red box. Below the tabs, there is a 'Filter Group' section containing a list of filters. The first two filters are 'Clients.Active Equals Yes' and 'Entry Exits.Active Equals Yes', both with edit and delete icons.

- 2) Complete the following steps to edit the required filters:

- a. Click on the  to the left of the "Entry Exits.Provider Equals" filter:



The screenshot shows a close-up of the filter editing interface. It displays a 'Filter Group' with a list of filters. The filter 'Entry Exits.Provider Equals Adaptive Case Management - Children' is highlighted with a red box, and its edit icon (pencil) is also highlighted. Below the list are buttons for 'Add Filter' and 'Remove Group'. At the bottom right, there is a dropdown menu set to 'AND'.

b. Click on "My Provider" to change the program name to your ACM program:


Add new filter

Table/Assessment/Worksheet	Entry Exits	
Field/Question	Provider	
Filter *	Equals	
	Adaptive Case Management - Children's Cottage Society (240)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>





c. Click "Save":

Add new filter

Table/Assessment/Worksheet	Entry Exits	
Field/Question	Provider	
Filter *	Equals	
	Adaptive Case Management - Closer to Home (260)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

d. Click the  icon beside the filter "Entry Exits.Exit Date Is On or After":

Filter Group

	Filter
	 Entry Exits.Exit Date Is Null
	 Entry Exits.Exit Date Is On or After 09/01/2018

AND ▼

- e. Enter the Start Date of the month that you are pulling the report for (**note that that date format is MM/DD/YYYY**) and click save:

Add new filter

Table/Assessment/Worksheet	Entry Exits
Field/Question	Exit Date
Filter *	Is On or After

09 / 01 / 2018

Save Cancel

- 3) Click on the "Preview" tab and download the report into Excel by clicking download:

ACM Program Monthly Report

Tables Fields Filters Counting **Preview** Options

Report Preview

Client ID	Head Of Household	Program	CAA F-SPDAT Total Score	Entry Date	Date of m
62287	Yes	Adaptive Case Management - Closer to Home	63	01/09/2018	
60368	Yes	Adaptive Case Management - Closer to Home	35	01/05/2017	02/03/201
69846	Yes	Adaptive Case Management - Closer to Home	51	11/10/2017	12/01/201
69793	Yes	Adaptive Case Management - Closer to Home	53	09/25/2017	11/01/201
40090	Yes	Adaptive Case Management - Closer to Home	63	09/14/2017	11/01/201
49789	Yes	Adaptive Case Management - Closer to Home	50	08/25/2017	09/20/201
64556	Yes	Adaptive Case Management - Closer to Home	59	06/19/2017	07/19/201
62330	Yes	Adaptive Case Management - Closer to Home	61	07/04/2017	07/04/201
62330	Yes	Adaptive Case Management - Closer to Home	61	07/04/2017	07/04/201
66889	Yes	Adaptive Case Management - Closer to Home	57	07/21/2017	07/31/201
62855	Yes	Adaptive Case Management - Closer to Home	58	07/06/2017	11/15/201
63780	Yes	Adaptive Case Management - Closer to Home	52	07/04/2017	09/07/201
51594	Yes	Adaptive Case Management - Closer to Home	56	06/19/2017	08/01/201
63473	Yes	Adaptive Case Management - Closer to Home	36	06/22/2017	08/04/201
59846	Yes	Adaptive Case Management - Closer to Home	46	01/19/2017	02/02/201

Download Full Report

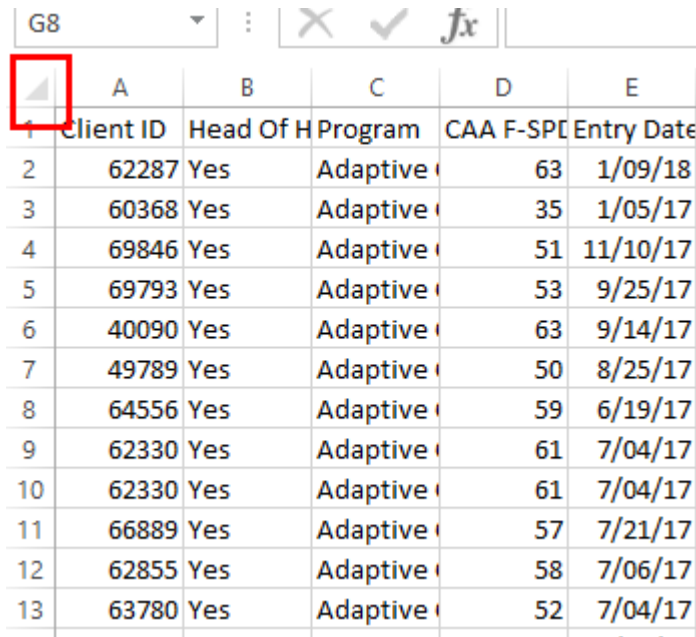
Showing 1-15 of 16

First Previous Next Last

10/20/2015 03:51:03 PM Calgary HMIS

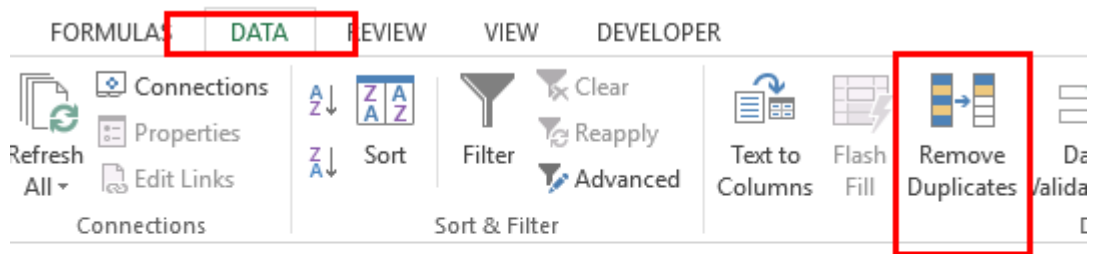
1) Remove any duplicates that may be in the report:

a. Click on the “triangle” in the top left corner of the spreadsheet (this will select the entire worksheet):



	A	B	C	D	E
1	Client ID	Head Of H Program	CAA F-SPE	Entry Date	
2	62287	Yes	Adaptive	63	1/09/18
3	60368	Yes	Adaptive	35	1/05/17
4	69846	Yes	Adaptive	51	11/10/17
5	69793	Yes	Adaptive	53	9/25/17
6	40090	Yes	Adaptive	63	9/14/17
7	49789	Yes	Adaptive	50	8/25/17
8	64556	Yes	Adaptive	59	6/19/17
9	62330	Yes	Adaptive	61	7/04/17
10	62330	Yes	Adaptive	61	7/04/17
11	66889	Yes	Adaptive	57	7/21/17
12	62855	Yes	Adaptive	58	7/06/17
13	63780	Yes	Adaptive	52	7/04/17

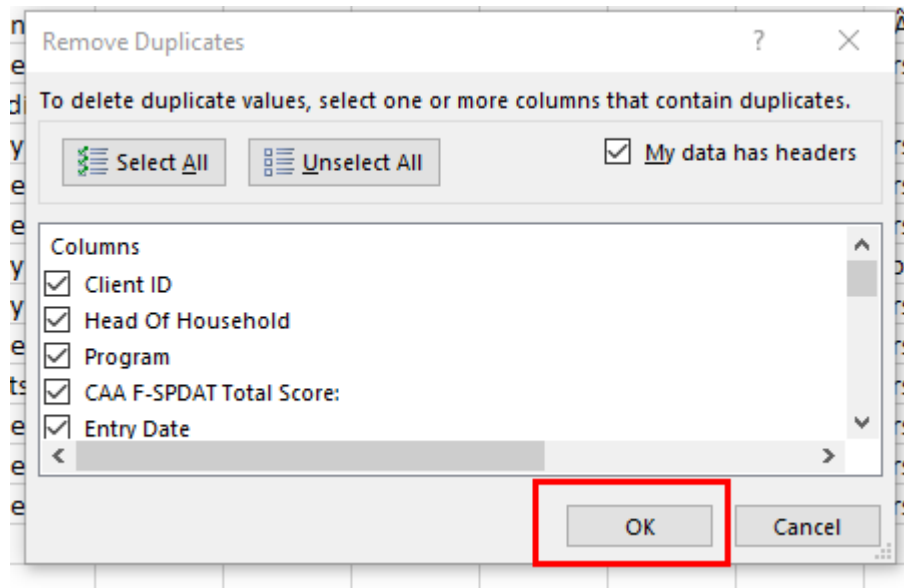
b. Click on the “Data” tab and click “Remove Duplicates”



it ID

E	F	G	H	I	J	K	L	M
Entry Date	Date of m	Exit Date	What was Client refer	Do you be	Do you re	Size of Far	How	
1/09/18			Emergency shelter				3	
1/05/17	2/03/17	1/29/18	Emergency CAA - Fam	Yes	Yes		4	

- c. Click "OK" to remove any duplicates



You will now be left with a list of Clients in your program who are marked as the head of household. You can use this list to compare it against the invoice that you will be submitting to CHF.

Troubleshooting

If you notice a Client that is on your invoice, but is not showing in the list you pulled using the above report, there are a couple of things to check for those missing Clients:

- 1) Ensure that the Client has a program entry into your ACM program:

The above report (and the one pulled by the HMIS Team at CHF) only looks for Clients who have an entry date into your ACM program.

- 2) Ensure that the Client is marked as the **Head of Household (HoH)**:

The report only returns Client who are designated as the **Head of Household (HoH)**. If the Client is **not** marked as the head of household, they **will not** pull into the report (or the report pulled at CHF).

If you are unsure as to why your Client is not pulling into the report, or if you have any questions, please contact HMIS support via email (HMIS@calgaryhomeless.com) or telephone at 403.718.8545.