

OC HMIS Monthly User Meeting Webinar  
**10/25/17**  
**10:00 – 11:00 AM**

HMIS Staff on Today’s Call:

- Erin DeRycke
- Casey Parnis
- Elizabeth Agredano
- Mai Lee
- Adriana McCarty
- Chris Powell

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Version 6 Update – Erin

- Export Schedule page

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- CSV exports are now available in version 6, including the APR, SSVF and RHY repository exports, and the ESG CAPER
- We are working with Adsystemtech to create a role so Agency Administrators have access to run their own exports. Until this is available, users should enter a ticket with the HMIS Helpdesk to request a CSV export, and include their export parameters in the ticket
- Parameters should include: type of export needed (APR, ESG CAPER, SSVF, RHY), date export is needed by, agency name, project name, project type, contract number, start date and end date of export report period
- Reports
  - The following reports are available in version 6:
    - APR summary and details reports
    - ESG CAPER summary and details reports
    - HMIS Data Quality summary and details reports
  - Universal Data Elements, Program Specific Data Elements Entry and Exit, and Bed Utilization reports are all under development with Adsystemtech
  - CFCOC Services Provided summary and details reports are available, but cannot be run because the domain dropdown is incorrect
  - Some ad hocs created in version 5 are now available in version 6 (check your ad hoc inventory page to see what reports are available to you)
  - New ad hocs can be created in version 6
- Required questions for non-federally funded projects
  - Adsystemtech is strictly following the recently released HUD Data Standards, and will only allow Data Standards questions to be answered by those federally funded projects that require the question
  - This means that previous local decisions regarding the Data Standards are no longer in effect
    - Employment questions are no longer required for all projects (only required for RHY and VASH)
    - For veteran clients, date entered military service, branch of the military, and discharge status questions are no longer required (only required for VASH and SSVF)
    - Pregnancy status questions are no longer required for females (only required for RHY)
  - If your project is not federally funded, but would like to answer the disability type questions (physical disability, developmental disability, etc) please enter a ticket with the HMIS Helpdesk, and we can update your project set-up to include these questions
- Reactivating enrollments
  - 211OC now has the ability to reactivate enrollments, but this functionality is not available to the agencies yet
  - Please continue to enter tickets for any necessary reactivations and we can complete those for you
- Permissions for Collaborative projects
  - Agencies participating in collaborative grants are not able to enter new clients or edit existing clients if the agency is not the grantee or “owner” of the grant
  - 211OC is still working with Adsystemtech to resolve this issue
- Missing data
  - At this time, Adsystemtech reports that there are only 121 missing enrollments in HMIS

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- If you continue to find missing data, please enter a ticket with the Helpdesk
- Exit Questions for Federally Funded projects
  - 211OC is still working with Adsystem to make the exit questions for federally funded projects visible
- CoC Entry and Exit Assessments
  - These assessments only include questions that are specific to the CoC
  - 211OC is working with Adsystem to implement rules so these questions are visible to the appropriate agencies

## Data Standards Changes Training – Adriana

- 2017 HUD Data Standards changes were implemented on October 1<sup>st</sup>, 2017
- All users will be required to complete training on <http://training.ochmis.org>
- Training consists of:
  - General 2017 Data Standards training:
    - Should be completed by ALL users in ALL agencies
  - Supplemental trainings on different funding sources:
    - Should be completed only by users whose projects receive a specific funding source
- 211OC will send an email when the trainings are available online, and will include the date the trainings will need to be completed by
- **Training is on hold until HUD Entry/Exit Assessments and changes to Data Standards are correctly implemented in HMIS Version 6**

## Intake and Exit Forms – Adriana

- Intake and Exit Forms have been updated to reflect the 2017 Changes to the Data Standards. They are available on <http://ochmis.org/hmis-v5-forms/>
- The entire Forms are being revamped to match exactly the flow and the terminology of HMIS version 6
- **Intake and Exit Forms will be published once HUD Entry/Exit Assessments and changes to Data Standards are correctly implemented in HMIS Version 6**

## Agency Administrator Training - Mai

- 2-1-1 OC Staff is working on an online training for the Agency Administrator Training
- Coming soon – Date is still TBD

## HIV/AIDS Sensitivity Training – Chris

- Please join us as we host a FREE AIDS Sensitivity Training next Wednesday, November 1<sup>st</sup>
- Representatives from the [AIDS Services Foundation](#) will conduct the training which will consist of a presentation and Q&A session.
- **Where?** CASA Training Room (Upstairs) 1505 E 17th. St Santa Ana, CA  
**When?** Wednesday, 11/01/17, from 2PM to 4PM.

## CFCOC Mini Guide – Elizabeth

- 2-1-1 OC Staff is working on a CFCOC mini guide, which will be available soon

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- The document will serve as a guide on HMIS data entry and reporting required for projects that receive CFCOC funding
- The guide will cover creating and answering CFCOC supplemental questions at entry and exit; scheduling and tracking CFCOC bed nights in the Group Activities Services page, tracking other CFCOC services such as case notes, case management, and developmental screenings; and finally CFCOC reporting. Reports include the General Report that will report on CFCOC-funded deliverables and the ad Hoc reports which will be used to review supplemental CFCOC-required questions answered by your clients
- The guide will be available in PDF format and will be searchable in our Knowledge Base

### Checking Junk Folders – Casey

- Please check your junk folders regularly! You may be missing important updates. If you need assistance with checking your junk folders or marking addresses as “safe” so they will not be sent to junk, please [submit a ticket](#).

### Emailing HMIS Staff Individually – Casey

- Please don't email individual staff!
- When you submit a ticket to the HMIS Help Desk every member of the HMIS Staff can see it.
- If you email an individual staff member they may be out of the office or away from their desk and your question will go unanswered.
- The tickets in the HMIS Help Desk provide training opportunities for newer members of HMIS Staff.
- When in doubt, please [submit a ticket](#).

### HappyFox Ticket Tracking – Casey

- We have heard from users that responses sent by 211OC staff to your tickets do not contain a thread of previous responses and have submitted a ticket to HappyFox asking if we can add this functionality.
- We have created a [Ticket Tracking Template](#) for you to use to track your tickets submitted to the HMIS Help Desk in the meantime.

### HMIS Data Quality Calendar – Casey

- We are working on creating a calendar with monthly Data Quality Reminders that you will be able to subscribe to using Outlook Calendar, Google Calendar, and iCal. If you have suggestions for the types of reminders you would find most useful on this calendar, please [submit a ticket](#).

### Knowledge Base Update – Casey

- We are working to update the existing Knowledge Base articles that contain information for Version 5.
- The Knowledge Base is a great tool to use before submitting a ticket that may solve some problems, before you submit a ticket please type some keywords in the search bar to see if we have an article that can help!
- If you have suggestions for an article you would find useful, please [submit a ticket](#).

## HUD's Guidance on "Other" Response – Casey

- While we cannot remove "Other" as a response option for Prior Living Situation or Destination, we recommend that your agency creates an internal policy of not using "Other" for these questions.
- HUD's response to [our AAQ](#) states "[W]e have zero examples of good uses of "Other" to share. We strongly encourage every user to find a match where possible." Please [submit a ticket](#) if you need help determining a correct answer for Prior Living Situation or Destination.

## AHAR – Casey

- First, HUGE THANK YOU to everyone who has been checking out their correction files. We know the deadline for corrections of Friday, October 24<sup>th</sup>, is very tight and we want to thank everyone who has already made attempts to clean up their data.
- However, we also do not want you to stress over the Friday deadline. We will send out more corrections as issues with the correction export report are fixed by Adsystem that will have a firmer deadline in November. Please save your stress until then 😊

## HMIS Survey – Chris

- So far, we have received wonderful feedback and constructive criticism in our [HMIS User Suggestion Box/survey](#)! We still would like to hear from all of our users before we analyze and implement your feedback to improve the HMIS experience!
- If you haven't already done so, please take 5 minutes to complete [the survey](#) at the end of our webinar, so we can hear your thoughts on our communications and trainings.
- <https://www.surveymonkey.com/r/8Q5FPKY>

## Clarity Update – Erin

- Kick-off meeting was 10/24/17, and included high level planning and deliverables
- A "Go Live" date has not been finalized yet
- Up next: Configuration Planning Call and Migration Planning Call

## Questions and Answers

- **Will you send corrections before the next report cards go up?** Yes

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## Future Meeting Information

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**Next month's meeting date and time:** In person at the CASA Training Room (upstairs at 1505 E. 17<sup>th</sup> St Santa Ana, CA) on Wednesday, November 29<sup>th</sup>, 2017 from 10AM to 11AM. No RSVP or registration is required.

All [User Meeting webinar recordings and meeting minutes](#) are available on our website!

Have an idea for a future agenda item? Submit a ticket via the [HMIS Help Desk](#) using the "HMIS – Users and Trainings" category with your ideas.