OC HMIS Quarterly In Person User Meeting
11/29/17

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Version 6 Update – Erin

- Reports
    - HMIS Data Quality Reports, ESG CAPER, APR, and Ad Hoc reports are working
    - Universal Data Elements, Program Specific Data Elements Entry, and Program Specific Data Elements Exit reports to be released by end of year
- CFCOC
    - CFCOC Services Provided general reports are working, but children are missing from the report
    - CFCOC Services Provided ad hoc is available and should include all services provided under the CFCOC component
    - CFCOC Bed Nights During Reporting Period ad hoc is available and should include all bed nights entered during the reporting period
        - Report will be grouped by contract # once field is available for this ad hoc view
- Data
    - Issues are stemming from change in data structure from version 5 to version 6
    - All missing data from version 5 should now be available in version 6
    - Duplicate enrollments
        - Adsystech ran a script Thanksgiving weekend to merge enrollments under one household; as well as a script last week to resolve outstanding issues

        - If you come across households that are still not merged (meaning there is a separate enrollment for each household member instead of one enrollment for the household) please enter a ticket with the HMIS Helpdesk so we can merge these for you

- Reactivations
    - Agency Administrators now have ability to reactivate enrollments
    - Please check out our Knowledge base article on how to reactivate enrollments
- Permissions to View/Edit Data (including Collaborative projects)
    - Data was originally migrated from v5 at "Organization" level, not group level like we had set-up; this has been fixed
    - 211OC is now going agency by agency to fix group permissions, and we are hoping to have this resolved by 12/8/17
- "Deactivating" Clients
    - This is the new functionality to merge client records in v6
    - Instead of merging, one client record is deactivated, and the enrollment is linked to the remaining active record
    - Users can still update information in an enrollment under a "deactivated client", but no new enrollments can be created under deactivated client
    - Please check out our Knowledge base article on how to deactivate clients
- Report Cards
    - On hold; we will notify users when the UDE, PSDE Entry, and PSDE Exit reports are available, and will provide a due date when corrections should be completed by before starting to run the report cards

Project Performance Reports – Erin

- Project Performance Reports for 7/1/16 – 6/30/17 have been cancelled due to ongoing issues with data in version 6
- We will be restarting the process in January, and will send agencies corrections for 1/1/17 – 12/31/17
- These report cards will be used for NOFA ranking
- At the Data meeting on 12/14, we will how the entries from homelessness measure should be calculated for clients going from one PSH to another and Chronically Homeless clients that are not entering from a homeless situation

Updated English Intake Forms – Adriana

- Intake and Exit Forms have been revamped to match HMIS Version 6's workflow and terminology
- Intake Forms have been published on http://ochmis.org/hmis-v5-forms/
- Exit Forms will be published soon
- Any feedback on the Forms to make data entry process easier is greatly appreciated

Data Standards Changes Training – Adriana

- Most of the issues with the implementation of the changes to Data Standards 2017 in HMIS Version 6 have been resolved

- 2017 HUD Data Standards Training is expected to be released in a couple of weeks
- 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

Agency Administrator Training - Mai

- 2-1-1 OC Staff is working on an online training for the Agency Administrator Training
    - Training will be a lot shorter
    - It will covers Administrator roles & responsibilities, how to reactivate enrollment, deactivate account profile, and how to schedule an export.
    - Status: Final Draft
- Coming soon – Date is still TBD

HIV/AIDS Sensitivity Training – Chris

- 211OC's HMIS team partnered with the AIDS Services Foundation to host an HIV/AIDS Sensitivity training for our HMIS affiliates on November 1st.
- For those who missed the training and would like to learn more about homeless clients with HIV/AIDS, we will post an online training seminar soon.

HMIS Survey – Chris

- We received wonderful and constructive feedback from many of you about how we can improve your HMIS experience.
- Based on your feedback, we are working on improving:
    - Phone communications:
        - We will attempt to decrease the amount of back and forth between 211OC's Staff Members and Agency Administrators.
        - We are still encouraging Agency Administrators to send in tickets as they are they are the most efficient way we can answer your inquiries in a timely matter.
        - Agency Administrators are welcome to call us at any time, but tickets may need to be created in addition to.
    - User Meeting functionality
        - Our goal is to increase attendance, participation in, and the efficiency of our meetings.
            - We are working on increasing the amount meetings.
            - We will host meetings that emphasize updates to HMIS
            - We will ask for attendee feedback on how we can you to participate more
            - Based on feedback, we will attempt to do more demonstrations

        - We may create an online forum for HMIS users
    - Trainings
        - We want to identify and host more trainings that are of interest to Users
            - We will host an online “Collecting Data Quality” training
            - We will host an online “Project Performance Report” training
            - Need to post/host more trainings online
    - The HMIS Calendar
        - We are working on adding more dates, event, and due dates to the calendar
    - Providing more updates on Clarity
        - Whenever possible

CFCOC Mini Guide – Elizabeth

- The CFCOC mini guide will be available as a set of three Knowledge Base articles covering additional HMIS requirements for projects that receive CFCOC Funding: Project Start Guide (covering enrollment and entry assessments), Project Stay guide (covering bed nights, case notes, services, and reporting) and the Project Exit guide (covering exit assessments)
- It should be published by the week of 12/4

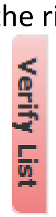
AHAR – Casey

- The final AHAR was submitted on Friday, December 1st!

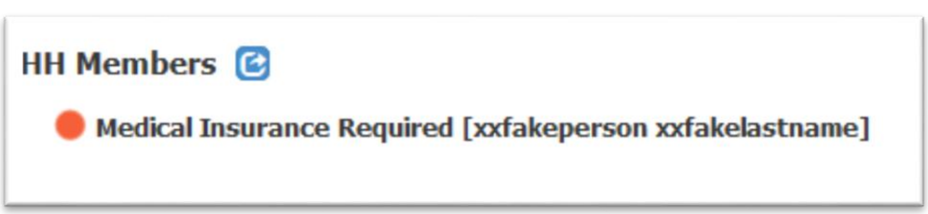
Demos – Elizabeth and Mai

- **Adding Services (Troubleshooting):** If, after creating an application for your client, you go to the Services page and do not see an 

button, it is usually because of one of these three reasons:
    - **Your Client is not verified**: You will know that your client is not verified because the red Verify List quick access window shows on the right-hand side of your screen

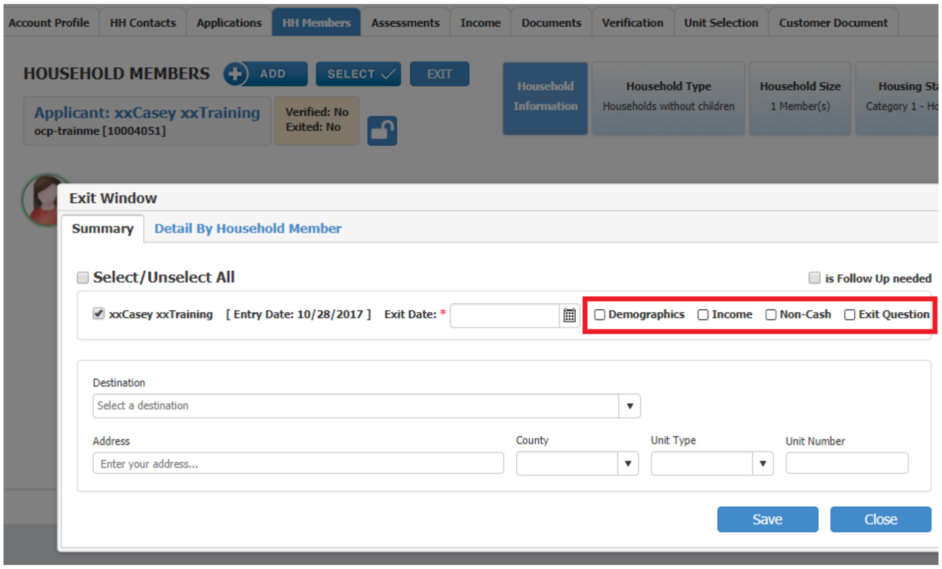


        - To verify your client, click the Verify List quick access window for a list of fields that must be completed in order to verify your client
        - The Verify List quick access window shows three things:



            - The name of the tab/page on which to find the field with missing data (e.g. HH Members)
            - The field that is missing data (e.g. Medical Insurance Required)

            - The name of the person who is missing the data (e.g. xxfakeperson xxfakelastname)
        - Use the go to button ( ) to go to the page on which you need to fill in data required for verification
        - Applications created in Version 5 will often have the Medical Insurance field on the HH Members tab missing, this is because in version 5, this field did not exist
        - Note: fields required for verification are denoted by the icon on the HH Members tab. Income, Non-Cash Benefits, and Medical Insurance questions on the Income tab are also required.
        - To finalize verification, lock your application using the Lock icon on the HH Members, Applications, Assessments, or Income tab (to)
    - **The Application is missing a Location:** If your application is missing a Location, you will be notified of this on the Verification List quick access window.
        - Go to the Applications Tab
        - Click the edit button () next to your application
        - Choose a location from the dropdown
        - Click Save
        - Lock your application
    - **The Application is missing a Domain:** Domains are usually associated with funding sources, and are linked to services. You must assign a Domain to your application in order to make the service list viewable for the application
        - Go to the Applications Tab
        - Click the edit button () next to your application
        - Choose a location from the dropdown
        - Lock your application
- **New Exit Process**
    - As of November 3rd, 2017 – Adsystech has changed the functionality of the Exit popup window.
    - **Steps to complete Project Exit**
        - Go to ‘HH Members’ tab
        - Click on ‘Exit’
        - Simply click on the categories outlined by a red box in the screenshot below. Each item will take you to a pop up where you can edit and save your client’s Exit data. (Each categories is a button – although it may not look like one)



- After you have clicked on each of the categories and completed Exit data entry, you must also check the checkbox next to the category. Enter the client's Exit Date and Destination, and then click save.
- If your program is not federally funded – you will not be required to answer the Exit Question (meaning the Exit Question will not be visible for you during this process)

- **In Version 6** - If you have any clients that disappear from your project, you are still required to answer the Exit Questions. Just select "data not collected" for each question. And then select "No Exit Interview completed" for Destination.
- **There's also a Knowledgebase article on the New Exit Process**: https://211oc.happyfox.com/staff/kb/article/72-completing-exit-data-in-version-6

Clarity Update – Erin

- HMIS implementation scheduled end of March/early April 2018
- Custom data available by early June 2018
- 211OC Recommendations for migration to Clarity (all will be discussed at 12/14 Data meeting)
  - BitFocus should move forward with implementing HMIS first (instead of CES) because if CES is implemented first the release of HMIS will be after April 2018
  - HMIS data migration will include active clients from 10/1/12 forward
  - CES data migration will only include active clients on the Prioritization List
- 211OC will be emailing agencies regarding interest in implementation committee
- 211OC has sent test data to BitFocus so they can start working on the migration process
- Data migration will only include client data, not agency and project set-ups. 211OC and BitFocus will be setting up agencies and projects in Clarity. Sys Admin Training for 211OC will occur within the next month
- 211OC is working on sending BitFocus a list of agencies/projects/funding sources so we can plan who will be completing the set-up for each agency in Clarity

Questions and Answers

- **Can we have login accounts for the HMIS Help Desk?** Yes, please check out instructions for creating HappyFox logins here!

Future Meeting Information

Next month's meeting date and time: Webinar on January 3rd, 2018, from 10-11AM. Click this link to join the meeting. 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.