

OC HMIS Monthly Webinar User Meeting
1/3/18

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Version 6 Update – Erin

- HMIS Data Quality reports
 - Clients must be verified and have a service during the reporting period to be included on the report
 - Reports are excluding some clients who meet this criteria; working with Adsystem to fix
- APR reports
 - Clients must be verified and have a service during the reporting period to be included on the report
- Client Service Aging Report
 - Scheduled to be released early February
- Universal Data Elements and Program Specific Data Elements – Entry and Exit reports
 - No release date yet
- New Data Export page coming soon

CFCOC Update – Erin

- CFCOC Entry and Exit Assessments

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- Additional CFCOC Entry and Exit assessments will need to be completed on the Case Notes page; 211OC will send out more information on this change when it has been finalized
- Some assessments were migrated to version 6 under the incorrect household member. Please enter a ticket to the Helpdesk if you experience this, and we can resolve it for you
- CFCOC Bed Nights
 - Not all bed nights were migrated to version 6; working with Adsystech to fix
 - Scheduling bed nights is not working in version 6; working with Adsystech to fix
 - 211OC has asked Adsystech to make these items high priority, as they have the greatest impact on reporting
- Case Notes page
 - Cannot currently choose activity (weekly case management or developmental/screening assessment); working with Adsystech to fix
- Reports
 - CFCOC Services Provided General report scheduled to be fixed 1/16/18

Clarity Update – Erin

- System Administrator training has been completed for 211OC staff
- Initial project set-up spreadsheets have been completed
 - BitFocus has started project set-ups for 5 agencies
 - 211OC to complete project set-ups for 42 agencies (due March 1st)
- 211OC completing set-up spreadsheet for custom fields in Clarity
 - This includes any custom fields created by the CoC, including the CFCOC Entry and Exit assessments, the city prior to entry question, the referred from CES question, etc
- 211OC is working through data issues found by BitFocus in test export (all issues to be fixed by February 1st)

Project Performance Reports – Casey

- 211OC will pull Project Performance Data from Version 6 later this month for the period of 1/1/17 - 12/31/17.
- A draft of the report will be sent to each Agency Administrator with a timeline for completing corrections before the final report is pulled and aggregated.

AHAR – Casey

- All categories other than ES IND and Summary are useable. ES IND and Summary not useable due to our ES IND bed coverage, which is the percentage of beds participating in HMIS, being below 50%. This is primarily because OC Rescue Mission's projects other than Buena Park, Salvation Army, and the Courtyard are not participating in HMIS.

Data Quality Calendar – Casey

- We are developing a general Data Quality calendar to be posted at ochmis.org with the ability for users to subscribe to the calendar using their preferred calendar app (Outlook, GMail, iCal, etc.)

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- This calendar will only contain monthly data quality monitoring reminders and reminders about published reports such as the Data Quality Report Cards and Project Performance Reports.
- Clarity’s calendar functionality looks very useful and we plan to incorporate APR due dates for each agency in the Clarity calendar, and possibly other reporting deadlines as needed.
- Feedback and suggestions are appreciated! Please submit a ticket to the [HMIS Help Desk](#) if you have any suggestions.

Change Wording of “city prior” Question – Casey

- We have received feedback that the word “residing” in the “What city were you residing in immediately prior to entry into this project?” question can be confusing, since it implies that the client had a “residence” such as a house or apartment prior to project entry.
- We are seeking feedback on possibly changing the wording of this question. During the meeting, the following two suggestions were given:
 - “What city were you in prior to entry into this project?”
- If you would like to give feedback about this possible change, please submit a ticket to the [HMIS Help Desk](#).

HMIS Forms – Mai

- HMIS Exit Forms have been updated to match HMIS Version 6 terminology and workflow.
- There are custom forms for projects that receive PATH, RHY, SSVF, VASH, and CoC/ESG funding, as well as General Form for projects that do not receive federal funding.
- Intake forms have been updated to incorporate the feedback from Users. . Thank you to all the great feedback.
- Both Intake and Exit English forms can be downloaded from the HMIS Forms and Documents page on our website. If there’s any questions – please submit a ticket to the HMIS Help Desk.
- Spanish Intake and Exit forms are up next!

Agency Administrator Training – Mai

- Status Update: Final Draft
- AA Training will be required for all Agency Administrator to take – Administrator who had already taken the training will have to retake since there are new changes/content that will be added to the training.
- New content:
 - Reactivate Enrollments
 - Deactivate Account Profile
 - Export Schedule CSV File
 - Info on Agency Audits
 - Excel Basics
- The new training will be online and it will be a lot shorter. (It will be similar to HMIS Part 1 and 2.)
- We’ll send out an email with more details once the training is ready.

HMIS Part 1 – Mai

- HMIS Part I training is updated – all materials are up to date and align with Version 6.

Annual Assessment Demo – Mai

- This Demo is to demonstrate the creation date of an Annual Assessment.
 1. Ensure the application is verified (locked) first – otherwise the ‘ADD’ button will not be visible.
 2. Go to the Household History page
 3. Click ‘Add’ – enter in creation date: **The Annual Assessment date must be 30 days within the Project Entry’s anniversary date.** If not, it will not be included in the APR report.
 4. Select ‘Annual Assessment’ and then save. (FYI: If you’re just making a regular update, select ‘Update’)
- **If you have any client that has an annual assessment but is NOT within the 30 days of the Project Entry’s anniversary date – you can go and edit the date.**
 1. Select the ‘Annual Assessment’
 2. Go to Detail Page
 3. Click on the ‘Edit’ button next to Demographic
 4. Change the date field and save.

HIC/PIT Update – Elizabeth

- The Housing Inventory Count (HIC) is a count of all beds and units that serve homeless clients and Point-in-Time (PIT) count is a count of sheltered and unsheltered homeless people in a COC.
- As homeless providers, you will provide data for the HIC and PIT count.
- 2-1-1 will provide training and Q&A sessions to aid agencies in reporting data. **Lookout for emails soon with specific times for these trainings and meetings, as well as guidance, and last year’s forms, which will structure this year’s data collection.**
- **This is the schedule of events for this year’s HIC/PIT:**
 - **Training on HIC/PIT Data Collection:** Online webinars held Wednesday, Jan 17th and Thursday, Jan 18th
 - Covers how to fill out the HIC/PIT forms as well as new HIC/PIT Data Collection requirements from HUD.
 - Recommended for all ES, TH, RRH, OPH, and PSH projects
 - This training is what you will use to properly collect data on the night of the HIC/PIT
 - **Night of HIC/PIT Counts:** Friday, Jan 26th
 - Collect data about unit/bed housing inventory and the characteristics of your sheltered clients on this date
 - **Complete Data Entry in HMIS:** Thursday, Feb 1st
 - Have all of your data through Jan 26th entered into HMIS by this date!
 - This is critical as HMIS data must match HIC/PIT forms, and most of the instances of required revisions occur because data on the forms don’t match what is in HMIS.
 - By having all of your entry/exits concerning the period through January 26th completed by February 1st, you can save yourself a lot of time in revisions.

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- **HIC/PIT pre-due date Open Office Sessions:** Held Feb 1st, 2nd, 6th, 7th
 - “Office hours” to assist in completing forms, questions and answer session to help you fill out your forms
 - Arrive with all of data through Jan 26th entered into HMIS
 - Works best with specific questions and first-try already attempted so it is more of a problem-solving session than a walk-through
- **HIC/PIT Forms Due:** EOD Friday, Feb 9th
 - Send to 2-1-1OC Through Helpdesk, select HIC/PIT Category
- **Revision (post-due date) Open Office Sessions:** RSVP by March 2nd for Meetings Week of March 5th
 - “Office hours” to answer questions regarding revisions, assistance finalizing forms

Questions and Answers

- **Are we still on track with the Clarity go live date of 4/1/18?** Yes! It looks like there will be a week or two of transition during which time data will be exported from HMIS and new data during this time will need to be tracked manually via paper forms. This is still tentative, but is something you should prepare for.

Future Meeting Information

Next month’s meeting date and time: In person on Wednesday, February 7th, 2018, from 10-12PM at the CASA training room in the Village (upstairs at 1505 E 17th St. Santa Ana, CA, 92705). 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.