HMIS User Meeting

February 2019
Agenda

- Future Meeting Format - Erin
- Coordinated Entry System Update - Erin
- PSH Performance - Erin
- Clarity Updates - Laila
- Status Due Tab - Laila
- New Knowledge Base Articles - Laila
- New Agency and Program Setup Forms - Casey
- HIC/PIT Update - Elizabeth
- Looker Rename or Delete - Elizabeth
- CoC Board Report Overview - Adriana
- HMIS Training Videos - Mai
- CFCOC Report - Mai
- Q&A
Future Meeting Format

- For the time being, we will continue webinars instead of in person meetings in order to use everyone’s time efficiently

- Feedback? Submit a ticket to the HMIS Help Desk.
Coordinated Entry System Update

- Veteran follow-up questions have been removed from the Profile page for users enrolling clients in the Family Coordinated Entry project.

- Assessment tab has been removed from the client record and is now only available under the client’s enrollment.
  - This prevents a client having a VI-SPDAT completed without the client being enrolled in the Family Coordinated Entry project.

- Pending Changes
  - Assign Navigator
  - Data on felonies
  - Exit screen: Which housing provider or access point exited the household.

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PSH Performance Data

- PSH/OPH Performance data will be reviewed at the February Data and Performance Management meeting
- Agencies received draft data on January 18th and were allowed to make corrections
- New data is now being pulled and will be presented during meeting
- Will compare project’s performance to data shared at September 2018 meeting
Clarity Updates

- Email Notifications for Clarity Inbox Messages
- Canned reports now listed alphabetically
  - Alphabetized in order of code, not title
- “Aged into Adulthood” Notification at Program Exit
  - Notifications to remind them to update a client’s enrollment information when a client turns 18
- Users now prompted to select group members when completing annual/status assessments
  - Users may now select other household members to be included in Annual Assessment/Status update
Users can view all clients under a particular agency who have an Annual Assessment Due.

List of clients who are due for an assessment will appear under Status Due tab.

To view list,
- You have to be under the agency through which the client is enrolled in a project.
- Go to:
  - Caseload Tab
  - Status Due
Data Entry for RHY and HOPWA funded projects
- Entering client information for recipients of RHY and HOPWA funding
  - Creating profiles
  - Enrolling in projects
- Alternative privacy needs for these clients

APR: Chronic Homeless Status for Children
- Questions involving CH status are only asked to heads of household
- Children can inherit their household’s CH status
New Agency and Program Setup Forms

- A new and improved digital form is now available for submitting agency and project setups to the HMIS Help Desk.
- You can find the form in the same location as the old PDF version on the Documents page on ochmis.org.
- Simply complete the form and click Submit to send your setup information to the HMIS Help Desk.
- We will receive a notification that you have completed the form, and we will contact you as soon as setup is completed or if we have any questions for you.
- If you have any questions, please submit a ticket to the HMIS Help Desk.
  - Some users have received an error stating that “Spaces are not allowed” in the Agency Name and Program Name fields after clicking Submit. We have been advised to make sure that browsers are up to date before submitting the form. You can also remove spaces from the Agency and Program Name fields before submitting (“AgencyName” instead of “Agency Name”).
HIC/PIT Update

- Currently in review stage, agency contact should have received feedback on submission
- February deadline to finalize data, we appreciate speedy response to feedback
- Revision Sessions available with the person providing you feedback
  - Opportunity to work one-on-one to finalize forms
  - Held at 2-1-1OC offices
  - Request Revision Session directly or may be suggested to you
  - Will work with you to find convenient time
Looker Rename or Delete

- Agency Administrators can create and save Looks (custom reports) using the Data Analysis tab on the Reports Main Page
- AA’s cannot rename or delete their saved looks
- Has been passed on to the BitFocus Future Enhancement Team, but not guaranteed to be added as a feature
- Contact the Help Desk for us to rename or delete your Looks!
CoC Board Report Overview

- CoC Board Report for the month of January will be presented at the Data Meeting.
- CoC Board reports presented at the previous Data Meetings are available on the Report page of the OC HMIS website:
  - There are individual links to open each monthly report, quarterly report, and trend analysis.
  - The CoC Board Report Narrative include a detailed explanation of each measure, and the way in which each measure is calculated.
HMIS Training Videos

- Check out the OC HMIS YouTube channel!
- Available Training Videos:
  - Logging in for the first time
  - Adding a new client
  - Removing a client from a household
  - Adding services
  - Client notes and public alerts
  - Ochmis.org tour
  - Adding a client to a household
  - Enrolling clients in a project
  - Attendance page
  - Case Notes
  - Annual and Status assessments
  - Exiting clients from a program
CFCOC Report

- **New Location:** Reports will be located in the Data Analysis Page, under ‘Orange County System Reports’
- Reports will show all your agency CFCOC data
- Agency will need to enter in their project name in the filter, if they want to only see a specific project.
- **In Clarity**
Q&A