Future Meeting Format - Erin

- All future user meetings will be held in webinar format
- This allows users who cannot attend the meeting to review the recording at their convenience, and allows users to reference the recording if they have any questions
- The users stated that they also prefer the webinar format

Coordinated Entry System Update – Erin

- 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
The Family Solutions Collaborative would like to add users to the Navigator dropdown on the Referrals page so clients can be assigned to a Navigator; 211OC is waiting on the list of users to be added to the dropdown
  - Data on felonies
    - The Family Solutions Collaborative would like to collect data on felonies during the enrollment process; 211OC is waiting on the questions to be added
  - Exit screen: Which housing provider or access point exited the household
    - The Family Solutions Collaborative would like to add a question to the Exit screen to capture the housing agency or access point that is exiting the household; 211OC is waiting on the list of agencies that should be included in this dropdown

PSH Performance - Erin
- 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
- Agencies can review the PSH/OPH Performance Data Review document sent with their corrections for instructions on reports they can run to confirm the corrections they made were updated in HMIS
- 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
- Canned reports now listed alphabetically
  - Alphabetized in order of code, not title
- “Aged into Adulthood” Notification at Program Exit
  - Clarity sends users notifications to remind them to update a client’s enrollment information when a client turns 18, to meet the HUD requirement
- Email Notifications for Clarity Inbox Messages
  - System sends users notifications for emails that relate to communication between users
- 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

New Knowledge Base Articles - Laila
- Data Entry for RHY and HOPWA funded projects
  - Clients receiving services under RHY and HOPWA funded projects do not allow sensitive information to be shared with the rest of the CoC
  - Article describes how to create a profile and enroll these clients so that sensitive information is only viewable to the agency serving each client
- APR: Chronic Homeless Status for Children
  - For APR purposes, Chronic Homelessness status questions are only asked to heads of household
Children who are not heads of household may inherit their household’s Chronically Homeless status.

**Status Due Tab - Laila**
- Clients who are due for a status update (after a year of enrollment in a project) can show up as due on under a case manager’s Caseload page
- Go to Caseload, then Status Due
- The “Status Due” alert will also show up if you look at a client’s program enrollments

**New Agency and Program Setup Forms - Casey**
- 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 – Elizabeth**
- We are currently reviewing all HIC-PIT submissions
- Your HIC-PIT agency contact should have received feedback from a 2-1-1 staff member on the materials submitted
- The tentative deadline to finalize all HIC-PIT data is end of February, so we appreciate your speedy responses to feedback when you receive it
- For those having trouble finalizing their HIC-PIT submissions, 2-1-1 will offer Revision Sessions
- The Revision Sessions are opportunities to work one-on-one with a 2-1-1 staff member to finalize your forms
- They will be held in a meeting room in the 2-1-1 OC offices
- To attend a Revision Session, simply request one from the person who has been providing you feedback on your HIC-PIT submission, or the staff member may suggest it for you
- We will work together to find a convenient time to schedule the Revision Session, with the goal of finalizing all forms by the end of February

**Looker Rename or Delete - Elizabeth**
- Agency Administrators can create and save Looks (custom reports) using the Data Analysis tab on the
Reports Main Page

● However, AA’s cannot rename or delete their saved looks because this is not currently a feature available in Clarity
● We have submitted a ticket to BitFocus regarding this issue, and it has been passed on to the BitFocus Future Enhancement Team, but is not guaranteed to be added as a feature
● In the meantime, please contact the Help Desk if you wish to rename or delete your Looks!
● Let us know which Looks you want to delete, and if you want to rename a Look, make note of the new name

CoC Board Report Overview - Adriana

● The 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, quarterly reports 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 - Mai

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

CFCOC Report - Mai

● 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

Holidays
● The HMIS Help Desk will not be available on Monday, February 18th, 2019, for the President’s Day holiday. HMIS Staff will respond to tickets and voicemails on Tuesday, February 19th.

Future Meeting Information

Next month’s meeting date and time: Webinar on **Wednesday March 6th, 2018, from 10-11AM**. No RSVP or registration is required. [Click this link](#) to join the meeting on March 6th.

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.