OC HMIS Monthly User Meeting Minutes

OC HMIS User Meeting Webinar Minutes
9/4/19

Contents
Data Meeting Agenda 1
New Field for CFCOC 2
New Forms 2
Data Standards Training 3
Agency Audits 3
Q&A 3

Data Meeting Agenda

● We will be discussing the month’s Data and Performance Management Committee Meeting agenda at each HMIS User meeting from now on.
● The Data and Performance Management Committee Meeting is held on the second Thursday of the month from 1:30 to 3 PM in the CASA Training Room (upstairs at 1505 E 17th St Santa Ana 92705).
● Meeting dates and times may change, please subscribe to the OC Community Resources list to receive potential changes to meeting times.
● September Data and Performance Management Committee Meeting information:
  ○ Thursday, September 12th from 1:30 - 3 PM upstairs at 1505 E 17th St Santa Ana 92705.
  ○ Agenda:
    ■ Project Performance Data Review: PSH/OPH
      ● Reporting period: 8/1/2018 - 7/31/2019
      ● Measures:
        ○ Average Length of Homelessness
        ○ Increased Income for Adult Stayers and Leavers
        ○ Entries from Homelessness***
        ○ Number of Days to Housing Placement
        ○ Returns to Homelessness
      ● Unit Utilization
      ● Maintained PSH/OPH or Exited to PH
      ● Cost Per Successful Outcome (CoC Funded only)**
    ■ Data Quality Plan
      ● The County of Orange and 211OC have been participating in a Community of Practice webinar series with HUD TA providers to discuss data quality best practices and possibilities for improvement.
We will be discussing an updated data quality plan for our CoC. You can read our current data quality plan on pages 16 - 18 of the OC HMIS Policies and Procedures.

Case Notes Sharing
- If time permits, we will discuss the possibility of sharing case notes within our HMIS. This would mean that HMIS Users would be able to see case notes entered by agencies other than their own. There would still be an option to mark case notes private (viewable only to HMIS Users at the agency of the user who entered it) but the goal is for HMIS Users to be able to get a fuller picture of clients’ experience with homelessness and what they have received from previous agencies. Only case notes entered after we decide to share case notes, if we do decide to share, will be shared. Case notes will not be retroactively shared.
- We will also discuss the possible implementation of a standard case note template that outlines what kind of information belongs in case notes. If your agency uses a template for case notes and you are willing to share your template with the group, please submit a ticket to the HMIS Help Desk with your template attached. The purpose of developing a template is to make sure that clients receive standardized case management and that case notes cannot be a source of discrimination against clients. For example, using only factual descriptions of clients’ experiences and actions and not case managers’ interpretation of clients’ experiences and actions (“Client applied for five jobs but has not heard back, we reviewed resume/interview skills and developed a plan for more applications” vs “Client still has not found a job, they are not ready for housing.”)

New Field for CFCOC
- The Children and Families Commission (CFCOC) has requested that all projects that receive funding from their agency collect data on primary language in HMIS
- This field has already been added to the Enrollment screen for CFCOC funded projects
- This data must be collected in HMIS for all clients active as of 7/1/19
- For assistance running a report to determine the clients that this data needs to be collected for, enter a ticket with the HMIS Help Desk

New Forms
- Always visit the OC HMIS Documents page for the latest version of HMIS forms and documents
- The following forms are now digital submissions:
  - New Agency/Project Set Up
  - Custom Field Setup
  - Agency/Project Deactivation
  - User Revocation of Access
  - Data Request
When you submit a form, a ticket is automatically created in the HMIS Help Desk which alerts 211OC of your form submission. You do not need to enter a ticket letting us know that you have submitted a form but if you would like to provide us with more information about your submission or enter a ticket to create a record for yourself please feel free to do so!

Data Standards Training

- 2020 HMIS Data Standard Trainings will be available on September 17th, 2019 on the HMIS Training Site
- Users will need to complete General 2020 HMIS Trainings plus supplemental trainings that pertain to your agency by September 30th
- Updates will be live on Clarity October 1, 2019
- New users will take the updated HMIS Part 1 & 2 along with any additional supplemental training their agency has (PATH, RHY, etc.)
  - New Users = users that have not taken any HMIS training prior to September 17th, 2019
- Most updates are minor
  - Data elements 4.06 Developmental Disability and 4.08 HIV/AIDS follow up question, when client identifies as having one or another, “Expected to substantially impair ability to live independently” has been removed
  - New response options and elimination of other options for other data elements

Agency Audits

- The annual HMIs Agency Audits will begin soon
- Agency audits are meetings between a 2-1-1 HMIS staff member and an agency administrator, in which we ensure your agency’s compliance with the HMIS Policies and Procedures and go over any HMIS question you may have
- We’ve made changes to the agency audit section of the Policies and Procedures that states the audit check-list be sent one-month prior to the meeting. This will expedite the agency audit scheduling process.
- After the P&P is approved, audits will be scheduled
- Anticipated start date is late September/ early October

Q&A

- **Will agencies that currently do not use the case notes function in HMIS be required to do so in the future?** The purpose of sharing case notes and developing a case notes template is to standardize case notes that are already being entered into HMIS. While agencies will not necessarily be required to enter case notes, we encourage all agencies to make use of this function as it provides a valuable record of clients’ experience with our homelessness services Continuum of Care and insight into what helps clients attain and retain permanent housing.
- **When will the sharing of case notes be implemented?** We do not have a timeline yet as we are still in the early discussion stages, but plenty of warning will be given if we do decide to share case notes as a community via email notifications and announcements at the HMIS User Meeting and Data and
Performance Management Committee Meeting.

- **Will we be expected to use the standard case note template or can we use our own?** The standard case note template will be developed with community input and will likely not be enforced as a strict requirement of using the case notes feature, but we will strongly recommend that all agencies align their case notes policies with the spirit of the standardized template which is factual information devoid of judgement of the client that could negatively impact their ability to be housed.

- **Does Clarity have the functionality to automatically enter a case note template on the case notes page?** Unfortunately there is no way to automatically insert a case notes template into the case notes page.

### Next month’s meeting date and time

Webinar on **Wednesday October 2nd, 2019, from 10-11AM**. No RSVP or registration is required. [Click this link](#) to join the meeting at that time.

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.