OC HMIS User Meeting Webinar Minutes  
07/01/20

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August 2020 HMIS User Meeting Webinar

Agenda Items

Bed Reservation Update

● The new Emergency Shelter Bed Reservation process is beginning today (7/1/20). Emergency Shelters interested in participating in the new process should submit a ticket to the HMIS Help Desk.

● 211OC led a demo of the new Bed Reservation process during the meeting.

● Below are items that will need to be completed by agencies currently participating in the HMIS Bed Reservation process.
  ○ Access Points: Complete Bed Reservation Assessments for households currently waiting to be matched to Emergency Shelter.
  ○ Emergency Shelters: Enter any units available for a match starting 7/1/20.
  ○ Any HMIS users that will be participating in any part of the Bed Reservation process in HMIS will need to complete the HMIS Coordinated Entry training if they have not already done so.
● Please refer to the time stamps provided on the July 2020 User Meeting Webinar for the following Bed Reservation topics:
  ○ Role of Access Point - 2:05
  ○ Role of Matchmaker - 6:40
  ○ Emergency Shelter Providers - 8:48
    ■ Denying a Referral - 9:30
    ■ Accepting a Referral - 9:30
  ○ Adding Housing Opportunity - 12:45

2020 HIC/Sheltered PIT Highlights

● The final 2020 HIC and Sheltered PIT data has been submitted to HUD!
● Thank you to all the agencies that participated in the process.
● Visit the links below to see an overview of the submitted data:
  ○ 2020 Housing Inventory Count (HIC) Overview
  ○ 2020 Sheltered Point in Time (PIT) Overview

Client Document Update

As part of a larger project to standardize 211OC’s HMIS materials, the Client Privacy documents have been updated to match formatting. No content has changed on any of the forms and your agency will not be “dinged” for using the previous version of any form as long as the Last Revision date in the corner of each document is the latest date. See below for the correct document dates:

● Consent to Share Protected Personal Information: 07/2018
● Note Regarding the Collection of Personal Information: 08/2018
● Privacy Notice: 09/2018
● HMIS Grievance Form: 09/2018
● Client Revocation of Consent Form: 09/2018

Agency Audit Focus Group

Due to the ongoing COVID19 crisis, the HMIS Agency Audit process will change for 2020 to a virtual format. The 2020 HMIS Agency Audit will be different from audits we’ve conducted in the past, and we are asking any interested Agency Administrators to participate in an upcoming focus group to discuss the new process. We want to incorporate your feedback into the new HMIS Agency Audit process so that the audits are as helpful as possible for you. If you are interested in participating, please respond to the Doodle poll to determine a time that works for as many people as possible. The Doodle poll will close on Wednesday, July 8th, so make sure to vote as soon as possible!
Project Performance Report Check-In
We polled today’s HMIS User meeting attendees on whether or not they feel their agency is ready to resume the data correction process for Project Performance Reports and the majority of respondents indicated that they were still unable to work on Project Performance data corrections due to still working from home and not being able to access client files. We will check in again at the August 2020 HMIS User Meeting.

Performance & Data Quality Review Poll
Based on the HMIS User Survey that we sent out last month, a majority of users responded that they would like to incorporate the review of the project performance and data quality results. This is a process that we would like to start implementing and at today’s meeting we conducted a short poll in order to have an idea of how the community would like to proceed with the process.

- How would you like to review your agency’s data quality and project performance report results?
  - During the annual HMIS Agency Audit
  - Separate occasion from the HMIS Agency Audit
- When would you like to review your agency’s data quality and project performance report results?
  - ASAP as virtual meeting
  - Wait until safety guidelines are in place to meet in person
  - Other, please explain

It seems like a majority of users would like it to be a separate occasion from the audit as a virtual meeting option. We are still in the planning process and nothing is nailed down for sure yet but we want to be respectful of your time and be helpful to you in improving your data quality!

Thank you for participating!

HMIS User Survey Feedback
We wanted to highlight some of the results that stood out to us based on the responses to the HMIS User Survey that we sent out last month to give you an idea of the accessibility and usage rates of the different functionalities that are available with HMIS.

- We asked users “How often do you use these features in HMIS?”
  - We got a lot of mixed responses for this one but a majority of users are using HMIS to Record Services, Review Client History, and also Tracking Enrollments/Exits. A good number of users also said that they “Never”, “Rarely” or only “Sometimes” use the Attendance page, Record case notes, Record assessments or Run reports.
- We asked users “How easy is it to use these features in HMIS?”
  - For the most part, we got a lot of “Neutrals” and “Easy” for a majority of these features with a couple of responses being “Difficult” on features such as assessing the Attendance Page, Recording Assessments, Reviewing Client History, Running Reports and Tracking Enrollments/Exits.
● We asked users “How often do you use these features in HMIS?”
  ○ We are glad to see that a lot of people are using HMIS and also accessing our website. But it does not seem like a lot of people are using the Youtube Training Videos as a reference. Another one would be the Help Desk Ticket System but that can be explained because that feature is being used by Agency Administrators only.

● We asked users “How easy is it to use these features in HMIS?”
  ○ Users responded that either it was “Neutral” or fairly “Easy” to use.

● Last but not least, we asked users to “Please rate the quality of support you have received from the HMIS team in the past.”
  ○ A majority of users responded that our support has been “Excellent” or “Good” with a few exceptions of the Help Desk Tickets and Phone Calls being “Fair”.

Based on these results, please feel free to express any comments or concerns by submitting a ticket to the Help Desk. If you feel like you want to be more proficient with a feature that you are struggling with OR want to learn more about a feature that you have not really used before, please submit a ticket to the Help Desk so that these features can be more of value to you and your agency!

Please let us know if there is anything we can do to better assist you!

**HMIS User Survey Comment Followup**

We received the following comments on the HMIS User Survey in response to a question asking about what HMIS Users want to track in HMIS but aren’t sure how to do:

● **Budgeting, Obtained Employment, and Stabilization of Mental Health** - If this was your comment, please get in touch with the HMIS Help Desk by submitting a ticket. We have some ideas on how to track this information in HMIS but need more details from you about exactly what you want to see!

● **Increased Income** - You can check out the “Goal 6 (Stayer Increased Income) & 7 (Leaver Increased Income)” report on the Data Analysis tab of your Reports page to see if this report meets your needs for tracking increases in income. If not, please get in touch with the HMIS Help Desk by submitting a ticket.

● **Client Locations Prior to Entry** - You can check out the “Goal 1 (Entries from Homelessness)” report on the Data Analysis tab of your Reports page to see if this report meets your needs for looking at clients’ locations prior to project entry. If not, please get in touch with the HMIS Help Desk by submitting a ticket.

● **Exits to Permanent Housing** - The [GNRL-220] Program Details Report [2019] report on the Report Library tab of your Reports page includes clients’ Destinations and can be filtered in Excel to show the count of clients exiting to permanent housing destinations. The HMIS team is also updating the dashboard HMIS Users see upon logging in to HMIS to include a graph that shows the count of client exits to Permanent, Temporary, and Other destinations in a reporting period. This dashboard will be able to be edited to a custom selection of projects, project types, and reporting periods. If you need something like this now, please get in touch with the HMIS Help Desk by submitting a ticket and we can
set something up for you, or register for our Looker Training Webinar on Thursday, July 30th, at 10AM to create your own!

We also received a comment from an HMIS User asking if there is a way to see a Head of Household’s Housing Move-In Date applied to all members of the household as displayed in the [GNRL-106] Program Roster report. Luckily, this can be done using Looker/the Data Analysis tab! Using the HMIS Performance model, in the Enrollments section of the field pane is a field called “Household Move-In Date.” This screenshot shows the field’s placement within the Enrollments section. This field will apply the Head of Household’s Housing Move-In Date to all members of the household. If you would like assistance setting up a report using this field, please get in touch with the HMIS Help Desk by submitting a ticket, or register for our Looker Training Webinar on Thursday, July 30th, at 10AM to create your own!

**HMIS Training Video Roadmap**

- We received a lot of feedback asking for more specialized training and we are working on providing additional training resources!
- Here are some currently available resources that we have recently released:
  - HMIS Cheat Sheets
    - HMIS Data Element & Reporting Guide: This document aims to show users how each data element listed feeds into system-wide reports. Additionally it also lists how these data elements could possibly yield data issues.
    - HMIS Data Element Cheat Sheet: Profile Creation and Enrollment: This part of the cheat sheets tries to help users form questions that will help get the required data elements form their clients. Additionally it helps to clarify how these data elements should be recorded in HMIS.
    - HMIS Data Element Cheat Sheet: Exiting, Annual and Status Assessment: This guide also helps to clarify how and when certain data elements should be recorded in HMIS as well. Specifically project exit date, determining destinations and when to complete assessments.
    - HMIS Coordinated Entry Cheat Sheet: This guide discusses how data elements affect clients that are in CES and their access to housing opportunities. It also aims to clarify when data elements should be recorded as well. It details data elements for access points, all CES users and housing agencies.
    - Disabling condition flowchart: In HMIS the way we track disabling condition involves not only stating that they have a disabling condition but identifying which condition that is. This chart helps guide users in determining if the disability the client is reporting is one that needs to be recorded and identified.
    - Prior Living Situation Flowchart: This flowchart helps users understand the elements captured in the Prior Living Situation Data Element. This is not a new data element, but just a reformatted flowchart that is already listed in the 2020 HMIS Data Standards.
  - HMIS Glossary
  - HMIS Monthly Training Webinars

- Upcoming Quarterly Training Schedule:
  - July 2020: Looker Training (Register here!)
OC HMIS Monthly User Meeting Minutes

- August 2020: CES Training
- September 2020: Agency Admin/ Data Quality
- October 2020: HMIS Part 2

● Revamped Video Flowcharts:
  ○ CES Training Videos Road Map
  ○ HMIS Workflow Road Map
  ○ Household Management Road Map

● These videos will be in addition to funding specific training as well as reporting training we currently have. The goal will be to revamp all currently standing videos with updated information, style and format.

Q&A

● When was the poll sent for the time slots for audit? The link was sent in the chat earlier but it will also be included in our meeting materials, here’s the link! This is for a focus group to discuss the new audit process, it won’t schedule your agency’s 2020 audit.

● Do you know when NOFA is going to drop? Unfortunately, we have not heard anything about the CoC Process.

● I have questions regarding the Annual Assessment Report from Looker that was just emailed out - do I run a ticket or how do I set up a discussion? Since this is specific to your agency, please enter a ticket.

Helpful Materials

- Running a Saved Look
- Filtering in Excel
- Housing Move-In Date

Future Meeting Information

August 2020 HMIS User Meeting Webinar

- Date: Wednesday, August 5th, 2020
- Time: 10:00 - 11:00 AM
- Click here to join the meeting! No registration or RSVP 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.