

OC HMIS User Meeting Webinar Minutes 2/2/22

Contents

Agenda Items	1
2022 HIC and Sheltered PIT	1
HMIS Policies and Procedures - New/Updated Policies	2
CoC Dashboards	3
HMIS Part 2 Recertification	3
C1 Well-being Data Element Training Resource	3
New Clarity Updates	4
Data & Performance Management Committee Meeting Agenda	4
President’s Day Holiday	4
Q&A	4
Future Meeting Information	5
March 2022 HMIS User Meeting Webinar	5

Agenda Items

2022 HIC and Sheltered PIT

- The HIC and Sheltered PIT have been postponed until February due to the ongoing COVID-19 surge related to the Omicron variant. The updated due dates are below. Please review the [2022 HIC and Sheltered PIT knowledge base article](#) for more details on the process, and plan to attend the HIC and Sheltered PIT Training.
- Important Dates:
 - February 15th 2:00 - 3:00: HIC/Sheltered PIT Training
 - Meeting link:
<https://us02web.zoom.us/j/89978942773?pwd=MjhPaDhjWWVOSkRZVXdsRTMvZU5Xdz09>
 - Meeting ID: 899 7894 2773
 - Passcode: 640547
 - February 21st: Night of the Count
 - February 24th: Agencies complete data entry in HMIS or comparable database

OC HMIS Monthly User Meeting Minutes

- February 25th: 211OC sends all agencies HIC Answer Form, and sends HMIS participating agencies PIT data
- March 4th: Agencies submit final HIC Answer Form and PIT data to 211OC

HMIS Policies and Procedures - New/Updated Policies

- The [HMIS Policies and Procedures](#) has been approved by the CoC Board. To review all proposed changes, please review the [Proposed Changes - HMIS Policies and Procedures slides](#).
- HMIS User Fee Policy
 - Agencies required to participate in HMIS will be charged for the following active users at the end of the previous calendar year.
 - 1 – 5 users: \$750 annually
 - 6 – 24 users: \$2,750 annually
 - 25 or more users: \$3,500 annually
 - CES Access Points will be charged \$200
 - Agencies are allowed up to two active Agency Administrators at a time. Agencies will be allowed an additional Agency Administrator for every 700 active enrollments at the end of the calendar year. Agencies that require additional Agency Administrators must pay the set-up and ongoing user fees for those accounts.
- Minimum Participation Requirements
 - 211OC will conduct a quarterly review to ensure all agencies are meeting the minimum participation requirements outlined below. Reviews will begin in April.
 - At least one active user
 - At least one active enrollment
 - HMIS data entry in the past 30 days
 - Submit the HIC and/or PIT for appropriate project types
 - At least one active Agency Administrator
 - Staff representation for at least one User Meeting during the previous quarter
- Projects set-up in HMIS set-up as combined Homelessness Prevention/Rapid Re-Housing projects must be set-up as two separate projects in HMIS. 211OC will be reaching out to the agencies with these projects to assist with project set-up and moving enrollments.
- HMIS user accounts will be locked after 60 days of inactivity. Users whose accounts are locked due to inactivity will need to complete the HMIS Part 1 and Part 2 trainings to regain access.
- All new clients that consent to share their data in HMIS are required to have a copy of their Client Consent Form on file in HMIS. Users can either have their clients complete an Electronic Signature on the Consent Form, or upload a PDF copy of the Consent Form.
- Client Record Requests
 - Clients can go to any HMIS participating agency to request their record.
 - The Agency Administrator submits the request to HMIS Help Desk within 5 business days, and is responsible for working with the client to determine how they will receive their Client Record

OC HMIS Monthly User Meeting Minutes

Request Dashboard.

- 211OC will send the Client Record Request Dashboard to the agency, which includes the client’s Profile information, Release of Information, Program Enrollment History, and Client Documentation.
- The Agency Administrator is required to review the dashboard with the client upon request.
- The [Grievance Form](#) has been updated to include a section for case manager or advocate contact information. Also, clients can now call the HMIS Help Desk to submit a HMIS related grievance.
- The [Project Performance Overview](#) document has been published, and includes the schedule of Project Performance Reports, a description of each measure, the universe of clients included on the measure and how the measure is calculated, and the thresholds for each project type included in the measure.

CoC Dashboards

- The CoC Dashboard for Q4 is currently available on the OC HMIS website, [Quarter 4 2021 \(10/1/21 – 12/31/21\)](#)
- The dashboard contains information on the clients who were active in any project type in HMIS or contacted 211OC for information and referral during the reporting period.
- We have added a filter in the report for Transitional Aged Youth Households. You can select Yes or No which will change the displayed report.

HMIS Part 2 Recertification

- Users that did not complete the recertification by January 31st, their accounts are locked until the Recertification is completed. These users must complete the [HMIS Part 2 Recertification](#) in order for their accounts to be unlocked.
 - Users with Read Only accounts or accounts created on or after June 1st are excluded from this requirement.
- Agency Admins can check their agency’s DropBox for a list of users whose accounts have been locked.
- Agency Administrators must submit the [2021 HMIS Part 2 Recertification Form](#) for their users.

C1 Well-being Data Element Training Resource

- HUD has released a Training Resource for the C1 Well-being Data Element.
- It includes data element rationale, suggested language to use when collecting this information from clients, and other considerations.
- Use this resource if any staff conducts the intake assessment for clients being enrolled into PSH projects.
- This resource may be found by clicking on the link provided here: [HMIS C1 Well Being-Data Element Training Resource](#).

OC HMIS Monthly User Meeting Minutes

New Clarity Updates

We wanted to share some Clarity updates that Bitfocus recently released that we think will be helpful to you!

- Different Colors for Different Site Types
 - To assist users in visually distinguishing between Clarity Human Service site types, we have implemented color schemes for each instance type. Production sites will keep their current color, but the header and login side panel will now be blue for training sites.
- New “Reopen” Program Button
 - This update introduces a Reopen Client Program button on the client Program Exit screen that allows you to reopen a Program enrollment for a client.
 - Please refer to the Knowledge Base article “Reopen Enrollment Button” for more information on this feature!

Data & Performance Management Committee Meeting Agenda

The February 2022 Data and Performance Management Committee Meeting’s agenda is as follows:

- New PH Project Performance Goals
- Street Outreach Project Performance Reports

It will be taking place on Thursday February 10th, 1:30 - 3:00.

- Click [here](#) to Join!
- Meeting ID: 864 5764 1876
- Passcode: 914075

President’s Day Holiday

The HMIS Help Desk will be closed on Monday, February 21st in observance of President’s Day. We will be back in the office to assist you Tuesday, February 22nd.

Q&A

Client Record Requests

- If a client refuses to release their information within HMIS and they received services from several different agencies, do they need to go to each individual agency to review their information?
 - With the HMIS Record Request, the client will receive data entered into HMIS by all agencies the client was served by so they will not need to request this from each agency. Contact the Helpdesk on behalf of your client to request this report.
- Follow up question: Who would they work with if they wanted to review it? 211 OC?
 - The client will work with the agency with whom they file the HMIS Record Request. Client records should be reviewed with a staff member who is familiar with HMIS data to address any concern the client may have.
- For clarification, would the Agency Admin for the agency need to call the Help Desk if clients may have a private record? Or for grievances can any HMIS User call the Help Desk?

OC HMIS Monthly User Meeting Minutes

- Yes, if the client's record is private you will need to ask the HMIS Help Desk to assist in locating the client's record.

Regarding grievances, the client may not feel comfortable submitting the HMIS grievance with your agency/staff so the client may call the HMIS Help Desk to file a grievance related to HMIS.

Clarity Updates - Reopen Client Program

Please review the OC HMIS Knowledge Base article for additional information: [Reopen Program Enrollment](#)

- So the "Reopen" feature will allow us to do this if we need to add services or anything like that once a client has already been exited, and then we can just reprocess the exit once we're done, correct?
 - If you're looking to edit or add services, you can remove the exit date and make the appropriate corrections. Once completed, you can add the exit date and save.
 - The "Reopen Client Program" is meant for when a client was accidentally exited and you need to clear the whole exit screen.
- So you will have to re-enter the exit data?
 - Yes, if you click "Reopen Client Program" it will clear out all the data from the Exit screen.

Future Meeting Information

March 2022 HMIS User Meeting Webinar

- Date: Wednesday, March 2nd, 2022
- Time: 10:00AM - 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.