OC HMIS User Meeting Webinar Minutes
4/6/22

Contents

Agenda Items

HMIS Minimum Participation Requirements

- Starting in April the HMIS team will be conducting quarterly reviews to ensure agencies are meeting the Minimum Participation Requirements outlined in the HMIS Policies and Procedures.
- Each agency will be reviewed to ensure the following items are true.
  - At least one active user in HMIS
  - At least one active enrollment in HMIS
  - HMIS activity in the past 30 days
  - At least one Agency Administrator that is an active HMIS user
  - Submit the HIC and/or PIT for appropriate project types
  - Staff representation for at least one User Meeting during the previous quarter
  - Pass the HMIS annual audit
- Agencies may run the Minimum Participation Requirements Dashboard in HMIS to review the first four items listed above. Agencies serving as Access Points for the Coordinated Entry System may also run

the CES Minimum Participation Requirements Dashboards. CES Dashboards can only be run while the user is accessing the Family Solutions Collaborative agency for Family CES and the County of Orange agency for Individual CES. Review the Running a Saved Look knowledge base article for instructions on how to pull these reports.

- Agencies will be notified of the results of their review. Agencies that do not meet the Minimum Participation Requirements may be reviewed by the Agency Access Working Group to determine the appropriateness of the agency's continued access to HMIS.

Coordinated Entry Assessment Changes

- The Individual and Family VI-SPDATs have been replaced in HMIS with the Individual and Family CES Assessments. These assessments are available on the Assessments tab under the Coordinated Entry enrollment. The assessments are much shorter than the VI-SPDATs, and only include information on the Assessment Date, Location, Type, Level, and the housing opportunities the household is interested in.
- This change does not impact clients already on the CES Community Queue; the new assessments only apply to clients that will complete a CES assessment in the future.
- Paper forms have also been published for these assessments.

Agency Access Appeals Policy

The HMIS Policies and Procedures has been updated to include the appeals process for agencies that are denied access to HMIS by the Agency Access Working Group.

- Agencies that are denied access to HMIS by the Agency Access Working Group may request an appeal. The purpose of the appeal is to ensure the integrity of the review process for the agency's application.
- Appeals must be submitted to the HMIS Help Desk.
- The HMIS Lead will complete the Agency Access Process Review, and determine whether the review process was followed appropriately.
- If all steps of the review process were followed, the decision by the Agency Access Working Group stands. If all steps in the review process were not followed, a sub-set of the Policies, Procedures, and Standards Committee will provide a secondary review and make a final determination regarding the agency's application.
- This decision cannot be appealed, but agencies denied access to HMIS may re-apply in the future if they can effectively address the reasons their initial application was denied.

CoC Dashboard

- The CoC Dashboard for Q1 will be available next week on the OC HMIS website. The reporting period will be between 01-01-2022 to 03-31-2022
- 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.

Client Record Requests

Clients have the right to request and review their data in HMIS. The following process has been put in place to provide this information:

- The Client will contact an agency participating in OC HMIS from whom they have previously been served.
- The Agency Administrator will submit a ticket to the HMIS Help Desk to request the Client Record Request Dashboard for the client within five (5) business days of the request.
  - In the ticket, state that a client is requesting their Client Record Request Dashboard, and include the client's HMIS ID only (no names or other identifying data).
  - Decide with the client when and how they will receive the Dashboard keeping in mind that it may include sensitive client information such as name, SSN and their current. Please review the article on Protecting Client Data for additional information about protecting client privacy.
- The HMIS Helpdesk will receive the request and send the Dashboard to your agency's Dropbox.
- The Agency Administrator will then deliver the Dashboard in the method decided upon with the client, and review it with them.

Additionally, you may direct the client to the HMIS Client Record Requests page which contains information and instruction oriented specifically towards clients.

Further details on the policy and this process are provided in the Client Record Requests knowledge base article.

RHY PSDE Dashboards

Program Specific Data Elements (PSDE) Data Completeness Dashboards and Details Reports are now available for the specific federal funding sources RHY.

- These Dashboards and Details reports follow the same format as the existing Universal Data Elements (UDE) and PSDE Dashboards and Details reports, including both Entry and Exit data.
  - Each Dashboard contains charts which each represent a Data Element, broken down by project.
  - Color coding provides visual cues to easily identify data quality errors.
  - The Details Reports display additional granularity to the client level to identify client errors.

- Review these reports on a monthly basis to ensure data completeness for these elements. They may be found by clicking on the Launchpad, then navigating to Reports>Data Analysis>Orange County Clarity System Reports. Scroll down to the "Data Quality" section to view both the Dashboards and Details Reports.

Housing Notes
- Housing Notes should be used for information related to housing the client under the Provide Services tab
- These notes will be shared with the CoC in order to streamline the housing process for the client and to coordinate care among multiple agencies
- Housing Notes should follow the PIRP format: Purpose, Intervention, Response, Plan KB: Recording Case Notes and Housing Notes in HMIS

System Performance Measures Report
The System Performance Measures (SPM) allows CoCs to regularly measure their progress in meeting the needs of people experiencing homelessness in their community and to report this progress to HUD
- To review the report in greater details, please visit the OC HMIS website, HUD System Performance Reports

EHV Resources
This guide is a helpful resource for Public Housing Authorities (PHAs), Continuum of Care (CoCs), and Victim Services Providers (VSPs) to understand key components of the EHV program including:
- Provide an overview of Emergency Housing Vouchers (EHV) operating requirements
- Highlight best practices in program implementation
- Partnerships and referral processes, use of service fees, housing search requirements, application of EHV waivers and alternative requirements

Emergency Housing Vouchers: A How-To Guide for Public Housing Agencies

Data & Performance Management Committee Meeting Agenda
The agenda for this month's meeting is as follows:
- Agency Set-Up Review
- PSH/OPH PPR
- The meeting will take place on Thursday April 14th, 1:30 - 3:00.
  - Click here to Join!
  - Meeting ID: 815 9146 3305
  - Passcode: 171207

Q&A - N/A
HMIS Minimum Participation Requirements

- Is participation in CES a requirement or that if the agency does have access to CES, then they need to meet those requirements?

- No, participation in CES is not a requirement but there are some agencies that are only participating in CES and should have enrollments on the CES Dashboard.
- When you mean active user, do you mean the user needs to have a caseload or do they just have to be doing data entry?
  - For active users, we mean users with an active HMIS account that can log into Clarity. They don't necessarily have to have a caseload. Users need to log into their account every 60 days in order for the account to remain active.

Coordinated Entry Assessment Changes

- Does that mean there are several fields to include both assessments in the report?
  - It depends on the report. If the report includes specific fields, then it will be on the report. Many of them do not but the Coordinated Entry reports have filters that include specific assessments and those filters have been updated to include the new Individual and Family CES assessments.

Client Record Requests

- For Family households, is the Head of Household able to request the Client Record for their minor children? How would this work?
  - Adults are able to request Client Records for their children that they have guardianship over and should be contacting the agency that they are being served by so that the agency can verify the client's identity and the parental role of the adult requesting the record.
- Can we receive the client level details of the HIC report as pulled by OC211?
  - Yes, you have access to that now. It is under the HIC PIT section of the Data Analysis tab in HMIS. The report is called 2022 HIC: Active Clients (RRH, PSH, OPH).
- Will this presentation be sent out to all agencies?
  - Yes, All User Meeting webinar recordings and meeting minutes are available on our website.

Future Meeting Information

May 2022 HMIS User Meeting Webinar

- Date: Wednesday, May 12th, 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.