

Welcome!

July 2022
OC HMIS User Meeting

**Please enter your agency
name in the chat box**

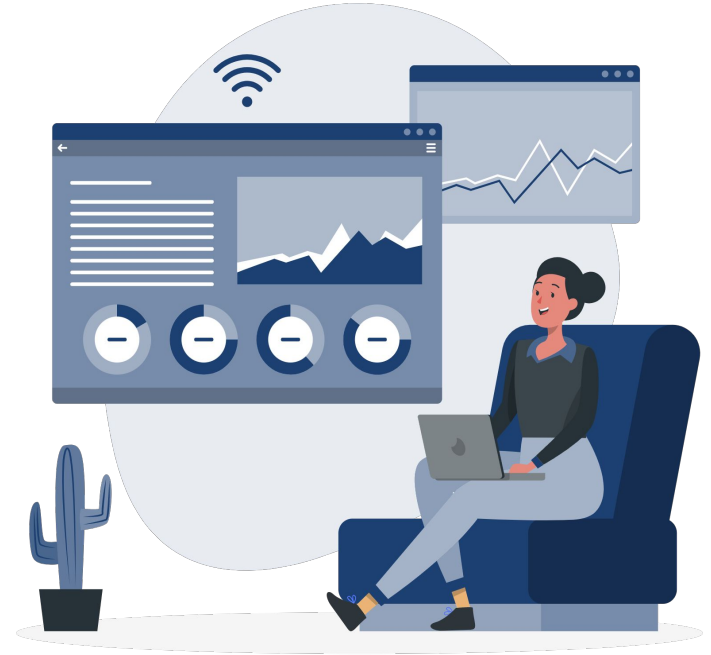


Agenda

1. Data Completeness by User Dashboards
2. Staff Update
3. 2022 Agency Audit
4. Clarity Update - Release of Information
5. Clarity Update - City Prior and Assessment Location Fields
6. DropBox Clean Up
7. SSVF PSDE Dashboard
8. Data & Performance Management Meeting Agenda
9. Q&A

Data Completeness by User Dashboards

- The following dashboards have been created to review data completeness by user:
 - UDE Data Completeness by User
 - PSDE Entry Data Completeness by User
 - PSDE Exit Data Completeness by User
- Dashboards are available under the User Management section of the Data Analysis tab.



Data Completeness by User Dashboards

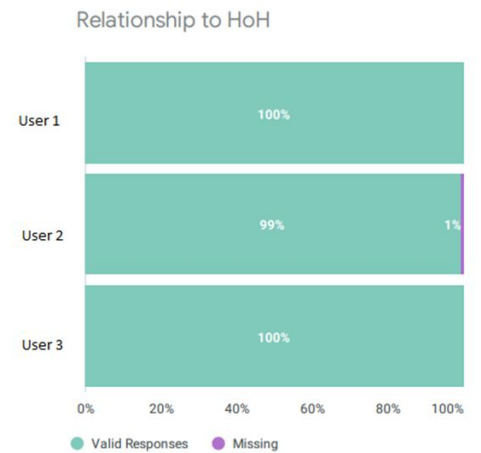
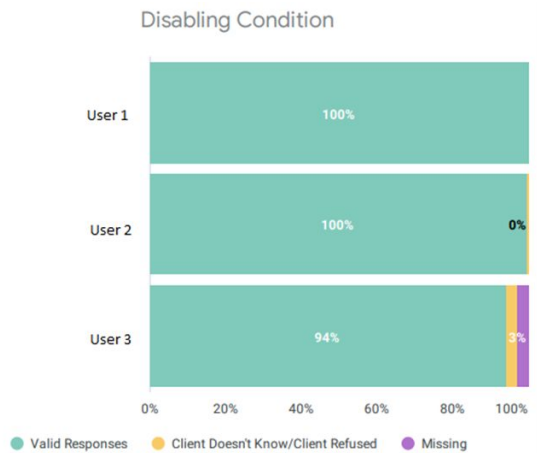
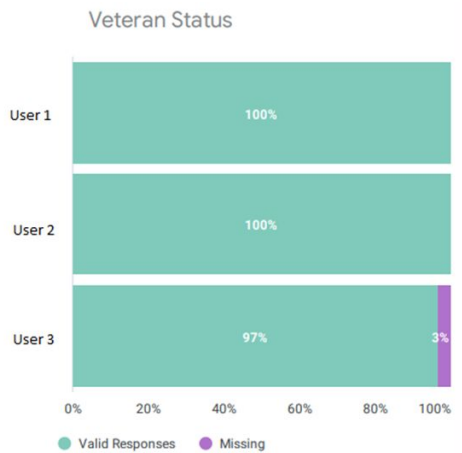
UDE Data Elements

- Demographic information (Name, DOB, SSN, Gender, etc.)
- Relationship to HoH
- Disabling Condition
- Residence Prior to Entry Questions
- Destination

PSDE Data Elements

- Income
- Non-Cash Benefits
- Health Insurance
- Disability Types
- DV Questions

Data Completeness by User Dashboards



Staff Update

- Please welcome Andrew Estaris as our newest Data Analyst!



2022 HMIS Agency Audits

- This month we will begin conducting agency audits for 2022.
- We will reach out to your agency 2 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.
- Please be on the lookout for our email to schedule your Agency Audit. We will be attaching the audit form for your agency but it is available for you to review on this link, [2022 Agency Audit Form](#)



2022 HMIS Agency Audits

- You will need to review the attached files on the audit form. These reports contain information such as active users for your agency, active projects, current bed inventory, and users in your agency that are receiving correspondence from 211 OC.
- Please review the reports and complete the audit form questionnaire 2 business days before your scheduled audit meeting.

All agencies must submit signed copies of the HMIS Participating Agreement and Inter-Agency Data Sharing Agreement. Current versions of both forms are available [on our website](#). Forms must be dated in 2022 and signed (wet signature) by leadership at the agency.

HMIS Participating Agency Agreement

or drag files here.

Inter-Agency Data Sharing Agreement

or drag files here.

Completed by 211OC

Test Agency's Active Users in HMIS



[Test Agency Active Users.csv](#)
277 bytes



Test Agency's Additional Agency Access in HMIS:



[Test Agency Additional Agency Access.xlsx](#)
15.5 KB



Test Agency's Program Descriptor Data for active projects in HMIS:



[Test Agency Program Descriptor Data.csv](#)
1.1 KB



Test Agency's Funding Source Data for active projects in HMIS:



[Test Agency Funding Sources.csv](#)
886 bytes



Test Agency's Bed Inventory Data for active projects in HMIS:



[Test Agency Bed Inventory.csv](#)
1.4 KB



Email addresses at Test Agency receiving emails from 211OC



[Test Agency MailChimp Emails.xlsx](#)
8.9 KB



2022 HMIS Agency Audits

- The following forms must be dated in 2022 and signed (wet signature) by leadership at the agency.

[Participating Agency Agreement](#)

[Inter-Agency Data Sharing Agreement](#)

All agencies must submit signed copies of the HMIS Participating Agreement and Inter-Agency Data Sharing Agreement. Current versions of both forms are available [on our website](#). Forms must be dated in 2022 and signed (wet signature) by leadership at the agency.

HMIS Participating Agency Agreement

or drag files here.

Inter-Agency Data Sharing Agreement

or drag files here.

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Test Agency's Active Users in HMIS



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Test Agency's Additional Agency Access in HMIS:



[Test Agency Additional Agency Access.xlsx](#)
15.5 KB



Test Agency's Program Descriptor Data for active projects in HMIS:



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1.1 KB



Test Agency's Funding Source Data for active projects in HMIS:



[Test Agency Funding Sources.csv](#)
886 bytes



Test Agency's Bed Inventory Data for active projects in HMIS:



[Test Agency Bed Inventory.csv](#)
1.4 KB



Email addresses at Test Agency receiving emails from 211OC



[Test Agency MailChimp Emails.xlsx](#)
8.9 KB



Clarity Update - Release of Information

- A Clarity update to the Release of Information (ROI) procedure in HMIS has been implemented as a result of the revised 2022 HMIS Policies and Procedures.
- HMIS now requires an agency to upload a signed *Client Consent to Share Protected Personal Information* hard copy form or provide a client's electronic signature during the first in-person meeting.
- Further information on the new policy may be found in the [Orange County HMIS Policies and Procedures](#) document on our OCHMIS website.



Graphic by <https://storyset.com/online>

Clarity Update - Release of Information

New Client

OC Training Agency Heather Goodie, System Admin HG

SEARCH CASELOAD

CREATE A NEW CLIENT

Social Security Number 333 - 45 - 0000

Quality of SSN Approximate or partial SSN reported

Last Name Boone

First Name Daniel

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 03/05/1926 Adult Age: 96

Middle Name None

Gender Male

Race White

Ethnicity Non-Hispanic/Non-Latin(a)(o)(x)

Veteran Status No

Please fill in Release of Information form **CANCEL**

RELEASE OF INFORMATION

Permission Yes

Start Date 06/30/2022

End Date 06/30/2029

Documentation Select

- Select
- Electronic Signature
- Attached PDF
- Verbal Consent
- Household

CONSENT REFUSED

Consent Refused

Documentation Attached PDF

File **Select File**

Documentation Electronic Signature

E-SIGN DOCUMENT

Existing Client

1 Louie Dane

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

Release of Information is Missing or Permission Not Provided. Please review to ensure compliance. **MANAGE**

CLIENT PROFILE

Social Security Number XXX - XX - XXXX

Quality of SSN Client doesn't know

Last Name Dane

Household Members **MANAGE**

Pete Dane Uncle

Charlie Dane Nephew

2

3 Louie Dane

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

RELEASE OF INFORMATION

Permission Yes

Start Date 06/30/2022

End Date 06/30/2029

Documentation Select

SAVE CHANGES **CANCEL**

Documentation Select

- Select
- Electronic Signature
- Attached PDF
- Verbal Consent
- Household

Updated Responses for City Prior to Entry & Assessment Location

Response Options

The 'unincorporated Orange County' option has been removed and replaced with:

1. Unincorporated Orange County – Central SPA
2. Unincorporated Orange County – North SPA
3. Unincorporated Orange County – South SPA

Where This Field Exists

- Enrollment Screen
- ICES Assessment
- FCES Assessment
- Veteran Assessment

Updated Responses for Enrollment Screen: City Prior to Entry

These updates will be seen in HMIS in the following locations:

1. Enrollment Screen

2. Assessment Location Field

OC CUSTOM QUESTIONS

What city were you in immediately prior to entry into this project?

Is this client receiving services funded by the Children and Families Commission Orange County?

Which access point is serving this household?

Which SPA is this household being served in?

Have you or someone in your family ever been legally evicted?

Primary Language

Is anyone in the household currently pregnant?

Are you in the process of reunifying with any minor children?

Anaheim

Orange

Placentia

Rancho Santa Margarita

San Clemente

San Juan Capistrano

Santa Ana

Seal Beach

Stanton

Tustin

Villa Park

Westminster

Yorba Linda

Unincorporated Orange County – Central SPA

Unincorporated Orange County – North SPA

Unincorporated Orange County – South SPA

Outside Orange County, but in California

Outside of California

Client doesn't know

Client refused

Data not collected

SAVE & CLOSE

CANCEL

Updated Responses for Assessment Location

These updates will be seen in HMIS in the following locations:

1. Enrollment Screen

2. Assessment Location Field

The screenshot shows a web application interface for the 'PROGRAM: FAMILY COORDINATED ENTRY SYSTEM'. The 'Assessments' tab is active. The 'FAMILY CES ASSESSMENT' form is displayed with the following fields and values:

- Assessment Date: 07/05/2022
- Assessment Location: Select (dropdown menu open)
- Assessment Type: [Empty]
- Assessment Level: [Empty]
- OF THE HOUSING OPPORTUNITIES THE HOUSEHOLD IS CURRENTLY INTERESTED IN? [Empty]
- Rapid Re-Housing: [Empty]
- Housing Choice Voucher: [Empty]
- Permanent Supportive Housing: [Empty]
- SELECTING THE PRIVATE CHECKBOX MEANS ONLY PRIVATE HOUSING: [Empty]
- Private: [Empty]

The dropdown menu for 'Assessment Location' is open, showing a list of locations. The selected option is 'Unincorporated Orange County – Central SPA'. Other options include Laguna Woods, Lake Forest, Los Alamitos, Mission Viejo, Newport Beach, Orange, Placentia, Rancho Santa Margarita, San Clemente, San Juan Capistrano, Santa Ana, Seal Beach, Stanton, Tustin, Villa Park, Westminster, and Yorba Linda. At the bottom of the form are 'SAVE' and 'CANCEL' buttons.

DropBox Clean Up

- Bi-Annual DropBox Clean Up Schedule
 - January
 - July
- Please go through your Agency's DropBox folder and download any files you will need for your records
- We will be going through DropBox on Monday, July 25th to remove all files
- Thank you for your cooperation!



SSVF PSDE Dashboard & Details Report

- A Program Specific Data Elements Data Completeness Dashboard and Details report are now available for the SSVF specific federal funding source.
- Separate dashboards and details reports are included for both Entry and Exit data.
- Review reports to ensure data completeness for these elements.
- Reports > Data Analysis > Orange County System Reports > Data Quality



PSDE Entry SSVF Data Completeness Dashboard

Connection to SOAR
Required for HoHs and Adults



Last Grade Completed
Required for HoHs and Adults



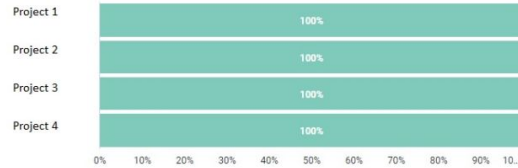
Employment Status
Required for HoHs and Adults



Reason Not Employed
Only required if Employment Status is 'No'



Type of Employment
Only required if Employment Status is 'Yes'



Year Entered Military Service
Required for Veterans



Year Separated from Military Service
Required for Veterans



Theatre of Operations: World War II
Required for Veterans



Theatre of Operations: Korean War
Required for Veterans



PSDE Entry SSVF Data Completeness Detail Report



Agencies Agency Name	Programs Full Name	Programs Project Type Code	Clients Unique Identifier	Enrollments Enrollment ID	Enrollments Household ID	Entry Screen Head of Household (Yes / No)	Entry Screen Age at Project Start	Adult/HoH	Clients Client Full Name	Enrollments Project Start Date	Enrollments Project Exit Date	Entry Screen SOAR Connected	Entry Screen Last Grade Completed	Entry Screen Employment Status	Entry Screen Employed: Why not	Entry Screen Employment Type	Clients Year Entered Military Service	Clients Year Separated from Military Service
1	Project 1	PH - Rapid Re-Housing	AF64C8A5D	192722	165327	Yes	65	Yes	Donald Duck	2022-06-30	0	No	Some college	No	Looking for work	0	2017	2021
2	Project 1	PH - Rapid Re-Housing	C6D845D6A	192699	165314	No	40	Yes	Mickey Mouse	2022-06-30	0	No	Grade 12	No	Looking for work	0	0	0
3	Project 1	PH - Rapid Re-Housing	F40E23F92	192700	165314	No	9	No	Strawberry Shortcake	2022-06-30	0	0	0	0	0	0	0	0

Data & Performance Management Committee Meeting

Agenda:

1. Racial Inequity Dashboard
2. Emergency Shelter PPR

Thursday July 14th, 1:30 - 3:00

Click [here](#) to Join!

Meeting ID: **810 9405 7685**

Passcode: **625080**

Q&A

Thank you
Have a great day!

Next User Meeting: Aug 3rd