

## OC HMIS User Meeting Webinar Minutes 8/3/22

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### Agenda Items

#### ***Agency Racial Inequity Dashboard***

- The Agency Racial Inequity Dashboard has been published and is available in HMIS for all agencies. The Agency Racial Inequity Dashboard Details is also available, which is a client-level dashboard of the same information.
- The dashboards are meant to inform agencies about how their active clients compare to the OC population as a whole, how different racial and ethnic groups are represented in sub-populations, and how effectively different racial and ethnic groups are being served.

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- The Active Clients section of the dashboard compares the active clients at the agency to the OC Census. Races or ethnicities below the OC Census line are under-represented at the agency, and races or ethnicities above the OC Census line are over-represented.
- The Sub-Populations section compares the races and ethnicities of clients that are in the sub-population to the clients that are not. A description of each sub-population is below.
  - Chronically Homeless: The client met the definition for chronically homeless as of project start.
  - Households with Children: At project entry, the household included at least one adult (18+) and one child (under 18).
  - Households without Children: At project entry, all household members were age 18 or older.
  - Households with only Children: At project entry, all household members were under the age of 18.
  - Youth: All household members are under the age of 25 at Project Start.
  - Seniors: The age of the client at Project Start is 62 years old or older.
  - Veterans: The client identified as a veteran.
- The Performance Measures section of the dashboard compares how effectively racial and ethnic groups are being served by the agency. The measures included in the dashboard are all from the [Project Performance Reports](#).
- Review the [Running a Saved Look](#) article for instructions on how to run the dashboards. They are available under the Racial Inequity section of Orange County Clarity System Reports.

### **Removing Looker Save Access**

- Users with access to save looks in Clarity can edit any reports created by 211 OC and those changes will be applied to all agencies.
- The ability to save looks in Clarity is being removed to prevent any errors with report functionality.
- CES Agency Admin Matchmakers will still have the Looker save access.

### **Reactivation of HMIS User Accounts**

- Per the [OC HMIS Policies and Procedures](#), any account that has been inactive in HMIS for over 60 days will be automatically set to inactive. Clarity will notify you via email 2 calendar days before the 60th day to log in to keep your account active.
- If any user allows their account to lapse, they will need to retake the HMIS Part 1, Part 2 training course and the HMIS Skill Test.
- You will need to submit a Help Desk ticket so we can reset the training courses which will allow the user to take the courses again.
- For any account, it is a good practice to ask the user for the certification that they completed the training courses necessary for an account activation.

### **CoC Dashboard**

- The CoC Dashboard is now available on the OC HMIS website. The reporting period is [Quarter 2 2022 \(04/1/22 – 06/30/22\)](#)

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- 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.

### ***Q2 Data Quality Report Cards***

- We are in the process of publishing the Q2 DQ Report Cards. It will be published in the next coming weeks.
- Thank you for taking the time to make corrections to your Agency's Data!
- We will send out an email announcement once the Report Cards have been published.
- In the meantime, agencies can review previous Data Quality Report Cards from different quarters on our [website](#) or monitor your agency's Data Quality anytime by running the [HUDX-225] HMIS Data Quality Report in Clarity! You can find this report listed under Report Library under the HUD Reports section.

### ***Housing Move In Date Banner Update***

- Before this update, the system displayed a warning banner when any household member's Housing Move-In Date was not on or between the Project Start Date and Project Exit Date
- To better align with HUD logic, the system will now only display the banner when the Head of Household's Housing Move-In Date is not on or between the Project Start Date and Project Exit Date
- The banner will be displayed for all household members in the enrollment (not just the Head of Household) when the HoH's Housing Move Date is before Program Start Date or after Program Exit Date

### ***Private Client Files***

- In order for CES Leads to review client documentation and verify eligibility, homelessness verification and disability verification documentation must be set to public
- The access point currently working with the client needs to receive verbal or written consent to have those forms re-upload as public. The client may decline consent and provide a new verification of disabling conditions if they prefer.
- Once the access point receives consent from the client, they should upload the consent and send a ticket to the Help Desk so that we can assist with reuploading the file with the correct privacy settings

### ***Funding Source Linked to Services***

- HMIS has recently made changes to the available funding source options for service items with funding enabled.
- The only options available for the funding source pick list for service items will be funding sources actively assigned to the project
- Should not affect most service items, but if yours is affected please submit a ticket so that we can configure the funding source to be actively assigned to the requested project

### ***Data Element 4.02 Income and Sources***

This Data Element is collected to determine whether households are accessing all income sources for which they are eligible and to allow for analyzing any changes to income between project start and exit.

- **Project Type Applicability:** All Programs - All Components
- **Data Collected About:** Heads of households and Adults
- **Collection Point:** Project Start, project exit and anytime income or sources change (e.g. if a minor child enters or leaves a household).
- **Screens in HMIS:** Enrollment Screen, Annual Assessment Screen, Exit Screen

The four most common errors associated with this data element are

- Confusion between SSI, SSDI and Retirement Income from Social Security
- General Assistance listed as Other income
- No income entered as Other income \$0
- Noncash SNAP not entered for people receiving public assistance

For clarification and guidance on these errors, plus video instruction on how to add Income and Sources, please see the [Income and Sources](#) KB Article available [on our website](#).

### ***2022 Agency Audit***

- The HMIS Help Desk will reach out to Agency Administrators at least two weeks before with available meeting dates and times providing a few options to schedule the audit so as to ensure ample time to prepare. Please be on the lookout for our email to schedule your Agency Audit. We will be attaching the Audit Form for your agency.
- 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.
- The following forms must be dated in 2022 and signed (wet signature) by leadership at the agency: Participating Agency Agreement & the Inter-Agency Data Sharing Agreement

### ***Agency Admin Training***

- 211 OC updated the Agency Admin Training materials, please review the updated video and PowerPoint under [HMIS Recorded Training](#)

### ***Data & Performance Management Meeting Agenda***

- Data & Performance Management Meeting is canceled for this month.
- The Street Outreach PPR will be published next week.

### ***Labor Day Holiday***

- The HMIS Help Desk will be closed on Monday, Sept 5th in observance of Labor Day.

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### Q&A

- Q: Agency Racial Inequity Dashboard - What age range is considered as a "youth" and is this counting youth in family households?
  - A: Households with all members are under the age of 25 years old.
  
- Q: Data Element 4.02 Income and Sources. Please elaborate on the bullet point Noncash SNAP not entered for people receiving public assistance, does this mean non-cash benefits are not being entered?
  - A: Yes, this is a common error where users are not recording non-cash benefits for some clients. The [Income and Source knowledge base article](#) will provide additional details and guidance.
  
- Q: Reactivation of HMIS User Accounts - Will the inactive for 60 days process start this month? Activity can be simply logging in, correct?
  - A: The [OC HMIS Policies and Procedures](#) states that if a user is inactive for 60 days their account will be set to inactive. To regain access, the user will need to retake the HMIS Online Courses and Skill Test.  
Yes, logging into Clarity would reset the user's "inactivity clock".
  
- Q: Removing Looker Save Access - Does this mean if an Agency is in need of setting up a look, we would need to reach out to the HMIS Team?
  - A: Yes, if your agency may need to create a look please submit a ticket to the HMIS Helpdesk. The HMIS Helpdesk will support with creating and editing looks. Agencies will still have access to looks they've created in Clarity.

### **Future Meeting Information**

#### **September 2022 HMIS User Meeting Webinar**

- Date: Wednesday, September 7th, 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.