

# Welcome!

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August 2022  
OC HMIS User Meeting

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



# Agenda

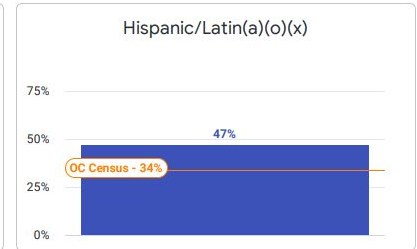
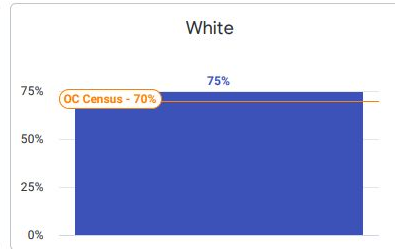
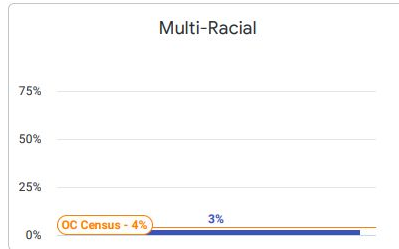
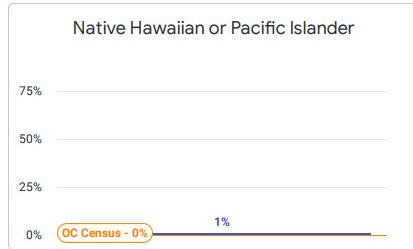
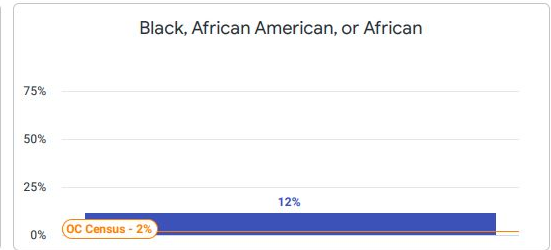
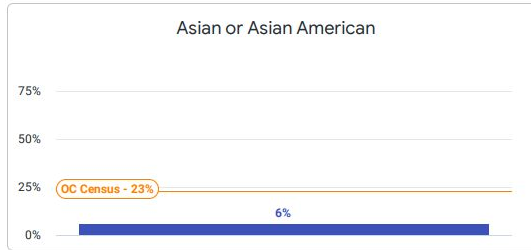
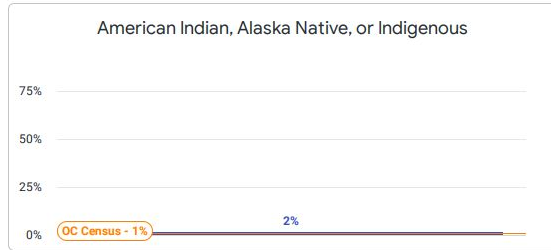
1. Agency Racial Inequity Dashboard
2. Removing Looker Save Access
3. Reactivation of HMIS User Accounts
4. CoC Dashboard
5. Q2 Data Quality Report Cards
6. Housing Move In Date Warning Banner
7. Private Client Files
8. Updated Funding Source Linked to Services
9. Data Element 4.02 Income and Sources
10. 2022 Agency Audit
11. Agency Admin Training Video
12. Data & Performance Management Meeting Agenda
13. Holiday
14. Q&A

# Agency Racial Inequity Dashboard

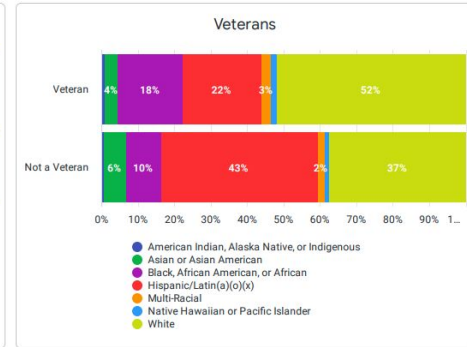
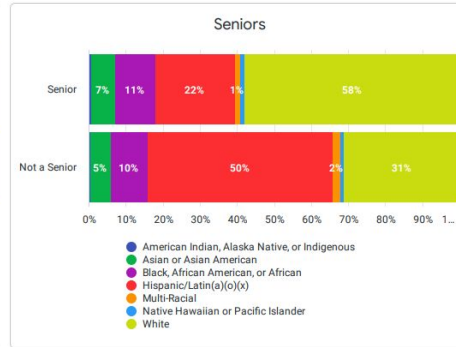
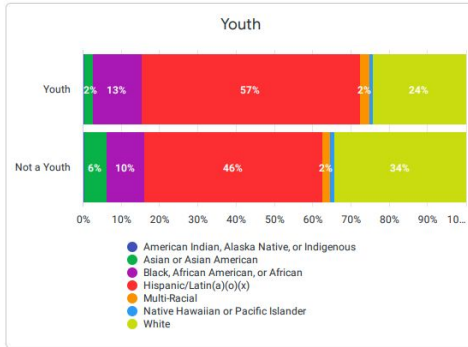
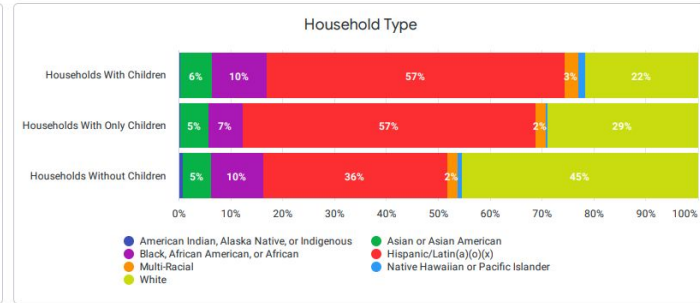
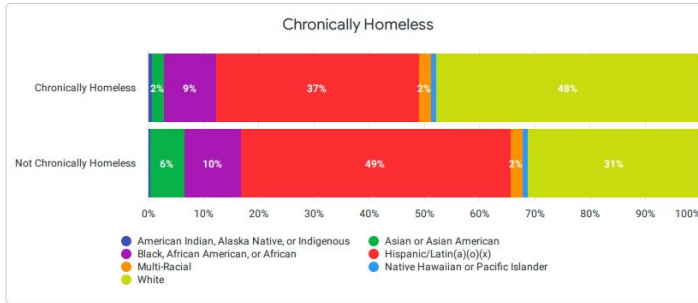
- Report Names:
  - Agency Racial Inequity Dashboard
  - Agency Racial Inequity Dashboard Details
- Reports Location: Reports > Data Analysis > Orange County Clarity System Reports



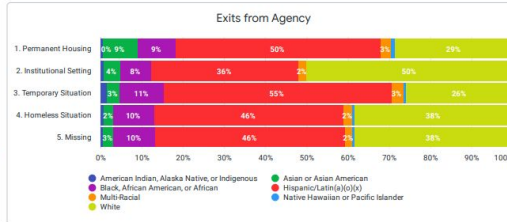
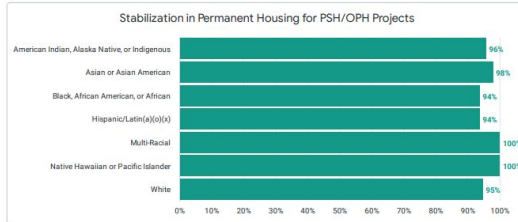
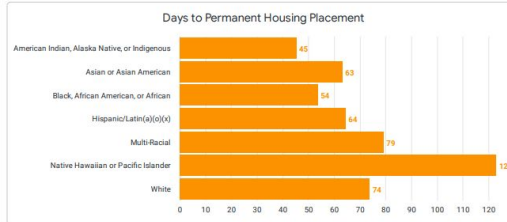
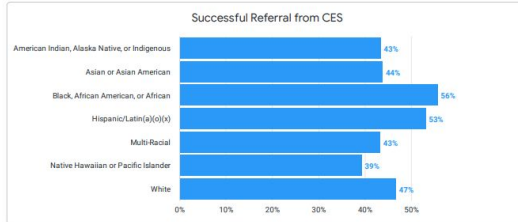
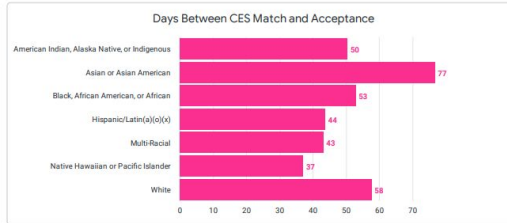
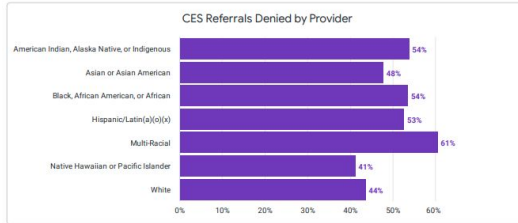
# Active Clients



# Sub-Populations



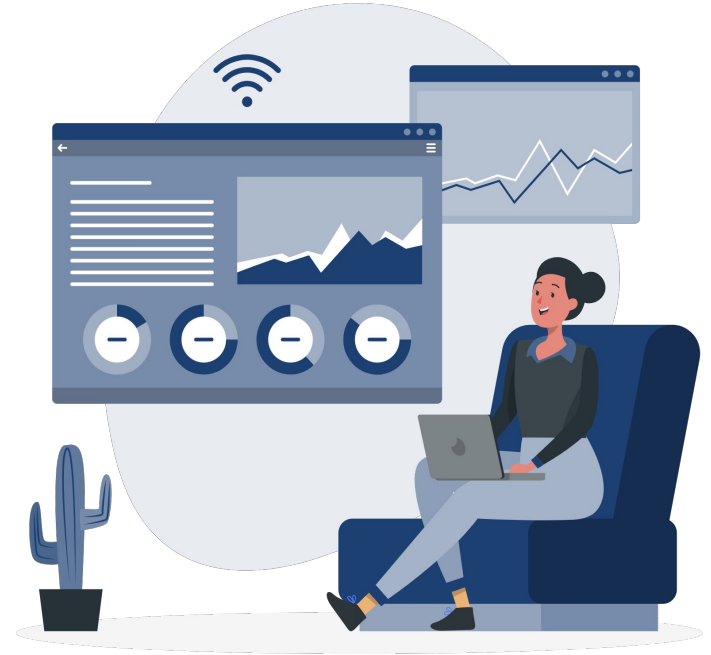
# Performance Measures



# Removing Looker Save Access

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- 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 and Part 2 training course.





# Reactivation of HMIS User Accounts

- 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.

*Congrats!*

**HMIS PART 1  
TRAINING COMPLETE**



**HMIS Part 1 Training Complete!**

# CoC Dashboard

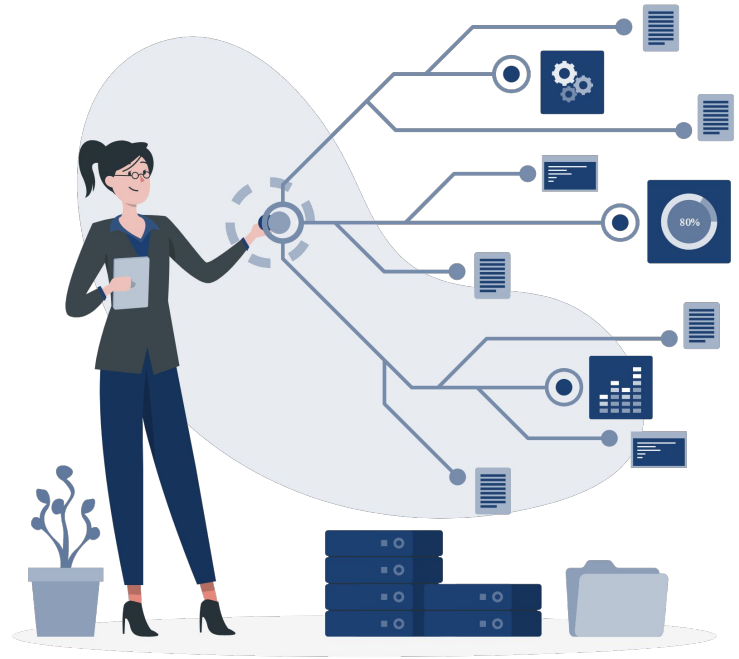
- The CoC Dashboard is now available on the OC HMIS website. The reporting period is [Quarter 2 2022 \(04/1/22 – 06/30/22\)](#)
- The dashboard contains information on the clients who were active in any project type in HMIS or contacted 211OC for information and referral during the reporting period.



# Q2 Data Quality Report Cards

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- Q2 Data Quality Report Cards will be published in the next few weeks
- Thank you all for making corrections to your data!



# In the meantime...

- Review previous Data Quality Report Cards from different quarters
- Monitor your agency's Data Quality anytime by running the **[HUDX-225] HMIS Data Quality Report** in Clarity!

## HUD Reports

v3.5 [HUDX-224] PATH Annual Report [FY 2022]

★ | 🔄 RUN

[HUDX-111] HUD CSV / XML Program Data Export [FY 2022]

★ | 🔄 RUN

**[HUDX-225] HMIS Data Quality Report [FY 2022]**

★ | 🔄 RUN

Export file as Web Page

### Q2. Personally Identifiable Information (PII)

Program Applicability: All Projects

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name (3.1)	2	0	3	5	0.24%
Social Security Number (3.2)	99	0	64	163	7.7%
Date of Birth (3.3)	0	0	4	4	0.19%
Race (3.4)	36	3		39	1.84%
Ethnicity (3.5)	14	2		16	0.76%
Gender (3.6)	0	0		0	0%
Overall Score				197	9.3%

Web Page will allow you to click on the data and direct you to the error in Clarity

# Housing Move In Date Warning Banner

Housing Move In Date Requirements:


- 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 Housing Move Date is before Program Start Date or after Program Exit Date

▲ The Head of Household's 'Housing Move-In Date' entered is prior to their 'Program Start Date'. Please update as applicable.


PROGRAM: TEST - PSH PROGRAM

Enrollment History Provide Services Assessments Notes Files Forms ✕ Exit

Enroll Program for client Firstname Lastname

Project Start Date 08/03/2022 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 07/01/2022 

# Private Client Files

- CES files such as homelessness verification and disability verification should be uploaded as Public
- For clients with private files, the current access point should receive verbal/written consent to re-upload the file as public.
- Notify the HMIS Helpdesk by submitting a ticket or upload **Additional Release of Information** to verify the client has provided consent to share their files. The HMIS Help Desk will assist with reuploading the disability/homelessness verification form.

This screenshot shows a file upload form. The 'Category' is set to 'Coordinated Entry Documentation' and the 'Predefined Name' is 'Homelessness Verification: Third Party'. There is a 'Select File' button and a link for 'Trouble attaching files? Switch to the Basic Uploader'. The 'Private' toggle switch is turned on and is highlighted with a red rectangular box.

This screenshot shows a file upload form titled 'UPLOAD A FILE'. The 'Category' is 'Personal Identification' and the 'Predefined Name' is 'Additional Release of Information (ROI)'. It includes a 'Select File' button and a link for 'Trouble attaching files? Switch to the Basic Uploader'. The 'Private' toggle switch is turned off. At the bottom, there are 'ADD RECORD' and 'CANCEL' buttons.

# Updated Funding Source Linked to Services

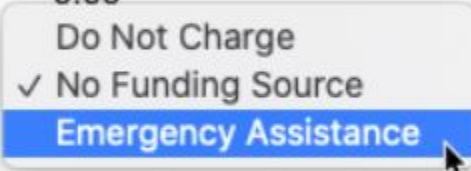
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- The only option selectable in the Funding Source picklist will be those that are actively assigned to the program.
- If you notice that a funding source that you use has been removed from the available options, please let the HMIS Help Desk know by submitting a ticket.

**Expense Amount:** 0.00

**Funding Source:**

**Vendor:**



# 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





# Data Element 4.02 Income and Sources

## Common Errors

- Confusion between SSI, SSDI and Retirement Income from Social Security

## Guidance

**Supplemental Security Income (SSI)** disability benefits are only available to low-income individuals who have either never worked or who haven't earned enough work credits to qualify for SSDI.

**Social Security Disability Insurance (SSDI)** is available to workers who have worked and accumulated a sufficient number of work credits but they are unable to work due to a medical condition.

**Retirement Income from Social Security** is available to workers, employers and the self-employed who pay for the benefits with their Social Security taxes from their working income.

# Data Element 4.02 Income and Sources

## Common Errors

## Guidance

<ul style="list-style-type: none"><li>General Assistance listed as Other income</li></ul>	<p><b>General Assistance (also called General Relief)</b> is a cash assistance program funded by the County of Orange. It provides temporary cash aid to eligible adult lawful residents who do not have custody of any minor children and do not qualify for Federal or State funded cash aid programs.</p>
<ul style="list-style-type: none"><li>No income entered as Other income \$0</li></ul>	<p>Other Income is only for sources of income not listed. Do not use this field to indicate the client has <i>no income</i> (placing \$0 in the field).</p>
<ul style="list-style-type: none"><li>Noncash SNAP not entered for people receiving public assistance</li></ul>	<p>If a client is receiving Public Assistance, Noncash SNAP must be entered.</p>

# 2022 HMIS Agency Audits

- This month we will be continuing to conduct Agency Audits for 2022.
- 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 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

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[Participating Agency Agreement](#)

[Inter-Agency Data Sharing Agreement](#)

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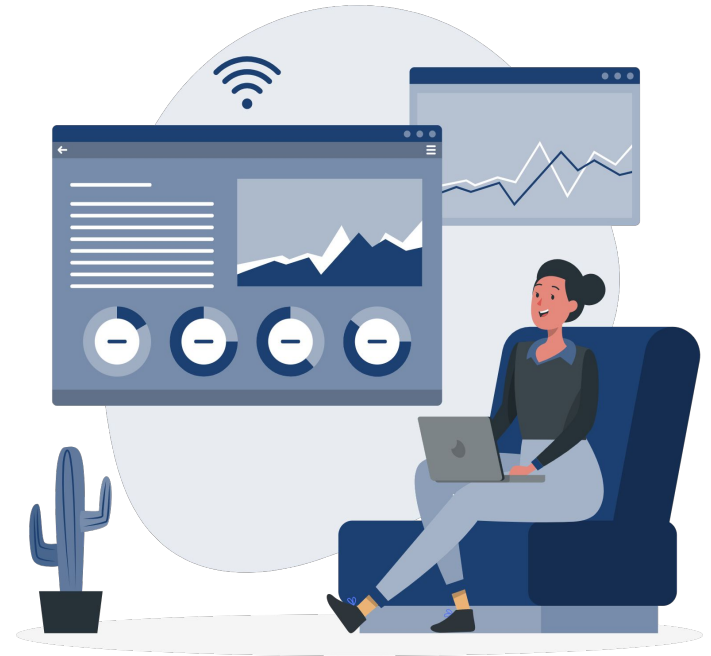


[Test Agency MailChimp Emails.xlsx](#)  
8.9 KB



# Agency Admin Training Video

- Main Responsibilities of the Agency Administrator
  - Provide 1st Tier of Technical Support
  - User Management
- Monitoring Data Quality
  - Concept of Data Quality
  - Components of Data Quality
  - Common Data Quality Issues
- Data Quality Report Cards
- [HMIS Recorded Trainings](#)



# Data & Performance Management Committee Meeting

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## Agenda:

Data & Performance Management Meeting is cancelled for this month.

The Street Outreach PPR will be published next week.

# Labor Day Holiday

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

We will back back in the office to assist you on Tuesday, Sept 6th.





# Q&A

**Reminder: Please enter your agency name in the chat box for attendance**

Thank you  
Have a great day!

Next User Meeting: Sept 7th