

# Welcome!

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October 2022  
OC HMIS User Meeting

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

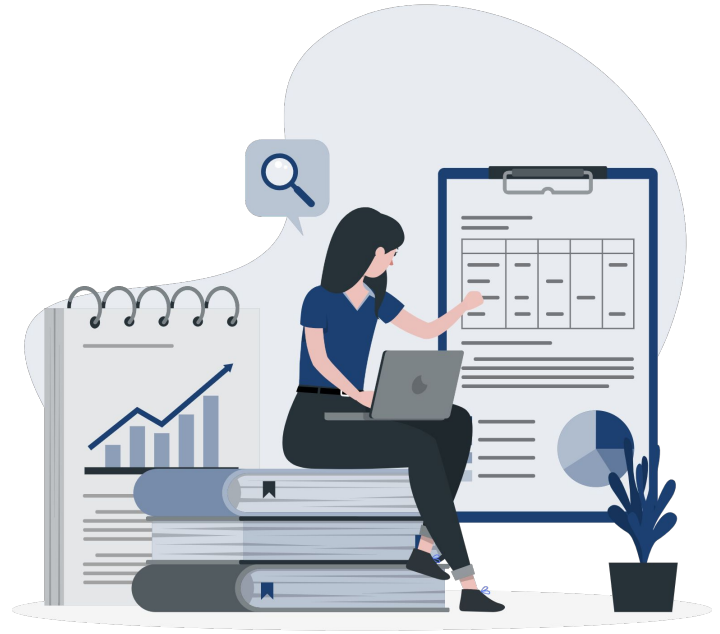


# Agenda

1. Potential Duplicate Client Records
2. Agency Set Up Reports
3. Data Quality Report Cards and SPM
4. HMIS Account Log In
5. Updating Disabling Condition
6. Individual Shelter Bed Reservation Update
7. Bed Reservation Assessment Update
8. Data & Performance Management Meeting Agenda
9. Holiday
10. Q&A
11. Office Hours

# Potential Duplicate Client Records

- In effort to merge duplicate client records, the HMIS Team sent a spreadsheet to agencies for review.
- Identify if the client profiles are of the same client, if so please indicate they are duplicate records and which is the primary profile.
- Spreadsheets are due Oct 14th
  - Upload into DropBox and notify the HMIS Team by submitting a Helpdesk ticket



# Duplicate Client Records

- Before creating a new client profile search to see if a client record already exists
  - KB: [Searching For a Client Record](#)
- Run the Duplicate Clients Report to identify potential duplicate client records
  - Submit a ticket to the HMIS Helpdesk to merge the duplicate records

## SEARCH FOR A CLIENT

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Marge Simpson



Maggie Simpson



Marge Simpson

## REPORT LIBRARY

### Favorite Reports

### Data Quality Reports

[DQXX-103] Monthly Staff Report

★ | ⏪ RUN







[DQXX-110] Duplicate Clients

★ | ⏪ RUN

# Agency Set Up Reports

- Projects are set-up in HMIS using information supplied from the [New Agency/Program Set-Up Form](#). This includes:
  - Program Descriptors
  - Bed Inventory
  - Funding Sources
- To ensure continued HMIS data accuracy, this data is being provided for all existing projects during your Agency Audit.
- Download and validate the data in each file based on current project contracts. Submit corrections and updates during your agency audit or [Submit a Ticket](#) to the HMIS Helpdesk.

Completed by 2110C

<b>Agency Active Users</b>		<b>Additional Agency Access in HMIS:</b>
 <a href="#">Agency Active User</a> 3.5 KB	↓	 <a href="#">Additional Agency Access</a> 14.7 KB
<b>Program Descriptor Data for active projects in HMIS:</b>		<b>Funding Source Data for active projects in HMIS:</b>
 <a href="#">program_descriptor_data.csv</a> 363 bytes	↓	 <a href="#">funding_sources.csv</a> 196 bytes
<b>Bed Inventory Data for active projects in HMIS:</b>		<b>Email Addresses receiving emails from 2110C</b>
 <a href="#">bed_inventory.csv</a> 297 bytes	↓	 <a href="#">Email Communications</a> 1.9 KB

# Agency Set-Up Review Dashboard

- This dashboard provides you a better overview of your agency's project set up in Clarity. As well as your agency's funding sources and bed inventory.
- The dashboard contains three sections: Program Descriptor Data, Funding Sources, and Bed Inventory.
- The dashboard can be found under Reports >> Data Analysis >> Orange County Clarity System Reports >> Agency Management >> [Agency Set-Up Review](#)



# Agency Set-Up Review Dashboard

## Program Descriptor Data

Agency Name	Project Name	Project Type Code	Target Population	Geocode	Site Name	Address	City	ZIP Code	State	Housing Type	Is HMIS Participating Project	Operating Start Date	Operating End Date
Agency 1	Project 1	Emergency Shelter	Not Applicable	69059	Test ES	1234 Test St.	Santa Ana	92705	CA	site based - single site	Yes	2/8/2016	
Agency 1	Project 2	Permanent Supportive Housing	Not Applicable	69059	Test PSH	5678 Test St.	Santa Ana	92705	CA	site based - single site	Yes	1/4/2014	

## Funding Sources

Agency Name	Project Name	Amount	Funding Source	Non Federal Funding Source	Funding Source Start Date	Funding Source End Date	Grant Amount	Grant Identifier	Grant Start Date	Grant End Date
Agency 1	Project 1		ESG		10/1/2018		\$0.00	72635	10/1/2018	
Agency 1	Project 2		CoC		10/1/2020		\$0.00	23518	10/1/2020	

# Agency Set-Up Review Dashboard

Bed Inventory															
Agency Name	Project Name	Bed Type	Availability	Household Type	Inventory Start Date	Inventory End Date	Total Bed Inventory	Total Unit Inventory	Non-Dedicat ed Beds	Veteran Beds	Youth Beds	Youth Veteran Beds	Chronically Homeless Beds	Chronically Homeless Youth Beds	Chronically Homeless Veteran Beds
Agency 1	Project 1		Year-Round	Households with at least one adult and one child	1/25/2021		30	8	30						
Agency 1	Project 1		Year-Round	Households without children	1/25/2021		10	10	10						
Agency 1	Project 2			Households without children	1/25/2021		40	40					20		20



# Data Quality and SPM Corrections

- HMIS Data Quality Report Corrections
  - Universal Data Standards
    - Name
    - DOB
    - SSN
  - Program Specific Data Elements at Entry and Exit
  - Data Timeliness
    - the degree to which the data is collected in HMIS and available when it is needed (3 days)



# Data Quality and SPM Corrections

- System Performance Measures
  - **1a** - LOS in ES and TH projects
  - **1b** - LOT between Approx. Date of Homelessness Started and Project Start Date plus the LOS for ES/TH or LOT between Approx. Date of Homelessness Started and Housing Move-In Date for PH
  - **2** - Indicates whether or not the client returned to homelessness after exiting to a permanent housing destination
  - **4.3 & 4.6** - Determines whether or not clients in PH projects reported increased income during enrollment or at exit



# Data Quality and SPM Corrections

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- System Performance Measures
  - **7a1** - Determines the number of clients that exited SO projects to successful destinations
  - **7b1** - Determines the number of clients that exited ES, TH, and RRH projects to permanent housing destinations.
  - **7b2** - Determines the number of clients that stabilized in permanent housing during the reporting period.



# HMIS Account Log In

## Disabled due to Inactivity

- If you receive an error that your account has been disabled due to inactivity, or if you receive the email below, your HMIS account has been deactivated.
- This will occur if you have not logged into HMIS for 60 days, or if your account was reactivated and you did not log in within 24 hours.
- If you have not logged into HMIS within 60 days you will need to complete the [required HMIS Trainings](#) to gain access to HMIS. If your account was reactivated and you did not log in within 24 hours, please ask your Agency Administrator to submit a ticket to reactivate your account.



Dear User,

Your account has been disabled due to inactivity.

Account de-activation occurs when you do not access your account during the inactivity policy period specified by your System Administrator. You last accessed Orange County Clarity System on 07/11/2022.

Orange County Clarity System Team

# HMIS Account Log In

The **HMIS Account Update & Testing Form** has been updated to include a new question asking for confirmation if a new user has ever had an HMIS user account at any agency that had previously participated or is currently participating in OC HMIS

## This HMIS User Is: \*

- A new HMIS User
- Completing HMIS User Recertification
- Completing HMIS training again due to inactivity
- An existing and active HMIS user who needs Agency Administrator access
- An existing and active HMIS user who needs access to the Individual Coordinated Entry System
- An existing and active HMIS user who needs access to the Family Coordinated Entry System
- An existing and active HMIS user who needs access to both Family and Individual Coordinated Entry Systems
- An existing and active HMIS user who needs access to my agency
- An existing and active HMIS user who needs a different access role (specify change of access role in comments)
- No longer employed by our agency
- No longer in need of access to HMIS as part of their primary job duties
- Other

## Has this user ever had an HMIS account at any agency that has participated or is participating in OC HMIS? \*

- Yes
- No

# Updating Disabling Condition

When you need to update a client's disabling condition there are different processes based on the type of update that is needed.

- If the client always had a disabling condition but it wasn't noted in their program enrollment then you would update the enrollment screen.
- If the client had a change in their status after the enrollment then you would add a Status Assessment with their disabling condition.

For additional information, review the [Disabling Condition Field KB](#)



# Bed Reservation System 10/05/22 Updates



coordinated  
ENTRY SYSTEM

# Bed Reservation System



## Updates

- The Shelter Bed Reservation System for individual households has been live and accepting households onto the Bed Reservation Community Queue since September 20th, 2022.
- Match emails for Huntington Beach Oasis are currently ongoing with a move-in date starting October 4<sup>th</sup>, 2022
- Occupancy for Anaheim North Harbor will start approximately Mid October. Match emails will start being sent out within the next two weeks.



# Bed Reservation System



## Reminders

- The Bed Reservation System follows current Coordinated Entry System (CES) Prioritization Policies
- Households must have Homelessness Verification or Chronically Homeless Verification form on file in HMIS before being placed onto the community queue.
- The "Needs Bed Reservation Assistance" service is required to be included on the bed reservation system community queue and the service needs to be updated on a weekly basis to ensure that clients are active and interested in shelter.

Questions can be sent via email at  
[coordinatedentry@ochca.com](mailto:coordinatedentry@ochca.com)

Office of Care Coordination  
[coordinatedentry@ochca.com](mailto:coordinatedentry@ochca.com)

# Bed Reservation Opportunity Update

- New fields have been added in HMIS to distinguish between Individual and Family Bed Reservation Opportunities
- When adding a bed reservation opportunity, housing providers can choose to indicate whether the opportunity is for families or individuals.
- For more information, please refer to the [Community Queue for Housing Agencies KB](#)

## ADD AN OPENING

Date

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Additional Notes

Household must have  
Child under age 6



City Preference

Opportunity is for  
Family Bed Reservation



Maximum size of  
household that can  
occupy unit

Opportunity is for  
Individual Bed  
Reservation



# Bed Reservation Assessment Update

- Four Assessment Questions have been added to the Bed Reservation Assessment for both Family and the New Individual Bed Reservation Project:
  - Assessment Date
  - Assessment Level
    - Crisis Needs Assessment
    - Housing Needs Assessment
  - Assessment Location
  - Assessment Type
- Please refer to the [Adding Households to the Bed Reservation Community Queue](#) KB for additional information.

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment History Provide Services **Assessments** Notes Files Forms

[OC CUSTOM] INDIVIDUAL BED RESERVATION ASSESSMENT

Assessment Date	10/03/2022	
Assessment Level	Select	▼
Assessment Location	Select	▼
Assessment Type	Select	▼

Has anyone in the household ever been convicted of a felony? Select ▼

Does anyone in this household currently have an open warrant? Select ▼

Is any adult in the household a registered sex offender? Select ▼

Does the household require any special accommodations? Select ▼

DOES THE HOUSEHOLD INCLUDE ANY OF THE FOLLOWING:

Pets

Service Animals

Emotional Support Animals

WHICH OF THE SHELTER TYPES IS THE HOUSEHOLD INTERESTED IN? PLEASE SELECT ALL THAT APPLY

Are you interested in a concrete shelter?

# Data & Performance Management Committee Meeting

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## Agenda:

1. Coordinated Entry UDE Data Quality Threshold
2. OC vs. National CES Referral Success Rates
3. PSH/OPH Project Performance Reports

**Thursday, October 13th at 1:30 - 3:00 PM**

Click [here](#) to Join!

Meeting ID: **810 9405 7685**

Passcode: **625080**

# Indigenous Peoples Day Observed

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The HMIS Help Desk will be closed on **Monday, Oct 10th** in observance of Indigenous Peoples Day.

We will back back in the office to assist you on Tuesday, Oct 11th.



# Q&A

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

Thank you  
Have a great day!

Next User Meeting: Nov 2nd



# Office Hours