OC HMIS User Meeting Webinar Minutes
12/7/22

Contents

Agenda Items

OC HMIS Policies & Procedures Updates
The HMIS Policies and Procedures has been updated to include the Data Integration and Data Breach policies.

Data Integration is the exchange of data between other case management softwares and HMIS. Requests for data integrations must be submitted through the Data Integration Request Form. Requests are decided by the CoC Board in conjunction with the CoC Lead and the HMIS Lead. This policy doesn't impact an agency's ability to export their own data out of HMIS.

Data breach is the unauthorized access or acquisition of data that compromises the security, confidentiality, or integrity of data in HMIS. Examples of data breaches that can occur at agencies include sharing HMIS accounts and passwords, sharing client identifying data with anyone not approved to access it, sharing client identifying data over unencrypted email, or leaving client files in an unsecured location. Suspected data breaches should be reported to the HMIS team through the Data Breach Incident Report. The HMIS team will support the agency with mitigating the data breach as much as possible. Data breaches will also be shared with the Agency Access Working Group to determine if corrective action is necessary.

2023 HIC and Sheltered PIT

The night of the count is January 23rd and the following project type are required to participating in the 2023 HIC and Sheltered PIT:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

Action that could be done now are as follow:

- Complete data entry and data clean-up in HMIS
- Set-up new agencies and projects as needed
- Close projects that are no longer active

2023 HIC and Sheltered PIT Reporting Timeline:

- Jan 19th - HIC/Sheltered PIT Training
- Jan 23rd - Night of Count
- Jan 26th - Agencies complete data entry into HMIS/comparable database
- Jan 27th - 211OC sends HIC Forms (all agencies) and PIT data (HMIS agencies)
  - HIC Forms are now Cognito forms which will be more user-friendly and each project will be record on a separate form
- Phase 1: Jan 27th - Feb 10th Agencies review/correct HIC Form and PIT data as needed
- Phase 2: Feb 13th - Mar 15th 211OC reviews forms and works with agencies as needed
- Phase 3: Mar 16th - 211OC completes HDX data entry
  - Mar 24th - 211OC sends HDX data to agencies for confirmation
  - Mar 31st - Agencies confirm HDX data matches the final HIC Answer Form

Thank you to the following agencies that participated in the HIC PIT Focus Group to provide assistance to the 211 OC HMIS Team with streamlining the upcoming HIC and Sheltered PIT reporting process.

- Families Forward
- Illumination Foundation
- Mercy House
- Orange County Asisan and Pacific Islander Community Alliance
- Pathways of Hope
- US Veterans Initiative

LSA Corrections

The HMIS Team will continue to work with agencies that have error and warning flags to collect information to resolve errors and submit explanations for the LSA report.

HMIS Part 2 Recertification

The 2022 HMIS Part 2 Recertification is now available.

- Users with Read Only accounts or accounts created on or after June 1st are excluded from this requirement.
- Agency Administrators must submit the 2022 HMIS Part 2 Recertification Form for their users.
- Users that do not complete the recertification by January 31st will have their accounts locked until the Recertification is completed.

Bitfocus Email Update

Bitfocus updated their email address to noreply@bitfocus.com

Possible Action: If you have previously added an exception to an allowlist or firewall for "notifications@clarityhumanservices.com", you will need to update those to now accept emails from "noreply@bitfocus.com" to ensure you continue to receive scheduled reports and notifications.

New Clarity Log In Screen Note

A new Clarity Login Screen message has been added to assist users with login issues.

The message includes the following helpful tips:

- Reference to the Troubleshooting Logging into HMIS KB
- A reminder to contact your Agency Administrator
- Username and password guidelines
- User login attempt threshold

HappyFox Updated Link

The SSL security certificate was updated for the Ticket Submission page and all Knowledge Base articles. If you get an error message when loading the links from our OC HMIS website, please clear your web browser cache and try the link again. If you bookmarked these pages you will need to update the links to the following websites

Ticket Submission: https://ochmis-211oc.happyfox.com/new/

Knowledge Base Articles:https://ochmis-211oc.happyfox.com/

Proposed Changes to Race, Ethnicity and Gender Identify - HMIS

HUD is currently accepting feedback about proposed changes to the following data elements. If you would like to provide feedback about these proposed changes please submit an HMIS Helpdesk ticket with the subject Proposed Changes to Data Elements Feedback by December 16, 2022

For more information about the proposed changes, please refer to this link Community Support to Gather Feedback on Proposed Changes

- Proposed Change to Race and Ethnicity
- Proposed Change to Preferred Language
- Proposed Change to Gender

Project Setup Form Update

The Agency/Project Setup Form has been updated to include a new warning. The warning will appear when CoC or ESG funds are selected for a project type that is not allowable. Please refer to your grant funding to ensure that you select the correct funding source.

CES Pregnancy Field

Due to a reporting issue, the Pregnancy field on the Family Coordinated Entry Enrollment screen was replaced with a new Pregnancy field.

The migration of the pregnancy data to the new field on the Family CES enrollment screen has been completed and the old data field has been removed from the Enrollment screen.

This data can now be included in Looker reports as needed.

Updating Client Contact

Please ensure that all participants on the community queue have updated and accurate contact information. If the participant does not have contact information, the current case manager or alternate contact information should be added.

Knowledge Base Article: Client Contact Information

Current Living Situation

The Current Living Situation assessment is a required step in project enrollment for all Heads of Households and Adults enrolled in one of the following project types:

- ○ ESG-funded Street Outreach
- ○ ESG-funded Night-by-Night Emergency Shelters
- ○ PATH-funded projects (all project types)
- ○ Coordinated Entry System

- The first CLS assessment date should match the client's Project Start Date and the information about the client's living situation should match the information given on the enrollment page
- Subsequent CLS assessments need to be completed after every client contact for clients participating in ESG funded street outreach or PATH funded projects.

- Subsequent CLS assessments for CES clients should be completed when a CE event is recorded, a client's Current living situation changes, or every 90 days.

For more information regarding current living situation assessments as well as a detailed walkthrough, please refer to our KB article on Current Living Situation Assessments

Street Outreach Data Collection and Exit Process

Some project types are more complex and require additional data collection instruction.

Contacts

- Street outreach projects are expected to record every contact made with each client in the HMIS via data element 4.12 Current Living Situation
- A contact is defined as an interaction between a worker and a client designed to engage the client
- Contacts include activities such as
    - ○ conversation between the street outreach worker and the client about the client's well-being or needs
    - ○ an office visit to discuss their housing plan
    - ○ a referral to another community service
- A Current Living Situation (4.12) must be recorded anytime a client is met, including when a Date of Engagement (4.13) or Project Start Date (3.10) is recorded on the same day.

Engagements

- Most street outreach projects are expected to record the Date of Engagement (4.13) with each client in the HMIS.
- By HMIS Data Standards, an engagement date is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.

- The Date of Engagement should be entered into HMIS at the point that the client has been engaged by the outreach worker.
- This date may be on or after the Project Start Date (3.10) and must be prior to the Project Exit Date (3.11).
- If the client exits without becoming engaged, the Date of Engagement should be left blank. Assuming the client was contacted on the date of engagement, a Current Living Situation (4.12) must also be entered for that date.

Data Quality

- Reporting on data quality for street outreach projects is limited to clients with a Date of Engagement (4.13).
- Therefore, it is important that outreach workers record the Date of Engagement and also review all Universal Data Elements and applicable Program Specific Data Elements for completeness and accuracy.
- The Date of Engagement coincides with the requirement for HMIS data quality; therefore, all Universal Data Elements should be entered into HMIS on or before the Date of Engagement

Project Exit

Project exit represents the end of a client's participation with a project. This standard should be applied consistently across all Street Outreach projects.

Reasons to exit a client include:

- The client has entered another project type (e.g., TH, PSH) or otherwise found housing
- The client is engaged with another outreach worker or project
- The client is deceased
- The outreach worker has been unable to locate the client for an "extended period of time" and there are no contacts recorded in the Current Living Situation (4.12) in that period.
    - The CoC must be involved in the determination of "extended length of time" and to which projects the solution is to be applied (e.g. 90 days from last contact for every street outreach project)

Exit Process

One of the measures that our CoC reviews in the Project Performance Reports, is Length of Stay [in project], and HUD reviews Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing within their System Performance Reports. For these reasons, it is very important to know at what point a client, enrolled in a Street Outreach Project, should be exited because it will vary depending on their Destination.

It is important to exit clients from Street Outreach (SO) projects when they have been housed in the project they were referred to, with the exit Destination of the appropriate project type. Clients enrolled in Street Outreach projects should be exited in the following manner:

- If a client is referred to an Emergency Shelter (ES) or Transitional Housing (TH) project, the client should be exited on the date the client enrolled into the ES or TH project.
- If the client was referred to a Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH), or Other Permanent Housing (OPH) project, the client should be exited from the SO project with an exit date of the client's Housing Move-in Date in the project they were referred to.
- If staff has not made any contact with the client within 60 days of the last contact date

If the client is placed in an ES or TH project, there should be no overlap between the client's SO enrollment and their ES or TH enrollment. If the client is placed in a RRH, PSH, or OPH project, there will most likely be some overlap between the SO enrollment and the PH enrollment because clients are not usually placed in a PH unit on their first day enrolled in a PH project.

Why is Street Outreach Exit Process So Important?

Exiting a client correctly ensures that the work being done by Street Outreach projects is reflected on the System Performance Report; exiting clients to ES, TH, or PH is considered a successful placement for SO projects!

Please refer to the [HMIS Data Standards Manual](#) and the [Street Outreach Exing Protocol Knowledge Base article](#) for more information on this process!

Data & Performance Management Meeting Agenda
The Data & Performance Management Meeting will be held on Thursday, December 8th at 1:30 - 3:00 PM. The Agenda is as follows:
- Data Quality Plan
- [TH Project Performance Report](#)

Click [here](#) to Join!
Meeting ID: 810 9405 7685
Passcode: 625080

Winter Holiday
The HMIS Help Desk will be closed on Monday, December 26th in observance of Christmas and Monday, January 2nd in observance of New Years.

We will be back in the office to assist you on Tuesday, December 27th and Tuesday, January 3rd, respectively.

Q&A
- Q: Is there a list of the shelters that are participating in the shelter PIT?
    - A: All Emergency Shelters in Orange County participate in the HIC and sheltered PIT, this includes projects that are not in HMIS. For a list of agencies that participated in the last HIC/PIT,

please refer to the [2022 HIC](#).

- Q: What is an example of when you would delete the contact?
    - A: There is an option to delete the contact. To preserve the history of the contacts, you should deactivate the contact. But the contact can be deleted on an as needed basis at the discretion of each agency.

- Q: For CM contact this would only be for a contact that isn't connected to HMIS vs. entering in Care Team contacts?
    - A: You would select the best option in the picklist for the Contact Type. There is also a Note section where any clarifying notes can be added for reference.

- Q: Could you also talk about what to do when a participant's status changes from literal to at risk or vice versa in coordinated entry?
    - A: If a client's status changes from homelessness to at risk or from at risk to homelessness, the process is for the agency to exit the client from the Coordinated Entry System (CES) and then re-enroll the client with their new status. The reason for exiting the client is because the housing opportunities they are eligible for have changed and the Coordinated Entry process is different. If the client is homeless, which is the process most of you are familiar with, they do the enrollment, the CES assessment, and they get housed with an opportunity. There is a separate process for prevention clients or clients at risk of homelessness, they still do the enrollment but there is a separate assessment for prevention that has to be completed so that they can go through that process. If the client is going from one homeless situation to another homeless situation then you would do a new Current Living Situation (CLS) assessment.

- Q: What about for long term emergency shelters, like project Homekey?
    - A: Emergency Shelter is still a homeless situation, it doesn't matter if it is longer term. You would only need to complete the CLS every 90 days if the client remains in the Coordinated Entry project for that long. The CLS would be emergency shelter.

- Q: When the CLS Assessment is completed, will this or should this automatically update the Last Activity Date in order to keep a family/client active within HMIS?
    - A: Yes it will. Please review: [Maintaining Households on the Community Queue](#)

- Q: Do care coordination programs need to complete CLS assessment?
    - A: Any agency that is participating as an Access Point in the CES needs to do the CLS assessment regardless of your funding source. Since you are participating in Coordinated Entry it is a requirement. ESG-funded Street Outreach projects, ESG-funded Night by Night Emergency Shelters and PATH-funded projects need to complete the CLS assessment.

- Q: For the street outreach exit, would being matched to a RRH project require an exit from Street Outreach? Or would this happen once a client is housed in the RRH project?
  - A: The client will be exited once they're moved into the housing unit. So the exit date from Street Outreach would match the move in date for the Rapid Rehousing Project. If a Street Outreach enrollment is being exited after 60 days of no contact. The exit date should be the date of their last service which can be found in the History tab. If the entry date was the last contact after 60 days then you would use the exit date to match the entry date.

- Q: If the data specialists are keeping CLS updated for SO, is it possible to have an automatic program exit if there is no CLS within 75 days? I'm saying 75 days to allow for the receipt of late HMIS exit forms.
  - A: Yes you can if you are interested in setting that up for your project. We caution against setting up an automatic exit because all the exit data is blank.

- Q: Is that similar for Coordinated Entry projects? Regarding the exit date being the last contact date.
  - A: Yes.

- Q: If the exit date is set to be the last service date, does it matter that additional case notes might be completed after the exit date then? Sometimes, our staff will case note conversations that we have about certain clients that have been MIA.
  - A: For some projects, you can add case notes after the exit date. The Case Notes screen should be used for more internal conversations.

- Q: Do SO programs have an exception for entering exits within a 3 day window? For SO exits, if an exit was backdated to the last service date due to no contact, that would conflict with the window frequently.
  - A: For the data timeliness goal, the exits should occur within 3 days. For Street Outreach clients the 3 day timeliness window is extended because contact can be within a 60 day window.

Future Meeting Information
January 2023 HMIS User Meeting Webinar
- Date: Wednesday, Jan 4th, 2023
- Time: 10:00 AM - 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.