

Welcome!

December 2022
OC HMIS User Meeting

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



Agenda

1. OC HMIS Policies & Procedures Updates
2. 2023 HIC and Sheltered PIT
3. LSA Corrections
4. User Recertifications
5. Bitfocus Email Update
6. New Clarity Log In Screen Note
7. HappyFox Updated Link
8. Proposed Changes to Race, Ethnicity and Gender Identify - HMIS
9. Project Setup Form Update
10. CES Pregnancy Field
11. Updating Client Contact
12. Current Living Situation
13. Street Outreach Data Collection and Exit Process
14. Data & Performance Management Meeting Agenda
15. Winter Holiday
16. Q&A
17. Office Hours

HMIS P & P: Data Integration Policy

- Exchange of data between other case management software and HMIS
- Requests must be submitted through [Data Integration Request Form](#)
- Requests are decided by CoC Board, CoC Lead, and HMIS Lead



HMIS P & P: Data Breach Policy

- Examples of potential agency data breaches:
 - Sharing HMIS accounts and passwords
 - Sharing client identifying data with anyone not approved to access the data
 - Sharing unencrypted client identifying information over email
 - Leaving client files in unsecured location
- Report suspected data breaches by submitting the [Data Breach Incident Report](#)



2023 HIC and Sheltered PIT

Who should participate?

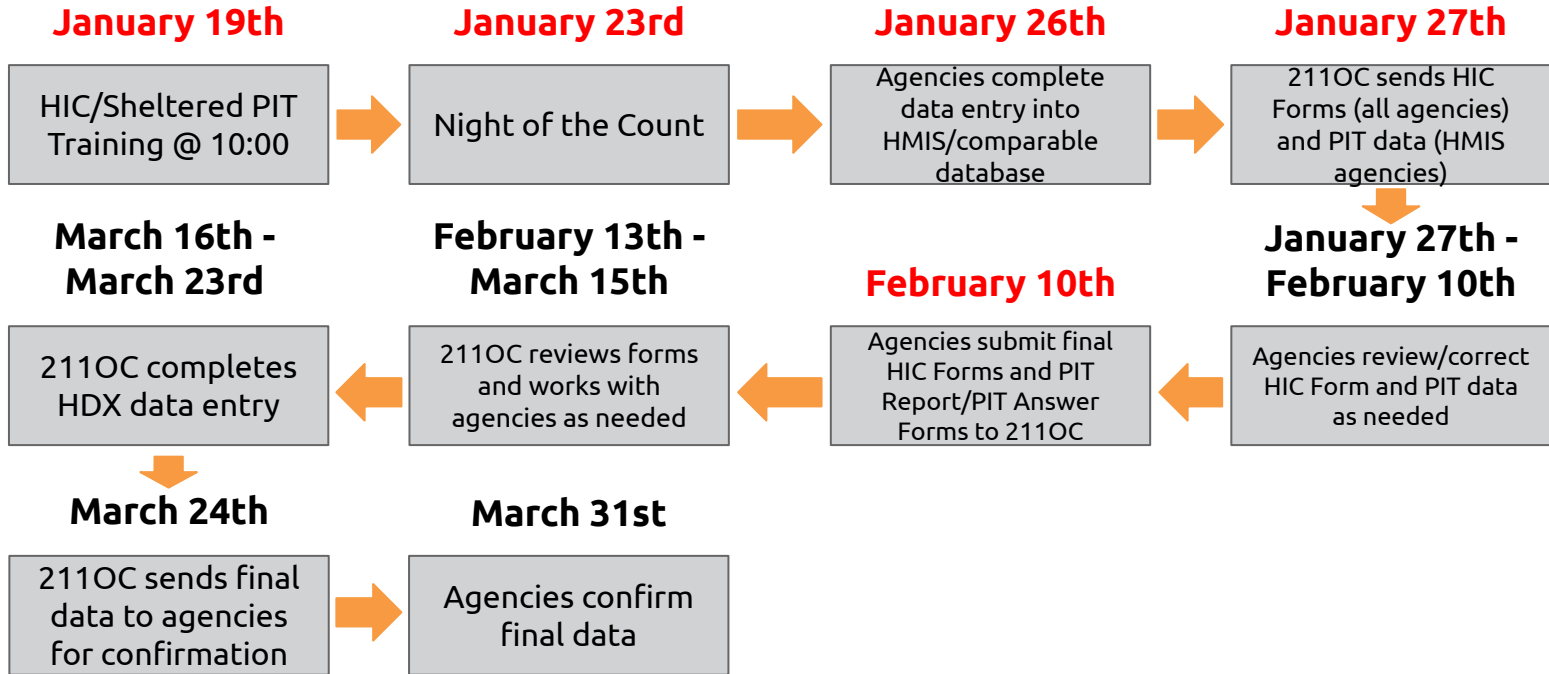
Agencies with any of the following project types, whether or not the projects are in HMIS:

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

What can I do now?

- 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- Close projects that are no longer active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 Timeline



HIC PIT Focus Group

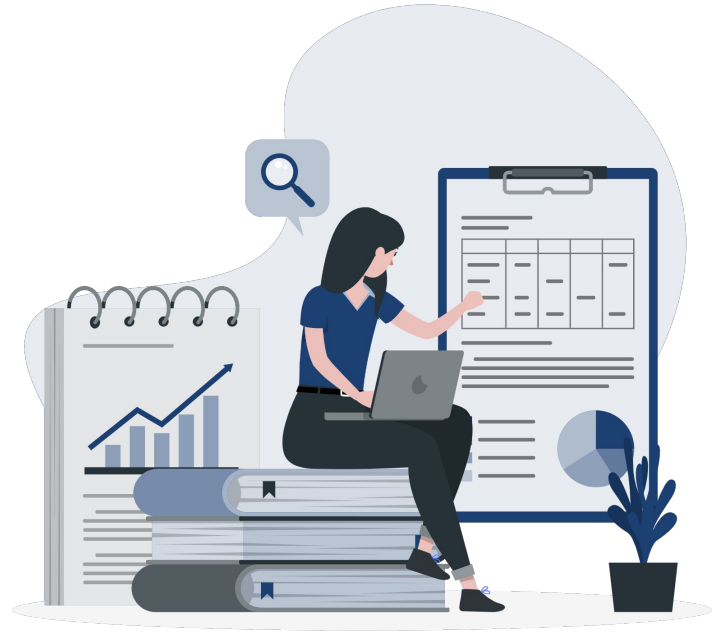
Thank you to the following partner agencies for their participation and feedback that supported with the streamlining 2023 HIC PIT reporting process.

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



Longitudinal Systems Analysis (LSA)

- LSA reporting period 10/1/21 - 9/30/22
- Round 2 of corrections
 - Warnings that need explanations
 - Bed Inventory
 - Utilization
 - Length of Stay



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.

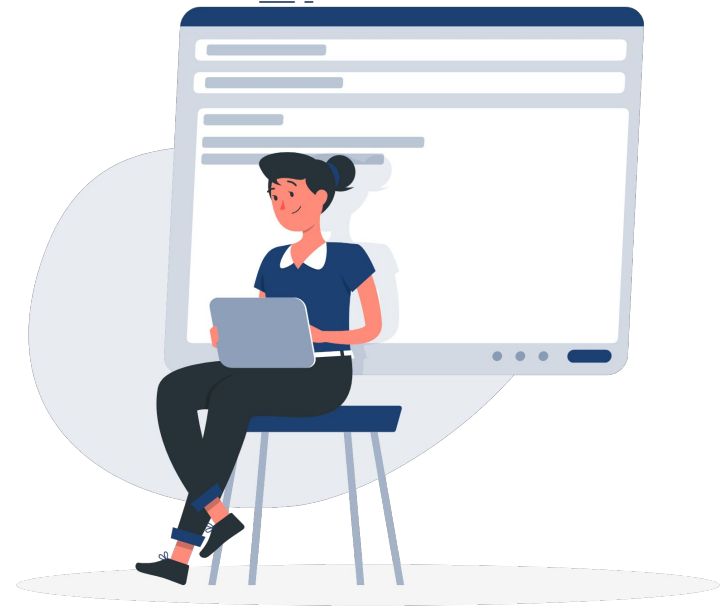


Bitfocus Email Update

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.

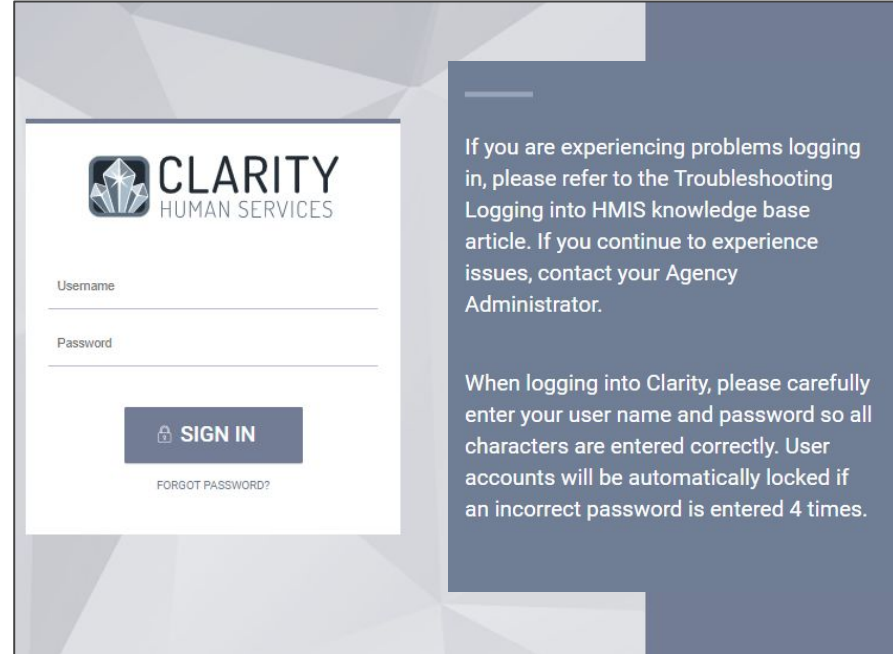


Clarity Login Screen Update

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



Updated Links for Ticket Submission and KBs

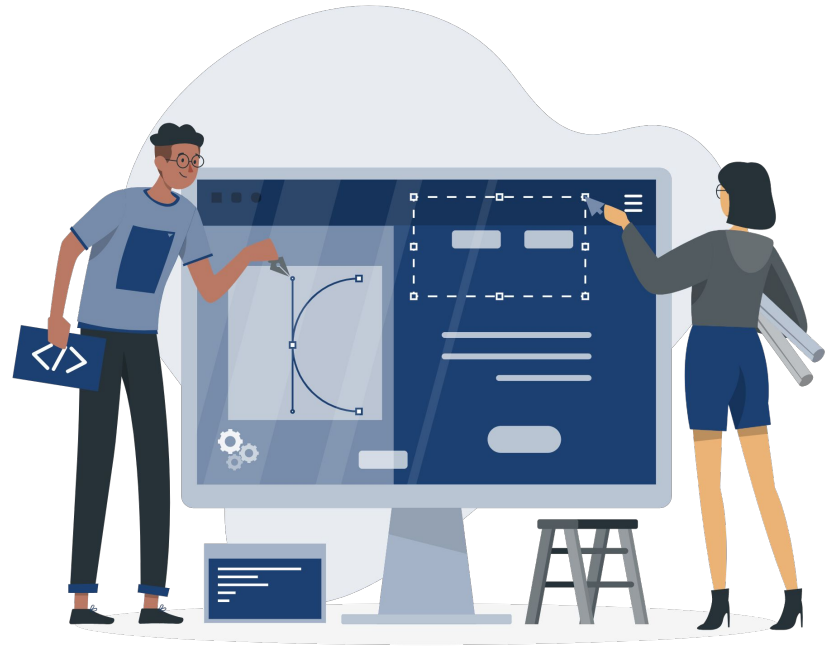
The SSL security certificate was updated for the Ticket Submission page and all Knowledge Base articles. If you get an error message when loading the links from our OC HMIS website, please clear your web browser cache and try the link again. If you bookmarked these pages you will need to update the links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

Ticket Submission

<https://ochmis-211oc.happyfox.com/new/>

Knowledge Base Articles

<https://ochmis-211oc.happyfox.com/>



Proposed Changes to Data Elements

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

- Race and Ethnicity
- Preferred Language
- Gender

For additional information on these changes, please refer to [Community Support to Gather Feedback on Proposed Changes](#)



Project Set Up 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.

Grant 1

Grant Identifier/Name

Funding Source *

HUD: ESG-CV

If your contract includes a grant number, please enter it here.

You selected HUD: ESG or HUD: ESG-CV funding as a funding source for this project, but the project type entered is not an allowable project type to receive these funds. Please change the project type or the funding source to continue.

Grant Amount

Grant Start Date *

Grant End Date

Grant 2

Grant Identifier/Name

Funding Source *

HUD: CoC

If your contract includes a grant number, please enter it here.

You selected HUD: CoC funding as a funding source for this project, but the project type entered is not an allowable project type to receive CoC funds. Please change the project type or the funding source to continue.

Updating Client Contact Information

Notice from CES Newsletter:

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](#)

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES **CONTACT** LOCATION

CLIENT CONTACTS

ADD CONTACT (+)

ADD CONTACT

Contact Type Client

Email

Phone (#1) XXX-XXX-XXXX

Phone (#2) XXX-XXX-XXXX

Active Contact

Private

Contact Date

Note

B *I*  

SAVE CHANGES

CANCEL

FCES Pregnancy Field Update

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 FCES enrollment screen has been completed and old data field has been removed from the Enrollment screen.

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



Current Living Situation

- The Current Living Situation assessment is required 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
- Current Living Situation (CLS) assessments must be completed by case managers upon program enrollment and after each contact.
- 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

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](#)

When to Complete Current Living Situation

- The first Current Living Situation record with the client must be recorded upon enrollment.
- Subsequent CLS Assessments should be completed in the following situations:

ESG-funded Street Outreach projects	<ul style="list-style-type: none">• After every contact made with the client
ESG-funded Night-by-Night Emergency Shelters:	<ul style="list-style-type: none">• When the interaction between the shelter personnel and client went beyond a basic provision of shelter services
PATH-funded projects (all project types)	<ul style="list-style-type: none">• After every contact made with the client
Coordinated Entry System:	<ul style="list-style-type: none">• When a CES Assessment or Coordinated Entry Event is recorded.• When the client's living situation changes• If a CLS assessment hasn't been recorded for longer than 90 days

Street Outreach Data Collection

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 a 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, or 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

Street Outreach Data Collection

Engagements

- 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
- If the client was contacted on the date of engagement, a Current Living Situation (4.12) must also be entered for that date

Street Outreach Data Collection

Data Quality

- Reporting on data quality for street outreach projects is **limited to clients with a Date of Engagement** (4.13)
 - 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**

Street Outreach Data Collection

Project Exit

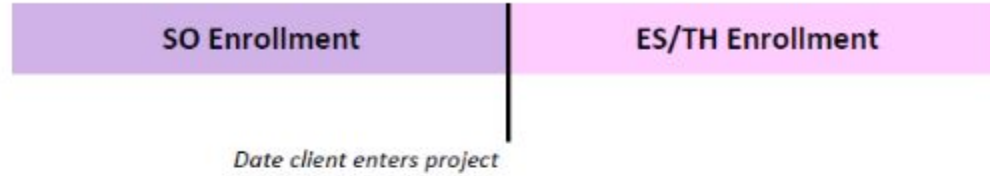
- The exit date should coincide with the date that the client is **no longer** considered to be **participating in the project**
- Reason to exit a client include:
 - The client has entered another project type (e.g., TH, PSH) or otherwise found housing
 - The client is engaged with another outreach 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. 60 days from last contact for every street outreach project)

Street Outreach Exit Process

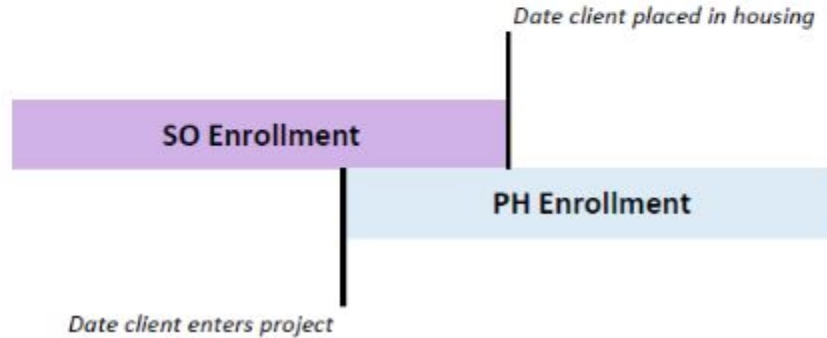
Clients enrolled in Street Outreach projects should be exited in the following manner:

- 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, the client should be exited on the last service date

ES/TH



RRH/PSH/OPH



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 the Street Outreach Exit Process 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!

Destination	Positive or Negative Placement?
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	+
Foster care home or foster care group home	+
Hospital or other residential non-psychiatric medical facility	NA
Hotel or motel paid for without emergency shelter voucher	+
Jail, prison or juvenile detention facility	-
Moved from one HOPWA funded project to HOPWA TH	+
Place not meant for human habitation	-
Psychiatric hospital or other psychiatric facility	+
Residential project or halfway house with no homeless criteria	NA
Safe Haven	+
Staying or living with family, temporary tenure (e.g., room, apartment or house)	+
Staying or living with friends, temporary tenure (e.g., room apartment or house)	+
Substance abuse treatment facility or detox center	+
Transitional housing for homeless persons (including homeless youth)	+
Long-term care facility or nursing home	+
Remove from the denominator	+
Moved from one HOPWA funded project to HOPWA PH	+
Owned by client, no ongoing housing subsidy	+
Owned by client, with ongoing housing subsidy	+
Permanent housing for formerly homeless persons	+
Rental by client, no ongoing housing subsidy	+
Rental by client, with GPD TIP housing subsidy	+
Rental by client, with other ongoing housing subsidy	+
Rental by client, with VASH housing subsidy	+
Staying or living with family, permanent tenure	+
Staying or living with friends, permanent tenure	+
Deceased	NA
Client doesn't know	-
Client refused	-
Data not collected	-
No exit interview completed	-

Data & Performance Management Committee Meeting

Agenda:

1. Data Quality Plan
2. TH Project Performance Reports

Thursday, December 8th at 1:30 - 3:00 PM

Click [here](#) to Join!

Meeting ID: **810 9405 7685**

Passcode: **625080**

Winter Holidays Observed

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



Q&A

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

Thank you
Have a great day!

Next User Meeting: Jan 4th

Office Hours