OC HMIS User Meeting Webinar Minutes
1/4/23

Contents

Agenda Items

2023 HMIS User Fees

Agencies that receive funding that requires HMIS participation will be charged for the number of licenses the agency has active at the end of the calendar year, based on the fee structure detailed below:

- 1 – 5 users: $750 annually
- 6 – 24 users: $2,750 annually

- - 25 or more users: $3,500 annually
- Agencies that are Coordinated Entry Access Points will be charged an annual fee of $200 in addition to any user fees they may incur. This applies to all Access Points, whether or not they are required to participate in HMIS. The $200 fee will apply to agencies regardless of the number of Coordinated Entry Systems they are participants in.
- Agencies are allowed up to two active Agency Administrators at a time. Agencies will be allowed an additional Agency Administrator for every 700 active enrollments at the end of the calendar year. Agencies that require additional Agency Administrators in addition to those outlined in this policy must pay the set-up and ongoing user fees for those accounts.

For details regarding how your fee was calculated, review the 2023 Agency Fees spreadsheet located in your agency's Dropbox. If payment is required, your agency will receive an invoice via email within the next couple weeks with payment instructions, and will have 60 days from the invoice date to submit payment.

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 and 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- Close projects that are no longer active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

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.

Meeting Material Page Update

The HMIS User Meeting Materials and Data and Performance Management Meeting Materials pages have been updated.

- The months are organized in ascending order
- Meeting Materials are linked to meeting mins, PowerPoint and recorded meeting
- New: Agenda listed for quicker search

CES City Field

There has been an update to the CES Enrollment screen, the field "Which SPA is this household being served in?" has been removed.

A note has been added to the Enrollment screen noting that the client's city prior to entry will be used to determine their SPA for housing opportunities. This city field is a requirement and this field should not be edited after enrollment.

The SPA assignment will determine which match meeting clients will appear in and which opportunities they are likely to be offered. Clients with a city prior data entry answer will be assigned a SPA and housing opportunities will be prioritized based on SPA assignment. If a client does not have a SPA assignment, they may experience long wait time for housing opportunities.

Updating Disability Enrollment vs Status Update

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

Project Start Date

The Project Start Date determines the beginning of a client's period of participation within a project.

Different project types use the Project Start Date field differently, as there are differences in the meaning associated with "starting" residential, service, and permanent housing projects.

For additional information, please refer to the HMIS Data Standards Manual and Project Start Date Knowledge Base article.

Project Exit Date

The Project Exit Date determines the end of a client's period of participation within a project.

Different project types use Project Exit Date differently, to address the difference in meaning associated with "ending" residential and service projects. Each individual client in a household will have their own Project Exit Date. If one member of a household leaves the project before the rest of the household, the leaver's exit date should reflect the actual day that client left the project.

For additional information, please refer to the HMIS Data Standards Manual and Project Exit Date Knowledge Base article.

Updated History Tab and KB Article

Color coding for the history tab in HMIS has been updated to distinguish between Coordinated Entry events and other historical items. Coordinated Entry events such as matches to housing opportunities will now be highlighted in "peach" on the history tab.

Our Knowledge Base article for the History Tab in HMIS has been updated to reflect this change.

- A video explaining the history tab and managing historical items for a client in HMIS has been added to the KB.
- An additional section has been added to the KB to assist with reviewing a client's profile for CES workflow.

Creating Client Records without Client-Identifying Information

Clients who have "Private" profiles may not participate in CES and be referred to the Community Queue because the CES Lead Agencies (the County of Orange or Family Solutions Collaborative) must be able to share this information. In order for a client to participate in CES their record has to be made public.

In order to create a client profile without identifying information, this is done with the "Consent Refused" button.

Please review the Creating Client Records without Client-Identifying Information KB for instructions and a step by step procedure.

Refusing/Revoking Consent to Share Personal Information

A client has the right to refuse or revoke their consent to sharing their information at any time. If a client you are serving is already in HMIS and has revoked their consent, complete the following steps to anonymize the profile:

- Upload a completed copy of the Client Revocation of Consent Form to the client's profile in HMIS under the Client Revocation of Consent Form file category.
- Submit a ticket to the HMIS Help Desk including the client's identifier so that HMIS Staff can properly anonymize the client's record.

OC HMIS staff will then remove the client's name, DoB, SSN from the profile and message Agency Admins currently working with the client.

For more information regarding the revocation of consent form, please refer to our KB article: Refusing/Revoking Consent to Share Personal Information

Dropbox Clean-up

The HMIS team will periodically clean up all DropBox account folders. This is done bi-annually - in June and in January. Please review your Agency's Dropbox folder and download any files you wish to keep.

We will be removing all files on Friday, January 20th so please complete your review by then. Thank you for your cooperation!

Data & Performance Management Meeting Agenda

The Data & Performance Management Meeting will be canceled for the month of January. The Emergency Shelter Project Performance Report will be published mid January. Please be on the lookout for the email once the Emergency Shelter Project Performance Report has been published to review your agency's data. We will resume the Data & Performance Management Meeting in February.

Holiday

The HMIS Help Desk will be closed on Monday, January 16th in observance of Martin Luther King Jr. Day. We will be back in the office to assist you on Tuesday, January 17th.

Q&A

- Q: HMIS Part 2 Recertification - Is there a list of users that need to complete the recertification?
  - A: You can access active users at your agency by running the Agency Active Users report under User Management located under the Data Analysis tab in Clarity and review the Staff Added Date field. You can also send a ticket to the HMIS Helpdesk and the HMIS Team will support by

providing a list of users.

- Q: HMIS Part 2 Recertification - When someone needs a recertification, the agency admin needs to submit for each user to get this? Or will it be sent automatically from HMIS?
  - A: Yes, the Agency Admin needs to submit the HMIS Part 2 Recertification Form for each user at your agency.

- Q: If our agency is in the North SPA but the client spent the night at a friend's place which is a city in the Central SPA. Would that mean they would be enrolled for the Central SPA?
  - A: Yes, the client's city prior will be used to determine SPA for housing opportunities.

- Q: Other CoCs offer this option and I wanted to know if there is an option to have additional fees attached to an agency that would like to include the on-boarding agency training?
  - A: The Agency User Fee is approved by the CoC Board. Regarding the on-board training, that's something the HMIS Team will look into and provide an update at a later time.

- Q: When a user's account is inactive, would they only need to complete HMIS Part 2?
  - A: The user will need to complete both HMIS Part 1 and HMIS Part 2. Once that is completed, they will need to also complete the HMIS Skill Test.

Future Meeting Information

February 2023 HMIS User Meeting Webinar

- Date: Wednesday, Feb , 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.