

## OC HMIS User Meeting Webinar Minutes 2/1/23

### Contents

<b>Agenda Items</b>	<b>1</b>
New HMIS Staff Position	1
2023 HIC and Sheltered PIT	1
HMIS Part 2 Recertification	2
Quarter 4 Data Quality Report Card	2
CoC Dashboard	2
Agency Admin - HappyFox Account	3
Reassigning Head of Household	3
Adding Additional Household Members	3
Bed Reservation Process	3
CES Community Queue Reports	4
Data & Performance Management Meeting Agenda	5
Holiday	5
Q&A	5
Future Meeting Information	6
March 2023 HMIS User Meeting Webinar	6

### Agenda Items

#### ***New HMIS Staff Position***

The HMIS Helpdesk is hiring for an [HMIS Support Specialist](#)

#### ***2023 HIC and Sheltered PIT***

The [2023 HIC and Sheltered PIT](#) process is officially underway!

Friday, February 10th:

- The following items are due for HMIS Participating Projects. Please note the data in HMIS must match

## OC HMIS Monthly User Meeting Minutes

the documents submitted. Client Forms and Answer Forms must be submitted to Dropbox. Submit a ticket to the HMIS Help Desk to notify the team when the forms have been uploaded, and to notify the team that the HIC Forms have been finalized.

- HIC Forms
- PIT Reports for Emergency Shelter and Transitional Housing projects
- The following items are due for projects not participating in HMIS.
  - HIC Forms
  - HIC Client Forms for PSH/OPH/RRH projects that do not participate in HMIS
  - PIT Answer Form for Emergency Shelter and Transitional Housing projects

### ***HMIS Part 2 Recertification***

The [2022 HMIS Part 2 Recertification](#) is extended to Feb 10th.

- 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 Feb 10th will have their accounts locked until the Recertification is completed.

### ***Quarter 4 Data Quality Report Card***

[Q4 Data Quality Report Card](#) will be published shortly! We will email a newsletter with a link to the report card once it is posted. The Report Cards look at the following:

- Data Completeness
- Data Accuracy
- Data Timeliness

The report card will have a new slicer which will allow the Agencies to review their data as a whole. The project level slicer will still be available.

The UDE Data Completeness Dashboard/Details as well as the Timeliness Dashboard/Details reports now include the Agency and Project Name filters.

### ***CoC Dashboard***

The CoC Dashboard for Q4 is now available on our website on this link, [Quarter 4 2022 \(10/1/22 – 12/31/22\)](#)

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.

***Agency Admin - HappyFox Account***

Agency Administrators can create a HappyFox Account to track the tickets that you created.

- The HappyFox account will allow you to see all your tickets after the account is created. It does not let you see historical tickets that were sent into the HMIS Help Desk prior to the HappyFox account creation.
- Only Agency Administrators should create a HappyFox Account.

For information on creating a HappyFox account, please refer to the knowledge base article [Creating a Help Desk Account](#)

***Reassigning Head of Household***

The relationship to Head of Household (HoH) error commonly occurs when the current head of household leaves the project while the rest of the members remain enrolled and there is no re-assignment of the HoH.

When the HoH leaves the project and the rest of the members remained enrolled:

- Designate another member of the household as the new HoH Correct the other members’ relationship to the
- HoH to reflect each individuals’ relationship to the newly designated HoH

Please refer to the Knowledge Base article on [Editing a Client’s Relation Status](#) for more information.

***Adding Additional Household Members***

To enroll an additional client into a project where the household members are already enrolled, you would need to enroll the client from the Programs page of any of the household members that were originally enrolled. You should not enroll the client from his own Programs page, because by doing so the client would be enrolled as an individual which means that the client would be alone in the project enrollment.

Prior to enrolling the new household member into a project, the client must first be added to the Global Household in the Household Members section of the Profile screen.

Please refer to the Knowledge Base article on [Enrolling Additional Household Members](#) for more information.

***Bed Reservation Process***

The Bed Reservation System is available for both Family and Individual CES. Access Points are responsible for adding a client to the Bed Reservation System and keeping them active for clients looking for Emergency Shelters or Transitional Housing. Complete the following process to add clients and keep them active:

Adding Clients

- Step 1: Ensure the Household is enrolled in the Individual CES or Family CES Project.
  - Use the Advanced Search Options to easily locate the enrollment.

## OC HMIS Monthly User Meeting Minutes

- Step 2: Upload the Head of Household's Homelessness Verification into HMIS
  - Step 4: If no verification exists, click "Add File"
  - Step 5: Select the Category
  - Step 6: Select the Predefined name (type of documentation)
  - Step 7: Click Add Record
- Step 3: Provide the Needs Bed Reservation Service to the Head of Household
  - Confirm the Household still needs Bed Reservation Assistance
  - Go to Provide Services
  - Click the down arrow next to Bed Reservation Waitlist
  - Add the date
- Step 4: Complete the Bed Reservation Assessment and send the household to Bed Reservation CQ
  - Go to Assessments
  - Complete the Bed Reservation Assessment
  - Individual - [OC Custom] Individual Bed Reservation Assessment
  - Family - [OC Custom] Family Bed Reservation Assessment
  - Send the household to the Bed Reservation CQ
  - Click on the checkbox next to Bed Reservation, and click Refer Directly to Community Queue.
- Step 5: Add a Current Living Situation - please refer to the [Completing Current Living Situation Assessments](#) KB

### Keeping Clients Active

- Step 1: Confirm the Household still needs Bed Reservation Assistance
  - Be in regular contact with your clients.
- Step 2: Add a new Needs Bed Reservation Assistance service into HMIS for the Head of Household by Wednesday at 9am in order for the household to be considered for any units that become available.
  - Providing this service will allow the household to be considered for units for the next week.
  - Heads of households that have not had any activity in HMIS in the previous 7 days will automatically be removed from the Bed Reservation Community Queue.
- Please refer to the [Adding Households to the Bed Reservation Community Queue](#) KB for additional information.

### ***CES Community Queue Reports***

Four new Coordinated Entry CQ reports are available on the Data Analysis tab:

- FCES Community Queue
- ICES Community Queue
- TAYCES Community Queue
- VCES Community Queue

These reports include the following additional fields:

- Referral Notes,
- Assigned staff and Assigned Agency

## OC HMIS Monthly User Meeting Minutes

- Client file names,
- Disability and CH documentation (Yes/No).

A description of these and other CES reports may be found on the [Coordinated Entry Reports](#) KB.

In addition, please note that all Coordinated Entry report names are being renamed with standard prefixes so reports will be ordered by CES component.

- CES = multiple CES components
- FCES = Family Coordinated Entry System
- ICES = Individual Coordinated Entry System
- TAYCES = TAY Coordinated Entry System
- VCES = Veteran Coordinated Entry System

### ***Data & Performance Management Meeting Agenda***

The Data & Performance Management Meeting will be canceled for the month of February. The Street Outreach Project Performance Report will be published mid-February. Please be on the lookout for the email once the [SO Project Performance Report](#) has been published to review your agency's data.

### ***Holiday***

The HMIS Help Desk will be closed on Monday, February 20th in observance of Presidents Day. We will be back in the office to assist you on Tuesday, February 21st.

### ***Q&A***

- Q: HappyFox - If we were to create a ticket and cc another Agency Admin would that ticket be visible in their HappyFox account?
  - A: Unfortunately, the ticket will only be visible from your HappyFox account queue. The AA that is cc in the ticket will still receive replies in their inbox as so do you. The HappyFox account is another option to review tickets you have submitted.
- Q: Bed Reservation - For the "Needs Bed Reservation Assistance" service, do we or do we not change the dates? Also is it after 7 or 14 days of inactivity that they will be exited from the BRQ?
  - A: Please do not change the Bed Reservation service date, you will just need to add a new service each week. This is because the report is looking at services that occurred within the last 7 days and that the service was entered within the last 7 days. This informs the Matchers that the client has been in contact with the Service Staff and is still in need of services through the Bed Reservation.

## OC HMIS Monthly User Meeting Minutes

- Q: Bed Reservation - I notice the Start Date continues to be updated along with End Date to be the same Date. Can we find out the original start of Bed reservation for our clients?
  - A: Yes, we’ve noticed this as well. This is why we wanted to share the process of adding and updating services for the Bed Reservation. The original start date may be the date of the Bed Reservation assessment was completed or when the client was referred to the Bed Reservation Queue.
  
- Q: Pending Referral Status - We have participants that have moved into housing but their referral status is still showing as pending.
  - A: Please submit a HMIS Helpdesk Ticket and the HMIS Helpdesk Team will support with creating linkage to close out the referral.
  
- Q: HIC PIT - For Rapid Re-Housing (RRH), if the PIT Count is 0 is this because the clients don’t have move-in dates the night of the count? How would we correct this if the data is not accurate?
  - A: Yes that is correct for RRH projects, active beds will only be counted for clients with move-in dates on or before Jan 23rd (PIT). You can run 2023 HIC and Sheltered PIT Data Dashboard to review clients that are counted which have move-in dates. Those who are not counted, but are housed will need their housing move-in entered under their program enrollment screen. After the corrections are made, you can rerun the dashboard to review the updated data.

### ***Future Meeting Information***

#### ***March 2023 HMIS User Meeting Webinar***

- Date: Wednesday, March 1st, 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.