

Welcome!

February 2023
OC HMIS User Meeting

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



Agenda

1. New HMIS Staff Position
2. 2023 HIC and Sheltered PIT
3. HMIS Part 2 Recertifications
4. Quarter 4 Data Quality Report Card
5. CoC Dashboard
6. Agency Admin - HappyFox Account
7. Reassigning Head of Household
8. Adding Additional Household Members
9. Bed Reservation Process
10. CES Community Queue Reports
11. Data & Performance Management Meeting Agenda
12. Holiday
13. Q&A
14. Office Hours

New HMIS Staff Position

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



2023 HIC & 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 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

HIC/Sheltered PIT Reports

- Pathway: Data Analysis > Orange County Clarity System Reports > HIC/PIT > 2023 HIC and Sheltered PIT Data Dashboard
- Includes aggregate and client level data for all projects that should participate in HIC and sheltered PIT
- Active clients tables include aggregate data by household type for each project
- Client details tables include client level data for clients included in the aggregate data

Submission

Explain why any data in the Project Information, Bed Inventory Information, or RRH Max Capacity sections sent by the 211OC team has been altered:

This could include:

Project began operations after the last HIC

Project added/lost units or vouchers

Project changed the population or sub-population it is serving

Funding that the project receives has changed

Location of the project has changed

HMIS data was updated

If this project should be excluded from the 2023 HIC, please write EXCLUDE in the field below.

Additional Comments

To save your progress without submitting to the HMIS team, click on the Save button. To submit your final form to the HMIS team, click on the Submit to the OC HMIS Help Desk button.

Submit to OC HMIS Help Desk

Save

HMIS Part 2 Recertification Extension

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



Q4 2022 Data Quality Report Card

Q4 Data Quality Report Card will be published shortly!

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.

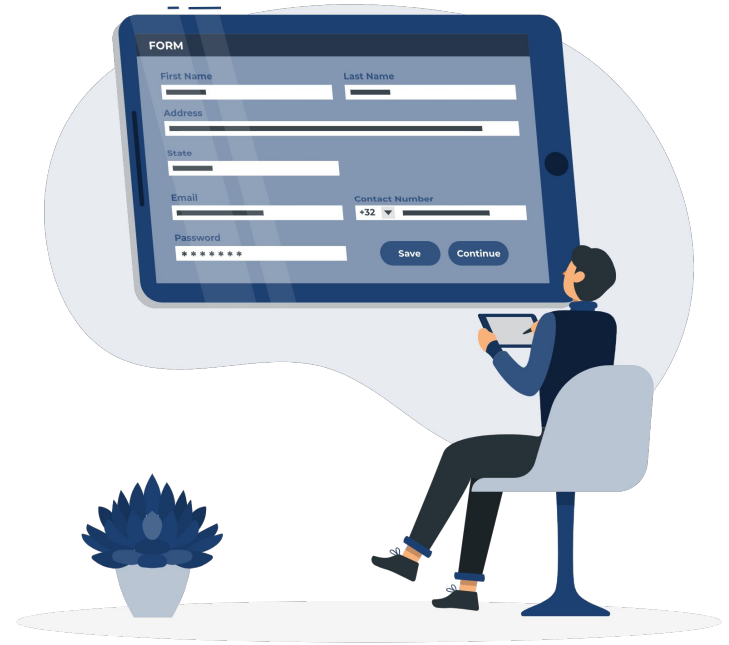


Agency Admin - HappyFox Account

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 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](#)



Agency Admin - HappyFox Account

2-1-1 | OC HMIS Help Desk Submit Ticket Knowledge Base Login

Welcome to our Support Center

Login

Login to know the status of the ticket

Username or Email

Password

Remember me [Forgot password?](#)

Login

Login to track your existing support requests. If you have **not** created a ticket yet then you would need to **register** or create a new ticket to begin.

Submit ticket

Agency Admin - HappyFox Account

2.1.1 | OC HIMS Help Desk

Search Tickets

Submit Ticket Knowledge Base My Tickets

TICKETS

- All Tickets 1
- Pending Tickets 1
- Closed Tickets 0

STATUSES

- New
- User Response Needed
- 211 Staff Response Needed
- Solved
- Closed
- HIC Final Review Stage
- BitFocus Fix Needed
- H-P: 211 Response Needed
- H-P: User Response Needed
- FCES BED RESERVATION
- HUD Ticket Entered
- AUDIT: USER RESPONSE NEEDED
- AUDIT: 211 RESPONSE NEEDED
- HF Testing
- IND CES

CATEGORY

All Tickets

Unresponded by agent Filter 1 - 1 of 1

STATUS	SUBJECT	RAISED BY	CATEGORY	TICKET ID	LAST UPDATED
NEW	Test	Test HMISH...	HMIS - Setup	#H500018886	9 minutes ago

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Agency Admin - HappyFox Account

The screenshot displays the HappyFox Agency Admin interface for a ticket. At the top, the header includes the logo '2.1.1 | OC HMIS Help Desk', a search bar 'Search Tickets', and navigation links 'Submit Ticket', 'Knowledge Base', and 'My Tickets'. A 'Back to Tickets' link is visible on the left. The main content area shows a ticket card for '#H500018886 Test (1) 22 minutes ago'. The ticket is marked as 'NEW' and has a status of 'Test'. It was raised by 'Test HMISHelpDesk' with a 'Medium' priority and 'HMIS - Setup' category. A 'Send Reply' modal is open, showing a rich text editor with a toolbar and a 'Send Reply' button. On the right, the 'Ticket Information' sidebar shows 'Priority Level*' as 'Normal' and 'Contact Type Preferred*' as 'Email response to ticket'.

2.1.1 | OC HMIS Help Desk

Search Tickets

Submit Ticket Knowledge Base My Tickets

< Back to Tickets

Print

#H500018886 **Test (1)** 22 minutes ago

NEW Test

raised by Test HMISHelpDesk priority Medium category HMIS - Setup

Updates

Test HMISHelpDesk 22 minutes ago

Send Reply +Cc Quote Reply -

Send Reply Cancel

Ticket Information Edit All

Priority Level* Normal

Contact Type Preferred* Email response to ticket

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 remained 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 individual's relationship to the newly designated HoH

Homer Simpson

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

SEARCH CASELOAD

▲ The enrollment does not have an active Head of Household. Assign a new Head of Household to maintain compliance.

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

33 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 12/29/2022

Assigned Staff: Armando Salazar

Head of Household: Marge Simpson

Program Group Members

Marge Simpson 12/01/2022 01/23/2023

33 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 12/29/2022

Assigned Staff: Armando Salazar

CHANGE HEAD OF HOUSEHOLD

Marge Simpson Head of household's spouse

Homer Simpson Self (head of household)

SAVE CHANGES CANCEL

01/23/2023

No Statuses

Assessment due every year
Notification: OFF

Adding Additional Household Members

- If you want 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 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.**
- 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.

Adding Additional Household Members

System

SEARCH FOR A CLIENT ADD CLIENT (+)

super 1 SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
Super Man		5679	04/18/18
Super Man	01/23/01	0000	01/22/19
2 <input checked="" type="checkbox"/> Super Woman	03/31/80	4321	04/25/18

Edit

Step 1: Search for the client's name and click on the Edit icon.

Adding Additional Household Members


Super Woman

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES LOCATION

▲ Release Of Information is Missing. Please add one to ensure compliance (Click here)

CLIENT PROFILE

Social Security Number	XXX - XX - 4321	
Quality of SSN	Full SSN Reported	▼
Last Name	Woman	
First Name	Super	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	03/31/1980	Adult. Age: 38
Middle Name	None	▼
Gender	Female	▼



UNIQUE IDENTIFIER
638314BBD

Household Members Manage

Super Man	Husband
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Active Programs

- RHY Funded Emergency Shelter...
- CoC Funded Street Outreach &...
- ESG Funded Homeless Prevention...

Recent Services

Step 2: Open Super Woman's record and verify that Super Man is already part of the Household.

Adding Additional Household Members

Super Woman

PROFILE HISTORY **PROGRAMS** ASSESSMENTS FILES SERVICES LOCATION

⚠ Release Of Information is Missing. Please add one to ensure compliance (Click here)

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
RHY Funded Emergency Shelter Training Project OC Training Agency	03/30/2018	Active	Individual
CoC Funded Street Outreach & Supportive Services Training Project OC Training Agency	03/14/2018	Active	Individual
ESG Funded Homeless Prevention Training Project OC Training Agency	03/14/2018	Active	Individual

Household Members Manage

Super Man Husband

Active Programs

RHY Funded Emergency Shelter...

CoC Funded Street Outreach &...

ESG Funded Homeless Prevention...

Step 3: Go to the Program tab of Super Woman's record and select the Edit button next to the project you would like to enroll Super Man into.

Adding Additional Household Members

The screenshot displays the 'Super Woman' program management interface. At the top, there is a navigation menu with options: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, FILES, SERVICES, CONTACT, and LOCATION. Below this is a yellow warning banner that reads: 'Release Of Information is Missing. Please add one to ensure compliance (Click here)'. The main content area is titled 'PROGRAM: ESG FUNDED HOMELESS PREVENTION TRAINING PROJECT'. A horizontal menu below the title includes 'Enrollm', 'History' (highlighted with a yellow box and the number '1'), 'Assessments', 'Notes', 'Files', and 'Forms', followed by an 'X Exit' button. The 'Program Service History' section below this menu shows 'There are no results to display'. On the right side, there is a green box indicating '530 DAYS ACTIVE PROGRAM'. Below this, there are several fields: 'Program Type: Group (2)', 'Program Start Date: 03/14/2018', 'Assigned Staff:', and 'Head of Household: Super Woman' with a checkmark. At the bottom right, there is a section titled 'Program Group Members' with a plus sign and a yellow box containing the number '2'.

Step 4: Go to the History tab and select the Add Button next to Program Group Members at the right of the screen.

Adding Additional Household Members



Step 5: A popup box will appear providing the option to add any household member who is not already enrolled in the project. Toggle the switch next to the name of the client you want to enroll, and then click Enroll.

Adding Additional Household Members

Super Man

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

Enroll Program for client **Super Man**

Project Start Date 08/26/2019

Relationship to Head of Household

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Select

Physical Disability Select

Developmental Disability Select

Chronic Health Condition Select

HIV - AIDS Select

Mental Health Problem Select

Substance Abuse Problem Select

HEALTH INSURANCE

Covered by Health Insurance Select

SAVE & CLOSE CANCEL

Step 6: This will open Super Man's Program Enrollment page, where we can answer the project entry questions to enroll the client. After you have answered the program entry questions, click Save and Close.

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



Bed Reservation Process

Adding Clients

1. Ensure the Household is enrolled in the Individual CES or Family CES Project.
 - a. Use the Advanced Search Options to easily locate the enrollment.
2. Upload the Head of Household's Homelessness Verification into HMIS
 - a. If no verification exists, click "Add File"
 - b. Select the Category
 - c. Select the Predefined name (type of documentation)
 - d. Click Add Record

1

HISTORY

Advanced search options **Hide ^**

Search: _____ Category: Any category ▾ Agency: County of Orange ▾

Start Date: / / End Date: / / Type: Programs ▾

Coordinated Entry Clear **SEARCH**

Service Name	Start Date	End Date
Individual Coordinated Entry System County of Orange	07/20/2022	Active

Program Service Referral Reservation Assessment Events

2

PROFILE HISTORY PROGRAMS NOTES **FILES** SERVICES CONTACT

Release Of Information is Missing. Please add one to ensure compliance. (Click here)

CLIENT FILES **ADD FILE**

	Coordinated Entry Documentation: Homelessness Verification: Self Certification by Erin DeRycke on 11 Oct, 2019, 122.53 KIB System
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[MODIFY FILE](#) [DELETE FILE](#)

UPLOAD A FILE

Category: **Coordinated Entry Documentation** ▾

Predefined Name: CES Authorization Form ▾

File: **Select File**

Private:

ADD RECORD **CANCEL**

Trouble attaching files? Switch to the Basic Uploader

Bed Reservation Process

Adding Clients

3. Provide the *Needs Bed Reservation Service* to the Head of Household
 - a. Confirm the Household still needs Bed Reservation Assistance
 - b. Go to Provide Services
 - c. Click the down arrow next to *Bed Reservation Waitlist*
 - d. Add the date

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

3 Enrollment History **Provide Services** Events Assessments Notes Files Forms × Exit

Services

Bed Reservation Wait List Case Management ▾

Needs Bed Reservation Assistance

Start Date: 01/31/2023 📅 End Date: 01/31/2023 📅

SUBMIT

Housing Notes Case Management ▾

A new Bed Reservation Service needs to be added every week the client wants to be considered for a unit.

Bed Reservation Process Adding Clients

4. Complete the Bed Reservation Assessment and send the household to Bed Reservation CQ
 - a. Go to Assessments
 - b. Complete the Bed Reservation Assessment
 - i. Individual - [OC Custom] Individual Bed Reservation Assessment
 - ii. Family - [OC Custom] Family Bed Reservation Assessment
 - c. Send the household to the Bed Reservation CQ
 - i. Click on the checkbox next to Bed Reservation, and click Refer Directly to Community Queue.
5. Add a Current Living Situation - please refer to the [Completing Current Living Situation Assessments](#) KB

4

5

Bed Reservation Process

Keeping Clients Active

1. Confirm the Household still needs Bed Reservation Assistance.
 - a. Be in regular contact with your clients.
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.
 - a. Providing this service will allow the household to be considered for units for the next week.
 - b. 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.



CES Community Queue Reports

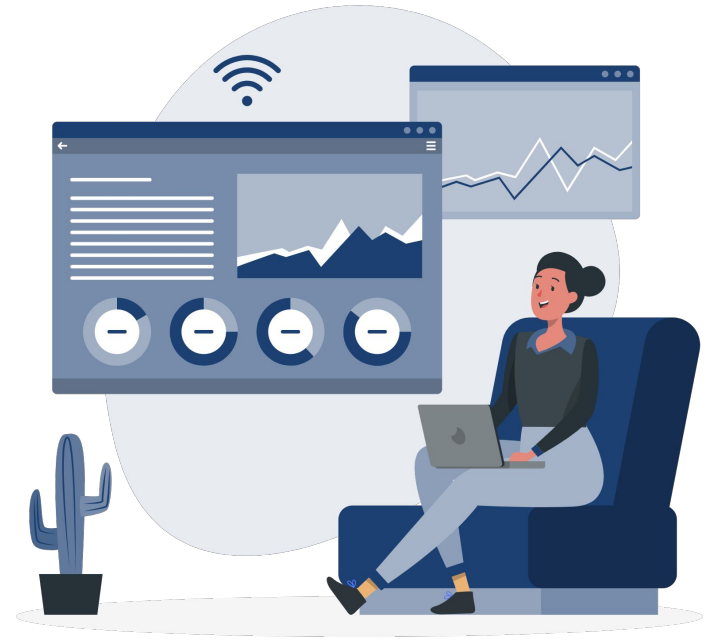
Four new Coordinated Entry CQ reports are available on the Data Analysis tab:

- 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
- 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.



CES Community Queue Reports

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

FCES Successful Housing Placements

FCES VI-SPDAT Data by Access Point

ICES Assessment Data by Access Point

ICES Chronic Homelessness Status (client model)

ICES Community Queue

ICES Status Dashboard

ICES VI-SPDAT Data by Access Point

TAYCES Community Queue

VCES Assessment Data by Access Point

VCES Community Queue

Data & Performance Management Committee Meeting

Agenda:

The February 2023 Data & Performance Management Committee Meeting will be cancelled.

The Street Outreach Project Performance Report will be published next week!

Holiday Observed

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

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

Thank you
Have a great day!

Next User Meeting: Mar 1st

Office Hours