Welcome!

February 2023
OC HMIS User Meeting

Please enter your agency name in the chat box

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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

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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

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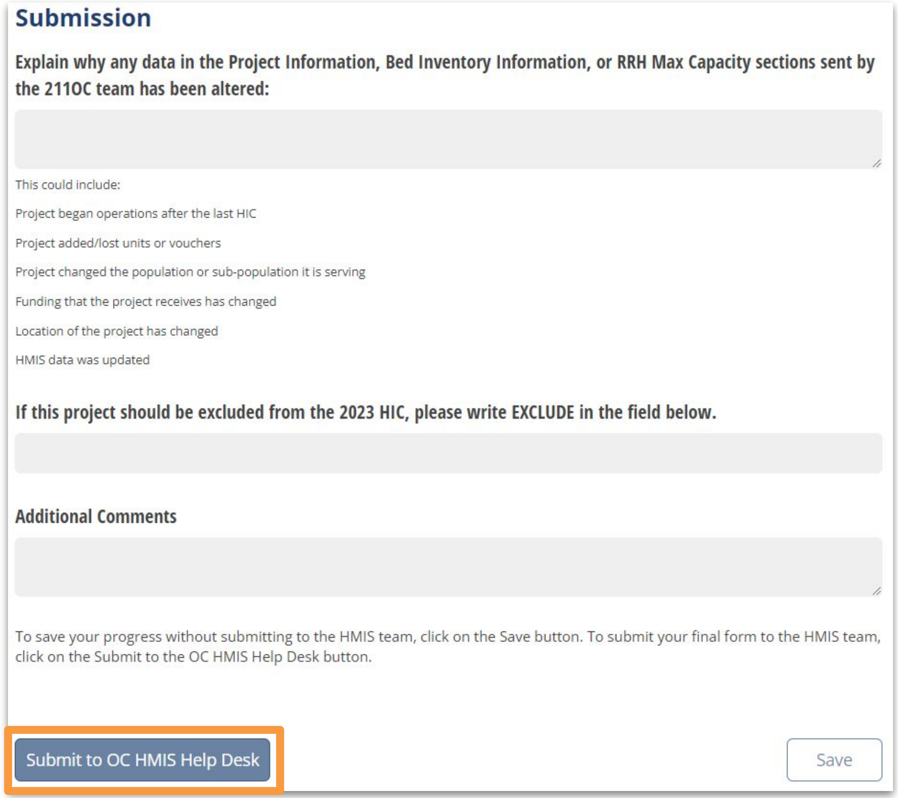
HIC/Sheltered PIT Reports

- 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

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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.

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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.

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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.

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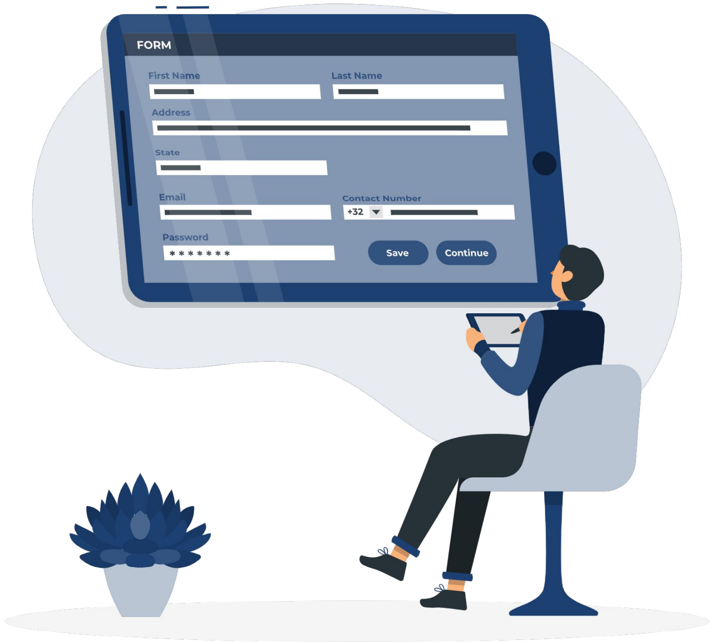
Agency Admin - HappyFox Account

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 historial 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



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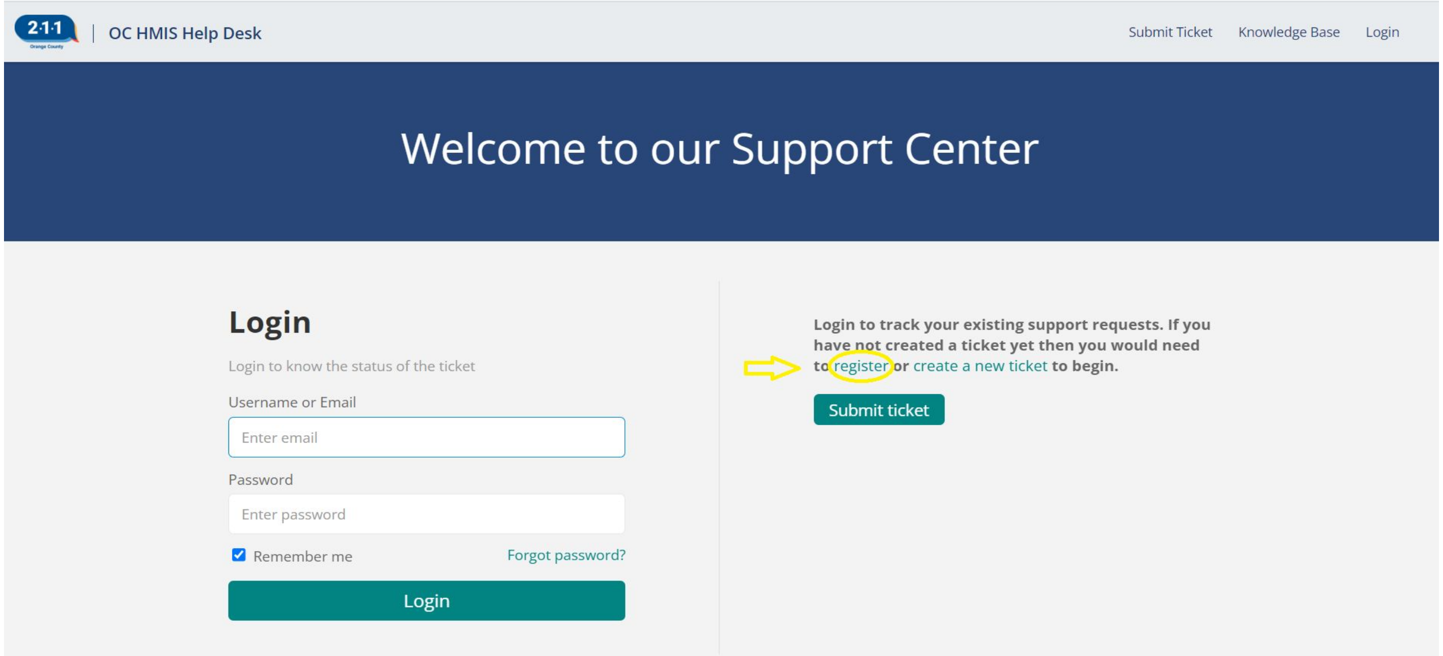
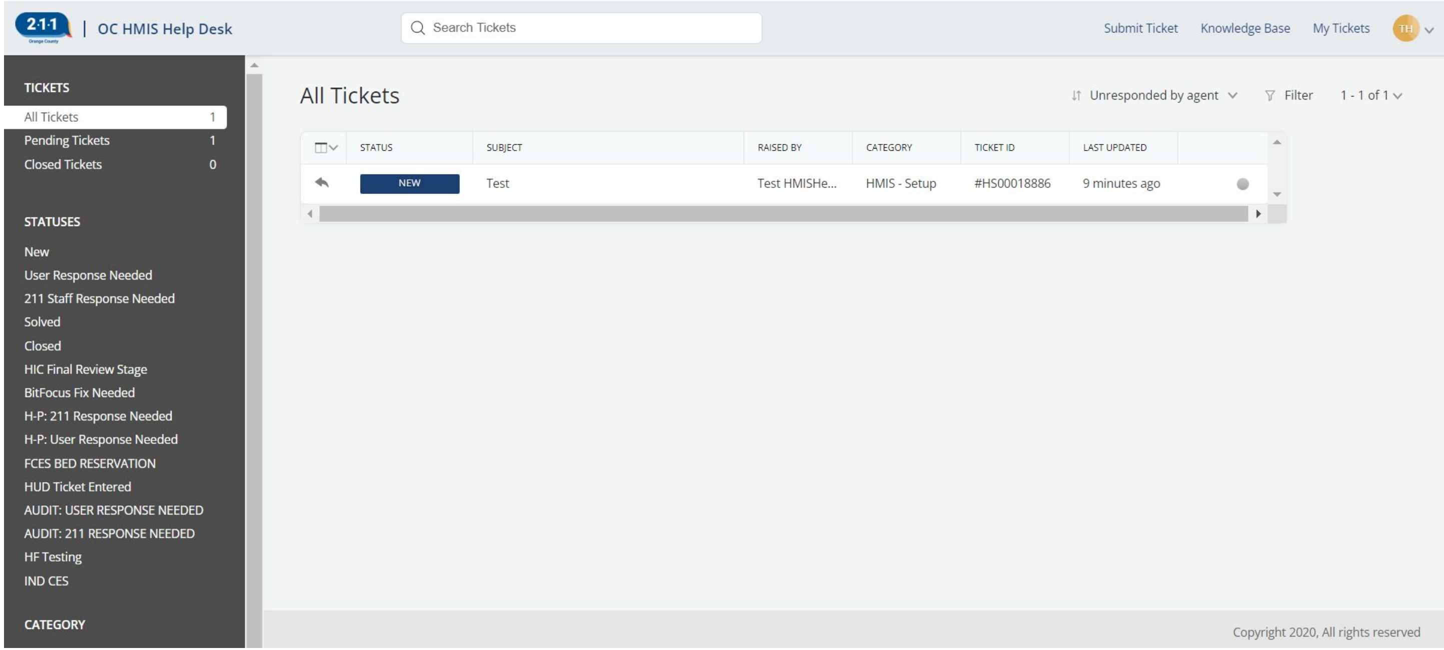
Agency Admin - HappyFox Account



Agency Admin - HappyFox Account



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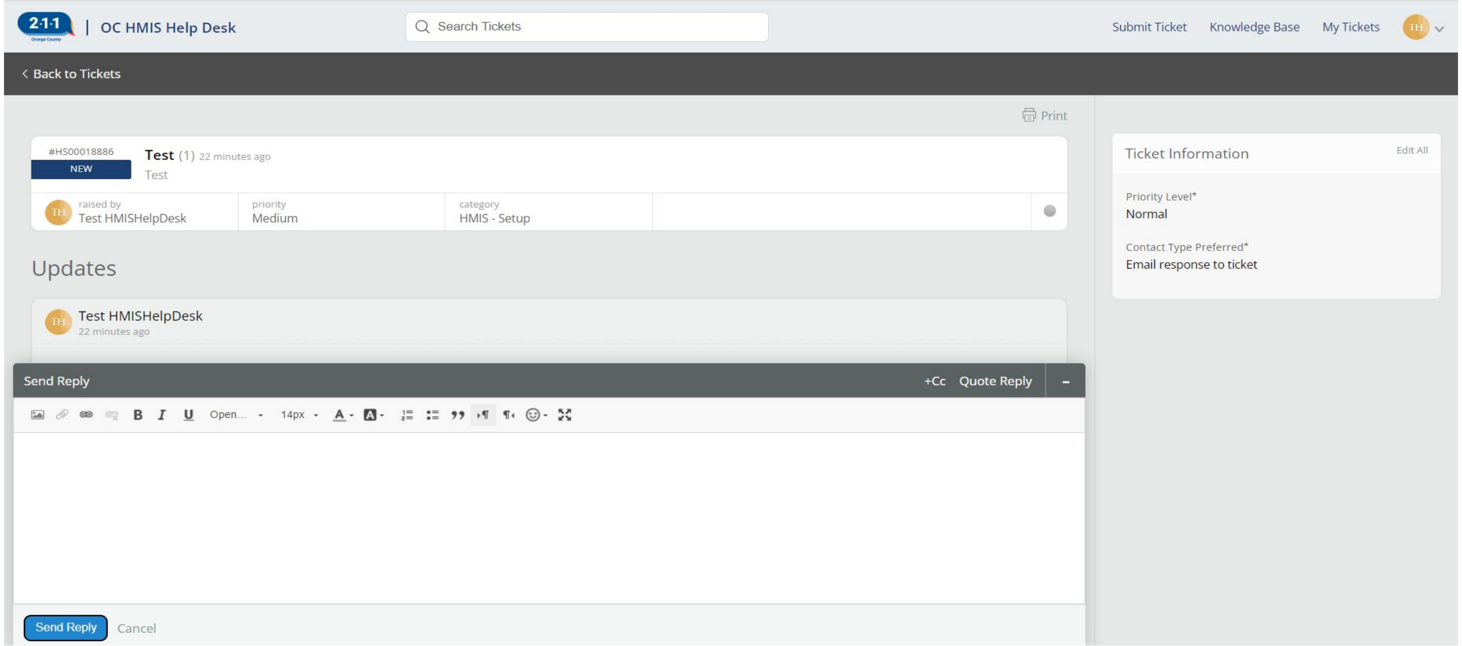
Agency Admin - HappyFox Account

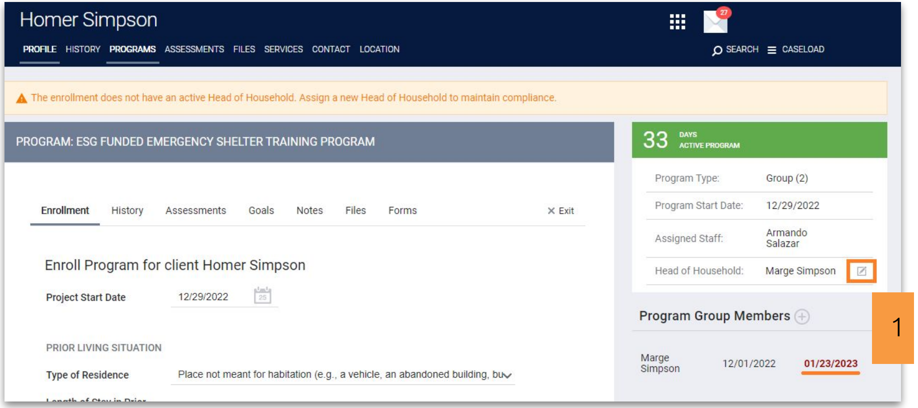


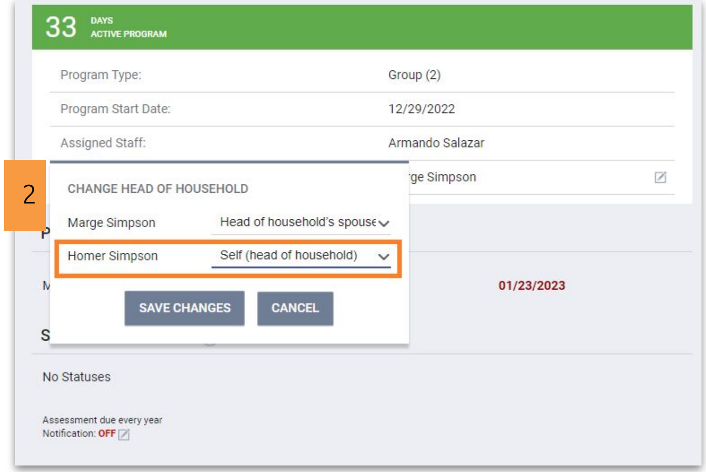
Reassigning Head of Household

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 remained enrolled and there is no re-assignation 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





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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.

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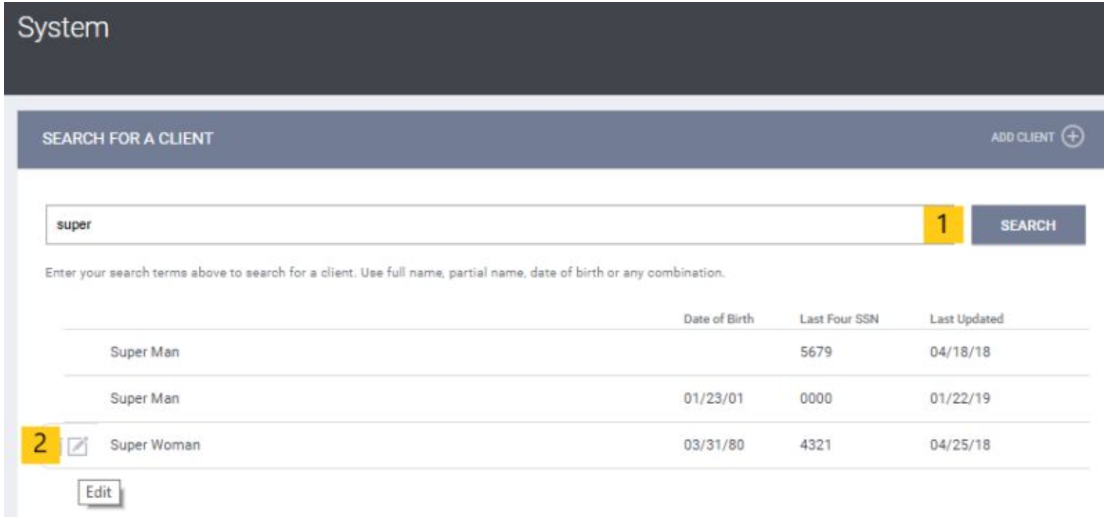
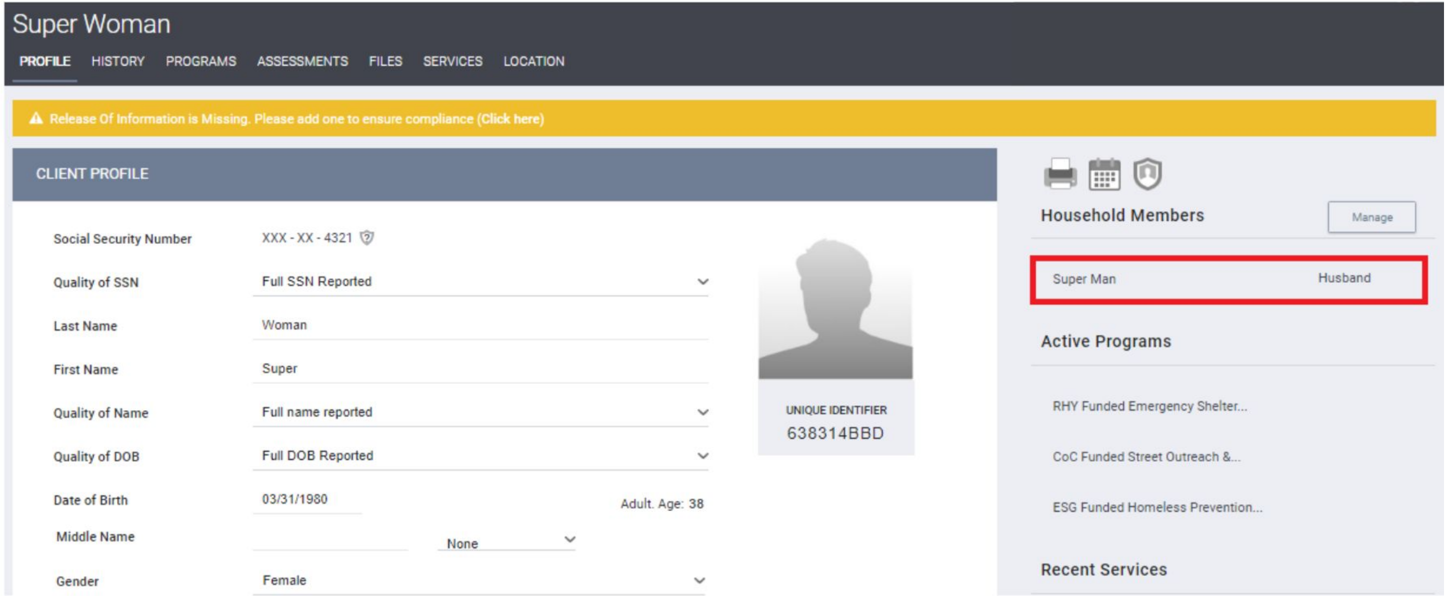
Adding Additional Household Members



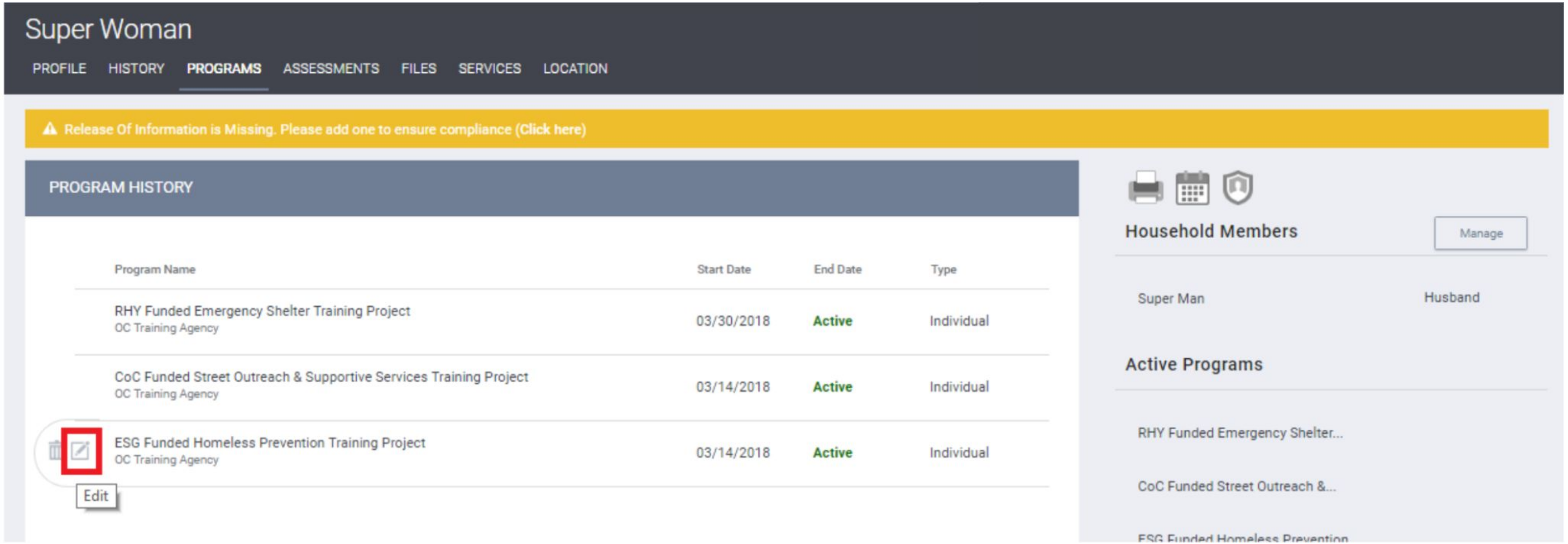
Step 1: Search for the client's name and click on the Edit icon.

Adding Additional Household Members



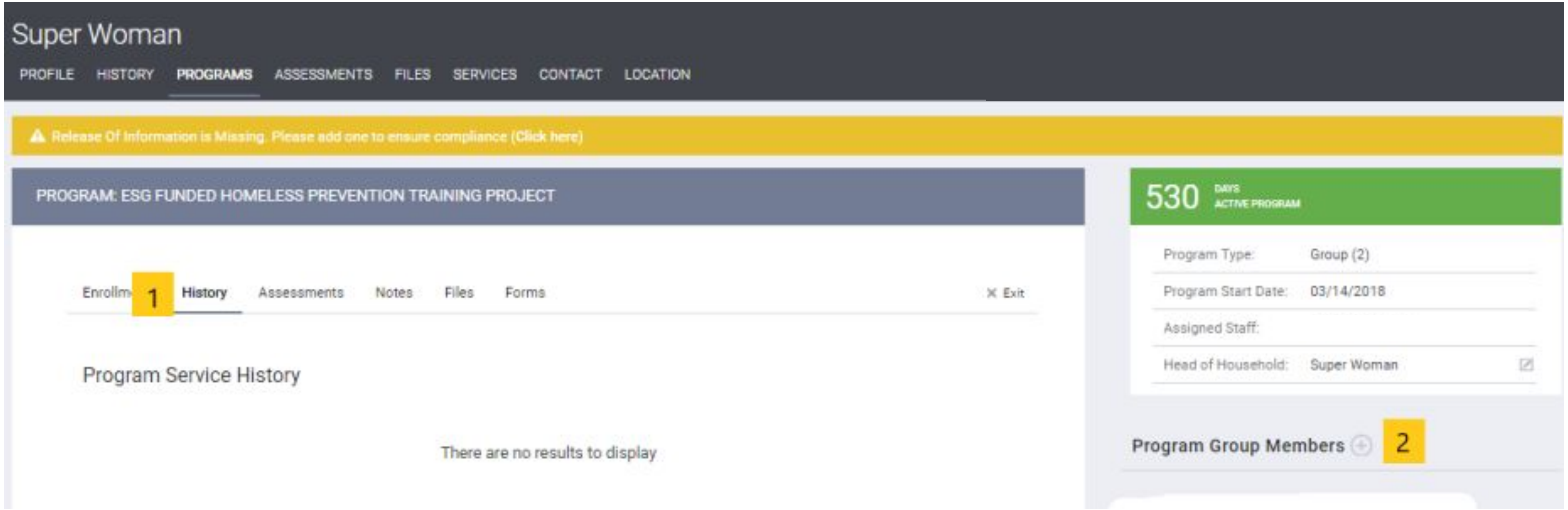
Step 2: Open Super Woman's record and verify that Super Man is already part of the Household.

Adding Additional Household Members



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

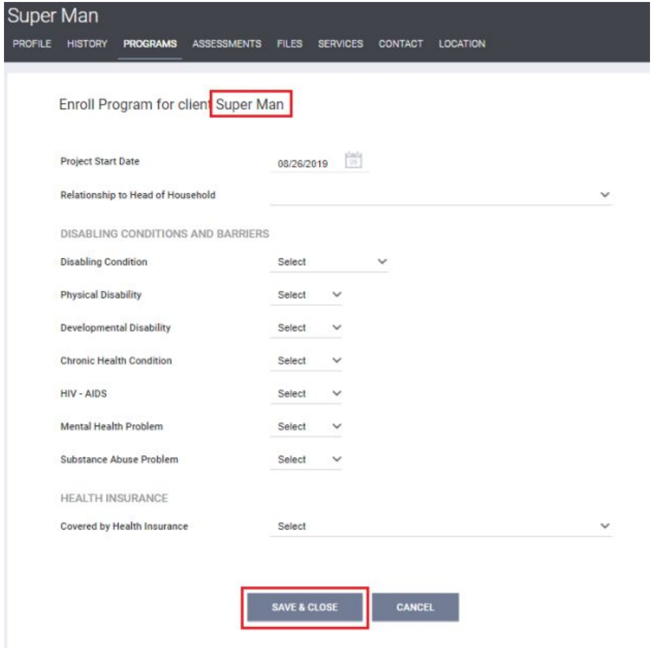


Step 4: Go to the History tab and select the Add Button next to Program Group Members at the right of the screen.

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



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

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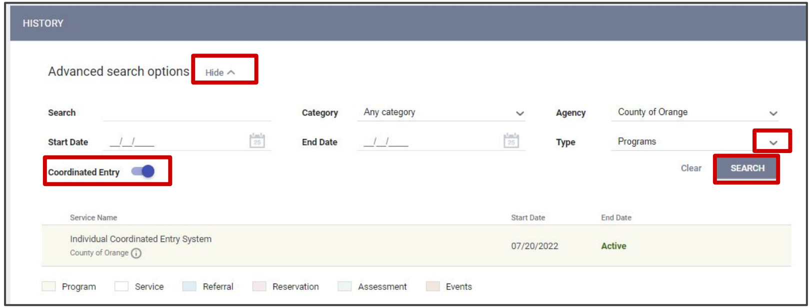
Bed Reservation Process
Adding Clients

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



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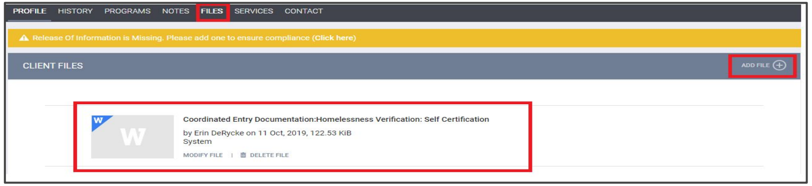

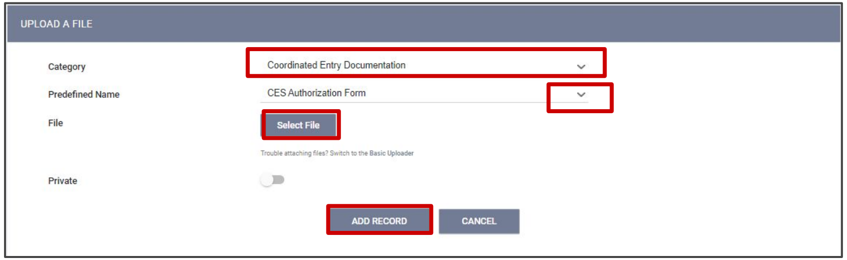

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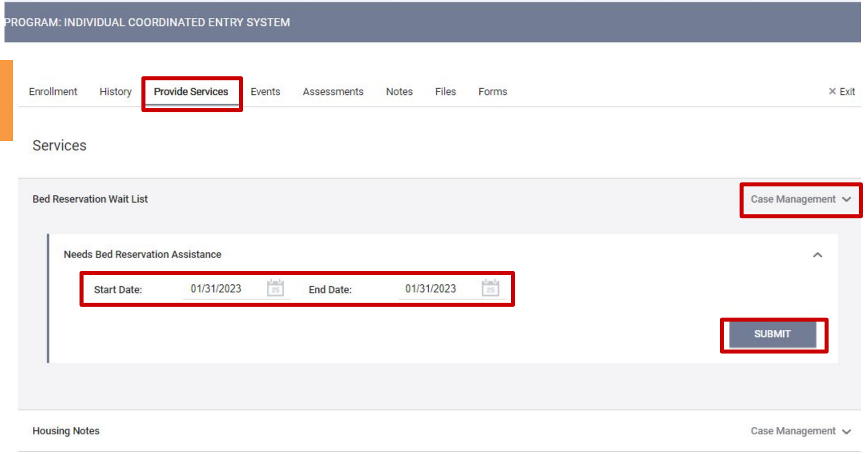
Bed Reservation Process
Adding Clients

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

3

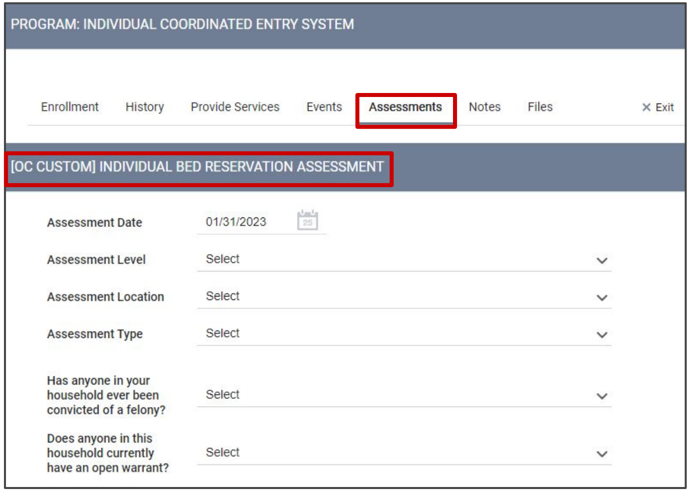


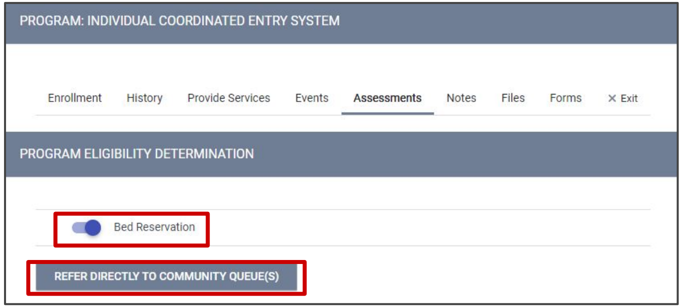
A new Bed Reservation Service needs to be added every week the client wants to be considered for a unit.

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





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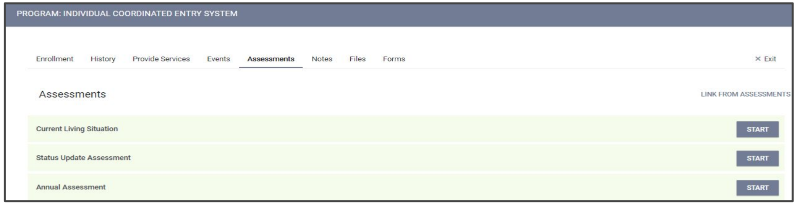

Bed Reservation Process
Keeping Clients Active

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.

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CES Community Queue Reports

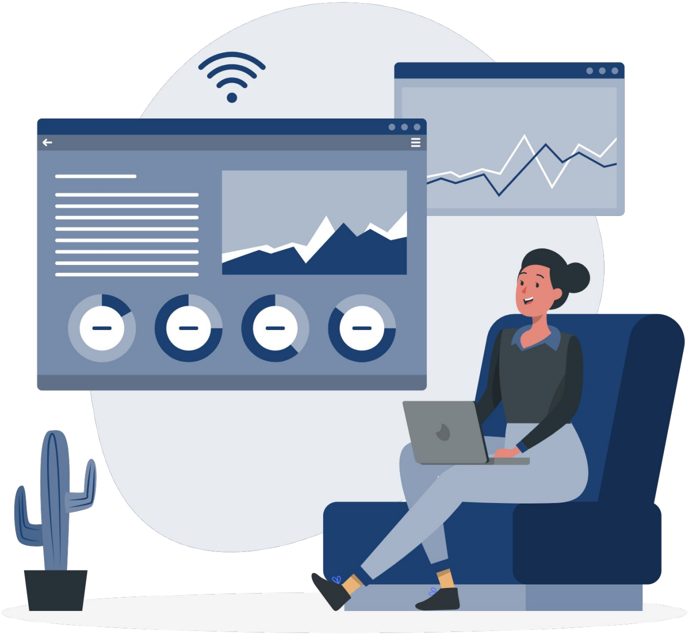
Four new Coordinated Entry CQ reports are available on the Data Analysis tab:

- 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.



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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

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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!

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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.

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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

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Office Hours

Orange County