OC HMIS User Meeting Webinar Minutes
4/5/23

Contents

Agenda Items

Data Quality Plan

The [OC HMIS Data Quality Plan](#) and [Data Quality Tools Guide](#) are now available! The Data Quality plan outlines the different components of data quality, the schedule for publishing Data Quality Report Cards, incentives for projects meeting the data quality thresholds, and enforcements for projects with low data quality. The Data Quality Tools Guide consolidates the different tools to support the agencies with their data quality by each data quality component.

Client Record Request Updated Agency List on HMIS Consent Form

Clients in OC HMIS have the right to review a copy of their data as entered in HMIS. They may submit the request to any agency participating in OC HMIS that they have been served by in the past.

Clients may inspect and obtain a copy of their data as entered in HMIS: client's profile screen, release of information, enrollment history and list of uploaded documents. Requests for data that is not included in the Client Record Dashboard, will need to be reviewed and approved.

An Agency Administrator at the agency is required to review the dashboard with the client upon request.

Knowledge Base: Client Record Requests

HMIS Helpdesk Ticket

A friendly reminder only Agency Admins should send in HMIS Support Tickets. Please review the Knowledge Base Library first and if you're unable to locate a solution, reach out to your Agency HMIS Admin to escalated the issue to the HMIS Helpdesk.

HMIS Staff Onboarding

When adding new staff to your agency there are a few tasks that need to be completed.

- Training Courses - New staff need to take training courses based on their access role.
  - HMIS Part 1 - Covers history of HMIS, privacy and security, basic HUD definitions, and HMIS best practices.
  - HMIS Part 2 - Covers HMIS functionality.
  - HMIS Skills Test - Test knowledge from the training courses.
- When the new staff have completed the training courses and the HMIS Skills Test. You will need to submit an HMIS Account Update & Testing form with the new staff's information such as their name and work email address. You will also include the fictitious household that was created on the Training site along with the programs the household was enrolled in.
- For any account, it is a good practice to ask the user for the certification that they completed the training courses necessary for an account activation.

For information on New Staff Onboarding, please refer to the knowledge base article New Staff Onboarding.

Release of Information - Unaccompanied Minors

Unaccompanied minors (a single client age 17 or under, or a household where all clients are 17 or under) CANNOT consent to share their personal information in HMIS.

- In these situations, Permission should be set to No, and Client Privacy must be set to "Private."

Data can only be shared if written consent is obtained from the parent or legal guardian of a youth who is under age 18 or with written consent from a youth who is 18 and older.

Knowledge Base Article: [Accessing and Completing Release of Information (ROI) Page](#)

Updated to Intake Forms

The following English and Spanish Intake Forms have been updated to include the military service Theater of Operations: CoC/ESG, PATH, HOPWA and No Federal Funding.

Deleting Services and Program Enrollments

Services and program can be deleted if they were entered incorrectly by following these steps:

- Search for the name of the client and click on the Edit icon next to the profile record you wish to edit
- Go to the History tab, and hover to the left of the service/enrollment you wish to delete until the Trash icon appears and then select it
- Confirm the deletion by clicking "OK"

Only Agency Administrators can delete program enrollments. Program Enrollments cannot be deleted if there are services linked to the enrollment. For more information on deleting enrollments, including a video walkthrough. please refer to our [Deleting Program Enrollments KB Article](#).

Service Delivery Types

Service Delivery Types are an important component of setting up Projects and *Services* for your agency. *Service Delivery* is the method by which *Service Items* are provided.

There are four *Service Delivery* delivery types:

- Long Term - Not provided to clients every day (generally)
- Single Event - Associated with a single date or on an "as needed basis"
- Daily Attendance - Provided on a daily basis
- Multiple Attendance - Provided multiple times per day

Additional guidance can be found on the [New Agency/Program Set-Up](#) Cognito form, and the [Adding Services](#) and [Attendance Based Services](#) KBs.

CES Report Training

The HMIS Helpdesk Team will be hosting a CES Reports Training session on Thursday, April 27th at 2pm. A reminder newsletter with more details will be sent out the week of the training.

Data & Performance Management Meeting Agenda

The April 2023 Data & Performance Management Committee Meeting was canceled.

The Permanent Supportive Housing & Other Permanent Housing Project Performance Report has been published and is available on this link, [PSH/OPH Project Performance Report](link)

Q&A

- Q: On the dashboards - are they dynamic - can I select the area showing data issues to learn the clients who make up that percentage of data not complete - so we can correct?
    - A: For the Data Completeness dashboards, there is an aggregate dashboard which matches the format in the slide and there is a Details version of the report which lists the clients and their IDs.

- Q: Can you explain bed utilization again? Is the total number of occupied beds divided by the total number of available beds?
    - A: Bed Utilization is the percentage of beds and units that are occupied. The number of nights that clients were filling the beds in your project divided by the total possible nights the beds can be filled. We find the number of bed nights each client has during a reporting period, add all those up and the denominator is the bed inventory that was available every day during the reporting period. So if you are looking at a month and you have 10 beds available for 30 days would be 300 possible bed nights, that is how bed utilization is determined.

- Q: If a client does not have a social security number, what would be the best answer to choose without our data reporting being impacted?
    - A: The option you should be choosing according to the Data Standards is Client Doesn't Know, that is what the guidance is in the Data Standards. It will show up as not a valid response. But HUD is aware that all the clients you are serving may not have a Social Security Number or may not want to share it with you. HUD accepts that it may not be 100% data complete for that one. HUD is considering only collecting the last 4 of the Social Security Number. They have not decided that yet.

- Q: Any chance you will be taking out the social sec quality section for the incentives?
    - A: For now we are not removing the Social Security field because we are staying in compliance with the HUD Standards and that field is a requirement. If HUD changes their requirement to only collect the last 4 of the Social Security Number then we will remove that also.

- Q: Should we send a screenshot of the training with the skills test submission?
    - A: It is not required to send in a screenshot but it is good practice to ensure that the user has completed the appropriate training so that there is no delay in creating their account. And that the user has taken the correct training course for their access role.

- Q: Will the CES Training be a live or Zoom meeting?
    - A: It will be a live Zoom meeting. We will provide more information in our newsletter and the link will be included.

- Q: Regarding some of the data quality timeline, what is the desired level of timeliness? Does this apply to notes, case management, and services entered?
    - A: For timeliness, the threshold for Orange County is within 3 days of when the activity occurred. What we are looking at for data timeliness is enrollments, the number of days between when the client entered your project and when you put it in HMIS as well as services and exits.

Future Meeting Information

May 2023 HMIS User Meeting Webinar

- Date: Wednesday, May 3rd, 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.