OC HMIS User Meeting Webinar Minutes
7/5/23

Contents

Agenda Items

Family CES Migration

Bitfocus is supporting the final phase of migrating the Family Coordinated Entry System to the County of Orange.

The migration process is expected to go live the week of July 10th.
- Family Access Points (APs) will now navigate to the County of Orange to enroll clients into Family CES. Family APs will also need to add services, notes, assessments and check-ins under the County of Orange's Family CES.
  - If your agency is not currently a Family AP, HMIS Agency Admins can submit a ticket to HMIS Helpdesk for additional information.

- [Shelter Providers/Housing Providers](#) should review all available opportunities at your agency, and ensure the opportunity is selected for "Opportunity is for Family Bed Reservation" or "Opportunity is for Family CES" to ensure households with at least one adult and one child are matched accordingly. Review and ensure all the opportunities listed for your agency are accurate and up to date, including removing opportunities that are no longer available.
- Family Solutions Collaborative will be matching clients in HMIS through the County of Orange's Community Queue. With this in mind, please complete as much of this clean-up as possible to ensure clients can be successfully matched to housing opportunities.
- [Coordinated Entry (CES) & Bed Reservation Knowledge Base Articles](#)

HMIS User Inactivity

HMIS User that don't log into HMIS for 60 days, the HMIS account will be locked automatically. The user will receive a notification two (2) calendar days prior to the account being locked.

Agency Admin will need to submit a ticket to the HMIS Helpdesk to reset the user's training.

The user will be required to complete the trainings:

- [HMIS Part 1](#)
- [HMIS Part 2](#)
- [HMIS Skill Test](#)

HMIS Training

The following tasks needs to be completed by a new HMIS user at your agency.

- Training Courses - [New staff](#) need to take training courses based on their access role.
  - Agencies with federal funding will need to take the appropriate Data Standard training
  - Agencies participating in Coordinated Entry (CES) or Bed Reservation will need to complete the CES training
- Complete the [HMIS Skill Test](#)

For any account, it is a good practice for the Agency Admin to ask the user for the certification that they completed the training courses necessary for an account activation.

HMIS Account Update & Testing Form

We wanted to remind Agency Administrators that when a user leaves your agency, an [HMIS Account Update & Testing Form](#) should be submitted to deactivate the user's account in HMIS.

When an Agency Administrator leaves, please submit a form one week before their scheduled end date so the Agency Administer role can be transferred to a new user.

This is an important security measure because users should not have access to HMIS after they leave the agency.

Agency Audit

In July, we will begin conducting agency audits for 2023

- We will reach out to your agency 2 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.
- Please be on the lookout for our email to schedule your Agency Audit. We will be attaching the audit form for your agency but it is available for you to review on this link, 2023 Agency Audit Form
- There will be a number of attached forms on the audit form. These forms will give you an overview of your agency such as Active Users, Program Descriptor Data, Funding Sources, etc.
- The Participating Agency Agreement and Inter-Agency Data Sharing Agreement forms must be dated in 2023 and signed (wet signature) by leadership at the agency.
- Please review the reports and complete the audit form questionnaire 2 business days before your scheduled audit meeting.

Project Set Up Form

The Project Setup Form has been updated with new options to accommodate AB 977 standards for state-funded projects. Updates to the Grant Information Section include:

- Links on guidance for supplying the appropriate grant identifier
- New options to allow for selection of the appropriate "Other Funding Source"

Please reach out to the Helpdesk if you have any questions about your state-funded projects. These resources will also assist with the project setup: California AB 977 Support Materials, HCD and BCSH (Cal ICH grantees).

Data Quality Reports

Agencies may run reports at any time to review their data quality in HMIS. Two such reports are:

- UDE Data Completeness Dashboard: This report is a graphical representation of the location of Universal Data Element errors in your projects. Use this report to quickly see DQ errors by project.
- Data Timeliness Report: This report displays the number of clients entered within a certain number of days. Use these reports to review projects where timeliness may be a factor and adjust procedures to correct future issues.

Filters may be used to narrow the scope of the data to your agency and each tile is color coded to help identify errors. Additionally, interactive functionality allows you to see each client record containing issues and enables immediate correction.

You may find these and other Data Quality Reports here: Launchpad>Reports>Data Analysis>Orange County System Reports>Data Quality Section.

Potential Duplicates Client Records

In effort to merge duplicate client records, the HMIS Team will send a spreadsheet to agencies for review.
- Identify if the client profiles are of the same client, if so please indicate they are duplicate records and which is the primary profile.
- Spreadsheets are due July 28th Upload into DropBox and notify the HMIS Team by submitting a Helpdesk ticket.

Before creating a new client profile search to see if a client record already exists. Run the Duplicate Clients Report to identify potential duplicate client records Submit a ticket to the HMIS Helpdesk to merge the duplicate records.

DropBox Clean Up

Bi-Annual DropBox Clean Up Schedule:
- January
- July

Please review your Agency's DropBox folder and download any files you will need for your records. Agency Administrators will have until EOD on July 21st to download any files that are stored in agencies' DropBox folders before they are permanently deleted.

Training Opportunities

Please make sure to check the HMIS Helpdesk site for upcoming training opportunities.
- HUD: HMIS Data Analytics On-Demand Course
- Office of Care Coordination: HUD's Equal Access Rule

Sending Client Information to the HMIS Helpdesk

Client Identifying Information, also known as Personal Protected Information (PPI), is a category of sensitive information that is associated with an individual person. This information should be accessed only on a strict need-to-know basis, handled and stored with care.

This category includes but is not limited to:
- First Name & Last Name

- Date of Birth (DOB)
- Social Security Number (SSN)

Client Identifying Information should never be sent to the HMIS Help Desk through text of the ticket or an attached screenshot or other document. If you need to discuss a specific client only the client's HMIS Client Unique Identifier should be sent.

Project Performance Report

The Emergency Shelter Project Performance Report is published.

The upcoming report is Street Outreach, please review Project Performance Report Overview for applicable goals.

- Review the draft Goal 10 data available on DropBox and also run the Project Performance Reports in Clarity to review the additional goals. Perform data cleanup in Clarity directly.
  - Reports>Data Analysis>Orange County Clarity System Reports>Project Performance Reports section

Q&A

- Q: Do you have a knowledge base article about the 60 day account inactivity?
  - A: Yes the knowledge base article that has information about accounts being set to inactive after 60 days is the Troubleshooting Logging into HMIS

- Q: I got an error while entering the disability condition.
  - A: For information on how to work with the disabling condition field, please refer to our knowledge base article Disabling Condition Field

Future Meeting Information

August 2023 HMIS User Meeting Webinar

- Date: Wednesday, August 2nd, 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.