

# Welcome!

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July 2023  
OC HMIS User Meeting

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



# Agenda

1. Family CES Migration
2. HMIS User Inactivity
3. HMIS Training
4. HMIS Account Update & Testing Form
5. Agency Audit
6. Project Set Up Form
7. Data Quality Reports
8. Potential Duplicate Client Records
9. DropBox Clean Up
10. Training Opportunities
11. Sending Client Information to HMIS Helpdesk
12. Project Performance Report
13. Q&A
14. Office Hours

# Family CES Migration

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- Bitfocus is supporting with the final phase of migrating the Family Coordinated Entry System to the County of Orange
- Expected Go Live the week of July 10th



# HMIS User Inactivity

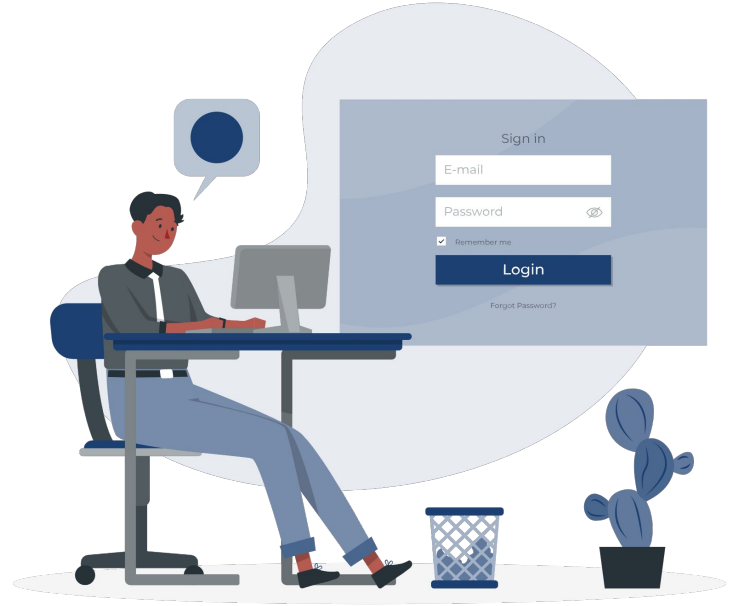
If an HMIS User does not log into HMIS for 60 days, the HMIS account will be locked automatically.

- 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:

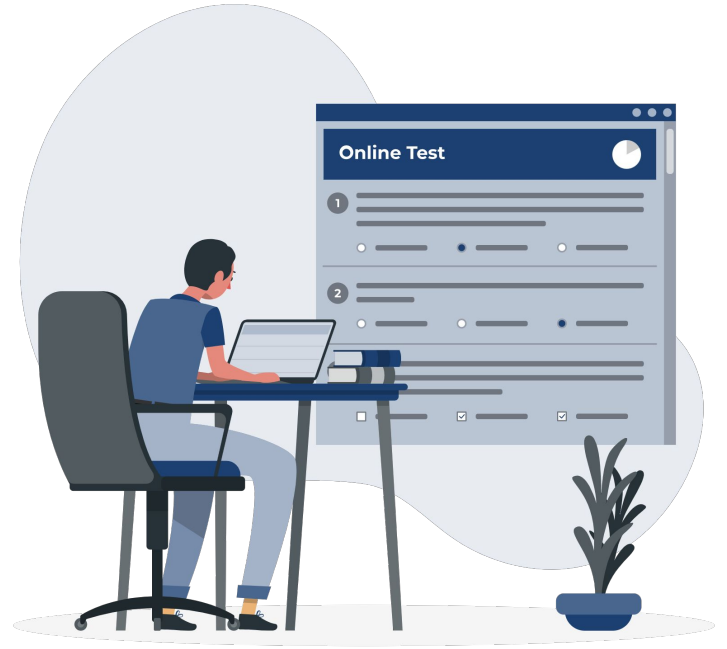
- [HMIS Part 1](#)
- [HMIS Part 2](#)
- [HMIS Skill Test](#)



# HMIS Training

The following tasks need to be completed by a new HMIS user at your agency:

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



# User Training Course

## My Online Courses

[Dashboard](#) • [My Courses](#) • [My Grades](#) • [My Memberships](#) • **[My Achievements](#)** • [My Certificates](#) • [Notifications](#) • [Edit Account](#) • [Redeem a Voucher](#) • [Order History](#) • [Sign Out](#)

## My Achievements

<p><i>Congrats!</i></p> <p><b>HMIS PART 2 TRAINING COMPLETE</b></p>  <p>HMIS Part 2 Training Complete!</p>	<p><i>Congrats!</i></p> <p><b>HMIS PART 1 TRAINING COMPLETE</b></p>  <p>HMIS Part 1 Training Complete!</p>	<p><i>Congrats!</i></p> <p><b>2020 CES DATA STANDARDS TRAINING COMPLETE</b></p>  <p>2020 CES Data Standards Training</p>	<p><i>Congrats!</i></p> <p><b>COORDINATED ENTRY TRAINING COMPLETE</b></p>  <p>HMIS Coordinated Entry Training Completed!</p>
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Tip: Agency Admins should request a screenshot of the online training course to ensure the users have completed the required training for their access role at your agency.

# 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.



# 2023 HMIS Agency Audits

- The HMIS Helpdesk Team 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 in July.
  - [2023 Agency Audit Form](#)





# 2023 HMIS Agency Audits

- The following forms must be dated in 2023 and signed (wet signature) by leadership at the agency.

[Participating Agency Agreement](#)

[Inter-Agency Data Sharing Agreement](#)

All agencies must submit signed copies of the HMIS Participating Agreement and Inter-Agency Data Sharing Agreement. Current versions of both forms are available [on our website](#). Forms must be dated in 2022 and signed (wet signature) by leadership at the agency.

## HMIS Participating Agency Agreement

or drag files here.

## Inter-Agency Data Sharing Agreement

or drag files here.

### Completed by 211OC

#### Test Agency's Active Users in HMIS



[Test Agency Active Users.csv](#)  
277 bytes



#### Test Agency's Additional Agency Access in HMIS:



[Test Agency Additional Agency Access.xlsx](#)  
15.5 KB



#### Test Agency's Program Descriptor Data for active projects in HMIS:



[Test Agency Program Descriptor Data.csv](#)  
1.1 KB



#### Test Agency's Funding Source Data for active projects in HMIS:



[Test Agency Funding Sources.csv](#)  
886 bytes



#### Test Agency's Bed Inventory Data for active projects in HMIS:



[Test Agency Bed Inventory.csv](#)  
1.4 KB



#### Email addresses at Test Agency receiving emails from 211OC



[Test Agency MailChimp Emails.xlsx](#)  
8.9 KB



# 2023 HMIS Agency Audits

- You will need to review the attached files on the audit form. These reports contain information such as active users for your agency, active projects, current bed inventory, and users in your agency that are receiving correspondence from 211 OC.
- Please review the reports and complete the audit form questionnaire 2 business days before your schedule audit meeting.

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## HMIS Participating Agency Agreement

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# Project Setup 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”

Resources: [HCD](#) and [BCSH](#)

## Grant Information

### ⊗ Grant 1

#### Funding Source \*

Local or Other Funding Source

#### Grant Identifier/Name

99-NPLH-99999-030

*If your contract includes a grant number, please enter it here.*

You selected **Local or Other Funding Source** as a funding source, please review the **AB 977** guidance to provide the appropriate grant identifier. Guidance: [HCD](#) and [BCSH](#)

#### Local or Other Funding Source \*

Dropdown menu showing options for Local or Other Funding Source:

- CalOptima (CalAIM)
- CA-HCD-Homekey
- CA-HCD-MHP
- CA-HCD-VHHP
- CA-HCD-NPLH**
- CA-County-NPLH
- CA-HCFC-HHAP1
- CA-HCFC-HHAP2
- CA-CALICH-HHAP3

#### Grant End Date



# 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 shows a graphical representation of the location of Universal Data Element errors in your projects.
- Data Timeliness Report: This report displays the number of clients entered within certain number of days.
- Location: **Launchpad>Reports>Data Analysis>Orange County System Reports>Data Quality Section**

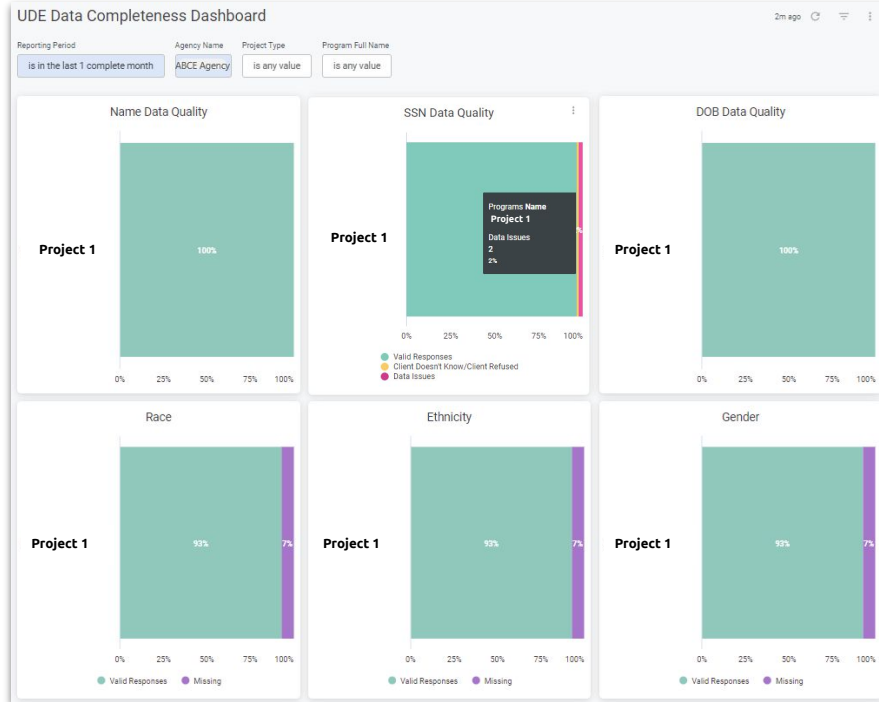
The screenshot shows the 'System' interface with a navigation menu including 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'DATA ANALYSIS' section is active, displaying 'Built In Reports' with a dropdown showing '11 report(s)'. Below this, 'Orange County Clarity System Reports' is highlighted, showing '139 report(s)'. A table titled 'Data Quality' lists various reports with 'RUN' buttons. Two reports are highlighted with orange boxes: 'Project Start Data Timeliness Report - Summary' and 'UDE Data Completeness Dashboard'.

Data Quality	
Aggregate City Prior to Project Entry	RUN
Client City Prior to Project Entry	RUN
Data Accuracy Dashboard	RUN
Data Accuracy Dashboard Details	RUN
DQ Corrections Report - Report Cards	RUN
Project Exit Data Timeliness Report - Details	RUN
Project Exit Data Timeliness Report - Summary	RUN
Project Start Data Timeliness Report - Details	RUN
Project Start Data Timeliness Report - Summary	RUN
Services Data Timeliness Report - Details	RUN
Services Data Timeliness Report - Summary	RUN
UDE Data Completeness Dashboard	RUN
UDE Data Completeness Dashboard Details	RUN

# Data Quality Reports

## UDE Data Completeness Dashboard:

- Use this report to quickly see DQ errors by project
- Use the filters to adjust the reporting period, review only your agency's data, see only a particular project type, or a particular project.
- Each tile is a data element with color coding to help identify errors:
  - Green bars are "Valid Responses",
  - Yellow bars are "Client Doesn't know/Client Refused"
  - Purple is "Missing" Data.
  - Pink is "Data Issues"
- Interactive functionality allows you to see each client record containing issues and enables immediate correction.



SSN Data Quality

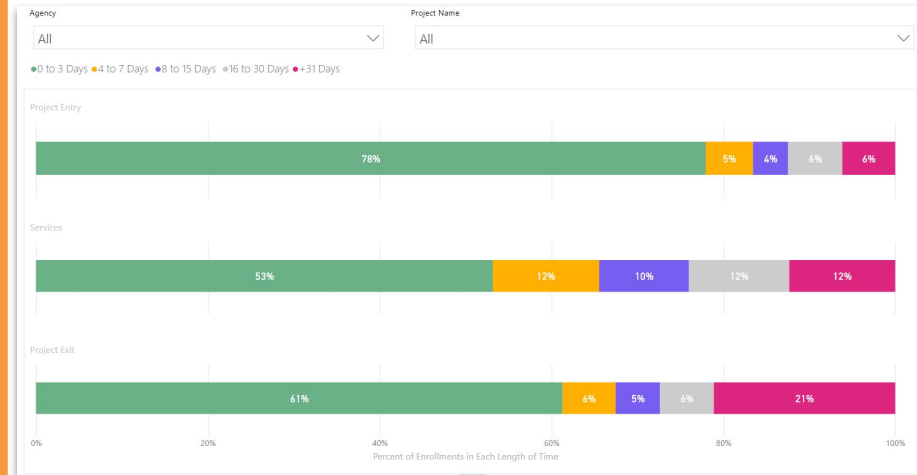
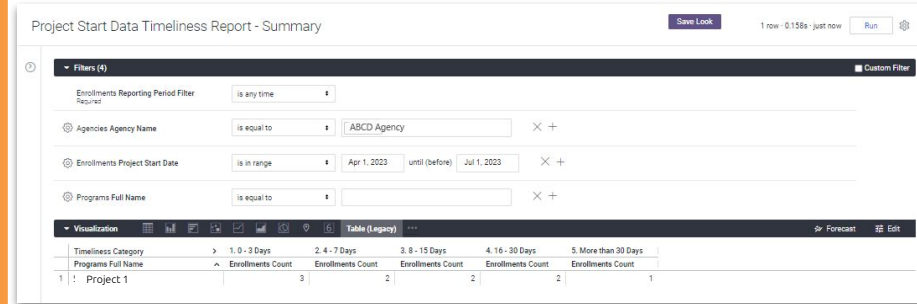
HMS PERFORMANCE (8 Filters)

Personal ID	Enrollment ID	Head of Household (Yes / No)	Name	Project Start Date	Project Exit Date	Housing Move-in Date
123456	987654	Yes	Project 1	2023-04-14		
123457	987655	No	Project 1	2023-01-20		

# Data Quality Reports

## Data Timeliness Reports:

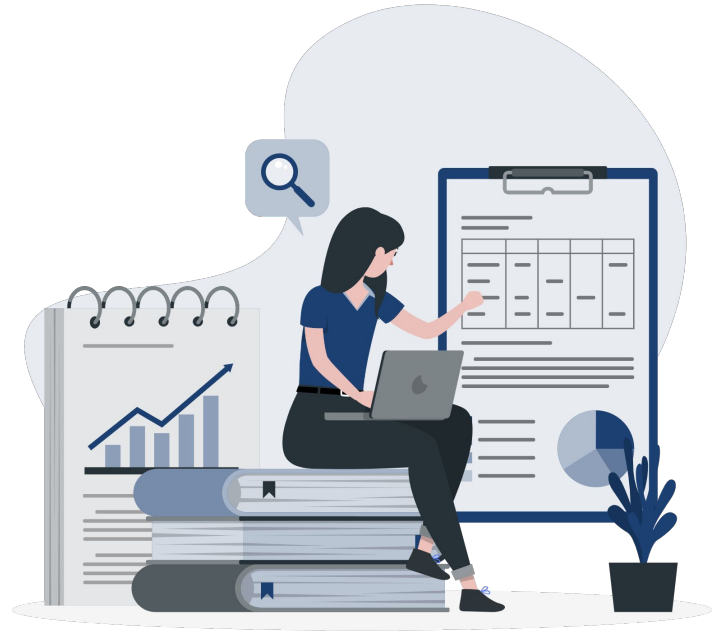
- Use these reports to review projects where timeliness may be a factor and adjust procedures to correct future issues.
- Adjust filters to a desired reporting period, certain enrollment-specific dates, or a particular project.
- Each table shows the project and the number of clients who were entered within time ranges.
- Interactive functionality allows you to see each client record containing issues and enables immediate correction.



# Potential Duplicate Client Records

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- 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



# Duplicate Client Records

- Before creating a new client profile search to see if a client record already exists
  - KB: [Searching For a Client Record](#)
- Run the Duplicate Clients Report to identify potential duplicate client records
  - Submit a ticket to the HMIS Helpdesk to merge the duplicate records

## SEARCH FOR A CLIENT

Q ma si



Marge Simpson



Maggie Simpson



Marge Simpson

## REPORT LIBRARY

### Favorite Reports

### Data Quality Reports

[DQXX-103] Monthly Staff Report

★ | ⏻ RUN

[DQXX-110] Duplicate Clients

★ | ⏻ RUN



# 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.

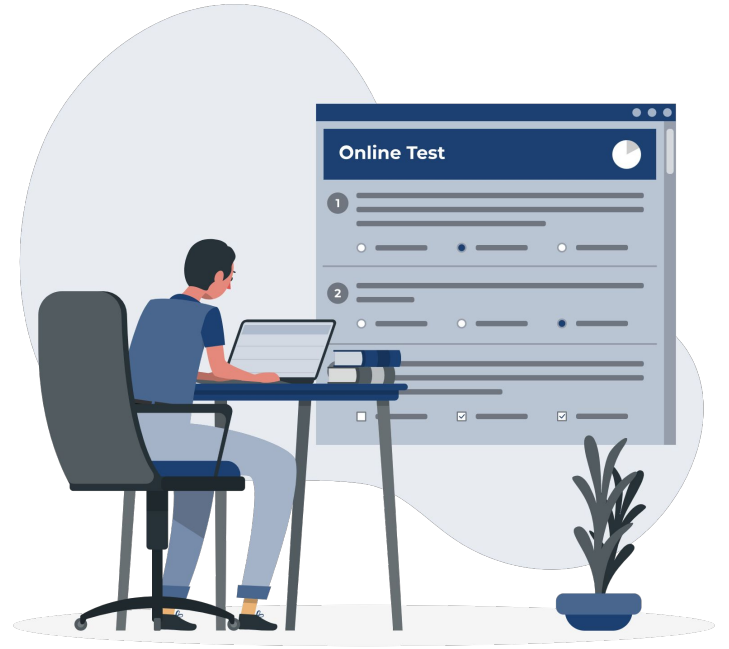
Agency Administrators will have until EOD on July 21st to download any files that are stored in agencies' DropBox folders before they are permanently deleted.



# HMIS Data Analytics On-Demand Course

The course will equip participants with an analytic framework, set of skills, and best practices regarding an ad hoc analysis of Homeless Management Information System (HMIS) data to successfully create insight-driven data and reporting projects.

HUD Exchange: [Cohort 9: July 10, 2023 – Sept 1, 2023](#)



# Training: HUD's Equal Access Rule

The Office of Care Coordination will be hosting a training on the Equal Access Rule established by the U.S. Department of Housing and Urban Development (HUD).

Through this training, service providers will learn how to effectively implement HUD's Equal Access Rule to ensure fair housing and shelter opportunities for people experiencing homelessness, as well as ensuring the preservation of families accessing housing and shelter. Please find details on the upcoming training below:

Date: Wed, July 12th

Time: 3:00pm -4:00pm

Please register to attend by Tuesday, July 11, 2023 at [https://zoom.us/webinar/register/WN\\_h4z3TuxvTzCtsnB\\_ZzOkqQ](https://zoom.us/webinar/register/WN_h4z3TuxvTzCtsnB_ZzOkqQ)



Graphic by <https://storyset.com/online>

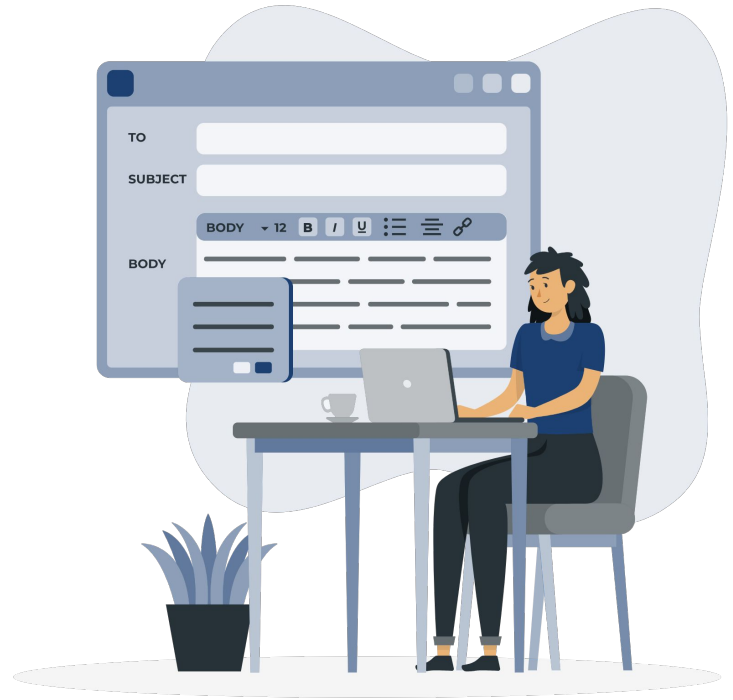
# Sending Client Information to the HMIS Help Desk

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.



# Sending Client Information to the HMIS Help Desk

The easiest way to let the HMIS Help Desk know which client and enrollment you need help with is to send us the link to the client's enrollment.

You may also send the Client's Identifier (along with the name of the Program they are enrolled in and the Client's Program Start Date), which you can find on the Client's Profile page under the photo section on the Profile tab.

KB: [Sending Client Information to the HMIS Help Desk](#)

The screenshot displays a web browser window with the URL <https://octrain.clarityhs.com/clients/99/program/16079/enroll>. The page title is "Marge Simpson" and the navigation menu includes PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, FILES, SERVICES, CONTACT, and LOCATION. The main content area shows "PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM" and a sub-menu with Enrollment, History, Assessments, Goals, Notes, Files, Forms, and an Exit button. Below this, it says "Enroll Program for client Marge Simpson" and "Project Start Date 12/01/2022".

The "CLIENT PROFILE" section contains the following information:

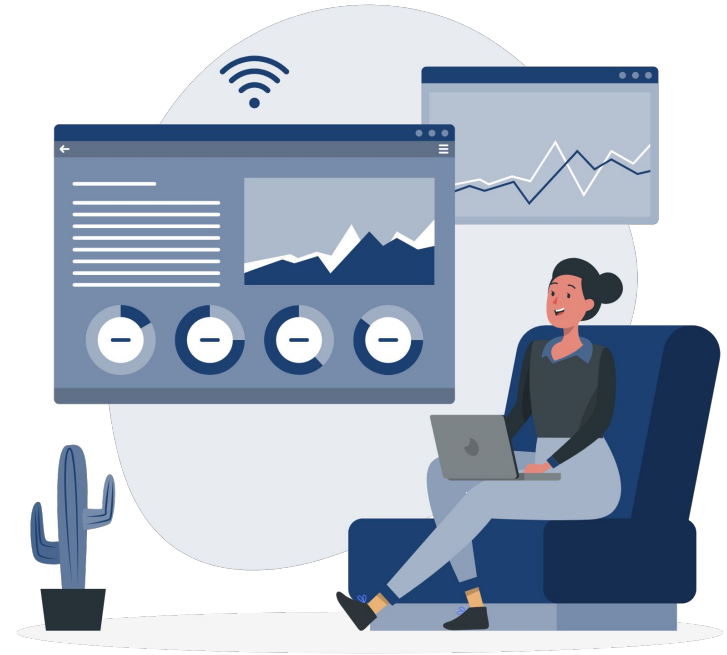
Social Security Number	XXX - XX - 1968	
Quality of SSN	Full SSN Reported	▼
Last Name	Simpson	
First Name	Marge	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	02/01/1965	Adult. Age: 58

To the right of the profile information is a cartoon image of Marge Simpson. Below the image is a box containing the text "UNIQUE IDENTIFIER A0036C0F5" with a small circular icon to the right.

# Project Performance Report

The Emergency Shelter Project Performance Report will be published next Thursday.

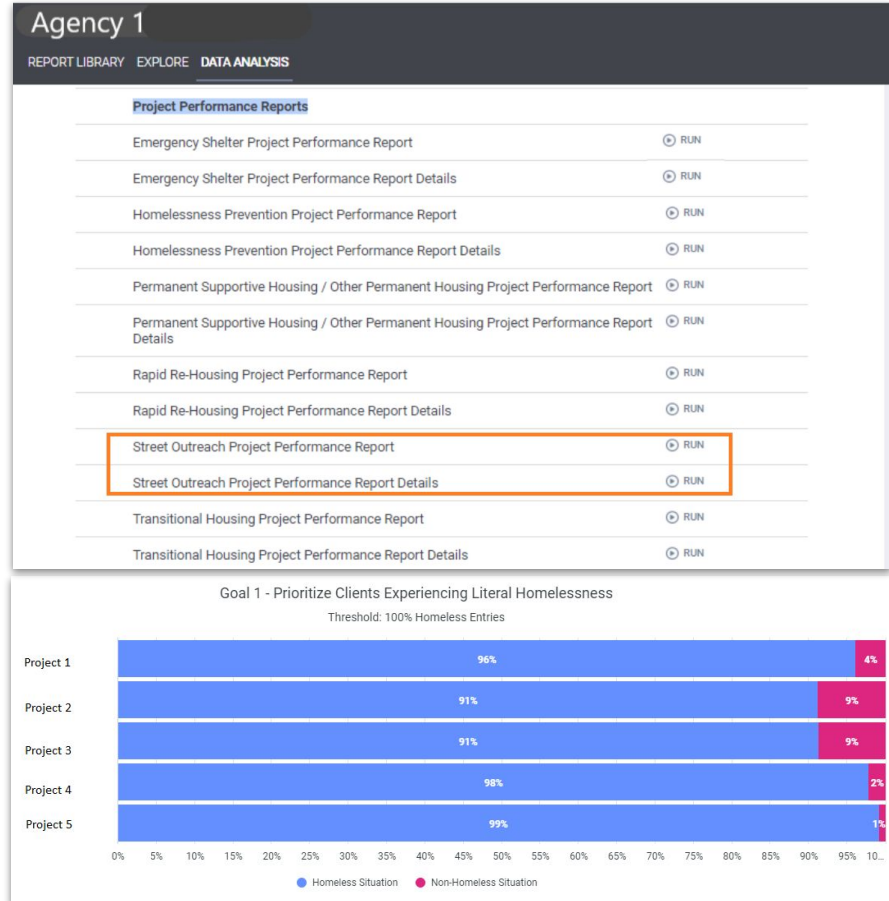
- Project Performance Reports highlight different measures that HUD and the CoC have determined are important in effectively ending homelessness for the clients in Orange County.
- Please review the [Project Performance Overview](#) document for details regarding the schedule of these reports, a description of each measure, and the threshold for each project type.



# Project Performance Report

Upcoming report: Street Outreach

- Review the [Project Performance Report Overview](#) for applicable goals
- Reports>Data Analysis>Orange County Clarity System Reports>Project Performance Reports** section
- Review data & perform data cleanup



# Q&A

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



Thank you  
Have a great day!

Next User Meeting: Aug 2nd