OC HMIS User Meeting Webinar Minutes
8/2/23

Contents

Agenda Items

Disabling Condition Field

Data Collection Rationale: To indicate whether or not clients have a disabling condition. This data element is to be used with other information to identify whether a client meets the criteria for chronic homelessness.

Data Collection Instruction: Record whether the client has a disabling condition at the time of each project start. A disabling condition is a physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:

1. Is expected to be long-continuing or of indefinite duration;
2. Substantially impedes the individual's ability to live independently; and
3. Could be improved by the provision of more suitable housing conditions.

There will be instances in which you will need to update the client's disabling condition. Here are two scenarios that will help you decide the best process for the update:

Scenario #1 - The client always had a disabling condition but it wasn't noted in their enrollment. In this case, you should update the client's enrollment screen with the disabling condition. Set the Disabling Condition to "Yes" then select one of the categories of disabling conditions.

Scenario #2 - The client may have a change in their disabling condition status that was not present at the time of enrollment. In this case, you will need to do a Status Assessment which will track the change to the disabling condition for the client.

Please feel free to review the Disabling Condition Field KB and Disabling Condition Flowchart for additional information.

Enrolling Clients into Coordinated Entry System (CES)

Please review the Coordinated Entry System (CES) for Case Managers KB for additional details.

Step 1: In order to enroll a client into CES, please make sure you are logged into the County of Orange agency. Click on the agency under your name in the top right corner of HMIS and switch to County of Orange. Users must be approved for access by the agency managing the Coordinated Entry project, reach out to your AA if you do not see the County of Orange agency as an option

Step 2: If the household is not already in HMIS, create a Client Profile for all household members.

Step 3: Create an enrollment for all household members under the appropriate Coordinated Entry project in HMIS.

- It is critical for clients to answer the Program Entry questions completely and accurately to ensure they are matched to housing opportunities as quickly as possible

CES Assessments

In order to be served through the Coordinated Entry System, households must be enrolled in a Coordinated Entry project, and complete the Current Living Situation Assessment and ONE of the following CES Assessments:

- Individual CES Assessment
- Family CES Assessment
- Veteran Coordinated Entry Assessment [OC Custom]

Users can complete the CES assessments by editing the appropriate CES enrollment and then clicking on the assessments tab. Only one CES assessment should be completed per enrollment.Only one CES assessment should be completed per enrollment and the assessment only needs to be completed for the Head of Household.

Current Living Situation Assessment for CES

The [Current Living Situation (CLS) assessment] is required for all clients participating in the Coordinated Entry System:

CLS Assessments should be completed for CES clients:

- When a CES Assessment or Coordinated Entry Event is recorded.
- When the client's living situation changes
- When 90 days has passed since the last CLS Assessment

To complete the CLS Assessment, edit the client enrollment, and navigate to program based assessments tab If a temporary or permanent housing situation is selected, answer the additional housing status questions to determine whether the client meets HUD's definition of imminent or at-risk of homelessness.

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:

Step 1: Ensure the household is enrolled in the Individual or Family CES Project

Step 2: Upload the Head of Household's (HoH) Homelessness Verification into HMIS

Step 3: Add the Needs Bed Reservation Assistance service

Step 4: Complete the Current Living Situation and Bed Reservation Assessment. Refer HoH to the Bed Reservation System.

Step 5: Confirm the Household still needs Bed Reservation Assistance

- Add a new Needs Bed Reservation Assistance service into HMIS for the Head of Household every 7 days in order for the household to be considered for any units that become available.

Edit Opportunities in HMIS

For adding housing opportunities, each housing agency is responsible for entering and updating any housing opportunities at their agency.

- This can be done by accessing the Availability tab on the Referrals page.
- Each agency must enter their project's housing opportunities in order to receive matches from either Community Queue.

Once a housing opportunity has been created, the opportunity can be edited or deleted on the Availability tab of the Referrals page by clicking on the drop-down for the project, and clicking on the Edit or Delete buttons next to the housing opportunity.

- For you editing housing opportunities, please note that Housing Providers need to review the opportunities to ensure it's accurate and updated. If a referral is denied the opportunity is now open again.

For more information please refer to [Adding and Editing Housing Opportunities] Knowledge Base article

History Tab

The client history tab is a useful resource to edit, view, and manage the client's profile.

- There is Color coding for the history tab in HMIS to distinguish between Coordinated Entry events and other historical items.
- A section dedicated to reviewing a client's profile for CES workflow to assist with those working with CES participants.

For more information please refer to [History Tab Overview] Knowledge Base article

HMIS Account Update & Testing Form

There is an update with the [HMIS Account & Testing Form]. When an Agency Administrator (AA) is filing out the form and indicating a user needs Individual and/or Family CES, the AA will be asked a follow up CES question.

The AA will select the primary role the user holds at their agency.

HMIS Project Close Out Active Clients

A project cannot be closed out if there are still active enrollments.

Agency Administrators can run the [GNRL-106] Program Roster to review the current roster to ensure all clients have been exited from the project.

- Pathway: Report Library > Program Based Reports > [GNRL-106] Program Roster
- Set the status to Active within Report Date Range

Group Enrollment Pop-Up Notification

Clarity Update: If a user tries to enroll a client into a group enrollment for a program in which the client already has an active enrollment, the system will allow the client to be enrolled. However, the system will display the following pop-up:

- "Please note that at least one of these household members has an active enrollment in this program. To continue with the creation of this enrollment, please select the "OK" button below."

Use this warning to help avoid duplicate enrollments. If the client was enrolled as an individual and needs their program enrollment merged with their household members, reach out to the Agency Administrator to request support from the HMIS Helpdesk.

Grant Consolidation and Closing Projects

Clients may need to be moved from one HMIS project to another due to circumstances such as grant consolidation. The method by which this is done in HMIS can impact future reporting in Annual Performance Reports (APRs) and System Performance Measures (SPMs).

HUD has provided the Grant Consolidation and Closing Projects: How to handle client data in HMIS guidance to assist agencies in this process:

- Provides guidance on circumstances that may require a client/group of clients to be moved
- Covers methods with client transfers and project transfers and the implications for each method

This is a case by case situation so it's best after reviewing the document to submit a ticket to the HMIS Helpdesk so that we can support your agency in the process.

CoC Dashboard

The CoC Dashboard contains information on clients who were active in any project type in HMIS or who contacted 211OC for information and referral. The latest CoC dashboard has just been published:

- Quarter 2 : Apr - Jun 2023
- Location: ochmis.org > Reports > Orange County CoC Dashboard

Data Quality Report Cards

The Q2 Data Quality Report Cards will be published shortly. The Report Cards looks at the following:

- Data Completeness, Data Accuracy and Data Timeliness

The report card will have a 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 also include the Agency and Project Name filters.

Project Performance Report

The Emergency Shelter Project Performance Report is published. The Street Outreach Project Performance Report will be published Thursday, August 10th.

The upcoming report is Homelessness Prevention, 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

Training Opportunity: Trauma Informed Care

The Office of Care Coordination will be hosting a training on Trauma Informed Care. Through this training, service providers will learn the basics of trauma and how it impacts the delivery of homeless services, understand the principles of trauma informed care, and identify ways to incorporate principles into service delivery practices.

Date &Time : Thursday, August 10, 2023, 1:30 p.m. – 3:00 p.m.

Please register to attend by Wednesday, August 9, 2023

Holiday

The HMIS Help Desk will be closed on Monday, September 4th for Labor Day. We will be back in the office to assist you on Tuesday, September 5th.

Q&A

- Q: For Current Living Situation Assessments in CES, will there be a reminder to update after 90 days?
    - A: There is no reminder notification in HMIS for the Current Living Situation Assessment. You can run the following reports to ensure your clients at active on the Community Queue.
        - Active Clients Report - Use this report to see all clients active in a Coordinated Entry project for each CES component
        - CES Clients Active with Service Provider & on CES CQ - Use this report to review clients enrolled in CES with an active enrollment at your agency

- Q: What about entering clients onto the queue? Regarding the final step of the toggle and add the client to the queue.
    - A: Yes, once you complete the CES Assessment you will be taken to another screen which will ask if you want to refer the client to the community queue.

- Q: Will we receive a copy of this training?
    - A: In our newsletter we have information on the slides, the meeting minutes, and recorded training. All previous meeting materials are also available on our website.

- Q: We also need to upload their third party-chronic verification and disabling condition verification in order to officially get them into the community Queue correct?
    - A: Yes, part of the process is to review files that a client has under the File tab and upload verification documents as needed. Coordinated Entry System (CES) for Case Managers

- Q: So if we don't enroll the client each week they are off the bed reservation list?
    - A: The client is already enrolled in the Coordinated Entry program. You will add the Needs Bed Reservation Service every 7 days so the CES Leads/Matchmakers are aware that the household is still in need. If a service expires, the referral will also expire so you must update the client's Needs Bed Reservation Service every 7 days to keep them active on the queue.

Future Meeting Information

September 2023 HMIS User Meeting Webinar

- Date: Wednesday, September 6th, 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.