Welcome!

August 2023
OC HMIS User Meeting

Please enter your agency name in the chat box

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Agenda

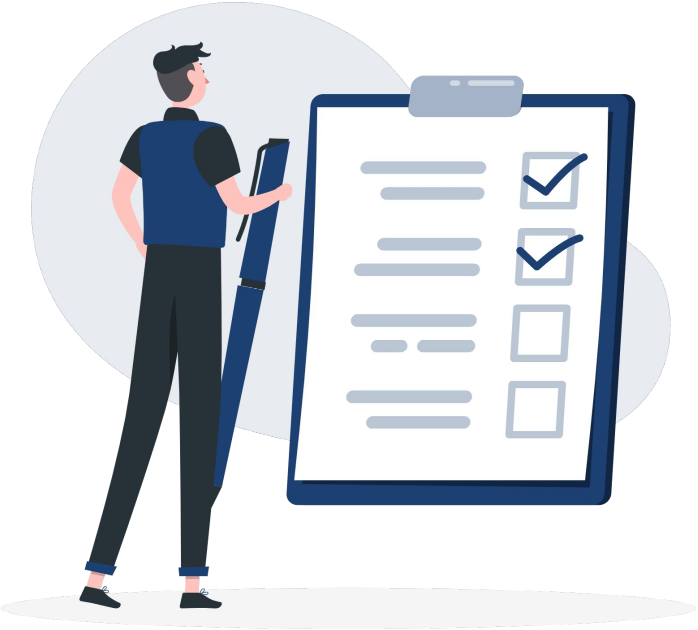
1. Disabling Condition Field
2. CES Assessments
3. Bed Reservation Process
4. Edit Opportunities in HMIS
5. History Tab
6. HMIS Account Update & Testing Form
7. Project Close Out
8. Group Enrollment Pop Up Notification
9. Grant Consolidation and Closing Projects
10. CoC Dashboard
11. Data Quality Report Card
12. Project Performance Report
13. Training
14. Holiday
15. Q&A
16. Office Hours

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.

Disabling Condition Field
Project Type Applicability: All Programs - All Components
Data Collected About: All Clients
Collection Point: Project Start
Screens in HMIS: Enrollment Screen

Disabling Condition Field KB



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Disabling Condition Field

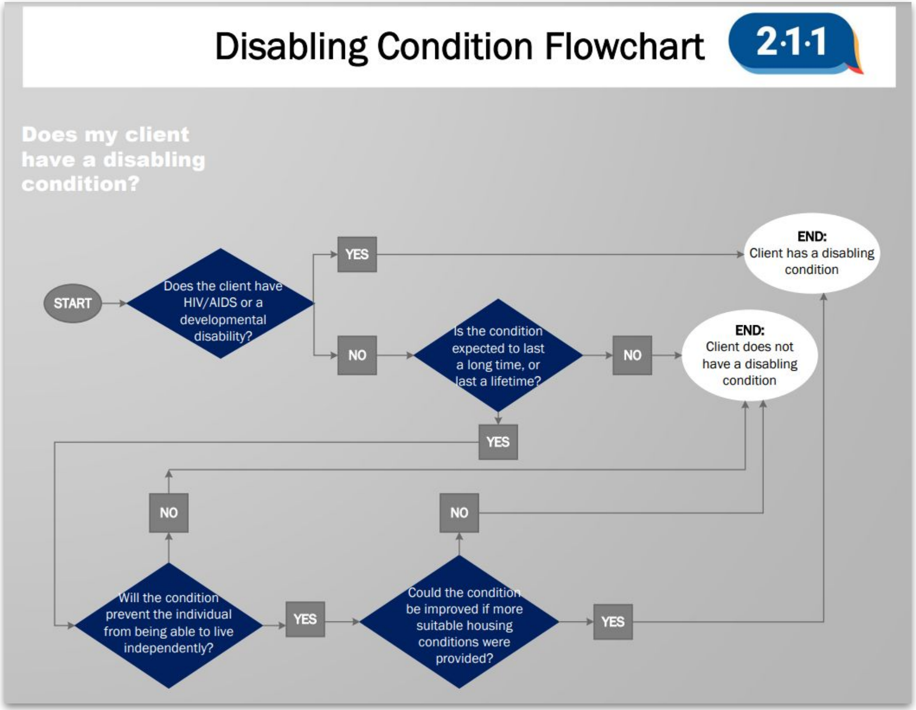
Data Collection Instruction: Record whether the client has a disabling condition at the time of each project start.

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.



[Disabling Condition Flowchart]

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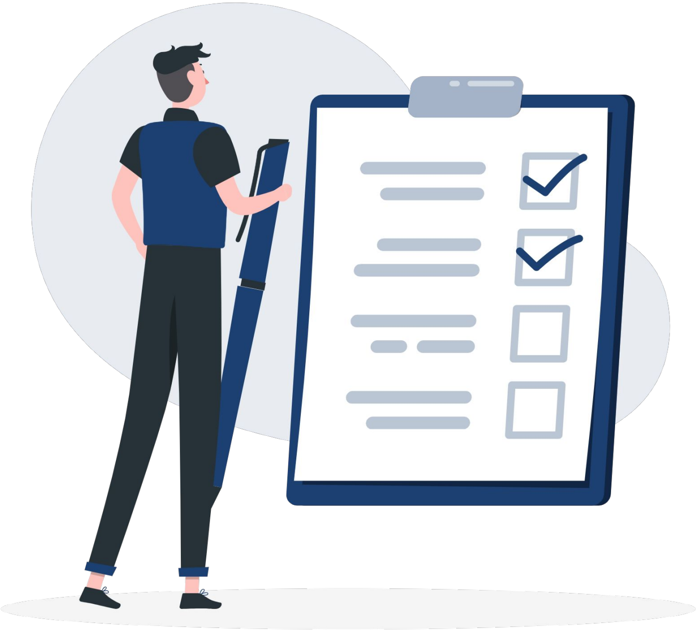
Updating Disabling Condition

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.



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Enrolling Clients into Coordinated Entry System (CES)

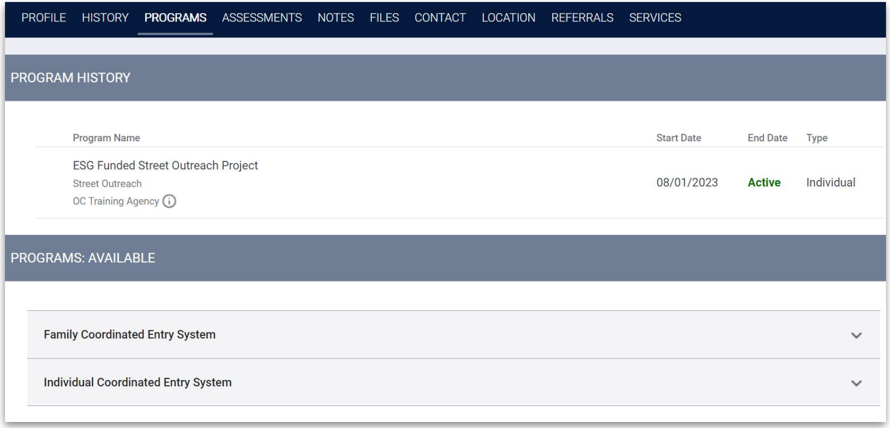
Step 1: In order to enroll a client into CES, please make sure you are logged into the **County of Orange** agency.

- 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

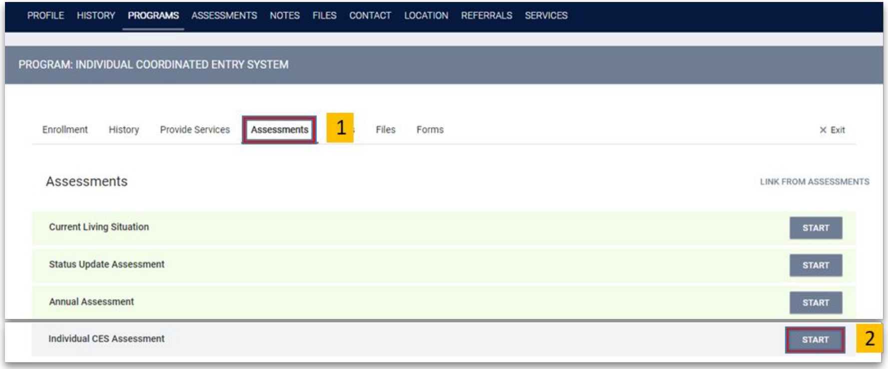


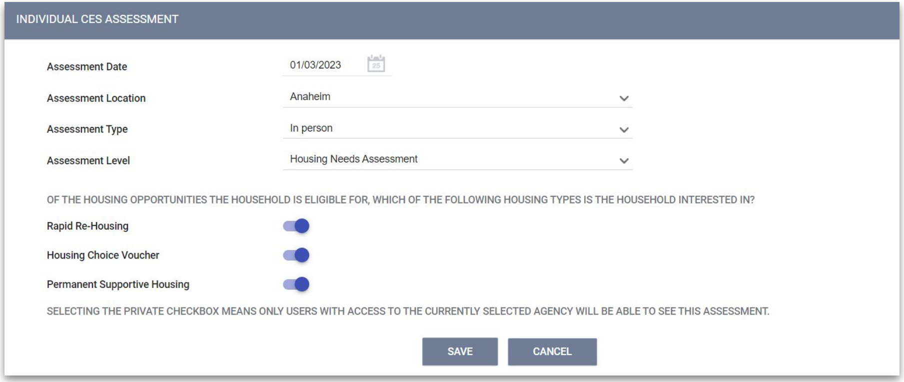
CES Assessments

In order to be served through the Coordinated Entry System, households must be enrolled in a Coordinated Entry project, and complete the appropriate CES Assessments

- **One** of the following CES Assessments
  - Individual CES Assessment
  - Family CES Assessment
  - Veteran Coordinated Entry Assessment [OC Custom]
- A Current Living Situation Assessment

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.**





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Current Living Situation Assessments for CES

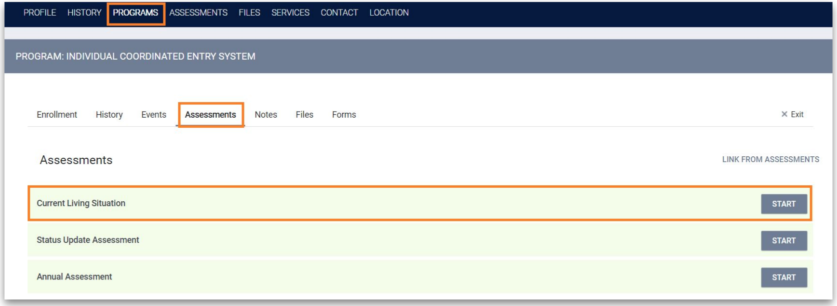
The Current Living Situation (CLS) assessment is required for all clients participating in the Coordinated Entry System

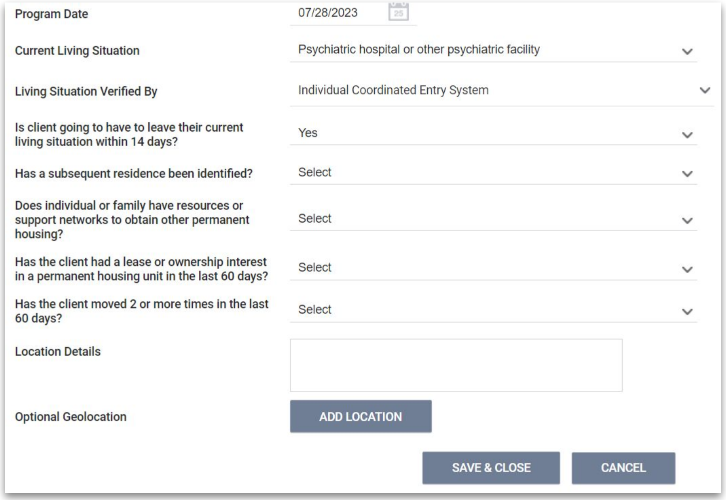
CLS Assessments should be completed for CES clients:

- 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.





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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

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.

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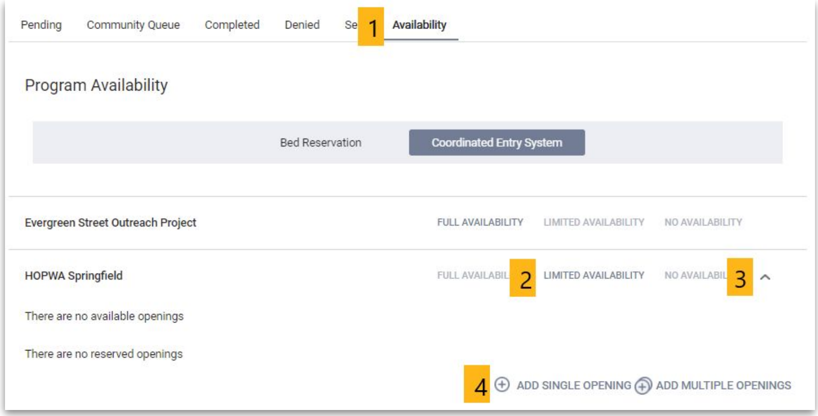
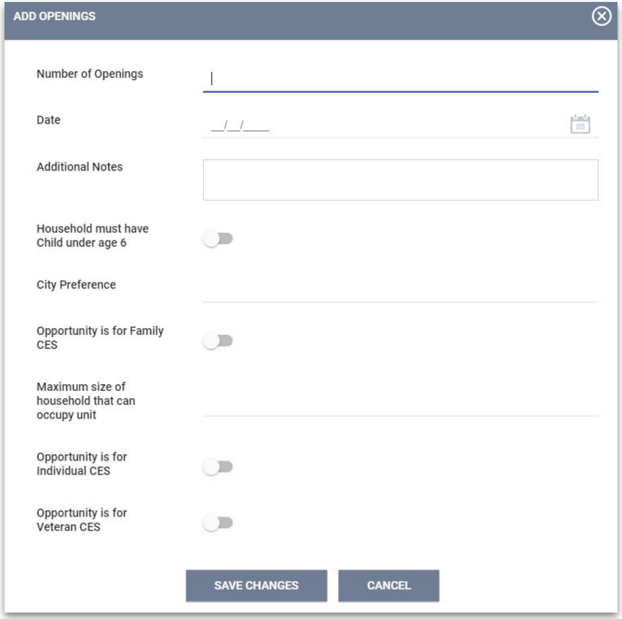
Adding and Editing Housing Opportunities

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.

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

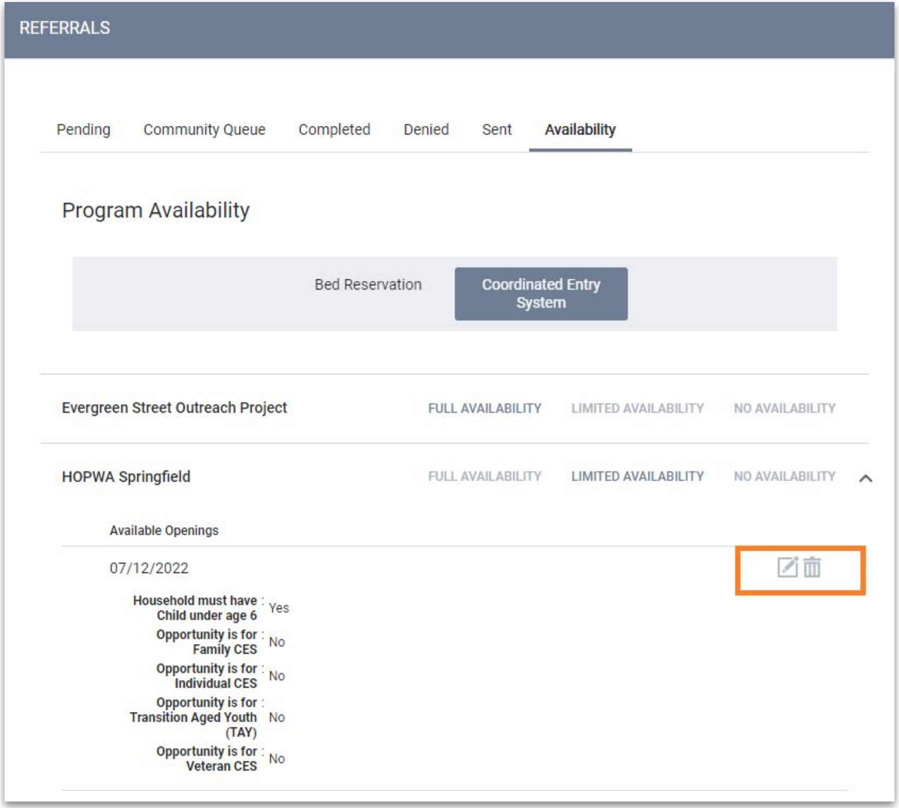




Adding and Editing Housing Opportunities

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

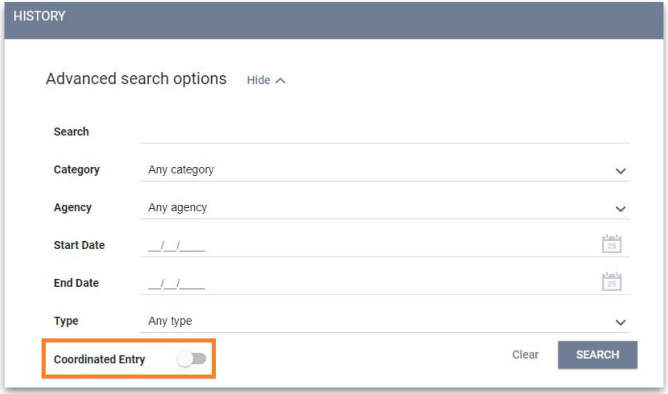


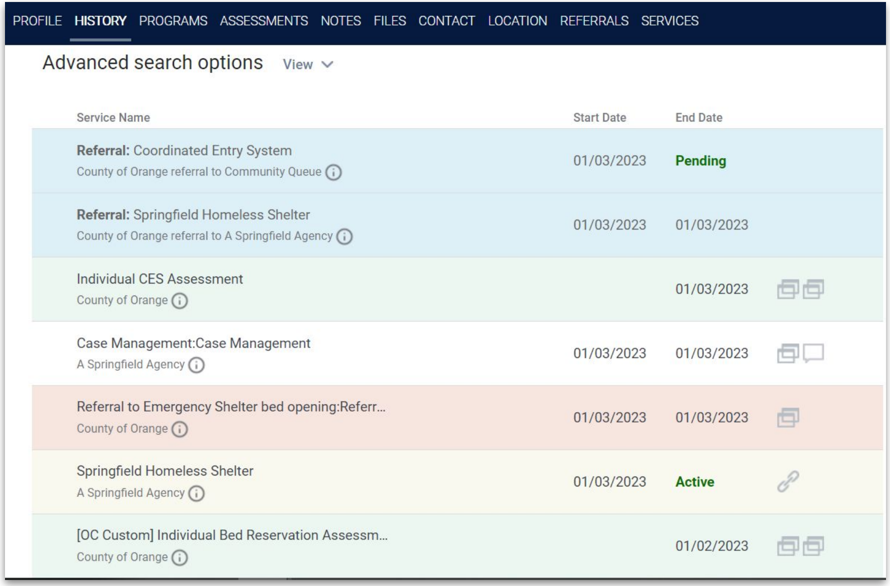
History Tab

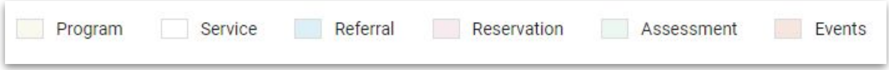
The client history tab is a useful resource to edit, view, and manage the client's profile.

- 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







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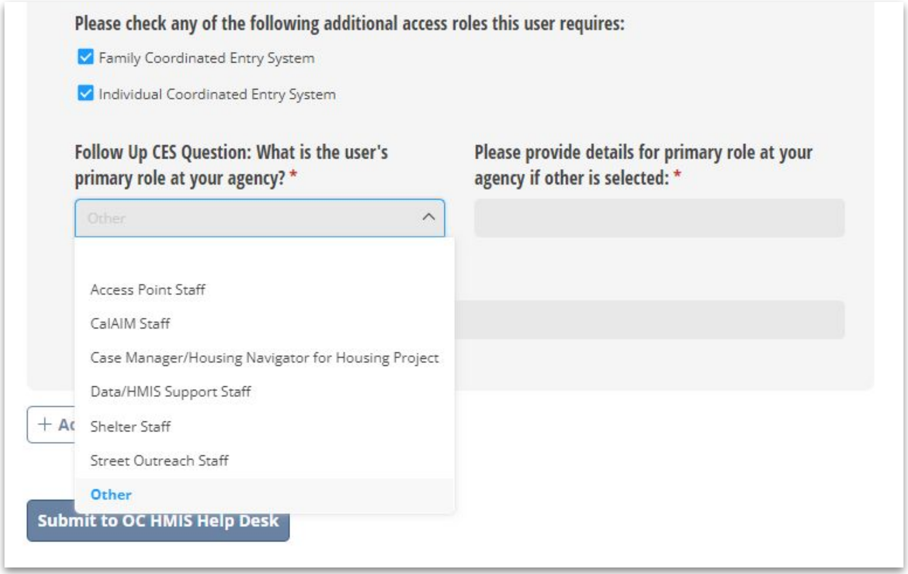
HMIS Account Update & Testing Form

There is a **NEW** update with the HMIS Account & Testing Form. When an Agency Administrator (AA) is filing out the form and indicate 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.



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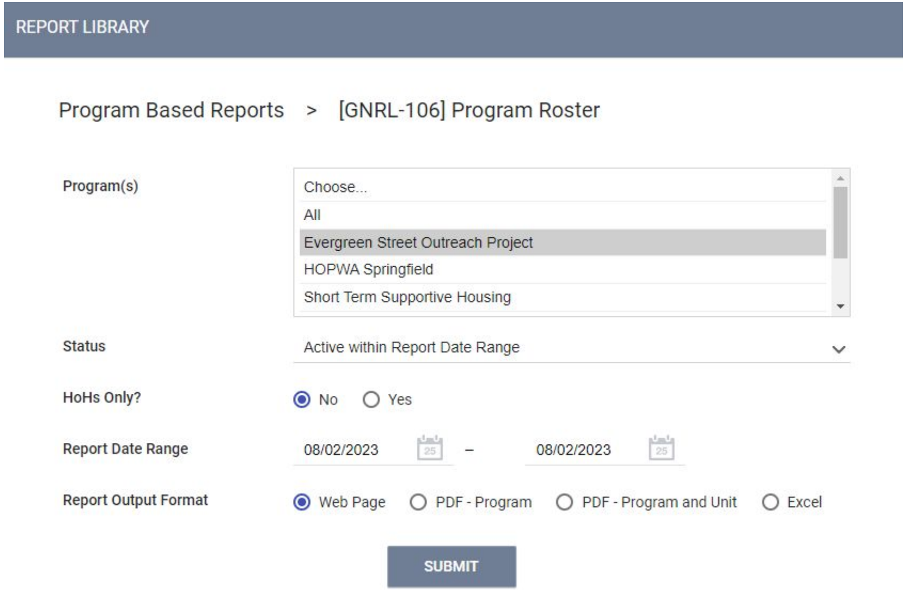
HMIS Project Close Out Active Clients

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

Agency Administrators can run the [GNRL-106] Program Roster to review 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



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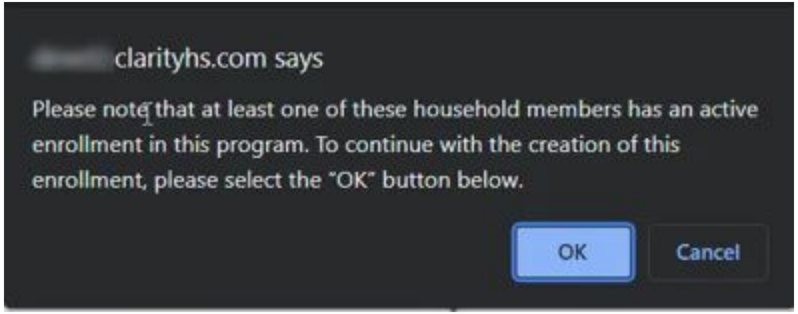
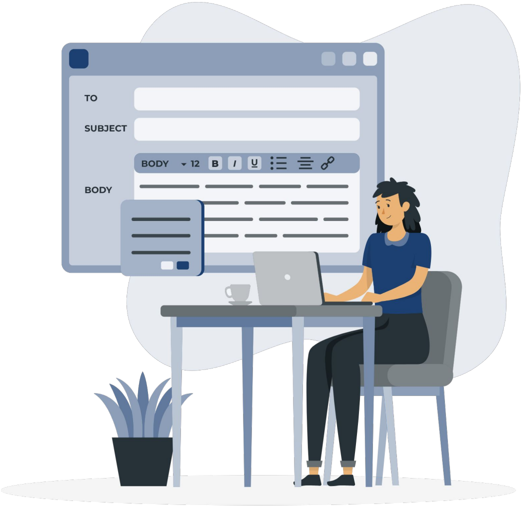
Group Enrollment Pop-Up Notification

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."





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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:

- 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

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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.

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

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Data Quality Report Cards

Q2 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 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.

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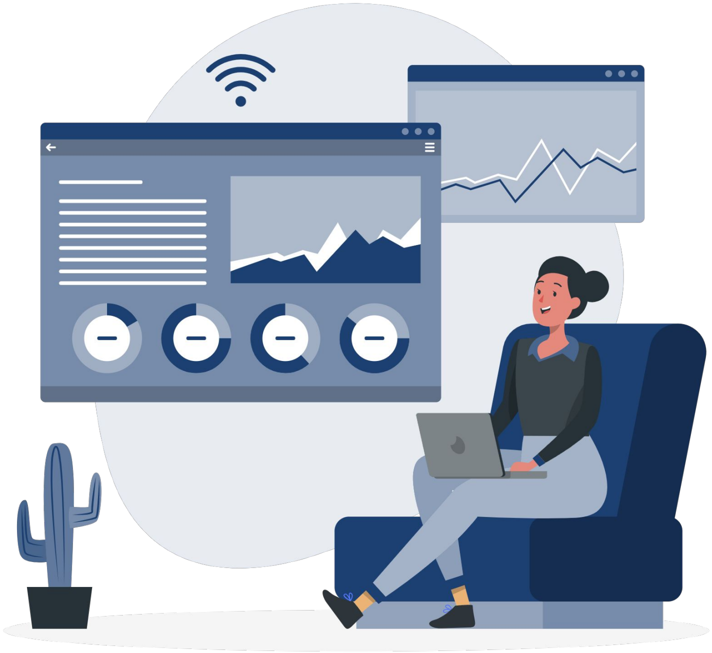
Project Performance Report

The Emergency Shelter Project Performance Report has been published!

- 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.

The Street Outreach PPR will be published next Thursday.

Please keep an eye out for the Homelessness Prevention PPR Draft data in DropBox.



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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.

This virtual training requires registration.

Date: Thursday, August 10, 2023
Time: 1:30 p.m. – 3:00 p.m.
Please register to attend by **Wednesday, August 9, 2023**

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Holiday Observed

The HMIS Help Desk will be closed on **Monday, September 4th** in observance of **Labor Day.**

We will be back in the office to assist you on Tuesday, September 5th.

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Q&A

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

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Thank you
Have a great day!

Next User Meeting: Sept 6th