OC HMIS User Meeting Webinar Minutes
10/4/23

Contents

Agenda Items

FY 2024 HMIS Data Standards

HUD has released the FY2022 HMIS Data Standards Manual. These changes will be implemented in HMIS as of October 1st, and include updates for the screens/projects below.

- Client's Profile
- Enrollment & Exit Screens
- All Projects
- HOPWA Funded Projects
- RHY Funded Projects
- SSVF Funded Projects

FY 2024 HMIS Data Standards - Review

For the 2024 Data Standards updates, with the changes to certain fields when appropriate please discuss the following fields to ensure that the data is correct:

- Race/Ethnicity

- Gender
- Sexual Orientation

Service providers will need to determine the appropriate time to discuss these fields, likely during an annual assessment.

The Client Data Collection Forms will be updated with the 2024 HMIS Data Standards. This is an ongoing project, we will be publishing additional English and Spanish forms as they become available. The forms are available on the OC HMIS web site under the HMIS Forms and Documents tab in the Client Data Collection Forms section

The following forms have been updated with the 2024 HMIS Data Standards

- No Federal Funding - English Intake and English Exit
- Coc/ESG - English Intake and English Exit

HMIS Project Setup Form

The HMIS Project Set Up form has been updated to match the FY 2024 HMIS data standards:

1. a. Emergency shelter project type is now: Emergency Shelter - Entry Exit Emergency - Night-by-Night.
b.PH – Rapid Re-Housing includes a sub type RRH: Services Only RRH: Housing with or without services

Please see pages 27-30 of the FY2024 HMIS Data Standards to determine the correct program type for your program.

2.a.Does this project conducts CE access activities? (Please review page 43 - 45 of the FY2024 HMIS Data Standards for additional details)

b. A Yes response is indicating this project accepts referrals and placements from Coordinated Entry

Annual Performance Report

HUD requires Continuum of Care (CoC) recipients to submit Annual Performance Reports (APR) within 90 days from the end of their grant operating year. HUD uses the APR to track the progress and performance of HUD-funded grants.

Q6a Data Quality: Personally Identifiable Information (PII)

This question reports the unknown or missing information about each PII element as well as other data issues with some elements.

PII means - name, date of birth, gender, race/ethnicity or social security number that would allow the user to be able to identify the client in the database.

Complete PII is critical to a system's ability to de-duplicate and merge client records. Data issues look at any record where information is not present because the client didn't know the response, preferred not to provide a response, the information was missing, or where the response is not consistent with protocols established for the data quality of the element.

- Review and identify client records flagged in section Q6a. Correct as appropriate.
- Client Doesn't Know/Client Refused - There should not be any clients who don't know or refuse Name or Date of Birth because these are required for all clients
- Information Missing Column - Any value that is in the "Information Missing" column is an error. For Name, SSN, or DOB, this means the Data Quality/Type question has not been completed.
- Some cases you may need to leave a note with your report submission. For example, newborns who don't have a SSN. This data field will need to be updated once the information is available.

Q6c Data Quality: Income and Housing Data Quality
This question reports errors associated with the core performance measures housing destination and income.

"Information Missing" Errors:

Destination 3.12

- "Data not Collected" and "No exit interview" will be errors
- Annual Assessments not completed or Annual Assessments completed outside the 30 day window

Income and Sources (4.02) at Start

- "Income from Any Source" is "Yes" but a source and amount is not entered.

Income and Sources (4.02) at Annual Assessment

- "Income from Any Source" is "Yes" but a source and amount is not entered.
- No Annual Assessments completed or assessment completed outside the 30 day window

Income and Sources (4.02) at Exit

- "Income from Any Source" is "Yes" but a source and amount is not entered.
- "No exit interview" responses

APR Preparation Dashboard

The Annual Assessment Report was designed to find common errors with enrollments which might cause problems when submitting the APRs.

To Access: Reports >Data Analysis> Built In Reports>APR Preparation Dashboard

The Dashboard contains the following elements:

Tiles

- Project Start After Project Exit
- DoB AFTER Project Start
- Move-in Date AFTER Project Exit
- Move-in Date Before Project Exit
- Households with More than One HoH

Annual Assessment Status Graph - the graph contains markers for "Completed", "Completed out of range", "Due in 30-60 days", "Past Due", and "Due".

For additional information, please review the APR Submittal Preparation Dashboard.

Head of Household Errors

HMIS Materials can be found on the OC HMIS website
- Located under the Meetings tab
- HMIS User Meeting Materials or Data and Performance Management Meeting Materials

Important HMIS Dates can be found on our calendar accessed through our website
- Locate the menu on the left hand site of our website
- Click on the OC HMIS Calendar to view important dates coming up regarding HMIS

HMIS Account Update Form

A friendly reminder that only Agency Admins can submit HMIS Account Update forms on behalf of a user.

- Have user submit a screenshot of their online training transcript to verify all the appropriate training courses are complete for their access role
- For users who need access to CES, make sure to select the correct CES the user will participate in
  - Select the access role they hold at your agency
  - Housing Provider is a new option

Logging into Clarity

Please review the Knowledge Base article Troubleshooting Logging into HMIS for additional information.

Tip #1 Accessing the Clarity Live Site
- https://oc.clarityhs.com/login - Live

Tip #2 Password Reset Link Not Working
- You may have missed the time frame to reset your password and will need to request to reset your account password again.

Tip #3 Disabled due to Inactivity
- Your account will be set to inactive if you have not logged into Clarity for 60 days. If your account was reactivated you will need to login within 24 hours.

Tip #4 No Password Reset Email
- Please check your spam folder for the reset email.

Project Performance Report

The [Permanent Supportive Housing and Other Permanent Housing Project Performance Report](#) has been published. Please review the [Project Performance Report Overview](#) for applicable goals.

Keep an eye out for the Rapid Re-Housing Goal 10 Draft data in 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: HMIS Data Analytics On-Demand Course

HUD is hosting a self-paced online HMIS data analytics course that you can participate in starting October 16, 2023. The course will provide a basic overview of the following:
- HMIS data standards
- How to pull an HMIS comma-separated value (CSV) file set, unless the participant has access to someone who can pull HMIS reports for them
- How to enter data into Excel and navigate within it

To signup and access the course click the link posted on our website or [here](#)

Q&A

Please refer to the [FY2024 HMIS Data Standards for additional guidance](#) on the data elements.
- Q: Do all project types require an annual assessment?

- ○ A: APR is based on funding source, so not all projects in HMIS are required to complete the APR.

  Per the Sage CoC APR Guidebook: HUD requires Continuum of Care (CoC) recipients to submit Annual Performance Reports (APR)within 90 days from the end of their grant operating year.

  For more information on assessments please refer to the following knowledge base article, Status and Annual Assessments

- Q: When will the next Data Management Performance meeting be held?
  - ○ A: The next Data Management Performance meeting will be held in November. We will announce the details in our next User Meeting on November 1st.

Future Meeting Information

November 2023 HMIS User Meeting Webinar

- Date: Wednesday, November 1st, 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.