

Welcome!

October 2023
OC HMIS User Meeting

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



Agenda

1. FY 2024 HMIS Data Standards Release
2. Project Set Up Form
3. Annual Performance Report
 - a. Q6a Data Quality: Personally, Identifiable Information (PII)
 - b. Q6c Data Quality: Income and Housing Data Quality
4. Head of Household Errors
5. HMIS Account Update Form
6. Logging into OC Clarity
7. Project Performance Report
8. Training: HMIS Data Analytics On-Demand Course
9. Q&A
10. Office Hours

FY 2024 HMIS Data Standards

HUD has released the [FY2024 HMIS Data Standards Manual](#). These changes were implemented in HMIS as of **October 1st**, and include updates for the following screens/projects:

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

Revision History

Version	Revision
FY 2024 V1	<p>2.02 Project Information</p> <ul style="list-style-type: none">● Remove "Emergency Shelter Tracking Method"● Add "Night-by-Night" to existing emergency shelter response option ("1").● Add Response "0" – "Emergency Shelter Entry Exit" response option● Add Rapid Re-housing subtype field● Add "RRH: Services Only" subtype to affiliation field● Remove HMIS Participating Project field from this element, create new element for HMIS Participation Status.● Change "domestic violence victim" to "survivor of domestic violence" in target population <p>2.06 Funding Sources</p> <ul style="list-style-type: none">● Remove "HUD: CoC – Joint Component RRH/PSH"● Add "HUD - ESG RUSH"● Add "HUD: Unsheltered Special NOFO"● Add "HUD: Rural Special NOFO"● Remove "Rural Housing Stability Assistance Program" <p>2.07 Bed and Unit Inventory</p> <ul style="list-style-type: none">● Change Project Type Applicability for RRH to only PH-Rapid Re-housing (RRH: Housing with or without services) subtype <p>2.08 HMIS Participation Status</p> <ul style="list-style-type: none">● New Element for tracking HMIS participation – removing HMIS participation field from project information PDDE.● Added comparable database participating <p>2.09 CE Participation Status</p> <ul style="list-style-type: none">● Add PDDE to identify projects acting as "access points" and projects that accept referrals from CE including participation status dates. <p>3.01 Name</p> <ul style="list-style-type: none">● Data collection instruction change – Client may provide preferred name. "Legal name" not required unless required by the funder. <p>3.02 Social Security Number</p> <ul style="list-style-type: none">● Data Collection instruction change – HUD CoC and ESG, and SAMHSA PATH Programs require only last four digits of SSN to be required. <p>3.04 Race and Ethnicity</p> <ul style="list-style-type: none">● Combine Race and Ethnicity into single data element. (Eliminate 3.05 data element)● Add response option for "Middle Eastern or North African" and modified "Hispanic/Latina/e/o" response option. Added text box to provide additional detail.

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

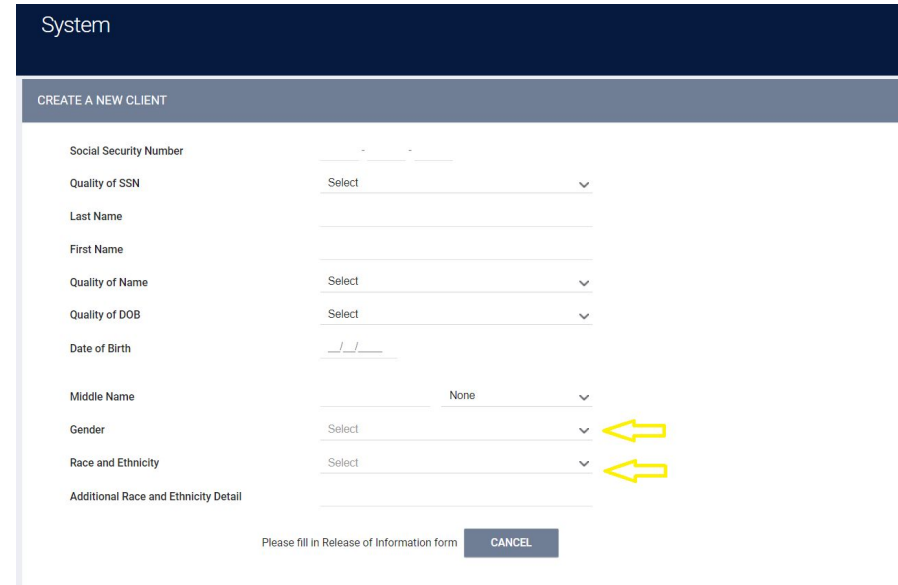
Service providers will need to determine the appropriate time to discuss these fields, likely during an annual assessment.

System

CREATE A NEW CLIENT

Social Security Number	- - -
Quality of SSN	Select
Last Name	
First Name	
Quality of Name	Select
Quality of DOB	Select
Date of Birth	/ /
Middle Name	None
Gender	Select
Race and Ethnicity	Select
Additional Race and Ethnicity Detail	

Please fill in Release of Information form

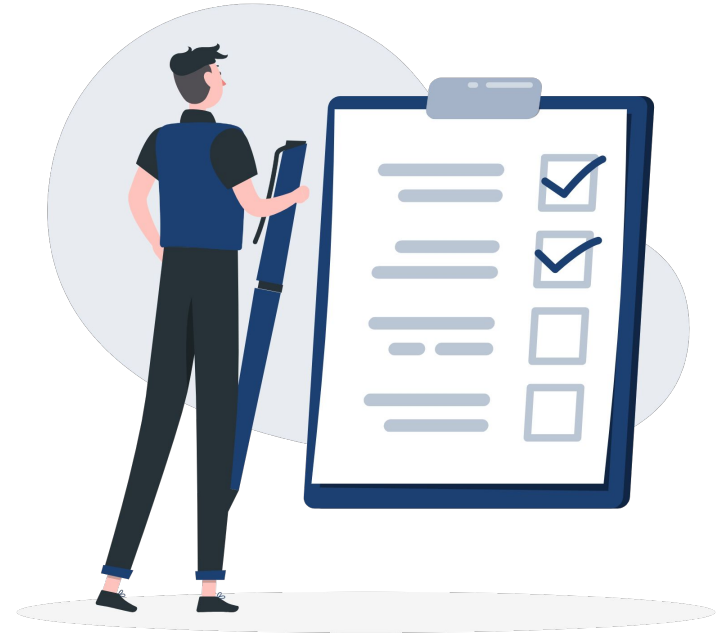


FY 2024 HMIS Data Standards - Form Updates

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



Project Setup Form

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

1. Emergency shelter project type is now:
 - a. Emergency Shelter - Entry Exit
 - b. Emergency - Night-by-Night.

2. PH – Rapid Re-Housing includes a sub type
 - a. RRH: Services Only
 - b. 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.

The screenshot displays two dropdown menus from a software interface. The first menu, labeled 'Project Type *', is open and shows a list of options: 'PH - Rapid Re-Housing' (selected), 'Day Shelter', 'Emergency Shelter - Entry Exit', 'Emergency Shelter - Night by Night', 'Homeless Prevention', 'Other', 'PH - Housing Only', 'PH - Housing with Services (no disability required)', 'PH - Permanent Supportive Housing', 'PH - Rapid Re-Housing' (highlighted with an orange box), 'Safe Haven', 'Services Only', 'Street Outreach', and 'Transitional Housing'. The second menu, labeled 'Identify RRH subtype *', is closed and shows the selected option 'RRH: Housing with or without services'. Below this menu is a note: 'Please see [pages 29-30 of the FY2024 HMIS Data Standards](#) to determine the correct program type for your program.'

Project Setup Form (continued)

- **Does this project conducts CE access activities?**
(Please review [page 43 - 45 of the FY2024 HMIS Data Standards](#) for additional details)
- A **Yes** response is indicating this project accepts referrals and placements from Coordinated Entry

Project is a Coordinated Entry Access Point *

Yes

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

Provided by CE Project *

Homelessness Prevention Assessment, Screening, and/or Referral

Shelter Assessment, Screening, and/or Referral

Housing Assessment, Screening, and/or Referral

Project Receives CE Referrals *

Yes

A Yes response is indicating this project accepts referrals and placements from CE.

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.

Q6a. Data Quality: Personally Identifiable Information					
Program Applicability: All Projects					
Data Element	Client Doesn't Know/Prefer Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.01)	0	0	0	0	0.00%
Social Security Number (3.02)	2	1	0	3	15.79%
Date of Birth (3.03)	0	0	0	0	0.00%
Race/Ethnicity (3.04)	0	2		2	10.53%
Gender (3.06)	0	0		0	0.00%
Overall Score				3	15.79%

Q6a Data Quality: Personally Identifiable Information (PII)

- 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.

Q6a. Data Quality: Personally Identifiable Information

Program Applicability: All Projects

Data Element	Client Doesn't Know/Refers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.01)	0	0	0	0	0.00%
Social Security Number (3.02)	2	1	0	3	15.79%
Date of Birth (3.03)	0	0	0	0	0.00%
Race/Ethnicity (3.04)	0	2		2	10.53%
Gender (3.06)	0	0		0	0.00%
Overall Score				3	15.79%

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

Q6c. Data Quality: Income and Housing Data Quality					
Program Applicability: All Projects					
Data Element	Client Doesn't Know/Prefer Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Destination (3.12)	14	50		64	11.90%
Income and Sources (4.02) at Start	68	86	4	158	9.63%
Income and Sources (4.02) at Annual Assessment	0	672	0	672	74.75%
Income and Sources (4.02) at Exit	16	35	1	52	11.71%

Q6c Data Quality: Income and Housing Data Quality

"Information Missing" Errors (cont.)

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

Q6c. Data Quality: Income and Housing Data Quality					
Program Applicability: All Projects					
Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Destination (3.12)	14	50		64	11.90%
Income and Sources (4.02) at Start	68	86	4	158	9.63%
Income and Sources (4.02) at Annual Assessment	0	672	0	672	74.75%
Income and Sources (4.02) at Exit	16	35	1	52	11.71%

Q6c Data Quality: Income and Housing Data Quality

APR Preparation Dashboard

This was designed to find common errors with enrollments which might cause problems when submitting the APRs.

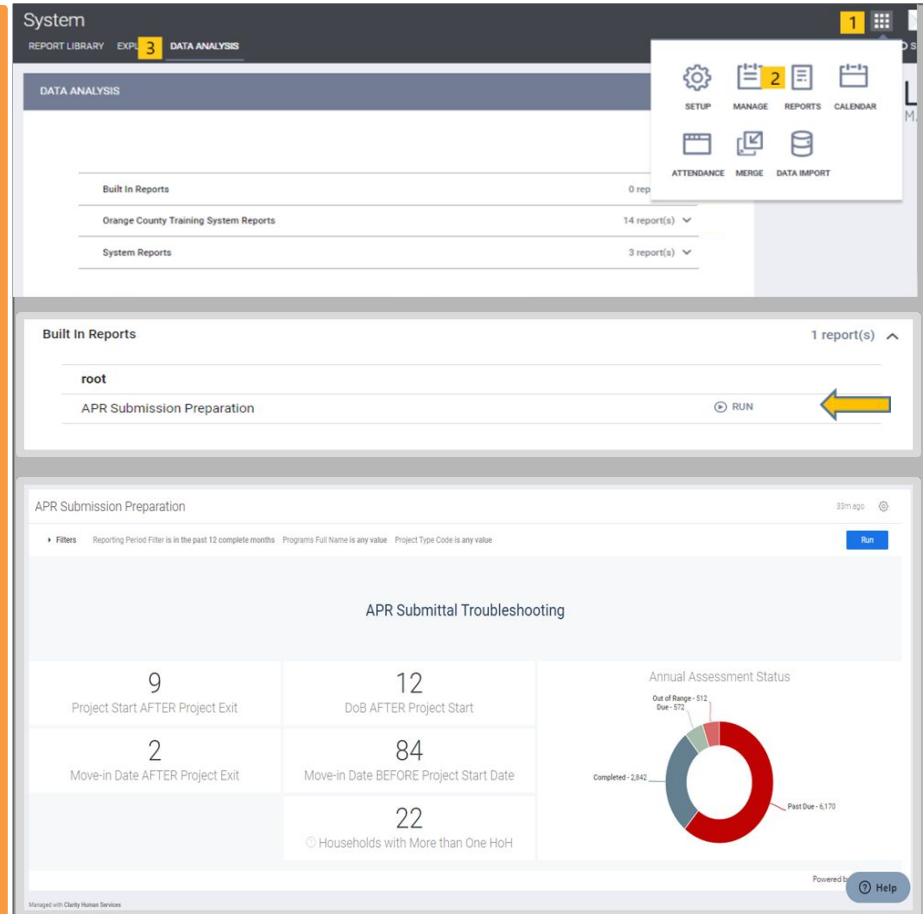
To Access: Reports > Data Analysis > Built In Reports > APR Preparation Dashboard

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

- Contains markers for “Completed”, “Completed out of range”, “Due in 30-60 days”, “Past Due”, and “Due”.



Head of Household Errors

Report Pathway: Reports > Data Analysis > [Built In Reports folder](#)

Common errors:

1. A Head of Household (HoH) leaves the program and a new was not assigned
 - a. Assign a new HoH
 - b. All the other members' Relationship to Head of Household should be corrected to reflect each individual's relationship to the newly designated HoH (including the client leaving the project)
2. A minor was assigned HoH
 - a. Group Enrollment: Re-assign to appropriate HoH
 - b. Individual Enrollment: Program merge will need to occur

LSA Data Cleanup: Head of Household Data

Reporting Period Filter: CoC Code: Continuum Project:

Program Enrollment HH with no HoH									
Program Enrollment HH ID	Agency Name	Program Name	Program Type	Count of Clients in Household	Head of Household Count	Household Members	Household Member Unique Identifiers		
1 2267	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		407580007, CA3700892		
2 2297	OC Training Agency	HOPWA Funded Day Shelter Training Program	Transitional Housing	2	0		121940003, 078480549		
3 3462	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		79805171E, CAC276954		
4 3624	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		3A428FAC, 0711146AA		
5 4780	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		07A048F01, EBF4E4F4C		
6 5373	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		486257840, 0882A520		
7 7703	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		188820706, 9F118A7E7		
8 13219	OC Training Agency	CoC Funded Transitional Housing Training Project	Transitional Housing	2	0		47F48A650, F15810206		
9 997	OC Training Agency	Non-Federally Funded Transitional Housing	Transitional Housing	1	0		F13706687		

Head of Household Less Than 16 Yrs Old at Project Start									
Look Excludes RHY and YHPD Funded Programs									
Unique Identifier	Head of Household Current Age	Age at Project Start	Date of Birth Date	Program Enrollment Household ID	Program Enrollment Head of Household?	Enrolling Agency Name	Enrolling Program		
1 ASE871FAC	0	0	2022-12-12	15030	Yes	OC Training Agency	CoC Funded		
2 E9C11A4F1	13	13	2010-06-15	14596	Yes	OC Training Agency	CoC Funded		
3 9888164F	13	13	2010-02-04	13727	Yes	OC Training Agency	ES3 Funded		
4 9C0F4E2E8	3	3	2020-02-02	13470	Yes	OC Training Agency	CoC Funded		
5 1087F0C3C	15	15	2007-11-27	11414	Yes	OC Training Agency	CoC Funded		
6 23A7EE700	13	12	2010-02-02	10763	Yes	OC Training Agency	Non-Federal		
7 3E78C3B29	0	-1	2023-01-01	13178	Yes	OC Training Agency	CoC Funded		
8 E42378208	13	12	2010-05-15	12842	Yes	OC Training Agency	ES3 Funded		
9 80E381F23	13	11	2010-11-20	12690	Yes	OC Training Agency	HOPWA Funded		
10 7E7F58C65	13	12	2010-04-03	9521	Yes	OC Training Agency	CoC Funded		
11 36878A72D	12	10	2011-10-01	9834	Yes	OC Training Agency	CoC Funded		
12 A0B930C0C	3	2	2020-01-21	9070	Yes	OC Training Agency	CoC Funded		
13 9C5FA82E2	4	2	2019-08-22	8053	Yes	OC Training Agency	Non-Federal		
14 79500039D	12	11	2011-01-01	6742	Yes	OC Training Agency	CoC Funded		
15 045863799	10	8	2013-03-20	5641	Yes	OC Training Agency	ES3 Funded		

Head of Household < 16 Years Old at Project Start and Only Household Member									
Look Excludes RHY and YHPD Funded Programs									
Unique Identifier	Head of Household Current Age	Age at Project Start	Date of Birth Date	Program Enrollment Household ID	Program Enrollment Head of Household?	Enrolling Agency Name	Enrolling Program		
1 10C81AA21	13	11	2010-01-01	6429	Yes	OC Training Agency			
2 3E78C3B29	0	-1	2023-01-01	13178	Yes	OC Training Agency			
3 A315074C9	13	11	2010-01-01	7112	Yes	OC Training Agency			
4 3E230B482	5	1	2018-01-01	551	Yes	TRAINING - Grandma's House of Hope			
5 ASE871FAC	0	0	2022-12-12	15030	Yes	OC Training Agency			
6 A8E84D068	3	1	2020-01-01	2771	No	OC Training Agency			
7 8D767CC49	7	5	2016-05-29	5847	Yes	OC Training Agency			
8 36878A72D	12	10	2011-10-01	9834	Yes	OC Training Agency			
9 D1F5C0E84	13	10	2010-03-08	3957	No	OC Training Agency			
10 S4797B1A3	16	14	2007-03-27	4951	No	OC Training Agency			
11 A0B930C0C	3	2	2020-01-21	9070	Yes	OC Training Agency			

HMIS Account Update Form

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

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

Please check any of the following additional access roles this user requires:

- Family Coordinated Entry System
- Individual Coordinated Entry System

Follow Up CES Question: What is the user's primary role at your agency? *

- Access Point Staff
- CalAIM Staff
- Case Manager/Housing Navigator for Housing Project
- Data/HMIS Support Staff
- Housing Provider
- Shelter Staff
- Street Outreach Staff
- Other

Logging into Clarity

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.

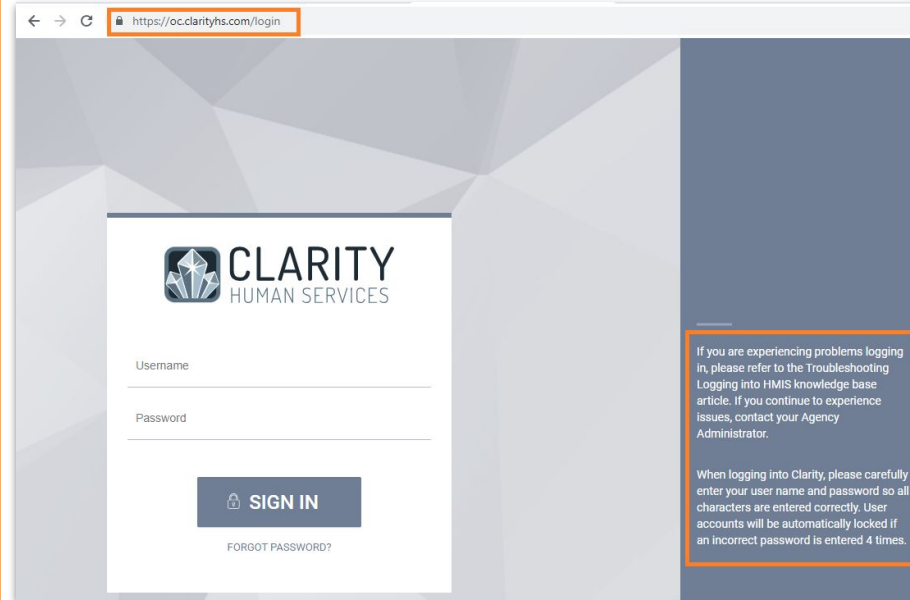
Tip #3 Disabled due to Inactivity

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.

KB: [Troubleshooting Logging into HMIS](#)



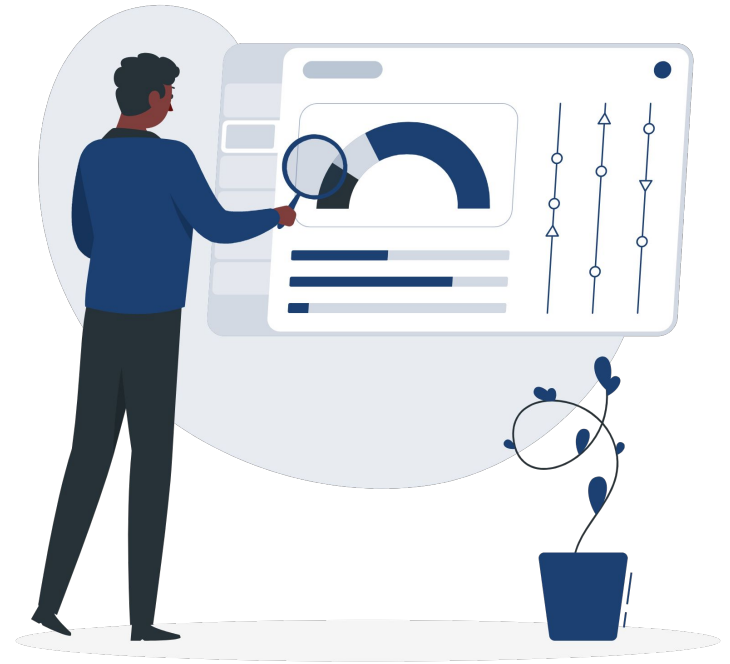
PSH/OPH Project Performance Report

The Project Performance Report for Permanent Supportive Housing and Other Permanent Housing projects will be published next Thursday.

Rapid Re-Housing draft data will be uploaded into DropBox next week.

The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule

Current and past PPRs can be found at on the [Orange County HMIS](#) website: OCHMIS Website > Reports > [Project Performance Reports](#)

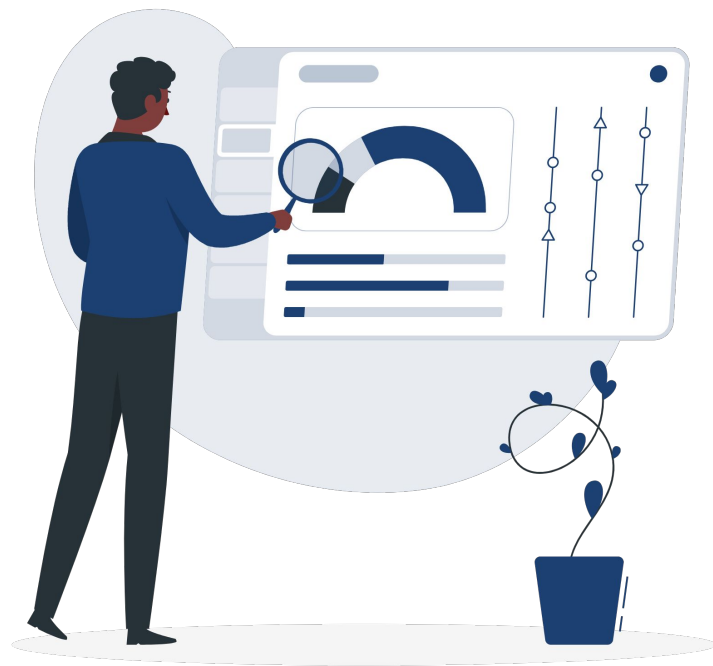


HMIS Data Analytics On-Demand Course

Cohort Ten – Starting October 16, 2023

The goal of this immersive course is to provide a conceptual and practical framework for ad hoc reporting utilizing Homeless Management Information System (HMIS) data. This self-paced course is open to anyone in your community who is interested in analyzing, interpreting, and communicating HMIS data. This is an introductory level course and might be a good fit for newer members of your HMIS team or someone looking to brush up on their data skills. Participants are not expected to have high-level technical or statistical skills; only basic knowledge of the following is needed:

- 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



Q&A

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

Thank you
Have a great day!

Next User Meeting: Nov 1st