

OC HMIS User Meeting Webinar Minutes 11/01/23

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Agenda Items

User Recertifications

The [2023 HMIS Part 2 Recertification](#) is now available.

- Users with Read Only accounts or accounts created on or after June 1st are excluded from this requirement.
- Agency Administrators must submit the [2023 HMIS Part 2 Recertification Form](#) for their users.
 - Agency Admins can access the Active User report by follow this pathway: Data Analysis > User Management > Agency Active Users
- Users that do not complete the recertification by January 12th will have their accounts locked until the Recertification is completed. |

Deleting Program Enrollments and Services

Deleting Program Enrollments: In some cases, a client may have duplicate enrollments due to a client profile merge or data entry error. The user will need to reach out to their Agency Administrator to assist with deleting the duplicate program enrollment.

- Step 1: Search the client record, and select the Program tab
- Step 2: Once on the Program tab, scroll to the Program History section, you should see the program(s) the client is enrolled in
- Step 3: Hover your mouse next to the Program name of the one you wish to delete, you should see a Trash Can and Edit icon appear
- Step 4: Select the Trash Can icon and Click OK on the pop-up window

Deleting Services: If you do not see the trash icon when hovering over the program enrollment, it is most likely there are services attached to the enrollment. You will first need to delete the services.

- Step 1: Navigate to the History tab, and hover to the left of the service you wish to delete until the Trash icon appears and then select it
- Step 2: After you click on the Trash icon you will get the following message, click OK and the service will be deleted
- Step 3: Proceed with deleting the program enrollment

Referral and Community Queue Field Updates

Release Schedule:

- All Training Sites: Monday, Oct. 30, 2023
- All Production Sites: Monday, Nov. 13, 2023

Referral Date: Users who have access to create a referral, can now edit referral dates.

- Referrals Future Date will display the scheduled date. The referral is “inactive” until the scheduled date.
- Matchmakers are able to edit the Reassigned Date of a referral

Referral Status: The update allows the user to set a referral status to be applied to a past or future date.

- Users need to click the edit icon next to the Current Status and the additional field will appear for data entry.

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Community Queue Date Filter: Allows users to search for referrals on the queue from the selected date and earlier.

- For example, if a user sets the Date to November 1st, the search results will include referrals sent to the queue on or before Nov. 1st that had not been reassigned or otherwise removed from the queue as of Nov. 1st

CES Support Tickets

For the Coordinated Entry System, there will be times when corrections will need to be made. The CES lead has asked if a program enrollment needs to be deleted that you contact the Office of Care Coordination at coordinatedentry@ocgov.com

For other issues such as linking a referral to a program or any other CES questions can still be sent in to the HMIS Help Desk.

2023 HMIS Agency Audit Overview

The HMIS Helpdesk Team is currently conducting the last round of audits for 2023.

- If your agency has not been contacted for your audit we will be reaching out to you 2 weeks before the audit to schedule a meeting.
 - [2023 Agency Audit Form](#)
- Due to the upcoming holidays, it is important to confirm a date for your agency's audit when you receive the scheduling email.

BitFocus Reports Update

The HMIS Help Desk would like to thank all of the HMIS-participating agencies for their patience while we work with our vendor, Bitfocus, to resolve these issues.

Over the past couple weeks, many users have experienced issues with canned and custom Looker reports in Clarity.

If your agency is experiencing a reporting issue not included in the [HMIS Helpdesk newsletter email](#), or if your agency is continuing to experience an issue that is listed in the newsletter as resolved, please have your HMIS Agency Admin submit a ticket to the [HMIS Help Desk](#).

Data Refresh Rate

The “Data Refresh Rate” is the rate at which data entered into Clarity appear in Looker reports.

- Two (2) hours is the typical “Data Refresh Rate”, but it can be affected by certain data or report factors.
- Data such as client files are updated and refreshed at midnight so if a file is added today it will be recorded in your report tomorrow. This is good to remember when requesting [Client Record Requests](#).
- Please keep in mind that data entered before the “Data Refresh Rate” may not appear in your reports.
- Please refer to the [Data Refresh Rate](#) Bitfocus KB for more information or [submit a ticket](#) to the HMIS Helpdesk with your questions.

2023 Longitudinal Systems Analysis (LSA) Timeline

Important dates to keep in mind for this upcoming [LSA reporting season](#):

Reporting Period: 10/01/22 - 09/30/23

- November 13th: HDX 2.0 officially opens for LSA uploads
- Nov 15th - 30th: HMIS participating agencies support needed for 1st Round of Corrections & Warnings
- Dec 11th - 22nd: HMIS participating agencies support needed for 2nd round of Warnings Flags
- January 5th: HMIS Team prepares for LSA submission

Data Quality Report Cards

We will be publishing 2023 Q3 Data Quality Report Cards shortly. Data Quality Report Cards will be looking at the following:

- Data Completeness - Data Completeness refers to the degree to which all required data is known, valid and documented in HMIS. A data element is considered to have a valid response when it is in accordance with the HUD Data Standards, and it is different from Client Doesn’t Know, Client Refused, and Data Not Collected.
- Data Accuracy - Data accuracy refers to the degree to which data entered in HMIS represents the real information on the clients that are served in the projects contributing data to the system.
- Data Timeliness - Data Timeliness refers to the degree to which the data is collected in HMIS and available when it is needed.

Review the previous quarters’ reports [here](#) on our website!

Project Performance Report

The Rapid Re-Housing Project Performance Report will be published next Thursday. Please review the [Project Performance Report Overview](#) for applicable goals.

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Keep an eye out for the Transitional Housing 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

Holiday

The HMIS Help Desk will be closed on Thursday and Friday, November 23rd and 24th in observance of Thanksgiving. We will be back in the office to assist you on Monday, November 27th.

Q&A

User Recertifications

- Q: What was the date to have users recertified by?
 - A: Users can start today and the due date for this task is Jan 12th.
- Q: Will agencies using HMIS-comparable databases also be going through this process?
 - A: The HMIS recertification would be for only agencies that participate in OC Clarity HMIS.

Referral and Community Queue Field Updates

- Q: Regarding the Referral Date, can you please give an example of when this option would be useful?
 - A: An example of a case when a Referral Date needs to be updated is if a referral was denied by accident. The HMIS Helpdesk Team would work with the HMIS Agency Admin and the CES lead to determine if this referral needs to be recreated. When recreating the referral, we want the referral date to reflect the historical referral date and original match date. In the past when the HMIS Helpdesk would make this correction it would be default to the date the correction was processed. This new functionality allows us to change the date to reflect the historical referral and match dates.

Future Meeting Information

December 2023 HMIS User Meeting Webinar

- Date: Wednesday, December 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.