Welcome!

November 2023

OC HMIS User Meeting

Please enter your agency name in the chat box

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Agenda

1. User Recertifications
2. Deleting Enrollment and Services
3. Referral and Community Queue Field Updates
4. CES Support Tickets
5. Audit Overview
6. Reports Updates
7. Data Refresh Rate
8. LSA Timeline
9. Data Quality Report Cards
10. Project Performance Reports
11. Holiday
12. Q&A
13. Office Hours

HMIS Part 2 Recertification

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.
- Users that do not complete the recertification by January 12th will have their accounts locked until the Recertification is completed.

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Deleting Program Enrollment

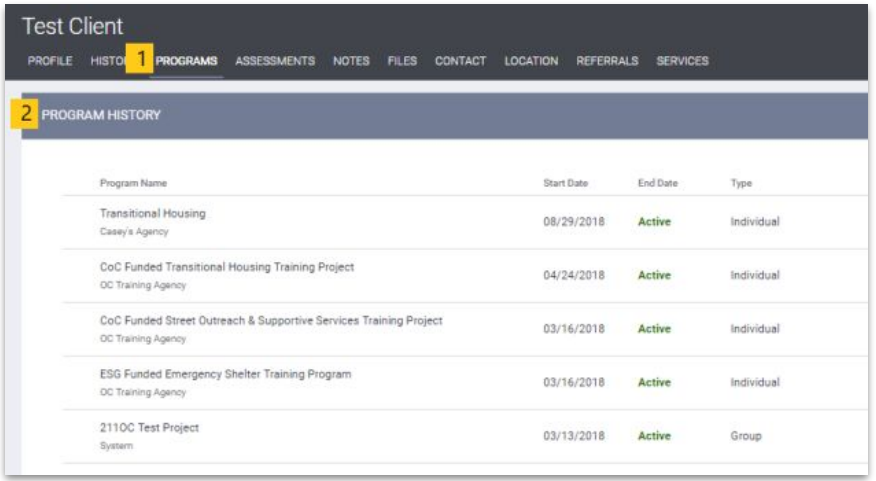
Deleting Program Enrollment: In some cases, a client may have duplicate enrollments due to a client profile merge or data entry error. The user will need to reach out to their Agency Administrator to assist with deleting the duplicate program enrollment.

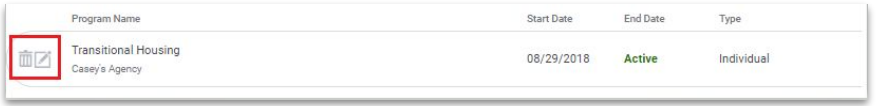
Step 1: Search the client record, and select the Program tab

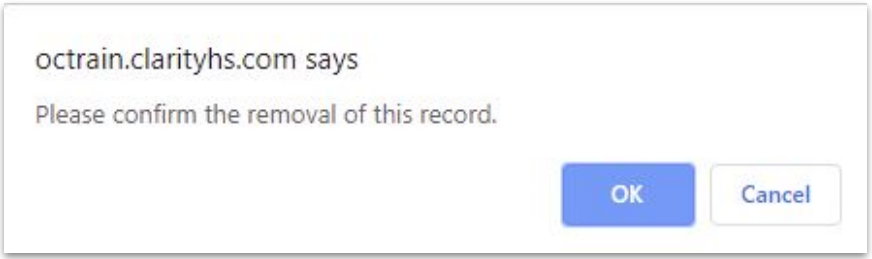
Step 2: Once on the Program tab, scroll to the Program History section, you should see the program(s) the client is enrolled in.

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







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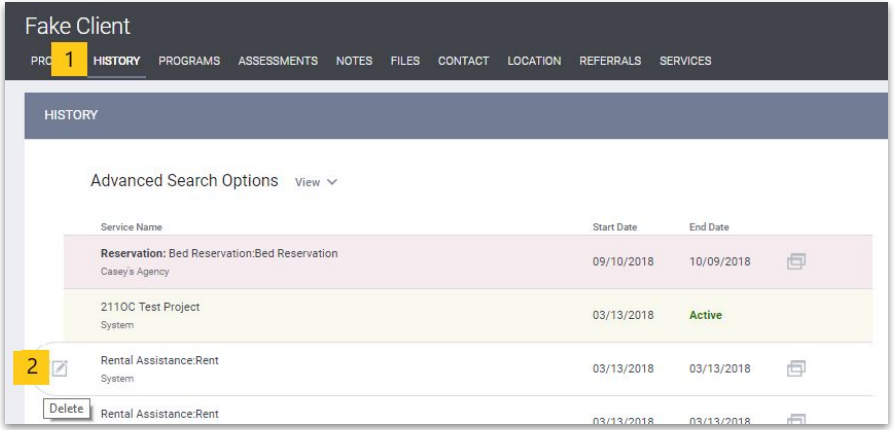
Deleting Services

If you do not see the trash icon when hovering over the program enrollment, it is mostly 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



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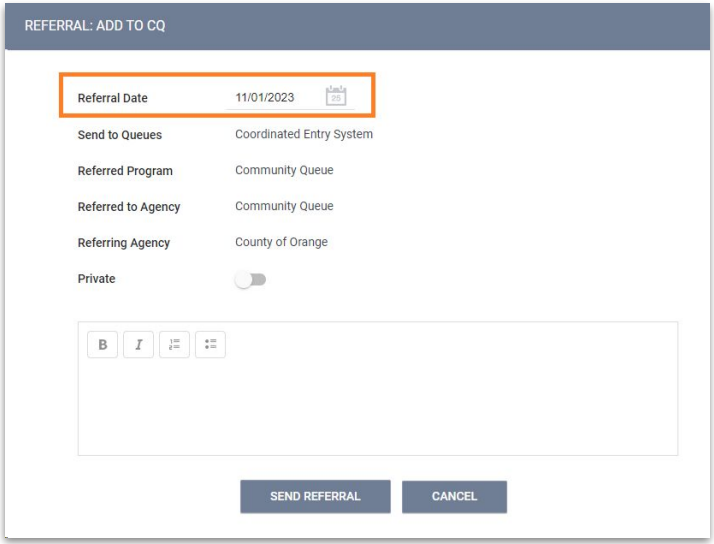
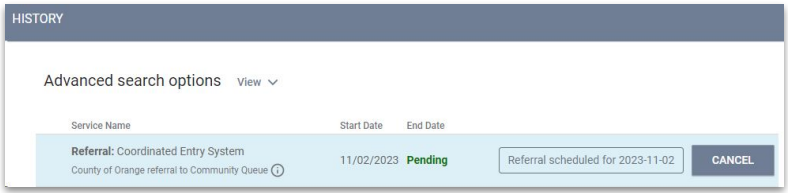
Referral Date

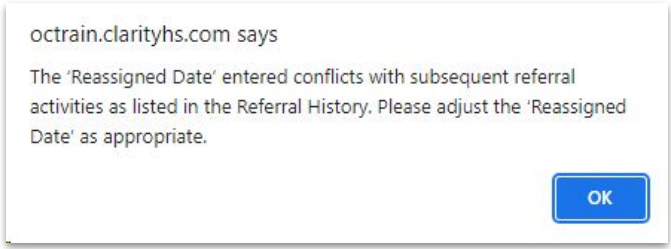
Release Schedule:
All Training Sites: Monday, Oct. 30, 2023
All Production Sites: Monday, Nov. 13, 2023

- 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







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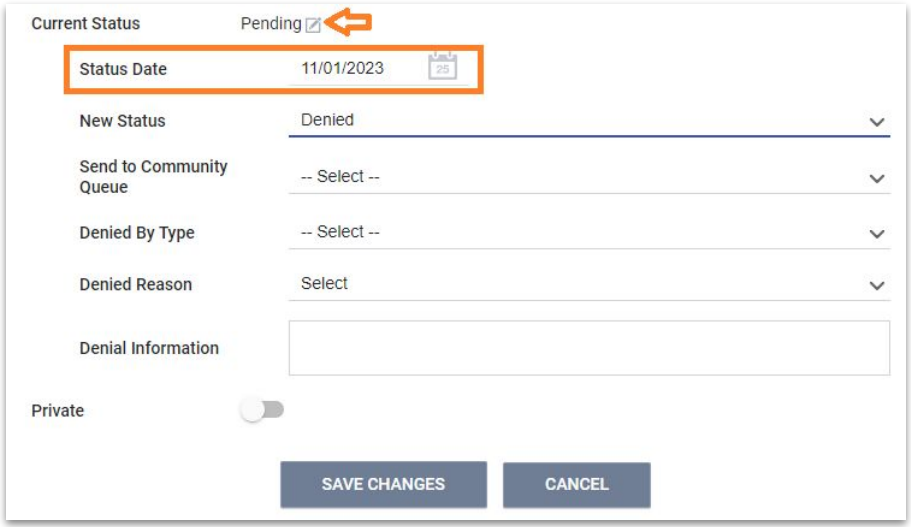
Referral Status

- 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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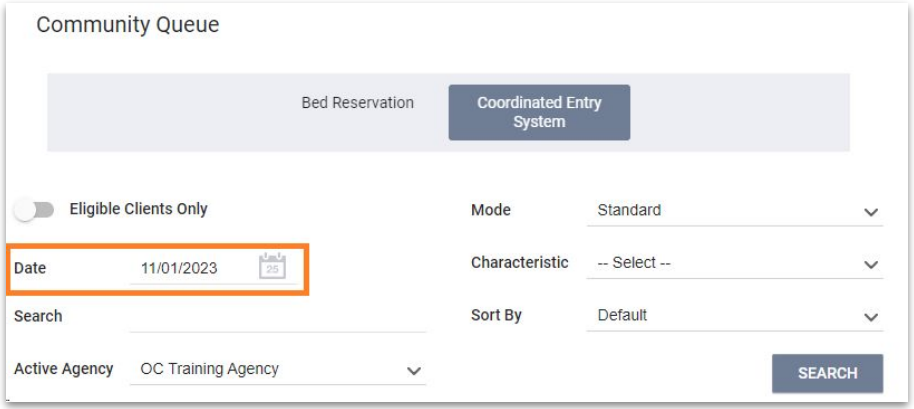
Community Queue Date Filter

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



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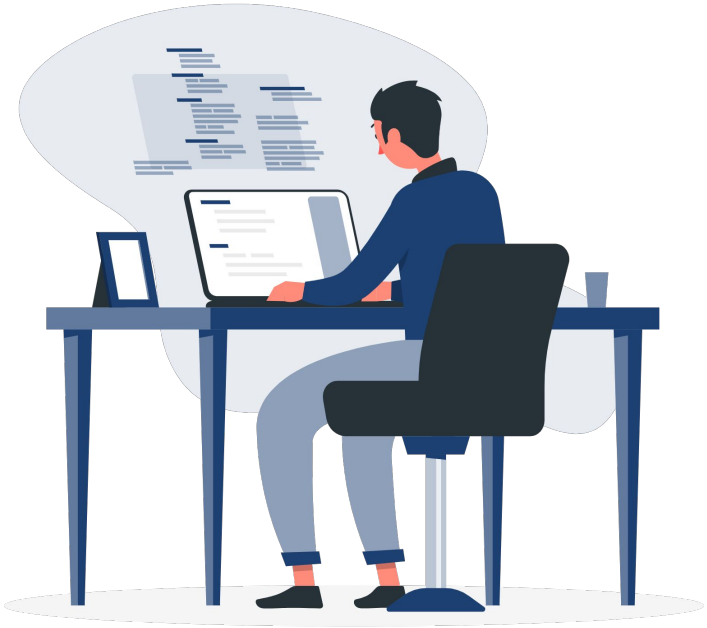
CES Support Tickets

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 can still be sent in to the HMIS Help Desk.



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2023 HMIS Agency Audits

The HMIS Helpdesk Team is currently conducting the last 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.

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Reports Updates

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.

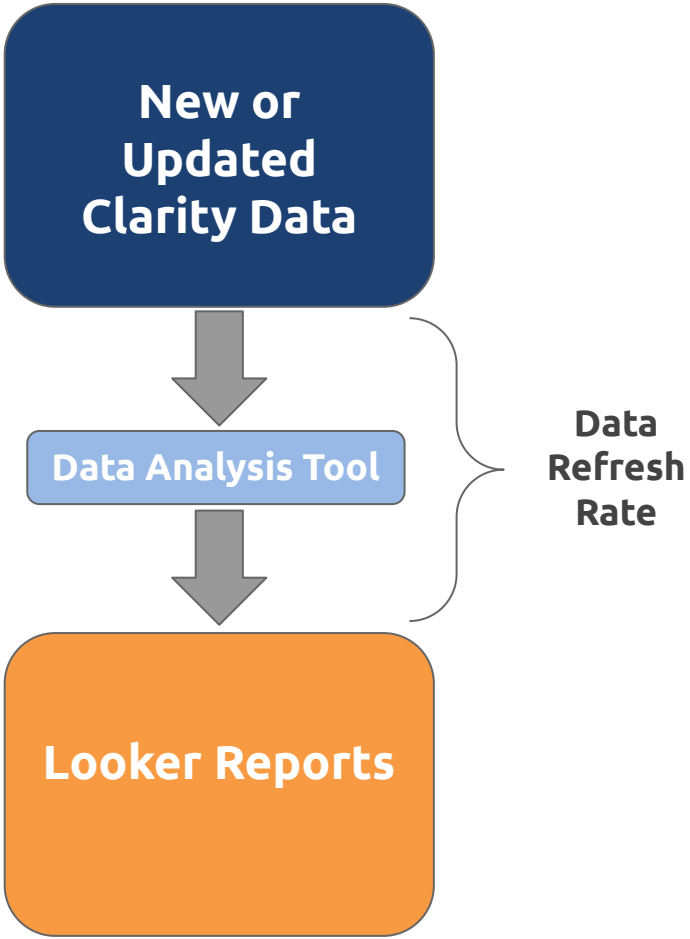
Over the past couple weeks, many users have experienced issues with canned and custom Looker reports in Clarity.

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.

- Canned Reports available in the Report Library and Client screens that include fields impacted by the release of the 2024 Data Standards are in the process of being updated.
  - [GNRL] reports are expected to be updated by the end of the month. The remaining reports are being prioritized by BitFocus.
- Scheduled reports not producing data are being escalated to Bitfocus on a case-by-case basis. Their development team is currently investigating to identify a solution. Please submit a ticket if you're encountering an issue with your agency's scheduled reports.
- Missing information/participants on reports:
  - The data refresh issue causing some data to be missing from reports was identified and a solution was released 10/17. Reports that were affected by this issue:
    - CES Community Queues
    - Households Waiting for Bed Reservation
    - Bed Reservation Available Housing Opportunities
  - Data entered into Clarity may not populate in custom reports immediately. In most cases data should be updated in reports within 2 hours. Users can also clear the cache of the report to see recently added data. To do this, click on the gear icon and select "Clear cache and refresh".
  - Data entry errors will also prevent participants or opportunities from appearing on reports. For example, participants may not show up on the CQ reports if they were referred with an assessment that is not the latest assessment or not from the most current enrollment. For bed reservation housing opportunities, a CES component (individual or family) is required to be entered for opportunities to appear on reports.

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.
- 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.



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2023 Longitudinal Systems Analysis (LSA) Timeline

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

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LSA - Data Quality Review

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

Common LSA Errors and Warnings:

- Issues with relationship to Head of Household
- Error with start date, exit date and bed nights
- Overlapping program enrollments
- Bed Inventory
- Utilization
- Length of Stay

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Data Quality Report Cards

Q3 Data Quality Report Card will be published in the next few weeks! 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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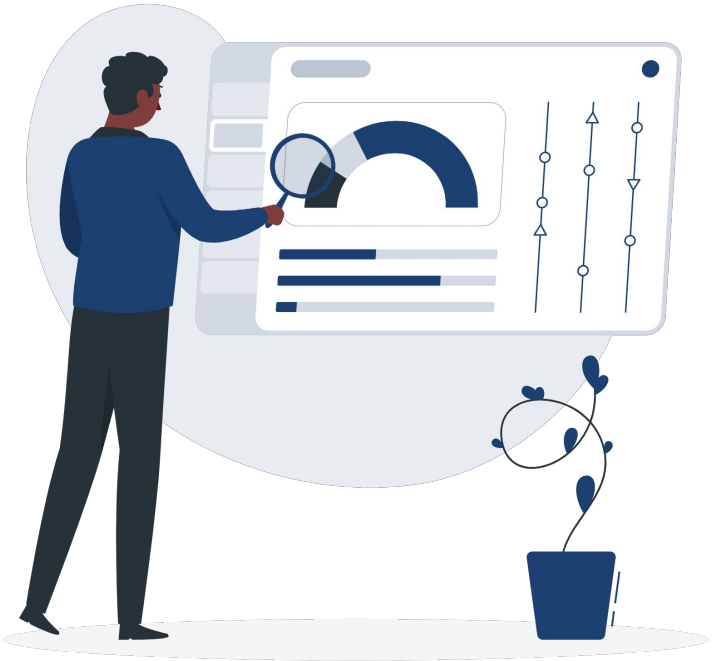
RRH Project Performance Report

The Project Performance Report for Rapid Re-Housing projects will be published next Thursday.

Transitional 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



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Holiday Observed

The HMIS Help Desk will be closed on **Thursday, November 23 and Friday, November 24** in observance of **Thanksgiving.**

We will be back in the office to assist you on Monday, November 27th.

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Q&A

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

Thank you
Have a great day!

Next User Meeting: Dec 6th