

OC HMIS User Meeting Webinar Minutes 12/06/23

Contents

Agenda Items	1
New Staff Update	1
HMIS Client Consent Form	1
Minimum Participation Requirements (MPR) & Agency Audit Reminder	1
HMIS Part 2 Recertification	2
HMIS Support Tickets and Forms	2
Sending Referrals to Bed Reservation	2
HIC PIT - Agency Set Up Review	2
LSA Updates	3
Clarity Report Updates	3
Project Performance Report	3
Holiday	3
Future Meeting Information	4
January 2024 HMIS User Meeting Webinar	4

Agenda Items

New Staff Update

Please welcome Hugo Ambriz as our HMIS Support Specialist!

HMIS Client Consent Form

The HMIS [Consent to Share Protected Personal Information Form](#) has been updated to reflect a list of the currently HMIS-participating agency roster.

Minimum Participation Requirements (MPR) & Agency Audit Reminder

The HMIS Helpdesk Team is still currently conducting the final 2023 Audits and [MPR reviews](#) 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. The review period for the MPR review is the July- September 2023 quarter.

HMIS Part 2 Recertification

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

OC HMIS Monthly User Meeting Minutes

- 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.

HMIS Support Tickets and Forms

HMIS Helpdesk has received an influx of support tickets. The HMIS Team would like to thank you all in advance for your patience as we work to provide support and resolve your ticket.

Things to keep in mind:

- Only Agency Admins should submit tickets to the HMIS Helpdesk
- Provide all necessary details for the HMIS Helpdesk Team to support with your ticket
 - Report name, filters, client ids
- To request for a status update, please reply to the ticket you created

Sending Referrals to Bed Reservation

It has come to the CES Leads attention that direct referrals are being made to the emergency shelters that participate in the Bed Reservation System. The programs are set up in such a way that we are unable to restrict or prevent these direct referrals because the programs must be made public for reporting and eligibility settings to function properly.

- The CES Leads will delete any direct referrals because they have not gone through the referral workflow for matching.
- If your staff needs a refresher on this topic please review the [Adding Households to the Bed Reservation Community Queue KB](#)

HIC PIT - Agency Set Up Review

- HUD is requiring final bed inventories to be updated in HMIS prior to HIC/Sheltered PIT submission.
- Use the Agency Set-Up Review Dashboard to review and ensure accuracy for the following data
 - Program Descriptor, Funding Sources, and Bed Inventory
- For more information on this report, refer to our [Agency Set Up Review Dashboard KB Article](#).
- We will also be uploading copies of this dashboard to your agency Dropbox for your review.
- If you notice any information that is outdated or inaccurate while reviewing the dashboard, please submit an HMIS ticket so that we can update the information in HMIS.

OC HMIS Monthly User Meeting Minutes

LSA Updates

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

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

- Dec 11th - 22nd: HMIS participating agencies support needed for 2nd round of Warnings Flags
- January 5th: HMIS Team prepares for LSA submission

Thank you to the OC HMIS community for your on-going support with the LSA error and warning flags. Please feel free to review the [LSA Common Flags Library](#) to support with your agency's error/warning flags review.

Clarity Report Updates

The HMIS Help Desk would like to thank you for your continued patience while we work with Bitfocus, to resolve report issues.

- Canned reports in the Report Library continue to be updated, with more than 30 completed to date. This includes the HUD reports and Client level reports such as the [CLNT-125] Client Summary and the [CLNT-127] Homeless Status Timeline
- You can find future updates and release dates in the Bitfocus [Report Library](#) Help Center under "Pentaho Release Notes - Current Year".
- Any Custom reports are updated on a case-by-case basis.

If your agency is experiencing any reporting issues, please have your HMIS Agency Admin submit a ticket to the [HMIS Help Desk](#).

Project Performance Report

The Transitional Housing [Project Performance Report](#) will be published next Thursday! The next Project Performance Report is the Emergency Shelter to please be on the lookout for the draft data email in the next coming 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.

The Data and Performance Management Meeting will resume in January and will be held quarterly to review the project performance report.

Holiday

We are closed on Monday, December 25th, Tuesday, December 26th and Monday, January 1st in observance of Christmas and New Years. We will be back in the office to assist you on the following business days.

OC HMIS Monthly User Meeting Minutes

Q&A

Audit Reminder

- Q: For an audit, will you email us on the Audit info? Date / Time, etc
 - A: Yes, an email will be sent to the HMIS Agency Admin (AA) to coordinate a meeting time. The email will include agreement forms and a link to the audit form to be completed by the AA.

HMIS Part 2 Recertification

- Q: Is there a link we can follow for the recertification?
 - A: Yes, here's a link to the [HMIS Part 2 Recertification](#) that includes steps to complete the task.
- Q: How to add the 3rd household member to the program enrollment for the Recertification Test?
 - A: Please refer to the [Enrolling Additional Household Members](#) knowledge base article regarding enrolling the client into the Head of Household's program enrollment.
 - Here are some additional articles that are useful for this section of the test.
 - [Understanding Individual Enrollments and Group Enrollments](#)
 - [Checking for Households that are Enrolled as Individuals and Must be Merge](#)

Sending Referrals to Bed Reservation

- Q: How are access points making direct referrals to the Shelters? Just to get clarification on what they should not be doing.
 - A: The projects that are set up with eligibility settings that resulted with the projects being visible on the screen before sending the participants to the [Bed Reservation Queue](#).

HIC PIT - Agency Set Up Review

- Q: How do we make corrections to agency setups? Is that a ticket?
 - A: Yes, if you notice the information for your agency's project is not accurate please submit an HMIS Helpdesk ticket so the HMIS Helpdesk Team can support with the updates.

Future Meeting Information

January 2024 HMIS User Meeting Webinar

- Date: Wednesday, January 3rd, 2024
- 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.