Welcome!

December 2023
OC HMIS User Meeting

Please enter your agency name in the chat box

Agenda

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Staff Update

Please welcome Hugo Ambriz
as our HMIS Support Specialist!

HMIS Consent to Share Protected Personal Information Form

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

2023 HMIS Agency Audits & Minimum Participation Requirements Reviews

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 Minimum Participation Requirements (MPR) review is the July- September 2023 quarter.

Graphic by: https://storyset.com/online

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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.

HMIS Helpdesk Tickets

HMIS Helpdesk has received an influx of support ticket. 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

Clarity Report Updates

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

- Canned reports in the Report Library continue to be updated, with over 30 completed to date.
- Future updates and release dates can be found in the Bitfocus Report Library Help Center under "Pentaho Release Notes - Current Year".
- Custom reports are being 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.

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 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

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment   History   Provide Services   Events   **Assessments**   Notes   Files   Forms   ✕ Exit

PROGRAM ELIGIBILITY DETERMINATION

Bed Reservation

REFER DIRECTLY TO COMMUNITY QUEUE(S)

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
  - Bed Inventory
  - Funding Sources
  - Program Descriptor

- To access, go to **Reports > Data Analysis > Orange County Clarity System Reports > Agency Management > Agency Set-Up Review**

REPORT LIBRARY	EXPLORE	DATA ANALYSIS		
Built In Reports				11 report(s) ⌄
Orange County Clarity System Reports				139 report(s) ⌃
Home				
Annual Assessment Due				⊙ RUN
Clients with Verbal Consent ROI Records				⊙ RUN
County Monthly Emergency Shelter Report: Entry/Exit Projects				⊙ RUN
County Monthly Emergency Shelter Report: Night-by-Night Projects				⊙ RUN
FEMA/NCS Unit Address Data Quality Details				⊙ RUN
FEMA/NCS Unit Address Data Quality Summary				⊙ RUN
HEAP Details Report				⊙ RUN
HEAP Total Served Unduplicated				⊙ RUN
Street Outreach and Emergency Shelter Institutional Data Clean Up				⊙ RUN
Agency Management				
Agency Set-Up Review				⊙ RUN
Minimum Participation Requirements				⊙ RUN
Minimum Participation Requirements - Family CES				⊙ RUN
Minimum Participation Requirements - Individual CES				⊙ RUN
Bed Reservation				
FCES Bed Reservation Available Housing Opportunities				⊙ RUN
FCES Data Entry: Needs Bed Reservation Assistance Service				⊙ RUN
FCES Eligibility Status for Clients on the Bed Reservation CQ				⊙ RUN

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Agency Set-Up Reports - Program Descriptor Data

Program Descriptor Data

Agency Name	Project Name	Project Type Code	Target Population	Geocode	Site Name	Address	City	ZIP Code	State	Housing Type	Is HMIS Participating Project	Operating Start Date	Operating End Date
A Springfield ...	Linda's Test	Emergency S...	Not Applicable	069059	Springfield A...	742 Evergree...	Springfield	92705	CA	Site-based – ...	Yes	2020-10-01	ø
A Springfield ...	Short Term S...	Emergency S...	Persons with...	564545	Springfield A...	742 Evergree...	Springfield	92705	CA	Site-based – ...	No	2018-08-10	ø
A Springfield ...	HOPWA Spri...	PH - Perman...	Persons with...	1111	Springfield A...	742 Evergree...	Springfield	92705	CA	Site-based – ...	Yes	2018-07-31	ø
A Springfield ...	Evergreen Str...	Street Outrea...	Not Applicable	16168461	Springfield A...	742 Evergree...	Springfield	92705	CA	ø	Yes	2018-06-05	ø
A Springfield ...	Springfield P...	PH - Perman...	Not Applicable	554546	Springfield A...	742 Evergree...	Springfield	92705	CA	Tenant-base...	Yes	2018-06-01	ø
A Springfield ...	Springfield R...	Services Only	Not Applicable	063342	Springfield A...	742 Evergree...	Springfield	92705	CA	ø	Yes	2018-05-18	ø
A Springfield ...	Springfield H...	Emergency S...	Not Applicable	063342	Springfield A...	742 Evergree...	Springfield	92705	CA	Site-based – ...	No	2018-05-17	2021-05-20

- This section of the report has various data elements such as the location of your agency's program, project type and operating start date. It is recommended that your agency examines the following data elements regarding your program.

- Operating Start Date is the first day on which a project provided (or will provide) services and/or housing.

Agency Set-Up Reports – Bed Inventory

Bed Inventory

Agency Name	Project Name	Bed Type	Availability	Household Type	Inventory Start Date	Inventory End Date	Total Bed Inventory	Total Unit Inventory	Non-Dedicated Beds	Veteran Beds	Youth Beds	Youth Veteran Beds	Chronically Homeless Beds	Chronically Homeless Youth Beds	Chronically Homeless Veteran Beds
A Springfi...	Springfield...	Ø	Ø	Household...	2019-01-01	Ø	30	15	30	0	0	0	0	0	0
A Springfi...	HOPWA S...	Ø	Ø	Household...	2019-01-01	Ø	30	15	30	0	0	0	0	0	0
A Springfi...	Springfield...	Ø	Ø	Household...	2018-03-22	Ø	27	27	27	0	0	0	0	0	0

- Household Type is the household type (at project entry) served by beds and units in a given inventory record.

- Projects that serve more than one household type must have separate records of inventory for each household type.

- The bed inventory can change throughout the year or as your agency receives more funding. It is important to update your bed inventory in HMIS as needed.
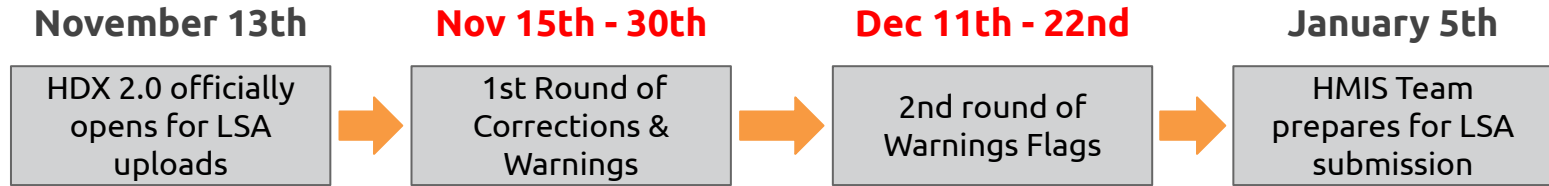
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Agency Set-Up Reports - Funding Sources

Funding Sources

Agency Name	Project Name	Amount	Funding Source	Non Federal Funding Source	Funding Source Start Date	Funding Source End Date	Grant Amount	Grant Identifier	Grant Start Date	Grant End Date
A Springfield Agen...	Linda's Test	$1.00	Local or Other Fu...	City of Santa Ana	2020-10-01	∅	$1.00	Linda 2020	2020-10-01	∅
A Springfield Agen...	Short Term Suppo...	∅	HUD:HOPWA – S...	∅	2018-08-10	∅	$0.00	123456789	2018-08-10	∅
A Springfield Agen...	HOPWA Springfield	∅	HUD:HOPWA – P...	∅	2018-07-31	∅	$0.00	65156	2018-07-31	∅
A Springfield Agen...	Evergreen Street ...	∅	HUD:ESG – Street...	∅	2018-06-05	∅	$0.00	54616	2018-06-05	∅
A Springfield Agen...	Springfield PHS P...	∅	HUD:CoC – Perm...	∅	2018-06-01	∅	$0.00	5454	2018-06-01	∅
A Springfield Agen...	Springfield RRH P...	$450,000.00	Local or Other Fu...	Private	2018-05-18	∅	$450,000.00	15151515	2018-05-18	∅
A Springfield Agen...	Springfield Homel...	∅	VA:Supportive Ser...	∅	2018-05-17	∅	$0.00	010101	2018-05-17	∅

- This section of the report has various data elements regarding the funding for your agency's program.

- There can be multiple funding sources for a program. It is important to keep the funding source end date and grant end date in mind so you can submit new funding to HMIS when they expire.

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2023 Longitudinal Systems Analysis (LSA) Timeline

November 13th

HDX 2.0 officially opens for LSA uploads

→

Nov 15th - 30th

1st Round of Corrections & Warnings

→

Dec 11th - 22nd

2nd round of Warnings Flags

→

January 5th

HMIS Team prepares for LSA submission

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LSA Common Error and Warning Flags

Error Flag 1338: (Project) has X client enrollments that are active during the report period and also overlap with a period of time in which the project was not identified as participating in HMIS. Please see the guidance for handling client data when a project stops participating in HMIS which can be found in the FY 2024 HMIS Data Standards section 2.08 HMIS Participation Status.

Warning Flag 967-970: You reported that zero people were served (active in residence) during the entire report period in this HMIS-participating project, (Project). Please confirm if this is correct and explain any reasons why no people in this household type were served.

Warning Flag 1008, 1014, 1020: (Project) utilization rate for this household type is unusually low. By "low", we mean under 25% utilization. If this is correct, please describe any reasons why the utilization rate for this project was lower than expected for this specific household type.

Project Performance Report

The Project Performance Report for Transitional Housing projects will be published next Thursday.

Emergency Shelter 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
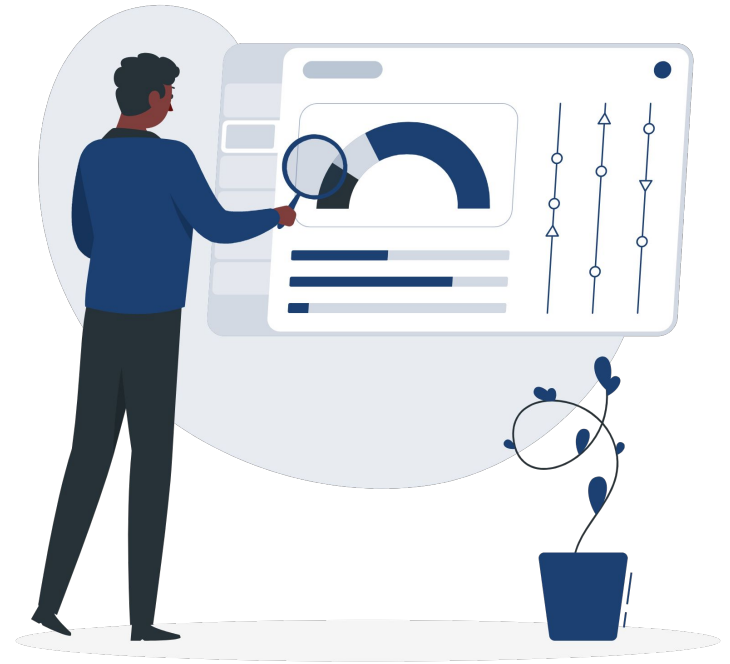
Holiday Observed

The HMIS Help Desk will be closed on **Monday, December 25 - Tuesday, December 26th** in observance of **Christmas** and **Monday, January 1st** in observance of **New Years**.

We will be back in the office the following business day to assist you on Wednesday, December 27th and Tuesday, January 2nd.

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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: Jan 3rd