**OC HMIS User Meeting Webinar Minutes**
**01/03/24**

# Contents

# Agenda Items

## *HIC and Sheltered PIT*

The night of the count is January 22th and the following project type are required to participating in the 2024 HIC and Sheltered PIT: Emergency Shelter, Transitional Housing, Rapid Re-Housing, Permanent Supportive Housing and Other Permanent Housing

Action that could be done now are as follow:

- Complete data entry and data clean-up in HMIS
- Set-up new agencies and projects as needed
- Close projects that are no longer active

2024 HIC and Sheltered PIT Reporting Timeline:

- Jan 17th - HIC/Sheltered PIT Training
- Jan 22th - Night of Count
- Jan 24th - Agencies complete data entry into HMIS/comparable database
- Jan 26th - 211OC sends HIC Forms (all agencies) and PIT data (HMIS agencies)

- HIC Forms are now Cognito forms which will be more user-friendly and each project will be record on a separate form
- Phase 1: Jan 29th - Feb 6th Agencies review/correct HIC Form and PIT data as needed
- Phase 2: Feb 8th - Mar 15th 211OC reviews forms and works with agencies as needed
- Phase 3: Mar 18th -  Mar 22nd 211OC completes HIC updates in HMIS
  - Mar 25th - 211OC imports HIC data from HMIS to HDX
  - Mar 26th - 211OC sends final data to agencies for confirmation
  - Mar 29th - Agencies confirm HDX data matches the final HIC Answer Form

## CES Updates

On December 20, 2023, the Continuum of Care Board approved new CES Policies and Procedures. Veterans will be considered simultaneously for all veteran and non-veteran specific housing opportunities.

- To be included on the Veteran Registry, Veteran must be the head of household and Veteran status must be 'yes' on the client profile screen  in HMIS

- Veteran Coordinated Entry Assessment is discontinued as of 1/1/24.
  - Veterans with a completed Veteran Coordinated Entry Assessment are not required to be re-assessed unless their housing interests have changed.
  - Complete the Individual CES Assessment or the Family CES Assessment based on household composition to refer veterans to the CES community queue.

## HMIS User Fee

Agencies that receive funding that requires HMIS participation will be charged for the number of licenses the agency has active at the end of the calendar year, based on the fee structure detailed below:

  - 1 – 5 users: $750 annually
  - 6 – 24 users: $2,750 annually
  - 25 or more users: $3,500 annually
- Agencies that are Coordinated Entry Access Points will be charged an annual fee of $200 in addition to any user fees they may incur. This applies to all Access Points, whether or not they are required to participate in HMIS. The $200 fee will apply to agencies regardless of the number of Coordinated Entry Systems they are participants in.
- Agencies are allowed up to two active Agency Administrators at a time. Agencies will be allowed an additional Agency Administrator for every 700 active enrollments at the end of the calendar year. Agencies that require additional Agency Administrators in addition to those outlined in this policy must pay the set-up and ongoing user fees for those accounts.

For details regarding how your fee was calculated, review the 2024 Agency Fees spreadsheet located in your agency's Dropbox. If payment is required, your agency will receive an invoice via email within the next couple weeks with payment instructions, and will have 60 days from the invoice date to submit payment.

## *Updated HMIS Grievance Form*

The OC HMIS Grievance Form has been updated to include our office's address: Orange County United Way Attn: HMIS Department 18012 Mitchell South Irvine, CA 92614

- Please note our address has changed. Ensure that your agency is providing the updated form to participants.
- Agencies participating in OC Clarity should review forms on a quarterly basis to ensure they have the most up to date forms.

To access to the HMIS forms on the ochmis.org site, navigate to the HMIS Forms and Document tab> HMIS Policy and Privacy Forms

## *HMIS Part 2 Recertification*

A reminder that the 2023 HMIS Part 2 Recertification is due this month.

- 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 the extended date of January 19th will have their accounts locked until the Recertification is completed.

The 2024 Recertification schedule has been updated and will take place this upcoming summer for the users that were added between the dates of 06/01/23-12/31/2023.

- Moving forward the HMIS Part 2 Recertifications will take place in July, the recertifications will resume the following year 2025 for all users.
- Agency Admin can run the Agency Active Users report to review active users at their agency as needed: Data Analysis > User Management > Agency Active Users.

## *DropBox Clean Up*

- Bi-Annual DropBox Clean Up Schedule: January and July
- Please review your Agency's DropBox folder and download any files you will need for your records by Friday, Jan 19th
- The HMIS Helpdesk will be removing all DropBox files on Monday, Jan 22nd.

## *HMIS Support Tickets - HappyFox*

The HMIS Helpdesk is updating the message thread on our support tickets to reduce the overall size of the tickets. You will only receive the current reply in the thread. If you would like to see the complete message thread we recommend creating a HappyFox account.

Agency Administrators can create a HappyFox Account to track the tickets that you created.

- The HappyFox account will allow you to see all your tickets after the account is created. It does not let you see historial tickets that were sent into the HMIS Help Desk prior to the HappyFox account creation.
- Only Agency Administrators should create a HappyFox Account.

For information on creating a HappyFox account, please refer to the knowledge base article Creating a Help Desk Account

### *Logging into Clarity*

If users are having difficulty logging into the live Clarity site make sure they are accessing the correct version of the site by checking the web address

- The login page for the live Clarity site and the training Clarity site are nearly identical to one another
- The only noticeable difference between the sites is in their web addresses which differ slightly from one another:
    - https://octrain.clarityhs.com/login - Training site
    - https://oc.clarityhs.com/login - Live site

Use the Troubleshooting Logging into HMIS KB to troubleshoot some of the most common issues users face when trying to log into the live Clarity site

### *User Training and Access Role*

All users who require access to view and enter data in HMIS must complete the following trainings:

- HMIS Part 1 - History of HMIS, privacy and security, basic HUD definitions, and best practices
- HMIS Part 2 - Basic HMIS functionality
- HMIS Part 2 Task List

New and existing users who require additional CES access must also complete the HMIS CES Training course prior to AA's requesting CES access for that user

If users haven't completed all required trainings for their access role will have a delay in their account set-up

More information can be found in the New Staff Onboarding KB

### *Enrolling Additional Household Members*

When enrolling additional household members to a program where the other household members are already enrolled, you would need to enroll the client from the Programs page of any of the members that were originally enrolled.

Users should not enroll the client from their own Programs page, because by doing so the participant would be enrolled as an individual.

Prior to enrolling the new household member into a project, the client must first be added to the Global Household in the Household Members section of the Profile screen.

For information please review Global Household VS Program Household and Enrolling Additional Household Members

## *Understanding Individual Enrollments and Group Enrollments*

There are two types of enrollments in Clarity: Individual Enrollments, and Group Enrollments.

Individual Enrollments
- Clients who are enrolled in a project alone without any other household members are enrolled as an individual.
- The Individual Enrollment is created in the Programs Tab of the client who is being enrolled in the project.

Group Enrollments
- Clients who are enrolled in a project with other household members are enrolled as a group.
- Group Enrollment is created in the Program Tab of any of the household members that are already enrolled in the project.

For information please refer to the knowledge base article Understanding Individual Enrollments and Group Enrollments

## *Accessing and Completing the Release of Information (ROI) Page*

Users can access the ROI screen by clicking on the Client Privacy button that is also featured on the client's main profile page. You will then see the ROI screen where you can scroll to the Release of Information section and click Add Release of Information.

This page is used to document whether or not the client gave their consent to have their personal information shared with other agencies in HMIS. The Release of Information pop-up window will require that the following information be entered:

Permission

- Yes - Client provided consent to share their information in HMIS
- No - Client did not provide consent to share their information in HMIS

Documentation

Enter the way in which the ROI was stored:
1. Electronic Signature
2. Attached PDF
3. SIgned Documentation

## *Project Performance Report*

The Project Performance Report (PPR) for Emergency Shelter will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found on the OC HMIS website: Project Performance Reports

Street Outreach PPR draft data will be uploaded into DropBox by EOD Thursday, Jan 4th.

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 quarterly Data and Performance Management Meeting is scheduled to resume Feb 14th at 10am.

## *Holiday*

The HMIS Help Desk will be closed on Monday, January 15th in observance of Martin Luther King Jr. Day. We will be back in the office the following business day to assist you on Tuesday, January 16th

## *Q&A*

HMIS Support Tickets - HappyFox
- Q: Will this account creation also be visible for HMIS-comparable agencies?
  - A: Yes, the HappyFox account is tied to any tickets that are submitted under your email address.

General Questions

- Q: For the health insurance if they receive Medi-Cal do select medicaid or state health insurance adult or child option?
  - A: Clients that receive General Relief (GR) or Supplemental Security Income (SSI) typically receive Medicaid (Medi-Cal aka CalOptima). Medicaid is a partnership between federal and state funds. It should always be listed as Medicaid, not State Health Insurance. For more information, please refer to this knowledge base article Health Insurance

## *Future Meeting Information*

### *February 2024 HMIS User Meeting Webinar*

- Date: Wednesday, February 7rd, 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.