

Welcome!

January 2024
OC HMIS User Meeting

**Please enter your agency
name in the chat box**



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Agenda

1. HIC and Sheltered PIT
2. CES Updates
3. HMIS User Fee
4. Updated HMIS Grievance Form
5. HMIS Part 2 Recertification
6. DropBox Clean Up
7. HMIS Support Tickets - HappyFox
8. Logging into Clarity
9. User Training and Access Role
10. Enrolling Additional Household Members
11. Understanding Individual Enrollments and Group Enrollments
12. Accessing and Completing the Release of Information (ROI) Page
13. Project Performance Report
14. Holiday
15. Q&A
16. Office Hours

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2024 HIC and Sheltered PIT

Who should participate?

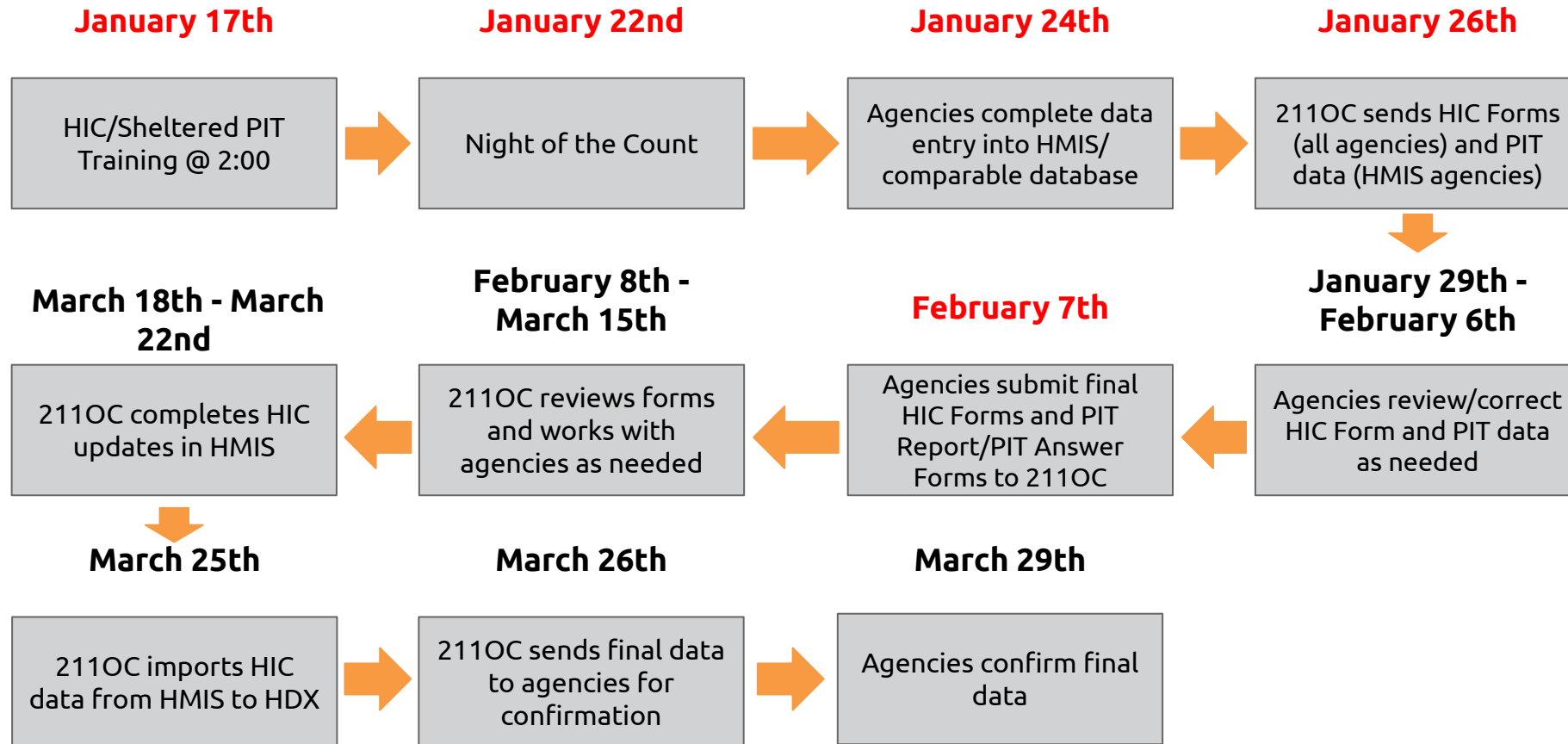
Agencies with any of the following project types, whether or not the projects are in HMIS:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

What can I do now?

- 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- Close projects that are no longer active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 Timeline



CES Update

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.



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2024 HMIS User Fees

- Agencies will receive invoices for 2024 HMIS User Fees within the next two weeks
- Payment due 60 days from date of invoice
- 211OC will upload user fees to each agency's Dropbox



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2024 HMIS User Fees

HMIS Participation Required

- 1 – 5 users: \$750 annually
- 6 – 24 users: \$2,750 annually
- 25 or more users: \$3,500 annually

CES Access Point

\$200 per agency

Agency Administrators

\$759.28 per Agency Administrators not covered under current Policies and Procedures

Updated HMIS Grievance Forms

- The OC HMIS Grievance Form has been updated, 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](http://ochmis.org), navigate to the HMIS Forms and Document tab and select HMIS Policy and Privacy Forms

Orange County Continuum of Care Homeless Management Information System (OC HMIS)

HMIS Grievance Form

If you feel a violation of your rights as an HMIS client has occurred or you disagree with a decision made about your "Protected HMIS Information" you may complete this form. Complete this form only after you have exhausted the grievance procedures at the agency you have a grievance with. **It is against the law for any agency to take retaliatory action against you if you file this grievance. You can expect a response within 30 days via the method of your choice.**

Grievances may be submitted to the OC HMIS team by either of the following methods:

- Call the HMIS team at (714) 589-2360
- Send this form to:
Orange County United Way
Attn: HMIS Department
18012 Mitchell South
Irvine, CA 92614



Your Name: _____ Date of Grievance: _____
Best Way to Contact You: Phone Mailing Address
 Email Case Manager/Advocate

Your Phone Number: _____ Your Email Address: _____

Your Mailing Address: _____

Case Manager/Advocate Contact Information (optional)

Name: _____ Email Address: _____
Phone Number: _____ Agency: _____

Grievance Information

Name of Individual who violated your privacy rights

Name of Agency who violated your privacy rights

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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.



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HMIS Part 2 Recertification Update

- 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.



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DropBox Clean Up

- Bi-Annual DropBox Clean Up Schedule:
 - January
 - 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
- Thank you for your cooperation!



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HMIS Support Tickets - HappyFox

We are 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 historical tickets that were sent into the HMIS Help Desk prior 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](#)



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HMIS Support Tickets - HappyFox

2-1-1 | OC HMIS Help Desk Submit Ticket Knowledge Base Login

Welcome to our Support Center

Login

Login to know the status of the ticket

Username or Email

Password

Remember me [Forgot password?](#)

Login

Login to track your existing support requests. If you have not created a ticket yet then you would need to **register** or create a new ticket to begin.

Submit ticket

HMIS Support Tickets - HappyFox

OC HMIS Help Desk

Search Tickets

Submit Ticket Knowledge Base My Tickets TH

TICKETS

- All Tickets 1
- Pending Tickets 1
- Closed Tickets 0

STATUSES

- New
- User Response Needed
- 211 Staff Response Needed
- Solved
- Closed
- HIC Final Review Stage
- BitFocus Fix Needed
- H-P: 211 Response Needed
- H-P: User Response Needed
- FCES BED RESERVATION
- HUD Ticket Entered
- AUDIT: USER RESPONSE NEEDED
- AUDIT: 211 RESPONSE NEEDED
- HF Testing
- IND CES

CATEGORY

All Tickets

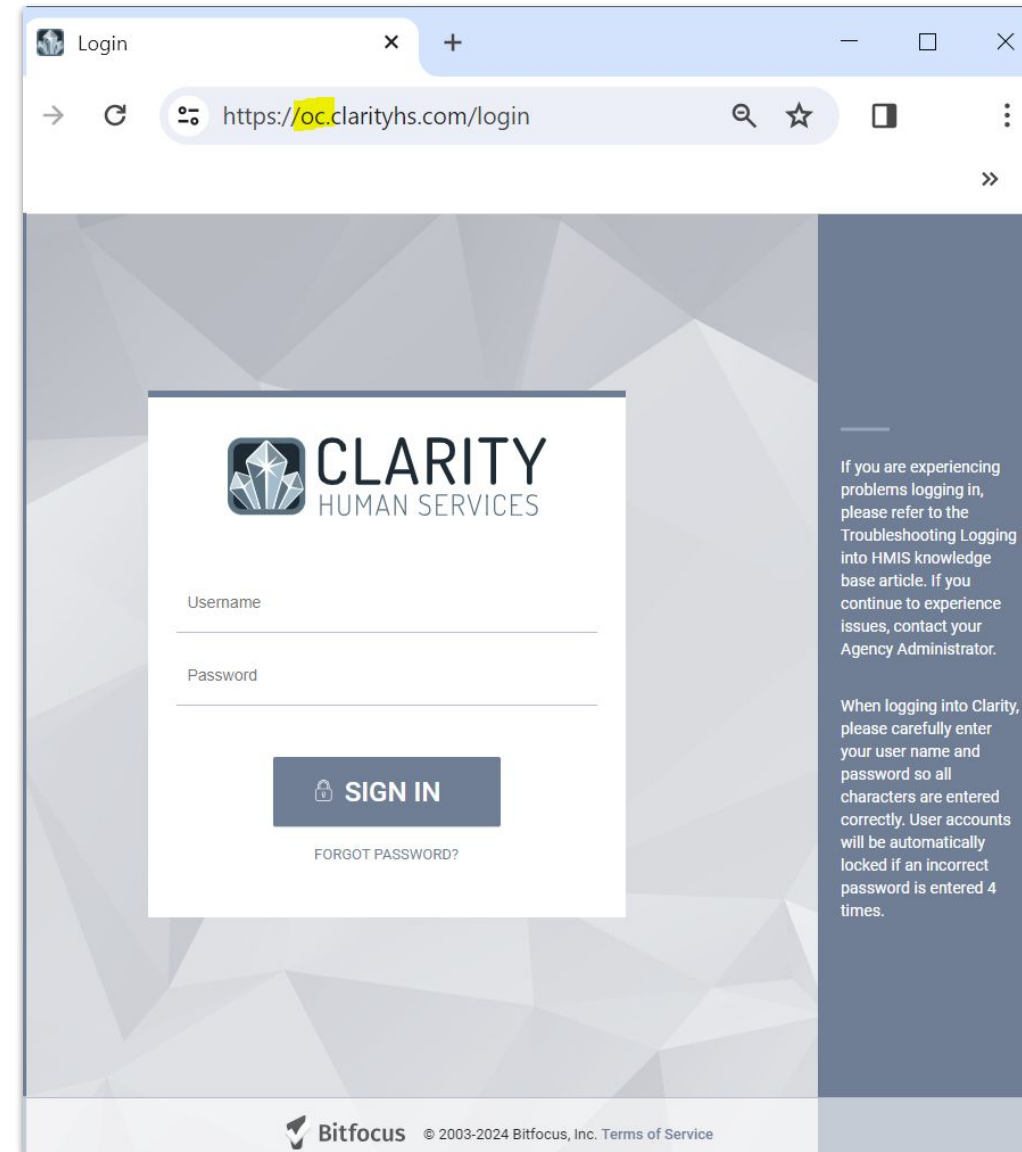
Unresponded by agent Filter 1 - 1 of 1

STATUS	SUBJECT	RAISED BY	CATEGORY	TICKET ID	LAST UPDATED
NEW	Test	Test HMISHe...	HMIS - Setup	#HS00018886	9 minutes ago

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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 the most common issues users face



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User Training and Access Roles

- All users who require access to view and enter data in HMIS must complete the following trainings:
 - HMIS Part 1 - History, Privacy, and Best Practices
 - HMIS Part 2 - Basic 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 requesting CES access
- 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](#)



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HMIS Online Course Transcript


My Online Courses

[Dashboard](#) • [My Courses](#) • [My Grades](#) • [My Memberships](#) • [My Achievements](#) • [My Certificates](#) • [Notifications](#) • [Edit Account](#) • [Redeem a Voucher](#) • [Order History](#) • [Sign Out](#)

My Achievements

Congrats!


HMIS PART 2 TRAINING COMPLETE



HMIS Part 2 Training Complete!

Congrats!


HMIS PART 1 TRAINING COMPLETE



HMIS Part 1 Training Complete!

Congrats!


2020 CES DATA STANDARDS TRAINING COMPLETE



2020 CES Data Standards Training

Congrats!


COORDINATED ENTRY TRAINING COMPLETE



HMIS Coordinated Entry Training Completed!

Congrats!

AGENCY ADMINISTRATOR TRAINING COMPLETE



HMIS Agency Administrator Training Completed!

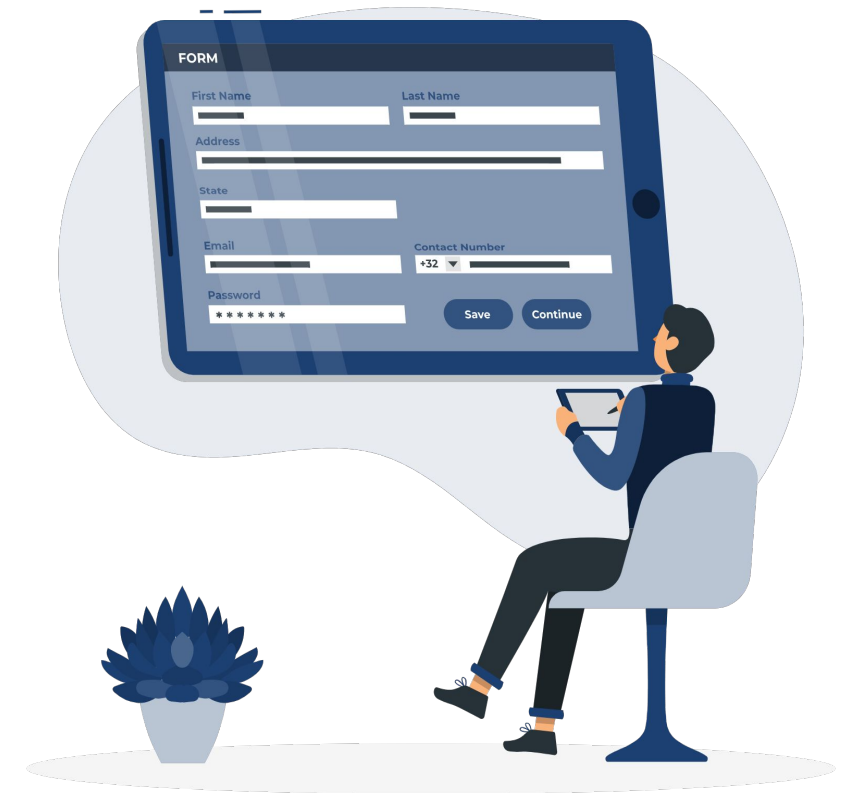
Enrolling Additional Household Members

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](#)



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Understanding 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](#)



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Accessing and Completing Release of Information (ROI) Page

The HMIS Helpdesk has noticed that users are experiencing some difficulties completing this section of the HMIS Part 2 Recertification Exam

You can access the ROI screen by clicking on the Client Privacy button that is also featured on the client's main profile page.

Once you select a method mentioned above, you will see the ROI screen, scroll to the Release of Information section and click Add Release of Information.

The screenshot displays the HMIS system interface for a client named Parnis Casey. The top navigation bar includes the client's name, a search icon, and a 'CASELOAD' button. Below the navigation bar, a yellow warning banner states: 'Release Of Information is Missing. Please add one to ensure compliance (Click here)'. The main content area is divided into two sections: 'CLIENT PROFILE' and 'PRIVACY'. In the 'CLIENT PROFILE' section, the 'Social Security Number' is masked as 'XXX - XX - XXXX' and the 'Quality of SSN' is 'Client doesn't know'. A 'Client Privacy' button is highlighted with a red box. In the 'PRIVACY' section, the 'Client Privacy' tab is selected, and the 'Public' radio button is chosen. Below this are 'SAVE CHANGES' and 'CANCEL' buttons. At the bottom of the 'PRIVACY' section, the 'RELEASE OF INFORMATION' section is visible, with an 'ADD RELEASE OF INFORMATION +' button highlighted by a red box. The text 'There are no results to display' is shown below this section.

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Accessing and Completing Release of Information Page (continued)

The Release of Information pop-up window will require that the following information be entered. 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.

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. There are several options listed:

1. Electronic Signature
2. Attached PDF
3. Signed Documentation

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	03/12/2018	
End Date	03/12/2019	
Documentation	Select	▼

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Project Performance Reports

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 at on the [Orange County HMIS](#) website: OCHMIS Website> Reports > [Project Performance Reports](#)

Street Outreach PPR draft data will be uploaded into DropBox by EOD Thurs, 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.



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Holiday Observed

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



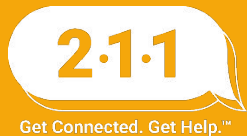
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Q&A

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



Thank you
Have a great day!

Next User Meeting: Feb 7th

