

## OC HMIS User Meeting Webinar Minutes 02/07/24

### Contents

Agenda Items	1
Quarter 4 Data Quality Report Card	1
CoC Dashboard	2
HMIS Agency Fee	2
HIC PIT Reminder	2
History Tab	2
Duplicate Enrollment	3
Relationship to Head of Household Error	3
Duplicate Client Records	3
Project Performance Report	4
Holiday	4
Q&A	4
Future Meeting Information	6
March 2024 HMIS User Meeting Webinar	6

### Agenda Items

#### ***Quarter 4 Data Quality Report Card***

The HMIS Helpdesk Team will be publishing 2023 Q4 Data Quality Report Cards shortly. Data Quality Report Cards will be looking at the following:

- Data Completeness - Data Completeness refers to the degree to which all required data is known, valid and documented in HMIS. A data element is considered to have a valid response when it is in accordance with the HUD Data Standards, and it is different from Client Doesn't Know, Client Refused, and Data Not Collected.
- Data Accuracy - Data accuracy refers to the degree to which data entered in HMIS represents the real information on the clients that are served in the projects contributing data to the system.
- Data Timeliness - Data Timeliness refers to the degree to which the data is collected in HMIS and available when it is needed.

Review the previous quarters' reports are available on the OC HMIS website, [Data Quality Report Cards](#)

## ***CoC Dashboard***

The CoC Dashboard contains information on clients who were active in any project type in HMIS or who contacted 211OC for information and referral. The Quarter 4 CoC Dashboard has been published and is available on the OC HMIS website, [Orange County CoC Dashboard](#)

## ***HMIS Agency 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, please review the [HMIS Policies and Procedure](#) for general information about the agency fee under the Participating Agency Requirements section.

Agencies will start receiving invoices by the end of the week for the 2024 HMIS User Fees. We will be emailing the invoices out so please keep an eye out for that email. Payment is due 60 days from the date of invoice.

## ***HIC PIT Reminder***

Agencies should submit the final HIC Forms and PIT Report/PIT Answer Forms to 211OC on February 7th. The next phase will be 211OC reviews forms and works with agencies as needed.

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)
- 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

For more information, please refer to the [2024 HIC and Sheltered PIT](#) knowledge base article.

## ***History Tab***

The History tab in a Client's profile can be used to referenced the following:

- Editing and/or viewing details of: General services, Programs Program-Based, Services, Assessments
- Managing the following: Program Association, Expense Items, Service Notes, Attendance, Group Options

The history tab can also be referenced to verify if a client you are working with is on the community queue.

- To verify that a client is on the community queue, navigate to the history tab and filter for "Coordinated Entry". This will filter the history page to only show events relevant to CES.

- If a client has been successfully referred to the Community Queue, the history tab should show the following historical items:
  - A Completed CES Assessment
  - An Active Coordinated Entry Enrollment
  - An Active Referral to the Community Queue

For more information, please refer to the [History Tab Overview](#) knowledge base article.

### ***Duplicate Enrollment***

A duplicate enrollment occurs when a client is enrolled in the same program during overlapping, conflicting time periods.

When a duplicate program enrollment occurs, the HMIS user and the agency's HMIS Agency Administrator should determine which program enrollment is the primary enrollment so that all the services and notes from the secondary are transferred to that enrollment.

Once the transfer is complete, the HMIS Agency Admin will need to provide support with deleting the services and secondary, erroneous enrollment.

For more information, please refer to the [Deleting Program Enrollment](#) knowledge base article.

### ***Relationship to Head of Household Error***

Incomplete data regarding a client's status in relation to their Head of Household (HoH) is a recently identified error that can cause reporting issues.

Our vendor, Bitfocus, identified that this error can also occur when a program merge is processed, albeit this type of error is less common than the one resulting from Head of Household status.

To check for potential errors that can result from an invalid HoH status navigate to: Reports > Data Analysis > Built in Reports > [LSA Data Cleanup: Household and Enrollment Data](#) and run that report

When a HoH error is identified, navigate to and edit the Head of Household relationship within the program enrollment screen. After selecting the HoH, a list of program enrollment members will be displayed and you will be able to change program members' relationship to the Head of Household.

Keep in mind that the default LSA Data Cleanup: Household and Enrollment Data reporting period coincides with the LSA reporting period. To view data that falls outside of that timeframe Agency Administrators must adjust the reporting period as needed to view relevant data.

For more information, please refer to the [Editing a Clients' Relation Status](#) knowledge base article.

### ***Duplicate Client Records***

Sometimes the same client has more than one record in HMIS. Usually this is because a client already had an

existing Client Record and was served by an agency that did not search for an existing Client Record before creating a new one.

- Go to the Search Tab, which is the central hub and home page of the system
- In the search bar, enter only partial first and last names of the client you are searching for with the first two letters of the First Name and Last Name.
- You can also search by complete or partial SSN, DOB, and Aliases; the system will display potential clients that match your criteria. It is important to be thorough when searching for a client in HMIS so that duplicated records of the same client are not created in the system.

For more information, please refer to the [Duplicate Client Records](#) knowledge base article.

### ***Project Performance Report***

The Project Performance Report (PPR) for Street Outreach PPR 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](#)

Homelessness Prevention PPR draft data will be uploaded into DropBox within the week of Feb 5th.

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 Wednesday, Feb 14th at 10am.

### ***Holiday***

The HMIS Helpdesk will be closed on **Monday, February 19th** in observance of **Presidents Day**. We will be back in the office the following business day to assist you on Tuesday, February 20th.

### ***Q&A***

HIC PIT Reminder

- Q: Does every agency have to complete the HIC/PIT forms?
  - A: The HIC/PIT is specific to certain project types (Emergency Shelter, Transitional Housing, Rapid Re-Housing, Permanent Supportive Housing, and Other Permanent Housing). You should have already received a ticket to work with the HIC and PIT forms.
- Q: How do I get my PIT numbers for the clients? Is it in DropBox?
  - A: Yes PIT data was sent to the agency DropBox for agencies that participate in HMIS. Agencies that don't participate in HMIS, your agency will need to pull a program roster report from your

comparable database.

### HMIS Agency Fee

- Q: When will the 2024 HMIS User fees invoice be placed in the drop box?
  - A: The agency fee invoice will be emailed out and will not be added to DropBox.
- Q: Could we go over the HMIS User fees again? Or if I could be linked the info I'd appreciate it.
  - A: The invoice will have a specific tier of fees for your agency. The fee is determined by the number/type of users license your agency has. You can refer to the [HMIS Policies and Procedure](#) for general information about the agency fee under the Participating Agency Requirements section.

### General Questions

- Q: How do users get on the CES email distribution list?
  - A: The users that are approved for CES access are sent a welcome email and are added to the CES email distribution list. If you may have any additional questions about the CES email distribution list please contact the Office of Care Coordination/CES Lead, [CoordinatedEntry@ocgov.com](mailto:CoordinatedEntry@ocgov.com).
- Q: How would we go about collecting and updating the new fields for the [FY2024 HMIS Data Standards](#) for participants enrolled prior to Oct 1, 2023, for example Sexual Orientation that is required to be collected for PH projects?
  - A: The HMIS Helpdesk received the following guidance from HUD: HUD is requiring the collection of Sexual Orientation for PSH projects so that HUD and communities can begin to understand what disparities may exist in who is able to access housing supports through the CoC Program. CoC-funded PSH projects are required to attempt to collect this information from participants. That being said, it is important to remember that participants have the right to decline to provide a response without any impact on their participation in the project.

HUD has some resources available on the [HUD Exchange related to using a client-centered approach](#) that may be helpful to review when conducting intake and collecting participants data. Feel free to review the [HMIS Data Collection Requirements](#) for additional details about the updated fields.

Providers will need to determine the appropriate time to discuss and collect the updated FY2024 HMIS Data Standard fields with participants. If this data is not collected, then the appropriate response is to input "Data not collected".



## ***Future Meeting Information***

### ***March 2024 HMIS User Meeting Webinar***

- Date: Wednesday, March 6th, 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.