



Get Connected. Get Help.™

Welcome!

February 2024
OC HMIS User Meeting

JOURNEY 100 TO



Agenda

1. Quarter 4 Data Quality Report Card
2. CoC Dashboard
3. HMIS Agency Fee
4. HIC PIT Reminder
5. History Tab
6. Duplicate Enrollment
7. Relationship to Head of Household Error
8. Duplicate Client Records
9. Project Performance Report
10. Holiday - President's Day

Quarter 4 Data Quality Report Card

[Q4 Data Quality Report Card](#) will be published shortly! We will email a newsletter with a link to the report card once it is posted. The Report Cards look at the following:

- Data Completeness
- Data Accuracy
- Data Timeliness

The report card will have a slicer which will allow the agencies to review their data as a whole. The project level slicer will still be available.

The UDE Data Completeness Dashboard /Details as well as the Timeliness Dashboard/Details reports also include the Agency and Project Name filters.

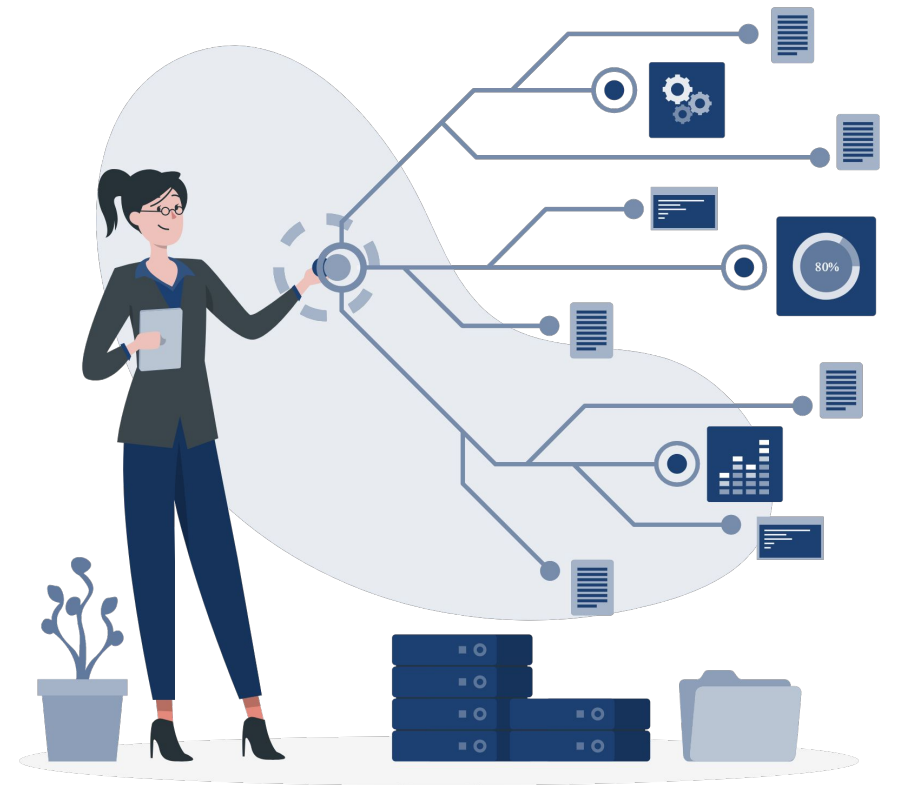


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CoC Dashboard

The CoC dashboard contains information on clients who were active in any project type in HMIS or who contacted 211OC for information and referral.

- Quarter 4 : October - December 2023
- ochmis.org > Reports > [Orange County CoC Dashboard](#)



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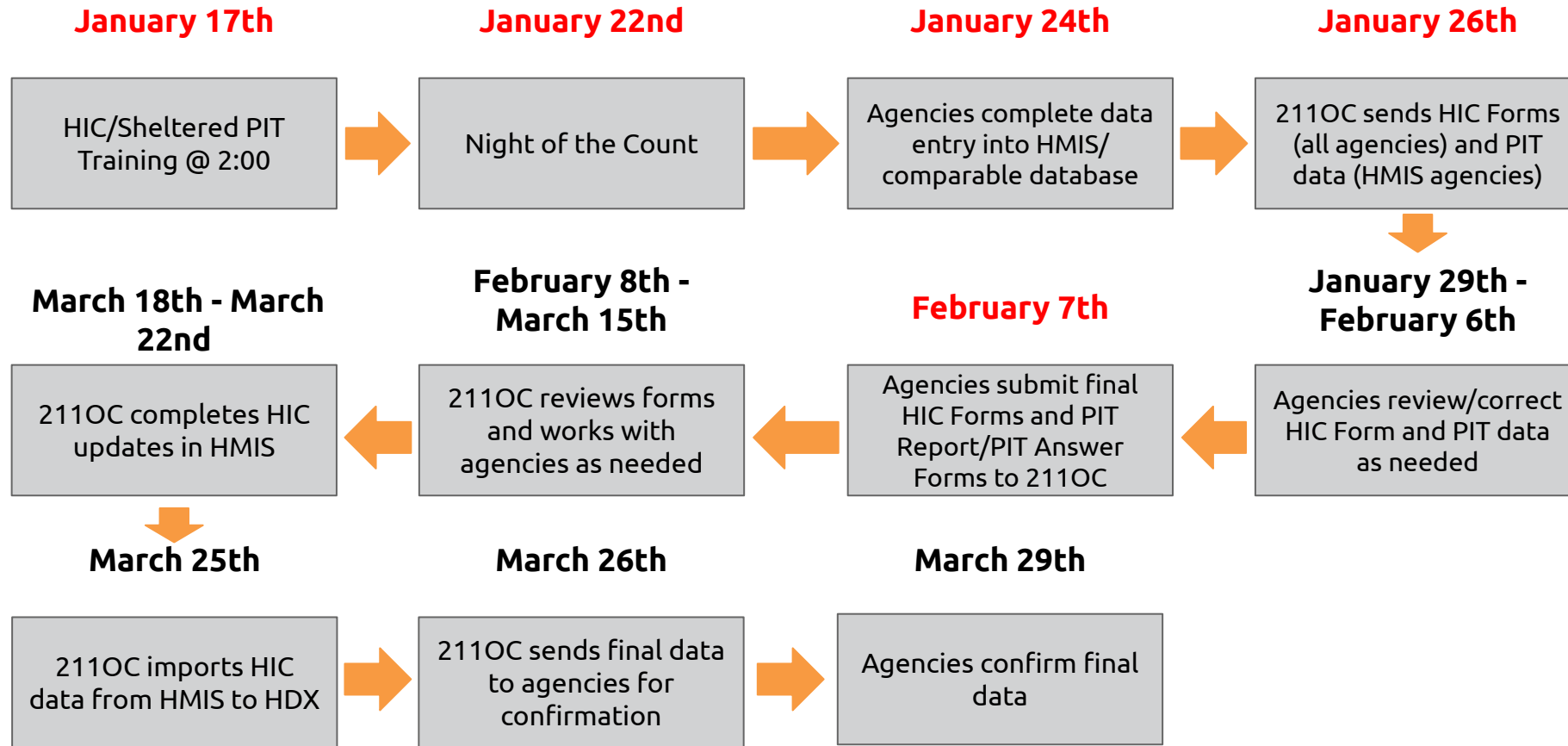
2024 HMIS User Fees

- 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 date of invoice.



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2024 HIC and Sheltered PIT Timeline



HIC/Sheltered PIT Resources

- [2024 HIC and Sheltered PIT](#)
- [Filling Out the HIC Form and HIC Client Form](#)
- [Filling Out the PIT Answer Form](#)
- [Running the HIC: Average Family Size Report](#)
- [Running a Saved Look](#)
- [How to Access your Agency's Dropbox Folder](#)

Contact the [HMIS Help Desk](#) with any questions

History Tab

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

1. Editing and/or viewing details of:

- General services
- Programs
- Program-Based Services
- Assessments

2. Managing the following:

- Program Association
- Expense Items
- Service Notes
- Attendance
- Group Options

The screenshot displays a user interface for a client profile. At the top, the name "Jane Doe" is shown, followed by a navigation bar with tabs: PROFILE, HISTORY, PROGRAMS, SERVICES, LOCATION, CONTACT, NOTES, FILES, and ASSESSMENTS. Below this is a "CLIENT PROFILE" section with fields for Social Security Number (XXX - XX - 6789), Quality of SSN (Full SSN Reported), Last Name (Doe), and First Name (Jane). The "HISTORY" tab is active, showing "Advanced Search Options" with filters for Search, Start Date, End Date, Category (Any category), Agency (Any agency), and Type (Any type, Assessments, Programs, Referrals, Services, Reservation). A legend at the bottom identifies icons for Program, Service, Referral, Reservation, and Assessment.

History Tab (continued)

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:

1. A Completed CES Assessment
2. An Active Coordinated Entry Enrollment
3. An Active Referral to the Community Queue

Our KB article [History Tab Overview](#) explores this topic in further detail

Advanced search options View ▾

Service Name	Start Date	End Date	
Referral: Coordinated Entry System County of Orange referral to Community Queue ⓘ	01/03/2023	Pending	
Referral: Springfield Homeless Shelter County of Orange referral to A Springfield Agency ⓘ	01/03/2023	01/03/2023	
Individual CES Assessment County of Orange ⓘ		01/03/2023	 
Referral to Emergency Shelter bed opening:Referr... County of Orange ⓘ	01/03/2023	01/03/2023	
[OC Custom] Individual Bed Reservation Assessm... County of Orange ⓘ		01/01/2023	
Individual Coordinated Entry System County of Orange ⓘ	01/01/2023	Active	

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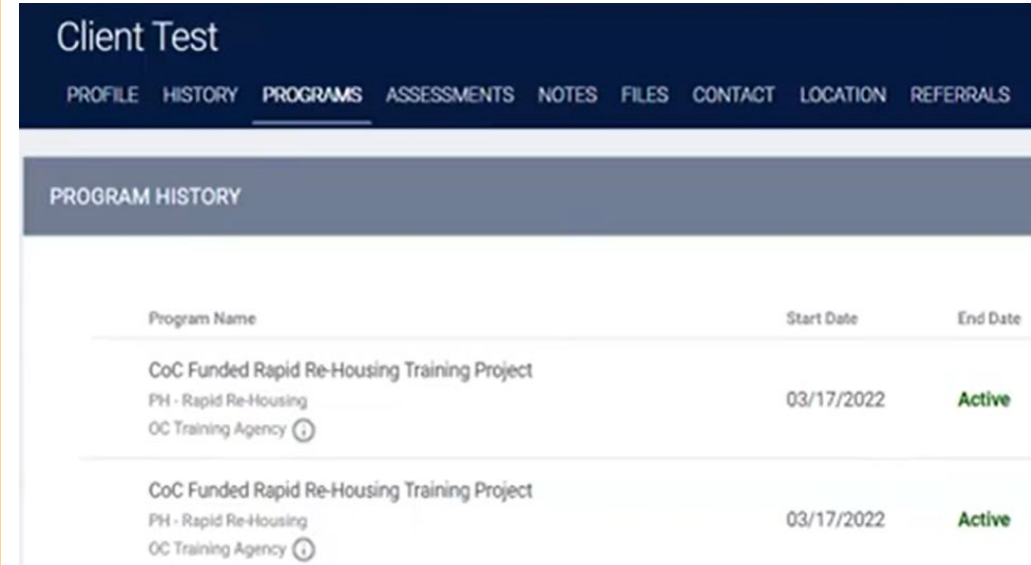
Duplicate Enrollments

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 is 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.

Our KB article [Deleting Program Enrollment](#) explores this topic in further detail

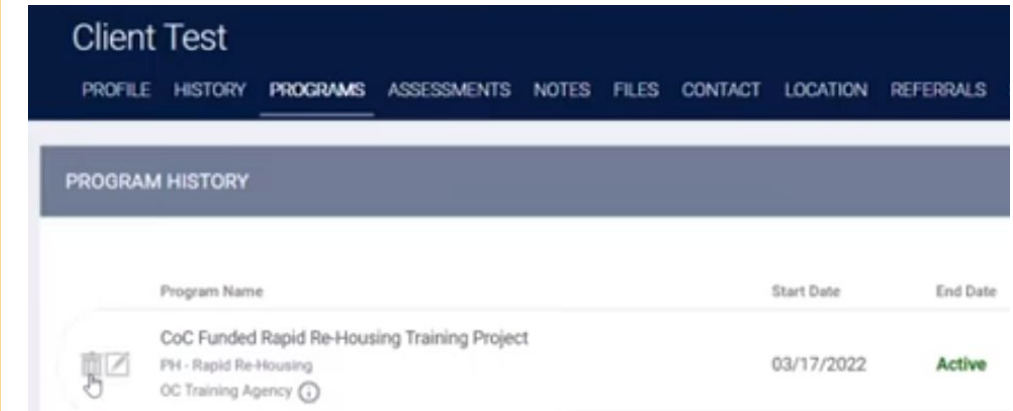


Client Test

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM HISTORY


Program Name	Start Date	End Date
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing OC Training Agency ⓘ	03/17/2022	Active
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing OC Training Agency ⓘ	03/17/2022	Active



Client Test

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Relationship to Head of Household

Incomplete data regarding Head of Household (HoH) status is a recently identified error that can cause reporting issues.

Our vendor, Bitfocus, identified that this error sometimes occurs when a program merge is processed.

To check for errors resulting from invalid HoH status navigate to:

- **Reports > Data Analysis > Built in Reports > LSA Data Cleanup: Household and Enrollment Data** and run the report

The default Household and Enrollment Data reporting period coincides with the LSA reporting period. Agency Administrators should adjust the reporting period as needed to view current data.

Relationship to Head of Household


When the Head of Household error is identified, navigate to and edit the Head of Household relationship within the program enrollment.

27 DAYS
ACTIVE PROGRAM

Program Type: Group (5)

Program Start Date: 01/03/2024

Assigned Staff:

Head of Household: Homer Simpson 

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Relationship to Head of Household

After selecting the Head of Household, the list of program enrollment members will be displayed and you can change the relationship to the head of household.

Our KB article [Editing a Clients' Relation Status](#) explores this topic in further detail

27 DAYS ACTIVE PROGRAM

Program Type: Group (5)

Program Start Date: 01/03/2024

Assigned Staff:

CHANGE HEAD OF HOUSEHOLD

P	Homer Simpson	Self (head of household) ▼
M	Marge Simpson	Select ▼
M	Bart Simpson	Select ▼
B	Lisa Simpson	Select ▼
L	Maggie Simpson	Select ▼

SAVE CHANGES CANCEL

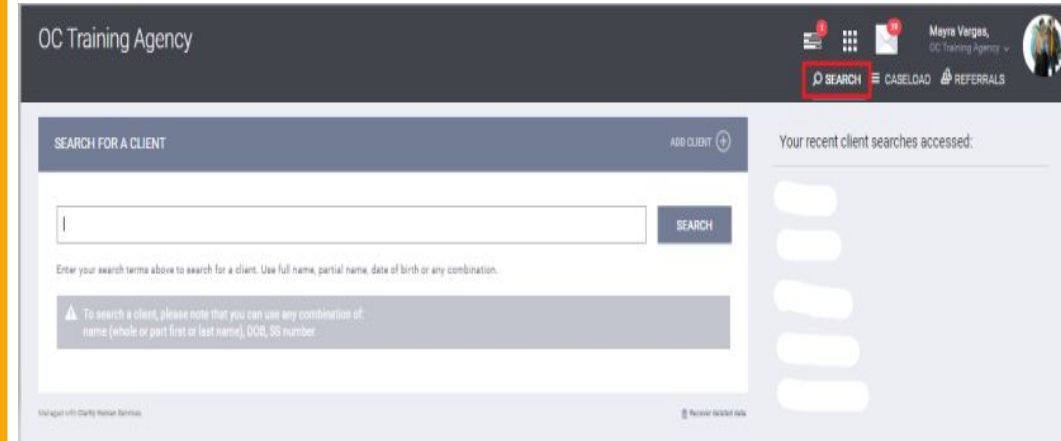
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Duplicate Client Records

Recently we have been getting an influx of Duplicate Clients in HMIS, to avoid this we suggest searching for the client in HMIS.

- 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.

If needing additional assistance please reference our KB article for [Duplicate Client Records](#).



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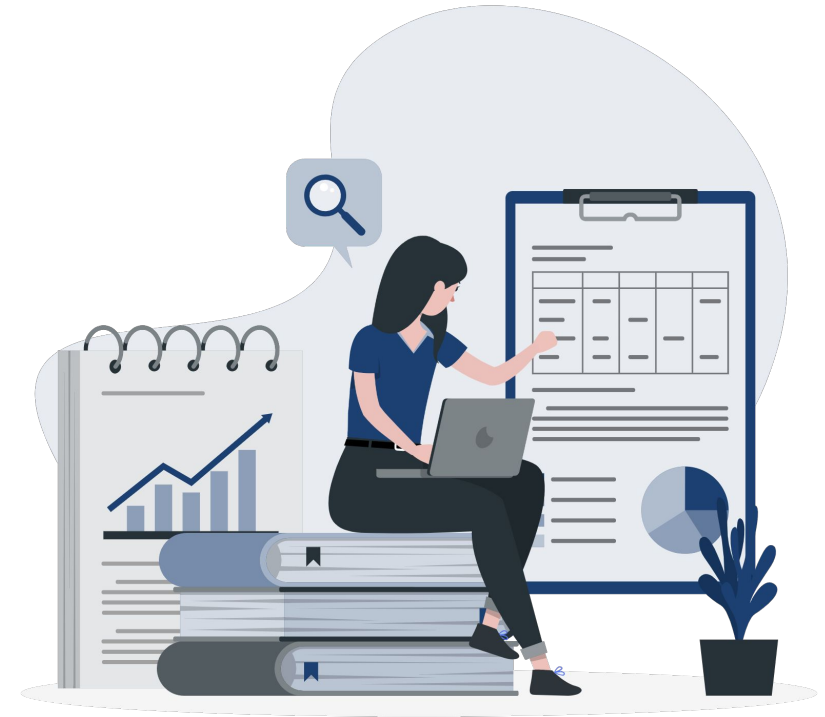
Project Performance Reports

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.



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Holiday Observed

The HMIS Help Desk 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



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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: Mar 6th





Throughout 2024, Orange County United Way is celebrating 100 years of impact in our community. We invite you to join us on our year-long Journey to 100 centennial celebration as we prepare for another century of caring for each other The OC Way. Learn more and see how you can get involved.

UnitedWayOC.org/Journey-to-100