

OC HMIS User Meeting Webinar Minutes 03/06/24

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Agenda Items

System Performance Measure

Notes HUD requires CoCs to measure their performance as a system on an annual basis

HMIS Project Types: Safe Haven, Street Outreach, Emergency Shelter, Transitional Housing, and Permanent Housing (including Permanent Supportive Housing, Rapid Rehousing, and Other Permanent Housing)

Reporting Period: 10/1/22 – 9/30/23

Submitted to HUD February 2024

[SPM Year over Year & 2022 - 2023 Submission Reports](#)

New Field Setting - Multi-select

There is a new field setting that allows for multiple selections from a picklist. This functionality is currently in the fields such as Gender, Federally Recognized Tribe, Race and Ethnicity, and Coordinated Entry Event Categories.

The new setting can be applied to custom fields where a picklist may need additional selections.

HMIS Client Contact Information

Please ensure that all participants have updated and accurate contact information in HMIS. If the participant does not have contact information, the current case manager or alternate contact information should be added.

Sharing contact information in HMIS helps coordinate services and communication across all HMIS participating agencies. In addition, it can help streamline the shelter and housing intake process.

For more information about managing contact information in HMIS, please review the [Saving Client Contact Information](#) knowledge base article and view the [Updating Client Contact Information](#) video.

CES Enrollment and Referral

To avoid errors resulting from invalid CES referrals, the HMIS Helpdesk would like to share the following guidance:

- CES enrollment and exit data should not be modified unless the user has identified an error in a client's CES program. When users edit historic data they may unintentionally prevent clients from appearing in CES reports.
 - Agency Administrators should reach out to the HMIS Helpdesk if they need guidance to determine if a correction should be processed or if a new CES enrollment is needed.
- Additionally, one of the most common errors users receive when referring clients to the Community Queue is in regards to the Head of Household (HoH).
 - The HoH is the client within the household that must have a completed CES assessment to be sent to the Community Queue. In addition, the HoH must also be set as the HoH within the CES enrollment which is distinct from the global household.
- For veteran households, the veteran client should be set as the HoH for the household to be included in the Veteran Registry.
- When a referral has expired the user can use the current assessment to send the referral back to the queue. New assessments should only be created if a client wishes to update their preferences. The HoH's latest assessment is what is used to send the referral to the queue.

Adding Households to the Bed Reservation Community Queue

In order for a household to be considered for any units that become available that become available, the Head of Household (HoH) must have the following:

- An active enrollment in an Individual Coordinate Entry System (ICES) or Family Coordinated Entry System (FCES) project in HMIS
- A Homeless Verification or Chronically Homeless Verification form on file in HMIS
- A completed Current Living Situation Assessment
- A Needs Bed Reservation Assistance service entered by the Access Point in HMIS
- A completed Bed Reservation Assessment

When all of the criteria are met, the household will be considered for placement when a housing opportunity becomes available.

Step #1

Before you can add a household to the Bed Reservation Community Queue, you must first ensure that the household is enrolled in either an ICES or FCES project.

1. Search for the HoH in HMIS, and navigate to the client's *History* page
2. Click on the View dropdown button, change the *Type* dropdown to *Programs*, and click on *Search* to narrow the client's history to project enrollments.
 - a. The Access Point should review the [Enrolling Clients in a Project](#) KB for instructions on how to enroll a client or household in a CES project if they are not already enrolled.

Step #2

The HoH needs a *Homeless Verification* or *Chronically Homeless Verification* document uploaded to HMIS to be eligible for shelter opening.

1. Navigate to the HoH's *Files* page, to confirm whether or not this file has already been uploaded. If it has not been uploaded, click on *Add File*.
2. Change the *Category* dropdown to *Coordinated Entry Documentation*, and select the type of verification that has been received from the HoH. Select the location of the file on your computer, and click on *Save Changes*.

Step #3

A *Needs Bed Reservation Assistance* service is required for the household to be considered for units. Users should recognize that a new Bed Reservation Service needs to be added every week the client wants to be considered for a unit.

1. Navigate to the *Provide Services* tab under the HoH's CES enrollment.
2. Click on the caret next to *Bed Reservation Waitlist* service, then click on the *Needs Bed Reservation Assistance* caret.

Remember that the household will be considered for any units that become available only for the next seven days following the Event Date.

Step #4

The HoH must have a completed *Bed Reservation Assessment* and *Current Living Situation Assessment* in order to be added to the Bed Reservation Community Queue.

1. Navigate to the HoH's Assessment tab under their CES enrollment, and click on *Start* next to the *[OC Custom] Individual Bed Reservation Assessment* or *[OC Custom] Family Bed Reservation Assessment*.
2. Answer the assessment questions, and click on the Save button.
3. Navigate to the HoH's Assessment tab under their CES enrollment, and click *Start* next to *Current Living Situation Assessment*.
4. Answer the assessment questions, and click on the Save button.

Step #5

Once all prerequisites have been met, the household can be added to the Bed Reservation Community Queue. To add the household to the Community Queue, click on the toggle next to the completed *Bed Reservation*, and click *Refer Directly to Community Queue*.

Users can refer to the [Adding Households to the Bed Reservation Community Queue](#) KB for more detailed information.

Managing Household Composition Changes in the CES

A household experiencing homelessness is enrolled into the Coordinated Entry System (CES) to be linked to housing services. In very rare cases, a household may be served by both the Individual and Family Coordinated Entry System. Events that can result in a change in household composition may include but are not limited to clients that become pregnant, a single adult merges households with another adult with a child, or children are permanently removed from the household.

There are 3 scenarios we will go over that will illustrate these changes in household composition.

Scenario #1

The household is active in the CES project, has a change in household composition, and has not been matched to a housing project.

- If the household has not been matched to a housing project, the **Access Point** should [exit the CES enrollment](#)
- If the household is on the Community Queue (CQ), the **Access Point** will remove the household from the CQ and select Reassessed as the Reason for Removal.
 - After exiting, the Access Point will enroll the household into the new CES project, reassess, and add the household to the CQ or connect the household to an appropriate sub-population specific Access Point if necessary. Inform the CES Administrators if assistance is needed with

connecting the household to an appropriate Access Point.

Scenario #2

The household is active in the CES project, has a change in the household composition, and has been matched to a housing opportunity.

- If the household is accepted into the housing project, the household will remain enrolled in the CES project and exited by the **Housing Provider** once the household is placed into a housing unit.
- If the household is seeking Bed Reservation assistance while they wait for their permanent housing placement, the **Access Point** will follow the steps below:
 - The Access Point will notify the CES Administrator that the household is being enrolled in two CES projects at the same time.
 - The **Access Point** will add a note in the original referral to indicate the household will be seeking shelter under a separate CES.
 - [Enroll the household](#) into the appropriate CES and complete the [Bed Reservation Assessment](#).

Scenario #3

The household is active in the CES project, has a change in household composition, and has been matched to a housing opportunity.

- If the household is [denied the housing opportunity](#), the household will be exited from the CES project and removed from the Community Queue by the **Access Point**. After exiting, the **Access Point** will [enroll the household into the new CES project, reassess, and add the household to the CQ](#).

For more information on this topic, please refer to the [Managing Household Composition Changes in the CES KB](#) and [Managing Household Composition Changes in the Coordinated Entry System flowchart](#)

Update to HMIS User Account Form

An update has been made to the HMIS Account Update Form.

- A pop-up question will appear on the form when the 'Read Only' Access Role option is selected regarding the user's need to be added to the CES mailing list.
- In addition to the HMIS Part training, users will also be required to complete the HIMS CES online training course if the user's work responsibilities require participation in the CES Match Meetings.

Recertification Deadline

HMIS users that have not yet completed their HMIS Recertification will have 60 days (March 22nd) from lock out to complete the HMIS Part 2 Recertification.

After the 60 days, HMIS users will be considered inactive and will need to retake HMIS Part 1, HMIS Part 2, and the HMIS Skills Test in order to have their account reactivated.

The HMIS Agency Administrator will need to notify the HMIS Helpdesk to reset the HMIS Part 1 and HMIS Part 2 training for each individual user.

Status and Annual Assessments

Agencies should conduct Status Assessments when any of the following change: Client disability status, Income sources or amounts, Household Composition (meaning someone leaves or joins the household in the project).

HUD requires that clients who have been enrolled in a program for over a year be given an annual assessment. Annual assessments are meant to capture certain data points and are to be collected based on the Project Start Date of the Head of Household.

For Individual Enrollments: Conduct an Annual Assessment within the 30 day window before or after the client's one year anniversary of their Program Start Date, if they are still active as of one year from their Start Date.

- For example, if a client enters your project on January 1st, 2023 and they are still active as of January 1st, 2024, then you should complete an Annual Assessment no earlier than December 2nd, 2023 and no later than January 31st, 2024.

For Group/Family Enrollments: Every member will have their annual assessments conducted based on the HoH's project start date, if the members are still active as of one year after their Start Date.

For additional information please review: [Status and Annual Assessments](#) & [Annual Assessment Due Report](#)

Project Performance Report

The Project Performance Report (PPR) for Homeless Prevention 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](#)

Permanent Supportive Housing and Other Permanent Housing PPR draft data will be uploaded into DropBox within the first week of March.

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, May 8th at 10am.

Resources and Training

The [HMIS Website](#) includes posting of upcoming community training and resources.

- [Client-Centered and Trauma-Informed Data Collection](#)
- [2024 HUD Innovations in Ending Homelessness Roundtable Series](#)
- [2024 VAWA and Survivor Housing Community Conversations: Building System-Wide Partnership](#)

Q&A

Managing Household Composition Changes in the CES

- Q: If a client is not allowed to return to a specific shelter, where do we document that when adding the bed reservation?
 - A: The HMIS Helpdesk Team reached out to the Office of Care Coordination for additional guidance on this question. The recommendation is for people unable to return to a specific shelter, to include the information in the bed reservation assessment under special needs and in the referral note. Please include the date that the participant is eligible to return to the shelter (i.e. participant is ineligible to return to “Emergency Shelter” until 4/15/24). All information should be documented in HMIS and not sent by email.
- Q: How long are the homeless self-verifications and third party verifications valid?
 - A: The HMIS Helpdesk Team reached out to the Office of Care Coordination for additional guidance on this question. The Office of Care Coordination offered the following guidance: Verification of homelessness does not have an expiration date. For people experiencing homelessness, verification of homelessness must be provided for every CES program entry to verify eligibility at the time of program enrollment into CES. CES documents and resources, including a template verification of homelessness, are available [here](#).
- Q: Can you also confirm the prioritization of clients for shelter? And housing?
 - A: Please review the [CES Policies and Procedures, page 13 - Prioritization](#) additional information about prioritization.

From the CES Policies and Procedures: All services, shelter and housing opportunities available through CES, except survivor-specific resources, will prioritize chronically homeless individuals and families as defined in 24 CFR 578.3 that are the most appropriate and eligible referral to the available resource. Chronically homeless individuals and families with the longest length of the current episode of homelessness and with the most significant service needs will be prioritized over chronically homeless individuals and families with shorter lengths of homelessness and less significant needs following the prioritization process described above. Case conferencing amongst the CES participating agencies will occur as needed to ensure that the available resource best meets the needs of the individual or family being prioritized by the CES prioritization policy.

Survivor-specific resources will prioritize survivors with the highest score on the Survivor Assessment who are interested and eligible for the available survivor-specific housing resource.

- Q: I am currently taking the role to support with HMIS and CES at my agency. Would you mind letting me know which role the housing authority (who provides permanent housing) plays? So I know what I need to do whenever there is a change.
 - A: Housing Authority would be the housing provider. In the examples of changes to household composition, the Housing Authority would exit the household from CES once they are moved into the housing project. For additional information about the role of Housing Provider in the CES workflow, please review the [Community Queue for Housing Agencies](#) KB.

HMIS Recertification

- Q: Is there a report we can run to see staff who need to be recertified?
 - The HMIS Help Desk has sent out a spreadsheet with the users that needs to complete the HMIS Part 2 Recertification. If your agency did not receive a spreadsheet that means you do not have any users pending recertification.

Status and Annual Assessment

- Q: Where would one document a change in household composition on the status report? I see fields for disability and income changes, but I do not see a field for household composition change.
 - The Status Assessments are HUD based assessments so we are unable to make changes to questions on the assessment. Status and Annual assessments are used to record changes in income and disability, changes in household composition would occur when exiting clients and reviewing changes on the right hand side the different timelines members are participating in that program.



Future Meeting Information

April 2024 HMIS User Meeting Webinar

- Date: Wednesday, April 3rd, 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.