OC HMIS User Meeting Webinar Minutes
04/03/24

Contents

Agenda Items

HIC/Sheltered PIT Updates

The HMIS Team would like to thank all agencies for their ongoing support with the 2024 HIC and Sheltered PIT. Unfortunately there have been some system errors with HDX which prevented uploads. The schedule is updated to account for the delay, agencies will be receiving a follow up email to review the HDX data by Friday, April 26th.

HMIS Helpdesk Ticket Categories

There are new categories that have been added to the Submit a Ticket form. As a reminder **only agency administrators** should submit tickets on behalf of the agency.

The categories are:

- Agency or Project Setup - This is for new agencies and for adding new programs to existing agencies. Also for Bed inventory updates or custom field updates.
- Client Record Merges - This is for client profile merges or client program merges.

- Client Record Request - When a client requests a copy of their HMIS information.
- HMIS Functionality Issues - If you are unable to perform an action in HMIS.
- Reports (including repository reports and corrections) - You need help with creation of a new report or changes to existing reports.
- Users and Training - If you have questions about a user's account, resetting the training courses, or trouble logging into the training account.

Table of Functionalities - Access Roles

Each access role has the functionalities listed from the previous access role as you move right to left.

For example the HMIS Agency Admin will have access to all the functionality listed for HMIS Agency Staff in addition to specific access role rights for the HMIS Agency Admin account role.

<u>HMIS Agency Staff</u>

- Access Rights: Client Profile and Historic Data
- Edit Rights: Client Profile, Agency Services, and Assessments
- Delete Rights: Agency Services

<u>CES Access (Approval Required)</u>

- Create Rights: Access Point: Create referrals and send referrals to Community Queue.

  Housing Providers: Create Housing Opportunities

- Delete Rights: Agency Admin with CES access can delete files

<u>HMIS Agency Admin</u>

- Delete Rights: Agency Services, Programs files, Client Notes and Assessments

<u>HMIS System Admin</u>

- Create Rights: Referral Linkage, Merging Client Profiles, Program Moves and Support with Referral Edits

Deleting Program Enrollments

If you do not see the trash icon when hovering over the program enrollment, it is most likely there are services attached to the enrollment. You will first need to delete the services.

- Step 1: Navigate to the History tab, and hover to the left of the service you wish to delete until the Trash icon appears and then select it.
- Step 2: After you click on the Trash icon you will get the following message, click OK and the service will be deleted.
- Step 3: Proceed with deleting the program enrollment

Client Profile Merges

After a client profile is merged in HMIS, you should check the Program Enrollments to ensure that there are no duplicate enrollments for clients. If you find that there are duplicate enrollments, your agency administrator can delete the enrollment. For more information on deleting a program enrollment please review the following knowledge base article, Deleting Program Enrollment

Residence Prior to Entry

Data element 3.917 referring to a client's Prior Living Situation is collected from the Head of Household and Adults at the project start, and should reflect where the client was as of the night before their Project Start Date, not where the client was on the date the information is being collected. Users should take careful note not to confuse the client's prior living situation with their living situation prior to their current episode of homelessness.

Street Outreach Exiting Protocol

Clients should be exited from Street Outreach (SO) projects when they become housed in the projects they were referred to. The exit destination should reflect the appropriate project type they were referred to.

- Clients referred to an Emergency Shelter (ES) or Transitional Housing (TH) project should be exited on the date the client is enrolled into either the ES or TH project.
- Clients referred to Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH) or Other Permanent Housing (OPH) projects should be exited on the date coinciding with that referral project's Housing Move-In Date
- If staff cannot make contact with a client within 60 days of the last contact date, then the exit date should be set to the date the client last received services and not the date staff is processing the exit. The exit destination should be set to "No Exit Interview Completed"

CES Referral Updates

We wanted to highlight a scenario that was brought up in our last User Meeting. If a client is not allowed to return to a specific shelter, where do we document that when adding the bed reservation?

The recommendation is for participants 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.

HMIS Account Update Form

We have updated the HMIS Account Update & Testing Form for Read Only users that would like to be included in the CES Meeting mailing list. The form was changed again to make things more streamlined for the CES Leads.

As a reminder, the Read Only users will need to take the Coordinated Entry System training course but they **will not** be granted additional agency access to the County of Orange. The users will be added to the CES mailing list only.

Client Consent Form Update

The final page of the HMIS Consent to Share Protected Personal Information Form has been updated to reflect changes in the roster of HMIS participating agencies.

This form can be found on our website by navigating to: HMIS Forms and Documents > HMIS Policy and Privacy Forms > Consent to Share Protected Personal Information

A complete list of all entities that participate in the HMIS is maintained on the website.

Project Performance Report

The Project Performance Report (PPR) for Permanent Supportive Housing (PSH) and Other Permanent Housing (OPH) will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found on the Orange County HMIS website by navigating to: Reports > Project Performance Reports

Corrections for Rapid Re-Housing PPR draft data will be sent out in the upcoming weeks.

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

The HMIS Website includes posting of upcoming community training and resources.

- Trauma Informed and Equitable Approaches to Data Collection for HMIS
- Housing First: Still the Right Way to End Homelessness April 04, 2024
- Building a Better Emergency Transfer Plan April 18, 2024

Q&A

Table of Functionalities - Access Roles

- Q: What access rights do Read Only users have?
  - A: Read Only users do not have any functionalities in HMIS. They cannot make any edits or run reports. They can only review data that is entered. Such as under the history tab they can review services, CES referral and data entered in.

HMIS Account Update Form

After additional review and discussion, the HMIS Account Update Form will not be updated. The CES approval section is sufficient for the CES Leads and HMIS Team to process requests.

- Q: What about adding the TAY Match Meeting mailing list to the form?
  - A: The TAY or Veterans Match Meeting mailing list is an option when the user is approved for Individual CES access or Match Meeting mailing list. The email the user receives after approval has the option to select what Match Meeting they would like to attend for Individual, TAY, and Veteran meetings.

- Q: For access to the CES Match meetings for Read Only Access, the users need to complete CES Training but they don't have CES access.
  - A: Yes, for Read Only users if they need to attend the Match Meeting they will need to complete the CES Training course. The training course will provide an overview of CES so the user will have a foundation of the CES data they are reviewing.

Client Consent Form Update

- Q: Can a client revocation be submitted if the client refuses to sign it?
  - A: No, the client does have to sign the form to confirm they want to revoke their consent. For more information on Client Consent, please review this knowledge base article Refusing/Revoking Consent to Share Personal Information

Future Meeting Information

May 2024 HMIS User Meeting Webinar

- Date: Wednesday, May 1st, 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.