# Agenda

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2. HMIS Helpdesk Ticket Categories
3. Table of Functionalities - Access Roles
4. Deleting Program Enrollments
5. Client Profile Merges
6. Residence Prior to Entry
7. Street Outreach Exiting Protocol
8. CES Referral Updates
9. HMIS Account Update Form
10. Client Consent Form Update
11. Project Performance Reports
12. Resources
13. Q&A
14. Office Hours

# HIC/Sheltered PIT Updates

**<u>Update:</u>** There were system errors with HDX and the timeline will be adjusted. Agency Admins will receive a follow up email by Friday, April 26th.

Thank you all HIC PIT participating agencies for your ongoing support!

- All outstanding items finalized **EOD Wed, April 3rd**
  - Agencies received follow up items to review

- April 8th - Agencies will receive their final HIC PIT submission to compare to HDX upload
  - Provide confirmation by Wed, April 10th

- April 12th - HIC PIT HDX submission

# HMIS Helpdesk Ticket Categories

There are new categories that have been add 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
- Client Record Merges
- Client Record Request
- HMIS Functionality Issues
- Reports (including repository reports and corrections)
- Users and Training

## Ticket Details

Category*

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Agency or Project Setup

Client Record Merges

Client Record Request

HMIS Functionality Issues

Reports (Including repository exports and corrections)
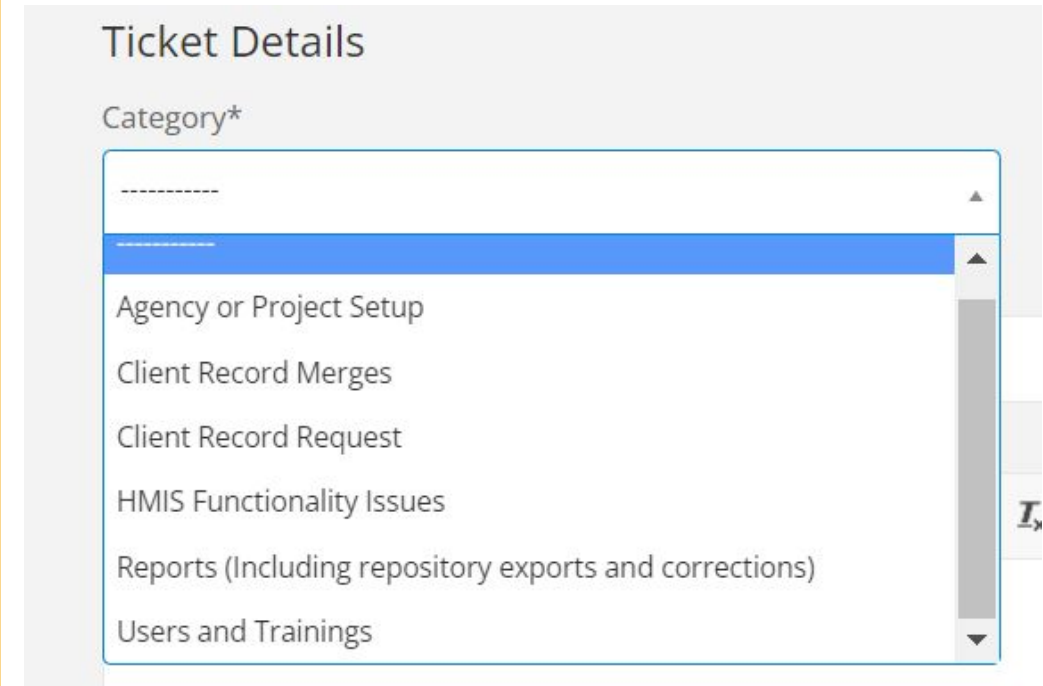
Users and Trainings

# 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 additional to specific access role rights for the HMIS Agency Admin account role.

| HMIS Agency Staff | CES Access (Approval Required) | HMIS Agency Admin | HMIS System Admin |
|---|---|---|---|
| **Access Rights:** History, Services, Programs, Public Alerts and Client Notes, Files, Attendance Services, Contacts, Assessments, Privacy, Manage Consent Refused Records, Client Reports, Report Library | **Create Rights:**<br>Access Point: Create referrals and send to Community Queue<br>Housing Providers: Create Housing Opportunities | **Delete Rights:** Agency - Services, Program, Program Files, Public Alerts and Client Notes, Files, Location, Assessments | **Create Rights:** Referral Linkage, Merage Client Profiles, Program Moves, Support with Referrel Edits |
| **Edit Rights:** Client Profile, Any Client Profile<br>Agency: Services, Program Files, Location, Contacts, Assessments | Agency Admin: Delete Files | | |
| **Delete Rights:** Agency Services | | | |

# Deleting Program Enrollments

If you do not see the trash icon when hovering over the program enrollment, it is mostly 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.

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JOURNEY 100 TO
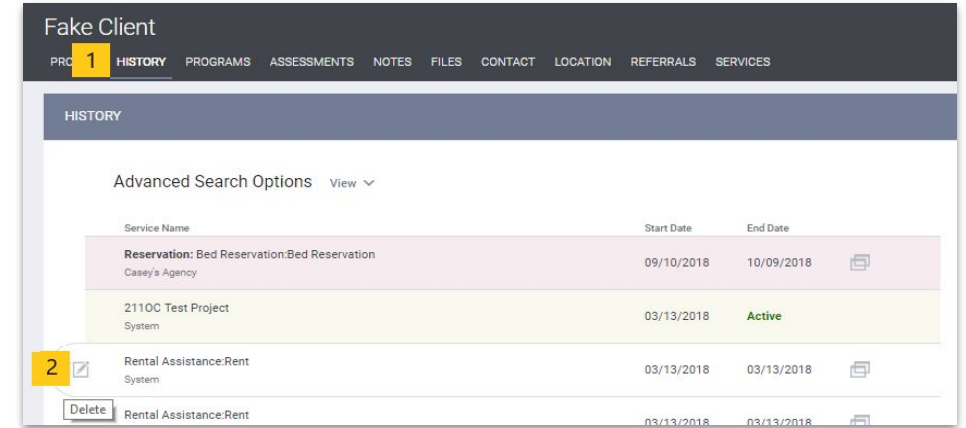
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# Client Profile Merges

After a client profile is merged in HMIS, you should check the Program Enrollments to ensure that there are no duplicate enrollments for client. 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



| PROGRAM HISTORY | | | |
|---|---|---|---|
| Program Name | Start Date | End Date | Type |
| Springfield RRH Project<br>Services Only<br>A Springfield Agency ⓘ | 03/28/2024 | Active | Individual |
| Springfield RRH Project<br>Services Only<br>A Springfield Agency ⓘ | 03/28/2024 | Active | Individual |

# Residence Prior to Entry

The HMIS Helpdesk team has notice an influx of data entry errors corresponding with data element 3.917 — Prior Living Situation.

Data 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.

More information about this topic can be found in our KB article, Residence Prior to Entry

# 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 the ES or TH project
- Clients referred to Rapid Re-Housing, Permanent Supportive Housing (PSH) or Other Permanent Housing (OPH) projects should be exited on the date coinciding with the 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 User Form Update

We have update 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 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 at:
http://ochmis.org/about-hmis/contributingagencies/





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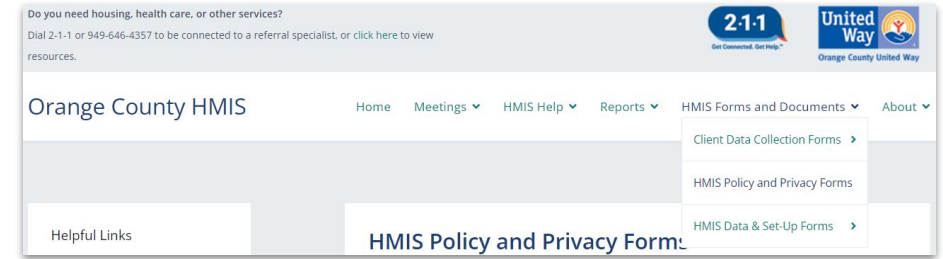
# Project Performance Reports

The Project Performance Report (PPR) for Permanent Supportive Housing and Other Permanent Housing 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

Corrections for Rapid Re-Housing PPR draft data will be published 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.

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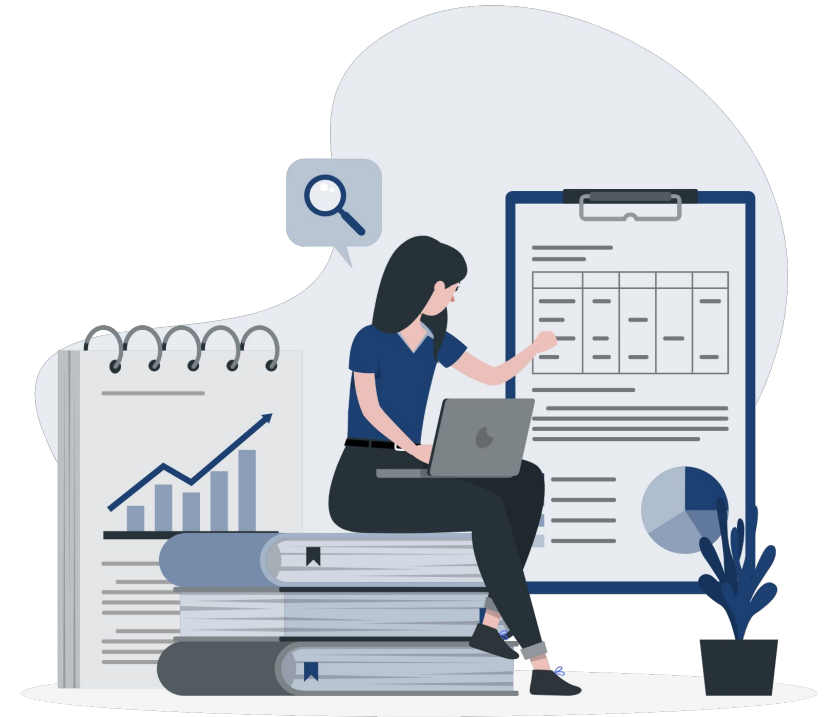
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# Resources and Training

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

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

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**