OC HMIS User Meeting Webinar Minutes
06/05/24

Contents

Agenda Items

LSA Overview

HUD requires CoCs to measure their performance as a system on an annual basis and submit the results to HUD. The reporting period is 10/01/2022 - 09/30/2023 and includes the following project types: Street Outreach, Emergency Shelter, Transitional Housing, Permanent Supportive Housing, Rapid Rehousing and Other Permanent Housing.

Report is available at ochmis.org > Reports > [LSA (Longitudinal Systems Analysis)]

HIC PIT Overview

The Point-in-Time (PIT) Count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. HUD requires that CoCs conduct an annual count of people experiencing homelessness who are sheltered in emergency shelter, transitional housing, and Safe Havens on a single night. CoCs also must conduct a count of unsheltered people experiencing homelessness every other year.

The Housing Inventory Count (HIC) is a point-in-time inventory of provider programs within a CoC that provide beds and units dedicated to serve people experiencing homelessness (and, for permanent housing projects, where homeless at entry, per the HUD homeless definition), categorized by five Program Types: Emergency Shelter; Transitional Housing; Rapid Re-housing; Safe Haven; and Permanent Supportive Housing.

Reports are available at ochmis.org > Reports > Housing Inventory Count (HIC) & Point In Time Count (PIT)

HIC PIT Survey

Thank you to all participating agencies for their support throughout the reporting period. The HMIS would like to invite participating agencies to share feedback regarding this year's HIC PIT review process. A newsletter with the survey will be sent out in a few weeks to Agency Admins.

HMIS Agency Audit

The HMIS Helpdesk Team will begin conducting agency audits for 2024.

We will reach out to your agency 2 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit. Please be on the lookout for our email to schedule your HMIS Agency Audit.

The following forms must be dated in 2024 and signed by leadership at the agency:

- Participating Agency Agreement
- Inter-Agency Data Sharing Agreement

You will need to review the attached files on the audit form. These reports contain information such as active users for your agency, active projects, current bed inventory, and users in your agency that are receiving correspondence from 211 OC.

Please review the reports and complete the audit form questionnaire 2 business days before your scheduled audit meeting.

For this year's audits, agencies will receive new reports to review to process corrections as needed:

- Overlapping Enrollments
- HoH Errors
- Duplicate Records

We will ask that Agency Administrators review the reports uploaded in your agency's DropBox prior to their scheduled audit meeting and submit tickets to the HMIS Helpdesk to address the errors.

Data Entry for Disabling Condition

The HMIS Helpdesk has observed instances where data entry for Disabling Condition have been entered incorrectly and causing errors:

Scenario 1: ‘Yes’ to Disabling Condition But ‘No’ to disability types

- Clients that have a ‘Yes’ response to the Disabling Condition field must have a ‘Yes’ response to at least one of the specific conditions and specified as a Long Term disability

Scenario 2: ‘No’ to Disabling Condition But ‘Yes’ to one of the disability types

- In instances where a disability is indicated and specified as ‘Yes’ to being Long Term, the main Disabling Condition field must also be indicated as ‘Yes’
- If the disability is indicated and specified as ‘No’ to being Long Term, the main Disabling Condition field must also be indicated as ‘No’

Exceptions for when Long Term does not need to be indicated occur when either the Developmental Disability or HIV - AIDS field are specified as ‘Yes.’

Please review the Disabling Condition Field Knowledge Base Article.

Data Accuracy and Timeliness

Data in HMIS is meant to reflect real information of clients in a consistent manner. To maintain good data quality users should focus on maintaining good data accuracy and data timeliness.

Data accuracy referring to the degree in which HMIS data reflects real-world clients and events is achieved by correctly entering real information clients provide into HMIS. This can be accomplished by:

- Verifying clients responses align with HUD data standards
- Verifying clients information provided reflects their real-life circumstances
- Verifying that information users enter into HMIS matches what clients report

Data timeliness referring to the degree in which data collected in HMIS is available for viewing is achieved by entering clients data into HMIS as soon as it’s collected. This can be accomplished by:

- Entering data into HMIS no later than 3 days after it has been initially collected
- Reviewing the Data Timeliness reports once a month and making changes to collection processes based on those reports

More information about this topic can be found in our Agency Administrator and Data Quality Training KB.

Reassigning Case Managers

Users who need to provide services to a client served by a partner agency will need to switch their agency access over to change the assigned staff to themselves.

1. Change your agency access from your primary agency over to your secondary agency using the agency drop-down menu
2. Search for the client's *Client Profile* record, and select the *edit* icon
3. Go to the client's *Program* tab and edit the Program by selecting the *edit* icon next to the enrollment.
4. Locate the *Assign Staff* section of the program, and click on the *edit* icon to the right of the name.
5. A drop down menu will appear that has a list of all the active staff at the agency. Choose yourself from among the list, and select *Save Changes*.

NOTE: Users who switch over to a partner agency will only be able to see a list of users at that agency. Agency Administrators will not be able to reassign case managers from one agency to another, case managers themselves must do so.

For more information about this topic, please review our Reassigning Case Managers KB article

Removing Households From the Community Queue

When a household no longer needs to be matched with a housing opportunity through CES, the household should be removed from the Community Queue.

1. Search for the Head of Household's name, and click on the *Edit* button. Once located, go to their *History* page.
2. Click the *Edit* button next to their *Referral to the Community Queue*.
3. Scroll to the *Remove from the Queue* section on the referral page, and select the reason the household is being removed. Remember to add the date the household was removed from the *Community Queue*, and click on *Save Changes*.
4. Navigate to the exit screen and close out the CES enrollment

CES Denial Data Entry

After a household has been matched to a housing opportunity, the agency may need to deny the referral. Some reasons this could occur is due to the household not being eligible for the project, the household deciding they did not want to be housed by the project, or the household fell out of contact with their case worker.

For example, if the Denied Reason is client refused services then the Denied by Type is Client. Review the section Denying a Referral within the Community Queue for Housing Agencies KB for additional details.

CES Clients Active with Service Provider & on CES CQ

This report lists all clients active in a project at the Service Provider's agency, and whether or not that client is currently on the Coordinated Entry Community Queue. The report includes the project name, project type, and project start and end dates for the client's current enrollment at the service provider's agency whether or not the client is on the CES CQ and the date they were added, as well as the client's responses to the CES assessment questions.

Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry > CES Clients Active with Service Provider & on CES CQ

CES Documents

The HMIS Helpdesk team has updated our website to include a page for users to quickly locate important CES documents. Users can find these documents on our website by navigating to HMIS Forms and Documents >> Client Data Collection Forms >> CES Documents

Other important CES partner documents and resources can be found on at the following web address: https://ceo.ocgov.com/page/ces-partner-documents-and-resources

CES Assessment Update

The CoC Board approved the addition of Accessibility Questions to the CES Assessments. The updated forms are available on the OC HMIS Site.

- Individual Housing Needs Assessment
- Family Housing Needs Assessment

Project Performance Reports

The Project Performance Report (PPR) for Transitional 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: Reports > Project Performance Reports

Corrections for the Emergency Shelter PPR draft data will be uploaded into DropBox 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.

Resources

The HUD Exchange has launched its Unsheltered Homelessness resource collection which provides assistance materials to providers who serve households who experience unsheltered homelessness. Some featured resources available of note are:

- Lessons Learned from Outreach Workers
- Unsheltered Data Collection Strategies: Case Studies
- Housing-focused Street Outreach Webinar Series: Building Blocks

In addition, the HUD Exchange is also hosting its Rapid-Rehousing: A Proven Approach to End Homelessness Webinar on June 20th, at 3:00 - 4:30 PM E.T./12:00 - 1:30pm P.T.

Holiday

The HMIS Help Desk will be closed on Thursday, July 4th in observance of Fourth of July. We will be back in the office the following business day to assist you on Friday, July 5th.

Q&A

Data Entry for Disabling Condition

- Q: Why have the disabling condition field at all? Can't it just pull data from the other fields and make the determination based on that?
  - A: The disabling condition field is a HUD required field. The field is used to indicate whether clients have a disabling condition as defined below. This data element is to be used with other information to identify whether a client meets the criteria for experiencing chronic homelessness.

CES Denial Data Entry

- Q: If you chose denied by the Housing Provider, would the options for Denied Reason be different?
  - A: The system is set up with the same pick list. The HMIS Team recommends that users review the Denied Reason table to determine if this is a Denied by Type of Client or Provider.

Future Meeting Information

July 2024 HMIS User Meeting Webinar

- Date: Wednesday, July 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.