

## OC HMIS User Meeting Webinar Minutes 07/03/24

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### Agenda Items

#### ***CES Assessment Forms - Translation***

The ICES & FCES Housing Needs Assessment forms translated in Spanish and Vietnamese have been updated and are currently available on our website.

HMIS Forms and Documents > Client Data Collection Forms > [CoC/ESG](#) or [CES Documents](#)

#### ***Updated HMIS Consent Form***

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:  
<https://ochmis.org/contributing-agencies/>

## ***HMIS Agency Audit***

The HMIS Helpdesk Team has begun 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 HMIS Helpdesk will collect digital signatures on the agreements below so we are asking that once the AA(s) receive the scheduling email they respond in a timely fashion and provide us with the Executive Director's email so that we can have the documentation sent directly to the Executive Director ASAP for signature. ED's signatures are due by the agency's scheduled audit date.

- [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
- Head of Household (HoH)/Enrollment Errors
- Duplicate Client 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.

## ***DQ Reports Review***

The Agency Audits will include Data Quality Reports but these reports can be run at any time of year to review any data entry errors your agency may have.

The first two reports can be found under Reports >> Data Analysis >> Built In Reports

- LSA Data Cleanup: Overlapping Enrollments - This report highlights clients that should not have overlapping residential projects enrollments. An overlap in residential projects enrollments would read as a client is physically in 2 beds at the same time. If a client was enrolled in two ES/SH/TH/PH projects simultaneously which could indicate either a potential programming error or that the client was not exited properly in HMIS.
- LSA Data Cleanup: Household and Enrollment Data - This report highlights a number of different issues with households and enrollments. Such as households that do not have a head of household. This could

have happened when a head of household was exited from the program and a new head of household was not assigned.

For more information, please review the [LSA Dashboards](#) knowledge base article.

The Duplicate Client Report can be found under Reports >> Report Library >> Data Quality Reports

Duplicate Clients Report - This report provides a list of potential [duplicate client profiles](#). The list is updated overnight for fresh data every 24 hours.

- The first step to adding a client profile is to [search](#) to see if a record already exists in HMIS. Multiple client profiles can be created if the user doesn't do a search for the client they are working with. If you find a client profile that should be merged, please submit a ticket to the [HMIS Help Desk](#).

### ***Helpdesk Ticket Reminder***

We have been receiving ticket submissions from non-agency administrators. If you have a question or an issue, please contact your HMIS Agency Administrator (AA). This is so HMIS AAs can assist users with any questions or concerns and are aware of any changes made to their program.

Things to keep in mind:

- Only Agency Admins should submit tickets to the HMIS Helpdesk
- Agency admins please provide all necessary details for the HMIS Helpdesk Team to support with your ticket
  - Report name, filters, [client ids](#)
    - Review to ensure that the clients' Personally Identifiable Information (PII) is not included in the ticket or attachments
  - If you need to submit a form refer to the links available on the [For Agencies/Projects Currently Set Up in HMIS](#)
- To request for a status update, please reply to the ticket you created to reduce duplicate tickets

### ***Project Set Up - Funding***

HMIS Team wanted to offer additional guidance to accurately set up your project's funding source.

- With more complex funding such as No Place Like Home (NPLH), the HMIS team will need information regarding the grant identifiers. If you have multiple funding sources, we will need to know if any of the grants require separate reporting.
- There are guides that offer additional information to support to ensure the eligible program component is selected per the funding source.
  - [Continuum of Care \(CoC\)](#)
  - [Emergency Solutions Grants Program \(ESG\)](#)
  - AB 977: [BCSH](#) & [HCD](#)

- There's an Additional Comments section on the form where you can identify information that would be helpful for the set up.

### ***Sage APR***

As of June 1, 2024, HUD will require that all APR submissions in Sage to include *Program Eligibility* form. This form uses the information uploaded in the APR CSV from Q15: Living Situation.

Since CoC, YHDP, and Special NOFO funded projects can only provide housing and services to clients who are experiencing homelessness [as defined by HUD](#), the new Program Eligibility form is meant to provide a prior explanation stating how client eligibility was determined for clients not experiencing homelessness.

More information about this topic can be found at the following link: [New Program Eligibility Form for APR in Sage](#)

### ***HMIS Part 2 Recertification***

The [2024 Recertification](#) schedule has been updated and will take place this summer for users that were added between the dates of 06/01/23-12/31/2023

- Agency Admins must submit the [2024 HMIS Part 2 Recertification Form](#) for their users by **August 30th** to avoid having their accounts locked until the Recertification is completed.
- Users with Read Only accounts or account accounts created on or after Jan 1st are excluded from this requirement.

Moving forward the HMIS Part 2 Recertifications will take place in July. Recertifications will resume the following year 2025 for all users.

Agency Admins can run the Agency Active Users report to review active users at their agency as needed: Data Analysis > User Management > Agency Active Users.

### ***HMIS Data Standards Interactive Tool***

This [interactive tool](#) is designed for Continuums of Care (CoCs), Homeless Management Information System (HMIS) Lead Agencies, HMIS Administrators, HMIS Users, and HMIS or Comparable Database vendors to help them understand the HMIS data elements that are required to be collected in an HMIS to meet participation and reporting requirements established by HUD and other federal partners at the Department of Veteran's Affairs (VA) and Department of Health and Human Services (HHS).

## ***DropBox Clean Up***

Bi-Annual DropBox Clean Up Schedule:

- July 2024
- January 2025

Please review your Agency's DropBox folder and download any files you will need for your records by Friday, July 19th. The HMIS Helpdesk will be removing all DropBox files on Monday, July 22nd. Thank you for your cooperation!

## ***Project Performance Reports Overview***

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.

Review Goal 10 - This measure includes two years of data instead of one. For example, if the reporting period for the report is 1/1/21 - 12/31/21, the reporting period for this measure would be 1/1/20 - 12/31/21. Clients are only included in this measure if they exit the project to any of the permanent housing destinations. Clients are considered to return to the homeless system if they have an enrollment in any of the project types excluding Homeless Prevention at **least 15 days after the permanent housing exit.**

## ***Project Performance Reports***

The Project Performance Report (PPR) for Emergency Shelter 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](#)

## ***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***

2024 HMIS Agency Audit

- Q: When do we know our scheduled audit meeting?
  - A: 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.

## Project Performance Reports Overview

- Q: Can you provide more information on why there are two years of data included in this goal if the other goals are just looking at one?
  - A: Goal 10 aligns with the HUD System Performance Measure and looks at the last 2 years of data to determine if a client is stabilized in housing. Also in the System Performance Measure, it looks at the client's exit then gives them at least a year to determine if there is a return. There is a wider time frame to see if the client is stabilized during that period.

## General Questions

- Q: Will these slides be available for us?
  - A: Yes they are posted on our website, under HMIS User Meeting Materials. The direct link to the materials is available on this link, [HMIS User Meeting Materials](#)

## ***Future Meeting Information***

### ***August 2024 HMIS User Meeting Webinar***

- Date: Wednesday, August 7th, 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.