

OC HMIS User Meeting Webinar Minutes 08/07/24

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Agenda Items

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

Data Entry - Social Security Number

Social Security Number (SSN) is collected to support the unique identification of each person served.

CoCs rely on unique identifiers to produce an unduplicated count in the HMIS. Also, an important objective for ending homelessness is to increase access and utilization of mainstream programs. SSN is a required data element for many mainstream programs, projects may need the SSN to help their clients access mainstream services.

- Data Collected About: **All Clients**
- Project Type Applicability: **All HMIS Project Type**
- Collection Point: **Record Creation**

NOTE: FY2024 PATH, CoC, and ESG Program-funded projects are only required to collect the last four digits of the SSN, though are not prohibited from collecting all nine digits.

Some projects may serve clients that do not have an SSN. In these cases, select “Client doesn't know”. The federal statute at 5 U.S.C. Section 522a prohibits a government agency from denying shelter or services to clients who refused to provide their SSN or do not know their SSN.

For additional guidance, please review the [HMIS Data Standards](#).

Clarity Site Update:

When a user enters an SSN for a client, the HMIS system will check to see if the SSN is valid.

A SSN is considered invalid if any of the following are true:

- The last four digits of the SSN are '0000'
- The first three digits are '000', '666', or start with '9'
- The middle digits (i.e., digits 4 and 5; the second grouping of digits) are '00'
- The digits are repetitive, like 000-00-0000, 111-11-1111, 333-33-3333, etc.
- The digits are sequential, like 123-45-6789 or 987-65-4321.

If the SSN is invalid, the system displays a warning pop-up:

- User can click **Cancel** and correct the SSN
- User can click **OK** to save invalid SSN

Clarity will now allow users to enter a non-numeric character for any digits of a client's Social Security Number that is unknown or refused by the client, and the system will automatically convert those non-numeric

characters to an “x.”

- If a non-numeric character is entered for all 9 digits of the SSN, the “Quality of SSN” field defaults to “Client doesn’t know” but is editable.
- If any digit in the SSN has a non-numeric character (such as xxx-45-6789, 123-xx-6789, 12x-x5-6789, 123-45-x789, etc.), and there are no more than 8 non-numeric characters in the SSN, the “Quality of SSN” field defaults to “Approximate or partial SSN reported” but is editable.
- If the ‘Consent Refused’ toggle is enabled in a client profile, Clarity will automatically convert the 0s for the SSN to ‘x’s when the profile is saved.

Q2 CoC Dashboard

The CoC Dashboard contains information on clients who were active in any project type in HMIS or who contacted 211OC for information and referral. The Quarter 2 CoC Dashboard has been published and is available on the OC HMIS website, [Orange County CoC Dashboard](#)

CES Referral Linkage

Users should regularly review all pending CES referral matches to their agency and process them accurately.

If a client has a CES referral pending but they are already enrolled in a housing project then an Agency Administrator should open a ticket with the HMIS Helpdesk to support in creating a linkage between programs.

CES Referral Corrections

An agency may need to deny a referral for various reasons including but not limited to: the household not being eligible for the project, the household declining housing, or the household falling out of contact with their caseworker.

- Users should consult the *Denied Reasoning* table to determine if the reasoning behind the denial lies with either the client or the housing provider.
- If a user identifies a referral error, they should notify their Agency Administrator who should then escalate the issue to HMIS Helpdesk.
- The HMIS Helpdesk will support Agency Administrators with recreating the CES referrals to record the accurate denial type and reasoning.

More information about this topic can be found in the *Denying a Referral* section of our [Community Queue for Housing Agencies](#) KB article.

Goal 11 - Project Performance Report

Goal 11 is a measure included for both Permanent Supportive Housing/Other Permanent Housing and Rapid Re-Housing PPR.

Permanent Housing projects should be receiving referrals from the Coordinated Entry System (CES) to ensure that the highest priority clients are receiving the housing resources they need to end their homelessness.

This measure is comparing the number of new enrollments in the housing project during the reporting period to the number of completed referrals the housing project had during the reporting period. Completed referrals means that a household was matched to a housing opportunity through the CES, and that match resulted in an enrollment in a housing project at that agency.

Agencies are recommended to run the Project Performance Report Dashboard and Details report to ensure their data is accurately recorded in Clarity.

Availability - Housing Opportunity Screen

Each housing agency is responsible for entering and updating any housing opportunities at their agency.

- Review the Housing Opportunity screen thoroughly
- Enter any criteria specific to the unit, or any preferences the project may have for matching clients

More information about this topic can be found in the *Adding and Editing Housing Opportunities* section of our [Community Queue for Housing Agencies](#) KB article.

Project Performance Report

Current and past PPRs can be found at on the Orange County HMIS website: OCHMIS Website> Reports > [Project Performance Reports](#)

Corrections for the Homelessness Prevention PPR draft data will be uploaded into DropBox by the end of the week.

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.

Data and Performance Management Meeting

The Quarterly Data and Performance Management Meeting will take place Wednesday, August 14th at 10am. Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

Agenda:

- Quarterly Project Performance Review and Discussion: Permanent Supportive Housing & Other Permanent Housing, Rapid Re-Housing and Transitional Housing.
- Quarterly Data Quality Report Card
- LSA System Map

Training & Resources

The Office of Care Coordination, on behalf of the Orange County Continuum of Care (CoC), is hosting upcoming training opportunities intended to equip service providers, local partners, and community members with information on resources and best practices for the homeless service system. Please find details below on the upcoming training opportunities.

- [Housing First Training](#) - Wed, Aug 21st, 1pm - 2:30pm
- [Trauma Informed Care Training](#) - Thurs, Aug 29th, 1pm - 2:30pm
 - This virtual training requires registration by Aug 28th.

Sage APR: As of June 1, 2024, HUD will require that all APR submissions in Sage to include Program Eligibility form.

- 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](#)

Holiday

The HMIS Help Desk will be closed on Monday, September 2nd in observance of Labor Day. We will be back in the office the following business day to assist you on Tuesday, September 3rd.

New HMIS Staff Position

The HMIS Helpdesk is hiring for an [HMIS Support Specialist](#).

Q&A

HMIS Part 2 Recertification

- Q: If we don't receive the email, we don't have to recertify?
 - A: Yes, if your HMIS Agency Admin did not receive an email in July with a list of users that are required to participate in the HMIS Part 2 Recertification then no further action is needed for this year's recertification. HMIS Agency Admin can review when users account were created by running the Agency Active Users report: Reports > Data Analysis > User Management > Agency Active Users
- Q: Has the email come out yet?
 - A: Yes, email reminders went out to HMIS Agency Admins on July 11th and August 8th for agencies that include users that are required to participate in the 2024 HMIS Part 2 Recertification.

Data Entry - Social Security Number

- Q: For this data reporting, if they provide the last 4, what would be the appropriate selection of "quality of SSN"?
 - A: For any partial social security number entered, the appropriate quality of SSN is Approximate or partial SSN reported - Any SSN other than a complete and valid 9-digit SSN, regardless of the reason, is provided. For additional guidance, please review the [HMIS Data Standards](#).
- Q: We serve households who are legal residents without a ssn - they have an id that does not match SSN format - what do we do in those instances.
Similar Q: Will ITINS be accepted?
 - A: The Social Security Number field is only to collect SSN. If the household doesn't have an SSN or doesn't know their SSN, the field should be left blank. The Quality of SSN of "Client doesn't know" - A client does not know or does not have an SSN, should be selected.
- Q: Does the "Quality of SSN" change if all zeros are entered?
 - A: Yes, Clarity will pop up the warning that the SSN: The SSN entered does not conform to Social Security Administration guidelines. Click 'Cancel' to change the SSN. Click 'OK' to proceed with the SSN entered. If you select OK, the Quality of SSN will be updated to Client doesn't know.
- Q: Do we have to go back and correct past SSNs to follow this new format if SSN was unknown?
 - A: The functionality is new to Clarity. The data entry requirement and quality of SSN is not new, this is a required HUD data standard field. Data quality review is an on-going process, we recommend as your agency is reviewing your data to correct the SSN when appropriate.

CES Referral

- Q: If a client is denied and the person enters in a reason, does the denial type (client/provider) automatically populate in the denial form? But somebody could potentially put in a client type denial as a provider denial?
 - A: No, the denied type needs to be manually entered and is the field that appears before the denial reason. The guidance is to review the Denial Reason table to know to select the appropriate denied by type and then the reason. More information about this topic can be found in the *Denying a Referral* section of our [Community Queue for Housing Agencies](#) KB article.

Project Performance Report - Goal 11

- Q: What report can I run to verify my clients have been referred through CES by Project?
 - A: Agencies can run the Project Performance Report dashboard and details report to further review their agency data. Pathway: Reports> Data Analysis > Project Performance Reports

Sage APR

- Q: This is for Heads of household only or all members in the household?
 - A: The living situation table reports on the living situation of adults and heads of households immediately prior to entering the project. Please review the [Sage Reporting Guidance](#) for additional information.

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

September 2024 HMIS User Meeting Webinar

- Date: Wednesday, September 4th, 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.