



Get Connected. Get Help.™

Welcome!

August 2024
OC HMIS User Meeting

JOURNEY 100 TO



Agenda

1. HMIS Part 2 Recertification
2. Data Entry - Social Security Number
3. Q2 CoC Dashboard
4. CES Referral Linkage
5. CES Referral Corrections
6. Goal 11: Receive Referrals from the Coordinated Entry System
7. Availability Tab - Housing Opportunities
8. Project Performance Report
9. Data and Performance Management Meeting
10. Training and Resources
11. Holiday
12. New HMIS Staff Position

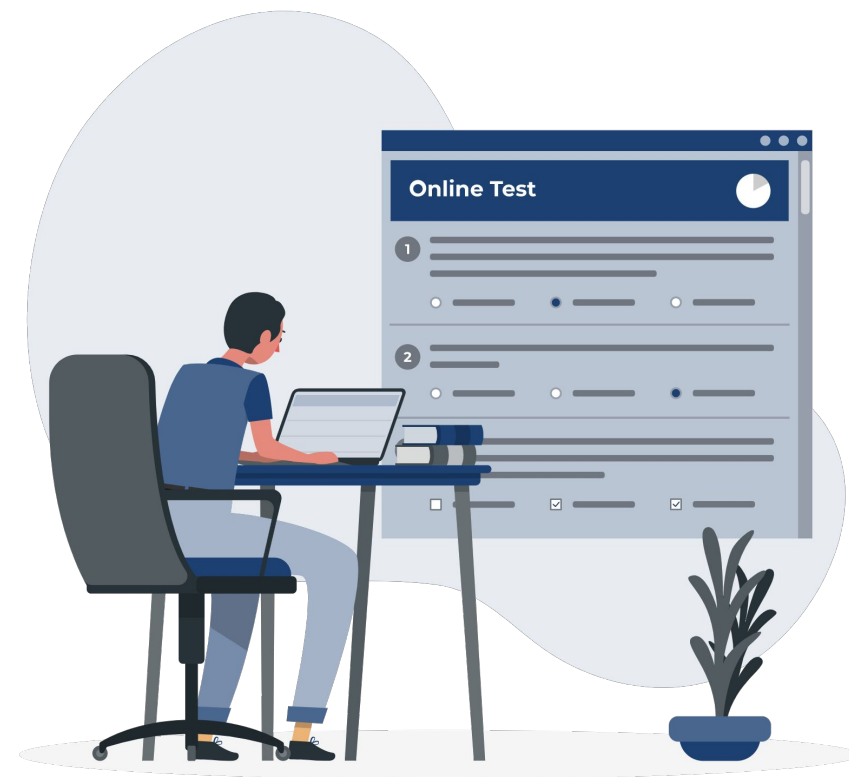
HMIS Part 2 Recertification

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.



Graphic by: <https://storyset.com/online>

Data Entry: 3.02 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.

Invalid Social Security Number (SSN) Warning

Release date: 8/12/24

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:

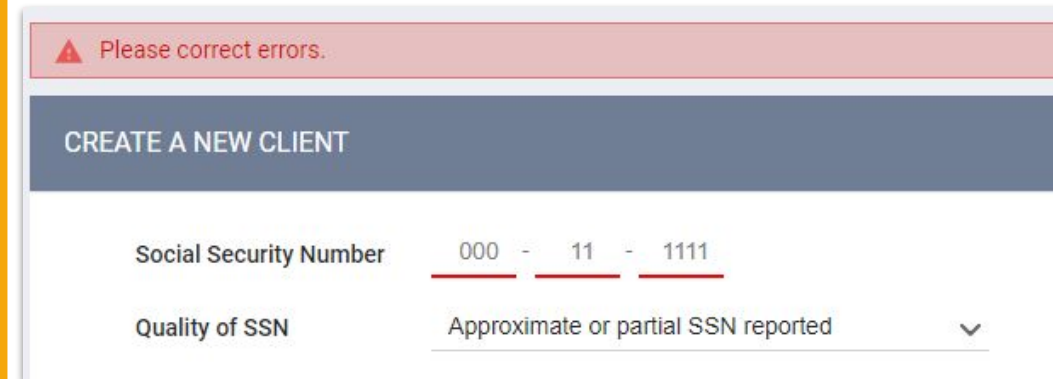
- The last four digits of the SSN are '0000'
- The first three digits are '000', '666', or start with '9'
- The middle digits (i.e., digits 4 and 5; the second grouping of digits) are '00'
- The digits are repetitive, like 000-00-0000, 111-11-1111, 333-33-3333, etc.
- The digits are sequential, like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



The screenshot shows a web browser window at octrain.clarityhs.com/client/profile/add. The page title is "OC Training Agency". A warning pop-up is displayed over the form, stating: "octrain.clarityhs.com says: 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." The form fields are: "Social Security Number" with the value "000 - 11 - 1111" and "Quality of SSN" with a dropdown menu set to "Approximate or partial SSN reported".



The screenshot shows the same web browser window, but with a red error message at the top: "Please correct errors." The form fields are: "Social Security Number" with the value "000 - 11 - 1111" and "Quality of SSN" with a dropdown menu set to "Approximate or partial SSN reported".

SSN - Allow Entry of Non-Numeric Characters for Unknown/Refused SSN Digits

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.

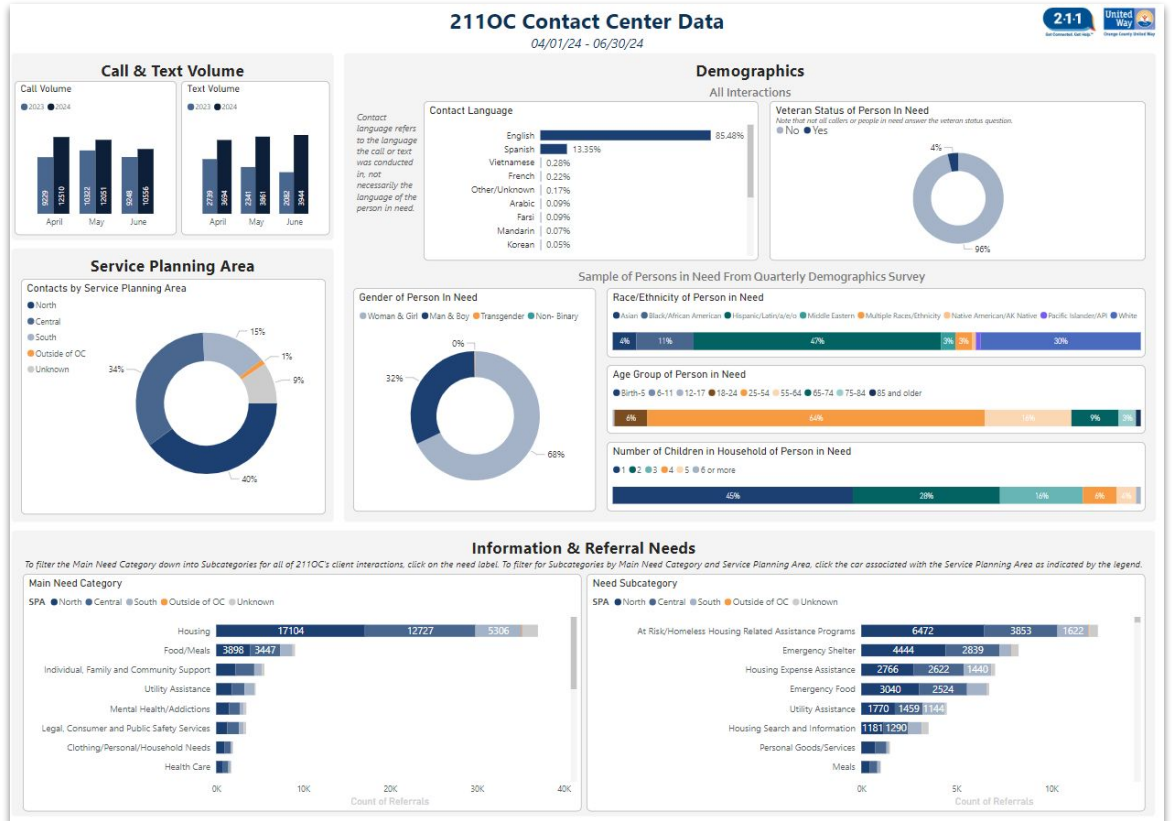
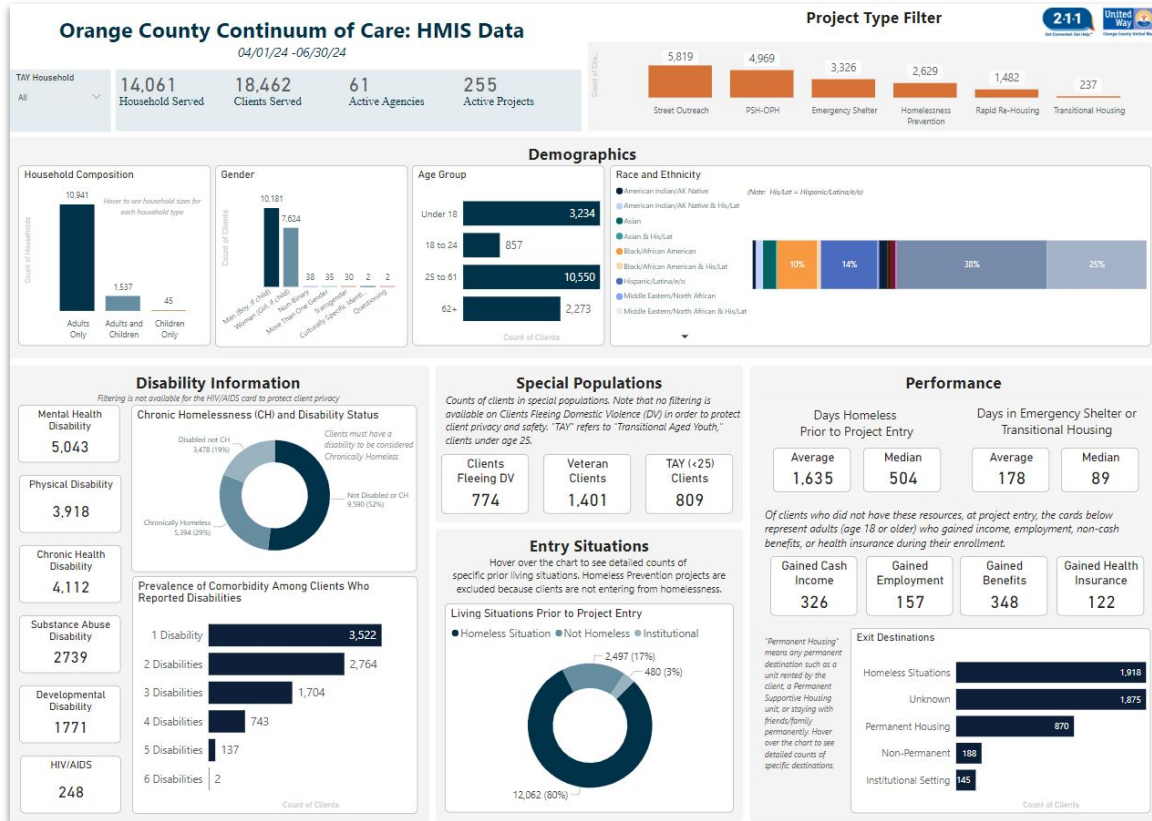
CLIENT PROFILE	
Social Security Number	xxx - xx - xxxx
Quality of SSN	Client doesn't know <input type="checkbox"/>

CLIENT PROFILE	
Social Security Number	xxx - 53 - 4865
Quality of SSN	Approximate or partial SSN reported <input type="checkbox"/>

CLIENT PROFILE	
Social Security Number	xxx - xx - xxxx
Quality of SSN	Client prefers not to answer <input type="checkbox"/>
Last Name	Refused
First Name	B469994CC
Quality of Name	Client prefers not to answer <input type="checkbox"/>

Q2 (April - June) CoC Dashboard Published

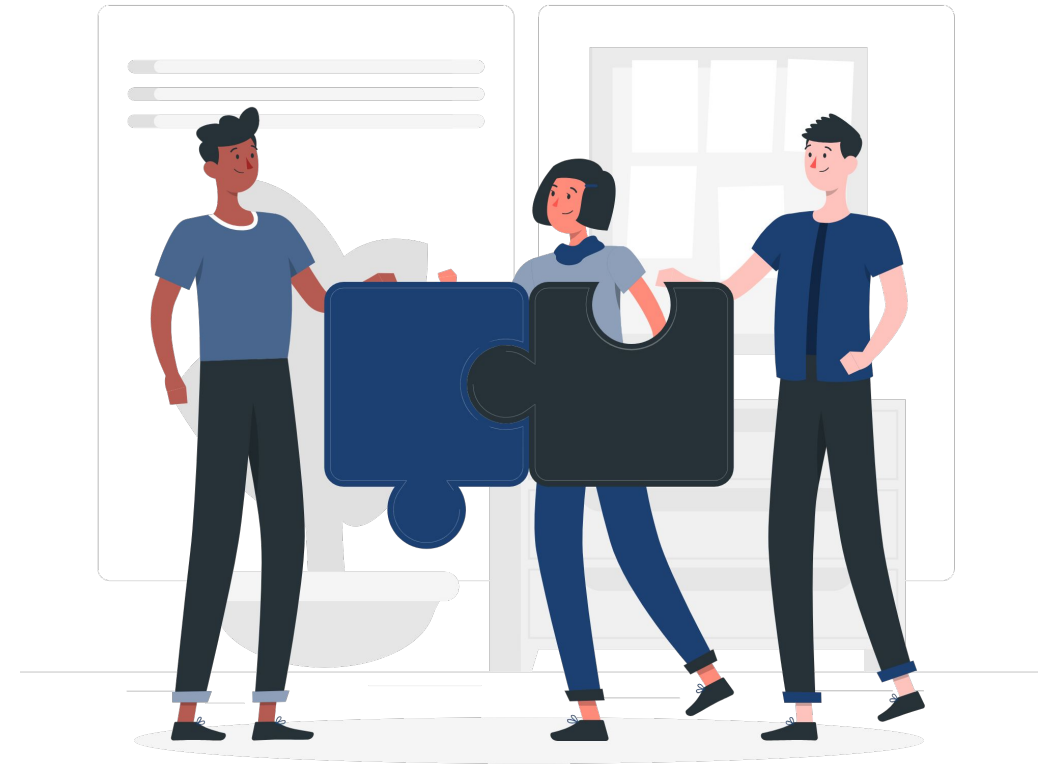
The new CoC Dashboard has been published on our website. Ochmis.org> Reports> [Orange County CoC Dashboard](#)



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 PH project then an Agency Admin should open a ticket with the HMIS Helpdesk to support in creating a linkage



Graphic by: <https://storyset.com/online>

CES Referral Linkage: Example

CES Referral Corrections

Users should regularly review their CES referrals to make sure that they are processed correctly

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 the client or the housing provider



Graphic by: <https://storvset.com/online>

CES Referral Corrections: Denied Reasoning

	Client	Housing Provider
Client Deceased	X	
Client did not show up or call	X	
Client out of Jurisdiction	X	
Client previously received service		X
Client refused services	X	
Denied by Landlord/Property Manager		X
Disagreement with rules	X	
Falsification of Documents	X	
Full Capacity/No Availability		X
Incorrect Match to Agency		X
Lack of Eligibility		X
Needs could not be met by program	X	
Referral time expired		X
Self Resolved - Client Housed	X	
Voucher expired	X	
Other	X	X

Common "Other" Reasons for Denial	Appropriate Reason for Denial
Non-compliance with requests for items/information	Disagreement with rules
No contact with client	Client did not show up or call
Client denied	Client refused services
Housing Opportunity is no longer available	Full Capacity/No Availability
Ineligible	Lack of Eligibility

CES Referral Corrections (2)

If a user identifies a referral error, they should notify their Agency Admin who should then escalate the issue to HMIS Helpdesk

The HMIS Helpdesk will support Agency Admins 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



Graphic by: <https://storvset.com/online>

Goal 11 - Receive Referrals from the Coordinated Entry System

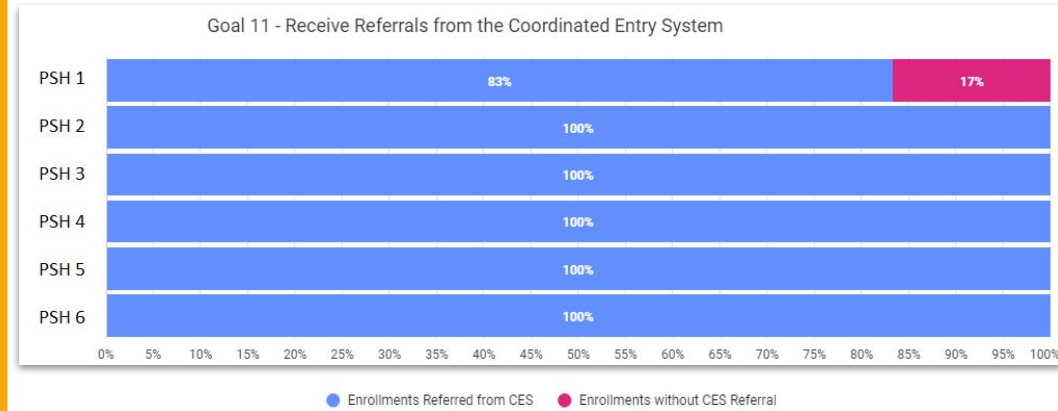
Goal: Permanent Housing projects should be receiving referrals from the Coordinated Entry System (CES) to ensure that the highest priority clients are receiving the housing resources they need to end their homelessness.

Universe: Heads of households with a Project Start Date during the reporting period.

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.

Clients entering from the following locations are excluded from this measure:

- Rental by client, with RRH or equivalent subsidy
- Permanent housing (other than RRH) for formerly homeless persons



Unique Identifier	Enrollment ID	Client Full Name	Program Name	Project Start Date	Project Exit Date	Date Referral Was Reassigned Date	Date Accepted In Program Date
12345abc	1125		PSH 1	8/4/2024			
67891def	1126		PSH 2	7/8/2024		6/15/2024	7/8/2024

The two highlighted date fields indicate if the program enrollment is linked to a CES referral.

If the participant was referred through CES, review to ensure a linkage is created to correct the error.

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

KB: [Community Queue for Housing Agencies](#)



Graphic by: <https://storyset.com/online>

Availability - Housing Opportunity Screen

ADD AN OPENING ✕

Date: 08/07/2024 


Additional Notes:

Anaheim Housing Authority Opportunity

Opportunity is for household with at least one child 5 years or younger

City Preference:

City Tied Required

Date unit must be occupied by 

Opportunity is for Family CES

Maximum size of household that can occupy unit:

Maximum size of household that can occupy unit:

Housing Development Property Name

Housing Unit Name

Opportunity is for Individual CES

MHSA Eligibility Required

Orange County Housing Authority Opportunity

Santa Ana Housing Authority Opportunity

Housing Opportunity SPA:

Opportunity is for Transitional Aged Youth (TAY), 18-24

Opportunity is for Veteran

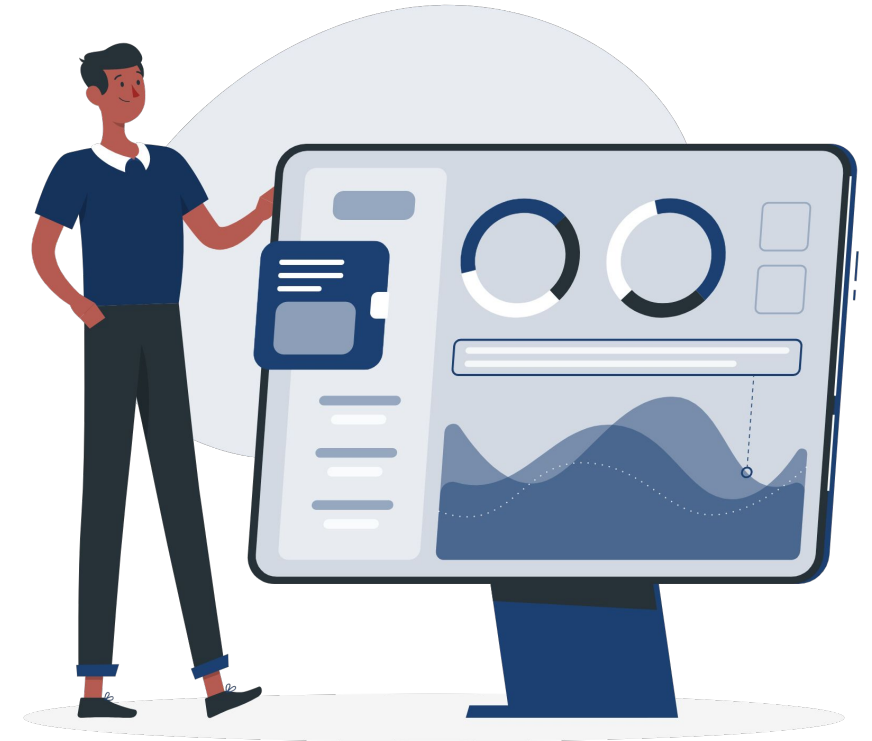
SAVE CHANGES **CANCEL**

Project Performance Reports

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.



Graphic by: <https://storyset.com/online>

Data and Performance Management Meeting

Agenda:

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

Wednesday, August 14th @ 10am - 11am

Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529



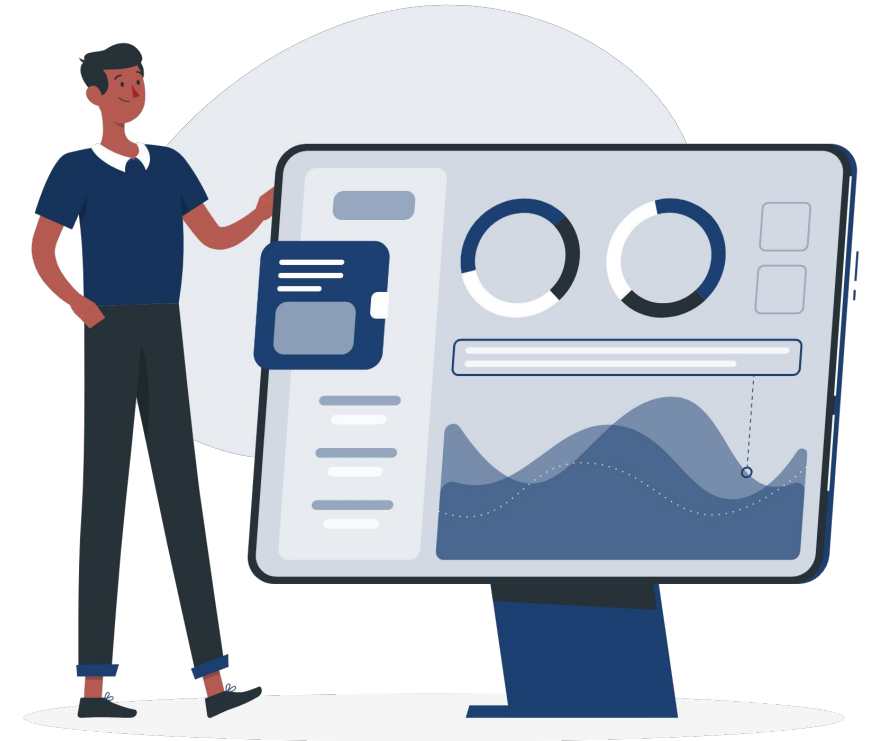
Graphic by: <https://storyset.com/online>



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.



Graphic by: <https://storyset.com/online>

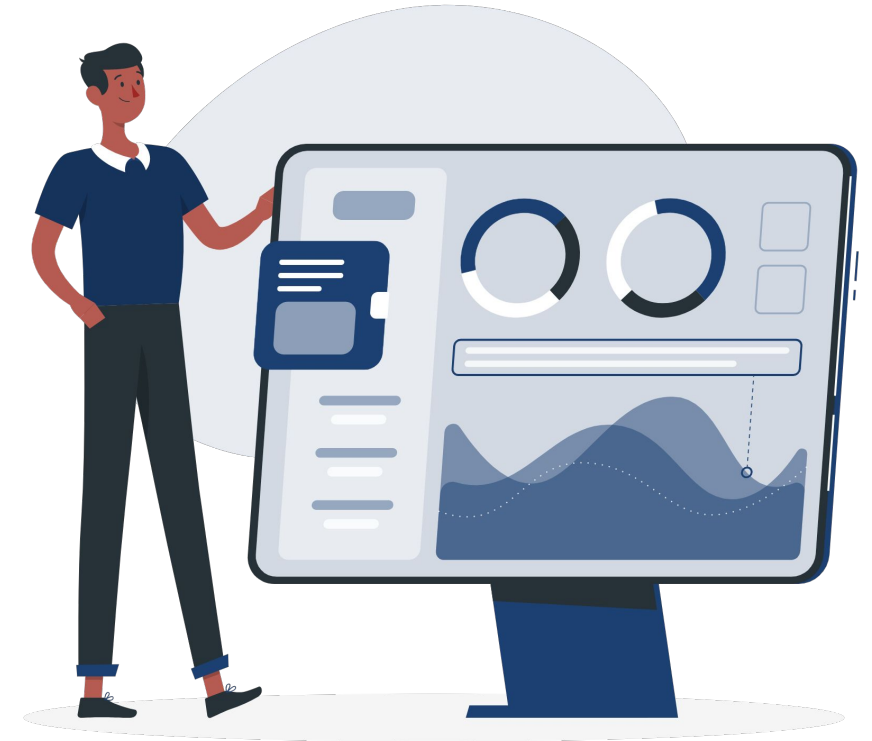
Training & Resources

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](#)



Graphic by: <https://storyset.com/online>

Holiday Observed

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**.



Graphic by: <https://storyset.com/online>

New HMIS Staff Position

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



Graphic by: <https://storyset.com/online>

Q&A

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



Thank you
Have a great day!

Next User Meeting: Sept 4th





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