OC HMIS User Meeting Webinar Minutes
09/04/24

Contents

Agenda Items

HMIS Policies and Procedures

The updates to the OC HMIS Policies and Procedures were reviewed and approved by the CoC Board during the August CoC Board meeting.

Updates include but not limited to the following:
- Agency Access Policy
  - Victim Service Providers receiving CoC Program funds or ESG Program funds may request up to five licenses for read-only access in HMIS for the purpose of care coordination. The provider will be required to pay the User Fee for 1 – 5 users as outlined in the Participating Agency Requirements section.
  - Organizations that submit the Agency Access Application will be required to complete an online course to understand HMIS requirements
  - Agencies approved for access must begin entering data into HMIS within 90 days of approval
- Agency Audits Policy
  - After 2 unsuccessful attempts to contact the agency the HMIS Lead Agency will reach out to the

agency's leadership.
  - If the agency remains unresponsive after attempting to contact the agency's leadership twice the agency will fail the audit for that year.
  - Agencies that fail their audit will be reviewed by the HMIS Access Ad Hoc to determine the appropriateness of the agency's continued participation in the OC HMIS, and the agency may have HMIS Access revoked.
  - Agencies that pass their HMIS Annual Audit will be recognized on the OC HMIS Website.
- User Licenses
  - Agencies may request standalone Looker licenses for the purposes of scheduling ad hoc reports to be sent to a secure location outside of HMIS. The fee for these licenses is $1,236 per license annually, and is subject to change per vendor licensing fee.
- Remote Work
  - Agency must adhere and be consistent with the agency's expectations of information security for staff working at the office full-time. Staff who work remotely will be expected to ensure the protection of proprietary agency and client information accessible from their remote office. Agency should be at a minimum in compliance with OC HMIS Technical Standards policies and the policies outlined in this document.
- Client Consent Form
  - Replace "entity" with "Service Provider/Organization"
- Participating Agency Requirements - Reporting
  - Last 10 days of January - Housing Inventory Count (HIC) and Point in Time Count (PIT)
  - Oct 1st to Sept 30th - System Performance Measures report (SPM)
  - Oct 1st to Sept 30th - Longitudinal Systems Analysis (LSA)
  - HMIS Participating Agencies Schedule

Please review the updated OC HMIS Policies and Procedures.

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.
- We are provided an extension for the deadline. Agency Admins must submit the 2024 HMIS Part 2 Recertification Form for their users by **September 20th** 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.

Client Personal Protected Information

Personally Identifiable Information (PII), also known as Protected Personal Information (PPI), is a category of sensitive information that is associated with an individual person. This information should be accessed only on a strict need-to-know basis, handled and stored with care.

This category includes but is not limited to:
- First Name & Last Name
- Date of Birth (DOB)
- Social Security Number (SSN)

Personally Identifiable Information should **never** be sent to the HMIS Help Desk through text of the ticket or an attached screenshot or other document. If you need to discuss a specific client only the client's HMIS Client Unique Identifier should be sent.

Agency Administrators who repeatedly submit client identifying information to the HMIS Help Desk may be subject to corrective action.

The easiest way to let the HMIS Help Desk know which client and enrollment you need help with is to send us the link to the client's enrollment.

You may also send the Client's Identifier (along with the name of the Program they are enrolled in and the Client's Program Start Date), which you can find on the Client's Profile page under the photo section on the Profile tab.

For more information on Client Personally Identifiable Information please refer to the following knowledge base article, Sending Client Information to the HMIS Help Desk

Program Move

When users mistakenly enroll a client in the wrong program Agency Admins can submit a ticket to the HMIS Helpdesk to perform a *Program Move*, and transfer that enrollment to the correct program **within the same agency**

Agency Admins should not request a *Program Move* for clients who need to transfer enrollments to continue receiving services due to funding constraints. Those clients should have two separate enrollments to maintain an accurate historical record of their enrollment history.

More information about this topic can be found in our Deleting Program Enrollment KB article

Funding and Program Enrollments

When a program's funding is on-going, Agency Admins should submit a ticket to the HMIS Helpdesk at the start of every new fiscal year detailing any new updates or changes that need to be made to their funding sources

If a program's funding has ended and will not be updated, Agency Admins should submit a Project Close Out Form to the HMIS Helpdesk to make the program inactive

Clients should only be exited from a program when they are no longer participating in the program. Clients should not be exited from an active program due to updates or changes in funding.

Agency Admins should periodically review the Agency Set Up Dashboard to ensure that their funding sources are active and up-to-date. More information about this topic can be found in our Agency Set-Up Review Dashboard KB Article.

Delete Program Enrollment

In some cases, a client may have duplicate enrollments due to a client profile merge or data entry error. The user will need to reach out to their
Agency Administrator to assist with deleting the duplicate program enrollment. Please keep in mind that only Agency Administrators have access to the *Delete* option. Please review the following information below to learn how to do this.

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

HMIS Agency Audit

The HMIS Helpdesk Team is currently conducting agency audits for 2024. If your agency has not participated in an audit this year, please be on the lookout for our email to schedule your Agency Audit.

This process kicks off in the summer and ends in the winter as we audit all active HMIS agencies and partners using comparable databases with CoC/ESG funds.

We will need AAs to provide confirmation of the meeting date and Executive Directors contact information for electronic signatures of the agreement this year.

There are reports attached to the form and in your agency's DropBox for review.

Survivor CES Referral

This process is for clients on the Survivor CES Community Queue (CQ) that have been matched to a housing opportunity through Individual CES or Family CES (OC CES). This means that the client has been matched to a housing opportunity at a Housing Provider that is not a Victim Services Provider, and the Housing Provider is participating in HMIS.

Please review the Knowledge Base article and Flowchart for additional details and steps to process Survivor CES referrals:

- Survivor CES Workflow for Housing Agencies
- Survivor CES Flowchart

Project Performance Report

Current and past PPRs can be found on the Orange County HMIS website: OCHMIS Website> Reports > Project Performance Reports.

Corrections for the Permanent Supportive Housing & Other Permanent Housing 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.

Current and past PPRs can be found on the Orange County HMIS website: OCHMIS Website> Reports > Project Performance Reports.

Training and 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.

- HUD's Equal Access Rule - Mon, Sept 9th, 10am - 11am
- Social Services Agency (SSA) Overview Presentation - Thurs, Sept 12th, 10am - 11am

HUD hosted webinar: Implementing HUD's Equal Access Rule in Emergency Shelters - Thurs, Sept 12th, 9am - 10:30am

These resources are posted on our website, Orange County HMIS website so you can stay up to date on the announcements by reviewing the posting.

New HMIS Staff Position

The HMIS Helpdesk is hiring for an HMIS Support Specialist.

Q&A

Funding and Program Enrollments

- Q: For projects that are funded this year but the grant ID changes, do we need to update the project?
    - A: To clarify that projects that receive ongoing funding should not be closed out and the clients should remain active. The funding should be updated until that grant ends.

Program Move

- Q: Does this move include services and assessments? What if a program has a service type that the new program does not have?
    - A: Yes, the services and assessments will be moved. It will keep the historic data from the program. If the program has a service type that the new program does not have, the historic service will be visible but you will be unable to add any notes to that service since it is not available in the program.

- Q: What's the benefit of requesting a program move vs exiting and enrolling in the correct program?
    - A: The program move will reduce data entry for users. The move will transfer all the enrollment data and services to the correct program. This is only for program enrollments that were created in error.

- Q: If a client is enrolled in another program and they have lost contact with that agency should we request that the client be moved to our program since we are engaged with them.
    - A: The program move is only available under your agency. You would leave that historical data for the enrollment at the other agency and you would enroll them into the program at your agency.

Future Meeting Information

October 2024 HMIS User Meeting Webinar

- Date: Wednesday,October 2nd, 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.