



Get Connected. Get Help.™

Welcome!

September 2024
OC HMIS User Meeting

JOURNEY 100 TO



Agenda

1. HMIS Policies and Procedures
2. HMIS Part 2 Recertification
3. Personally Identifiable Information
4. Program Move
5. Funding and Program Enrollments
6. Deleting Program Enrollment
7. HMIS Agency Audit
8. Survivor CES Workflow
9. Project Performance Report

HMIS Policies and Procedures (HMIS P&P)

- [OC HMIS Policies and Procedures](#) updates approved at [Aug CoC Board Meeting](#)
- Thank you to the HMIS Working Group Members:
 - Last is First Philanthropies
 - PATH
 - Pathways of Hope
 - Salvation Army
 - U.S. Veterans Initiative
 - Families Forward
 - Family Assistance Ministries
 - Mental Health Association
 - Mercy House
- Also thank you to users that provide feedback from the listening session

Updates to HMIS Policies and Procedures

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



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

Updates to HMIS Policies and Procedures

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.



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

Updates to HMIS Policies and Procedures

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.



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

Updates to HMIS Policies and Procedures

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](#)



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

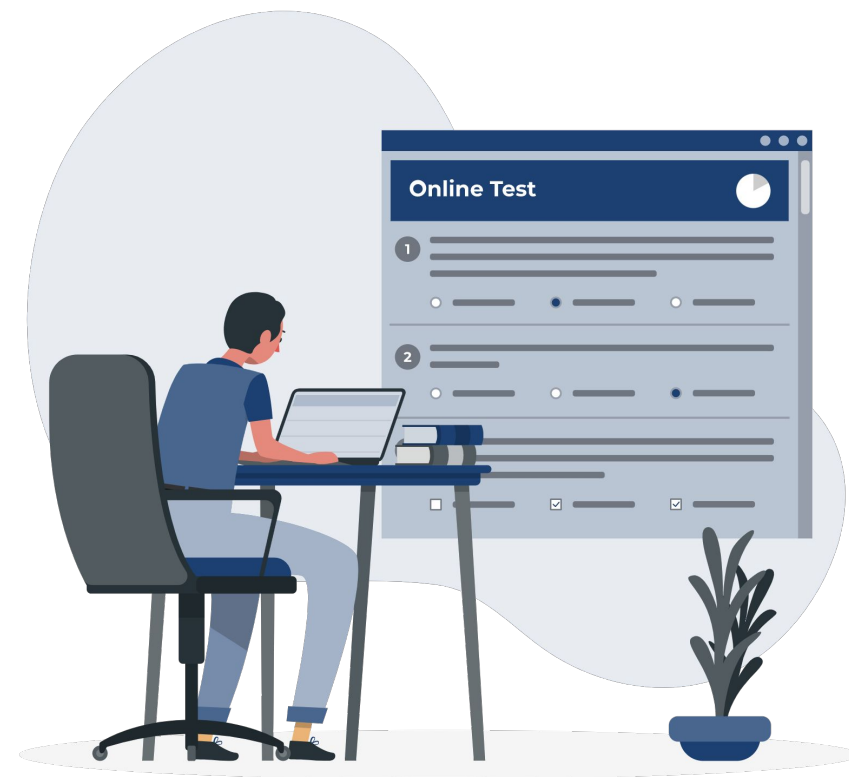
HMIS Part 2 Recertification

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.



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

Personally Identifiable Information

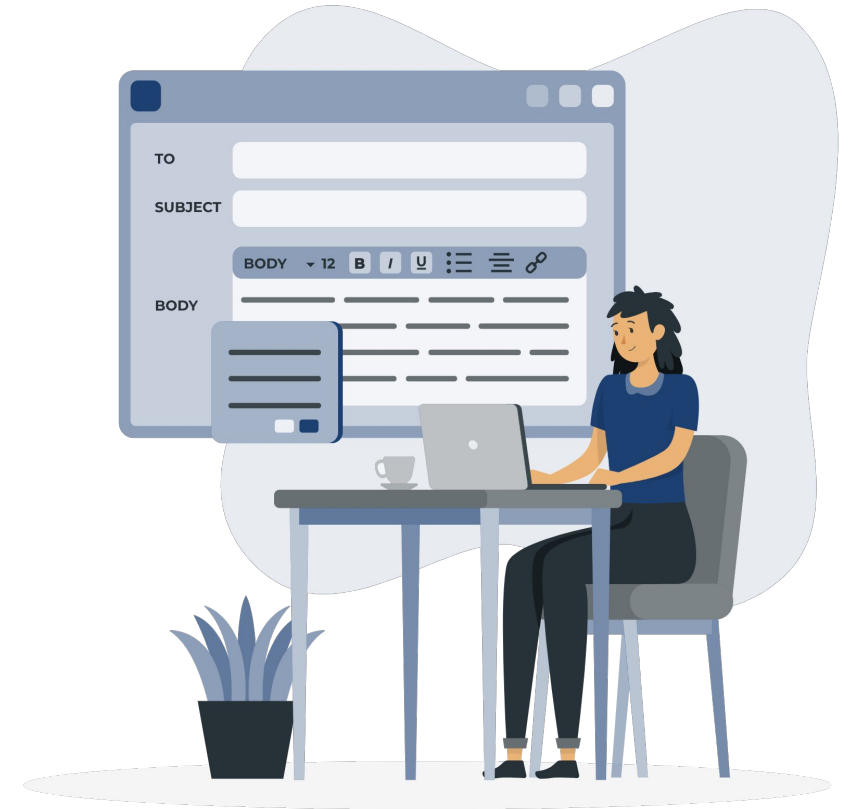
Personally Identifiable Information (PII), also known as Protected Personal Information (PPI), is a category of sensitive information that is associated with an individual person. This information should be accessed only on a strict need-to-know basis, handled and stored with care.

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.



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

Personally Identifiable Information

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](#)

The screenshot shows a web browser window with the URL <https://octrain.clarityhs.com/clients/99/program/16079/enroll> highlighted in a yellow box. The page title is "Marge Simpson" and the navigation menu includes PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, FILES, SERVICES, CONTACT, and LOCATION. The main content area shows "PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM" and a tabbed interface with "Enrollment" selected. Below the tabs, it says "Enroll Program for client Marge Simpson" and "Project Start Date" is 12/01/2022. The "CLIENT PROFILE" section lists various fields: Social Security Number (XXX-XX-1968), Quality of SSN (Full SSN Reported), Last Name (Simpson), First Name (Marge), Quality of Name (Full name reported), Quality of DOB (Full DOB Reported), and Date of Birth (02/01/1965). An "Adult. Age: 58" is also shown. A cartoon image of Marge Simpson is on the right. A yellow box highlights the "UNIQUE IDENTIFIER A0036C0F5" with an arrow pointing to it.

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.



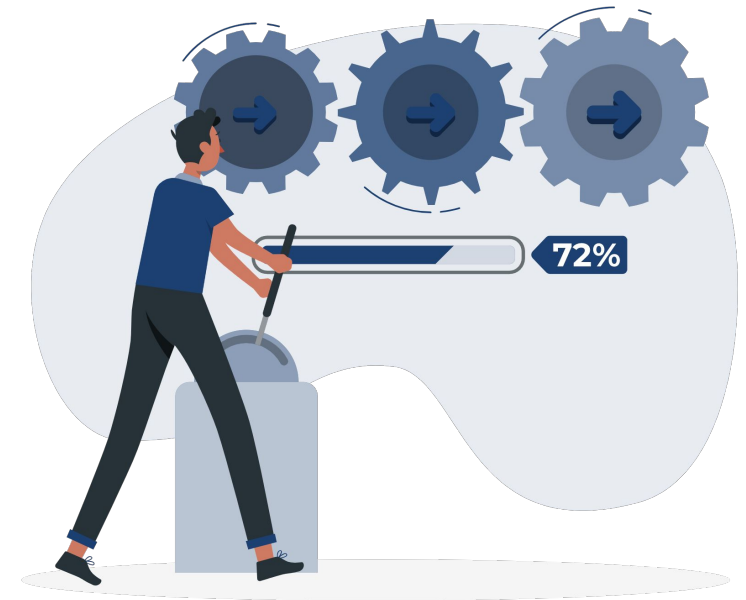
Graphic by: <https://storyset.com/online>

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



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

Program Move (Cont.)

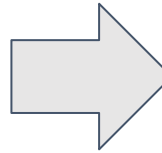
Before

Phoenix Wright

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
CoC Funded Transitional Housing Training Project Transitional Housing OC Training Agency ⓘ	09/01/2024	Active	Individual
Individual Coordinated Entry System Coordinated Entry County of Orange ⓘ	08/06/2024	Active	Individual
CoC Funded Permanent Supportive Housing Training Project PH – Permanent Supportive Housing (disability required for entry) OC Training Agency ⓘ	08/06/2024	Active	Individual



After

Phoenix Wright

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Non-Federally Funded Transitional Housing Training Project Transitional Housing OC Training Agency ⓘ	09/01/2024	Active	Individual
Individual Coordinated Entry System Coordinated Entry County of Orange ⓘ	08/06/2024	Active	Individual
CoC Funded Permanent Supportive Housing Training Project PH – Permanent Supportive Housing (disability required for entry) OC Training Agency ⓘ	08/06/2024	Active	Individual



PROGRAM **CO C FUNDED TRANSITIONAL HOUSING TRAINING PROJECT**

2 DAYS ACTIVE PROGRAM

Program Type: Individual
Program Start Date: 09/01/2024
Assigned Staff: Hugo Ambriz
Head of Household: Phoenix Wright

Enrollment History Provide Services Assessments Goals **Notes** Files Forms X Exit

Client Program Notes

Title	Category	Staff	Date
Client Note 1 OC Training Agency ⓘ	Case Management	Hugo Ambriz	09/01/2024

Client is requesting hair gel.

PROGRAM **NON-FEDERALLY FUNDED TRANSITIONAL HOUSING TRAINING PROJECT**

2 DAYS ACTIVE PROGRAM

Program Type: Individual
Program Start Date: 09/01/2024
Assigned Staff: Hugo Ambriz
Head of Household: Phoenix Wright

Enrollment History Provide Services Assessments **Notes** Files Forms X Exit

Client Program Notes

Title	Category	Staff	Date
Client Note 1 OC Training Agency ⓘ	Case Management	Hugo Ambriz	09/01/2024

Client is requesting hair gel.

Deleting Duplicate Program Enrollments

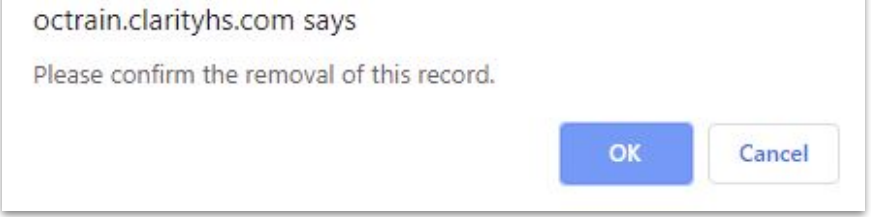
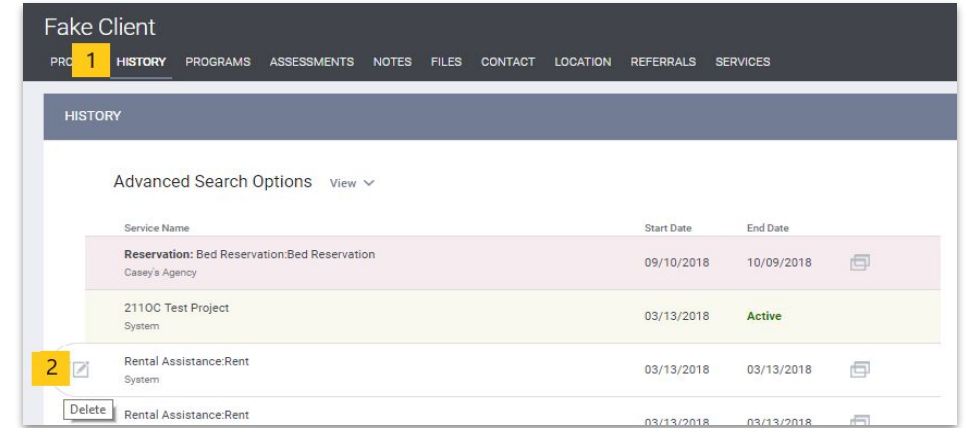
In some cases, a client may have duplicate enrollments due to a client profile merge or data entry error. The user will need to reach out to their Agency Administrator to assist with deleting the duplicate program enrollment. Please keep in mind that only Agency Administrators have access to the *Delete*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

Step 3: Proceed with [deleting the program enrollment](#).



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

Deleting Duplicate Program Enrollment Demo

2024 HMIS Agency Audits

- 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.



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

Survivor CES Workflow

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.

- [Survivor CES Workflow for Housing Agencies](#)
- [Survivor CES Flowchart](#)



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

Survivor CES Workflow

1. OC CES Admin sends match information to the Housing Provider via Match Email.
 - a. Survivor CES Access Point will provide eligibility forms requested by Housing Provider to support with eligibility review.
 - b. [CES Documents](#): Verification of Homelessness and Disabling Condition Form
2. The Housing Provider will [edit the housing opportunity](#) in HMIS to include the Survivor ID in the notes, so other clients are not matched to the opportunity while eligibility is confirmed.

ADD AN OPENING

Date 09/04/2024

Additional Notes Reserved for Survivor ID

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

Housing Development Property Name

SAVE CHANGES CANCEL

Survivor CES Workflow

3. The Housing Provider will inform the OC CES Admin/Survivor CES Admin if the match is denied or accepted.
 - a. If **denied**, the Survivor CES Admin will update the Survivor CES CQ to reflect that the client was denied the housing opportunity, and has returned to the CQ to be matched to another opportunity. The Housing Provider will edit the housing opportunity in HMIS to remove the Survivor ID. No further action is needed if the match is denied.
 - b. If **accepted**, the Housing Provider will complete the Coordinated Entry data entry for the client in HMIS prior to enrolling them into the housing project.



Survivor CES Workflow

4. The Housing Provider will [create a client record for the client](#) if one does not already exist.
 - a. Enroll clients into the appropriate CES Program:
 - i. Individuals (any household type that isn't family) - Individual CES or
 - ii. Family (at least one adult and minor child ages 0-17 household) - Family CES.
 - b. The Housing Provider will also complete the following steps to send a referral to the CQ.
 - i. Upload the Homelessness Verification/Disabling Condition Form(s)
 - ii. Create a Current Living Situation
 - iii. Create a CES Assessment
5. The Housing Provider will notify the OC CES Admin to match the client to the housing opportunity. Enroll the client into the housing opportunity and exit the client from the CES enrollment once moved into housing.

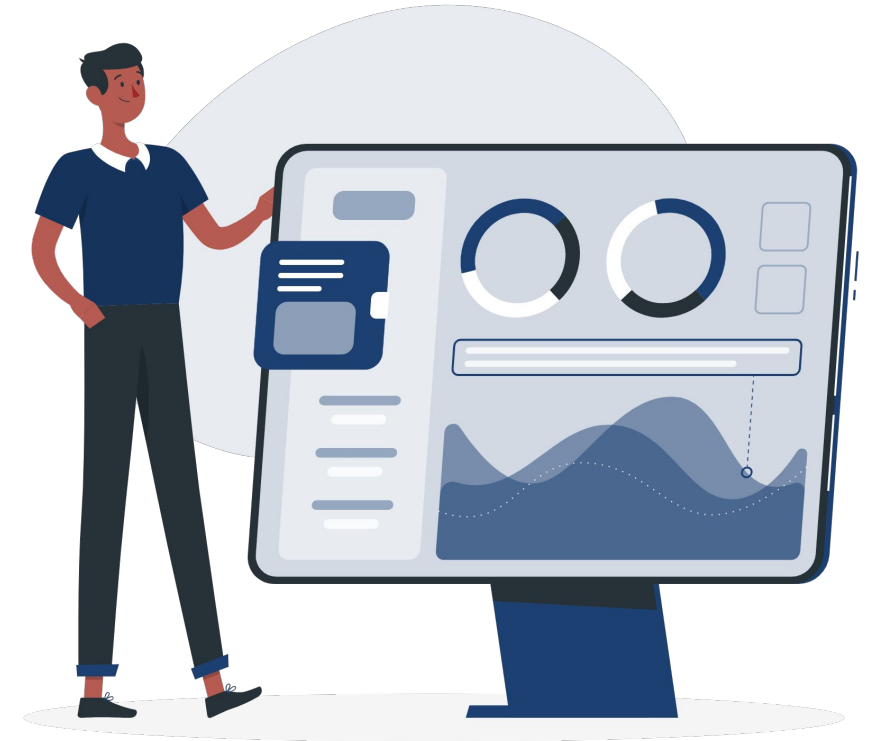


Project Performance Reports

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

Corrections for the Permanent Supportive Housing & Other Permanent Housing PPR draft data will be uploaded into DropBox by the end of the week.

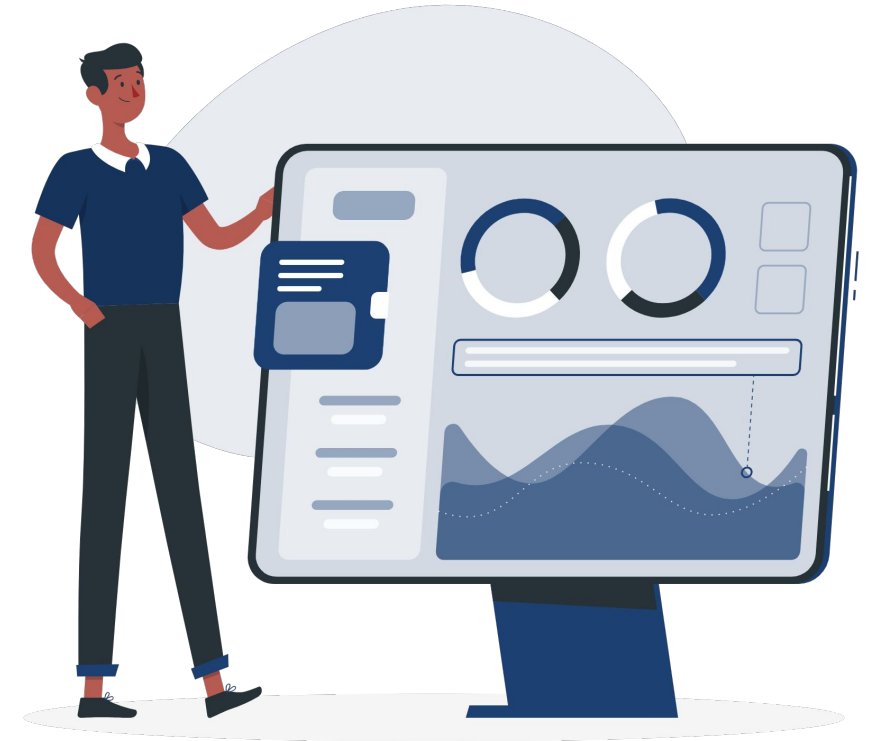
The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



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

Training & Resources

- [HUD's Equal Access Rule](#)
Mon, Sept 9th, 10am - 11am
- [Implementing HUD's Equal Access Rule in Emergency Shelters](#)
Thurs, Sept 12th, 9am - 10:30am
- [Social Services Agency \(SSA\) Overview Presentation](#)
Thurs, Sept 12th, 10am - 11am



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>

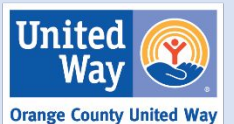
Q&A

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



Thank you
Have a great day!

Next User Meeting: Oct 2th





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