OC HMIS User Meeting Webinar Minutes
12/04/24

Contents

Agenda Items

HMIS Participating Agencies Schedule

The HMIS Participating Agencies Schedule is a list of the reports and requirements that happen throughout the year. The schedule is a good resource to have on hand for the reporting schedule throughout the year. The schedule is available on our website in the HMIS Forms and Documents tab under the HMIS Policy and Procedures tab, HMIS Participating Agencies Schedule

Audit Reminder

The HMIS Team is in the last month for agency audits. Thank you again to the agencies that have already participated and have provided good feedback to our team.

- The final audit tickets have been created.
- If your agency is in the process of scheduling your agency audit, please be aware that with the upcoming holidays, events, and reporting it is important to provide a meeting date.

Best Practices for Ticket Submission

The HMIS Team would like to share some best practices for submitting tickets to the HMIS Team. Using these best practices can reduce the amount of time it takes to resolve a ticket for users by reducing the need for back-and-forth communication.

- Please provide as much detail as possible regarding the issue you are experiencing.
- If you are requesting assistance on a report, please provide the pathway, name of the report and filters used.
- Once a ticket is created, please respond in that ticket thread so as not to create multiple tickets. This could result in the HMIS staff person that was already assisting, not seeing the important updated information.
- When leaving a voicemail on the Help Desk line, please leave your full name, agency name and a detailed message regarding the issue with a phone number you can be reached at.

Custom Field Request & Supplemental Services Form Updates

Please note that the Custom Field Request Form & the Supplemental Services Form now have the option for making changes to an existing field. This option can be used when you are wanting to add additional response options to a field or service.

These options will also come in handy if you are no longer needing a particular field or service to be collected and are requesting them to be set to inactive.

For custom field updates or requests please use the form available on this link, Custom Field Request Form
For supplemental services updates or requests please use the form available on this link, Supplemental Services Form

Reassigning Case Managers

When HMIS users leave an agency, agency administrators should reassign all their active clients to another HMIS user. If HMIS users transfer agencies, their previous caseload will also transfer with them if not reassigned to another HMIS user.

Agency administrators can reference our Reassigning Case Managers KB article for a step-by-step guide on this process.

Data Collection

HMIS users are required to collect Universal Data Elements (UDEs) about all clients they serve who participate in HMIS projects, regardless of funding source.

HMIS users must take steps to ensure that data collection practices are easy for clients to understand by providing them with a copy of *OC HMIS' Privacy Notice* upon request. Clients have a right to privacy, and can refuse to provide such information without being denied service.

Client consent is not needed to ask for their information, or to enter it into HMIS. Funders may ask specific UDEs, and request that they be entered into HMIS.

HMIS users should note that collecting data, and use or disclosure of such data are two different things. Any use or disclosure of data not listed in *OC HMIS' Privacy Notice* requires additional client consent.

Private Profile vs. Anonymized Profile

If a NEW participant does not consent to sharing their information, the record should be privatized.

During profile creation:
- Set the Permission status to 'No '
- The start date will be date of profile creation - no end date required
- Toggle 'Consent Refused '

The private profile can only be viewed by the agency who created the record.

If an EXISTING participant no longer consents to sharing their information, the record should be anonymized. To anonymize a record…

Upload a completed and signed copy of the Client Revocation of Consent Form to the participant's HMIS files. Copies are available from the OC HMIS website in English and Spanish.

The Agency Administrator should then submit a ticket to the OC HMIS Helpdesk with the participant's unique identifier requesting the profile be anonymized. The OC HMIS team will remove the participant's name, DOB, and SSN.

Agencies currently working with the participant would continue to see/use the anonymized record. Any new agencies would create a separate privatized record.

Agency Administrators can reference our Refusing/Revoking Consent to Share Personal Information KB article for further guidance on the topic.

Release of Information

Review the Consent to Share Protected Personal Information (PPI) form at intake or as needed. Release of information forms are available from the OC HMIS website in English, Spanish, and Vietnamese.

During profile creation, the ROI section is viewable on top right of the screen under 'Release of Information.' Select the appropriate permission status and ROI collection method.

For existing profiles, the ROI section of a profile can be accessed by selecting the 'Client Privacy' button; aka the shield icon, near the top right of the profile screen.

If the ROI is missing, a yellow banner will appear with the (Click here)prompt. The Privacy and Release of Information screen will appear.

Select the button, 'Add Release of Information,' to add the participant's ROI.

The Release of Information pop-up window appears with the following:
- Permission (Yes or No)
- Start Date (The date participant signed the ROI)
- End Date (Populates to 7 years from the start date)
- Documentation (The format used to store ROI)

ROI format options include:
- Electronic Signature*
- Attached PDF*
- Verbal Consent – temporary until Electronic or PDF ROI is obtained.
- Household – For minors whose HoH signed the Electronic or PDF ROI.

If a participant already has an active Electronic Signature or PDF ROI, upload additional scanned versions to the Files tab.

**Lists minor children and signed by HoH*

Agency Administrators can reference the Accessing and Completing Release of Information (ROI) Page KB for further guidance on the topic of ROI.

LSA & SPM Updates

The LSA is a report submitted by each CoC on an annual basis, and includes demographic, performance, and household composition information, as well as patterns of system use. The LSA from each CoC is consolidated to create the AHAR that is submitted to Congress.

Reporting Period: 10/01/2023 - 09/30/2024

- Nov 4 : HDX 2.0 officially opens for LSA uploads
- Nov 11-19 : 1st Round of Corrections & Warnings
- Dec 9-20 : 2nd Round of Warning Flags
- Jan 6 : HMIS Team prepares LSA for submission

The System Performance Report analyzes the performance of Safe Haven, Street Outreach, Emergency Shelter, Transitional Housing, and Permanent Housing (including Permanent Supportive Housing, Rapid-ReHousing, and Other Permanent Housing) project types in the Orange County CoC that participate in HMIS.

Reporting Period: 10/01/2023 - 09/30/2024

Both LSA and SPM data corrections have been sent out to each agency for their review and corrections.

Round 2 LSA Warning Flags and Pending Corrections due 12/20

- Warning Flags requires an explanation
- Low utilization may be affected by changes to bed inventory
- Longer than expected emergency shelter stays (120 days)
- Projects reported 0 households served, this was mostly due to the project not yet in operations
- Overlapping enrollment errors

SPM Corrections due 12/06. Below are common errors that your agency will need to review to address:

- Approximate date this episode of homelessness started
- Early start date: 1-1-1900s (homeless date before client's DOB)
- Date after project start - homelessness is a negative number

HIC and Sheltered PIT Preparation

Project Types included in the HIC and Sheltered PIT:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing (Housing with Services)
- Permanent Supportive Housing
- Other Permanent Housing

12/11 - HIC and Sheltered PIT Office Hours will cover the topic listed below and action items your agency could complete now to prepare the the HUD reporting.

- Agency Set-Up Review Dashboard
    - Program Descriptor Data
    - Funding Sources
    - Bed Inventory

Project Performance Report

The Project Performance Report (PPR) for Transitional Housing will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found at on our website by navigating to: Reports > Project Performance Reports

Corrections for the Emergency Shelter PPR draft data will be uploaded into DropBox in the upcoming weeks

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.

Holiday

The HMIS Helpdesk will be closed on **Monday, December 23rd through Wednesday December 25th** in observance of **Christmas.** We will also be closed on **Wednesday January 1st** in observance of **New Years**.

We will be back in office the following business days to assist you on **Thursday December 26th** and **Thursday, January 2, 2025.**

Q&A

Custom Field Request & Supplemental Services Form Updates

- Q: What is the difference between text and a text box?
    - A: A text field is a single line which is limited to 255 characters, a text box is a longer field that can be used to input more detailed information with a limit of 65,000 characters
- Q: Can tooltip text be added to the form?
    - A: Some sections of the form pertaining to the fields contain "*click here*" sections which redirect users to another page with more detailed information about the options listed in the form

Reassigning Case Managers

- Q: Is there a way to automatically mass transfer a user's client caseload?
    - A: No, there is no functionality within Clarity that allows for a mass transfer of user caseloads, all transfers must be done manually
- Q: Who can reassign caseloads?
    - A: All users, not just agency administrators, have the ability to modify user caseloads

Release of Information

- Q: What should agency admins do if a client refuses to consent to share information?
    - A: An agency administrator should contact the HMIS Helpdesk for a Helpdesk team member to update the client's privacy settings.
- Q: What is the difference between a private and anonymized client profile?
    - A: When a client doesn't have an existing HMIS record, a private profile can be created for them for a single agency's use. If a client has an existing HMIS record, their profile can be anonymized and have a restricted view for only those agencies who have served them in the past.

LSA & SPM Updates

- Q: Have the LSA round 2 corrections been sent out yet?
    - A: The LSA round 2 corrections will be sent out the week of December 9th, the SPM has already been sent out.

Future Meeting Information

January 2025 HMIS User Meeting Webinar

- Date: Wednesday, January 8th, 2025
- 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.