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Welcome!

December 2024
OC HMIS User Meeting

JOURNEY TO 100

United Way

Orange County United Way

Agenda

1. HMIS Participating Agencies Schedule
2. Audit Reminder
3. Best Practices for Ticket Submission
4. Custom Field Request & Supplemental Services Form Updates
5. Reassigning Case Managers
6. Data Collection
7. Private Profile vs. Anonymized Profile
8. Release of Information
9. LSA & SPM Updates
10. HIC and Sheltered PIT Preparation
11. Project Performance Report
12. Holiday
13. Q&A
14. Office Hours

Meeting materials and recording will be available on the OC HMIS website

HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule

Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March												
	Longitudinal Systems Analysis (LSA)	October	December	January	April												
	Housing Inventory Count (HIC)	January	February	April	May												
	Sheltered Point in Time (PIT)	January	February	April	May												
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January												
	Transitional Housing Project Performance Reports	April, October	May, Novemeber	n/a	June, December												
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November												
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September												
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October												
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November												
Orange County Requirement	Agency Audits	June	Specific to each agency	n/a	n/a												
	HMIS User Recertifications	July	August	n/a	n/a												
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Wednesday @ 10:00	n/a	n/a	n/a												

2024 HMIS Agency Audits

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.

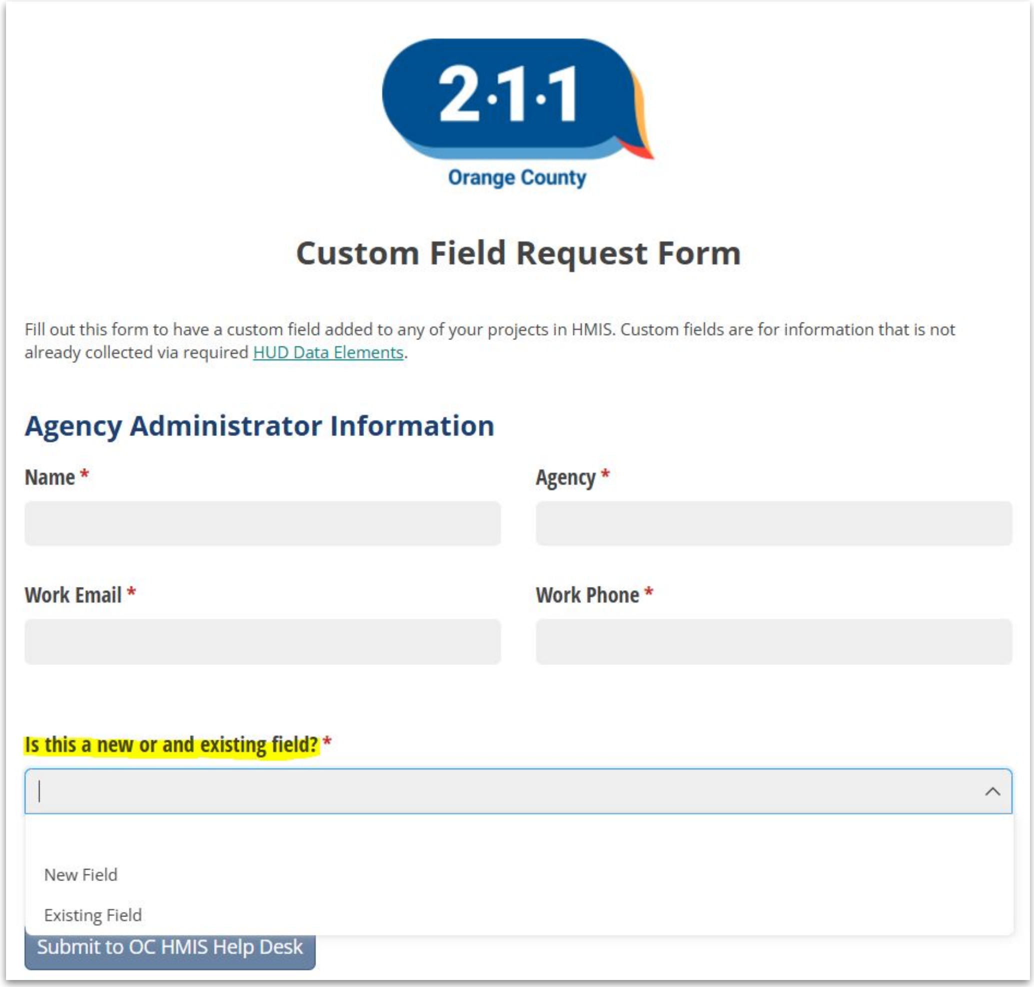
Form Update - Custom Field Request Form

Please note that the **Custom Field Request Form** now has 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.

For example, you have an existing custom field "types of trees" and want to add "willow" to the response options, this is where you could indicate that.

This will also come in handy if you are no longer needing a particular field to be collected.

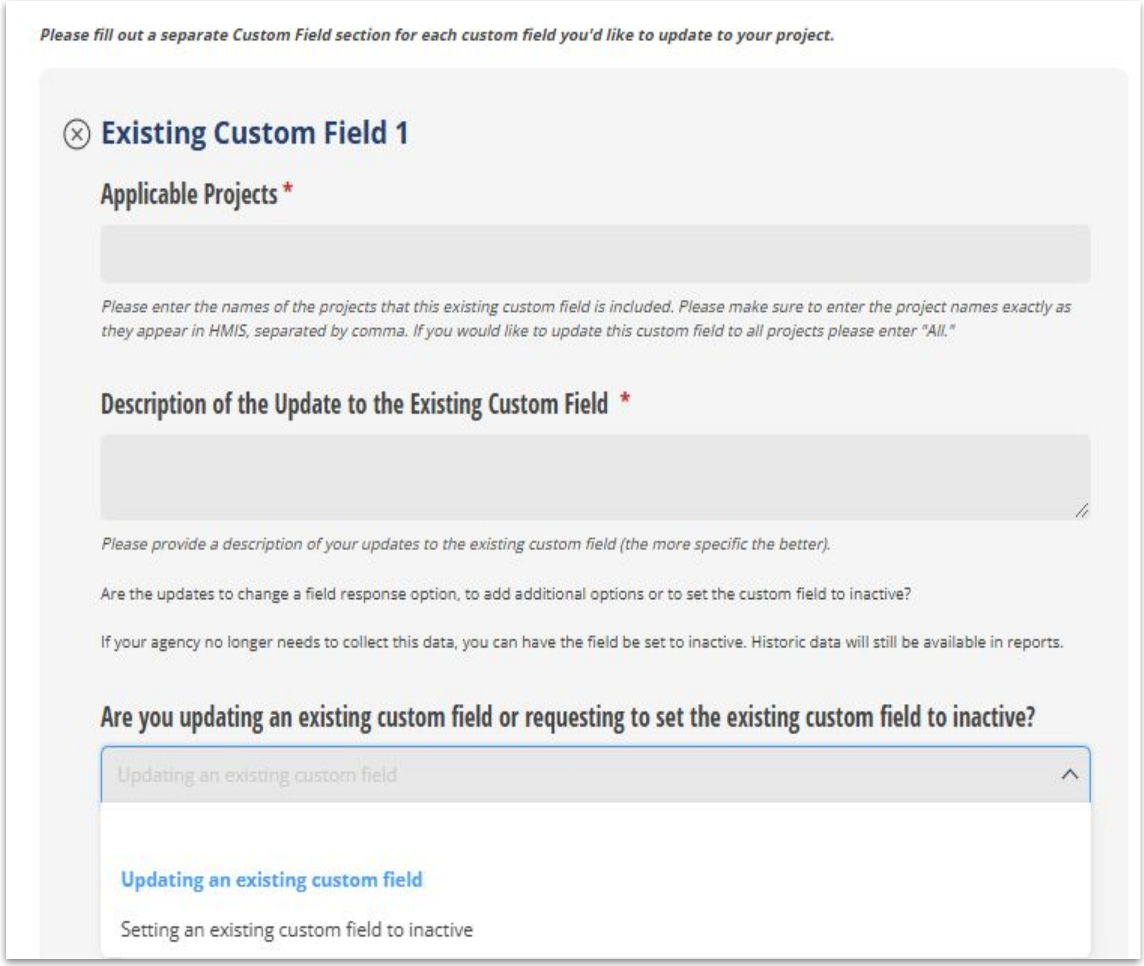
https://www.cognitoforms.com/_211OC/CustomFieldRequestForm



Form Update - Custom Field Request Form

When requesting an update to a field you'll notice that we ask for the following. This is so we can make sure we are updating the correct field in all the locations you are requesting they be updated.

- *Any Applicable Projects where the custom field is included, making sure the project names are entered exactly as they appear in HMIS.*
- *A description of your request.*
- *Whether this is to set an existing custom field to inactive or to update an existing custom field.*


Please fill out a separate Custom Field section for each custom field you'd like to update to your project.

Existing Custom Field 1

Applicable Projects *

Please enter the names of the projects that this existing custom field is included. Please make sure to enter the project names exactly as they appear in HMIS, separated by comma. If you would like to update this custom field to all projects please enter "All."

Description of the Update to the Existing Custom Field *

Please provide a description of your updates to the existing custom field (the more specific the better).

Are the updates to change a field response option, to add additional options or to set the custom field to inactive?

If your agency no longer needs to collect this data, you can have the field be set to inactive. Historic data will still be available in reports.

Are you updating an existing custom field or requesting to set the existing custom field to inactive?

Updating an existing custom field

Updating an existing custom field

Setting an existing custom field to inactive

Form Update - Custom Field Request Form

Form questions continued…

- *The existing custom field type.*
- *The existing field location (select all that apply).*
- *Any field dependencies. Does your custom field depend on the answer to any other fields, if yes, please give a brief description.*
- *Any additional information or comments.*

Existing Custom Field Type *

- Text
- Textbox
- Date
- Number
- Dollar
- Checkbox
- Picklist

Existing Custom Field Location *

- Profile
- Entry
- Status Update
- Assessment
- Exit

Where is the existing custom field located, click here for descriptions of each Field Location.

Comments

Please enter any other information about your updates to an existing custom field that has not been captured by this form.

+ Add Existing Custom Field

Form Update - Supplemental Services Form

Please note that the **Supplemental Services Form** now has the option for making changes to an existing services. This option can be used when you are wanting to add additional service items to an existing service or to set the service inactive.

For example, you have an existing service "Supportive Services" and want to add a new service item "Referral to Employment Development" to the response options, this is where you could indicate that.

https://www.cognitoforms.com/_211OC/supplementalservicesform

Service Information

For each service you will be asked to choose one of the following delivery types:

- **Single Event -** This option allows the service date to be set as both the Start and End Date, streamlining data entry and preventing users from accidentally setting a future end date for a service associated with a single date. This option allows for entering notes at the time you enter the service.
- **Long Term** – This option allows you to provide the service to an individual or household when it is provided. Use this option for services that are not provided every day. This option allows for entering notes at the time you enter the service.
- **Daily Attendance** – This option allows you to add the service to a list of clients who will be provided with the service once per day, and can also be used with Scan Card functionality. This service is ideal for tracking bed nights for Emergency Shelter projects. If you want to add notes to this type of service, you will need to provide the service, then enter a note on the client's **History tab**.
- **Multiple Attendance** – This option allows you to provide the same service to a list of clients multiple times per day, and can also be used with Scan Card functionality. If you want to add notes to this type of service, you will need to provide the service, then enter a note on the client's **History tab**.

You will also be able to slect from the following options for each service:

- **Track Time -** allows you to keep track of how much time you've spent on a service. Only available for case management/counseling type services.
- **Track Dollar Amount -** allows you to enter a dollar amount for the service to track the amount of a gift card or rental assistance payment provided. Only available for financial type services.
- **Enable Geolocation** - allows users to record geographic location information in a service item in a client record. That information is then displayed in an interactive map within the service item. Available for all services.

If you do not want any of these options applied to a service, simply leave the checkboxes blank.

Is this an existing or new service? *

New Service

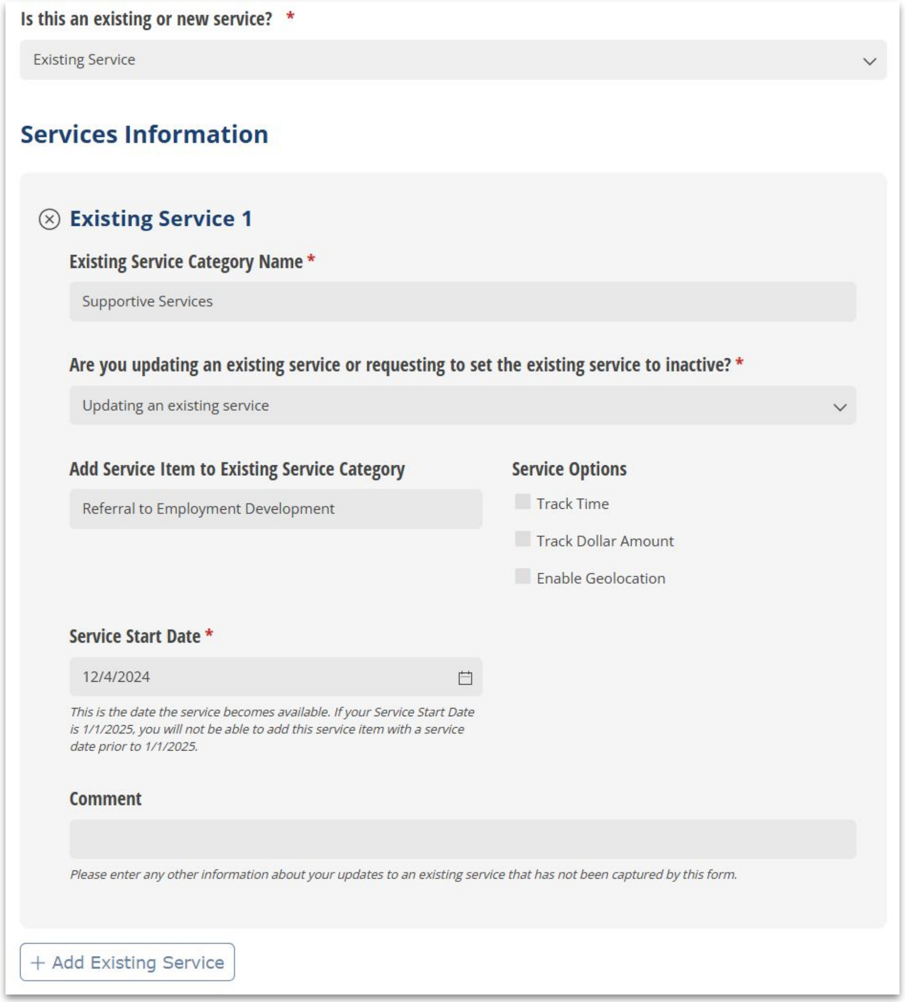
Existing Service

Submit to OC HMIS Help Desk

Form Update - Supplemental Services Form

When requesting an update to a service you'll notice that we ask for the following. This is so we can make sure the HMIS Team has all the information needed to support with your request.

- *Existing Service Category Name*
- *Are you updating an existing service or requesting to set the existing service to inactive?*
- *New Service Item Name and Start Date*
- *Comment for additional information you may want to include*



Is this an existing or new service? *

Existing Service

Services Information

Existing Service 1

Existing Service Category Name *

Supportive Services

Are you updating an existing service or requesting to set the existing service to inactive? *

Updating an existing service

Add Service Item to Existing Service Category

Referral to Employment Development

Service Options

- Track Time
- Track Dollar Amount
- Enable Geolocation

Service Start Date *

12/4/2024

This is the date the service becomes available. If your Service Start Date is 1/1/2025, you will not be able to add this service item with a service date prior to 1/1/2025.

Comment

Please enter any other information about your updates to an existing service that has not been captured by this form.

+ Add Existing Service

Reassigning Case Managers

When HMIS users leave an agency, agency admins 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 admins can reference our Reassigning Case Managers KB article for a step-by-step guide on this process.

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

Reassigning Case Managers DEMO

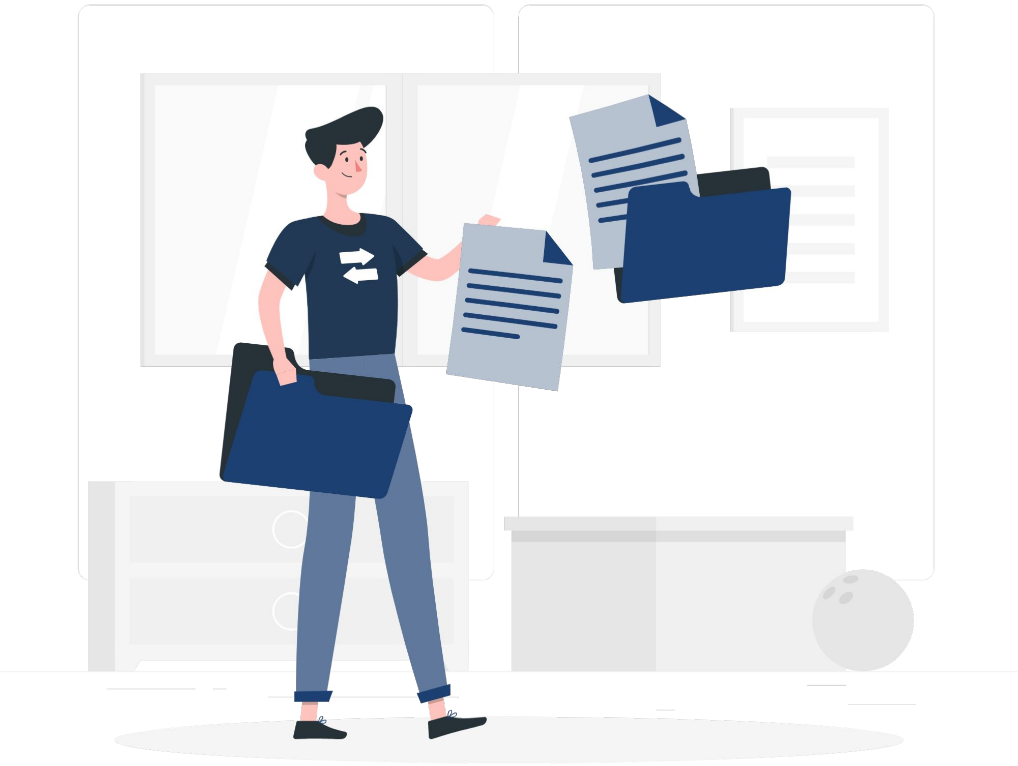
Data Collection Disclosures

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 client consent.



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

Privatizing vs Anonymizing a Profile

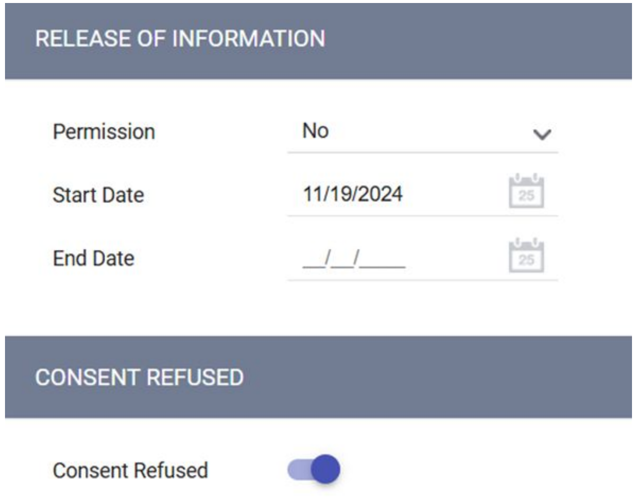
Due to HMIS being a data sharing platform participants should understand their right to refuse or revoke consent to sharing their information at any time. Participants who opt not to consent can still have their data entered into either a privatized or anonymized HMIS record.

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

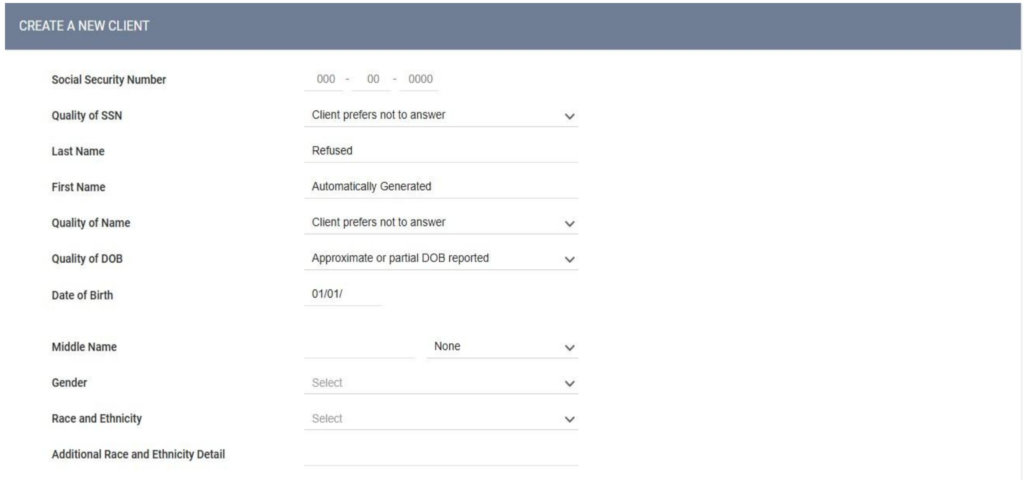
During profile creation:

- 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.



[ROI screen at record creation]



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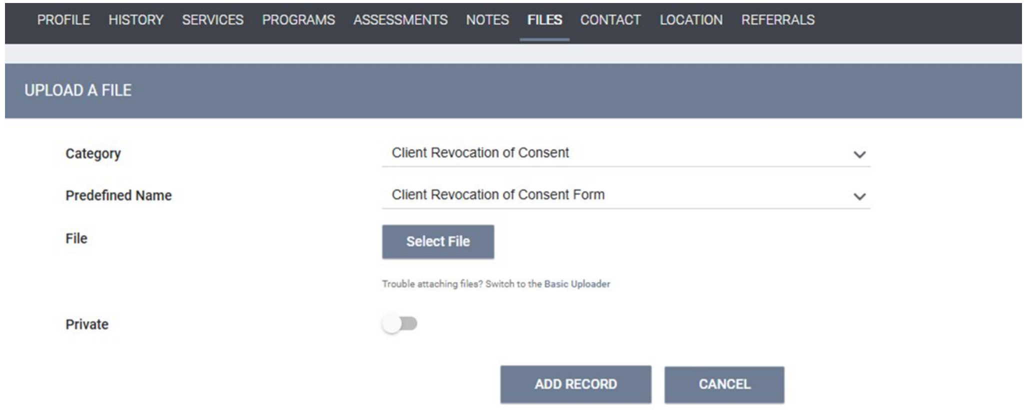
Privatizing vs Anonymizing a Profile

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.



Release of Information (ROI)

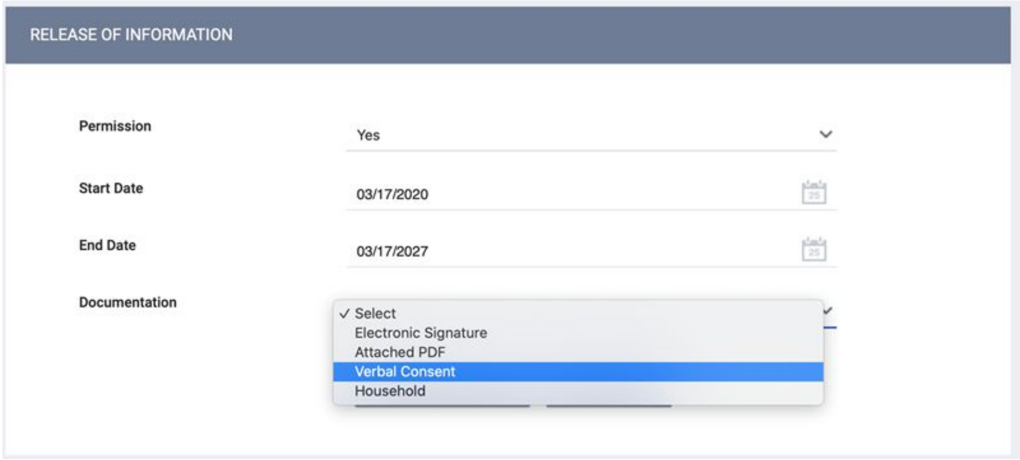
Review the Consent to Share Protected Personal Information (PPI) form at intake or as needed. Release of information forms are available from the OC HMIS website in English, Spanish, and Vietnamese.

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.

[ROI field at profile creation]



[ROI banner and Client Privacy Button]

Release of Information (ROI) Cont…

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

The Release of Information pop-up window appears with the following:

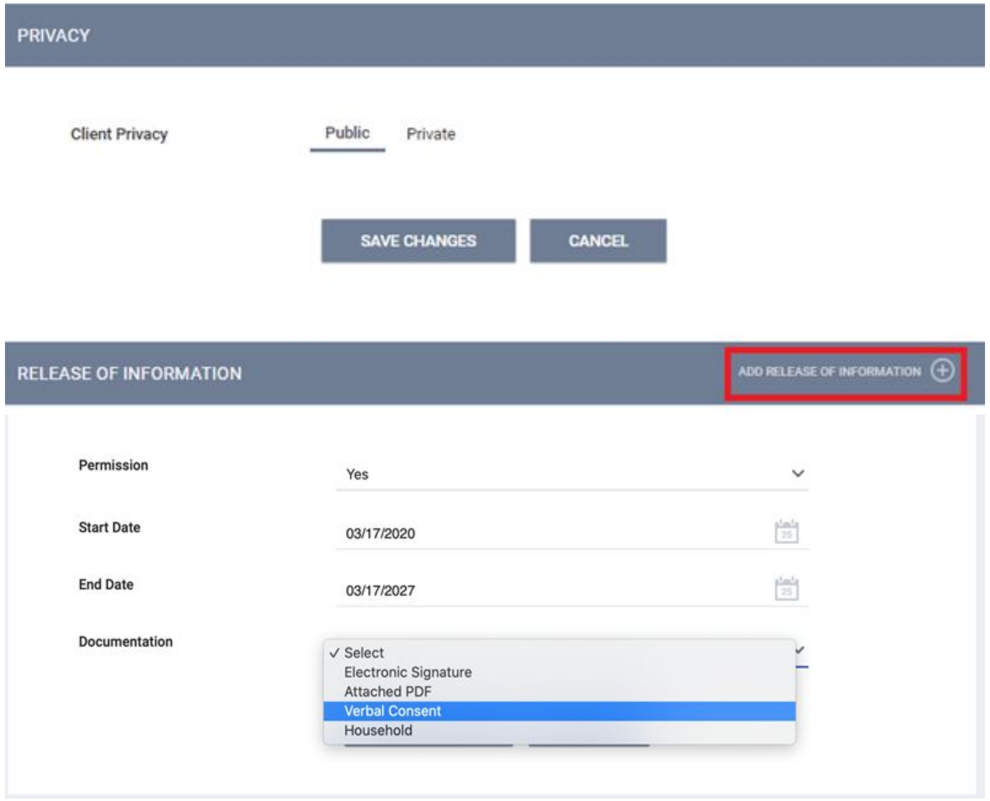
- Permission (Yes or No)
- Start Date (The date participant signed the ROI)
- End Date (Populates to 7 years from the start date)
- Documentation (The format used to store ROI)

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*



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2024 Longitudinal Systems Analysis (LSA) Timeline

Nov 4th	Nov 11th - 27th	Dec 9th - 20th	Jan 6th
HDX 2.0 officially opens for LSA uploads	1st Round of Corrections & Warnings	2nd round of Warnings Flags	HMIS Team prepares for LSA submission

LSA & SPM Updates

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**

- 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

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

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

- Agency Set-Up Review Dashboard
  - Program Descriptor Data
  - Funding Sources
  - Bed Inventory
- Action Items to be completed now

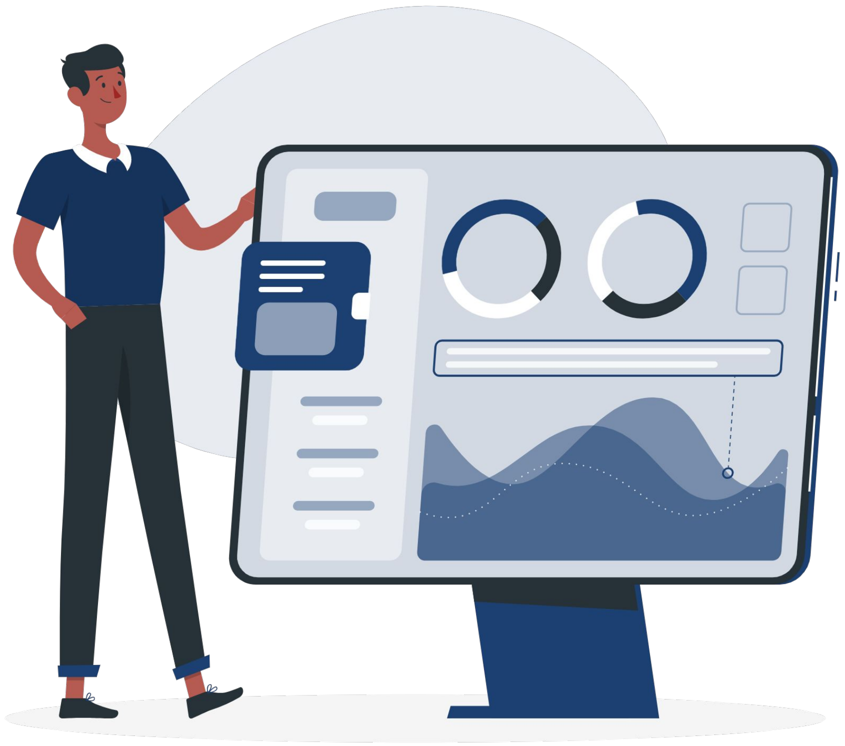
Graphic by: https://storyset.com/online

Project Performance Reports

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.



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

Holidays Observed

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.**

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: Jan 8th

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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