OC HMIS User Meeting Webinar Minutes
05/05/25

Contents

Agenda Items

HMIS Participating Agencies Schedule

Here are the following items that are coming up with due dates. Some reports the HMIS team supports are HUD reports so we may not have the exact due date. When we receive guidance from HUD, we update the community with the due date.

- System Performance Measures Report (SPM) - Estimated HUD Due Date in March. Pending Updates from HUD
- Housing Inventory Count (HIC) - Estimated Agency Due Date in February.
  - Submission Due Date: February 13th
  - Final Review: March 28th
- Sheltered Point in Time (PIT) - Estimated Agency Due Date in February.
  - Submission Due Date: February 13th
  - Final Review: March 28th

Updated Reporting Period to support FY2025 CoC Application Timeline
- PPR Corrections are due March 19th
    - Permanent Supportive Housing: 2/1/24 – 1/31/25
    - Rapid Re-Housing: 3/1/24 – 2/28/25
    - Transitional Housing: 3/1/24 – 2/28/25
- Data Quality Report Card Corrections are due April 18th
    - Average DQ Measure: 1/1/25 – 3/31/25

The schedule can be found on our OC HMIS website under the HMIS Forms and Documents tab >> HMIS Policy and Privacy Forms >> HMIS Participating Agencies Schedule

HIC PIT Reminder

The HMIS Team is currently in the Review Phase of the 2025 HIC and Sheltered PIT. Thank you to all the participating agencies for your support. Please keep an eye out as our HMIS Team follows up to request for additional information.

For additional information and to access the training materials, please review the 2025 HIC and Sheltered PIT knowledge base article.

Ticket Submission

The HMIS Helpdesk has seen an increase in ticket submissions by non-HMIS Agency Administrator staff.
- Agency Staff should not submit tickets or Account Update Forms.
- All contact with the Help Desk must be via the agency's HMIS Administrator.
- Tickets or Account Update Forms submitted by non HMIS Agency Administrators will be closed and redirected to the HMIS Agency Administrator.

A gentle reminder that…
- HMIS Agency Admins (AA) are strongly encouraged to create a HappyFox account to submit tickets and track responses.
- Please avoid opening multiple tickets about an ongoing issue and instead reply back on an existing ticket.
- If a ticket is closed before an issue is fully resolved, AAs can reply to reopen the ticket and request additional support.

Agency Admins can select from the following ticket categories:
- Agency or Project Setup - Request to set up a new project, or questions about a project setup
- Client Record Merges - Request to merge duplicate client profiles, or questions about profile merges
- Client Record Request - Use when a client requests their HMIS record, use UID for identification

- Feedback - Use to respond to HMIS surveys, or for other community feedback initiatives
- HMIS Functionality Issues - Use for troubleshooting HMIS errors staff members encounter
- Reports (including repository exports and corrections) - Request new reports, or to provide updates/corrections to existing reports; Use for questions about LSA, SPM, HIC/PIT, DQRC and PPR
- Users and Trainings - Requests to reset trainings courses, or for questions/issues encountered about the user onboarding process

Grievance Process

A friendly reminder that agencies must provide clients with the HMIS Grievance Form and outline grievance policies during intake.

Both the agency and the HMIS grievance forms should be available for the client to access without having to request a copy. The HMIS Grievance Form is available in English and Spanish from the HMIS Policy and Privacy Forms page.

The Grievance Form can be completed by the client if they believe that their HMIS data has been used in a manner that they disagree with or violates their rights. **The client must file a grievance with the agency of concern prior to completing the HMIS Grievance Form.**

Data Collection and Release of Information

HMIS users are required to collect Universal Data Elements about all clients who participate in HMIS, 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 during intake and upon request.

Agencies should post/share Privacy Notice wherever client intake occurs.

During intake, the agency also asks clients for their consent to share the client's data in HMIS via the Consent to Share Protected Personal Information form.

Clients have a right to privacy, and can refuse to sign the Consent to Share PPI Form without being denied service.

Review the Accessing and Completing Release of Information (ROI) Page and Refusing/Revoking Consent Knowledge Base Articles for an outline of these procedures.

Report Highlight: Data Accuracy Dashboard

The Data Accuracy Dashboard is a report made available for HMIS Users to provide a broad overview of the accuracy of their agency's HMIS data.

Agency administrators should review the Data Accuracy Dashboard once per month for all projects at their

agency to assess the accuracy of their HMIS data. The dashboard information should be shared with relevant staff members for further review and verification of client information entered into HMIS. Any dashboard information that does not reflect real client information should be corrected by the relevant staff member.

HMIS Users can locate the Data Accuracy Dashboard in Clarity by navigating to:
reports > data analysis > orange county clarity system reports > data quality > data accuracy dashboard

Inactive User Training

Clarity automatically locks user accounts after a period of inactivity of **more than 60 days**. Users typically receive a notification two (2) calendar days prior to their account becoming locked.

Once an account is locked, an HMIS Agency Administrator will need to submit a ticket to the HMIS Helpdesk to reset that user's training materials and reactivate their account.

Inactive users will need to retake the following training courses/materials before account reactivation:
- HMIS Part 1
- HMIS Part 2
- HMIS Skills Test

HMIS Training and Resources

SOAR Webinar *Requires Reservation*
    March 6th, 2025 at 12pm PST.

Live HMIS Part 2 Training Course
    Wednesday, March 26th, 2025 at 11am - 12:30pm

(Added to share new training/resources with the HMIS community)
Vicarious Trauma and Self Care Training
- Friday, March 21st at 2pm - 3pm
- Email Sara Behmerwohld at sbehmerwohld@humanoptions.org with "SELF-CARE TRAINING" in the subject line to receive Zoom info.

OC CES Academy
- The Office of Care Coordination is proud to announce the launch of the Orange County (OC) Coordinated Entry System (CES) Academy, a training platform, and the launch of the CES 101 training module. The CES 101 training module is an introductory course that will provide an overview of CES. The CES 101 training module is designed with a wide audience in mind and has something for the most

experienced CES navigator or someone unfamiliar with CES. The OC CES Academy will continue to evolve over time to include training modules for Access Points and Housing Providers that will focus on specific CES processes and procedures, as the need arises for additional CES tools and resources, and when CES policies and practices change.

A reminder newsletter with more details will be sent out the week of the OC HMIS training. For training hosted by community partners please review the OC HMIS website for additional details.

HMIS Interface Focus Group

211OC would like to request users to join our Focus Group to test out our new Clarity Interface.

We ask that users submit a ticket using the "feedback" category and let us know if you are interested in participating in the HMIS Interface Focus group.

Data Entry Guidance

The HMIS Team received feedback from the community to discuss the data quality components along with sharing guidance on how to review data included in Goal 11 measure for the Project Performance Report.

Data Quality Components:
- Data Timeliness: It is important to enter data in a timely manner because it ensures data recorded in HMIS reflects the most current information on the clients served.
- Data Completeness: It ensures data recorded in HMIS represents the population served comprehensively.
- Data Accuracy: It ensures the reliability and validity of the information recorded in HMIS
- Data Consistency: It is important to have the same understanding of the clients' information and the way it is collected in order to have accuracy. In other words, data consistency is a prerequisite in order to achieve data accuracy.

Goal 11- Receive Referrals from the Coordinated Entry System

Permanent Housing and CoC/ESG funded projects should be receiving referrals from the Coordinated Entry System to ensure that the highest priority clients are receiving the housing resources they need to end their homelessness.

Applicable Project Types & Targets:

- Rapid Re-Housing (RRH): = 100%
- Permanent Supportive Housing (PSH-OPH): = 100%

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

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

Goal 11 - Completed Referrals

- To ensure the referral is completed, users can review the history tab. The referral should have an end date that matches the program enrollment. And under the Programs tab, there should be a link icon which represents there was a CES Referral linkage to this enrollment.

Project Performance Report

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

To support FY2025 CoC Application Timeline, the HMIS Team will send out corrections for the Permanent Supportive Housing & Other Permanent Housing (PSH-OPH), Rapid Re-Housing (RRH), and Transitional Housing (TH) PPR draft data that will be uploaded into DropBox in this 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.

Survey

The HMIS Team is seeking feedback from our community on our Monthly HMIS User Meetings. Here's the link to the Survey: https://forms.gle/scvYfStTEyQ9BdMo7

Holiday

The HMIS Helpdesk will be closed on Monday, March 31st in observance of Cesar Chavez day. The HMIS Team will return the following business day, Tuesday April 1st.

Q&A
Data Collection and Release of Information
- Q: I have a few clarification questions. Are you saying that a client saying they want to be private and a client saying they refuse consent are two different things? If so, is this something we need to clarify when they write refused on the ROI? If so, how would you phrase that?

- - A: Agency can collect and enter data into HMIS. If the client provides consent to share their data, their profile will be set to public. If the client does not provide consent to share their data, the agency can still enter the data and set the profile to private. Private client profile is only visible by the agency that creates the profile record. Clients that decline to share their identifying information in HMIS, agencies can create a record without client-identifying information.
- - Q: If a client on intake signs the client revocation form, before they are in the system, do we make it anonymous or private?
    - A: Agency will set the profile to private and only your agency can see the profile. Your agency can still enter the client data if the client provides that information. Please review the "If the client does not have a record in HMIS" section within the Refusing/Revoking Consent to Share Personal Information Knowledge Base article. If a client declines to share their identifying information in HMIS and they don't have a record yet in HMIS, at record creation you will push the Consent Refused toggle forward which will anonymize their profile.
- - Q: If the profile is set to "private," they will not have the ability to be connected to any other programs in HMIS. Should this be set rather as "Client refuses consent"? That is, if they want to be connected to housing and shelter resources, etc.?
    - A: That is correct, clients that want to participate in CES will need to have a public profile due to system functionality and care coordination with CES. Clients can have a public profile without client-identifying information.

Report Highlight: Data Accuracy Dashboard
- - Q: Is there a details report of this that we can download??
    - A: Yes, both the Data Accuracy Dashboard and Data Accuracy Dashboard Details reports are available on the Live Clarity site.
      - Reports > Data Analysis > Orange County Clarity System Reports > Data Quality > Data Accuracy Dashboard/Data Accuracy Dashboard Details

Future Meeting Information
April 2025 HMIS User Meeting Webinar

- Date: Wednesday, April 2nd, 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.