OC HMIS User Meeting Webinar Minutes
04/02/25

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) - Updates from HUD due April 11th
- Housing Inventory Count (HIC) & Sheltered Point in Time (PIT)
  - Pending Updates from HUD when HDX 2.0 opens for HIC/Sheltered PIT submission
  - Pending final HMIS and HDX data review
- 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

CES Housing Assessment Forms

The additional languages for CES Housing Assessment Forms have been updated and are now available on our website. You can find the documents under the HMIS Forms and Documents tab > Client Data Collection Forms > CES Documents

Coordinated Entry – Individual Housing Needs Assessment and Coordinated Entry – Family Housing Needs Assessment is available in the following languages: English, Spanish and Vietnamese

Client Consent Form Update

The final page of the HMIS Consent to Share Protected Personal Information Form has been updated to reflect changes in the roster of HMIS participating agencies.

This form can be found on our website by navigating to: HMIS Forms and Documents > HMIS Policy and Privacy Forms > Consent to Share Protected Personal Information

A complete list of all agencies that participate in OC HMIS can be found at: https://ochmis.org/contributing-agencies/

Reassign Case Manager

Users who need to provide services to a client at their agency or to one served by a partner agency will need to change the assigned staff to themselves.

1. Confirm your agency access by navigating to the proper agency using the agency drop-down menu
2. Search for the client's *Client Profile* record, and select the *edit* icon
3. Go to the client's *Program* tab and edit the program by selecting the *edit* icon next to the enrollment.
4. Locate the *Assign Staff* section of the program, and click on the *edit* icon to the right of the name.
5. A drop down menu will appear that has a list of all the active staff at the agency. Choose yourself from among the list, and select *Save Changes*.

NOTE: Users who switch over to a partner agency will only be able to see a list of users at that agency. Agency Admins will not be able to reassign case managers from one agency to another, case managers themselves must do so.

For more information about this topic, please review our Reassigning Case Managers KB article.

Program Move

If 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.

Agency administrators 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.

Agency Set Up Review Dashboard

Beginning Friday, April 4th 2025, the HMIS Team will upload the Agency Set-up Review Dashboard to each agency's [Dropbox](#) on a quarterly basis for Agency Administrators to review.

The Agency Set-Up Dashboard is available to HMIS users who need an overview of how their agency's projects are set-up in HMIS. The dashboard is broken down into three parts: program descriptor data, funding sources, and bed inventory.

To run the Agency Set-Up Dashboard, go to Reports > Data Analysis tab > Orange County Clarity System Reports > Agency Management, Agency Set-Up Review Dashboard > Run.

Filter the *Agency Name,* and if desired, *Program* or *Program Type*. Once the filter is set to your agency, hit run.

When reviewing the report pay close attention to elements that may not be set-up as expected or need to be updated. If any corrections need to be made to your program, HMIS Agency Administrators may submit a [Help Desk ticket](#) for assistance with any corrections.

Please review the [Agency Set-Up Dashboard Knowledge Base Article](#) which further outlines the report and includes a helpful 8-minute YouTube tutorial video that goes into great detail exploring each of the three sections.

LSA Data Quality Dashboards

The Household & Enrollment Data Report is designed to identify common issues with household and enrollment data that impact LSA submissions. Here are a few examples of common issues:
- Program Enrollment w/ No Head of Household
- Heads of Households younger than age 6
- Clients with Missing Date of Birth
- Clients Born After their Enrollment Start Date

To learn more about this dashboard, please review the [LSA Data Cleanup: Household and Enrollment Data article](#) in the Help Center.

The Overlapping Enrollments Data Report is designed to identify overlapping enrollments. This is helpful in identifying cases where a client needs an exit date entered to close out their program participating or perhaps situations where a client was accidentally enrolled in an incorrect project or if an exit date is off by one day.

Here are a few examples of what data incongruencies could be flagged:
- Clients who have an ES and PSH enrollment overlap
- Clients enrolled in two ES projects at the same time

To learn more about this dashboard, please review this KB on LSA Dashboards.

Please note that the HMIS Team will be uploading the reviewed LSA Data Cleanup Reports in your Agency's DropBox by Friday, April 4th, 2025:
- Household and Enrollment Data Report
- Overlapping Enrollments Report

Project Performance Report

The Project Performance Report (PPR) for PSH-OPH, RRH, TH PPR (Permanent Supportive Housing/Other Supportive Housing, Rapid Re-Housing, and Transitional Housing) will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found at our website by navigating to:
Reports > Project Performance Reports

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.

HMIS Training and Resources

- **Mental Health Services Act (MHSA) Training**
  The Office of Care Coordination, and in partnership with the Health Care Agency is hosting a training on how Coordinated Entry System (CES) participants can become Mental Health Service Act (MHSA) certified.
  - Thursday, April 10th, 2025 at 1pm - 2pm
    Meeting Link via Zoom: Click here for the meeting link
    Meeting ID: 647 571 4255
    Join by phone: +1 669 900 9128

- **OC CES Academy**
  - The Office of Care Coordination launched the Orange County (OC) Coordinated Entry System (CES) Academy, a training platform, and the launch of the CES 101 training module.

DropBox Cleanup

Quarterly DropBox Clean Up Schedule:
- ○ January 2025
- ○ April 2025
- ○ July 2025
- ○ October 2025

Please review your Agency's DropBox folder and download any files you will need for your records by Friday, April 18th. The HMIS Helpdesk will be removing all DropBox files on Monday, April 21st. Thank you for your cooperation!

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/1cbX6Upj41qKzsLj7

Q&A

CES Housing Assessment Updates
- ● Q: Can you please share what changes were made to the forms for the CES Housing Assessment?
  - ○ A: The CES Housing Assessment form includes the accessibility needs questions. This update was pushed out on Clarity 6/2024. We now have the forms available for the additional languages for the community to use. Please review the notes about the update from the 06/2024 HMIS User Meeting linked here.

Longitudinal System Analysis (LSA) Reporting
- ● Q: When is the data clean up for the LSA report due?
  - ○ A: The OC HMIS Team will be sending out a newsletter with more details on correction submissions. Corrections will be due at the end of the month. The LSA data clean up will be an on-going process and Agency Administrators will receive an updated report quarterly moving forward.

Future Meeting Information
May 2025 HMIS User Meeting Webinar

- ● Date: Wednesday, May 7th, 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.