



# HMIS Agency Administrators Meeting

Sept 6, 2018



# Agenda

1. CoC / Coordinated Assessment / UPLIFT / Bitfocus Updates
2. HMIS Newsletter
3. Report Deadlines
4. CCP Data Quality Reports
5. Coordinated Assessment: Denying Referrals
6. Data Literacy Institute: Feedback and Embedded Dashboards
7. CDQI: Longitudinal System Analysis (LSA) Report

# CoC / Coordinated Assessment / UPLIFT / Bitfocus Updates

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# HUD CE Data Elements Discussion

HUD has released some proposed data elements for the Coordinated Entry process that include HMIS data collection requirements and recommended reports.

Communities have the opportunity to provide feedback to HUD by Oct 1.

OSH would like to review the proposed feedback with agencies and gather feedback to submit to HUD. This discussion will take place during the **Coordinated Assessment Work Group on Thurs, Sept 13 from 1-2:30pm. Location: The Health Trust, 3180 Newberry Dr, Unit 200, San Jose, CA 95118.**

Please send an agency representative to this meeting who is familiar with the CE process and HMIS data collection!



# Clarity Connect Conference

Bitfocus is holding our first **Clarity Connect** conference this year from **November 19-20 in Las Vegas!**

Featuring:

- Hands-on Clarity training
- In-depth policy, coordinated entry, and data analysis training
- Meet the Bitfocus Team
- Collaborate and mingle with fellow leaders in the HMIS space

[Registration link](#) will be posted in the Agency Admin minutes

*Note: Clarity Connect is an allowable training expense for HUD Continuum of Care (CoC) and Emergency Solutions Grants (ESG) Program grantees. Grantees attending who are funded by HUD should maintain a proof of attendance and a copy of the final Clarity Connect 2018 Agenda for their files.*

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# HMIS Newsletter

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Will be sent out monthly to all HMIS users

**August 2018 Newsletter** included:

- LSA Prep
- Merging vs Deleting Clients
- Data Quality Lab
- Data Literacy Institute - Reporting Resources
- Report Spotlight: Program Details Report
- Upcoming Events

Web link to the newsletter will available in the Agency Admin meeting minutes



## Santa Clara HMIS News, July 2018

Welcome to the Santa Clara County HMIS Newsletter! In this edition you'll find the following:

- [Data Literacy Institute Launched This Month!](#)
- [Data Quality Lab - Part IV - Getting Services Right](#)
- [Reminder: Permanent Housing/Community Queue Cross Check](#)
- [Report Spotlight: \[HUDX-227\] Annual Performance Report \[Oct 2017\]](#)
- [Bitfocus is Hiring!](#)
- [Upcoming Events](#)

## Data Literacy Institute Launched This Month!

Starting this month, OSH, in collaboration with the CoC, launched the Data Literacy Institute. The institute will consist of a series of training opportunities and development of learning materials for the CoC and community partners. *The goal of the institute is to help staff at all levels enhance their understanding of the data collected in HMIS, how to measure program performance, and how to use data to effectively communicate the success of your programs.*

There are 2 Data Literacy tracks. Each track will feature quarterly workshops covering a different data topic. In this quarter (July - Sept), we will be holding 2 workshops for each track!

### Agency Staff Track:

*Target Audience:* HMIS users, Case Managers, Outreach Workers, Data Entry staff, Front Desk staff... anyone at your agency interested in learning more about data!

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# Report Deadlines





## Report Deadlines

Report	Submission Deadline	Notes
APR / CAPER	Rolling, depending on your grant year	All submissions in Sage after 10/1 will use the 2018 version of the report
PATH Annual Report	December 31	Will be a CSV export instead of manual entry
SSVF Upload (CSV 6.11)	Sept 1 - 9, Oct 1 - 9	
RHY Upload (CSV 6.12)	TBD	

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# CCP Data Quality Reports

# CCP Data Quality Reports

- Bitfocus emailed Agency Administrators for agencies who provide Intensive Case Management (ICM) services as part of CCP
- Users with an Agency Manager license can access the reports through the Data Analysis tab in Clarity, in the Santa Clara County HMIS Reports folder
- Run the “CCP Data Quality Dashboard”

The screenshot displays the Clarity Human Services interface. The top navigation bar is dark gray with the word "System" on the left. Below it are tabs for "REPORT LIBRARY", "EXPLORE", and "DATA ANALYSIS", with "DATA ANALYSIS" being the active tab. On the right of the navigation bar are icons for a list (1), a grid, and an envelope (5), followed by the user name "Jenn Ong, System" and a profile icon "JO". Below the navigation bar is a search bar and a "CASELOAD" link. The main content area shows a list of report categories: "Built In Reports" (1 report(s)), "Santa Clara County HMIS Reports" (5 report(s)), and "System Reports" (7 report(s)). A red arrow labeled "1" points to the "DATA ANALYSIS" tab. Another red arrow labeled "2" points to the dropdown arrow next to "Santa Clara County HMIS Reports". On the right side of the interface, there is a logo for "CLARITY HUMAN SERVICES" and a sidebar area.

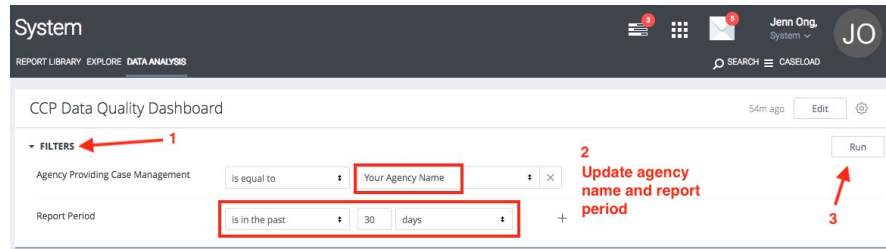
Report Category	Report Count
Built In Reports	1 report(s)
Santa Clara County HMIS Reports	5 report(s)
System Reports	7 report(s)

# Running the Report

The dashboard will include instructions on how to run the reports and download them. PDF instructions were also sent.

3 reports are included:

- **All Enrollments** - use as a program roster
- **CCP Objectives** - monitor CCP income/medical home/behavioral health services
- **Housing Service** - monitor housing location services



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# Coordinated Assessment: Denying Referrals



# General Guidelines for Denying Referrals

If your program accepts referrals through HMIS as part of Coordinated Assessment:

- Always check with the OSH MatchMaker before denying a referral:
  - PSH - Shelly Barbieri
  - RRH - Jessica Orozco
  - TH - Mona Guerrero
- When denying a referral:
  - Choose Send to Community Queue = “Yes” (unless you are instructed not to by the OSH Program Manager)
  - Try to choose the Denied Reason that best fits the situation
  - If you’d like to add a note that will help the OSH MatchMaker for future referrals (for the client or for your program), add it in the Denied Message section



# Updates

Denied Reasons have been reviewed by the OSH MatchMakers, and will be adjusted to include additional categories

When a referral is denied, the autogenerated Clarity notice will include next steps (if any) that users should take if they are still in contact with the client, or if the client returns in the future for services

Reasons for Denial	When to Use
Client could not be located (NEW)	You are unable to find the client after multiple attempts
Lack of Eligibility (Specify in Denied Message)	Client is not eligible for the program - please write the specific eligibility criteria that the client did not meet in the Denied Message
Full Capacity/No Availability	Your program is at full capacity and has no more capacity to serve the client
Client out of County (previously "Client out of Jurisdiction")	Client has moved out of the County and will no longer need housing services in Santa Clara County
Client currently incarcerated (NEW)	Client has been put in jail / prison
Client previously received services	Client has received services through this program already and is not currently eligible to receive services at this time
Needs could not be met by program	Client's needs could not be met by the program
Disagreement with rules	Upon learning program rules, client did not want to participate
Client refused services	Client did not want services
Client did not show up or call	Client was contacted, but did not follow up on phone calls or scheduled meetings
Referral time expired	Referral has been open for too long and had to be closed due to lack of progress on the referral
Client Housed - Self-Resolved (renamed from Self Resolved - Client Housed)	Client was able to find housing by themselves
Client Housed - through another program (NEW)	Client was housed through another program
Client currently in another program	Client is currently enrolled in another program
Falsification of Documents	Client provided fake documents during assessment of program eligibility
Other	Use only if the none of the other Denied Reasons apply. Describe the reason for denial in the Denied Message.
RETIRED Denied by Landlord/Property Manager	DO NOT USE



# Email Notifications for Denied Referrals

- If client could not be located...
  - ... if you are in contact with the client, make sure their Location and VI-SPDAT information is up-to-date
- If client is currently incarcerated...
  - .... if the client returns for services in future and is homeless, make sure their Location information is up-to-date and conduct a new VI-SPDAT
- If client was denied due to lack of eligibility...
  - ... make sure their VI-SPDAT information is up-to-date



Dear Jenn Ong,

Referral to Hello program for client D5FB4D10E has been denied by Jenn Ong

1. Update their Location tab with their latest contact information. Information on how to add Location information can be found here: <https://get.clarityhs.help/hc/en-us/articles/115000414067-How-do-I-create-and-maintain-addresses-for-my-client->

2. If it has been over a year since the latest VI-SPDAT or there has been a significant change in their status since the latest VI-SPDAT, conduct a VI-SPDAT with the client and refer them to the Community Queue if they are not already on the queue. Information on how to do this is here: <https://get.clarityhs.help/hc/en-us/articles/115000467408-Working-with-the-VI-SPDAT-V2-VI-F-SPDAT-V2-for-Centralized-Intake->

Clarity Training System tr-1 Team

Questions? Visit our online wiki: [get.clarityhs.help](https://get.clarityhs.help)

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# Data Literacy Institute: Feedback and Embedded Dashboards

# General Feedback?

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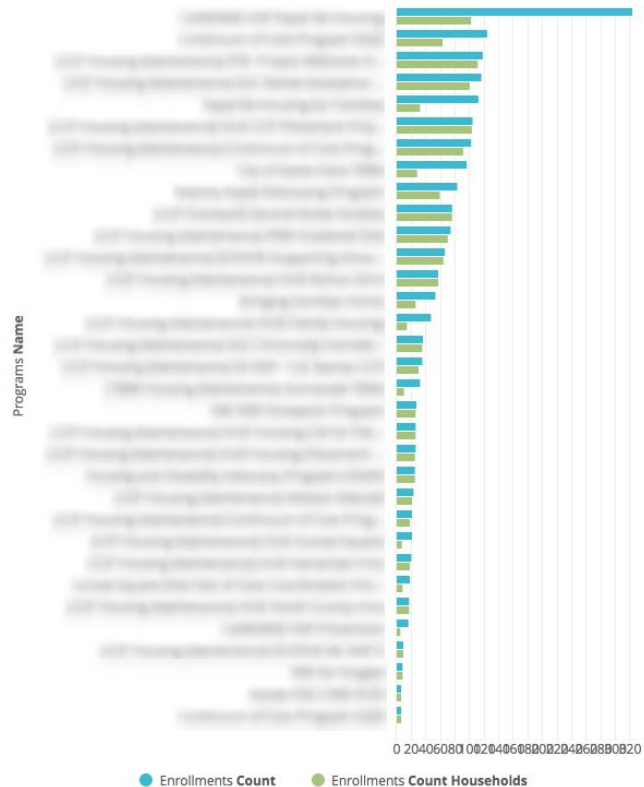
# Embedded Dashboards

Would be available to all Agency Managers when they first log in to Clarity (and accessible through a Dashboard option near the Search tab)

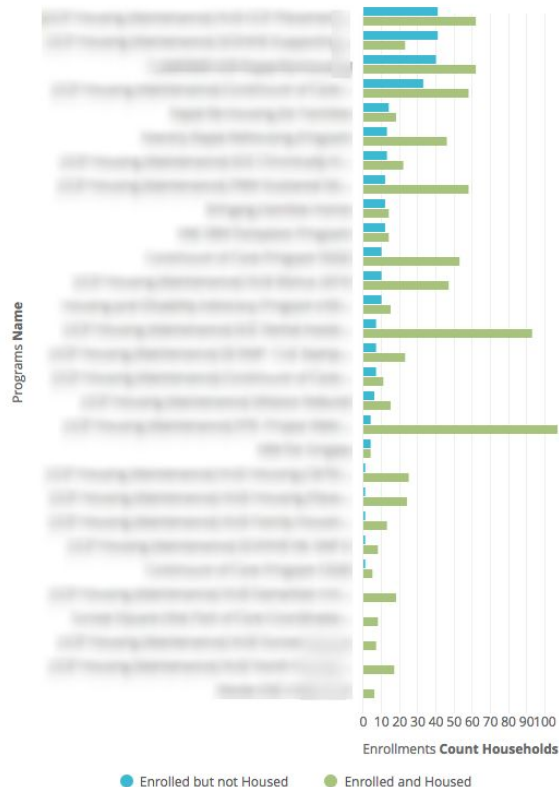
Looking for 2-3 agencies to help preview and test out a default dashboard

Looking for feedback today as well!

Count current active clients/HH by Program



Count PH/RRH with/without move in date



2

Exits to Permanent Destinations in the last month

906

Active Youth

912

Active Veterans

3,213

Chronic Homeless

8,327

Clients with no address in Location tab

Draft Dashboard



# Upcoming DLI Workshops

## Agency Staff:

- Tues, Sept 11, 1-2:30pm | HMIS Data In Action | [in person](#) or [dial-in](#)
- Wed, Nov 7, 1-2:30pm | How to Request Data | [in person](#) or [dial-in](#)
- Tue, Feb 12, 9:30-11:30am | Statistics, Charts, and Graphs | [in person](#)
- May (TBD) | Data Quality

## Agency Manager:

- Thurs, Nov 1, 1:30-2:30pm | Planning for Data Requests
- Thurs, Feb 7, 1:30-2:30pm | How to Tell Your Story
- Thurs, May 2, 1:30-2:30pm | Data Quality

Location and dial in same as HMIS Agency Admin meetings

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# CDQI: Longitudinal System Analysis (LSA) Report



# LSA Background

In the past, CoCs would submit the Annual Homeless Assessment Report (AHAR) on an annual basis. The AHAR is a national-level report that provides information about homeless service providers and people and households experiencing homelessness. It informs strategic planning for federal, state, and local initiatives designed to prevent and end homelessness.

This year, HUD has redesigned the AHAR report and replaced it with the Longitudinal System Analysis (LSA) report. The LSA will be due in late Nov / early Dec and cover the federal fiscal year of 10/1/17 - 9/30/18.

Over the next few months, we will be asking agencies to review their data to prepare for the LSA.





# LSA Overview

- Includes five project types: ES/SH/TH (reported as a combined group), RRH, and PSH
- Focuses on adults and heads of household – age is the only demographic reported for non-heads of household under 18
- Report includes data on demographics, length of time homeless, information on specific populations such as veterans and chronically homeless persons, housing outcomes
- Includes not just the federal fiscal year, but includes some historic data prior to the FY as well
- The LSA is a much larger report than the AHAR and requires the upload of a csv file instead of manually entering the data (for example, one table in the LSA is about 4 times the size of the entire AHAR report)



# This Month, Continued Focus On: Project Inventory

Let Bitfocus know if:

There have been any changes to your **bed / unit inventory** since the HIC/PIT (or your last update):

- What the new bed inventory is
- What was the date of the inventory change

**Any programs ended or started:**

- If the program ended, the end date (please make sure all clients are exited from the program!)
- If the program started, please fill out the Program Request Form (<http://scc.hmis.cc/client-forms/>)



## **This Month, Continued Focus On:**

- Household Review
- Move-In Date for PSH and RRH projects
- Exit Destination
- Income

This review will help both the System Performance Measures and LSA for the year covering 10/1/17 to 9/30/2018



## Additional Notes

Bitfocus is preparing to send specific data quality reports to Agency Administrators, in preparation for the LSA. Please look out for these requests via email this month!

# Households Review

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 6/30/18

Review the household groups:

- If you notice that clients are missing, add them to the household.
- If clients should be grouped together, contact the Help Desk

Program Roster Report

Sample report - test client data

Enrolled within [06/01/2017 - 11/30/2017]

Client

Unique Identifier

Birth Date

Age At Entry

Current Age

Enroll Date

Exit Date

LOS

Assessments

Services

Assigned Staff

Program: Baltimore Emergency Shelter

Larina, Tanya

128CB485D

10/11/1958

58

59

06/01/2017

07/01/2017

30

0

2

A. Admin

Katya, Ivanove

54F117E34

10/11/1987

29

30

06/06/2017

06/08/2017

2

0

1

A. Admin

Katya, Ivanove

54F117E34

10/11/1987

29

30

09/01/2017

09/01/2017

0

2

0

A. Admin

Gnatenko, Tatyana

CE74C00E6

12/11/1948

68

68

06/01/2017

06/13/2017

12

0

1

A. Admin

Gnatenko, Lena

86890AD3B

12/10/1958

58

58

06/01/2017

06/01/2017

0

0

0

A. Admin

Gnatenko, Ivar

F2A73252C

10/10/1948

68

69

06/01/2017

06/01/2017

0

0

0

A. Admin

Rick, Ilona

379D9DA8B

12/10/1958

58

58

06/01/2017

06/01/2017

0

0

0

A. Admin

Rick, Lisa

5F6EA0FE1

12/11/1928

88

88

06/01/2017

06/13/2017

12

0

1

A. Admin

Rick, Ostap

2CC316F74

10/10/1928

88

89

06/01/2017

06/01/2017

0

0

0

A. Admin

Katya, Ivanove

54F117E34

10/11/1987

30

30

10/24/2017

10/24/2017

0

0

0

A. Admin

McFly, Lorraine

F0FDDF0C9

05/09/1952

65

65

07/13/2017

07/13/2017

0

0

0

A. Admin

McFly, George

066D45587

10/01/1950

66

67

07/13/2017

07/13/2017

0

0

0

A. Admin

Katerinka, Alson

D91FEB7E8

10/10/1980

36

37

07/01/2017

07/01/2017

0

0

0

A. Admin

Kate, Alson

07D7D9F73

-

-

-

07/01/2017

07/01/2017

0

0

0

A. Admin

Katya, Testscreen

06C75DF7D

10/11/1987

29

30

08/02/2017

08/02/2017

0

0

0

A. Admin

Ivanova, Katya

94DD95487

10/01/1985

31

32

06/01/2017

06/01/2017

0

0

0

A. Admin

Katya, Testemailtemplates

8DCE26718

10/11/1987

29

30

06/01/2017

06/01/2017

0

0

0

A. Admin

Kate, Alson

07D7D9F73

-

-

-

11/10/2017

-

20

0

0

A. Admin

Mouser, Michael

F08851A1B

10/10/1985

32

32

11/15/2017

-

15

0

0

M. Shaw

Mouser, Micky

A4588D705

02/25/2013

4

4

11/15/2017

11/16/2017

1

0

0

M. Shaw

# Housing Move-In Date

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 6/30/18

For PSH and RRH programs, check the Housing Move-In Date

- If household moved into housing and the Housing Move-In Date is “undefined”, the Housing Move-In Date needs to be added
- If the Housing Move-In date is not accurate (e.g. is before the program start date), it should be updated

Program Roster Report

Jenn Test Agency

Active within [05/01/2017 - 05/02/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: EAP Demo Program											
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	07/01/2017	-	306		0	3	J. Ong
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	07/01/2017	-	306		0	1	J. Test5
Program: Jenn Test HP Prevention Program											
Potato, Hot	BE2456D1C	01/01/1980	38	38	01/02/2018	-	121		0	1	J. Ong
Program: RRH											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	11/01/2015	-	914	undefined	0	0	J. Ong
Cotta, Ri	3B830C101	01/01/2010	5	8	11/01/2015	-	914	undefined	0	0	J. Ong
Tea, Ginger	53Q20163C	02/01/2015	0	3	11/05/2015	-	910	undefined	0	0	O. Jenn
Tea, Jasmine	6A120C62D	01/01/1998	17	20	11/05/2015	-	910	undefined	0	2	O. Jenn
Lo, He	9A22165C7	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Lo, Je	BAD9F1241	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Client, Hello	E869E4460	01/01/1980	37	38	03/01/2017	-	428	undefined	0	0	J. Ong
Daniel, Dear	996EDFD20	01/01/2015	2	3	08/01/2017	-	275	undefined	0	2	J. Ong
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	03/01/2017	-	428	undefined	0	3	J. Ong
Cat, Allie	9FFB3597F	01/01/2010	7	8	09/01/2017	-	244	undefined	1	0	J. Ong
Cat, Bob	901BCEED5	01/01/2010	7	8	09/01/2017	-	244	undefined	1	2	J. Ong
Cola, Coca	171F67E3C	01/01/2000	17	18	09/01/2017	09/21/2017	20	undefined	0	0	J. Ong
Cola, Ri	4152D2D03	01/01/1980	37	38	09/01/2017	09/21/2017	20	undefined	1	0	J. Ong
Client, Anonymous	EEC147421	-	-	-	10/01/2017	-	214	undefined	0	0	J. Ong
Program: CoC Outreach											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	07/01/2017	-	306		0	0	J. Ong

# Destination and Income

1. Run the [HUD-225] HMIS Data Quality Report for your programs

**Choose Program Type(s)**

Choose...

- All
- Emergency Shelter
- Transitional Housing
- PH - Permanent Supportive Housing (disability required)
- Street Outreach
- Services Only
- Other
- Safe Haven
- PH - Housing Only
- PH - Housing with Services (no disability required)
- Day Shelter
- Homeless Prevention
- PH - Rapid Re-Housing
- Coordinated Assessment

**Choose Program Status**

All Programs

**Choose Program(s)**

Choose...

- All
- Demo RHY Program
- Demo SSVF Program (RRH)
- Demo Standard CoC Program
- Outreach

**Enter the starting report date**

2015/10/01

**Enter the ending report date**

2016/09/30

**Choose Report Mode**

Regular Report

**Choose Report Format**

Web Page PDF Excel

2. Review Q4 (Destination and Income)

Q4. Income and Housing Data Quality		
Program Applicability: All Projects		
Data Element	Error Count	% of Error Rate
Destination (3.12)	28	4.99%
Income and Sources (4.2) at Entry	7	0.77%
Income and Sources (4.2) at Annual Assessment	185	74%
Income and Sources (4.2) at Exit	7	2.47%

# Destination: What to look for

## Issue:

On the Program End screen, “Destination” is:

- Client doesn’t know
- Client refused
- No exit interview completed
- Data not collected
- Missing

## How to fix:

If the client’s exit destination is known, update the “Destination” on the Program End screen

### End Program for client Bunya Cotta

Program Exit Date	12/14/2015 
Housing Status at Exit	Category 1 - Homeless 
Destination	Data not collected 



# Income at Entry/Exit: What to look for

## Possible Issues:

### 1. “Income from Any Source” is:

- Client doesn’t know
- Client refused
- Data not collected
- Missing

OR

2. “Income from Any Source” is Yes, but no specific income sources are checked

## How to fix:

1. On the Enrollment or End screens, update “Income from Any Source” question
2. If a client does receive income, make sure to report the type of income (and the amount)

Cash Income for Individual	
Income from Any Source	<div>Yes</div>
Earned Income	<input type="checkbox"/>
Unemployment Income	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Income (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Social Security Retirement	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Employment Pension	<input type="checkbox"/>
TANF (Temp Asst for Needy Fam)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	0.00

If Income = Yes, check off the income source(s) received



# Income at Annual Assessment

## Possible Issues:

Same issues as Income at Entry or Income at Exit

OR


Annual Assessment is not entered correctly

## How to fix Annual Assessment:

1. If the client has been in the program for more than a year, make sure an Annual Assessment was completed
2. Make sure Annual Assessment is dated within 30 days before / after the anniversary of program entry

# Next Month's Meeting Time and Location

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# Next Agency Admin Meeting: Thurs, Oct 4 from 2:30-3:30pm

**At our regular meeting location:** Sobrato Conference Center, Milpitas  
600 Valley Way, Room 1  
Milpitas, CA 95035

The **Performance Management Work Group** will take place right before it, from 1:30-2:30pm, in the same location.

Dates and locations for 2018 meetings are listed on the OSH website:

<https://www.sccgov.org/sites/osh/continuumofcare/osh-events/pages/home.aspx>

**Q&A**

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