HMIS Agency Administrators Meeting

Oct 4, 2018

Agenda

1. CoC / Coordinated Assessment / UPLIFT
2. Report Deadlines
3. HMIS Newsletter
4. Data Literacy Institute Updates
5. Clarity Human Services Feature Updates
6. Guidelines for Exiting Clients
7. Santa Clara County (OSH) Reports
8. CDQI: Longitudinal System Analysis (LSA) Report

CoC / Coordinated Assessment / UPLIFT / Bitfocus Updates

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	Dec 31	Will be a CSV export instead of manual entry
SSVF Upload (CSV 6.11)	Oct 1 - 9	
RHY Upload (CSV 6.12)	Nov 12 - 30	Report covers 10/1/17 - 9/30/18

HMIS Newsletter

HMIS Newsletter

Will be sent out monthly to all HMIS users

Sept 2018 Newsletter included:

- New Features in Clarity Human Services!
- Data Literacy Institute
- What to Do When Staff Leave
- Data Quality Lab
- Report Spotlight: [DQXX-103] Monthly Staff Report
- Upcoming Events

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

CLARITY
HUMAN SERVICES

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!

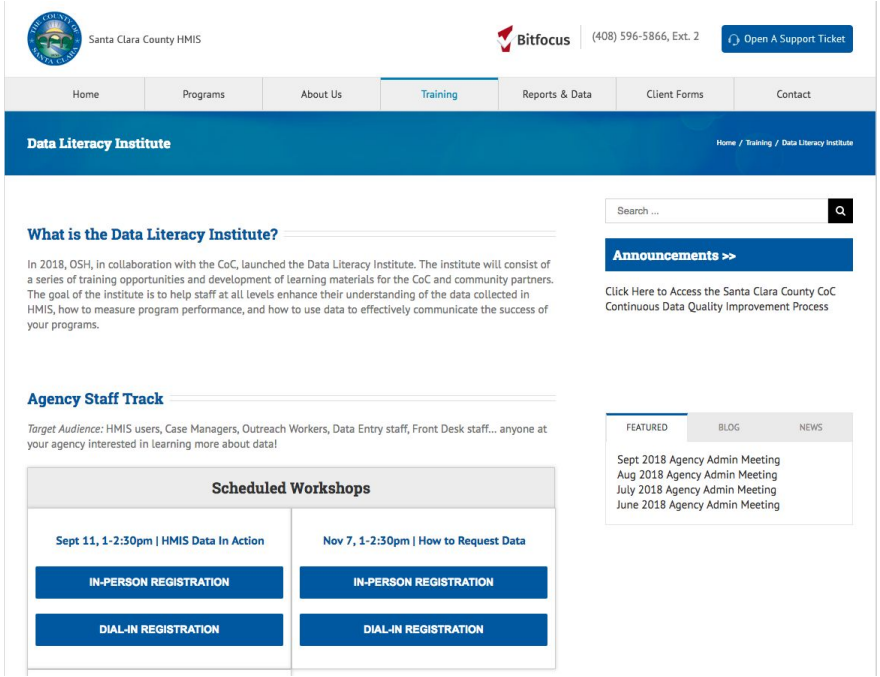
Data Literacy Institute Updates

New Webpage on SCC HMIS Site

Under Training -> Data Literacy Institute

http://scc.hmis.cc/training/data-literacy-institute/

Includes information about upcoming workshops and resources from past workshops



Update to Nov Agency Staff Workshop

Current topic: How to Request Data

After some discussion, there was a suggestion to change this topic to focus more on practical work for HMIS users (example - a deeper dive into reports that help you with specific topics)

Upcoming DLI Workshops

Agency Staff:

- Wed, Nov 7, 1-2:30pm | How to Request Data | in person or dial-in (subject to change)
- 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

Clarity Human Services Feature Updates

Clarity Human Service Feature Updates

- Count of Days Pending for Coordinated Entry Referrals
- Improved Referral History Tracking
- “Refer to Queue” Button Is Now More Visible
- Update Queue with Most Recent Assessment Score
- Additional Referral Denial Reasons and Updates to Email Notifications
- Refinement to Programs Available on Eligibility Determination Screen
- **NEW!** Client Report Updates

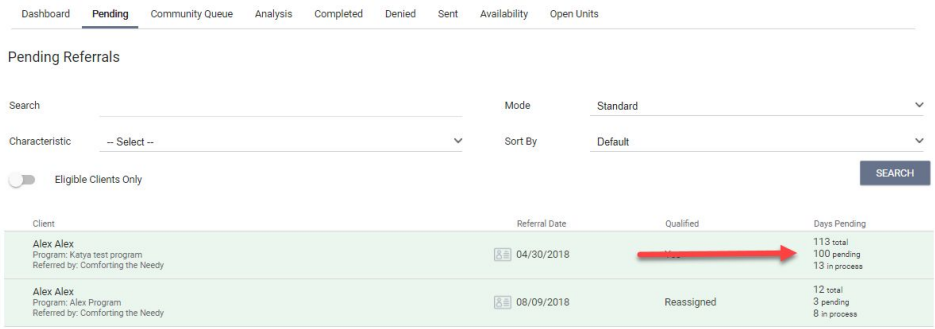
Days Pending for Coordinated Entry Referrals

In the Referrals->Pending tab,:

Total: Number of days since a referral was first created/added to the queue.

Pending: **New!** Number of days between the date a referral was sent to your program and the date the Status of the referral was changed to "Pending - In Process."

In Process: Number of days since a referral Status was changed to “Pending - In Process."



Improved Referral History Tracking

Activity: More activities are included, with clearer labels and more info

Date: Now includes both the activity date, as well as the timestamp indicating when the activity took place in the system.

Staff: Includes the staff person performing the activity in the system, as well as the agency they were logged in under while performing the activity.

HISTORY

Activity	Date	Days Pending	Staff
Removed from Community Queue: Referral time expired	09/04/2018 2018-09-04 10:40:20	8	Admin Admin Comforting the Needy
Check-In	08/27/2018 2018-08-27 11:57:00	4	Mike Reed Comforting the Needy
Denied, reassigned to Community Queue	08/23/2018 2018-08-23 09:21:58	3	Sarah Dougherty Pride Industries
In Process: Williams Apartments, Pride Industries	08/20/2018 2018-08-20 02:34:34	10	Sarah Dougherty Pride Industries
Program Referral: Williams Apartments, Pride Industries	08/20/2018 2018-08-20 02:34:34	10	Danielle Robadey CAL Housing Authority
Added to Community Queue	08/10/2018 2018-08-10 02:43:19	0	Mike Reed Comforting the Needy

“Refer to Queue” Button Is Now More Visible

Now right below the VI-SPDAT score!

Please reminder your users to click this button after conducting the VI-SPDAT if the client is a Veteran or their score is >3

VI-F-SPDAT Score Summary

GENERAL	0
HISTORY OF HOUSING & HOMELESSNESS	0
SOCIALIZATION & DAILY FUNCTION	0
FAMILY UNIT	0
VI-F-SPDAT PRE-SCREEN TOTAL	**0**

REFER DIRECTLY TO COMMUNITY QUEUE

Update Queue with Most Recent Assessment Score

If a client is on the queue and a new VI-SPDAT assessment (of the same type) is conducted, the referral will autoupdate to link to the most recent assessment.

Referrals were updated last week to reflect the most recent assessment. Users may have received email notifications when this occurred - no action is needed on their part.

HISTORY

Activity	Date	Days Pending	Staff
Removed from Community Queue: Referral time expired	09/04/2018 2018-09-04 10:40:20	8	Admin Admin Comforting the Needy
Check-In	08/27/2018 2018-08-27 11:57:00	4	Admin Admin Comforting the Needy
Assessment Score Updated (view Previous assessment)	08/23/2018 2018-08-23 12:12:23	0	Admin Admin Comforting the Needy

Additional Referral Denial Reasons and Updates to Email Notifications

Denied Reasons have been reviewed by the OSH MatchMakers, and have been 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

Specific changes were discussed at last month's Agency Administrator meeting and are covered in the HMIS newsletter

Refinement to Programs Available on Eligibility Determination Screen

For agencies who accept referrals through HMIS for Rapid Re-Housing, Permanent Supportive Housing, or Transitional Housing programs, users may have noticed options to refer a client directly to these programs on the Eligibility Determination screen. While these options displayed on Eligibility Determination screen, should not be used and caused mistaken referrals and confusion.

We've updated the Eligibility Determination screen to remove the option to refer directly to those programs.

Client Report Updates: [CLNT-125] Client Summary

Report Location: Client Reports

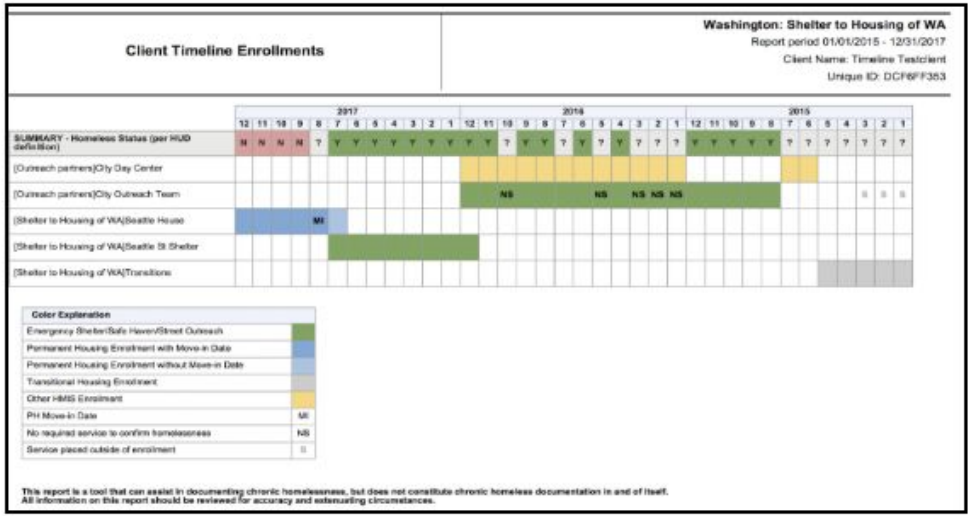
Report update: Emergency Shelter section now includes whether the program is Entry-Exit (i.e. the client is considered as staying all days between entry and exit) or Night-by-Night (e.g. BRC, where clients need to be checked in every night). If you click the number of nights of shelter for night-by-night, it will list out the specific nights the client checked in.

Housing Information	
How many program stays in Emergency Shelter:	5
Length of stay in each Emergency Shelter program stay:	09/29/2008 - 12/30/2008 = 92 days Exit Destinaton: Other
	09/21/2013 - 09/21/2013 = 0 day Exit Destinaton: Client doesn't know
	03/22/2015 - 03/23/2015 = 1 days (Night by Night: 1 nights) Exit Destinaton: Client doesn't know
	01/25/2017 - 01/31/2017 = 6 days (Night by Night: 1 nights) Exit Destinaton: Staying or living with friends, temporary tenure
	03/09/2018 - active = 208 days (Night by Night: 0 nights)

Client Report Updates: [CLNT-127] Homeless Status Timeline:

Report Location: Client Reports

New Report: Provides information on shelter stays, outreach contacts, etc. While not considered documentation of chronic homelessness, the report can help show what is currently entered in HMIS.



Guidelines for Exiting Clients

General Guidelines for Exiting Clients

From the 2017 HMIS Data Standards Manual:

Project Exit Date =

- **Residential projects (e.g. shelters, transitional housing, PSH, RRH):** The last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.
- **Non-residential projects (e.g. drop-in centers, outreach, supportive services):** the last day a service was provided or the last date of a period of ongoing service.

Each individual client in a household will have their own Project Exit Date. If one member of a household leaves the project before the rest of the household, the exit date should reflect the actual day that client left the project.

Residential Projects (Shelter & Housing)

General Example:

If a person entered transitional housing on January 1, 2018 and left on June 30, 2018, the Project Exit Date for that transitional housing stay would be June 30, 2018.

Note for Rapid Rehousing:

Clients in rapid re-housing projects are to be exited after the last RRH service is provided. If eligible RRH case management services are provided past the final date of receiving rental assistance, for example, the client must not be exited until those services cease.

RRH Example: If a person's rental assistance ended on June 30, 2018, but they continue to receive case management until July 31, 2018, the Project Exit Date should be July 31, 2018

Non-Residential Projects (Outreach, Drop-In)

The Project Exit Date is the last day an Outreach contact was made or a service was provided

Examples:

- If a person has been receiving weekly counseling and either formally terminates their involvement or fails to return for counseling, the last date of service is the date of the last counseling session.
- In Street Outreach, clients may be exited when the outreach worker has been unable to locate the client for an extended period of time. In addition, the client may be exited upon entering another project type, finding housing, engaging with another outreach project, or passing away.

Note: If a client uses a service for just one day (i.e.,starts and stops before midnight of same day), then the Project Exit Date may be the same as the Project Start Date.

For High-Volume Programs: Auto-Exit Feature

The Auto-Exit feature may be helpful if your agency has a program that serves clients whose exit date is not well defined:

- Street Outreach
- Night-by-Night Emergency Shelters (shelters that use the Attendance tool to check clients in every night)
- Drop in centers or other programs where you may not know if the client will return to the program in future

What is Auto-Exit?

If Auto-Exit is enabled for a program, Clarity will automatically exit a client from the program if there have been no services attached to the program enrollment within a set number of days:

- Exit date will equal the date of the last service attached to the enrollment (or will equal the start date if the client has no services)
- All other exit destination information will be left blank

If your agency is interested in this feature, please contact Bitfocus

Santa Clara County (OSH) Reports

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, Focus On:

- All clients served during the report period are entered in HMIS
- Household Review
- Move-In Date for PSH and RRH projects
- Data Quality
- If you've done the above, exit destination is correct

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

All Clients Served and Households Review

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 9/30/18

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
- If clients have exited but there is no Exit Date, exit them

Program Roster Report Sample report - test client data **Bitfocus System**

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

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Assess-ments	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

Wed Nov 15 11:32:13 AM 2017 1 / 2 Powered By CLARITY HUMAN SERVICES

Housing Move-In Date

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 9/30/18

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

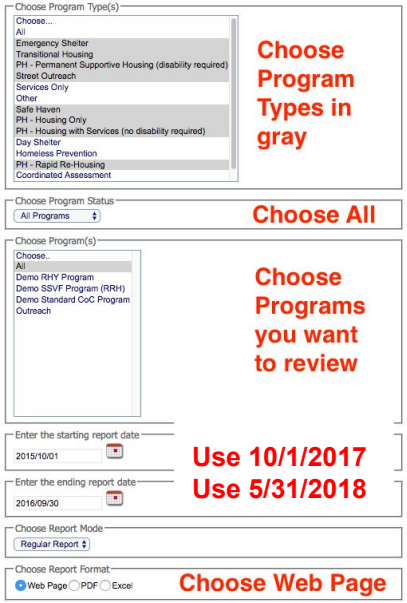
Jenn Test Agency
Active within [05/01/2017 - 05/02/2018]

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	53020163C	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	-	-	03/01/2016	-	823		0	0	J. Ong

Destination and Income

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



2. Review data quality issues

Q4 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

Q4 Income at Entry/Exit: What to look for

Possible Issues:

1.“Income from Any Source” is:

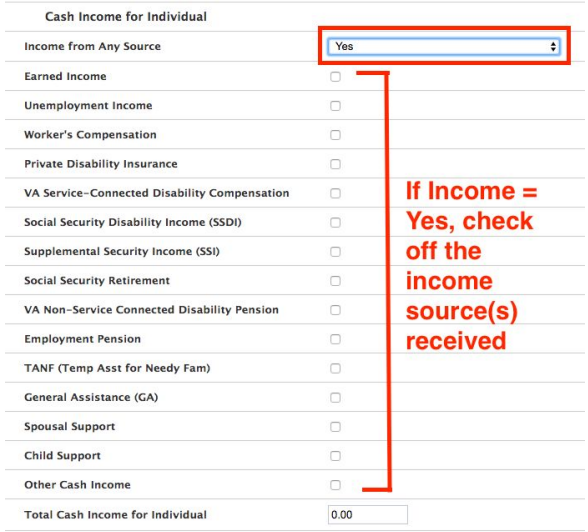
- Client doesn’t know
- Client refused
- Data not collected
- Missing

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)



Q4 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

Exit Destination

For an overall view of how many clients exit to different destinations, run the [HUDX-227] Annual Performance Report for the period of 10/1/17 to 9/30/18

Review the exit destination question for accuracy

For a client-by-client view of exit destinations, run the [GNRL-220] Program Details Report for the period of 10/1/17 to 9/30/18 and choose Screen Type = ‘Exit Data’

Review the exit destination column for accuracy

Next Month’s Meeting Time and Location

Next Agency Admin Meeting: Thurs, Nov 1 from 1:30-3:30pm

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

The first hour of the meeting will be a **Data Literacy Institute** session for Agency Managers. Please feel free to invite anyone who may be interested to attend!

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