May 2018 Agency Admin Meeting

Date: Thursday, May 3, 2018
Time: 1:30 – 3:30PM
Place: The Health Trust Boardroom
3180 Newberry Dr., Suite 200
San Jose, CA 95118

Slides from the meeting can be found here:

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HMIS Agency Administrators Meeting

May 3, 2018

Please use this link to download slide deck if desired.

Click this link to view April's HMIS Newsletter

Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. HMIS Data Standards and VA Updates
3. Housing Inventory Count (HIC) and Point In Time Count (PIT) Updates
4. HMIS Newsletter
5. Training Updates
6. Data Literacy Institute – Feedback Needed!
7. Auto-Exit for Outreach and Emergency Shelter
8. Merging Duplicate Profiles
9. Agency Staff Deletion Rights
10. System Performance Measures (SPM)

Next Agency Admin Meeting:

Thurs, June 7 from 1:30-3:30pm

Location: Sobrato Conference Center, Milpitas
600 Valley Way, Room 1
Milpitas, CA 95035

Dates and locations for 2018 meetings are listed on the OSH website:
https://www.sccgov.org/sites/osh/continuumofcare/osh-events/pages/home.aspx

CoC / Coordinated Assessment / UPLIFT Updates

1. Annual Report coming out soon, presented to supervisors May 8th
1. County OSH Event May 14th 2-4pm. There will be an overview of the report and round table discussion. Please RSVP to the email received as seating is limiited.
1. Coordinated Assessment Working Group meets at The Health Trust May 10th
1. UPLIFT 278 stickers remaining, reminder – please don't back date referrals.

Additional Updates

- All versions of the **VI-SPDAT** now include a question to track PFN. Please enter this information if applicable. If this does not apply to the client, leave the question blank.
- When you are requesting **UPLIFT** passes, service transactions are labeled ***Admin Use Only* [UPLIFT].** Please do not edit/create/delete these services! They are used by OSH to acknowledge that the badge/sticker has been issued to the client.

HMIS Data Standards and VA UpdatesMIS Data Standards and VA Updates

HUD released version 1.3 of the 2017 HMIS Data Standards with some minor updates:

- **R6 Employment Status** required for SSVF programs:
  - Tracks if Head of Households and Adults are Employed, and if employment is full-time/part-time/seasonal. If not employed, tracks why they are not employed (looking for work, unable to work, not looking for work)
  - Collected at start and exit
- **R19 Safe and Appropriate Exit** questions no longer required for RHY BCP – Prevention programs

These updates are live in HMIS. Updated printable forms will be posted on the SCC HMIS website soon.

Additional VA Guidance for SSVF Projects

- Once **R6 Employment** questions are available, SSVF projects will need to back-enter data for all head of households and adults at program entry. The VA will check for data quality in the R6 Employment Status field in the June 2018 upload period for all SSVF HMIS Repository Uploads for clients served as of May 1, 2018.
- HUD's current definition of "Veteran" excludes those individuals who attended training but were discharged before reporting to a duty station. However, effective immediately, it is expected that SSVF grantees will serve this group of Veterans if they are otherwise eligible for services.
  - The **3.7 Veteran Status** for clients served under this expanded SSVF program eligibility criteria (where SSVF projects can serve clients who only had service time in Basic Training) should be entered with a **3.7 Veteran Status** of "No" in HMIS, as stated in the HMIS Data Manual.
- Documentation of the client's eligibility for the project should be retained on file for the client for monitoring purposes, and this guidance can be saved as backup to explain the apparent discrepancy between the client file and the HMIS record.

Housing Inventory Count (HIC) and Point In Time (PIT) Count

Thank you!

- Thanks to everyone for helping with the Housing Inventory Count (HIC) and Point In Time Count (PIT)!
- The HIC and PIT were submitted on time, by the April 30 deadline. HUD will review the information and ask follow-up questions if needed.
- HIC and PIT results will be shared after HUD finishes their review.

HMIS Newsletter

Will be sent out monthly to all HMIS users

April 2018 Newsletter included:

- Group Enrollments (i.e. enrolling household members)
- Non-Cash Benefits Update
- VA / RHY Updates
- Report Spotlight: Client Reports

Web link to the newsletter: https://us12.campaign-archive.com/?u=88fdcce84b81507229a5c8227&id=7f790d6126

Training Updates

Short video trainings are now available on the Bitfocus YouTube channel:

The General Training Video playlist includes videos such as:

- Searching for a client
- Program Enrollment
- Creating a Public Alert

A training playlist for the Looker Data Analysis tab will be released in the future

Update to Looker Data Analysis Training

Current:

- Two webinar sessions (training and a "hands on" session)

New:

- One video training
- Weekly live Q&A calls where users can ask their Looker questions

Goal is to better respond to Looker questions as they come up

View the training video and register for the Q&A calls on the SCC HMIS website, under Schedule a Training: http://scc.hmis.cc/training/schedule-a-training/

Data Literacy Institute – Feedback Needed!

- Goal is to enable agencies and users to have greater insight into their work through data.
- Activities: Assist Agency Managers to dive deeper into their data, learn to develop non-public Dashboards and Visualizations, and System Monitoring tools that assist Agencies to determine project success.
- Support HMIS users on common Data Literacy topics.
- Examples:
  - how to frame a question with a common definition,
  - how to analyze data that is extracted,
  - what are the best types of visualizations for specific types of data, etc.

We want your feedback!

- What would you most like to see in a Data Literacy Institute?
- What topics/tools would be helpful for
  - Agency Managers?
  - Executives at your agency? (Example: how to frame requests for data)
  - HMIS users? (Example: review of how the data they entered is used, how to monitor their data, etc)

Some related feedback from the User Satisfaction Survey:

- Reports training for HMIS users (how to pull demographics, useful reports,

Feedback – suggestions offered

- More drilldown on reports
- Creation of dashboards
- Ability to see data on specific populations
- Numbers of referrals vs program enrollments
- Retention in Permanent housing
- How do data fields show up in reports

User Training should be hands on. This could be challenging to schedule so that all users could be present.

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

Auto-Exit Pros and Cons

Pros:

- Helps data quality – prevent enrollments from being left open accidentally
- For high volume programs – helps ease data entry burden

Cons:

- The blank values on the exit page will show up as errors on HMIS data quality reports.
- Looks only at services provided, not status update/annual assessment when determining if the enrollment should be closed.

Note: Auto-Exit should not replace manually exiting the client from the program. If you already know that client will be exiting the program, please exit the client from HMIS and enter their exit information.

Merging Duplicate Profiles

- Occasionally in HMIS, the same client will have more than one client profile created, resulting in two or more different profiles that contain an incomplete record of their HMIS history.
- To avoid duplicate profiles users should search on any combination of name (shortened name eg 1st 3 letters of first and last name) Date of Birth and last 4 SSN.
- Duplicate profiles can result in overcounting in system-wide reports, and make it more difficult to serve the client effectively (example: making it harder to locate the client with a referral if some of their service history is under a different profile).
- This month, Bitfocus will be doing a review of duplicate profiles in HMIS and merging duplicate profiles.
- Bitfocus may contact your agency to help verify duplicate client profiles.

If 2 profiles for the same client are merged:

- A "primary" profile is chosen that contains the information from the Client Profile screen (name, date of birth, etc)
- All other history – services, program enrollments, ROI, assessment s(VI-SPDAT), notes, files/forms from both profiles will be available under the primary profile
- Users will still be able to search for the client using both Clarity Unique Identifiers (the second identifier will be stored in the "Alias" field)

Bitfocus may contact you with questions about possible duplicate profiles

If your agency finds duplicate profiles for a client at any time, please contact our Support Team at sccsupport@bitfocus.com with the following information:

- The Unique Identifiers for the profiles that need to be merged
- Which of the two profiles has more complete client profile information (name, date of birth, race, etc)

Agency Staff Deletion Rights

Right now, only users with an Agency Manager account can delete services and program enrollments for their agency. There have been a small number of requests for non-Agency Manager staff to have the ability to delete items in HMIS.

Are there users at your agency that need the ability to delete services and program enrollments? If so, how many? Are there concerns about giving users this level of access?

Continuous Data Quality Improvement (CDQI): System Performance Measures

- HUD requires communities to measure their performance as a coordinated system and annually report that in the form of HUD System Performance Measures. HUD required System Performance Measures for the first time in 2016.
- The HUD System Performance Measures report is due to HUD by 5/31
- The report covers 10/1/16 to 9/30/2017 – we will also have the option to update last year's submission if needed (10/1/15 to 9/30/16)
- The report is also run regularly over different time periods by OSH to review progress towards CoC-wide goals

System Performance Measures

1. Length of Time Persons Remain Homeless
1. Returns to Homelessness within 6 to 12 months
1. Number of Homeless Persons
1. Employment and Income Growth
1. Number of Persons who become Homeless for the First Time
1. *N/A*
1. Successful Placement in or Retention of Permanent Housing

The SPM also includes data from the [HUDX-225] HMIS Data Quality Report:

- Unduplicated Persons Served (HMIS)
- Total Leavers (HMIS)
- Destinations of Don't Know, Refused, or Missing (HMIS)

Last Month's Action Items

1. Review data quality/completeness using the **[HUDX-225] HMIS Data Quality Report**
1. Review households using the **[GNRL-106] Program Roster**
1. Review data accuracy using the **[GNRL-220] Program Details Report**

This Month – Focus On

- Household Review
- Move-In Date for PSH and RRH projects
- Exit Destination
- Income (for CoC funded projects)

Households Review

1. Run the [GNRL-106] Program Roster for the period of 10/1/16 to 9/30/17
2. 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

Housing Move-In Date

1. Run the [GNRL-106] Program Roster for the period of 10/1/16 to 9/30/17
2. 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

Destination and Income

1. Run the [HUD-225] HMIS Data Quality Report for your programs
1. Review Q4 (Destination and Income)

Destination: What to look for

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

Income at Entry/Exit: What to look for

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
1. If a client does receive income, make sure to report the type of income (and the amount)

Income at Annual Assessment: What to look for

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
1. Make sure Annual Assessment is dated within 30 days before / after the anniversary of program entry

By Jenn Ong | May 4th, 2018 | Blog, Uncategorized | Comments Off on May 2018 Agency Admin Meeting

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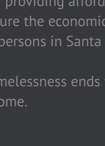

Comments are closed.

"What we learn with pleasure we never forget."

Alfred Mercier

Announcements >>

Click Here to Access the Santa Clara County CoC Continuous Data Quality Improvement Process

Click Here to Access the SCC Clarity Feature Enhancement Request List

FEATURED | BLOG | NEWS

February 2021 Agency Admin Meeting
January 2021 Agency Admin Meeting
December 2020 Agency Admin Meeting

June 2021

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28	29	30				

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