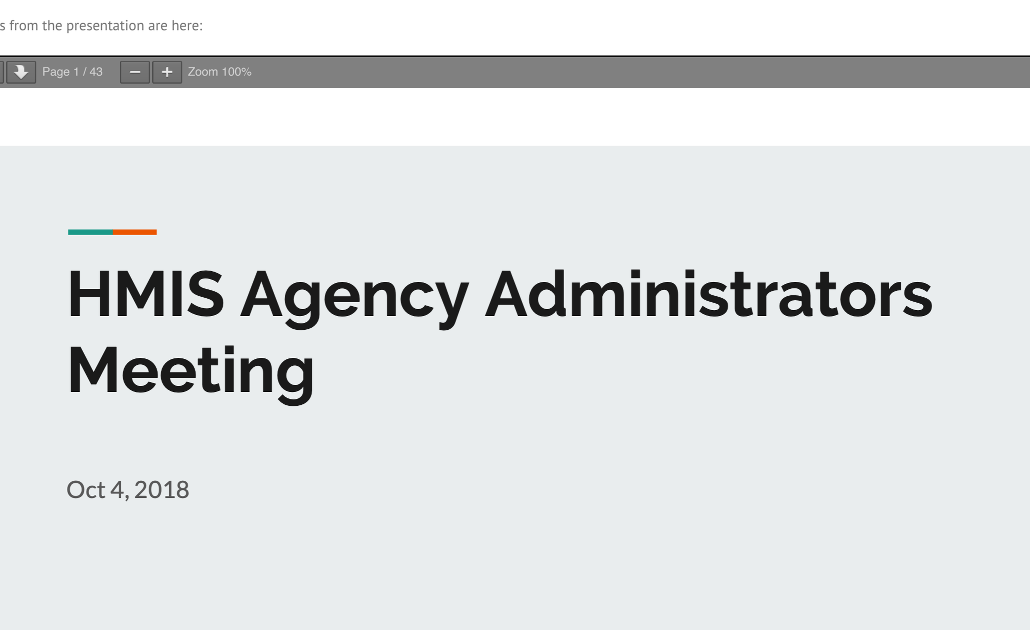
Oct 2018 Agency Admin Meeting

Date: Thursday, October 4th, 2018
Time: 2:30 – 3:30PM
Place: Sobrato Conference Center, Milpitas
600 Valley Way, Room 1
Milpitas, CA 95035

Agency Admin Meeting 2:30 – 3:30

Slides from the presentation are here:



Please use this link to download slide deck if desired.

Link to the September newsletter

Agenda

- CoC / Coordinated Assessment / UPLIFT
- Report Deadlines
- HMIS Newsletter
- Data Literacy Institute Updates
- Clarity Human Services Feature Updates
- Guidelines for Exiting Clients
- Santa Clara County (OSH) Reports
- CDQI: Longitudinal System Analysis (LSA) Report

CoC / Coordinated Assessment / UPLIFT

CoC Updates

- HEAP Funding – CoC is eligible for $17.5 million in state funding to address urgent needs of homeless persons. THe CoC Board is in the process of determining priorities for HEAP funding so we can submit an application by the end of the year. They are gathering input and determining needs. Kathryn sent out a survey via CoC listserve to ask nonprofit organizations about their needs. Please make sure someone in your organization completed it.
- CoC Application was submitted in September. THe application and priority listing is on the OSH website. As a community, we submitted applications for $24.7 million including an application for DV bonus funding.
- HomeBase is scheduling TA visits with all CoC grantees in the next couple of months.
- After the summer/NOFA hiatus, CoC trainings are starting back up. On October 15th there will be a training on Determining and Documenting Client Eligibility.

UPLIFT Updates:

- We have currently distributed 1692 UPLIFT Passes so far of 2500
- Replacement period will begin November 1st ,2018 (11/1/18)
- There is an updated version of the user handbook

http://scc.hmis.cc/wp-content/uploads/2018/09/UPLIFT-User-Handbook-V4-9-6-2018.pdf

- Please note, allocation limits are only for the 1st month of the quarter, after which all left over stickers will be pooled for a first come first serve.
- Allocation Pool period begins (Nov 1st)

Bitfocus Updates

- Lesly Soto will be joining the Bitfocus System Administration team on Monday.
- We may be contacting agencies so we can introduce her and she can get to know you.

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

Will be sent out monthly to all HMIS users

Sept 2018 Newsletter included:

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

Upcoming EventsWeb link to the newsletter

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

- 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.

"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

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.

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.

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

- 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

Leila Qureshi from OSH presented the OSH report.

Slides from the presentation are here:

10. Oct Agency Admin Meeting – 2018-10-02 SH Dashboard Aug_31_2018 _Final

Click here to Link to the OSH website

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

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

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

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 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