HMIS Agency Administrators Meeting

March 1, 2018

Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. Client Privacy Recertification
3. Coordinated Assessment HMIS Reminders
4. HMIS User Survey Results
5. SCC Trainings
6. APR and Sage
7. ROI Reminders
8. Housing Inventory Count (HIC) / Point In Time (PIT) Count
9. Continuous Data Quality Improvement (CDQI)
10. Q&A
11. Time available for HIC/PIT review

Next Agency Admin Meeting: Thurs, April 5 from 2:30-3:30pm

The Performance Management Work Group will meet from 1:30-2:30pm before the Agency Admin Meeting

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

CoC / Coordinated Assessment Updates

1. Coordinated Assessment Workgroup Meeting – Thursday, March 8th, 1-2:30 at The Health Trust board room – will be discussing some new DV policies and the annual Coordinated Assessment System evaluation.

2. CoC Training: Housing First-Centered Case Management – Monday, March 19th, 9:30am -12:30pm at Berger Auditorium (1555 Berger Drive)

3. CoC Membership Meeting – Monday, March 19th, 1-2:30pm at Berger Auditorium (1555 Berger Drive) – Program updates, policy updates, governance charter changes

UPLIFT Updates

1. We have 96 Jan-Mar'18 UPLIFT stickers left. These stickers are available to every UPLIFT agency First Come, First Served.

2. Apr-Jun'18 allocation information will be emailed on 3/9/2018 to everyone on UPLIFT email distribution list.

3. 1st day to send Apr-Jun'18 UPLIFT referral: 3/16/2018. Any Apr-Jun'18 referral before 3/16/2018 will not be picked up by UPLIFT report

Client Privacy Recertification

Client Privacy Recertification

Every year, HMIS users are required to retake the Client Consent training and recertify

The new Client Consent training is in the works and will be added to the SCC HMIS website:
http://scc.hmis.cc/training/schedule-a-training/

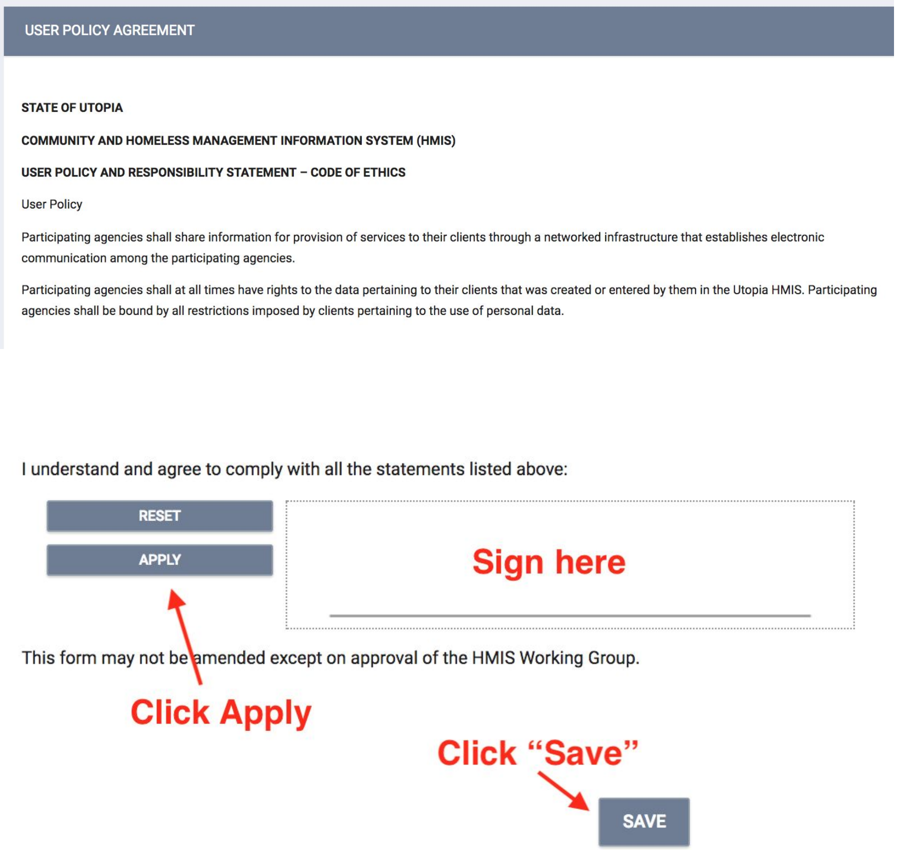
Recertification process:

- Users will be asked to watch the Client Consent training
- On a specific date, HMIS users will be required to fill out a recertification form the next time they log in to HMIS, to verify that the watched the consent training
- An email will be sent to all users with instructions

Recertification Form: Preview

When users are required to recertify, they will:

1. Log in to HMIS
2. An electronic user agreement will appear - read the form
3. Sign the agreement and click "Apply"
4. Click "Save"


USER POLICY AGREEMENT

STATE OF UTOPIA

COMMUNITY AND HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)

USER POLICY AND RESPONSIBILITY STATEMENT – CODE OF ETHICS

User Policy

Participating agencies shall share information for provision of services to their clients through a networked infrastructure that establishes electronic communication among the participating agencies.

Participating agencies shall at all times have rights to the data pertaining to their clients that was created or entered by them in the Utopia HMIS. Participating agencies shall be bound by all restrictions imposed by clients pertaining to the use of personal data.

I understand and agree to comply with all the statements listed above:

RESET

APPLY

This form may not be amended except on approval of the HMIS Working Group.

SAVE

End User Agreement Updates

Along with the recertification process, a new version of the End User Agreement will be released, pending final approval.

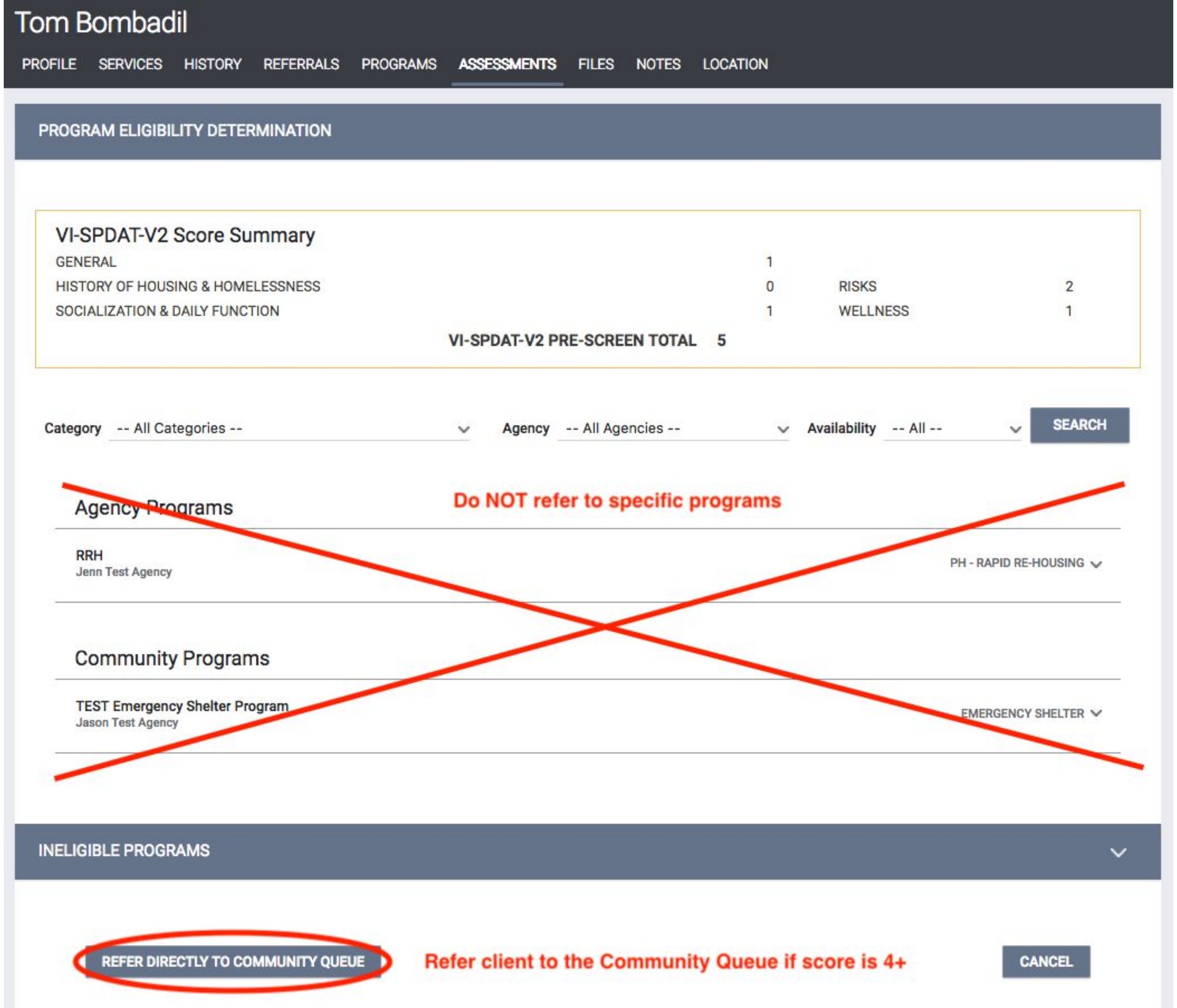
Main changes include:

- Added language describing an End User's responsibilities for coordinated entry and the VI-SPDAT
- Replaced Initial boxes with bullet points
- Removed Technical Administrator signature - ***Technical Administrators are still required to submit new login requests***

Coordinated Assessment HMIS Reminders

Coordinated Assessment Reminders / Updates

- Make sure the client has a valid ROI before entering the VI-SPDAT into HMIS
- Check HMIS to see if the client has had a VI-SPDAT in the past year
- After completing the VI-SPDAT, don’t forget to click the “Refer Directly to Community Queue” button if the score is 4 or higher
- Important: do not refer to any specific programs that may appear on the screen, unless you’ve specifically been trained to do so (only EAN Homeless Prevention programs using Prevention VI-SPDATs at the moment)
- Add the client’s contact information to the Location tab


Tom Bombadil
PROFILE SERVICES HISTORY REFERRALS PROGRAMS ASSESSMENTS FILES NOTES LOCATION
PROGRAM ELIGIBILITY DETERMINATION
VI-SPDAT-V2 Score Summary
GENERAL 1
HISTORY OF HOUSING & HOMELESSNESS 0
RISKS 2
SOCIALIZATION & DAILY FUNCTION 1
WELLNESS 1
VI-SPDAT-V2 PRE-SCREEN TOTAL 5
Category -- All Categories --
Agency -- All Agencies --
Availability -- All --
SEARCH
Agency Programs
Do NOT refer to specific programs
RRH
Jenn Test Agency
PH - RAPID RE-HOUSING
Community Programs
TEST Emergency Shelter Program
Jason Test Agency
EMERGENCY SHELTER
INELIGIBLE PROGRAMS
REFER DIRECTLY TO COMMUNITY QUEUE
Refer client to the Community Queue if score is 4+
CANCEL

HMIS User Survey

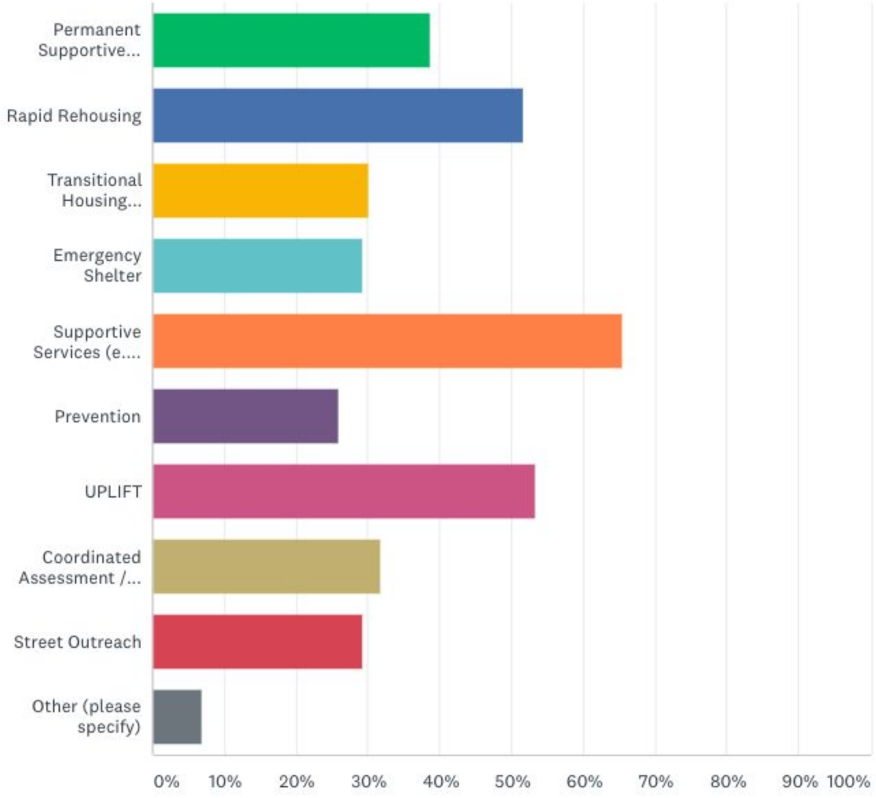
Thanks for your participation!

We received 116 responses to the survey (compared to 73 responses in 2016)

Q1

What type of services does your agency provide? (Check all that apply)

Answered: 116   Skipped: 0



Compared to previous survey, there was an increase in Rapid Rehousing compared to previous survey

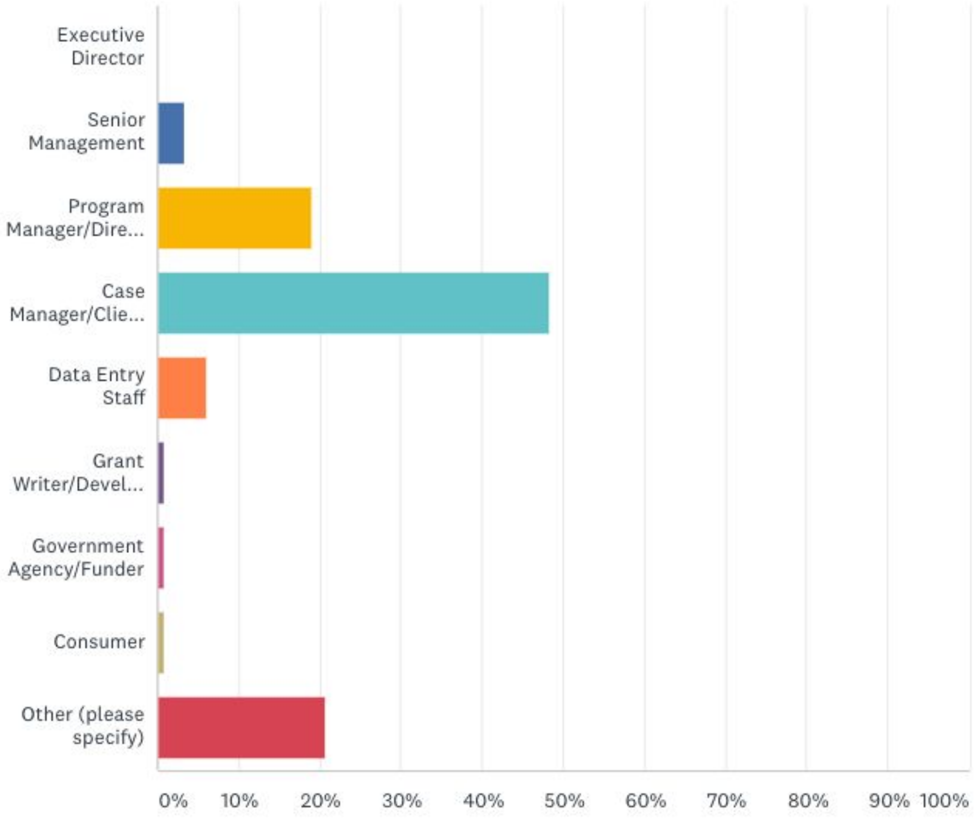
Slight decrease in Emergency Shelter

Added categories for UPLIFT and Coordinated Assessment

Q2

What is your primary role at your agency? (Select one)

Answered: 116 Skipped: 0



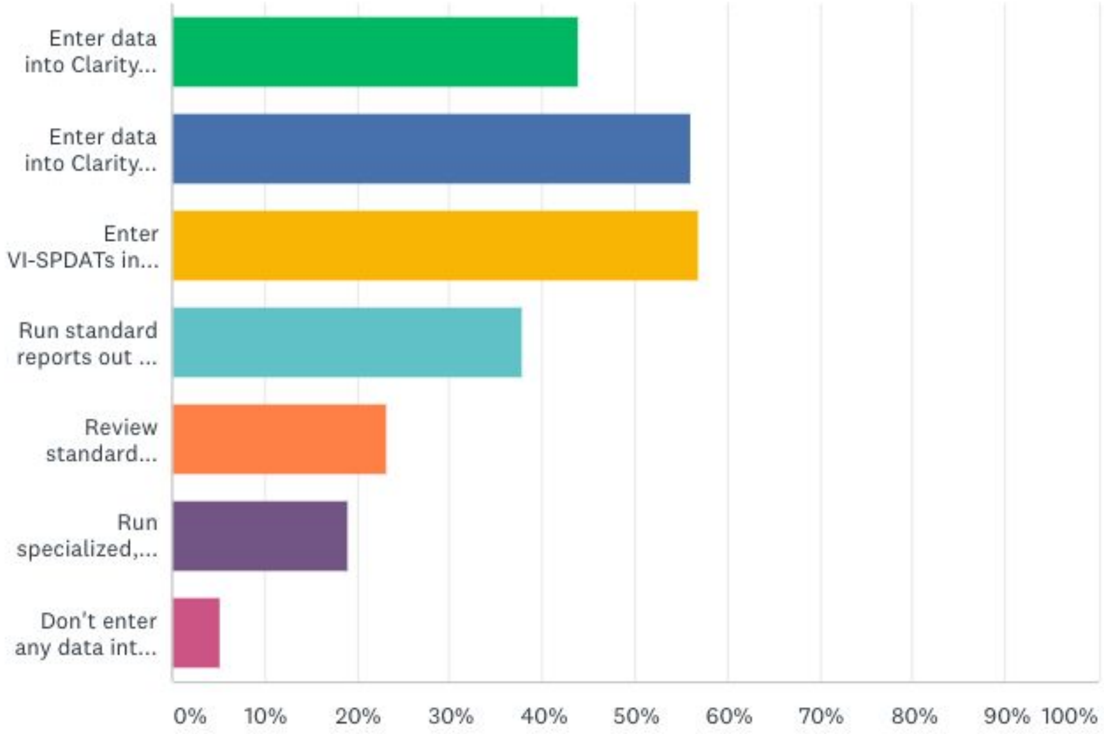
Majority of survey participants are Case Managers/Client Services

Other included Client Service roles (Outreach, Social Worker) as well as Data Analyst roles

Q3

Please indicate the ways you currently use Clarity? (Check all that apply)

Answered: 116   Skipped: 0



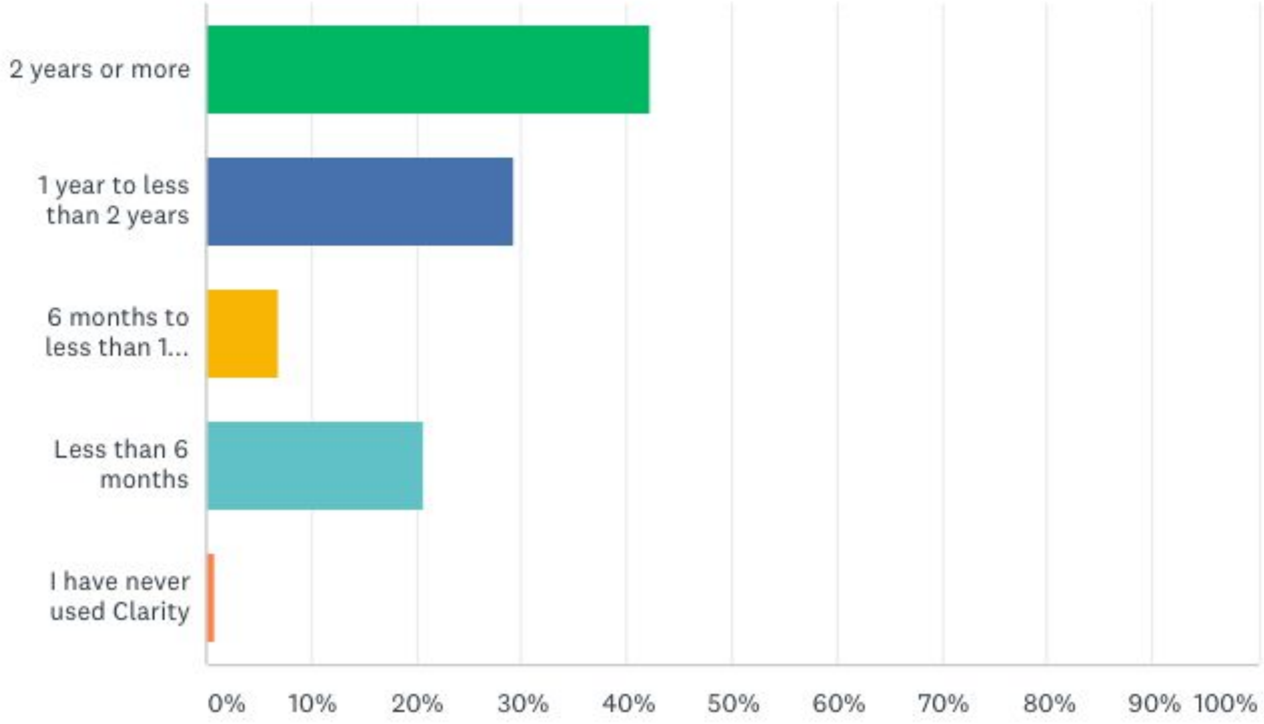
Increase in number of users who "Enter data into Clarity for one or more programs at my agency, regardless of how closely I work with the clients served"

"Enter VI-SPDATs into Clarity for Coordinated Assessment" is a new category this year

Q4

How long have you been using Clarity?

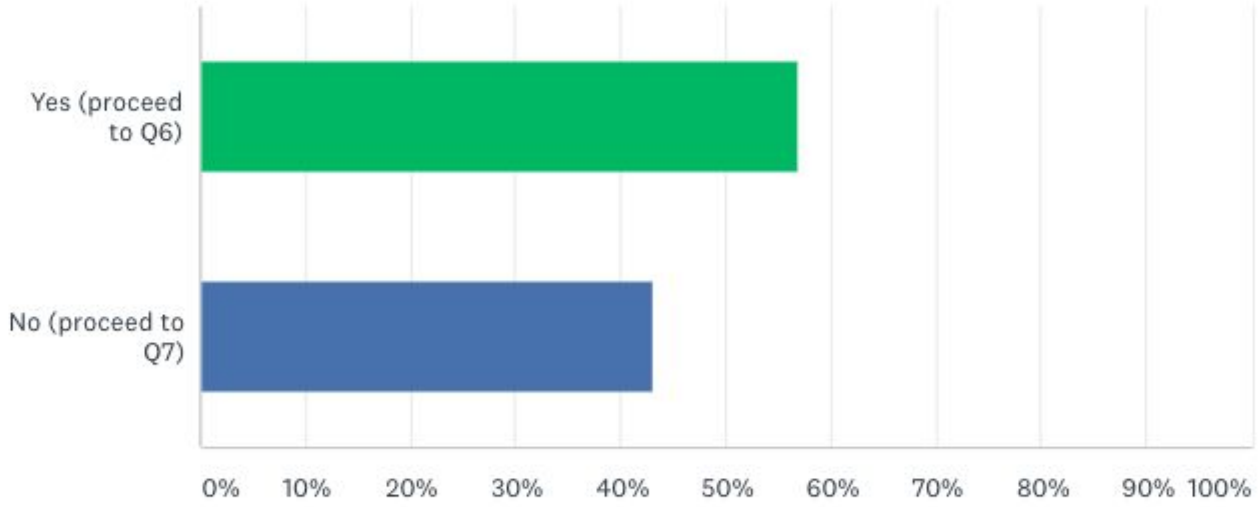
Answered: 116   Skipped: 0



Q5

Does your agency use any other client data management systems?

Answered: 116   Skipped: 0

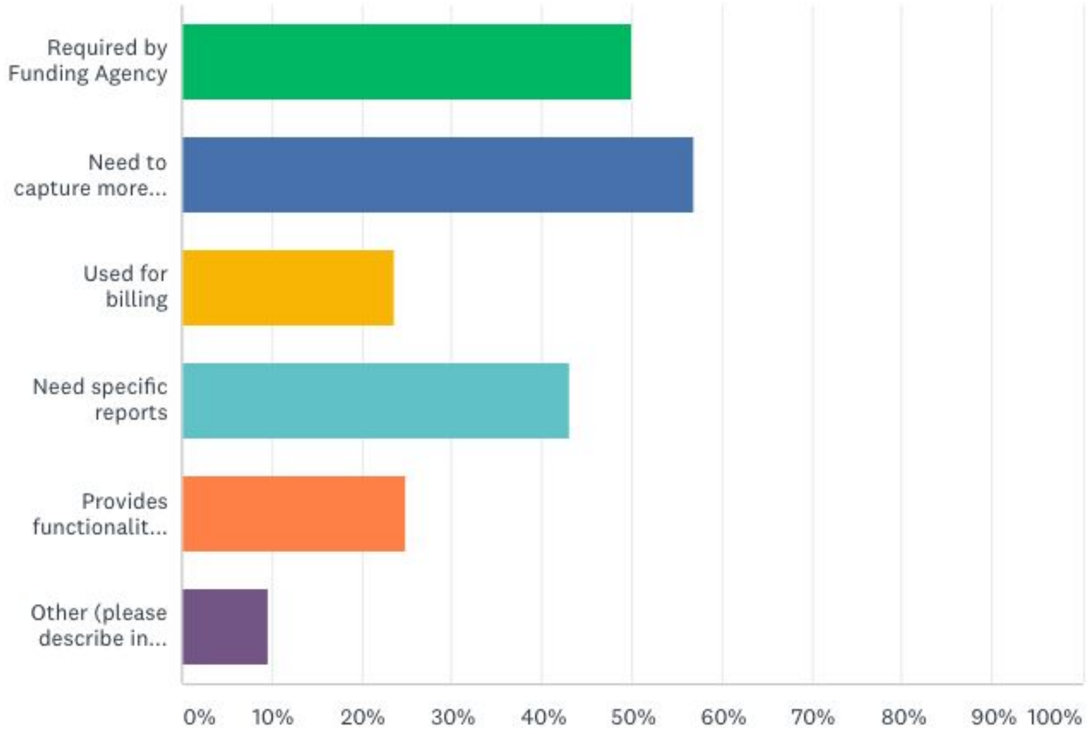


Similar to last survey, but “Yes” is slightly higher (56.90% vs 54.79%)

Q6

Why do you need to use other client management systems? (Check all that apply)

Answered: 72 Skipped: 44



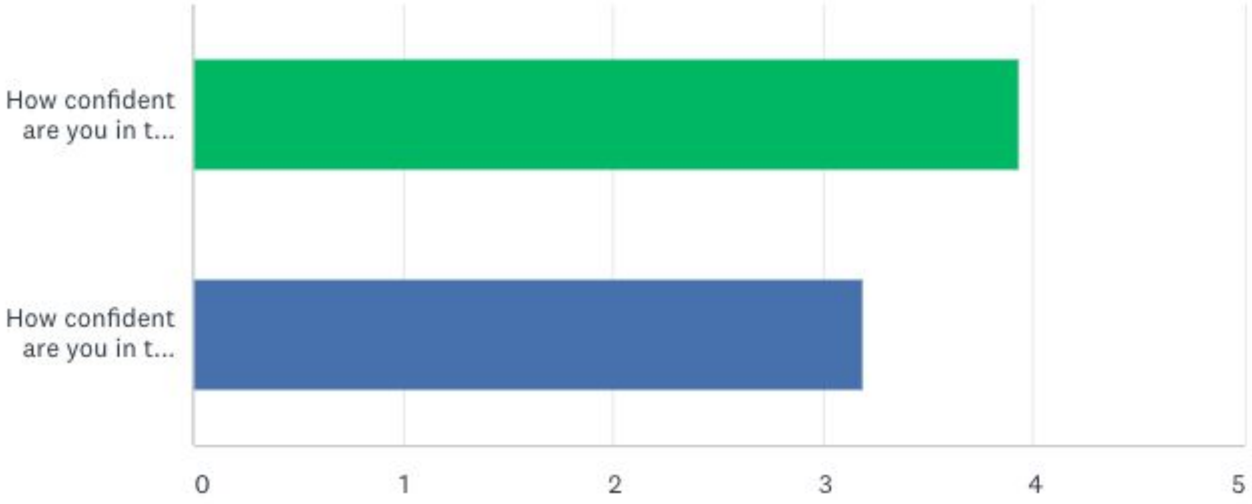
"Need to capture more data than available in Clarity" continues to be main reason

Decrease in the following uses: "Required by Funding Agency," "Used for Billing"

Q7

Data Quality

Answered: 106   Skipped: 10



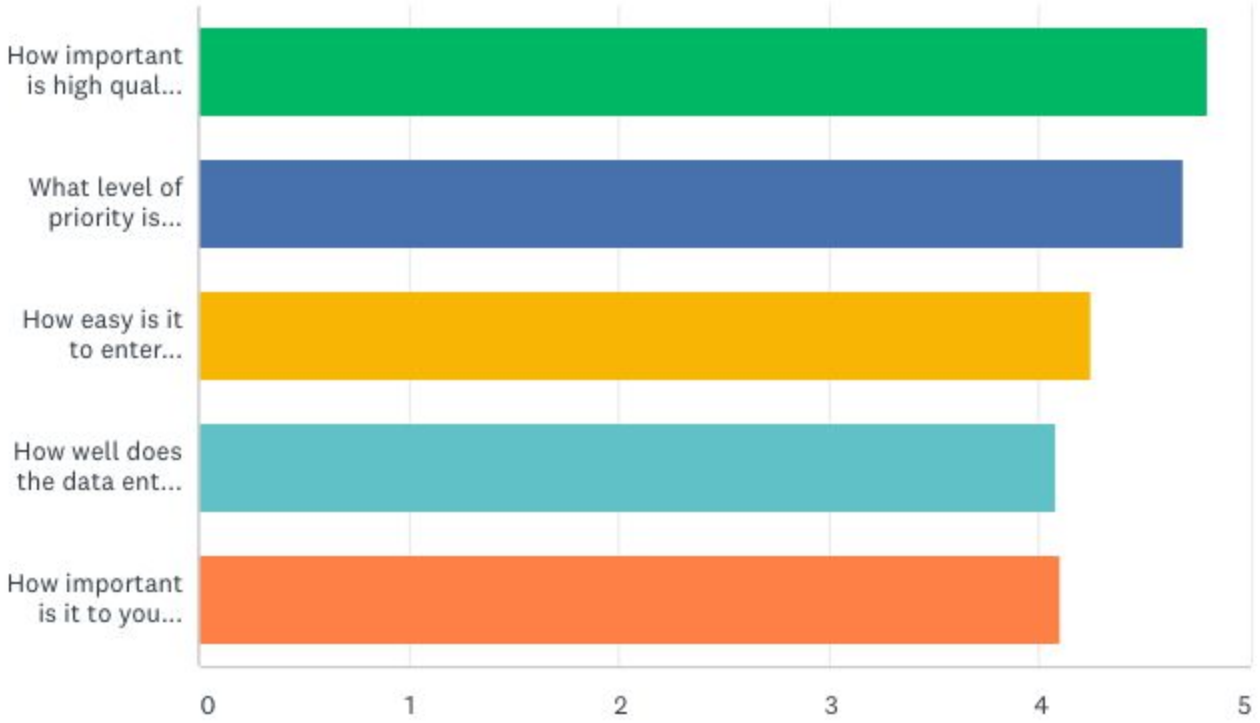
On average, users were more confident in their own agency's data compared to data entered by other agencies

Confidence in data from other agencies has slightly increased compared to previous survey (3.19 vs 3.06)

Q8

Data Entry

Answered: 106 Skipped: 10



Participants ranked importance of data quality highly (4.80) and as a high priority for their agency (4.69)

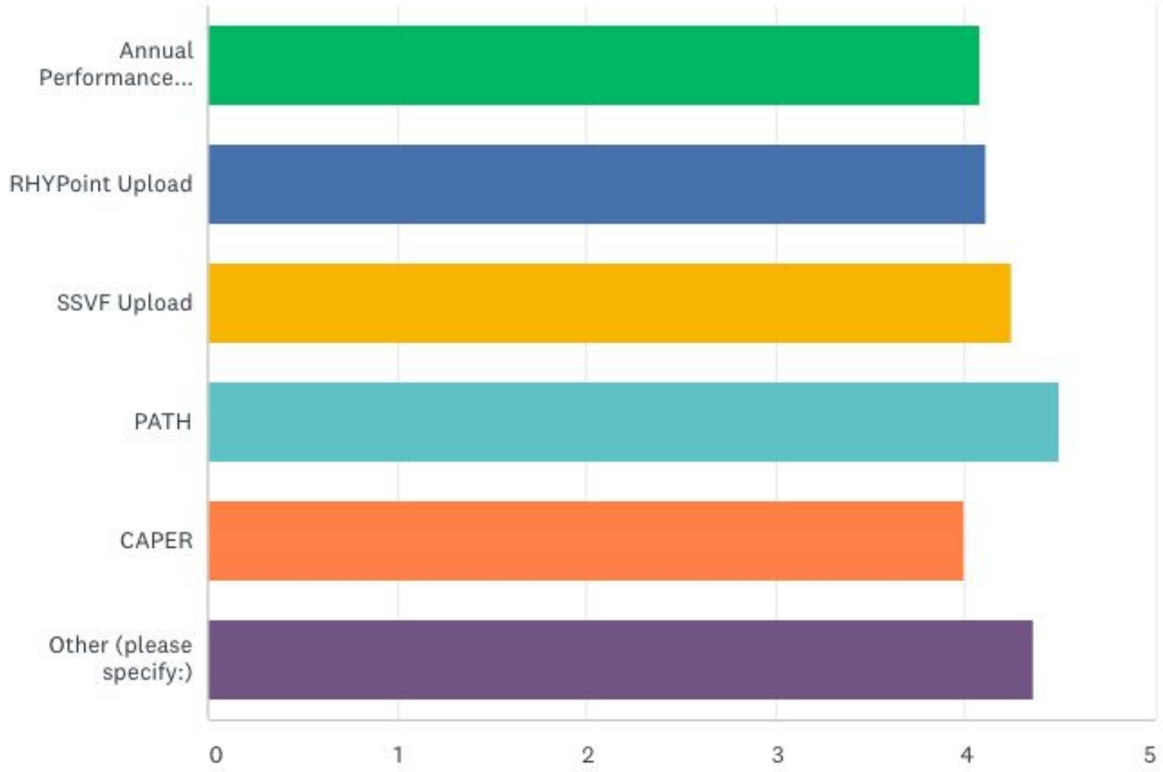
Improvement in "How well does the data entry match your intake form?"

Increase in importance of capturing non-HUD required information (4.10 vs 3.93)

Q9

How easy is it to prepare and submit the following reports?

Answered: 106   Skipped: 10



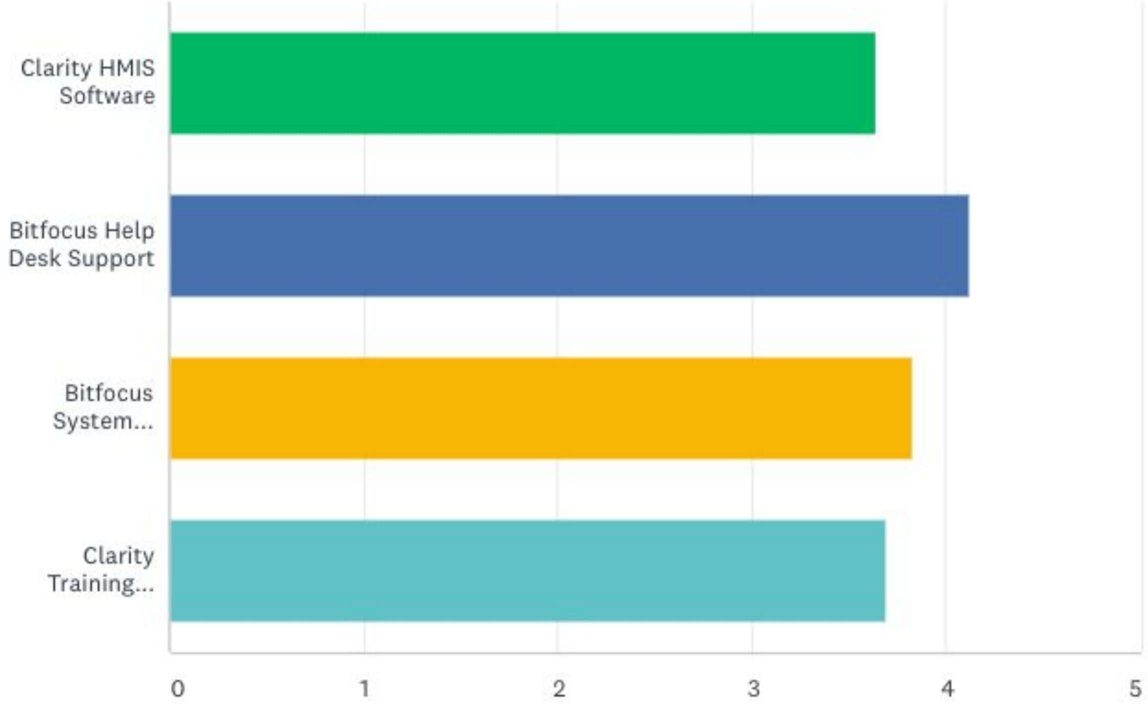
Other includes: Don't use reports, Client Services/Notes, Program reports, UPLIFT

Feedback that some users haven't used reports or can't find information they are looking for

Q10

What is your overall satisfaction with the Clarity Software and Bitfocus System Admin services?

Answered: 106   Skipped: 10



Increase in all categories

Biggest increases were in Help Desk (4.12 vs 3.83) and training (3.69 vs 3.41)

Takeaways

- Reporting: More training needed on what reports are available and how to find them, reporting on households is challenging
- Data entry: Reporting/tracking non-HUD-required items are important for some agencies, many users use multiple data systems so streamlined data entry is important
- Trainings: Make sure to follow up on questions, potential for improvement
- Adjust survey questions to include a place to add contact information if the user wants follow-up

Feedback

- What questions should we have asked in the survey? Is there anything you wish we’d asked?
- What trainings would be helpful for users at your agency?
- If you or any of your users would like specific follow-up on your survey comments or have additional comments, please let anyone at Bitfocus or OSH know

SCC Trainings and Resources

SCC Training and Resources

- General SCC HMIS site: http://scc.hmis.cc/
    - Required Trainings for User Accounts: http://scc.hmis.cc/training/schedule-a-training/
    - Looker Trainings for Agency Managers: http://scc.hmis.cc/training/schedule-a-training/
    - UPLIFT: http://scc.hmis.cc/training/uplift/
    - Coordinated Entry Toolkit: http://scc.hmis.cc/training/coordinated-entry-toolkit/
    - Client Forms: http://scc.hmis.cc/client-forms/
- Clarity Help Portal: https://get.clarityhs.help/hc/en-us
    - End User Help: https://get.clarityhs.help/hc/en-us/categories/115000086148-Getting-Started
    - Report Library: https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library
- Help Desk
    - Email: sccsupport@bitfocus.com
    - Phone: (408) 596-5866, Ext. 2

APR and Sage Uploads

APR and Sage Reminders

If you need to submit an APR in Sage:

- Before submitting the report, use the [HUDX-225] HMIS Data Quality Report to review data quality issues
- Run the [HUDX-227] Annual Performance Report [Oct 2017] in Excel format
- Go to the APR/ESG CAPER - CSV Extract tool (http://reporting.hmis.cc/) to convert to CSV format
    - Processing Report = “APR (Oct 2017)”
    - Process Method = choose Email or Download
    - Upload file and click “Process”

Detailed instructions (including details for the ESG CAPER) can be found on our Help Portal: https://get.clarityhs.help/hc/en-us/articles/115013115968-Sage-Upload-ESG-CAPER-and-APR

ROI Reminders

Remember to...

- Check to see if a client has a valid ROI before entering data
- If an ROI is already uploaded, review it to make sure you are aware of what is ok/not ok to enter
- When uploading an ROI, make sure the ROI form is fully completed, signed, and dated
- Upload an ROI for every client entered into HMIS (including children)
- If the client does not give consent, enter them as an anonymous client
- If a client’s ROI is about to expire, upload a new ROI
- Use the correct ROI form: http://scc.hmis.cc/client-forms/

Please do not...

- Alter the ROI form in any way
- Enter client data if the client did not give consent (example: profile photo, disability information)

Creating Anonymous Clients

- Social Security Number (SSN)
  - Entered as all 0's (zeros)
  - For Quality of SSN select: Client Doesn't Know
- Name
  - Unique identifier code is written as last name
  - Be sure to write the unique ID on the paper file so you can link the identity of the client to the anonymous record in Clarity
  - Note that the Clarity-generated identifier will not be created until the record is added to the system.
  - Ooooo (letter o not zero) is entered for first name
  - For Quality of Name select: "Partial, street name, or code name reported"
- Date of Birth (DOB)
  - Enter 01/01/xxxx.
  - For example, if a client was born on 7/3/1980 enter 1/1/1980 into Clarity
  - For Quality of DOB select: Approximate or partial DOB reported
- Location Tab
  - Leave blank

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

Housing Inventory Count (HIC)

The Housing Inventory Count (HIC) is conducted annually in late Jan. **This year, it was on Wed, Jan 24.**

Report is on shelter and housing programs (ES, TH, RRH, PSH), including non-participating HMIS programs (e.g. DV programs) and includes:

- Bed/unit capacity
- Federal funding source
- HMIS participation
- Location (geocode and address)
- Other project details
- Utilization rate based on clients in shelter/housing during one night in January (point-in-time count)

HIC: Client Data Requirements

- All Shelter and Housing projects will need to report the actual number of clients served on one night in January. Information will be used to calculate Utilization Rates for each project.
  - PSH, RRH, and OPH (Other Permanent Housing) Projects will be based on clients housed
  - RRH bed/unit inventory will be based on housed clients
- How you can prepare
  - Run the [GNRL-106] Program Roster and review the list of active clients
    - Exit clients who are no longer in the project
    - Enroll clients who are not yet in HMIS
  - RRH and PSH projects - Fill out the Housing Move-In Date for your housed clients
    - Housing Move-In Date should always be on or after the Project Start Date (if the client was housed at entry, use the Project Start Date)

Point In Time (PIT) Count Information

The Point In Time (PIT) Count is conducted annually in late January, on the same day as the HIC

The report includes sheltered clients (ES, TH, Safe Haven), including clients in non-participating HMIS programs (e.g. DV programs):

- Number of households and clients served the night of the PIT
- Number of children, adults aged 18-24, adults over 24
- Race, Ethnicity, Gender, Chronic Homelessness
- Substance Abuse, Mental Illness, DV, HIV/AIDS

Information is broken out by both household type as well as specific demographics (Veterans, Parenting Youth, Unaccompanied Youth)

Last Month's HIC/PIT Action Items:

- **Inventory information:** Please do a final review and confirm the information about housing and shelter programs that we previously reported to HUD in THIS SPREADSHEET.
    - Let us know if any new housing or shelter programs have come online during calendar year 2017
    - Similarly, let us know if any programs on our list have stopped operating during calendar 2017
- **Client data:** Make sure the household and client counts are accurate for the night of **Wed, Jan 24**
    - The number of households/clients in your programs in HMIS match the number of households/clients that were actually there on that date
    - **For ES/TH:** Review demographic information
    - **For RRH/PSH:** Fill out the Housing Move-In Date for your housed clients

Last month's PIT Count Preparation

For clients in your **Emergency Shelter, Transitional Housing, or Safe Haven programs** on the night of the PIT:

Make sure the household and client counts are accurate (i.e. if you run a Program Roster report for that day, it matches how many households/clients were actually there the night of the PIT)

For all clients served on **Wed, Jan 24,** review:

- Date of Birth
- Race
- Ethnicity
- Gender
- Veteran Status (for adults)
- Mental Health Problem
- Substance Abuse Problem
- Domestic Violence Victim/Survivor
- Living Situation section (for Chronic Homelessness)

This Month’s HIC/PIT Action Items:

- For all projects, review number of clients served in the “PIT Count” column of THIS SPREADSHEET for accuracy
  - Reminder: this year, the number of clients for PSH is based on Housing Move-In Date
- For RRH projects, review the bed/unit inventory. The number of beds/units in columns M through W should match the number of clients/households housed in your project the night of Wed, Jan 24
- Bitfocus will reach out to verify address information for all projects:
  - For site-based projects: full address is needed
  - For scattered-site projects: zip code where most units are located
- Bitfocus will reach out if there are any specific questions for your agency

Please complete your review by **Monday, March 12** and let Bitfocus know once it’s been completed

Continuous Data Quality Improvement (CDQI)

This Month: Continue Data Accuracy Review

- Continue regular review of entries/exits
  - Helpful report: [GNRL-106] Program Roster Report
- For agencies with ES, TH, RRH, PSH - continue review of HIC and PIT information
- For agencies not participating in HIC and PIT - check Data Accuracy
  - Helpful report: [GNRL-220] Program Details Report

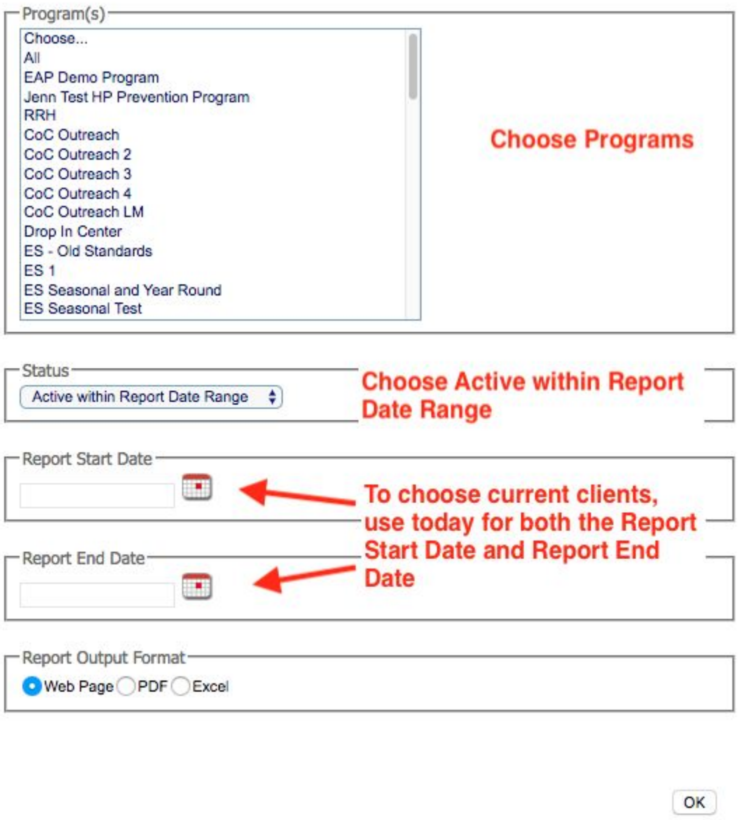
[GNRL-106] Program Roster Report

Where to find it:

- Reports Library, Programs folder

Important Notes:

- Gives basic information about clients and households participating in the program



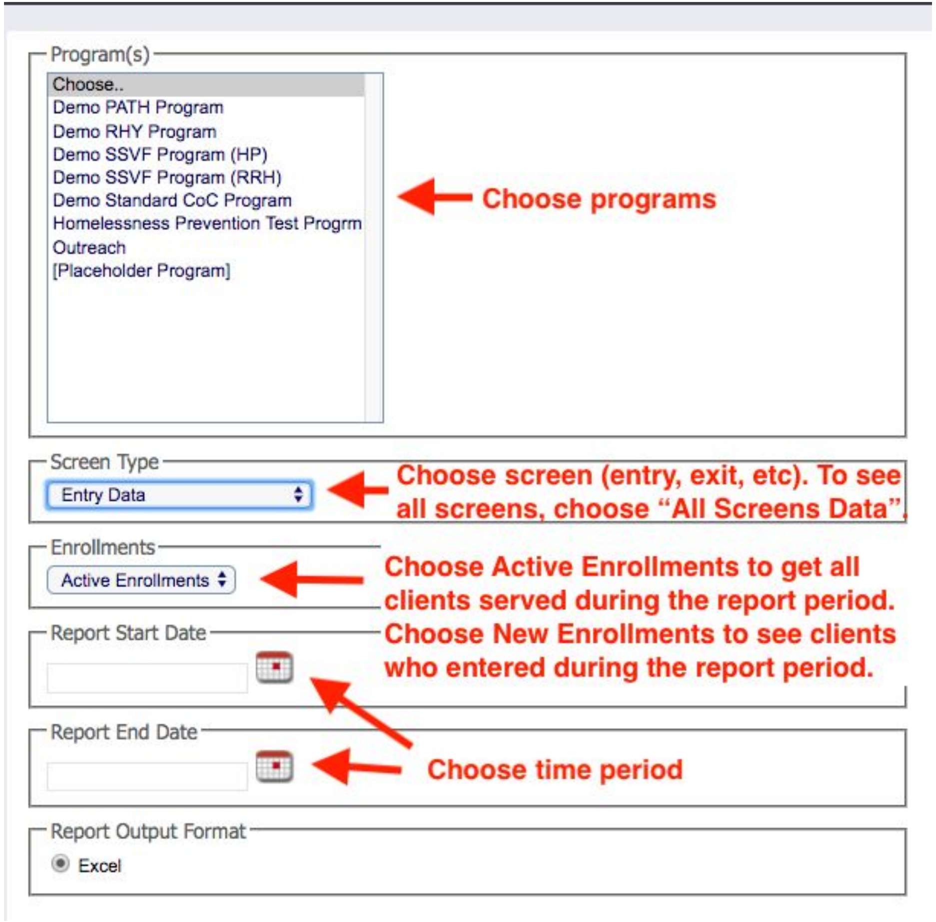
[GNRL-220] Program Details Report

Where to find it:

- Reports Library, Programs folder

Important Notes:

- Gives all information entered at entry, status assessment, annual assessment, and exit



Q&A