HMIS Agency Administrators Meeting

May 3, 2018

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

At our regular 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

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 Updates

HMIS Data Standards 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

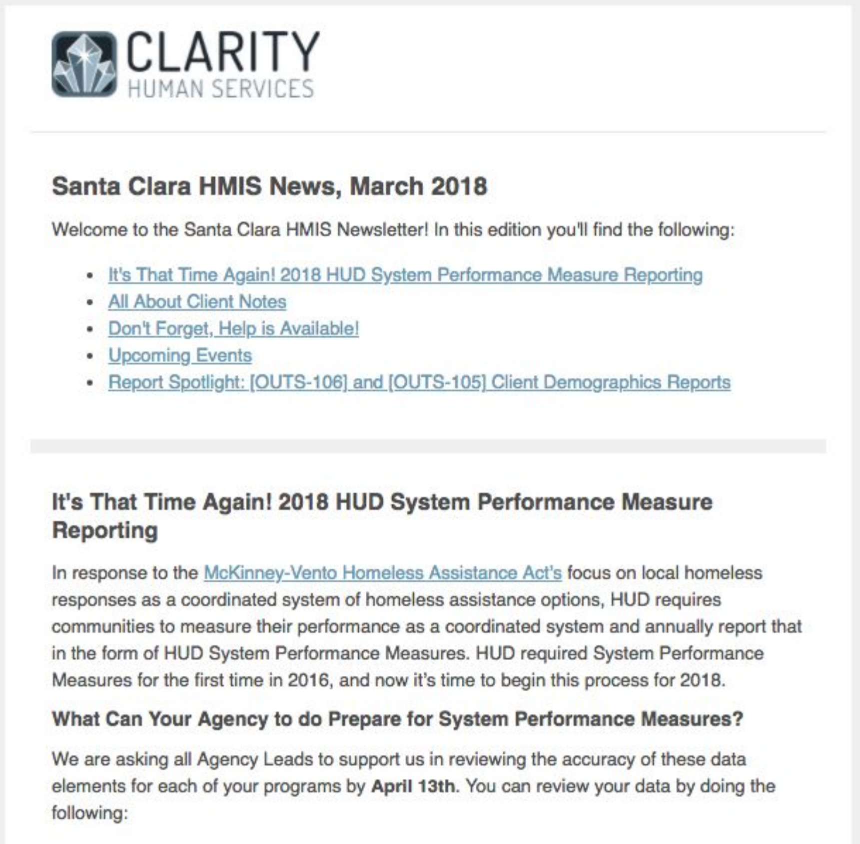
HMIS Newsletter

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



CLARITY
HUMAN SERVICES

Santa Clara HMIS News, March 2018

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

- It's That Time Again! 2018 HUD System Performance Measure Reporting
- All About Client Notes
- Don't Forget, Help is Available!
- Upcoming Events
- Report Spotlight: [OUTS-106] and [OUTS-105] Client Demographics Reports

It's That Time Again! 2018 HUD System Performance Measure Reporting

In response to the McKinney-Vento Homeless Assistance Act's focus on local homeless responses as a coordinated system of homeless assistance options, 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, and now it's time to begin this process for 2018.

What Can Your Agency to do Prepare for System Performance Measures?

We are asking all Agency Leads to support us in reviewing the accuracy of these data elements for each of your programs by **April 13th**. You can review your data by doing the following:

Training Updates

Training Videos Available

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

Data Analysis Training

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/

Register for Clarity Data Analysis Training

Data Analysis training is limited to users with a Clarity Human Services Agency Manager license. An overview of how the data is structured in Clarity Data Analysis and how to use the Clarity Data Analysis interface will be reviewed.

This is a pre-recorded webinar which covers basic skills. We recommend that users view this webinar as a first step to mastering Clarity Data Analysis.

Before viewing the webinar, please confirm with your system administrator or agency lead to determine whether you need access to Clarity Data Analysis.

PRE-RECORDED WEBINAR

Clarity Data Analysis Office Hours

Clarity Data Analysis office hours are informal, 60-minute sessions delivered in a live, Q&A format. Users who have begun using Clarity Data Analysis are encouraged to register for an Office Hours session and bring their questions!

Clarity Data Analysis Office Hours:	
Mon, Apr 30 | 1:00 PM CLICK HERE TO REGISTER	Tue, May 8 | 10:00 AM CLICK HERE TO REGISTER
Thu, May 17 | 10:00 AM CLICK HERE TO REGISTER	Wed, May 23 | 1:00 PM CLICK HERE TO REGISTER

Data Literacy Institute - Feedback Needed!

Data Literacy Institute

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, etc)

Auto-Exit for Outreach and Emergency Shelter

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

Duplicate Client 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.

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.

Merging Duplicate 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)

Next Steps

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

Agency Staff Deletion Rights - Feedback needed

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

System Performance Measures (SPM)

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

Data Quality

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)

	All ES, SH				All TH				All PSH, OPH				All RRH				All Street Outreach			
	2012-2013	2013-2014	2014-2015	2015-2016	2012-2013	2013-2014	2014-2015	2015-2016	2012-2013	2013-2014	2014-2015	2015-2016	2012-2013	2013-2014	2014-2015	2015-2016	2012-2013	2013-2014	2014-2015	2015-2016
1. Number of non-DV Beds on HIC	3643	3795	4007	4025	729	732	709	649	1200	2136	2133	2095	140	140	1237	1249				
2. Number of HMIS Beds	1245	3301	3508	3903	583	557	545	550	995	995	1003	982	140	140	958	920				
3. HMIS Participation Rate from HIC	34.18 %	86.98 %	87.55 %	96.97 %	79.97 %	76.09 %	76.87 %	84.75 %	82.92 %	46.58 %	47.02 %	46.87 %	100.00 %	100.00 %	77.45 %	73.66 %				
4. Unduplicated Persons Served (HMIS)																				
5. Total Leavers (HMIS)																				
6. Destination of Don't Know, Refused, or Missing (HMIS)																				
7. Destination Error Rate (Calculated)																				

Last Month’s Action Items

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

Last Month - SPM Data Completeness

Please review your agency's SPM data by doing the following:

1. Run the **[HUDX-225] HMIS Data Quality Report** for the period 10/1/16 to 9/30/17.
    a. In the HUD Reports folder
    b. Correct records with errors, paying special attention to any element that shows over a 5% error rate.
    c. For more details about the report, see the Help Center article: [HUDX-225] HMIS Data Quality Report: https://get.clarityhs.help/hc/en-us/articles/115012435727--HUDX-225-HMIS-Data-Quality-Report
    d. Why: As part of the SPM report, we are required to submit data quality information. Data quality also affects the accuracy of the 7 measures

Last Month - Review SPM Households

2. Run the **[GNRL-106] Program Roster** for the period 10/1/16 to 9/30/17
    a. In the Program Based Reports folder
    b. Review household groups (households are separated by bold lines. Clients not separated by lines are grouped together in a household).
    c. If you notice that clients are missing, check out our Help Center article: How do I add a new household member to the Program? https://get.clarityhs.help/hc/en-us/articles/115000443367-How-do-I-add-a-new-household-member-to-the-Program-
    d. If clients are grouped together incorrectly, contact the Helpdesk to get them corrected (sccsupport@bitfocus.com)
    e. Why: Some measures only count heads of household, so it's important that households be configured correctly.

Last Month - SPM Data Accuracy

3. Run the **[GNRL-220] Program Details Report** for the period 10/1/16 to 9/30/17 and review:
    a. **Date of Birth:** Some measures only count adults, so it's important that dates of birth be as accurate as possible.
    b. **Housing move-in date:** New this year for all PH projects! Make sure this date is filled in otherwise it will look like clients were never housed by your project!
    c. **Income and non-cash benefits:** Be sure these are/were updated before client exit. Increase in income/benefits is one of the areas in which communities are measured.
    d. **Living situation (including prior residence and length of time homeless):** Make sure these fields are as complete as possible with no "Client doesn’t know," "Client refused," or "Data not collected" values when possible. These elements impact measures around entries from homelessness.
    e. **Exit destination:** Avoid choosing "Client doesn’t know," "Client refused," or "Data not collected" values whenever possible. This element impacts measures around returns to homelessness.

This Month - Focus On

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

Households Review

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

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

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

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Housing Move-In Date

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

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

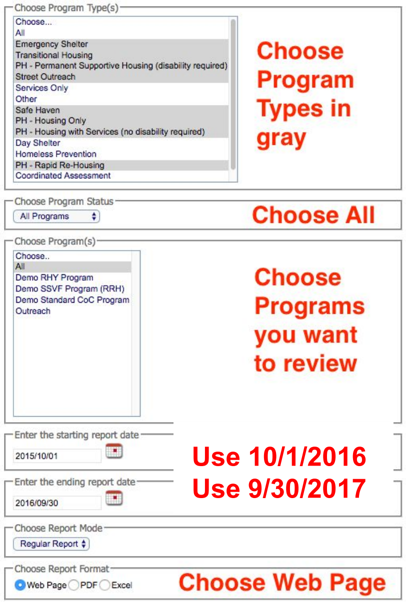
Jenn Test Agency
Active within [05/01/2017 - 05/02/2018]

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	-	-	02/01/2016	-	822		0	0	J. Ong

Destination and Income

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



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

Income at Entry/Exit: What to look for

Possible Issues:

1.“Income from Any Source” is:

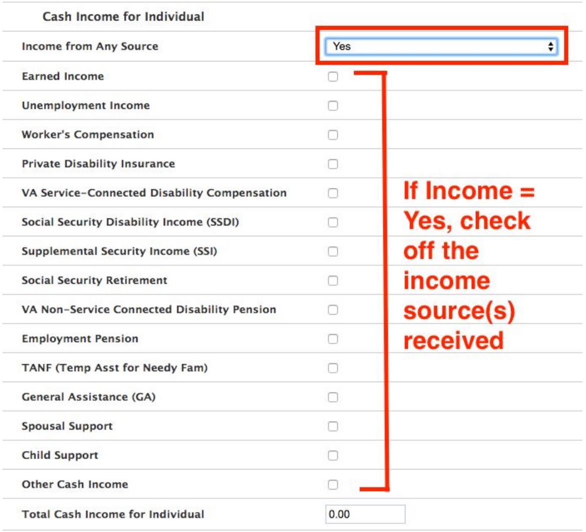
- Client doesn’t know
- Client refused
- Data not collected
- Missing

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)



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

Q&A