

# HMIS COMMUNITY MEETING

November 29<sup>th</sup>, 2018

# AGENDA

- HMIS Transition
  - HMIS Reorientation
  - Data Quality
  - Migration Details
  - Security Model
  - Timeline
  - Training
  - HMIS Bridge Period
  - Post-Launch
  - Licenses
- CES
  - Timeline
  - Trainings
  - Updates

# HMIS REORIENTATION

- Purpose of HMIS
  - To record provision of services and housing to homeless individuals
- Compliance First and Foremost
  - Only Migrating data for HUD HMIS Compliance
  - Orienting project setup to match grants
    - 1 project per grant with some exceptions (HHS:PATH, RRH/Prevention, etc.)
  - Not accepting non-homeless dedicated projects into the HMIS
- Federal Reporting
  - Improved data quality for federal reports
  - New 2019 Reporting has specific expectations of project setup (LSA, HIC/PITC)

# HMIS REORIENTATION – WHY WE MOVED

- Legacy System
  - Length of Stay
    - 10+ years on the same platform
  - Software
    - Capabilities and simplicity
  - Timing
    - No Data Standards Changes
  - Setup
    - Many legacy projects
    - Legacy structure of projects
  - Changing HMIS Environment

# DATA QUALITY

- ServicePoint
  - Last chance to clean data prior to final migration
  - [Support@rtfhsd.org](mailto:Support@rtfhsd.org) for questions
- Clarity Data Quality features
  - Can't edit others' entries
  - Can't create overlapping duplicate entries
- HMIS Data Monitoring
  - Posted Reports
  - Continued monitoring
- Refresher Training
  - Ongoing training
  - FAQs

# MIGRATION DETAILS - GENERAL

- Migrating open entries as of 10/1/2016 and forward
  - Long-standing entries (such as PSH) are migrating as long as they were still enrolled as of 10/1/2016
  - For example:
    - Client entered 9/1/2003, but still remains in project as of 10/2/2016 the client's data will migrate
    - Client who entered 9/1/2003 and exited 9/30/16 will not migrate

# MIGRATION DETAILS - GENERAL

- UDE: Universal Data Element
- PSDE: Program Specific Data Element
  - Migrating HUD Standard Data (UDE, PSDE)
    - PSDE includes all Federal program PSDEs – PATH, ESG, RHY, VA, SSVF and their federally required service and referral transactions

# HUD UDEs

## **Universal Identifier Elements (One and Only One per Client Record)**

- 3.1 [Name](#)
- 3.2 [Social Security Number](#)
- 3.3 [Date of Birth](#)
- 3.4 [Race](#)
- 3.5 [Ethnicity](#)
- 3.6 [Gender](#)
- 3.7 [Veteran Status](#)

## **Universal Project Stay Elements (One or More Value(s) Per Client or Household Project Stay)**

- 3.8 [Disabling Condition](#)
- 3.10 [Project Start Date](#)
- 3.11 [Project Exit Date](#)
- 3.12 [Destination](#)
- 3.15 [Relationship to Head of Household](#)
- 3.16 [Client Location](#)
- 3.20 [Housing Move-In Date](#)
- 3.917 [Living Situation](#)



# HUD COMMON PSDEs

- 4.2 [Income and Sources](#)
- 4.3 [Non-Cash Benefits](#)
- 4.4 [Health Insurance](#)
- 4.5-4.10 [Disability Elements](#)
- 4.5 [Physical Disability](#)
- 4.6 [Developmental Disability](#)
- 4.7 [Chronic Health Condition](#)
- 4.8 [HIV/AIDS](#)
- 4.9 [Mental Health Problem](#)
- 4.10 [Substance Abuse](#)
- 4.11 [Domestic Violence](#)
- 4.12 [Contact](#)
- 4.13 [Date of Engagement](#)
- 4.14 [Bed-Night Date](#)
- 4.18 [Housing Assessment Disposition](#)

# INDIVIDUAL PROGRAM ELEMENTS

## HUD-HOPWA Required Elements

- W1 [Services Provided – HOPWA](#)
- W2 [Financial Assistance– HOPWA](#)
- W3 [Medical Assistance](#)
- W4 [T-cell \(CD4\) and Viral Load](#)
- W5 [Housing Assessment at Exit](#)

## HHS-PATH Only Required Elements

- P1 [Services Provided – PATH Funded](#)
- P2 [Referrals Provided - PATH](#)
- P3 [PATH Status](#)
- P4 [Connection with SOAR](#)

## HHS-RHY Only Required Elements

- R1 [Referral Source](#)
- R2 [RHY-BCP Status](#)
- R3 [Sexual Orientation](#)
- R4 [Last Grade Completed](#)
- R5 [School Status](#)
- R6 [Employment Status](#)
- R7 [General Health Status](#)
- R8 [Dental Health Status](#)
- R9 [Mental Health Status](#)
- R10 [Pregnancy Status](#)
- R11 [Formerly a Ward of Child Welfare/Foster Care Agency](#)
- R12 [Formerly a Ward of Juvenile Justice System](#)
- R13 [Family Critical Issues](#)
- R14 [RHY Service Connections](#)
- R15 [Commercial Sexual Exploitation/Trafficking](#)
- R16 [Labor Exploitation/Trafficking](#)
- R17 [Project Completion Status](#)
- R18 [Counseling](#)
- R19 [Safe and Appropriate Exit](#)
- R20 [Aftercare Plans](#)

# INDIVIDUAL PROGRAM ELEMENTS

## CONTINUED

### VA Required Elements

- V1 [Veteran's Information](#)
- V2 [Services Provide - SSVF](#)
- V3 [Financial Assistance –SSVF](#)
- V4 [Percent of AMI \(SSVF Eligibility\)](#)
- V5 [Last Permanent Address](#)
- V6 [VAMC Station Number](#)
- V7 [SSVF HP Targeting Criteria](#)
- V8 [HUD -VASH Voucher Tracking](#)
- V9 [HUD/VASH Exit Information](#)

Some of the Veteran's Administration Programs also use these other federal partner elements:

- P3 [Connection with Soar](#)
- R4 [Last Grade Completed](#)
- R6 [Employment Status](#)
- R7 [General Health Status](#)

# MIGRATION DETAILS – CUSTOM DATA

- No additional data elements will be migrated by the go-live date
  - “Additional Data” includes anything not in UDE/PSDEs shown prior
    - “Additional Data” includes Case notes, VI-SPDAT, required elements for CES
- Only this listed “Additional Data” items above will be migrated
- The “Additional Data” migration will occur after launch

# SECURITY MODEL

- Client Privacy
  - Different from ServicePoint
  - Nuanced security options
    - Program privacy
- MPA/ROI
  - Built into Clarity
  - Multiple options for recording consent
    - File uploads
    - Electronic Signature
    - Etc.
- Policies & Procedures
  - Continued development of P&Ps

# OVERALL TIMELINE

- December 10<sup>th</sup> – Agency Manager training
- December 11<sup>th</sup>, 12<sup>th</sup>, 13<sup>th</sup> – User training
- December 22<sup>nd</sup> @ 11:59PM – ServicePoint stop date
- **January 4<sup>th</sup> – Go Live**
- January Date TBD – Manager Training II
- January Date TBD – FAQ Posting and/or FAQ Webinar
- January 4 – Mid February - Custom Data Migration Period

# MANAGER TRAININGS

- December 10<sup>th</sup>: Clarity Manager/Admin Training
  - 2 sessions
  - Intended for **staff who serve as agency's administrator for HMIS purposes**
    - Not relevant for any/all staff with job title related to management
  - Will cover all content included in user training PLUS details specific to the role of agency administrator in Clarity - managing your agency, programs and users
    - If you are attending manager training, you **DO NOT** need to attend user training
  - Must attend one of these to get a manager license and access to data analysis tool on day 1 of Clarity
  - Each Agency is defaulted to 1 Agency Manager
    - If you need more than one manager license and have not informed RTFH, email [support@rtfh.org](mailto:support@rtfh.org).

# USER TRAININGS

- December 11<sup>th</sup>, 12<sup>th</sup>, 13<sup>th</sup>
  - All enterprise (non-manager) users must attend one of these sessions to get access to Clarity on day 1
    - 3 sessions per day with a capacity of 60 per session
    - Only 1 session may be attended by each person
  - Second round of training sessions is being scheduled and will be announced when confirmed



# HMIS BRIDGE PERIOD

- Between December 23<sup>rd</sup> and January 4<sup>th</sup> there will be no data entry into ServicePoint
  - Providers will need to collect data in another secured method (paper, digital)
  - Paper forms for Clarity data collection will be made available
  - Be sure to follow HMIS Policy and Procedure data security guidelines for retention and subsequent disposal of data after launch

# HMIS BRIDGE PERIOD

- Access to ServicePoint is not guaranteed after December 31<sup>st</sup>
- Access to ServicePoint beyond January 4<sup>th</sup>, 2019:
  - Purchase ongoing access by emailing [support@rtfhsd.org](mailto:support@rtfhsd.org)
    - Please notify RTFH of ongoing access needs by the beginning of the HMIS bridge period (December 23<sup>rd</sup>)
  - All ServicePoint access will cease in March 2019

# POST-LAUNCH – CUSTOM MIGRATION

- Additional Data Migration
  - Feb 12<sup>th</sup>
  - Limited Scope
    - Case notes
    - VI-SPDAT scores
    - Limited items necessary for CES functionality

# POST-LAUNCH

- Manager training 2
  - Date and location pending
  - Focus on data quality and learning management capabilities
- Ongoing user training
  - In-person model
  - Frequent
  - Topic training after launch settles

# LICENSE CAPABILITIES

## Enterprise

- Basic access
- Data Entry
- “Canned” Compliance Reporting
  - APR, SSVF, RHY, PATH, etc.

## Manager

- Everything in Enterprise plus:
  - Agency Management
  - Looker Data Analysis Tool

# LICENSE COSTS

## Enterprise

- Setup - \$175 per license
  - Initial user setup for migration is covered
- Recurring – \$300 per user per year
  - **1<sup>st</sup> year only:** RTFH will only invoice ServicePoint Equivalent License Fee: **\$200 per user per year**
  - 2<sup>nd</sup> year: cost reduction incentives based on data quality thresholds

## Manager

- Setup - \$250 per license
  - Initial user setup for migration is covered
- Recurring – \$660 per user per year
  - **1<sup>st</sup> year only:** RTFH will only invoice ServicePoint Equivalent License and ART Viewer Fee: **\$350 per user per year**
  - 2<sup>nd</sup> year: cost reduction incentives based on data quality thresholds

# LICENSE BILLING

- As of January 1, 2019 Billing for Clarity license fees will commence using ServicePoint Equivalent Fees
  - Enterprise: \$200 for year 1
  - Manager: \$350 for year 1
- For those who request access, continued ServicePoint License fees will begin to accrue as of January 1, 2019
  - These are in addition to any Clarity license fees

# LICENSES

- One manager required per agency
  - Vendor requirement
  - Smoother agency and HMIS management
- Only those trained by RTFH will be able to access the HMIS on January 4<sup>th</sup> (go-live date)



# DV COMPARABLE DATABASE

- Separate Site – Comparable Database
  - Equivalent features to general HMIS
- Site has already been configured separately
- Communication Sent 11/28

# CES TRANSITION TO CLARITY

SERVICEPOINT



CLARITY

**CES is more than a workflow in HMIS. The CES transition is more than a migration to Clarity. It is also shifting from a system-focused process to a human-centric approach. The RTFH and the CES team are committed to uplifting the gaps of any software system to implement a fully functioning Coordinated Entry process by providing the human-focused approach that is integral in meeting the needs of our clients, partners, and our community.**

# CES TIMELINE: PRE-CLARITY LAUNCH

- 11/30/18: Emails to providers
  1. Email to projects to request forecast of needed matches
  2. Reminder to update all client records before 12/22
- 12/23/18 – 1/4/19: Bridge Period
  - No data entry into HMIS
  - During bridge period CES will use Active BNL to continue matching
    - Data updated prior to 12/22 will be used to inform the Active BNL
- Mid-December: Training on Transition
  - Training on the CES process and how it will function during the transition

# CES TIMELINE: POST-CLARITY LAUNCH

- **1/4/19: Clarity HMIS Go-Live Date**
- Jan-Feb '19:
  - Training on the New CES process
- **2/12/19: Go-Live Date for new CES Process**
- Beyond 1/12/19:
  - Continued Support
  - Additional Trainings

# CES FAQ

- Where can I get more info?
  - Be on the look out for e-mail updates & invitations to trainings and meetings
  - Go to the [RTFHSD website](#)
    - [CES Section](#)
    - [Calendar](#)
  - Read the RTFHSD newsletter
- I still have questions about CES:
  - Email the CES Team at: [CES@RTFHSD.org](mailto:CES@RTFHSD.org)

# HMIS REMINDERS

- HMIS Transition Details
  - [Timeline](#)
  - [Migration Details](#)
- User training
- Billing
- FAQ
- [Support@rtfhds.org](mailto:Support@rtfhds.org)

# COMMUNITY ENGAGEMENT - FAQ

- FAQ
  - We will take feedback and questions from trainings, discussions, tickets, etc.
    - Notecards
  - FAQ will be produced based on feedback
  - Submit Clarity feedback at trainings or by emailing us at [support@rtfhdsd.org](mailto:support@rtfhdsd.org)

# GENERAL HMIS TRANSITION INFORMATION

- More information is available
  - **Our Website**
    - [www.rtfhsd.org](http://www.rtfhsd.org)
  - **The HMIS Transition Update Feed**
    - <https://www.rtfhsd.org/hmis/hmis-transition/>
  - **Via Email**
    - [Support@rtfhsd.org](mailto:Support@rtfhsd.org)



# Q&A