



Agenda: HMIS Community Meeting

Thursday, Nov. 29th, 2018 | 1:00 pm – 2:00 pm

- 1. Welcome and introduction | Tamera Kohler, CEO, RTFH (3 min)**
- 2. HMIS Transition | Jegnaw Zeggeye, HMIS Administrator, RTFH (32 min)**
Tyler Uhlig, Data Analyst
Caty Schmitter, Data Analyst
- 3. Coordinated Entry System Updates | Elaine Rosas (10 min)**
- 4. Q & A | HMIS Tech Team (15 min)**



Minutes: HMIS Community Meeting

Thursday, Nov. 29th, 2018 | 1:00 pm – 2:00 pm

1. Welcome and introduction | Tamera Kohler, CEO, RTFH (3 min)

- a. Tamera Kohler welcomes attendees

2. HMIS Transition | HMIS Tech Team (32 min)

a. HMIS Reorientation

- i. The main purpose of an HMIS is for data collection and reporting for HUD HMIS compliance, so the HMIS environment requires some changes to accomplish this.
- ii. New software platform has additional capabilities and simplifies data entry for improved data quality.

b. Data Quality

- i. The final migration will bring over all data as entered in ServicePoint, last chance to improve the data quality prior to Clarity.
- ii. Data quality will be improved by Clarity's structure.

c. Migration Details

- i. Who: All clients who had open project entries as of 10/1/2016 will be migrated from ServicePoint to Clarity.
- ii. What:
 - Phase I (by 1/4/2019 Clarity go-live date)): UDE and federal partner PSDE data elements
 - Phase II (post-launch): Feb. 12th - Selective custom data elements migration, specifically related to CES

d. Security Model

- i. Client privacy differs from ServicePoint, which will be covered in the training.
- ii. MPA will be available in Clarity for client electronic signature and file uploads.
- iii. No file attachments will be migrated, which includes previously signed client MPA's.

e. Timeline

- i. December 10th: Agency Manager training
- ii. December 11th, 12th, 13th: User training



- iii. December 22nd @ 11:59PM: ServicePoint stop date (no additional data entered into ServicePoint will be migrated to the Clarity system)
 - iv. December 23rd @ 12 am - January 3rd: Migration Testing - HMIS Bridge Period (no data can be entered into either HMIS database)
 - v. January 4th, 2019: Go-live date for Clarity – users can access and start entering data into Clarity.
 - vi. January Date TBD: Manager Training II
 - vii. January Date TBD: FAQ Posting and/or FAQ Webinar
 - viii. January – mid-February: Additional user training sessions for those users who were not trained in first round of December training.
 - ix. January 4 – Mid February: Custom Data Migration Period (Phase II)
- f. HMIS Training
- i. No users will be issued a license to access Clarity without attending an RTFH training session.
 - ii. Users should attend the training most appropriate for roles (review full list of training sessions on [the Events Calendar](#)):
 - **User Training:** December 11th, 12th and 13th | 9 total sessions.
 - Vast majority of users should attend one of these sessions.
 - Will cover basic data entry workflow for standard user.
 - All users need to attend one 90-minute user training session to receive a Clarity Enterprise license (standard license which will allow users to enter data/access all necessary reports).
 - **Manager Training:** December 10th | 2 total sessions.
 - Manager session will cover all content included in user training, plus information on HMIS Agency Administrator role and how to use Clarity agency management features.
 - Users who are the HMIS agency administrator for their agency (or who are a backup agency administrator, another main HMIS point-of-contact between agency/RTFH, or who will be purchasing a Clarity manager license) should attend Manager Training sessions. Review roles/expectations for [key HMIS points-of-contact here](#).
 - Only register one person at a time for a training session! Multiple registrations for the same name will be deleted unless you inform RTFH via email at support@rtfhsd.org.
 - While many sessions are currently full, slots are opening up in various sessions as changes are made so check back on the list of sessions in the days leading up to training.



- Additional training sessions are being scheduled and the community will be informed as soon as they are finalized!
 - All users who only enter data for CES purposes (i.e., do not enter data into an HMIS project about services provided to clients other than for the purposes of utilizing the Coordinated Entry System) should wait to attend training until closer to when CES goes live in Clarity in mid-February. If you registered already and know you only use HMIS for CES purposes, please email support@rtfhdsd.org to cancel your registration.
- iii. After the initial Clarity trainings for transition between systems, more frequent, in-person trainings will be made available, including refresher trainings.
- g. HMIS Bridge Period
- i. No new data entry into ServicePoint HMIS after 12/22/2018 at 11:59pm
 - ii. No data entry into either HMIS system beginning 12:00 am on 12/23/2018 – 01/04/2019
 - iii. During this two-week Bridge period, client information will need to be collected via another secured method within the construct of the HMIS Policy and Procedures
 - iv. Clarity HMIS paper intake forms will be made available
- h. Post-Launch
- i. Once Clarity goes live, users will need to enter data collected during the Bridge Period, being sure to back date the data correctly.
 - v. Standard timely data entry is expected as close as possible to the launch date.
 - ii. Our contract with ServicePoint ends on March 31st, 2019, so all user access to ServicePoint will cease at that point.
- i. Licenses
- i. Enterprise License: Standard Clarity user license which most San Diego users will be given. Users will be able to enter data and access all required federal reports.
 - ii. Manager License: All capabilities of Enterprise license, plus ability to manage agency staff and programs and access to data analysis tool Looker.
 - iii. License Billing: Agencies will only be invoiced the equivalent ServicePoint fees as detailed in the meeting slides for the bridge between the two systems. This is only true for the first manager license for each agency, additional manager licenses will be invoiced at the BitFocus rate of \$660/annually.



- iv. If users need continued access to ServicePoint after January 1st, 2019, they will be invoiced for the additional months of access. No users will be able to maintain access past March 31st, 2019, when contract with ServicePoint vendor ends.
- v. There will be two installations of the Clarity HMIS – the general site and a separate site for users at agencies serving Domestic Violence victims. No data will be shared with any other licensed users outside of DV Clarity site

3. Coordinated Entry System updates | Elaine Rosas (10 min)

- a. CES has received and incorporated community feedback to improve this human-centric systematic approach to assisting clients.
- b. CES will use active By-Name List to continue matching
- c. Timeline
 - i. Emails that will be sent out in the next few days:
 - Email to housing providers requesting a forecast of how many matches/referrals of homeless clients they will need in the next 3-5 months
 - Reminder to HMIS users with CES access to update client information by 12/22 - Data updated prior to 12/22 will inform the By-Name-List (BNL)
 - 12/23/2018-1/4/19 – Bridge Period = No Data Entry into HMIS
 - d. CES Trainings
 - i. CES HMIS Transition Training: Mid December
 - CES Team will host a training presentation during the 3rd and 4th weeks of December regarding the CES process during the transition period.
 - ii. 1/4/2019 – Clarity HMIS Go Live date (initial launch will not include CES)
 - iii. 1/4/2019 – 2/20/2019
 - More in-depth CES training to review the Clarity CES workflow
 - 2/12/2019 – Go Live date for new CES Process in Clarity
 - Beyond 2/12/2019- Continued support and training.

4. Q & A | HMIS Tech Team (15 min)

Q: Will the unassigned/unused ServicePoint licenses transfer over to Clarity?



A: Providers will be contacted to confirm their list of users for Clarity prior to invoices being sent out for the upcoming year's licenses (which will take place in the next several months in addition to final invoices for additional ServicePoint licenses being sent/updated). While only users who have completed training will have access to a Clarity license on the go-live date of 1/4/2019, providers will be able to include users beyond that in their estimated license allotment for this billing cycle and all users that licenses are purchased for will be able to gain access once they have completed training.

Q: Will you be adding more Clarity trainings past the currently offered trainings?

A: We will add more training sessions as spaces with computer labs can accommodate.

- i. We will be updating the current lists of trainees signed up and that effort will lead to additional training sessions to open, and we will communicate with all users when more spots have opened.
- ii. If you are not available during any of the available scheduled times, or if you are not sure about your training status, please contact <mailto:support@rtfhsd.org>
- iii. If you may be able to offer a computer lab that we might access for additional training opportunities, please contact <mailto:support@rtfhsd.org>.

Q: Will Clarity need the PKI Certificate installed?

A: PKI is not a requirement in Clarity, so no certificate will need to be installed.

Q: What happens to the client data in ServicePoint that is not migrated to Clarity?

A: If information is needed past March 31st, 2019, contact us for that data to be made available in a different format.

Q: If we have a program like a Day Shelter where there are a lot of historical open entries that – based on the migration logic – will be brought over to Clarity, but that we know likely can be closed out, how can we best address this data quality issue?

A: There is a feature in Clarity to auto-exit the clients from open project entries that can be implemented after the information has been migrated.

Q: How will the auto-exiting of clients work?

A: Logic can be applied to auto exit a client from a program if they have been open in it for longer than a specified timeframe. More information will be provided for this in the FAQ and feel free to reach out to support@rtfhsd.org with any specific questions on programs you think should have auto exit logic applied.

Q: Will client file records, including client MPA's, be included in the data migration?



A: No client files currently uploaded in ServicePoint will be migrated over to Clarity. Any necessary existing client file attachments will need to be uploaded into Clarity once users have access to it. Providers should plan for how best to identify and maintain client files from ServicePoint as well as a process for uploading them once Clarity goes live.

Q: Will locked clients be migrated to Clarity?

A: Privacy settings for a client's project entry can be applied, but not for the individual client.

Q: Will duplicate clients need to be merged?

A: Data transformations in Clarity will identify duplicate clients from the ServicePoint data based on a number of potentially identifying data elements and merge them automatically during the migration process. We cannot guarantee all duplicates will be merged, but those that are identifiable based on the logic BitFocus uses for its transformations should be.

Q: Will clients in Clarity have the same client ID as in ServicePoint?

A: No, Clarity uses a different client unique identifier. However, the client ID's from ServicePoint will be migrated over in an Alias field. The Alias field will not be visible in the client record in Clarity, but will be searchable through the Client Search screen.

Please send any additional questions about the migration that have not yet been addressed to support@rtfhsd.org. We will be working on developing and posting answers to frequently asked questions as well as other support resources and will use the community's questions (as submitted through in-person meetings, emails to support@rtfhsd.org and other forms of communication) to inform which topics we focus on for developing resources.