

MID-WILLAMETTE VALLEY HOMELESS ALLIANCE

HMIS Users Workgroup

August 8, 2023 Minutes

Attendance

HMIS Users Workgroup		HMIS Users Workgroup	
Hunter Belgard, OHCS (Co-chair)	X	Alisa Tobin, MWVCAA/HOME	---
Jimmy Jones, MWVCAA (Co-chair)	---	Lawrenza Gann, MWVCAA/Veterans	X
Shawntel Black, Neighbors	X	Pamela Blanchard, NWHS	---
Tara Stephen, CHS	X	Stephanie Gilbert, Polk County FCO	---
Matt Herbert, CATP	X	Dominique Schoessler, Shangri-La	X
Tawny Zellner, Easterseals	X	Jill Tucker, St. Francis Housing	X
Doug Odell, Family Promise	---	Lynelle Wilcox, SafeSleep	X
Christine Sommer, MCHA	---	Megan Smith, Sheltering Silverton	X
Kaela Lombardi, MWVCAA/ARCHES	X	Brenda Newey, UGM, Simonka Place	---
Rachel McKee, MWVCAA/ARCHES	X	Stacy Griffin, VA (on leave until November)	na
Yeudiel Alvarez Flores, MWVCAA/De Muniz	---	Kimberly Nowlin, WATW, Grace House	---
		Guests Present	
Jan Calvin, MWVHA Consultant	X	Dana Tenoso, Youth ERA	X
Breezy Aguirre, MWVCAA/ARCHES	X		
Elliott Lapinel, MWVCAA/ARCHES	X		

Business Items

Minutes – Matt motioned, and Rachel seconded approval of the 7/11/23 minutes; approved unanimously.

Agenda – Hunter asked if the agenda could be revised to focus on ROI protocols. The group agreed by consensus.

Updates

CoC Updates – Jan noted that the board recently approved the change of the CoC's HMIS Lead to be the ORS 190 Entity. HUD will transfer the HMIS Support grant from OHCS to the ORS 190 Entity. The funds (\$14,696) will be used the same way they have been used, to support ORS 190 Entity costs for HMIS implementation. She shared a draft of the proposed charter changes that will go along with this shift (attached).

Hunter noted that this change doesn't impact people on a day-to-day basis, as OHCS will continue to provide the services they have been providing and address additional system improvements. It was suggested that more clarification of roles would be helpful.

HMIS Training Plan

Hunter presented a preliminary schedule for implementing the HMIS Training Plan (attached).

The question of how to sign up for training that required a sign-up came up. Suggestions offered included posting a link to a Sign-up Genius or a Cognito Form. The first

ROI Workflow

The purpose of putting the ROI in HMIS is so other participating agencies can see that it has been signed. It is a universal ROI that covers all HMIS participating agencies. However, WellSky designed it to only show that

someone signed an ROI for the agency where they signed it. 42 CFR regulations prevent sharing where the person signed the ROI.

So, the new methodology is *two* steps.

1. Enter the ROI and click on your agency in the provider list (same as always).
2. *Add ROI, click Search, click on "All Universal ROI" from the provider list*

This new ROI protocol works when the client hasn't denied sharing access. Next month, Hunter will provide training about what to do when a client doesn't want to share with anyone but the initial agency - or wants to restrict information from a particular agency. This is the "limited visibility" protocol.

NEXT MEETING

September 12, 2023

HMIS Users Workgroup, 2:30-3:30 p.m. .

<https://us02web.zoom.us/j/82448995403?pwd=UHJxeW9UZDYxcTBiV0U1Z1RVSGhRUT09>

Meeting ID: 824 4899 5403 Passcode: 057658 One tap mobile +16699006833,,82448995403#,,, *057658#

The following are three excerpts from the governance charter with revisions that relate to changing the HMIS Lead from OHCS to the ORS 190 Entity – 8.3.23.

MID-WILLAMETTE VALLEY HOMELESS ALLIANCE GOVERNANCE CHARTER

MWVHA Board Approved 3.9.23 (date TBA)

Excerpt 1:

iviii. **HMIS USERS WORKGROUP.** The HMIS Users Workgroup consists of the HMIS Agency Administrators from organizations using the Homeless Management Information System (HMIS). The workgroup is co-chaired by the HMIS ~~Lead organization~~ System Administrator or its designee, and the HMIS Designated Coordination Entity, as described in Article IV.B.2. The workgroup shall identify barriers to implementation of the CoC Data Quality Plan and ensure agencies and individual users have what they need to be timely, complete, and accurate in their use of HMIS, and review and make recommendations on HMIS policies and protocols to the HMIS Lead, HMIS System Administrator, HMIS Coordination Entity, and CoC Board.

Excerpt 2:

D. DESIGNATING AND OPERATING A HOMELESS MANAGEMENT INFORMATION SYSTEM

1. **HMIS PURPOSE.** The primary purpose of the CoC's Homeless Management Information System (HMIS) is to aggregate data on homelessness across Marion and Polk counties to accurately describe the region's scope and evaluate the effectiveness of efforts to reduce and end homelessness. The CoC uses HMIS to:
 - a. Understand the characteristics and service needs of homeless people;
 - b. Analyze how homeless people use services;
 - c. Evaluate program effectiveness and outcomes;
 - d. Improve access to and delivery of services for people experiencing homelessness; and
 - e. Strengthen community planning and resource allocation.
2. **DESIGNATED HMIS ROLES.** The ORS 190 Entity, Mid-Willamette Valley Homeless Alliance ("ORS 190 Entity") ~~Oregon Housing & Community Services (OHCS)~~ is designated as the HMIS Lead Agency/~~Administrator~~. Oregon Housing & Community Services (OHCS) is designated as the HMIS System Administrator. ~~WellSky~~ is the vendor that provides the licensed software for the HMIS system. Mid-Willamette Valley Community Action Agency is designated as the CoC region's HMIS Coordination Entity, designated by the HMIS Lead to coordinate data collection and data analysis for the region. The CoC Board oversees the work of the HMIS partners.
3. **HMIS DECISIONMAKING AUTHORITY.** HMIS decisions which affect local CoC operations are made by the HMIS Lead Administrator, in consultation with the HMIS System Administrator, HMIS Users Workgroup and HMIS Coordination Entity. HMIS decisions which affect CoCs participating in statewide HMIS implementation will be made by the Oregon Multi-CoC Homeless Management Information System (HMIS) Governance Committee, with representation from each of the four member CoCs. The CoC Board will designate representatives to serve on the Governance Committee. CoC staff will provide a summary of key decisions to the CoC Board at least annually.

4. **HMIS LEAD RESPONSIBILITIES.** The ORS 190 Entity Oregon Housing & Community Services, as HMIS Lead, working closely with the CoC and in collaboration with the HMIS System Administrator, is responsible for maintaining the CoC's HMIS system in compliance with HUD standards. The ORS 190 Entity OHCS is responsible for coordinating the following activities:
- Providing operation, security, maintenance, system auditing, and technical support of HMIS central hardware, software, and connectivity;
 - Executing a written HMIS Participation Agreement with each HMIS Participating Agency, which includes the role, obligations, and authority of the HMIS Lead and the agency and requirements to comply with security, privacy, and data quality plans;
 - Setting up and managing user accounts, access levels, and passwords;
 - Providing technical and user support for HMIS software, including agency account set-up, system monitoring and testing, problem diagnosis and resolution, and routine software and information maintenance;
 - Working with Mid-Willamette Valley Community Action Agency, as the CoC region's HMIS Coordination Entity, to provide and coordinate ongoing training and technical support for the system;
 - Ensuring consistent HMIS participation by CoC and Emergency Shelter Grant (ESG) recipients and subrecipients;
 - Maintaining and updating a Privacy Plan, Security Plan, and Data Quality Plan;
 - Working with Mid-Willamette Valley Community Action Agency, as the CoC region's HMIS Coordination Entity, to ensure the accuracy of data, including regularly assessing that all participating agencies are accurately and comprehensively capturing participant entry and exit dates and providing technical assistance to correct data quality challenges;
 - Coordinating regular end user meetings; i.e., HMIS Users Workgroup and Agency HMIS Administrators meetings, to discuss software updates, data entry, report writing, and system management issues;
 - Serving as point of contact for end user questions and concerns;
 - Assessing compliance with the CoC's HMIS Policies and Procedures Manual;
 - Maintaining contact with the software product developer to ensure consistent and uniform communication among product support personnel and the community;
 - Generating information on the community's homeless and housing situation for community planning, advocacy, and funder reporting requirements;
 - Assisting end users in the creation of custom reports and queries;
 - Providing regular aggregate data reports to participating agencies, CoC staff, and the CoC Board;
 - Reviewing and implementing product upgrades;
 - Completing the Annual Longitudinal System Analysis Report;
 - Conducting regular data quality checks and providing reports to the CoC Board; and
 - Serving as the applicant to HUD for grant funds to be used for HMIS activities for the CoC's geographic area, as approved by the CoC Board.
5. **PROVIDER PARTICIPATION.** Any organization within the CoC geographic region that receives Continuum of Care Program ~~and/or~~ Emergency Solutions Grant (ESG) funds must participate in HMIS as an HMIS Participating Agency, or a comparable database if the organization is a domestic violence service provider. In addition, the CoC encourages all providers of services to homeless individuals and families within the CoC geographic area (other than DV service providers), regardless of whether they receive CoC or ESG funds, to become an HMIS Participating Agency and include their data in HMIS.
6. **HMIS MANUAL.** To ensure compliance with HUD requirements, the HMIS Lead, in collaboration with the HMIS System Administrator, HMIS Coordination Entity, HMIS Users Workgroup and other stakeholders, is responsible for coordinating the development, annual review, and updates of ~~developing and annually~~

~~reviewing and updating~~ the CoC's HMIS Policies & Procedures Manual. The manual provides the framework for the ongoing operations of the HMIS system. It includes the CoC's privacy, data quality, and security plans for the HMIS system. At any time, the HMIS Lead, [HMIS System Administrator](#), HMIS Coordination Entity, HMIS Users Workgroup, or CoC Collaborative Committee may identify elements of policies or procedures or other HMIS-related plans that need to be revised. Recommendations for revisions are to be submitted to the HMIS Users Workgroup. The HMIS Lead will present the HMIS Policies & Procedures Manual to the CoC Board annually, or more frequently if significant substantive changes are proposed.

Excerpt 3:

ARTICLE VI. CoC POLICIES AFFECTING PROGRAMS

2. STREET OUTREACH POLICY.

Purpose of the Street Outreach Policy

The Mid-Willamette Valley Homeless Alliance (the Continuum of Care or "CoC") seeks to facilitate and support robust, well-coordinated Street Outreach efforts that engage unsheltered individuals and families throughout the region. The purpose of this policy is to provide common language and clarity about the focus, scope, and practices related to Street Outreach activities within the region served by the CoC.

Focus of Street Outreach

Street Outreach aims to 1) meet immediate and critical health and safety needs of unsheltered individuals and families, and 2) engage unsheltered individuals and families and assist them to access shelter, housing, and other critical resources.

Definitions/Terms

Unsheltered

Individuals and families with a primary nighttime residence that is a public or private place not meant for human habitation, including but not limited to a vehicle, park, abandoned building, or sidewalk.

Street Outreach Worker

An individual affiliated with an agency or organization that seeks to meet the immediate and critical health and safety needs of unsheltered individuals and families, and/or engage unsheltered individuals and families and assist them to access shelter, [housing](#) and other critical resources.

Street Outreach Manager

A supervisor of Street Outreach Workers, responsible for designing, directing, and evaluating an outreach program that seeks to meet the immediate and critical health and safety needs of unsheltered individuals and families, and/or engage unsheltered individuals and families and assist them to access shelter, housing, and other critical resources.

Coordinated Entry System

The Coordinated Entry System standardizes the way individuals and families at risk of homelessness or experiencing homelessness access, and are assessed for and referred to the housing and services that they need for housing stability. The components of the Coordinated Entry System include 1) access, 2) assessment, 3) prioritization, and 4) referral. HUD requires CoCs to have a centralized or coordinated entry system. The Mid-Willamette Valley Homeless Alliance (the CoC) has designated Mid-Willamette Valley Community Action Agency as the manager of the CoC's Coordinated Entry System.

Homeless Management Information System (HMIS)

The Homeless Management Information System (HMIS) is used to collect unduplicated counts of individuals and families experiencing homelessness, track services provided, and support community needs analyses and identification of funding priorities. HUD requires CoCs to have a Homeless Management Information System and an HMIS Lead Agency. The ORS 190 Entity, Mid-Willamette Valley Homeless Alliance Oregon Housing and Community Services (ORS 190 Entity OHCS) is the HMIS Lead Agency for the Mid-Willamette Valley Homeless Alliance (the CoC). The ORS 190 Entity OHCS has designated Mid-Willamette Valley Community Action Agency as the CoC's HMIS Coordination Entity.

Scope of Street Outreach

Collectively, Street Outreach efforts will contact and engage unsheltered individuals and families throughout the Marion and Polk county region, including cities, towns, and unincorporated areas. Geographic coverage will be assessed annually, and plans for continuous improvements updated.

Street Outreach Practices

The following practices will guide the Street Outreach activities within the region served by the Mid-Willamette Valley Homeless Alliance (the CoC).

Communications

Street Outreach Workers will

- 1) Participate in regularly scheduled Coordinated Outreach networking meetings; and
- 2) Use the *Basecamp* application for real-time communication about needs, available resources, and sharing other relevant information.

Coordinated Scheduling

Street Outreach Workers will coordinate schedules and otherwise align efforts to assure an equitable distribution of resources and efforts to connect with and engage individual families throughout the region. Individual agencies will share their team's schedule with other agencies, and collaborative "all call" outreach times will be scheduled. For example, this was the collaborative outreach schedule in April 2021:

Mondays: AWARE Food Bank - Woodburn; 10am-12pm (Shower Truck 10am-2:00pm)

Tuesdays: Cascades Gateway Park; 10am-12pm

Wednesdays: Market Street Camp; 10am-12pm

Thursdays: Wallace Marine Park; 10am-12pm

Check Basecamp for the current schedule.

Shared Supplies

Outreach Teams will cooperate and share supplies to help meet the needs of unhoused individuals and families throughout the region. Agencies with the capacity to store supplies will serve as collection sites for community donations, with the philosophy that the supplies are for the equitable benefit of all unhoused neighbors, and not just the people that the one agency reaches.

Training

Street Outreach Managers will jointly develop and assure delivery of "basic training" for Street Outreach Workers throughout the region, as well as supplemental training to address site-specific and/or population-specific issues.

Street Outreach Role with Coordinated Entry

Street Outreach Workers will 1) connect unhoused neighbors with the CoC's Coordinated Entry Assessment Team and 2) facilitate updates to client data to assure accurate information is used to address the client's current needs. Street Outreach Workers will participate in the CoC's Coordinated Entry general training, as well as their specific role related to Coordinated Entry.

Documenting Street Outreach Contacts in HMIS

The CoC's goal is to have all Street Outreach contacts documented in the Homeless Management Information System (HMIS). Agencies will develop capacity to participate in HMIS, and the CoC will provide training, licenses, and technical assistance for effective data collection. Programs with CoC and ESG funding are required to participate in HMIS.

Collaborative Planning

Street Outreach Managers will participate in monthly planning meetings to develop training, give and receive updates, address emerging needs, and identify ways to improve and extend Street Outreach throughout the region.

Adopted June 10, 2021

MID-WILLAMETTE VALLEY HOMELESS ALLIANCE

HMIS Training Plan Schedule as of August 8, 2023

1. New User Training

- a. Can happen anytime. Located on the MWVHA web-site. User walks through an instruction/activity form to complete the following.
- b. Read these documents.
 - i. Data Quality Plan
 - ii. HUD 2024 HMIS Data Standards
 - iii. HUD Technical Standards
 - iv. Local ROI
 - v. CoC policies
- c. Watch this video (a standard data entry flow).
- d. Take this test. Log into the Training site. Create a client, enter them into a program. Send the Client ID
- e. When completed, user will get a username and login

**2nd and 3rd Mondays of each month (same training; two opportunities per month!)
(Until it can be an online version.)**

11:00 a.m.-12:45 p.m.

****Link is IN HMIS! Plus, on MWVHA website. No need to sign up, use the link, attend.
This training includes a HMIS Packet and homework in the Training Site for completion.**

August:

Monday, 8/14 at 11:00

Monday, 8/21 at 11:00

September:

Monday, 9/11 at 11:00

Monday, 9/18 at 11:00

If one doesn't want to wait, they can reach out to MWVCAA (until it can be an online version).

SUGGESTION: Agency Admins support the new user to help them become "experts!"

2. Refreshers/Office Hours

- a. Held on the same day of the month, each month.
- b. You must sign up. If no one signs up, it is canceled.
- c. Open forum, with posted themes. (This month is Street Outreach, next month RRH, then CE exits, canned reports, etc.)
- d. Themes scheduled 4-6 months in advance, with at least half the time being open.

2nd Wednesday of each month, 8:30-10:00 a.m.

September 13 at 8:30 a.m.

****Link and sign-up will be IN HMIS! Plus, on MWVHA website.**

Sign up in advance. If no one signs up, it is not held.

THEMES – however, always open floor for questions:

- August – Built for Zero (BfZ). How does your HMIS data entry and program intersect with BfZ.
- September – SAP Business Objects Needs. Do you have unique needs, counts, data elements for your program?
- October – Data Quality. How to view? Data quality of what? How is it looking in a HUD view?

3. SAPBO Reports Training

- a. Optional; offered monthly by OHCS (more information to come)
- b. Open to all in the Quad Squad
- c. You must sign up. If no one signs up, it is canceled.

4. Visibility Training for Agency Administrators

- a. Optional; offered quarterly. (Could be done with a video posted to the website.)
- b. Open to all in the Quad Squad
- c. You must sign up. If no one signs up, it is canceled.

5. HMIS Training Requirement

- a. All users (new and ongoing users) are required to attend at least one training session per year.
- b. Specific training sessions may be required, when new features, policies, or protocols are implemented.