HMIS & Data Committee (HDC) Agenda
Thursday, April 8, 2021 ‖ 10:00 AM – 11:30 AM

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[Zoom Meeting] **Meeting ID:** 885 3572 5390 **Passcode**: 671646

One tap mobile: +16699009128,,88535725390#,,,,*671646# US (San Jose)
Dial by your location: +1 669 900 9128 US (San Jose)
Find your local number here

Agenda Item	Presenter(s):	Time	Item Type
I. Welcome & Introductions	Erica Plumb & Jameson Parker, (Co-Chairs)	10:00 AM (10 minutes)	Informational
II. Approval of 1/14/21 Meeting Minutes	Erica Plumb & Jameson Parker	10:10 AM (5 minutes)	Action
III. HMIS & Data Committee Briefing	Michele Watts, SSF Chief Planning Officer & Tina Wilton, SSF HMIS Manager	10:15 AM (15 minutes)	Informational
IV. HMIS Security Audit Update	Tina Wilton	10:30 AM (10 minutes)	Informational
V. March 10th CoC Board Meeting HDC Overview Feedback	Michele Watts	10:40 AM (10 minutes)	Informational & Discussion
VI. Fee Structure	Michele Watts	10:50 AM (5 minutes)	Informational

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VII. HMIS Certification Training/Quiz: **A. Introduction of "Soft Launch"** **B. Timeline** **C. Quiz Process**	Tina Wilton	10:55 AM (15 minutes)	Informational & Discussion
VIII. Announcements: ● **SSF Website Development - HMIS & Help Resources Webpages**			
IX. Meeting Adjourned **Next Quarterly HMIS Data Committee Meeting: Thursday, July 8, 2021**			

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HMIS & Data Committee Minutes
Thursday, January 14, 2021 ‖ 10:00 AM – 11:30 AM

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Recording of Zoom Meeting - Chat provided in recording.

Attendance:

Member	Area of Representation / Organization	Present
Anna Bilik	DHA	Yes
Christina Southern	Saint John's	Yes
Cindy Xiong	El Hogar	Yes
Coley Genger	River Oak Center for Children	Yes
Cynthia Hunt	Cottage Housing, Inc.	Yes
Erica Plumb	Mercy Housing	Yes
Ibra Henley	SHRA	Yes
James Landreth	SHRA	Yes
Jameson Parker	Midtown Business Association	Yes
Jill Fox	Volunteers of America (VOA)	Yes
Joshua Arnold	Volunteers of America (VOA)	Yes
Jenny Stonerburner	Sacramento County Public Defender's Office	Yes
Karen Thompson	River Oak Center for Children	Yes
Lorrie Lorell	Hope Cooperative	Yes
Melissa Hansen-Rood	Wind Youth	Yes
Mixtli Gonzalez	LSS	Yes
Monica Rocha-Wyatt	Sacramento Co. Department of Behavioral Health	Yes
Noelan Villasenor	River Oak Center for Children	Yes

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Shelly Hubertus	Waking the Village	Yes
Sora Lee	APCC	Yes

SSF Staff	SSF Title
Andrew Geurkink	SSF CoC Specialist
Hamid Bashiri	SSF Senior Data Analyst
Keri Arnold	SSF HMIS Coordinator
Michelle Charlton	CoC Coordinator
Michele Watts	Chief Planning Officer
Tina Wilton	SSF HMIS Manager

Meetings Purpose:
To inform members of the results of the first Annual HMIS Re-Certification Quiz, the Data Security Audit Implementation Plan, the Data Quality Implementation Plan, and the 2020 HMIS Data Standards changes, including the new Coordinated Entry Data Elements.

Agenda Item	Presenter(s):	Time	Item Type
I. Welcome & Introductions	Erica Plumb & Jameson Parker, (Co-Chairs)	10:00 AM (5 minutes)	Informational
Co-Chair Erica Plumb called the meeting to order at 10:04AM. All attendees introduced self.			

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II. Security Audit Report Back	Tina Wilton, SSF HMIS Manager	10:05 AM (30 minutes)	Informational & Discussion

Recap: Overview of Security Audit process (began first week of November, officially ended end of December 2020)

- 49 unique providers, 25 Security Audits still in process
- 10 New DBHS providers who have not yet submitted; however, they have not yet started entering data into HMIS

Trends Identified in Security Audit Checklist: Consumer Notice not posted publicly, Staff not attending meetings, Agency staff not attending trainings outside HMIS, No written plan for remote work, Clients are NOT provided with a copy of the ROI and Consumer Notice, Staff unfamiliar with HMIS Privacy and Security Plan

Feedback:
Cynthia Hunt: Agency's second time participating in Security Audit, no noted concerns
Jenny Stoneburner: Agency's first time participating, felt they did well
Shelly: Felt form was intuitive and user friendly

Suggestion: Since specific language is being used in Audits, Shelly suggested including possible images of what is being referenced, or links to the forms

ROI Authorization Audit:

Recap: Overview of results of ROI Authorization Audit, 2020 (Three types of ROI Reports custom built: ROI: Aged into Adulthood, ROI: Minor Error, ROI: Missing)

- ROI: Aged into Adulthood and ROI: Minor Error errors increased from the beginning of the audit to the end, ROI: Missing decreased

SSF Plan to Provide Additional Support for Areas of Increased Errors: Michele Watts and Lisa Bates of SSF plan to assist with outreach to providers to increase data quality. HMIS Team plans to enhance the trainings, develop stronger data monitoring & mentorship plan. HMIS Team already implemented Open Office Hours two times per week to provide additional support in November 2020.

Feedback:
Cynthia: Are folks aware they need to improve? / **SSF: We are still in the process of notifying those individual agencies**

Action Item: SSF to send results to all those who participated in the Audit. SSF will also send emails to the agencies who have not yet submitted their Audits.

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III. HMIS Recertifications Report Back	Tina Wilton	10:35 AM (5 minutes)	Informational

Recap: Intention was to create new HMIS Recertifications for all HMIS users to take and pass

- Tina: The initial plan was to complete the creation of the HMIS Recertifications in December; however, due to the LSA and the Security Audit, the HMIS Team was unable to complete this task

Action Item: The HMIS Team's current plan is to develop the HMIS Recertification Quiz by the end of February for HMIS & Data Committee approval in April. The HMIS Team intends to develop these quizzes specific to user access role within HMIS.

IV. Committee 2020 Accomplishments & 2021 Goals for CoC Annual Meeting	Co-Chairs & Michele Watts SSF CPO	10:40 AM (30 minutes)	Discussion

Recap: The following items were accomplishments in 2020: 2020 HMIS Privacy & Security Plan (approved by CoC Board on 11/18/20), 2020 HMIS Quality Plan (approved by CoC Board on 11/18/20), Year 2 Annual HMIS Recertification Quiz, Year 2 Annual HMIS Security Audit Process

HMIS & Data Committee 2021 Plan: Annual HMIS Privacy & Security Plan review and revision, Annual HMIS Data Quality Plan review and revision, Further operationalize policies within the HMIS Privacy & Security and Data Quality Plans

Our Key Products: Annual HMIS Privacy & Security Plan, Annual HMIS Data Quality Plan

Feedback:
Cynthia Hunt: Feedback from the Security Audit would be great. Also reported having difficulty reading ROI Report, but was discovered that Cynthia is reviewing the old report, not the new one that was built in embedded Looker
Shelly: Inquired about a glossary of all terms and ways to get folks on the BNL vs. the Community Queue (sentiment echoed by Erica, Cynthia, and James Landreth)
Erica Plumb: Suggested a more user-friendly SSF – Helpful Materials section of SSF website

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Action Item: SSF to provide outreach and feedback to providers regarding results of the Security Audit. SSF will also explore possibility of revamping the SSF website

V. LSA & Data Quality Monitoring Plan Proposal: ● Review of LSA parameters / fiscal years ● Review of what LSA entails and what HMIS Team has observed as a result of LSA	Tina Wilton	11:10 AM (15 minutes)	Discussion

Recap: The LSA for this year was comprised of two fiscal years, fiscal year 2018 and fiscal year 2019. The LSA is due Friday, January 15th, 2021

- The LSA looks at utilization, inventory, and enrollments after a large data set is submitted by the HMIS Administrator. From there, we receive either **Errors** (need to be fixed) or **Warnings** (require either an explanation or correction)
- SSF has significantly decreased the number of Errors and Warnings in the LSA
- The final data set, submitted on January 15th, 2021, will feed into HUD's Stella Report

Action Item: SSF plans to institute monthly or quarterly data review to empower agencies to correct their data proactively. SSF also plans to build additional reports, both in and out of HMIS, to monitor data quality.

Announcements Prior to Adjournment:

- Michele Watts of SSF announced plan to formalize HMIS & Data Committee by recruiting and approving members. The meeting will remain open to everyone, though

Action Item: SSF will distribute membership application to all members

- Cindy Xiong: El Hogar (Guest House) is opening up their phone orientations for folks experiencing houselessness who would like to be connected to mental health services. Call 916-440-1500 and request a phone orientation

VII. Meeting Adjourned at 11:26 AM
Next Quarterly HMIS Data Committee Meeting: Thursday, April 8, 2021

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2020 HMIS Security Audit

49 Unique Providers (Agencies)	14 new DBHS Providers (Joined mid 2019 – 2020)

Security Audit Checklist in Still in Process

25 (51%)	10 new DBHS Providers

Most common items identified on Completed Security Audit Checklists:

1. *Consumer Notice not posted publicly.*
2. *Agencies not currently attending CoC meetings*
3. *Agency staff not attending trainings outside of initial HMIS Training*
4. *No written plan for remote work*
5. *Clients are NOT provided with a copy of the ROI and Consumer Notice*
6. *Staff unfamiliar with HMIS Privacy and Security Plan*

All Agencies that identified items needing a plan, submitted an acceptable plan to resolve those items.

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HMIS Security Audit ROI Report 2020

	Active Enrollments as of 11.4.20	Active Enrollments as of 01.06.21	% ROI Increase or Decrease
	10,419	10,542	
ROI: Missing	475	353	-26%
ROI: Aged Into Adulthood	54	63	17%
ROI: Minor Error	448	456	2%

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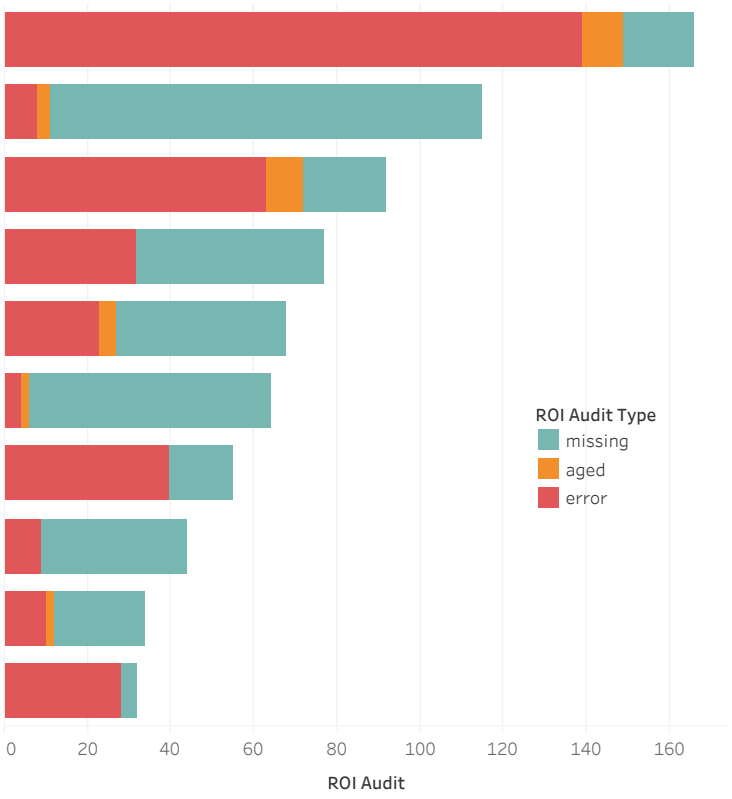
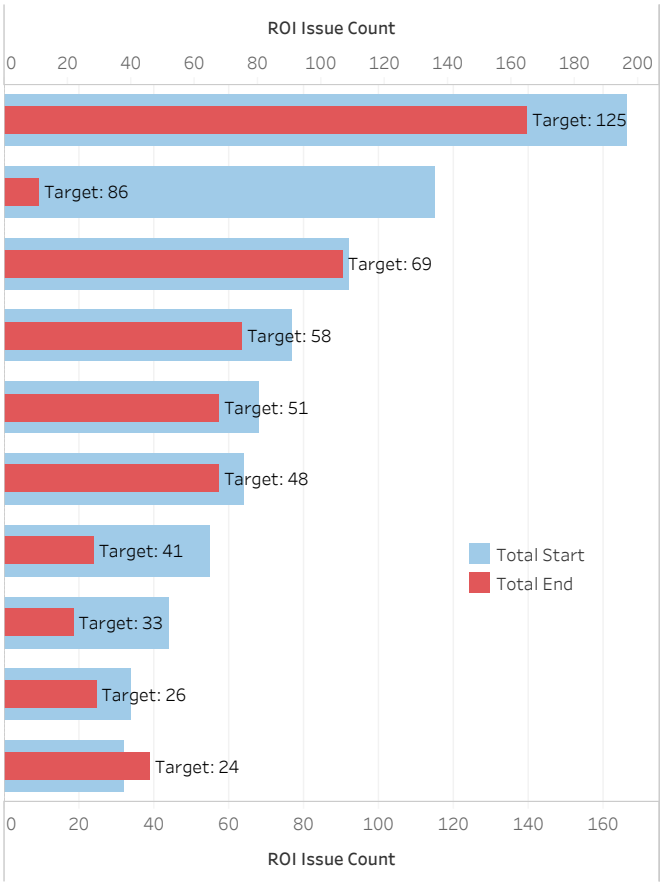
HMIS Security Audit ROI Report 2020

Top 10 Agency ROI 11-4-20



Top 10 Start,End, and Target



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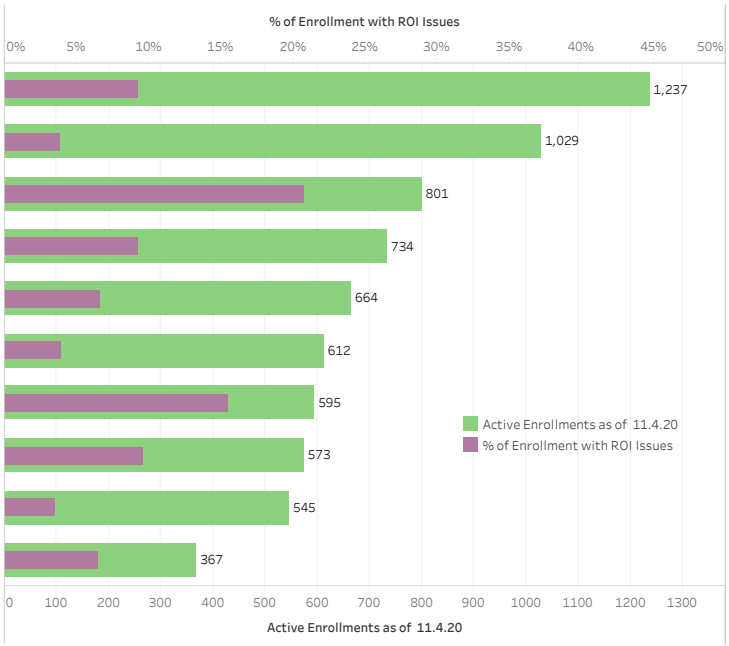
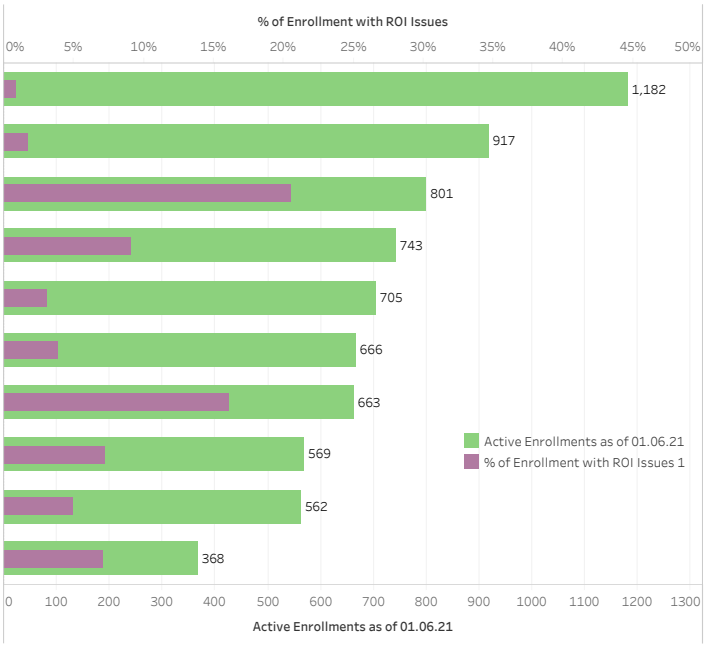
HMIS Security Audit ROI Report 2020

Top10 enrlmnt 11-4-2020



Top10 enrlmnt 1-6-2021



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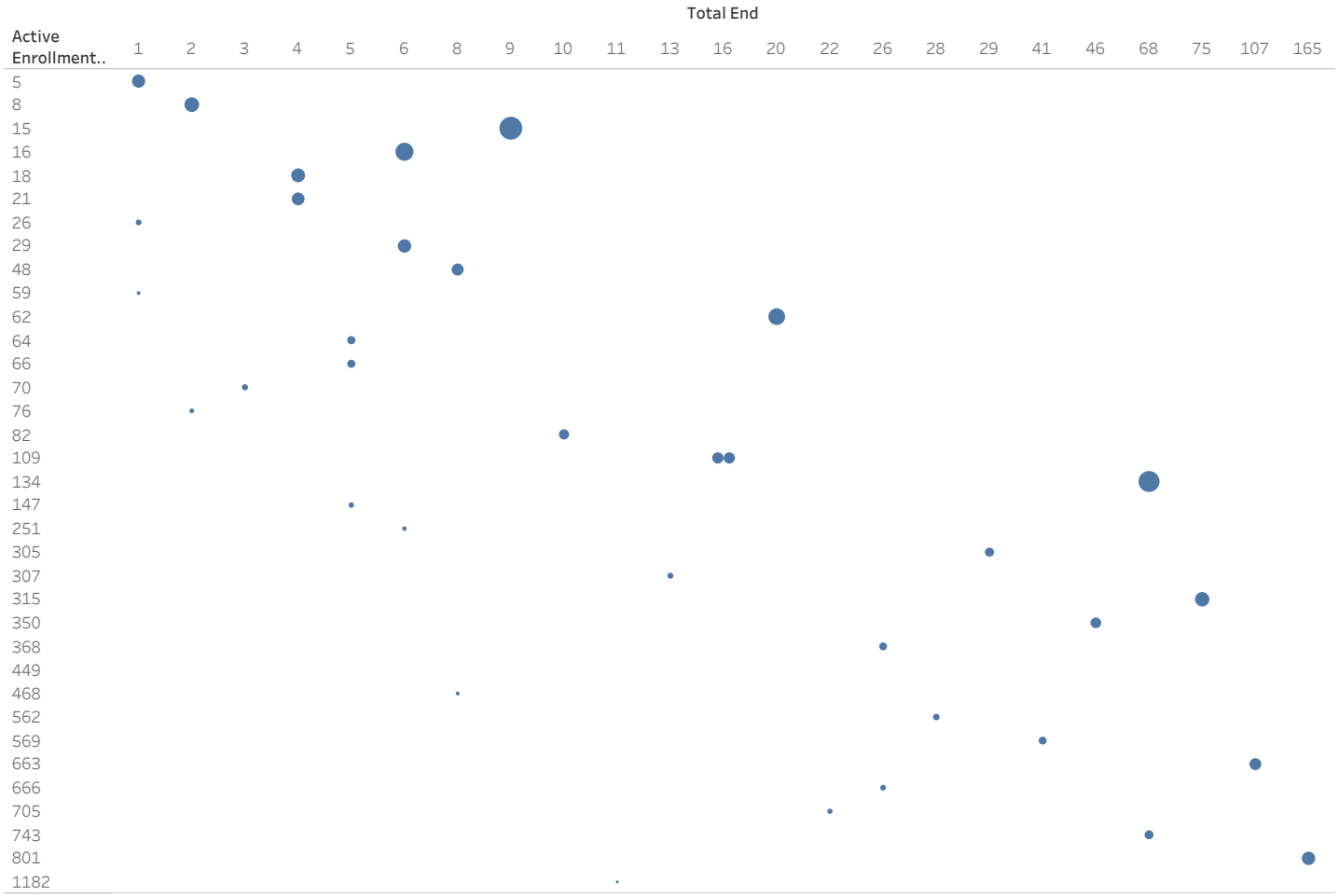
HMIS Security Audit ROI Report 2020

All agencies end counts



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TO: CoC Board Members

FROM: Jameson Parker and Erica Plumb, CoC HMIS & Data Committee Co-Chairs

DATE: March 10, 2021

SUBJECT: CoC HMIS & Data Committee Slate- ACTION (Consent Calendar)

Background

The CoC Board has convened a standing HMIS & Data Committee with informal/open membership for several years. In 2019, the board approved a revised Governance Charter that called for formalization of membership for all the standing committees. With the appointment of a formal HMIS & Data Committee slate this month, the CoC Board will complete the process of moving all of its committees into compliance with the formal membership requirements set forth in the 2019 Governance Charter.

HMIS & Data Committee Purpose and Scope

The HMIS & Data Committee (HDC) with assistance from the Homeless Management Information System (HMIS) Lead Agency, is responsible for carrying out responsibilities of the Sacramento CoC Governance Charter including:

- Ensuring HMIS is operated in compliance with HUD;
- Reviewing local reports to HUD to ensure accuracy;
- Ensuring accurate, timely and comprehensive data is available to inform Sacramento CoC activities;
- Reviewing and recommending changes to the Sacramento CoC Board on privacy, security, and data quality plans consistent with HUD regulations and notices;
- Developing and regularly reviewing HMIS policies and procedures materials; and

- Assisting in the evaluation of the HMIS Lead, as requested by the Sacramento CoC Board.

Member Roles and Responsibilities

The role of committee members is to represent their constituencies and the broader CoC community. The commitment to this committee is ongoing, with the expectation that members will serve an initial two-year term which can be renewed. There are no term limits on CoC Board committees. The HMIS & Data Committee meets quarterly, at 10 AM on the second Thursday of January, April, July, and October and meetings are currently held via zoom. Member responsibilities include reviewing materials prior to meetings, attending meetings, advising staff in advance if a meeting will be missed, and following up on any additional commitments the member makes over the course of the committee's work.

Recruitment Timeline

The committee recruitment and slate development timeline is detailed below.

CoC HMIS & Data Committee Recruitment Timeline	
Recruitment Announcement at CoC Board	Wednesday, February 10, 2021
Recruitment Announcement, Application, and Member Roles & Responsibilities Posted to SSF Website	Friday, February 12, 2021
Application Period	Friday, February 12, 2021 – Friday, February 26, 2021
Application Due Date	Friday, February 26, 2021, 5 PM
Slate Developed	Monday, March 1, 2021 – Thursday, March 4, 2021
CoC Board Approval of Slate	Wednesday, March 10, 2021

Nine (9) applications were submitted by the February 26, 2021 deadline. Seven (7) applicants are being recommended for appointment now and staff will follow up with the other two (2) to further assess their area(s) of interest for service, due to unclear or missing information in their applications.

Proposed HMIS & Data Committee Slate

	Name	Organization
1	Anastasiya Hernandez	Saint John's Program for Real Change
2	Anne-Marie Hooper	Sacramento Self Help Housing
3	Cynthia Hunt	Cottage Housing Inc.
4	Dawn Williams	Sacramento County Department of Health Services - Behavioral Health Services
5	Janel Fletcher	SHELTER, Inc.
6	Josh Arnold	Volunteers of America Northern California & Northern Nevada
7	Mixtlicoatl Gonzalez	Lutheran Social Services of Northern California

Every proposed member on the slate above represents an agency currently using the HMIS, with wide variation in terms of the number of agency beds/units participating in the system. The committee co-chairs welcome the participation of these HMIS participating agencies. Additionally, staff have been directed to further coordinate on the identification and recruitment of members representing agencies that are not currently participating in HMIS to more fully round-out perspectives within the group. The co-chairs may return with additional appointment recommendations in the coming months.

CoC Board Action Requested

Approve the recommended slate for the CoC Board HMIS & Data Committee as presented.

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Updated: March 2021

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2021 HMIS & Data Committee Roster

Member Name	Area of Representation	Title / Organization
Anastasiya Hernandez	Mental Health Services	Clinician, Saint John's Program for Real Change
Anne-Marie Hooper	Housing Authority	Director, Contracts and Procurement, Sacramento Self Help Housing
Cynthia Hunt	Housing Authority	Program Manager, Cottage Housing, Inc.
Dawn Williams	Local Government	Health Program Manager, Research and Evaluation, Sacramento County Dept. of Health Services
Erica Plumb, Co-Chair	**Housing Authority**	**Associate Director, Supportive Services, Mercy Housing**
Jameson Parker, Co-Chair	**Business Community & Street Outreach**	**Director, Advocacy & Capital Improvements, Midtown Assoc.**
Janel Fletcher	Housing Authority	Director, Impact and Data Analytics, SHELTER, Inc.
Josh Arnold	Social Services	Executive Assistant, Volunteers of America Northern California & Northern Nevada
Mixtlicoatl Gonzalez	Social Services	Office Coordinator, Lutheran Social Services of Northern California

Questions/Concerns? Please contact Tina Wilton HMIS Manager, SSF

HMIS & Data Committee (HDC) Biographies - April 2021

(Listed by First name)

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Anastasiya Hernandez

My name is Anastasiya Hernandez and I am an Assistant Director of Integrated Health Services, at Saint John's Program for Real Change. I was drawn to social work in 2014 and began volunteering with an affordable housing organization. It led me to leave a career in telecommunications and return to school to pursue a Master's degree in Social Work. Today I have the privilege of working directly with women and children experiencing homelessness, and play a small part in their journey to independent living. In my free time I like to be with my family, cook, and spend as much time outdoors as possible.

Anne-Marie Hooper

I have 15 years' experience in the non-profit, homeless services field and have a passion to help those experiencing homelessness. I graduated in 1991 with a degree in Legal Services and have found myself in several positions and careers that have provided me with a skill set that is well rounded and lends to my ability to see the big picture and provide a multifaceted approach to problem solving for my agency. My professional evolution has brought me full circle from private for profits to the non-profit realm, and a calling that fills the soul. Knowing that the work that I do supports our community efforts to house individuals experiencing homelessness does far more for me than negotiating a home loan or other activity I have done in the past.

Cynthia Hunt

Cynthia Hunt is the Program Manager for Cottage Housing, Inc., a non-profit that develops healing communities that are solution-focused, participant-driven and strength-based, where homeless people help themselves – and each other – through their transition from the streets to

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self-sustainability. Cynthia has been employed with Cottage Housing Inc. since 2002 and she is also an alumni of the Quinn Cottages program having completed as a successful graduate in 2000. Cynthia received her certification in Human Services and Chemical Dependency at American River College. In reaching tenure with Cottage Housing, Cynthia has served on several committees and sub-committees involving homelessness. She is devoted to living in recovery and helping others live in recovery as well as becoming a better version of themselves for themselves, families, and their community.

Dawn Williams

I graduated from Sacramento State in 1999 with a Degree in Sociology. In December of 1999, I was recruited by Sacramento County Behavioral Health (BHS) to be the evaluator for the Homeless Mentally Ill pilot program (AB34/AB2034) the County was awarded. These programs were the catalyst to MHSA. With the expansion to MHSA, I played a key role in evaluating many of the programs as well as other Medi-Cal funded programs. In 2014, I was promoted to Health Program Manager of the Research, Evaluation and Performance Outcomes (REPO) unit in BHS. With the support of eight data analysts, I oversee all of the data collection, analysis and reporting for all programs in BHS, including Substance Use Prevention and Treatment Programs.

Erica Plumb, HDC Co-Chair

As Associate Director of Supportive Services with Mercy Housing, I currently oversee our Permanent Supportive Housing portfolio in Inland Northern California. I have been with the organization for 10 years. Our mission is to create stable, vibrant, and healthy communities by developing, financing, and operating affordable, program-enriched housing for families, seniors, and people with special needs who lack the economic resources to access quality and safe housing. We partner closely with local entities and supportive services providers at our 10 local PSH communities. Within the CoC, I serve as Co-Chair of the HMIS & Data Committee and also sit on

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the Coordinated Entry System Committee and Project Review Committee. I have a Master's Degree in Gerontology at California State University, Sacramento and a BA from UC Santa Barbara in Global Studies. In my personal time, I enjoy spending time with family, traveling, and being outdoors.

Jameson Parker, HDC Co-Chair

Since 2011, Jameson Parker has worked in Sacramento in the field of policy and public administration. He graduated from San Diego State University with a Bachelor of Arts in Public Administration with an emphasis on local government. From 2012 to 2016, Jameson spent time working at the City of Sacramento in Councilmember Steve Hansen's office as a District Representative. Jameson joined the Midtown Association team in 2016 as the Advocacy and Strategic Communications Manager. He's worked on complex policy discussions like the Central City Specific Plan, as well as capital improvement projects like the installation of bollards on 20th Street. He now serves as the Director of Advocacy and Capital Improvements overseeing initiatives that increase active transportation, support infill development, and reduce the impacts of homelessness in Sacramento. Additionally, he oversees the Placemaking program at the organization.

Janel Fletcher

Janel Fletcher is an experienced database administrator, systems analyst, and public health professional who believes housing is a human right. The intersections of her experience forge her commitment to data integrity for effective goal setting, accountability, and measurable outcomes. She actively works in partnership with communities to end and prevent homelessness. Janel currently serves as Director of Impact and Data Analytics with SHELTER, Inc.

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Josh Arnold

Josh Arnold is a local of Sacramento and graduated from Rio Americano High School in 1998. He received his Bachelor of Science Degree in Public Administration from National University and graduated Magna Cum Laude. He is an honorably discharged veteran of the United States Marine Corps. He has been employed by Volunteers of America Northern California & Northern Nevada for the past 4 years. He started as a Case Manager in the SSVF program and then brought over to the VOA Operations Team. His operations work includes planning and program implementation, as well as HMIS Security Officer and Data Analyst.

Mixtlicóatl Gonzalez

Mixtlicóatl Gonzalez is the Office Coordinator for LSS of Northern California. Her responsibilities include managing several databases including HMIS databases across three continuums, ensuring agency data practices meet/exceed contractual requirements, and in house database training. She has over ten years of experience working in the field of social services in both the government and non-profit sectors. Mixtlicóatl is a native to the Sacramento region graduating from CSU Sacramento with a B.A. Her children and husband keep her busy when she is not in the office.

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Sacramento Continuum of Care (CoC) 2020 Committee Overview

Sacramento Steps Forward | March 10th, 2021

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List of the Sacramento CoC Committees:

Executive Committee

Governance Committee

Racial Equity Committee

Homeless Management Information System (HMIS) & Data Committee

Project Review Committee

Coordinated Entry System Committee

System Performance Committee

2021 Point-In-Time (PIT) Count Subcommittee

Youth Action Board (YAB)

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Sacramento Continuum of Care Executive Committee

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Sacramento Continuum of Care Executive Committee

Our Purpose: comprised of the 3 Sacramento CoC Board officers (Chair, Vice Chair, Secretary) is responsible to carry out officer responsibilities & calls all meetings of the Sacramento CoC & Sacramento CoC Board.

Our 2020 Key Products:

- CoC Board Meetings & Workshops Agendas
- Committee Slates:
  - System Performance Committee
  - Coordinated Entry System Committee
  - Project Review Committee

Our 2020 Accomplishments:

- Leadership on CoC COVID-19 Encampment Response
- CoC Board Workshops:
  - Racial Equity
  - Outreach Strategies
  - System Performance Measures

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Sacramento Continuum of Care Executive Committee

Our Purpose: comprised of the 3 Sacramento CoC Board officers (Chair, Vice Chair, Secretary) is responsible to carry out officer responsibilities & calls all meetings of the Sacramento CoC & Sacramento CoC Board.

Our 2021 Goals:

- HMIS & Data Committee Slate
- CoC Planning: Increased Education and Community Engagement

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Sacramento Continuum of Care Governance Committee

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Sacramento Continuum of Care Governance Committee

Our Purpose: is responsible for the ongoing evaluation of the CoC structure & operations, including a review of the governance charter, oversees the CoC Board strategies, activities, budget, and year-end reconciliation.

Our 2020 Key Products:

- Annual CoC Governance Charter
- Annual CoC Board Membership Slate
- Annual CoC Board Executive Committee Slate

Our 2020 Accomplishments:

- April Wick appointed new committee chair
- Due to capacity limitations of SSF staff and the CoC Board, the Governance Committee did not meet in 2020

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Sacramento Continuum of Care Governance Committee

Our Purpose: is responsible for the ongoing evaluation of the CoC structure & operations, including a review of the governance charter, oversees the CoC Board strategies, activities, budget, and year-end reconciliation.

Our 2021 Goals:

- Revisit the September 2019 CoC Governance Charter and revise as needed
- Serve as Nominating Committee to develop the annual CoC Board membership & Executive Committee slates

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Sacramento Continuum of Care
Racial Equity Committee

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Sacramento Continuum of Care Racial Equity Committee

Our Purpose: to uncover the scope, causes, and potential solutions of race serving as a predictor for homelessness in Sacramento.

Our 2020 Key Products:

- Materials and Professional Development Assignments for a Three-Part Training Series
- Report #1: Findings from BIPOC PLE Interviews & Listening Sessions
- Report #2: Findings from Research on Best & Promising Practices
- Recording and Materials from Two Stakeholder Forums
- Final Action Plan

Our 2020 Accomplishments:

- Diverse Committee Slate
- Final Committee Purpose Statement
- Final Workplan
- Approved Plan with Protocols & Questions for BIPOC PLE Interviews & Listening Sessions
- Training #1, Conducted Twice (Approximately 72 Attendees)
- Training #1 Follow Up: Courageous Conversation

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Sacramento Continuum of Care Racial Equity Committee

Our Purpose: to uncover the scope, causes, and potential solutions of race serving as a predictor for homelessness in Sacramento.

Our 2021 Goals:

- Utilizing Community Based Participatory Research, Conduct 15-25 BIPOC PLE Interviews & Listening Sessions
- Host Two Stakeholder Forums
- Conduct Research on Best and Promising Practices
- Educate the CoC through a Three-Part Training Series with Professional Development Assignments
- All Activities to Culminate in a Final Action Plan to Present to the CoC Board

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Sacramento Continuum of Care Homeless Management Information System (HMIS) and Data Committee

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Sacramento Continuum of Care HMIS and Data Committee

Our Purpose: is responsible, with the assistance from the HMIS Lead Agency, HMIS is compliant with HUD, provides comprehensive data, & develops HMIS policies & procedures to inform the Sacramento CoC.

Our 2020 Key Products:

- Annual HMIS Privacy & Security Plan
- Annual HMIS Data Quality Plan

Our 2020 Accomplishments:

- 2020 HMIS Privacy & Security Plan approved by the CoC Board 11/18/20
- 2020 HMIS Data Quality Plan approved by the CoC Board 11/18/20
- Year 2, Annual HMIS Recertification Quiz
- Year 2, Annual HMIS Security Audit Process

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Sacramento Continuum of Care HMIS and Data Committee

Our Purpose: is responsible, with the assistance from the HMIS Lead Agency, HMIS is compliant with HUD, provides comprehensive data, & develops HMIS policies & procedures to inform the Sacramento CoC.

Our 2021 Goals:

- Annual HMIS Privacy & Security Plan review and revision
- Annual HMIS Data Quality Plan review and revision
- Further operationalize policies within the HMIS Privacy & Security and Data Quality Plans

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Sacramento Continuum of Care Project Review Committee

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Sacramento Continuum of Care Project Review Committee

Our Purpose: is responsible for overseeing a collaborative process to select projects for the HUD CoC funding application & for evaluating project performance of HUD-funded activities.

Our 2020 Key Products:

- Annual HUD CoC Program NOFA competition- review and ranking of renewal and new projects
- On-site TA to CoC providers focused on NOFA competition performance
- Membership Policy
- Defunded Projects Policy
- 3 provider surveys re. scoring criteria input

Our 2020 Accomplishments:

- On-going dialogue and support for providers re. uncertainty of FY2020 NOFA
- Training & data review from SSF to build PRC understanding of key topics impacting NOFA scoring factors
- No FY2020 HUD CoC Program NOFA competition

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Sacramento Continuum of Care Project Review Committee

Our Purpose: is responsible for overseeing a collaborative process to select projects for the HUD CoC funding application & for evaluating project performance of HUD-funded activities.

Our 2021 Goals:

- Quality of services scoring factor improvements
- Performance targets by project type and/or subpopulation
- Build PRC relationship with ESG providers (unmet Charter responsibility)
- Focus on racial equity & lived experience re. membership

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Sacramento Continuum of Care
Coordinated Entry System Committee

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Sacramento Continuum of Care Coordinated Entry System Committee

Our Purpose: is responsible for the design & implementation of the local Coordinated Entry System (CES) & evaluates its functioning & impact on improving access & connection to services to resolve homelessness.

Our 2020 Key Product:

- CES Evaluation

Our 2020 Accomplishments:

- Amended CES prioritization schema to incorporate COVID-19 vulnerability
- Developed the Rapid Access Problem Solving (RAPS) proposal - adopted by the CoC Board in November 2020
- Ratified as an official committee of the CoC Board
- Input to SPC on CES access & system map
- Focus on case conferencing

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Sacramento Continuum of Care Coordinated Entry System Committee

Our Purpose: is responsible for overseeing a collaborative process to select projects for the HUD CoC funding application & for evaluating project performance of HUD-funded activities.

Our 2021 Goals:

- Evaluate Rapid Access Problem Solving (RAPS) pilot
- Goal 1: Make CES information and materials publicly available & easily accessible
- Goal 2: Develop a plan to expand CES resources including drop-in and outreach services
- Goal 3: Collaborate with Racial Equity committee to evaluate CES disparities

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Sacramento Continuum of Care System Performance Committee

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Sacramento Continuum of Care System Performance Committee

Our Purpose: is responsible for system wide planning to ensure the overall housing & service system meets the needs of individuals, including unaccompanied youth, & families experiencing homelessness.

Our 2020 Key Products:

- HIC review
- PIT development (delegated to PIT subcommittee)
- NOFA system performance elements
- System performance measures review
- Gaps analysis

Our 2020 Accomplishments:

- System mapping and gaps analysis methodology
- System Maps for CE, DHA, SHRA, and Behavioral Health
- Client Movement Dashboard
- Project Access Matrix

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Sacramento Continuum of Care System Performance Committee

Our Purpose: is responsible for system wide planning to ensure the overall housing & service system meets the needs of individuals, including unaccompanied youth, & families experiencing homelessness.

Our 2021 Goals:

- Gaps Analysis
- Workshop on System Maps and Gaps Analysis
- HIC review
- 2022 PIT planning
- NOFA process
- System Performance Improvement Plan

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Sacramento Continuum of Care
2021 Point-in-Time (PIT) Count Subcommittee

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Sacramento Continuum of Care
2021 Point-in-Time (PIT) Count Subcommittee

Our Purpose: is responsible with debriefing and analyzing the implementation of the 2021 Point-in-Time Count and to develop recommendations for forthcoming Point-in-Time Counts and PIT Committees.

Our 2020 Key Product:

- PIT Timelines & Work Plan

Our 2020 Accomplishments:

- Subcommittee seated July 2020
- Adjusting local unsheltered PIT approach in light of COVID-19 pandemic and associated HUD guidance

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Sacramento Continuum of Care
2021 Point-in-Time (PIT) Count Subcommittee

Our Purpose: is responsible with debriefing and analyzing the implementation of the 2021 Point-in-Time Count and to develop recommendations for forthcoming Point-in-Time Counts and PIT Committees.

Our 2021 Goal:

- Oversee implementation of potential 2022 unsheltered PIT approach

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Sacramento Continuum of Care
Youth Action Board (YAB)

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Sacramento Continuum of Care Youth Action Board

Our Purpose: is responsible to advise the Sacramento CoC Board on policies & activities that relate to preventing & ending youth homelessness.

Our 2020 Accomplishments:

- Appointment of representative to the YAB-dedicated seat on the CoC Board (Jan. 2020).
- Provided recommendations to CoC for Homeless Housing, Assistance & Prevention (HHAP) youth set-aside funds.

Our 2021 Goal:

- Developing additional strategies for connecting the YAB and the CoC

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Thank you!

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Date: April 2, 2021

To: COC HMIS and Data Committee

From: Sacramento Steps Forward

Subject: **HMIS User Certification Process**

This memo details the process Sacramento Steps Forward will employ to administer the HMIS quiz to recertify HMIS Users.

The HMIS Quiz will be required of all HMIS users. The quiz will consist of multiple choice questions in 5 separate Parts, General Information, Recording Data, Assessments, Reporting, and Supervising Responsibilities. Users will be required to complete and pass some or all Parts of the Quiz depending upon their primary HMIS User Access Role. Multiple links will be offered to all Users, either to complete all necessary Parts of the Quiz as a whole in one sitting or to complete the Parts individually at their convenience. The Quiz is in Google Forms and can be taken anytime and anywhere. All 5 Parts of the Quiz are in multiple choice question format with only one possible answer. At the end of the quiz, users will see their answers along with the correct answers (if different from theirs) to each question. Sacramento Steps Forward will notify them and their supervisors within 2 business days of their score. If they do not pass one or more of the Parts, they will only need to re-take the Part that they failed. Sacramento Steps Forward will provide the User with NEW links to the Parts they will need to retake. These NEW links will include logic that gives the User direct feedback on whether they have answered questions incorrectly; and, will allow them to edit their response before resubmitting their Quiz.

Initial Notice

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Sacramento Steps Forward will send out a notice to the Supervisors and Directors of all the active Agencies participating in HMIS 30 days prior to the HMIS Certification Quiz. This notice will alert them to the timeline for the HMIS Certification Quiz, and it will outline the following process:

- The dates of the HMIS Certification Quiz period and when users will receive the links to take the quiz. Users will be provided a two-week window to complete the Quiz to provide them flexibility with their schedule and to retake the Quiz if needed. The proposed dates to be determined by the Committee.
- The resources available to all users to assist with the passing of the HMIS Certification Quiz. These include:
    - HMIS Users' Training Manual (most up-to-date version)
    - VI-SPDAT Training Manual
    - HMIS New Users Agreement
    - VI-SPDAT Users Agreement
    - 2020 HMIS Data Standards Manual
    - Link to the Bitfocus HMIS clarity help website
    - Links to HMIS New User training videos
    - Weekly Zoom Meetings to answer questions (Open Office Hours)
- Information on when users may expect to receive results and when it will be reported to supervisors. Sacramento Steps Forward will also include information on opportunities to re-take portions of failed quiz submissions.
- The notice will detail the final due date for passing the Quiz. It will also say on what date a user's account will be deactivated if they do not complete or pass the Quiz.
- The notice will also provide supervisors information on how to assist their staff to re-activate their account if they have failed the quiz.

Second Notice

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A second notice will be sent 14 days prior to the HMIS Certification Quiz to all active HMIS end users alerting them of the HMIS Certification process, the Quiz, and the Quiz timeline. The notice will include:

- A description of the Quiz and the Quiz taking process.
- Dates of the HMIS Certification Quiz period & when they will receive the link to take the quiz. The proposed period to be determined by the Committee.
- Resources available to assist with the passing of the Certification Quiz (See list above)
- Information on when to expect to receive their results, as well as information on opportunities to re-take portions of failed quiz submissions.
- Final due date for a passing score and date when their account will be deactivated if they either did not take the Quiz or did not pass.
- Process for reactivating their account if it has been deactivated due to failing the Quiz.

All End Users will have 2 weeks to complete and pass the Certification Quiz. The Quiz will open on a Monday and close on the 2nd Friday after the release. An email will be sent on the Friday prior to the opening with the necessary links. Again, the Quiz is in Google Forms and can be taken anytime and anywhere. The Quiz consists of 5 Parts, all multiple choice quizzes. At the end of the quiz, users will see their answers along with the correct answers (if different from theirs) to each question. Sacramento Steps Forward will notify them and their supervisors within 2 business days of their score. If they do not pass any of the Parts, they will only need to re-take the Part that they failed. Sacramento Steps Forward will provide links to the Parts that they will need to take again.

Two weeks after the close of the Quiz, any User that either did not pass or did not take the HMIS Certification Quiz will have their accounts de-activated. After an account is deactivated for failing, it can be re-activated with the

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submittal of a support plan devised between the End User and their Direct Supervisor, which will then need to be approved by the HMIS department. Plans should include strategies for additional training and mentorship for the End User.

Any account that has been de-activated for not taking the Quiz or de-activated due to inactively and the User did not take the quiz, they will need to take and pass the Quiz before their account will be re-activated again.

Additionally, should an End User choose to not complete and pass all the required Parts for their Access Role, their Access Role will be adjusted accordingly.

HMIS Certification

Purpose:
The HMIS Annual Certification Quiz is intended to provide all HMIS End Users with a comprehensive Annual refresher training, with the "Quiz" being faster and more convenient for the HMIS End User. The Quiz is able to cover a vast range of information in a short amount of time; and the Google Form format provides the flexibility for the HMIS End User to complete it at their own pace and in their own timeframe.

Components:
The Quiz were be comprised of 5 distinct Parts, all of which will only have multiple choice questions with only one possible answer. The HMIS End User Access Role will determine which Parts are required to complete to maintain that Access Role. (See Table)

Current Primary Access Roles	Part 1 General Information	Part 2 Recording Data	Part 3 Assessments	Part 4 Reports	Part 5 Supervisors
Agency Staff: Direct Service Staff WITH Assessments	Required	Required	Required	Required	If applies
Agency Staff: Direct Service Staff - NO Assessments	Required	Required	Required	Required	If applies
Agency Staff: Agency Manager	Required	Required	Required	Required	Required
Agency Staff: Program Manager	Required	Required	Required	Required	Required
Agency Staff: Services Only	Required	n/a	n/a	n/a	n/a
Agency Staff: Read Only Rights	Required	n/a	n/a	n/a	n/a
Reporting and Monitoring Only - Advanced	Required	n/a	n/a	Required	If applies
Reporting and Monitoring Only	Required	n/a	n/a	Required	If applies
CoC Monitor/Analyst *(SSF Staff only)*	Required	Required	Required	Required	If applies
CES: Lead *(SSF Staff only)*	Required	Required	Required	Required	Required
CES: Referral Specialist (Home) *(SSF Staff only)*	Required	Required	Required	Required	n/a

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PART 1 (Quiz 1) - General Information (All Users)

Section 1, HMIS Overview (3 questions)

1. What is HMIS?
   a. HMIS (Homeless Management Information System) is a **HUD-compliant database** used to capture demographic information, program enrollments, services rendered, etc. of participants who are experiencing homelessness or, in some cases, at risk of experiencing homelessness.
   b. A large database that collects information on any and all people who live in Sacramento.
   c. A tracking device.
   d. A large database that providers use to input information related strictly to a client's medical history.

2. Which of the following reports does HMIS generate on behalf of the **entire** Continuum of Care (community of homeless providers) that are submitted to HUD on an annual basis?

3. What are the benefits of providers using HMIS?

Privacy & Security (7 questions)

1. If your HMIS account goes inactive, what should you do?

2. What do you do if you forget your password or get locked out of HMIS?

3. You have a staff person who has not yet been trained in HMIS and you want them to run a report for you. It's okay for you to give them your HMIS user login to run the report.

4. You have a family member that you lost contact with ten years ago. You suspect they may now be experiencing homelessness. It's okay to look them up in HMIS.

5. A person who does not have access to HMIS requests information regarding a client, or multiple clients, out of HMIS. What should you do?

6. You have a question about a client record and you're emailing the HMIS Team about it. You will need to include the client's full name, their Date of Birth, and their Social Security Number to ensure the HMIS Team knows to whom you are referring.

7. It is okay to have your computer and/or device save your HMIS login password to save time.

Section 2, Navigating HMIS (6 questions)

1. How do you switch agencies if you have access to multiple agencies?

2. How do you **independently** troubleshoot observed glitches or errors you're experiencing within HMIS?

3. How many BUSINESS days do you have to enter data (program enrollments, services, assessments, and program exits) into HMIS?
   a. Whenever you want to.

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b. Within three (3) business days.
c. Data never needs to be entered into HMIS.

Section 2, Navigating HMIS (6 questions) continued……

4. HMIS does **NOT** allow me to input my work email or work phone number into HMIS.
5. The top dark colored bar at the top of HMIS is called the
6. The box comprised of 9 small squares on the Global Task Bar is called the

Section 3, Project Types in HMIS (9 questions)

1. What is a Supportive Services Only (**SSO**) project and which data elements MUST be recorded for this project type?
   a. An SSO is a project that provides positive reinforcement.
   b. I don't know
   c. An SSO is a project that offers stand-alone supportive services to address the special needs of participants (such as child care, employment assistance, and transportation services) and has associated housing outcomes. In addition to the standard data elements (Program Entry screen, Program Status and Annual Assessments, **services**, and Program Exit Screen), Current Living Situation is required to be completed whenever a household's housing status changes.
2. What is a Transitional Housing (**TH**) project and which data elements MUST be recorded for this project type?
3. What is a Permanent Supportive Housing (**PSH**) project and which data elements MUST be recorded for this project type?
4. What is a Rapid Re-housing (**RRH**) project and which data elements MUST be recorded for this project type?
5. What is an Emergency Shelter (**ES**) project type which data elements MUST be recorded for this project type?
6. There are two different types of Emergency Shelters (ES) in HMIS, **Entry/Exit (E/E) Emergency Shelte**r and **Night-by-Night (NbN) Emergency Shelter**. What is the difference between the two and what different data elements are recorded within each ES?
7. What is a Street Outreach project type which data elements MUST be recorded for this project type?
8. What is a Homeless Prevention (**HP**) project type which data elements MUST be recorded for this project type?
9. What is a Day Shelter project type which data elements MUST be recorded for this project type?

PART 2 (Quiz 2) – Recording Data (Data Entry Staff & HMIS Supervising Staff)

Section 1, Data Entry: Client Records and Program Enrollments (19 questions)

1. When you begin the process of enrolling a client into your program, what should you ALWAYS do first?
   a. Ensure the client has an active ROI.

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b. Review the client's enrollment history for potential collaboration with other providers and to ensure your enrollment does not conflict with another program enrollment. (e.g., You're enrolling them in an Emergency Shelter and they have another active Emergency Shelter enrollment.)
c. Review the client's profile, contact, and location tabs and update/correct as necessary.
d. All of the provided answers.

2. Why are entering services so important?

3. How would you make corrections on a closed/ended program enrollment?

4. You're working with a client who recently turned 18 years old. You review their ROI status and notice that the documentation type is listed as "Household", the designation reserved for minors when parents or guardians sign a consent on their behalf. This ROI expired on their 18th birthday, so they no longer have a valid ROI in HMIS. What should you do?

5. What is a Status Assessment and when do you complete one?

6. What is an Annual Assessment and when do you do one?

7. All program enrollees must be enrolled at the same time.

8. You can exit the Program Head of Household from an enrollment and keep the other Household members in the program enrollment.

9. Who should be enrolled in a Street Outreach program?

10. What is the Date of Engagement and where is it recorded?

11. What is a Current Living Situation (CLS) and what project types need to complete them?

12. What programs have Auto-Exits and when do they occur?

13. You are enrolling a new client into your program and your client has an active enrollment in another program, housing/sheltering or otherwise, what should you do?

a. Reach out to the assigned staff from the other program(s) to coordinate services for your shared client. You can find their contact information (email and phone number) by clicking on their initial "bubble".
b. Talk with your client about their other enrollment and services they are receiving from that provider.
c. Be sure your program enrollment will not duplicate or conflict with the existing enrollment. (e.g., A client cannot sleep in 2 places at the same time. Therefore, a client should never be enrolled in 2 emergency shelters at the same time.)
d. All of the provided answers.

14. When should you record a Bed Night service for a Night-by-Night (NbN) Emergency Shelter and where does the service get recorded?

Section 1, Data Entry: Client Records and Program Enrollments (19 questions) continued…..

15. For Entry/Exit (E/E) Emergency Shelters and Transitional Housing projects, if you check the client's program service history and notice that the "Housed with" service was not automatically provisioned when the client is first enrolled in your program, what should you do? (Auto provisioning is a feature that the HMIS Team implements during the building of E/E Emergency Shelters and Transitional Housing projects within HMIS.)

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16. How do you determine the start and end date for the “Housed with” service?
17. In Permanent Housing projects (e.g., PSH, RRH, etc.), when should you enter a Move-In Date and where does the Move-In Date get recorded?
18. When should you record Rental Assistance and where is it recorded?
19. When should a household be exited from a project?

Section 2, Receiving Referrals (5 questions)

20. Which department of Sacramento Steps Forward makes referrals [in HMIS] to participating housing/sheltering programs?
21. Where do you request referrals, view received referrals, process referrals in HMIS?
22. You are in the Referrals section of HMIS, which tab should you be under to view your received/pending referrals?
23. You are in the Referrals section of HMIS, which tab should you be under to request a referral(opening) or view the openings you have already submitted?
24. You have received a referral and it is in Pending Tab, what do you do next?

Part 3. Assessments

Section 1, General Assessment Questions:

1. What are all the potential Assessments that could be under the Assessments Tab. (Note: The available assessments vary depending on the agency’s needs.)
   a. VI-SPDAT (Singles, Families, and TAY)
   b. Shelter Survey
   c. COVID 19 Response Shelter Survey
   d. Problem Solving - Request for Financial Assistance
   e. Rehousing Needs Assessment
   f. Move On Survey
   g. Self-Sufficiency Matrix
   h. Custom Assessments requested by your Agency
   i. All of the provided answers.
2. Where is the Assessment Tab located?
3. While in a client’s record, you navigate to the client’s Assessment tab. Under the Assessment header, there are no assessments listed and you are unable to conduct any assessment with the client. What is the **likely** cause of this?

Section 2, VI-SPDAT (Vulnerability Index – Service Prioritization Decision Assistance Tool)

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The **VI-SPDAT** is a pre-screening, or triage tool that is designed to be used by providers within a community to quickly assess the health and social needs of homeless persons and match them with the most appropriate support and housing interventions that are available.
There are 3 different VI-SPDAT Tools.

- Singles for Adults 25 years of age or older with no children
- Families for Households with both Adults (18 years of age or older) and Minor Children (17 years of age and younger)
- TAY for Transition Age Youth (18 to 24 years of age)

1. All agencies have access to conduct the VI-SPDAT in HMIS.
   a. True
   b. False. While all agencies have access to view VI-SPDATs conducted with households, only agencies that work directly with households who are experiencing unsheltered or sheltered homelessness will have access to conduct the VI-SPDAT. (For example, an agency that only has PSH programs would not need to conduct the VI-SPDAT with their clients.)

2. When SHOULD you conduct a VI-SPDAT?

3. You are about to conduct a VI-SPDAT with a 24 year old person with a 2 year old child. Which VI-SPDAT do you use?

4. You have been working with an individual for a couple of weeks and have built some rapport. Today, you are conducting the VI-SPDAT with them and you know they are not answering the questions truthfully. What do you do?

Section 2, VI-SPDAT continued….

5. You are conducting the VI-SPDAT with an individual. It appears that they do not understand many of the questions. What do you do?

6. What is the purpose of the VI-SPDAT and what function does it serve?

7. You have completed a VI-SPDAT with your client(s). What is the next step?

8. You are working with an individual whose primary language is Spanish. You speak a little Spanish, but are not fluent. From your interactions with the person so far, you believe they will not understand most of the questions on the VI-SPDAT. Is it OK to ask a Spanish speaking co-worker to assist with translation?

Section 3, Shelter Survey (6 Questions):

The Shelter Survey is a survey that assesses a person's sheltering needs. It is a current requirement if you are hoping to refer a person(s) to a shelter program that receives its referrals via Coordinated Entry (CE), which is a Department that is managed by Sacramento Steps Forward.

1. Which agencies may conduct the Shelter Survey?

2. You should conduct a Shelter Survey with a client who expresses interest in emergency shelter AND is experiencing unsheltered homelessness.

3. You encounter a client who has been consistently staying with a friend for one month, but they express interest in a shelter referral via Coordinated Entry. Is this person currently eligible for a shelter referral?

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4. What makes referrals to shelters that participate in Coordinated Entry different from shelters that do NOT participate in Coordinated Entry?

5. You are working with a Client that is currently in an Emergency Shelter, but they want to be in a different shelter. Can you conduct the Shetler Survey with them?

6. You have completed the Shelter Survey with all adults who are seeking shelter. What should you do next?

Section 4, COVID-19 Response Shelter Survey (3 Questions):

The COVID-19 Response Shelter Survey is an assessment tool that is utilized to prioritize people experiencing homelessness that need to isolate/shelter in place because they have COVID-19 or may be of higher risk of complications if they were to contract COVID-19. It is the assessment tool that is required to potentially make a referral to the COVID-19 Shelter System.

1. When should you conduct a COVID-19 Response Shelter Survey with a client(s)?

2. You are working with a couple, only one of them meets the criteria of being at higher risk of complications if they were to contract COVID-19. Do you need to conduct the assessment with both people in order for them to be referred to the shelter together?

3. After you've completed the COVID-19 Response Shelter Survey, what should you do next?

.

Section 5, Move On Survey:

Survey Description: Under Development

- When to conduct?
- Nuances of the survey
- What are the next steps after completing?

Questions: Under Development

Section 6, Problem Solving - Request for Financial Assistance:

Survey Description: Under Development

- When to conduct?
- Nuances of the survey
- What are the next steps after completing?

Questions: Under Development

Section 7, Rehousing Needs Assessment:

Survey Description: Under Development

- When to conduct?

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- Nuances of the survey
- What are the next steps after completing?

Questions: Under Development

Section 8, Self-Sufficiency Matrix:

Survey Description: Under Development

- When to conduct?
- Nuances of the survey
- What are the next steps after completing?

Questions: Under Development

Part 4. Reporting (Part 4 of the Quiz is still in draft form.)

Section 1, General Reporting Questions (4 questions)

1. How do you find a report in HMIS?
    a. Go to "Attendance," then click on "Report"
    b. Go to the launch pad (nine dot, square box to the left of your name), then click on "Reports"

2. What are Report Library reports?
3. When we say "canned reports," we are referring to the reports custom-built in the Data Analysis tab of Reports
4. What are Data Analysis Reports?

Section 2, Report Library Reports *(Under Development)*

Section 2a: Data Quality Reports
Section 2b: Service Based Reports
Section 2c: Program Based Reports
Section 2d: HUD Based Reports

Section 3, Data Analysis (Custom) Reports *(Under Development)*

Part 5. Supervisor Responsibilities of Staff *(Under Development)*

Questions for Supervisors:

1. What do you do to add a new staff person to HMIS?

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2. What do you do when a staff person leaves your agency and should no longer have access to HMIS?
3. How do you get a new Agency added into HMIS?
4. How do you get a new project in HMIS?
5. How do you add/edit/remove services offered by your project/agency?
6. What is the difference between services offered outside a program enrollment vs within a program enrollment?
7. How do you add/edit/remove inventory for your project?
8. If you're made aware of ANY changes to your program that deviate from what was originally reported to the HMIS Team when the program was being built (e.g. funding source changes, project type changes, etc.), what should you do?

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HMIS Staff Access Roles

Access Role	Number of Users per Agency	Required Training	Primary / Additional / Both
Agency Staff - Agency Manager	1 Per Agency*	HMIS New User VI-SPDAT Trainings **(Report Training SOON)**	Primary*
Agency Staff - Program Manager	Limited by Number of Agency's Programs	HMIS New User VI-SPDAT Trainings **(Report Training SOON)**	Both
Agency Staff – Direct Service Staff WITH Assessments	Not Limited	HMIS New User VI-SPDAT Trainings	Both
Agency Staff – Direct Service Staff - NO Assessments	Not Limited	HMIS New User Training	Both
Agency Staff - Services Only	Not Limited	Services Only Training	Primary / Both
Agency Staff - Assessor Only	Not Limited	HMIS New User VI-SPDAT Trainings	Additional Agency Only
Agency Staff - Read Only Rights	Not Limited	HMIS New User Training	Both
Reporting & Monitoring Only	Not Limited	HMIS New User **(Report Training SOON)**	Both

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HMIS Staff Access Roles

Agency Staff - Agency Manager		
ACCESS RIGHTS		
	Restore Deleted Data	Yes
Global Task Bar	History Tab	Yes
	Services Tab	Yes
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	Yes
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	Yes
	Referrals - Dashboard	Yes
	Referrals - Pending	Yes
	Referrals - Community Queue	Yes
	Referrals - Analysis	Yes
	Referrals - Completed	Yes
	Referrals - Denied	Yes
	Referrals - Sent	Yes
	Referrals - Availability	Yes
Launch Pad	Attendance	Yes
	Report Library	Yes
Within Reports Tab	Data Analysis	Yes
	Data Analysis Save	Yes
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	Yes
	Client Reports	Yes
	Agency Sensitive Data	Yes

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	Yes	Yes	NO
Any Client Profile	N/A	Yes	NO
Agency Services	Yes	Yes	Yes
Agency Services Authorization Lock	Yes	Yes	N/A
Agency Programs Placements	Yes	Yes	NO
Agency Program Files	Yes	Yes	NO
Agency Public Alerts and Client Notes	Yes	Yes	Yes
Agency Files	Yes	Yes	Yes
Agency Location	Yes	Yes	Yes
Agency Contacts	Yes	Yes	Yes
Agency Assessment	Yes	Yes	Yes
Agency Referral	Yes	Yes	NO
Unit Availability Reservation	Yes	Yes	Yes

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HMIS Staff Access Roles

Agency Staff -Program Manager		
ACCESS RIGHTS		
	Restore Deleted Data	Yes
Global Task Bar	History Tab	Yes
	Services Tab	Yes
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	Yes
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	Yes
	Referrals - Dashboard	Yes
	Referrals - Pending	Yes
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	Yes
	Referrals - Denied	Yes
	Referrals - Sent	Yes
	Referrals - Availability	Yes
Launch Pad	Attendance	Yes
	Report Library	Yes
Within Reports Tab	Data Analysis	Yes
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	Yes
	Client Reports	Yes
	Agency Sensitive Data	Yes

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	Yes	Yes	NO
Any Client Profile	Yes	Yes	NO
Agency Services	Yes	Yes	Yes
Agency Services Authorization Lock	Yes	Yes	N/A
Agency Programs Placements	Yes	Yes	NO
Agency Program Files	Yes	Yes	NO
Agency Public Alerts and Client Notes	Yes	Yes	Yes
Agency Files	Yes	Yes	Yes
Agency Location	Yes	Yes	Yes
Agency Contacts	Yes	Yes	Yes
Agency Assessment	Yes	Yes	Yes
Agency Referral	Yes	Yes	NO
Unit Availability Reservation	Yes	Yes	Yes

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HMIS Staff Access Roles

Agency Staff - Direct Service Staff WITH Assessments		
ACCESS RIGHTS		
	Restore Deleted Data	Yes
Global Task Bar	History Tab	Yes
	Services Tab	Yes
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	Yes
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	Yes
	Referrals - Dashboard	Yes
	Referrals - Pending	Yes
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	Yes
	Referrals - Denied	Yes
	Referrals - Sent	Yes
	Referrals - Availability	Yes
Launch Pad	Attendance	Yes
	Report Library	Yes
Within Reports Tab	Data Analysis	Yes
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	Yes
	Client Reports	Yes
	Agency Sensitive Data	Yes

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	Yes	Yes	NO
Any Client Profile	Yes	Yes	NO
Agency Services	Yes	Yes	Yes
Agency Services Authorization Lock	Yes	Yes	N/A
Agency Programs Placements	Yes	Yes	NO
Agency Program Files	Yes	Yes	NO
Agency Public Alerts and Client Notes	Yes	Yes	NO
Agency Files	Yes	Yes	NO
Agency Location	Yes	Yes	NO
Agency Contacts	Yes	Yes	NO
Agency Assessment	Yes	Yes	NO
Agency Referral	Yes	Yes	NO
Unit Availability Reservation	Yes	Yes	NO

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HMIS Staff Access Roles

Agency Staff - Direct Service Staff - NO Assessments		
ACCESS RIGHTS		
	Restore Deleted Data	Yes
Global Task Bar	History Tab	Yes
	Services Tab	Yes
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	Yes
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	Yes
	Referrals - Dashboard	Yes
	Referrals - Pending	Yes
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	Yes
	Referrals - Denied	Yes
	Referrals - Sent	Yes
	Referrals - Availability	Yes
Launch Pad	Attendance	Yes
	Report Library	Yes
Within Reports Tab	Data Analysis	Yes
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	Yes
	Client Reports	Yes
	Agency Sensitive Data	Yes

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	Yes	Yes	NO
Any Client Profile	Yes	Yes	NO
Agency Services	Yes	Yes	Yes
Agency Services Authorization Lock	Yes	Yes	N/A
Agency Programs Placements	Yes	Yes	NO
Agency Program Files	Yes	Yes	NO
Agency Public Alerts and Client Notes	Yes	Yes	NO
Agency Files	Yes	Yes	NO
Agency Location	Yes	Yes	NO
Agency Contacts	Yes	Yes	NO
Agency Assessment	NO	NO	NO
Agency Referral	Yes	Yes	NO
Unit Availability Reservation	Yes	Yes	NO

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HMIS Staff Access Roles

Agency Staff - Services Only		
ACCESS RIGHTS		
	Restore Deleted Data	NO
Global Task Bar	History Tab	NO
	Services Tab	Yes
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	NO
	Location Tab	NO
	Contacts Tab	NO
	Assessments Tab	NO
	Caseload Tab	Yes
	Referrals Tab	NO
Within Referral Tab	Refer Directly to Community Queue	NO
	Referrals - Dashboard	NO
	Referrals - Pending	NO
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	NO
	Referrals - Denied	NO
	Referrals - Sent	NO
	Referrals - Availability	NO
Launch Pad	Attendance	Yes
	Report Library	NO
Within Reports Tab	Data Analysis	NO
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	NO
	Client Reports	NO
	Agency Sensitive Data	NO

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	NO	NO	NO
Any Client Profile	NO	NO	NO
Agency Services	Yes	Yes	NO
Agency Services Authorization Lock	NO	NO	N/A
Agency Programs Placements	NO	NO	NO
Agency Program Files	NO	NO	NO
Agency Public Alerts and Client Notes	Yes	Yes	NO
Agency Files	NO	NO	NO
Agency Location	NO	NO	NO
Agency Contacts	NO	NO	NO
Agency Assessment	NO	NO	NO
Agency Referral	NO	NO	NO
Unit Availability Reservation	NO	NO	NO

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HMIS Staff Access Roles

Agency Staff - Assessor Only		
ACCESS RIGHTS		
	Restore Deleted Data	NO
Global Task Bar	History Tab	NO
	Services Tab	NO
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	NO
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	Yes
	Referrals - Dashboard	NO
	Referrals - Pending	NO
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	NO
	Referrals - Denied	NO
	Referrals - Sent	NO
	Referrals - Availability	NO
Launch Pad	Attendance	NO
	Report Library	NO
Within Reports Tab	Data Analysis	NO
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	Yes
	Client Reports	NO
	Agency Sensitive Data	NO

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	Yes	Yes	NO
Any Client Profile	Yes	Yes	NO
Agency Services	NO	NO	NO
Agency Services Authorization Lock	NO	NO	N/A
Agency Programs Placements	NO	NO	NO
Agency Program Files	NO	NO	NO
Agency Public Alerts and Client Notes	Yes	NO	NO
Agency Files	Yes	NO	NO
Agency Location	Yes	Yes	NO
Agency Contacts	Yes	Yes	NO
Agency Assessment	Yes	Yes	NO
Agency Referral	NO	NO	NO
Unit Availability Reservation	NO	NO	NO

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HMIS Staff Access Roles

Read Only Rights		
ACCESS RIGHTS		
	Restore Deleted Data	NO
Global Task Bar	History Tab	Yes
	Services Tab	NO
	Programs Tab	Yes
	Public Alerts and Client Notes Tab	Yes
	Files	Yes
	Location Tab	Yes
	Contacts Tab	Yes
	Assessments Tab	Yes
	Caseload Tab	Yes
	Referrals Tab	Yes
Within Referral Tab	Refer Directly to Community Queue	NO
	Referrals - Dashboard	NO
	Referrals - Pending	Yes
	Referrals - Community Queue	NO
	Referrals - Analysis	NO
	Referrals - Completed	Yes
	Referrals - Denied	Yes
	Referrals - Sent	Yes
	Referrals - Availability	NO
Launch Pad	Attendance	NO
	Report Library	Yes
Within Reports Tab	Data Analysis	Yes
	Data Analysis Save	NO
	Aggregate Data Analysis	NO
Within Clients' Records	Household Management	NO
	Client Reports	Yes
	Agency Sensitive Data	NO

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	NO	NO	NO
Any Client Profile	NO	NO	NO
Agency Services	NO	NO	NO
Agency Services Authorization Lock	NO	NO	N/A
Agency Programs Placements	NO	NO	NO
Agency Program Files	NO	NO	NO
Agency Public Alerts and Client Notes	NO	NO	NO
Agency Files	NO	NO	NO
Agency Location	NO	NO	NO
Agency Contacts	NO	NO	NO
Agency Assessment	NO	NO	NO
Agency Referral	NO	NO	NO
Unit Availability Reservation	NO	NO	NO

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HMIS Staff Access Roles

Reporting & Monitoring Only (Standard & Advanced)			
ACCESS RIGHTS		**Std**	**Advanced**
	Restore Deleted Data	NO	Yes
Global Task Bar	History Tab	Yes	Yes
	Services Tab	NO	Yes
	Programs Tab	Yes	Yes
	Public Alerts and Client Notes Tab	Yes	Yes
	Files	Yes	Yes
	Location Tab	Yes	Yes
	Contacts Tab	Yes	Yes
	Assessments Tab	Yes	Yes
	Caseload Tab	Yes	Yes
	Referrals Tab	Yes	Yes
Within Referral Tab	Refer Directly to Community Queue	NO	NO
	Referrals - Dashboard	Yes	Yes
	Referrals - Pending	Yes	Yes
	Referrals - Community Queue	Yes	Yes
	Referrals - Analysis	Yes	Yes
	Referrals - Completed	Yes	Yes
	Referrals - Denied	Yes	Yes
	Referrals - Sent	Yes	Yes
	Referrals - Availability	Yes	Yes
Launch Pad	Attendance	NO	NO
	Report Library	Yes	Yes
Within Reports Tab	Data Analysis	Yes	Yes
	Data Analysis Save	NO	Yes
	Aggregate Data Analysis	Yes	Yes
Within Clients' Records	Household Management	Yes	Yes
	Client Reports	Yes	Yes
	Agency Sensitive Data	Yes	Yes

Functions	CREATE RIGHTS	EDIT RIGHTS	DELETE RIGHTS
Client Profile	NO	NO	NO
Any Client Profile	NO	NO	NO
Agency Services	NO	NO	NO
Agency Services Authorization Lock	NO	NO	N/A
Agency Programs Placements	NO	NO	NO
Agency Program Files	NO	NO	NO
Agency Public Alerts and Client Notes	NO	NO	NO
Agency Files	NO	NO	NO
Agency Location	NO	NO	NO
Agency Contacts	NO	NO	NO
Agency Assessment	NO	NO	NO
Agency Referral	NO	NO	NO
Unit Availability Reservation	NO	NO	NO

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