CONTRA COSTA HMIS POLICY COMMITTEE

May 18th from 3:00-4:00pm

Join them meeting via WebEx at the following link:
https://teams.microsoft.com/l/meetup-join/19%3ameeting_NjdhY2RiMzYtOGZhYy00MGY0LWIwMTMtYjU5MGU2YWU4MDFk%40thread.v2/0?context=%7b%22Tid%22%3a%222820d9de-dc2d-4363-8626-f2b003438c45%22%2c%22Oid%22%3a%221dc9ea31-8c18-4d62-b195-c909d0a7d1d3%22%7d

or via phone by dialing +1-925-391-1667 US Toll and entering the **Meeting ID:** 533 318 952#

Committee Members: CoC Lead, HMIS Lead, CES Manager, COH Members, Bay Area Community Services (BACS), Berkeley Food and Housing Project (BFHP), Bi Bett, Catholic Charities of the East Bay, Contra Costa Crisis Center 211, Contra Costa Healthcare for the Homeless, Contra Costa Homeless Program (H3), Department of Veterans Affairs, Greater Richmond Interfaith Program (GRIP), Hope Solutions, Housing Consortium of the East Bay, Humanity Way, Hume Center, Lifelong Medical, Northern California Family Center, SHELTER, Inc., STAND!, Trinity Center, Veterans Accession House, Winter Nights Shelter

AGENDA

AGENDA ITEM	PRESENTERS	DESCRIPTION
Welcome & Roll Call	Cassie Hourlland	Identifying & welcoming attendees of the committee.
New Agency Introduction – Housing Consortium of the East Bay	Cassie Hourlland	Welcoming Housing Consortium of the East Bay, a new agency recently onboarded to the CoC and HMIS.
Public Comment	Cassie Hourlland	Open Period for members of the public to comment on items not listed on the agenda.
Agency Updates	Kristina Jackson	HMIS participating agencies can inform attendees of any updates to staffing, programming, operations, or other events. The RED team will also describe HMIS updates in this section if applicable.

Updated HMIS Intake Form Check-in & Additional Updates	Kristina Jackson	Gather feedback or questions regarding the recently updated HMIS intake form. Discuss future changes, including client preferred pronouns and implementing the 2022 HUD data standards.
HMIS Policies & Procedures Check-in	Kimberly Thai	Provide update on new HMIS Policies & Procedures implementation.
Release of Information (ROI) Process Workflow	Kimberly Thai	Review updates to the ROI process for all HMIS participating partners and the proper utilization workflow.
2021 HIC & PIT Submission	Kimberly Thai Kristina Jackson	Review the 2021 submissions for the Point in Time Count (PIT) and the Housing Inventory Count (HIC).
HMIS Training Requests	Tammy Stoicich	Discuss the proper method of requesting new user and custom agency HMIS training appointments.
Q&A	Kristina Jackson	Answer questions related to agenda items covered in the meeting or any other questions related to HMIS data entry or processes.

Next Meeting: June 15th from 3:00-4:00pm

Contra Costa Continuum of Care

HMIS POLICY COMMITTEE

Tuesday, May 18, 2021 from 3:00-4:00

INTRODUCTIONS

Cassie Hourlland, *H3*

NEW AGENCY INTRODUCTION – HOUSING CONSORTIUM OF THE EAST BAY

Cassie Hourlland, *H3*

PUBLIC COMMENT

Cassie Hourlland, *H3*

AGENCY UPDATES

Kristina Jackson, *H3*

UPDATED HMIS INTAKE FORM – CHECK IN & ADDITIONAL UPDATES

Kristina Jackson, *H3*

UPDATED HMIS INTAKE FORM – CHECK-IN & ADDITIONAL UPDATES

- **Recent changes check-in:**
  - Previous Living Situation (all households members)
  - Zip code of last permanent address
  - Feedback/Questions?
- **HUD 2022 Data Standards – October 1, 2021**
  - Race
  - Ethnicity
  - Gender
  - Health Conditions
  - RHY questions
- **Client Preferred Pronouns**

HMIS POLICIES & PROCEDURES - UPDATES

Kimberly Thai, *H3*

HIGHLIGHTS FROM REVISED POLICIES & PROCEDURES

- **HMIS Policy Committee role: Annual review of the P&P's**
- **Partner Agency's role: Develop internal practices**
- **New under HMIS Participation: HMIS Access Application Form (June 2019)**
- **HMIS Termination: Voluntary and Involuntary**
  - **If voluntary:** notify RED Team in writing. All agency information will remain in HMIS upon termination. Any fees paid will not be refunded.
  - **If involuntary** (lack of compliance): The HMIS Lead may implement a Corrective Action Plan. If offense is severe enough, termination of access may be immediate.
- **Annual Site Security Assessment**
- **Training:** After initial training, the AA is responsible for communicating any updated HMIS workflow information to all staff and end users

HIGHLIGHTS FROM REVISED POLICIES & PROCEDURES

- **Non homelessness-related data shall not be inputted in HMIS**
- **Release of Information procedures (see next slide)**
- **Client revocation of consent**
  - New form developed Sept. 2020.
  - Should be submitted to RED Team.
  - Specific PII can be removed but de-identified information will remain in HMIS
- **Client Complaint Process**
  - CoC Complaint form should be used if agency is unable to resolve complaint internally, or if client believes filing a complaint through the Partner Agency is inappropriate.
  - CoC Lead agency will review the form and the need for further action.

RELEASE OF INFORMATION (ROI) PROCESS WORKFLOW

Kimberly Thai, *H3*

RELEASE OF INFORMATION (ROI) PROCESS WORKFLOW

Contra Costa HMIS

Collecting and Entering the HMIS Release of Information

Step 1: On or before program enrollment, check to see if client has a valid ROI in HMIS (an ROI is valid for 10 years). If yes, no need to obtain a new ROI.

RELEASE OF INFORMATION (ROI) PROCESS WORKFLOW

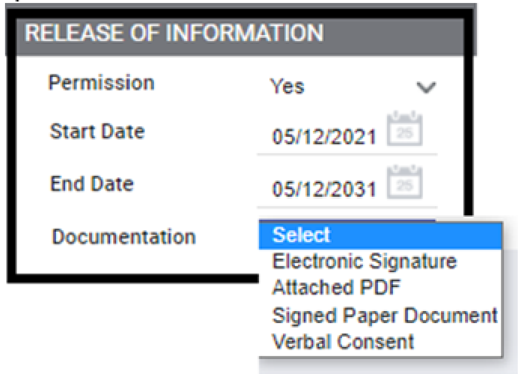
Step 2: If client does **not** have a valid ROI, please read the privacy script and obtain a signed ROI. If client has some hesitancy, please discuss the benefits of signing the ROI (separate doc available). Also explain that not signir may limit the provider's ability to coordinate their care with other agencies.

Step 3: Enter the information in HMIS as follows:

If Yes to Sharing *Client has no concerns and is allowing information to be shared within HMIS*

New Client Record

1. Upon creating a new client record, on the upper right of the screen there will be questions related to the ROI:



- Permission = Yes
- Start Date = date of signature
- End Date = 10 years from start
- Documentation = select appropriate response

2. Save the record and apply the same steps to any children in the household

Existing Client Record

This assumes that the client exists in the database but does not have a valid ROI.

1. Find the client record and click on the shield icon on the top right corner.

2. Click **"Add Release of Information"**
   -Permission = Yes
   -Start Date = date of signature
   -End Date = 10 years from start
   -Documentation = select appropriate response
3. Save the record.
4. If the record is set to Private, please mark as Public

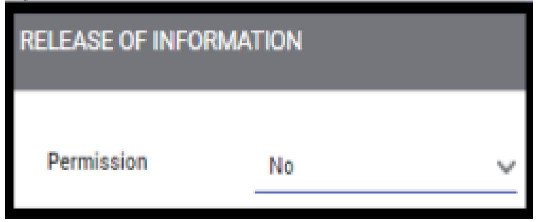
5. Click Save Changes.

RELEASE OF INFORMATION (ROI) PROCESS WORKFLOW

If No to Sharing *Client has concerns about sharing their information within HMIS.*

New Client Record

1. Upon creating a new client record, on the upper right of the screen there will be questions related to the ROI:



- Set Permission = No

2. Save the record.
1. In the client profile, click on the shield icon on the top right corner

3. Set Client Privacy = Private

4. Save Changes.
5. Apply the same 4 steps above to any children in the household.

Existing Client Record

The client exists in the database but does not have a valid ROI.

2. Find the client record and click on the shield icon on the top right corner

2. Click **"Add Release of Information"**
3. Set Permission = No and click Save
4. Set Client Privacy = Private

5. Click Save Changes.
6. Apply the same 4 steps above to any children in the household.

RELEASE OF INFORMATION (ROI) PROCESS WORKFLOW

- *** If only verbal consent was obtained,** please obtain a signed form at next contact. Several attempts may be needed
- *** If client refused consent,** please make one additional attempt within 6 months to obtain consent.
- *** If you operate a phone-based program,** please try to obtain verbal consent from every client.
  - If you missed the opportunity, follow the steps for "If No to Sharing" above.
  - Upon entry into services, have staff obtain a signed ROI and unlock the client record (the steps outlined in "If Yes to Sharing").

2021 HIC & PIT SUBMISSION

Kimberly Thai, *H3*

Kristina Jackson, *H3*

HMIS TRAINING REQUESTS

Tammy Stoicich, *H3*

Q&A

Kristina Jackson, *H3*

ADJOURN

- **Next Meeting:** Tuesday, June 15th from 3:00-4:00pm