

## HMIS Webinar – Transcript – 12-15-21

MARY SCHWARTZ: Hey, I'm looking at our participant number and just watching that tick up, quickly, which is great. Just a few more minutes, and we will get started.

MARY SCHWARTZ: Okay, we've hit the number that I like to see. So, let's see go ahead. So welcome again, this is the HMIS lead webinar we are happy to have you here. You are either an HMIS lead or an HMIS system admin., you are a CoC representative, maybe tied into the data concerns of your community, you maybe have been asked to attend this call by someone in your CoC or HMIS team. And that's great and we welcome you. We're going to this generally, this session covers, HUD updates we do deep dive into content that is very specific to our HMIS world. So. Yes, if you are in the wrong place accidentally, it'll be a very deep conversation that may not pertain to you.

MARY SCHWARTZ: So, our website, our webinars are public facing now and anyone could click the link, but we're hoping that you're here and excited to go through this with us.

MARY SCHWARTZ: So, just a few reminders, housekeeping type things, you're muted you won't be unmuted throughout this. Only the panelists will be talking. We use the Webex Q&A features. If there's anything that is something that you have a question about, or need clarification on while we're talking, please use the Q&A feature to do that. Use slide numbers. If you can, because sometimes we get a lot of questions, and we have to, you know, kind of it takes a little while to get back to everything. So, make sure we know what you're referencing when your question comes in.

MARY SCHWARTZ: If you get asked to enter your question into the HMIS AAQ which may happen does sometimes happen, especially for questions that are, like, really specific to your community, or require a little bit extra response time, that is on the HUD exchange. There's we'll give you the link to the AAQ submission on the HUD exchange also on the HUD exchange is all materials from our past, webinars as well, as within a couple of weeks, this webinar will go live. The recording, the transcript, the slide deck and all Q&As.

MARY SCHWARTZ: Yeah, we are excited to have you here and let's get started.

MARY SCHWARTZ: Going do some quick introductions. Lots of folks on the call today. First and foremost is always Fran Ledger from the SNAPs office, pronouns she/they. Meredith Alspaugh from the Partnership Center, pronouns she/her. Genelle is here from Abt Associates, she/her pronouns. Jenny Hernandez from the Partnership Center, she/her pronouns. Jesse from Abt Associates, he/him pronouns. Sean Morris is a new name you might not have seen yet and he's here from Abt Associates, he/him pronouns. Brian Roccapriore from Cloudburst, He/him pronouns. I'm Mary Schwartz from Abt associates, She/her pronouns. And Kayla is in the background, helping us with technical issues on this presentation from Abt associates, she/her pronouns.

MARY SCHWARTZ: Today we're going to talk about comparable databases, of course, because that's always at the top of our list, reporting timelines. We'll have some LSA updates on those timelines as well as later in the deeper dive. Brian's gonna give you a quick overview of the upcoming data analytics course. We have just a reminder NHSDC is coming and then, as we get into the deep dive of the content today. We're going to talk about some recent updates to the standards, some CE ARP updates. Jesse and Sean are going to walk through LSA stuff specifically. Sean's gonna take you through the HDX 2.0 walkthrough. Jesse is going to go over data submission guides.

MARY SCHWARTZ: We will end today with a feedback session. So stick around at the end, so that you can provide us some input into this webinar. How it went this year? What suggestions you have for the upcoming year / years' worth of HMIS webinars. So, let's start with Fran, take it away.

MARY SCHWARTZ: And you may be on mute Fran. You may not even be hearing me, Fran. I wonder. Okay.

MARY SCHWARTZ: Fran, going to chat with us if you have some technical issues in the meantime. Oh, she's frozen. Okay

MARY SCHWARTZ: We have been going over comparable databases for a while now, on each of these calls to continue to remind you of the CoC and VSP responsibilities when it comes to ensuring the use of a compliant comparable database and those are the CFR references from which this comes. The VSP recipients must use a compliant comparable database or be at risk of a HUD field office finding your local findings. So just a reminder, HUD, there is no vendor or recipient that is percent compliant 100 percent of the time. So, the reason that we're bringing this up and talking this through with you is just to remind you the resources that are out there to help you navigate this world of compliance with VSPs.

MARY SCHWARTZ: There's lots of technical assistance available regarding this topic. We want you to put in an AAQ or a request for technical assistance if there is something you're grappling with locally regarding the responsibilities of the VSP versus the CoC and HMIS lead. We want you to access those guidance materials if you're having questions about, who it should not be considered VSP or who should, and should not be using the HMIS locally. Those are what those resources are meant to do with. It helps to define kind of a decision tree and then the comparable database manual and checklist gives you some tools to walk through and kind of check your own compliance and the VSPs compliance in terms of comparable databases.

MARY SCHWARTZ: We notice too that we haven't specifically said this in the past, but we want to make sure that it's clear that the VSP admins you know, there will be a system admin equivalent, an HMIS lead, if you will equivalent at the VSP. Somebody who is kind of charged with the contract, holding the contract with their vendor, whoever they have that provides comparable databases to their VSP.

MARY SCHWARTZ: Those technical folks would be welcome to join this call. We would love to be able to share those reminders and often all of the stuff that we share with each HMIS leads on this call we want to share that with VSP admins that they're out there. So, make sure to extend that invitation.

MARY SCHWARTZ: I saw this slide just changed on me. Let me double check with my friends and see if there is an update, or should I keep going.

MARY SCHWARTZ: Fran going to jump back on, or shall I keep going?

BRIAN ROCCAPRIORE: I think you're gonna keep going.

MARY SCHWARTZ: Okay, should I take off my camera? Do we care.

BRIAN ROCCAPRIORE: I think you're good to keep going.

MARY SCHWARTZ: Okay. Thanks, Brian. Okay, so there are exceptions. So, VSPs are welcome to join this call. There are exceptions that are being granted as COCs and VSPs grapple with this issue, right? So, if you need an exception to a reporting requirement, or some sort of reason that you are struggling locally, you can submit for an exception via the AAQs.

MARY SCHWARTZ: We had a recent issue, come up where we kind of wrap up with this a little bit ourselves. So, just so, you know, where we landed there is a section in the HIC notice around these responsibilities. We've been defining them for you as HMIS leads for a while. Now, on this call, and on the HIC notice, you'll see that CoCs, the partnership with HMIS leads like, the, the knowledge of whether VSPs are using comparable databases or not, is of the things that you're gonna be asked to know as you fill out the HIC.

MARY SCHWARTZ: There is a difference between federally versus non federally funded, VSPs, in so much as if it is a non, federally funded VSP, that is a universe of VSPs that are kind of outside this realm of, they're, they're in the CoC, there's responsibility to, like, be inclusive of all of the people providing or the organizations providing housing assistance in your communities. So that's like the larger responsibility for the HIC. But, in terms of digging in on whether there's comparable data, whether they're using a comparable database, whether it's compliant or not all of that is for federally funded VSPs and not necessarily a non, federally funded VSPs.

MARY SCHWARTZ: So, somebody in this very smart group of people. You guys came up with that question and distinction, so definitely seek clarification if you're looking at the HIC notice and grappling with like, what really do I need to know about VSPs in my community. Anyone else feel free to jump in here if they want to clarify or help me out.

MARY SCHWARTZ: One of the other questions we've got is if we are a CoC that has been grappling again with this issue locally for a while and we know that the VSP, the federally funded VSP is on a comparable database, but that comparable database isn't necessarily compliant with all HUD standards. Can we count them as compliant for this year? As if transition plans are already in place, and the conversations are already started, you know, can we kind of like get credit for being in the conversation even though they haven't quite made the switch? or the transition over to a compliance comparable database? But they're on a comparable database that we're having the conversations. That answer, yes. So definitely give yourself that credit there. If you're kind of in the middle of a transition, you know, there's going to be a brighter picture on the other end of the transition.

MARY SCHWARTZ: That is a fair thing to say, you know, we're in compliance generally and we're, we're moving towards fuller compliance.

BRIAN ROCCAPRIORE: I believe Fran may be back on. Fran are you with us?

BRIAN ROCCAPRIORE: Hearing nothing. I did want to touch on the exceptions that you were talking about.

MARY SCHWARTZ: Yeah.

BRIAN ROCCAPRIORE: Some of that was the exception when anvESP would go to submit their CAPER, their APR, what have you, and they weren't able to produce the CSV format. Typically, they would just get a blanket exemption for that. And that is a process that is going to change. There's no not going to

be any more blanket exceptions made for those situations. Not that exceptions won't be made, but that there will have to be a plan associated with that exception. So, they will have to have a plan to get to the place where they will be on a compliance system going forward.

MARY SCHWARTZ: Great. Thanks for the clarification, Brian.

MARY SCHWARTZ: All right. I think the next slide is yours. I will move it for you. Nope it's not just kidding.

MARY SCHWARTZ: Reporting timelines. So, let's go over a system performance measures. We're live. We're live. Get your system performance metrics in last I looked it was about 87 percent, submission, no not submitted. Right? 87 percent of you haven't started your system performance measures you have until February 2022, but don't wait till the last minute. It's always very hard to help people with problems that they might encounter, and they might encounter something that needs to fix on our side. So, the sooner you get it in the better chance you have a meeting that deadline. The LSA is open, we are live in the middle of LSA, and we anticipate that it'll close.

MARY SCHWARTZ: Excuse me, February 15th, 2022. We have deeper dives into that timeline and what's happening through all that, on past webinars. And maybe Jesse's going to remind folks of what's going on with LSA timeline wise up to that February 15<sup>th</sup>, date. The housing inventory account count, point in time count is tentatively open for data for reporting March 20202. So that's going into HDX and reporting your PIT and HIC will happen generally along the same timeline as last year. The point in time count webinar, we know the office hours to go and get your questions answered about the point in time count this year is right after this call. So go to the HUD exchange, use any number of the links that we provide through the Q&A to go and grab the point in time count.

MARY SCHWARTZ: Details to go log into that office hours, if you have specific point in time count questions today, now's the time .

MARY SCHWARTZ: Jesse invented a new word, and I really like it. So, I'm using it forever now for the rest of my life stellavization, which is the process of stellavizing your data sets after the LSA submission is past its prime, right? The initial uploads are done mid-January 2022. We anticipate that Stellavization could happen soon. Any question? Now it's Brian, turn.

BRIAN ROCCAPRIORE: Thank you. Mary so the data analytics courses back for round number three. We've talked about this a few times in the past and just for the new folks to hear the course, it's in online self-paced course, that is designed to provide a framework for ad hoc reporting that uses HMIS data, not necessarily designed for HMIS leads, but really anybody in your community that wants to work with data to start to be able to tell a story with that data. It consists of videos, demonstrations, interactive exercises and data challenges. For the purpose of increasing the CoCs capacity to use data. This next cohort is going to be at the end of January, it's going to start with an announcement made via the HUD exchange to sign up in mid-January. We have been able to increase the number from 200 folks to 250 folks. And there has been somewhat of a high demand for this in the past. It has traditionally filled up within the first 30 minutes of it being announced.

BRIAN ROCCAPRIORE: So, this time around I know in the past, there have been some mistakes made as to when that announcement went out, I think it was 8am East Coast time. So that is going to be changed for this time around. So, it will be a fair time frame for all folks who want to access the course. So, you

can keep an eye to the official HUD exchange emails going out in mid-January for that one. And Mary itsbelieve I'm back to you.

MES: Okay, I'm just going to go over this one slide, and then hand it over to Meredith, and I will get to the questions that are coming up in my inbox.

MARY SCHWARTZ: So, version 1.3 of the manual will be posted soon, both the interactive data standards tool and the PDF manual. The change is fairly straight forward and let me give you a little history as to what prompted it. Community asked us if you make a referral to safe haven this is data element 4.20, in the list of referrals responses, 10 – 17 now, safe haven isn't specifically called out. Neither is day shelter, neither is, you know, some other project types. I believe.

MARY SCHWARTZ: What you're goanna want to do in that situation, where you have a referral to record in HMIS, but doesn't match specifically the list of referrals made that are available in HMIS. You, A: can locally with the CoCs authority, right? The oversight that HUD hands to CoCs through the program in, or rule make some of those calls yourself. You can also submit an AAQ, and see what HUD would say in that situation. In this particular case, safe havens are, which are very clearly defined, there's a specific fund source to be a safe haven and it's a very small number in this country. But safe havens are usually grouped in reporting with when we have to kind of consolidate project types for reporting purposes, we would group those under emergency shelter and that's fairly straight forward.

MARY SCHWARTZ: So, HUDs answer in this case, somebody said, where would I put a referral to safe haven in the list of the CE data element for 42.0 referrals? So, the answer is A, your communities capable and allowed to make some of these decisions yourself and our opinion would be safe haven, wouldn't we be paired with emergency shelter.

MARY SCHWARTZ: In looking at that, the manual specifically stated a set of project types that would be applicable. If your HMIS vendor was going to free program and dropdown list for dependent C location of crisis, housing or permanent housing referral. And follow those instructions, it wouldn't have safe haven in that list. Right? And it wouldn't have day shelter in that list. It wouldn't have project types that aren't included specifically in the referrals that are listed in 420. So, we removed that restriction, really. Just to make it really clear that CoCs are in charge of just determining this referral. Generally, if you have a safe haven in your community, and are making referrals to it for a coordinated entry, HUD, would say, put that under emergency shelter. That makes sense. And your location of crisis, housing, permanent housing referrals shouldn't be limited by everything, but safe haven or a shelter, or whatever. The example is that you're using.

MARY SCHWARTZ: Clear as mud I'm sure but that is the very minute change that was made for version 1.3. Nothing changed in, like, data element, data collection or instructions or anything like that.

MARY SCHWARTZ: So, the other thing that created a 1.3 of CSV is nobody has got this up to this point, but there is a data element in HMIS in theory could be collected and stored in and didn't have specific export specifications around that response. So it's in V8, which is only required of VASH OTH Projects now called continuum projects, I believe, and there's only, I think last I heard or touched base with, there's only three in the country that would be using this data element maybe. But if they were to select other and fill in another response, that wouldn't have gone anywhere in the CSV. But now it will, it would show up in services dot CSV.

MARY SCHWARTZ: Meredith, please correct or add to if I got any of that incorrect, but it is now your turn.

MERADITH ALSPAUGH: Great, thank you. I have no corrections or updates. That was a great summary. I think so, thank you for doing that.

MERADITH ALSPAUGH: Okay, so let's talk now about the CE APR of which that 4.19 and 4.20 data that we'd love to talk about is very important. So just a couple of reminders here for folks, because we get these questions. All SSO grant recipients are required to use HMIS or comparable database for their coordinated entry projects. So, if your, if you're CoC, you know, if you get that funding from the CoC program, you have to have a project in HMIS or the comparable database project or projects. We'll talk more about that in a second

MERADITH ALSPAUGH: And all program SSO-CE Grant recipients are required to submit the newest version of the CE APR, as of October 1<sup>st</sup>, 2021 . We've had some questions about this. We often get this question after a big data standards update, but regardless of the fiscal year of funding you received, regardless of anything really as of October 1<sup>st</sup> - you must create or submit the newest version of the CE-APR. This newest version of the CE-APR has a CSV upload and this is a CSV upload that is required to be generated out of the HMIS or if VSP than the comparable database just putting a plug out there that the programming specifications really they were released in February of 2020. There were some delays, Covid, et cetera and then so that actually didn't get implemented until October 1,2021. But the specs have been out for quite a while there was an update made in the data standards that necessitated an update in the specs this year and that happened in August or September.

MERADITH ALSPAUGH: But really the reports that have been the same since February of 2020. So, it should be available in your system, whether a, using an HMIS or a comparable database. I want to plug to as a reminder that this report is a system wide report, and it has to be generated on the entire coordinated entry system. So, if you have a victim service provider, that is part of your coordinated entry system. The CE- APR CSV file, how about that for an acronym there, must also be generated by that victim service provider in their comparable database and submitted with the CE-APR. When the recipient of the grant goes to submit their APR on Sage, they will let the recipient upload as many CSV files as is necessary. So, if there are multiple VSPs within a continuum, which we know would be on their own comparable databases, they would each be responsible for providing the CoC with a CSV and coordinated entry CSV generated by their comparable database.

MERADITH ALSPAUGH: So that particular grant recipient would submit three separate uploads with their APR.

MERADITH ALSPAUGH: We get a lot of questions about the project universe for the CE-APR. One that we just got the other day was should our RHY funded projects be included?

MERADITH ALSPAUGH: So, yes, this question of do I include my RHY, PATH, VA, private whoever else? If your CE system is set up, such that there is a single coordinated entry project in your system where all data is recorded that CE-APR is going to be generated on that single project. However, if you have like, a sort of no wrong door approach where you've got this data being collected in your RHY funded street outreach project and in your PATH funded street outreach project and then you're, you know, you've got a VA SSVF project that has got some coordinated entry data elements on it. Wherever those data

elements are in your system, regardless of project types, regardless of funder. If it's if it's part of your coordinated entry system, those projects must be included in the CE-APR CSV.

MERADITH ALSPAUGH: So, vendors have been provided with programming instructions that that define that this should be a system wide report that it should be able to be generated across your entire system, regardless of funder, regardless of project types. If that data elements 4.19 and 4.20 are collected in a project those projects have to be part of the APR universe.

MERADITH ALSPAUGH: So just a reminder on that, and then the last , another common question we get I have a YHDP or DV bonus or other specific focus for my coordinated entry grant, shouldn't I only report on those people? Nope. Always, CE-APR the is a report on the entire system and always, the expectation is that you're going to include CSV files from your entire system that is covered by your coordinated entry.

MERADITH ALSPAUGH: So, if you're a YHDP recipient, and you've been awarded, you know, an SSO- CE grant, for serving youths, that's great. For the purposes of the APR you're gonna get an upload a CSV upload for your entire system to provide the HUD because that is what HUD is interested in knowing. So, in all cases, it is a complete system wide report.

MERADITH ALSPAUGH: I think that's all I had to say about that, Mary.

BRIAN ROCCAPRIORE: Meradith, can I jump in with a couple of questions?

MERADITH ALSPAUGH: Yes.

BRIAN ROCCAPRIORE: Okay there's a couple of questions on what it means to be part of the coordinated entry system? Can you talk about what that means? Is it receiving referrals, doing assessments? What does that mean?

MERADITH ALSPAUGH: Part of the CE meaning that that's where the, it's like an access point for lack of better word. So that's where you're 4.19 and your 4.20 data are being collected. That's where you're the person is entering your system. So that, you know, again, it's like the street outreach or the shelter project, wherever it is that, that is 4.19 or 4.20 of data is being collected.

MERADITH ALSPAUGH: Does that answer that? Sorry I just saw the question.

BRIAN ROCCAPRIORE: I don't know. I think so. So I'll go on to the next one. For the coordinated entry APR, there can be multiple CSVs from a victim service provider, is that also the case for regular programs that are not victim service provider?

MERADITH ALSPAUGH: No, because it would be the report would be generated from your HMIS and which all of your projects are participating. Right like, we're only getting the separate CSV from the VSP CSV because they're in a separate system. Otherwise it is expected that you have a single CSV upload from your HMIS.

BRIAN ROCCAPRIORE: And we got confirmation that your last answer did in fact, answer that question. So thank you for that. One more, they understand that the, CE APR is a system wide report the question

is because the coordinated entry programs are in HMIS with the non coordinated entry programs, are you saying the non coordinated entry programs should get pulled in as well?

MERADITH ALSPAUGH: They don't have to be included. If the programs that the projects are not collecting that data they don't have to be included. And we've told the vendors this, even if those projects are included, if you pick them up in your report. The way that that coordinated entry report works, it's only pulling active clients by whether or not they had an assessment in the date range. So, if you have a project where that data wasn't even collected, they wouldn't get picked up in the universe. Does that make sense? So it's not necessary to include them. They wouldn't be counted anyway.

BRIAN ROCCAPRIORE: Okay one point of clarification that the CE-APR CoC report not a system wide report. That is correct that is at the CoC level. We sometimes use those words interchangeably, and we'll try to clarify that next year, we do that. Question is what does stand for SOS? I know that as Save Our Ship, but that is probably not what we're referring to here.

MERADITH ALSPAUGH: It might have said SSO? I think those are supportive services only grants.

BRIAN ROCCAPRIORE: Okay, that makes a little more sense. Yeah, SSO supportive services only. And follow up if their entry point is a single project, then that would be the only project included in the APR, correct?

MERADITH ALSPAUGH: That's right. Yep.

BRIAN ROCCAPRIORE: Okay. I think we're good with the questions we've gotten right now.

MERADITH ALSPAUGH: Thanks .

MARY SCHWARTZ: I think, okay, I think we're moving on to Jesse.

JESSE JORSTAD: All right Thank you.

JESSE JORSTAD: Okay, so before I get to the LSA I wanted I mentioned the PIT really quick. So the notice came out little clarification here, the gender data collection for the unsheltered pit and the shelter pit should align with the new data standards and the gender response options. So, they'll be reported analogous to how they're being reported for all of these other reports, but they should be collected as outlined in the data standards.

JESSE JORSTAD: Okay. Moving on to LSA. So to talk timeline for a little bit, I guess I should have thrown in the timeline slide here one more time. So we'll just, we'll just imagine it in our minds that great graphic. So liaisons started reaching out yesterday, so you should be hearing from them as soon if you haven't heard from them yet. We are hoping Coc's that will have a successful upload by 12/20 .That does not mean that they've necessarily been submitted, that's just you've gotten through the upload phase. You've got a successful file up there and that's just so that way data cleaning can start in earnest an we're just trying to kind of keep everybody on the same page there.

JESSE JORSTAD: So there will be a winter break that happens between 12/23 and 1/3 during that time liaisons won't be responding to emails. And then we anticipate that the data cleaning cycle will wrap up on February 15th of 2022 .We do have some new guidance out and available for your reference. The



first document is this guidance on common data quality issues. So, it goes through and talks about issues that are related to the project descriptor data, which is many of them. Many of the issues are caused by setup problems so it walks through what could be causing some of those problems and talks about how to resolve the issues. And then it also talks about people in household data, and some of the common issues that are tripping folks up there as well. So, hopefully you find that to be helpful.

JESSE JORSTAD: The next is one, there has been an update to the introductory guide to submitting the LSA data for AHAR. So this is going to walk you through what Sean's going to go over here in one moment., which has to do with your, you know, setting up and managing. He probably won't talk about that specifically but that's in the guide if you need it, but then the overview of the submission cycle and process, the different pages that exists within HDX 2.0 and what they do and how to navigate them. And then what kind of support is available to help you through this process.

JESSE JORSTAD: So you can find that at the link here.

JESSE JORSTAD: Last thing I want to talk about, I'm pretty excited, staff have developed what we're, what we're calling the LSA common flags library. So, the idea here is that we took, I think the top most like, common flags and created kind of a directory that you can use to look it up. It provides the flag ID. It gives a plain language description of the flags, talks about the possible causes that could be triggering those flags. Gives you resources that are related to the data around it, and how to resolve those things and guidance on what information data liaisons would need from you in order to resolve warnings.

JESSE JORSTAD: So, sometimes a warning is coming up and the data are accurate and we wanted to give some advice about, like, how to relay that in a way that can go ahead and kind of resolve that issue if you will..

JESSE JORSTAD: Okay, so I am going to go ahead and turn it over to Sean.

JESSE JORSTAD: All right over to you.

SEAN MORRIS: Great. Thanks, Jesse.

SEAN MORRIS: So, we'll just advance the slide here. Hi, everybody, I'm Sean Morris. I'm with Abt Associates. I'm an associate and this is my foray back into AHAR. I was with AHAR from 2011 to 2016 , took a little break to go to graduate school. And now I'm back. So excited to be here. I just wanted to talk about the data submission workflow, which is covered in the LSA submission guide. But this is a little bit more depth than we're going to follow this up with a walkthrough.

SEAN MORRIS: So, I think of the LSA submission as being a tennis game between you, the submitter and us, is the liaison and the HDX review team, where the ultimate point is for you to win that tennis game. So there's a couple of games within it. The first is this cycle. That's the, the format check.

SEAN MORRIS: So, you'll notice in the upper left-hand corner, you'll be submitting your upload. And the st thing that happens is that the data run through a format and upload error check. If it's not successful as some of you might have experienced already. You'll get a report back that explains just exactly why the upload wasn't successful the whole point of the initial upload phase, which is the phase that ends on next Monday is for you to just try to upload successfully an official HUD review file.

SEAN MORRIS: So, the big point of that phase is so that you could get in touch with your vendor and try to iron out any issues, if there are issues on your vendor side. If there are issues, if your vendor comes back and says the issues are actually on our side, and HDX, then we welcome you to submit and ask AAQ question ticket, which I will look at personally, to try to address.

SEAN MORRIS: So if you were able to successfully pass the format, upload an error check. Your data will then move to in processing so every dataset has a dataset status and you can see those in the boxes that follow that they start with in processing. And then it will move to need CoC review as soon as the data are processed for warnings. So, if you were around last year, you'll know that there were basically spreadsheets that were handed back and forth between you and us. This year we're doing away with the spreadsheet, but we've had to keep an antiquated part of the process, which is uploading warnings through our own system, so that we can get them into HDX.

SEAN MORRIS: So you'll, you'll see that your data set will be in processing until it's run through for warnings. And then as soon as the warnings are uploaded, the status will be changed to need CoC review. One quick note is that we're experiencing some technical issues with the warnings right now, so you'll you won't be able to submit your upload for review.

SEAN MORRIS: so right now all of the data sets are in processing and won't be won't move to CoC need review until the warnings are uploaded. So that might that might take us a little bit more time to troubleshoot. So, once things are in need CoC review, you'll then be able to go through all your warnings and leave notes for them. And then you'll, you'll be able to submit for our review. So, that's when we would take a look and would give you some feedback. So, once you submit, then, we will take a look and if we need if we need any more information from you, if some of warnings are addressed with notes that are considered insufficient by our team, then we'll move the status back to needs CoC review and we'll keep the cycle going.

SEAN MORRIS: So right now, because all of the data are in processing, we're, we're hoping that you can spend most of your time, just troubleshooting your errors, because almost all are CoCs experiencing errors as we see them now. So, that's something that you can readily you can readily move along with without our assistance with the warnings. So, that kind of completes us through the work flow. The ultimate goal of that being for you to submit and for us to mark, the review is complete. So then within the submission, I'll move to the next slide. Every warning will have its own status also. So you'll see, it's of these six statuses and this is also another tennis game. So, by default, any one warning will show up with a warning flag status of note required. As soon as you leave a note in the system, the status will change to review required by liaison note has changed. So that essentially is assuming that whenever you leave a not then it's the ball kind of changes to be in our court so that we're, we're going to take a look and get back to you about whether or not that's sufficient.

SEAN MORRIS: If the note is sufficient, then we'll mark it to of these green categories we're expecting only to use the CoC unable to address issue in on a very small number of cases. So, otherwise we're hoping that we will get ultimately a full review back to you that has green warning flag statuses, but if there's if they're not sufficient, then we'll move it back to additional information requests from CoC. One of these orange categories

SEAN MORRIS: So, let me now take you on a tour into HDX so that we can look at these processes in a little bit more depth.

SEAN MORRIS: So, I'm now sharing my screen.

SEAN MORRIS: Okay. So, when you're in LSA, you'll go to the LSA tab and the first thing that you'll do is going to upload new and you'll fill out the information here. That I remember again that the main goal of the initial upload phase, which ends on the 20th is to upload an official HUD review file that's the only file that you'll be able to submit for our review when the submission is actually open.

SEAN MORRIS: So, you'll browse to find the file you'll enter in this, your CoC name, and any other information that you want to enter and then you'll hit upload and that's when it'll be checked through the data and format check. If it's it, it might take a minute or two to run but you'll immediately see either the, the failed upload with an upload error report or you'll see that the upload was successful.

SEAN MORRIS: When the upload is successful, you'll be able to access the information here. This is some test data that we're looking at, so no issue with privacy or anything like that and you'll see that there's both warnings and errors in the system. Right now this dataset isn't processing. So normally you wouldn't see warnings in an in processing dataset or they may be old warnings, but you'll be notified that in in the modular window.

SEAN MORRIS: So, you see both errors and warnings in this errors and warnings view. And what I like to do is come through and to searched just for warnings, which then gives you the ability to go through each of your warnings one by one to validate them by leaving notes. So as I mentioned before, you can start by cleaning your data just by addressing the errors. So, you can click on every one error to get some more information about it. And this is what we call the modular view of the errors and warnings. So, you can go through each of those and start to clean your errors, even without feedback from us, but once the warnings are uploaded then you can just sort through those and come through and then you can leave a note with that our team will review.

SEAN MORRIS: And as soon as you do leave a note, as you can see here, the status changes automatically to, so I'll leave a test note here, It save, and then that test note gets updated. And as soon as I X out, you see, the status automatically changes to review required, by liaison note has changed. So what we ask you for is for a notice that that's as comprehensive as possible. It's really great, if when you leave a note, your note, your latest note is always the most comprehensive notes. So don't hesitate to copy what you wrote in a previous note, and then paste it back in here with any additional information, then we don't have to go through the entire thread to be able to see what the most up to date information is.

SEAN MORRIS: That's a favor that you'd be doing to your liaison.

SEAN MORRIS: So, another feature that I want to outline is that it's possible to bulk update notes so you can check all these boxes and then you can leave a note on multiple records. That's note, and you can update those as well and when that happens, you can see that these also get changed. So that can be very useful when you've got the same kind of warning multiple times. So you might have wanted to do it on these four warnings, but that's another thing that we recommend to save yourself a lot of time. It's also possible to see more than set of, more than just ten entries which can make your life a lot easier.

SEAN MORRIS: So, that wraps up the tour of HDX. Now I'll stop sharing and we can ask some questions before I hand it over to Mary.

MARY SCHWARTZ: Thanks, Sean. I'm not seeing any of the LSA questions, but Brian, Jessie, Genelle, anything to bring up?

JESSE JORSTAD: Probably. There is a lot of questions. Okay. Give me a second here. Okay, so of them is, is there a wait time before the errors are available? Are they available immediately upon upload?

SEAN MORRIS: The errors will be immediately available. I think there might sometimes be a couple minutes while they're uploading, but you'll get a message about that in the system. So wait, just maybe 5 or 10 minutes, and they should be there immediately.

JS: I do just want to clarify more time that we're not looking for you have submitted by 12/20, we're looking for a successful upload by 12/20. What happens if you don't get a successful upload by 12/20? We don't like, come after you. This is just to try to, like, keep everybody kind of in sync and to make sure that we don't find out on the 20th of January that you don't have a successful upload yet. Right? So, we are looking for an indication that you are planning on participating in the LSA, and we want to make sure that if there is a problem with that upload, that people are aware of it ahead of time and that there's still enough time to resolve that.

JESSE JORSTAD: And unlike last year, there actually isn't the function needed to submit it, each time. Rather you won't actually have to submit it until the data are cleaned and you're, like, formally submitting it and you're all wrapped up with your data cleaning. Is that accurate? Sean?

SEAN MORRIS: Yes.

JESSE JORSTAD: Right. I think those are the main ones. If you have questions about specific flags, it's really probably not great for us to try to answer them during this call and you should probably follow up with your data liaison instead so that they can give you that one on one attention.

JESSE JORSTAD: Okay. I, I might hop back up at the end of the call to answer a few more questions live.

BRIAN ROCCAPRIORE: Jesse while we're here, there was a couple of questions about if it's not going to be in a spreadsheet. What format is it going to be in? Can you address that one for everybody?

JESSE JORSTAD: Yes, so as I believe it was part of sean's demo, although I wasn't watching cause I was answering questions. There is an interface in HDX that provides all of the errors and warnings that interfaces exportable if you need to have it be somewhere else, but we don't have a need for you to export it. You can add all of your notes inside of HDX.

SEAN MORRIS: And you will only be able to leave notes on warnings.

JESSE JORSTAD: Correct.

SEAN MORRIS: So I'm seeing Genelle question. Someone asks why they can't add notes and it's likely because they don't have any warnings yet. That's correct. You won't be able to add any notes into the system yet, because there are no warnings in the system and that's it because of a technical issue that we're ironing out now.

JESSE JORSTAD: Well, here's a good question. If they can only upload one official file, how will we see if things that we've done have fixed the errors? Can we run our export again and upload additional local only to review our data? Sean, do you have the specifics on if you are essentially replacing your official upload, because like- So you've, you've submitted an official file, you've got your errors and warnings you've done some clean up, you want to submit again. That just is there actually, like, a mechanism where you're actually just replacing the official file. Is that how that works?

SEAN MORRIS: Right. So you can replace the official file if you wanted more information about the errors and warnings that are coming up, what I recommend is that you take your own inventory. Because we have this export flags button that you can see in the interface. So you can export your flags, re-upload because you have to replace your upload. And then you can export your flags again to see, what's what.

JESSE JORSTAD: That makes sense. Great

JESSE JORSTAD: If you haven't heard from your liaison yet. You should expect to hear from them I, I would certainly say by tomorrow. So, they do have quite a lot of communities that they're getting in touch with, but I think the goal was the end of the day today.

SEAN MORRIS: And otherwise make sure that your contact information is up to date in HDX and because they're, that's how they're reaching out to you is based on the contact information in HDX currently.

MARY SCHWARTZ: Cool. Jesse back to this document. Has this been updated since November 2021? The picture there says last updated November 2021. Or is this?

JESSE JORSTAD: That is the current version, so right I think it was published, like, in the very last day of November 2021.

MARY SCHWARTZ: So, that was the question was whether there was updates to that, but no, that's the live, November 2021. Okay, moving right along.

JESSE JORSTAD: Yeah. Mm. Hmm.

SEAN MORRIS: Yeah.

MARY SCHWARTZ: Thank you. Sean. Happy to have you here, we always love new faces and voices on this. call's great. Thanks for all that hard work on HDX.

MARY SCHWARTZ: Okay, so we are going to it's, we've got good timing here you might even get a break before you head over to that webinar at 2:30 Eastern. But we want to spend some good, quiet time in a feedback session. So I want to set up the framework for this, before we dive in. So, we're going to ask you for open ended specific questions to gather information as we plan for next year's webinars. We really want these webinars to be responsive to your needs. So, we kind of scoured AAQs and looked back at our last presentations and thought about the year and kind of targeted, some specific areas that we want your feedback on.

MARY SCHWARTZ: We are going to for the first time especially since we moved to this Webex platform. So, we're not quite sure how it's going to go, but we're excited. We're going to open up the chat feature

for you to provide feedback on these four questions that we're going to ask you. So I want everybody to, like, take a deep breath and get in the mind space of being contemplative and providing us some critical feedback and suggestions for going forward to these specific questions. We're going to ask that you please send your responses to all panelists only. So if you accidentally on the chat feature, when it opens up, if you respond in the two section to everyone, that is not something that we'll see. And we also would like you not to do that.

MARY SCHWARTZ: So, don't do to everyone, send your chats to all panelists only. We'll give you about 3 minutes with each question. And oh, somebody is letting us know that the PIT call does start at two, cool. Okay, we're going to go fast here. I really want feedback on all 4 of these that means two minutes per question, will end with our joke and get on our way to the PIT call. Are you ready? Please start the chat with all panelists.

What can we do better to support you with your areas of concern specifically?

MARY SCHWARTZ: Some examples might be local coordination vendor, relationships, guidance and incongruencies and confusion, data standards input, new topics, content suggestions. Any ideas are welcome, we really want to hear what we can do better to support you with any areas of concern that you may have locally. How could this webinar better support you?

MARY SCHWARTZ: I'm watching the clock.

MARY SCHWARTZ: Great feedback folks.

MARY SCHWARTZ: Love this.

MARY SCHWARTZ: Okay, 30 seconds and then we're switching to question and some of you caught on doing a little number, or number one or number two or number three or number four, depending on what question your answering would really help us out.

BRIAN ROCCAPRIORE: Just a reminder also to use the chat box, not the Q&A box or their responses, so they can all be in that same spot.

MARY SCHWARTZ: Okay question number 2, moving on. What can we do to improve webinar logistics, specifically? Some examples the structure of it it's weird. The format isn't right the length and pace are wrong. The accessibility isn't there? New ideas technologies format, for improvement are welcome. So, question two: What can we do to improve webinar logistics? And please remember to state all panelists.

MARY SCHWARTZ: That's great. Okay 30 seconds and counting, get your get your question two in there.

MARY SCHWARTZ: Virtual reality, what a great idea. Reach out and shake hands finally.

MARY SCHWARTZ: Here we go question three. How can we improve speaker presenter facilitator roles specifically? Some examples knowledge presentation, skills, time management, better jokes whatever feedback you have for us as your technical assistance providers, assigned to this task. Anything that we can use to improve from your opinion would be helpful. And I'm looking at time and I want to make sure that folks can jump off in time for the PIT webinar. If it does, in fact, start at two.

MARY SCHWARTZ: Okay, and four is really, actually, is pretty straightforward. Any old other thing you want to tell us that we didn't ask for already please do, and ongoing feedback is welcome if you want to just enter in with an HMIS AAQ title like webinar feedback or HMIS lead webinar feedback. We will take it there as well in an ongoing way. Never be shy of providing us your feedback, we really appreciate it and try to take it into account.

MARY SCHWARTZ: So, with that, we have resource links. Couple of newest resources, helping HMIS leads solve complex fund source problems. Something we worked on and talked about in the last presentation the last lead call it actually, became live by the time we talk again. So how about that. Client informed data collection best practices and community examples are there for you, which is just a fantastic resource for anyone looking for examples of what to do. Well, remember that we come back January 19th and we have every month scheduled at this point again pay attention to listserv and the HUD exchange for any notes on if we're canceling a call one month or adding calls as needed, depending on the world, as we know it.

MARY SCHWARTZ: Meredith.

MERADITH ALSPAUGH: Hey, Mary,

MARY SCHWARTZ: What's the quietest game in the world?

MERADITH ALSPAUGH: I don't know what it is.

MARY SCHWARTZ: Bowling, you can hear a pin drop.

MERADITH ALSPAUGH: Oh, there you go. How about that?

MARY SCHWARTZ: All right do you want to add. If not, we are

MERADITH ALSPAUGH: Thanks everyone. I just want to say, thank you also, Mary. Thanks everyone. We really appreciate you all joining the call.

MARY SCHWARTZ: It really means a lot to us to be here and that HUD provided us this opportunity to interact with you directly and yeah, the Meredith, Brian, Jesse, Genelle, Jenny, Sean, Fran of course. Kayla thanks for everything you guys are awesome. We'll see you next calendar year, 2022.