System Admin Webinar 6.26.19

0:00:00 Fran: This Monday the 24th was the LSA deadline. Also I'm going to talk about that for a few minutes, but I just want to say that HUD act and the LSA team and the Stella team are all very aware of the challenges and considerable time communities have taken to submit the LSA and without the LSA and the hard work that everybody's put in, Stella is not possible; and Stella is amazing. And so, we truly appreciate the hard work that everybody has done and we just want to say that, while HUD can't specifically talk about the LSA in relationship to the CoC NOFA, we do understand the challenges the LSA caused and the concerns that communities have. We have seen questions come in here on the system admin call, and we want to let you know that we do keep this in mind when making funding and policy decisions. So I can't say more of about that. It is exciting to see that almost all CoCs submitted their official HUD LSA file on Monday. If you are the one doing the submission, you should have received a notice that said if you had a concern or wanted to confirm your submission, you have until 8:00 PM Eastern tonight to do so. So please make sure to reach out to the AAQ as soon as possible if this applies to you. So if you're already done, you don't have to worry about it, but again, if you had a concern or you wanted to confirm your submission, then you'll need to do that by 8:00 PM Eastern. So, please make sure to reach out... Uh-huh?

0:01:45 Jules: Can I just clarify that a little bit? I just don't want to get AAQs from everybody who want to confirm that their submission was submitted, please upload it, yeah, I just... I don't want 300 AAQs coming in to me. So if you uploaded the file, that you intended to submit and then you clicked submit before the deadline, you're done, you're fine. Don't ask us any follow-up questions, you're all done, don't worry about it, you did it. If you uploaded a file, and didn't click the submit button, it was automatically converted over to submit status on the deadline and again, if that was the file that you intended for us to receive, then you're done.

0:02:27 Jules: If, however, you uploaded a file that you maybe you were trying to upload a different file right at the end there, or you weren't able to switch the file that you were actually working on from local to official submission and we converted the wrong file from in process to submitted status, that's why you would want to write in and ask us to reopen your submission, and you have until 8:00 PM today to finalize that. We just... Since we automated the submissions process for those folks who were still in progress, we just want to make sure that you're comfortable with us taking that particular file and using it as your official submission. So if you had any issue uploading at the last minute, or anything, and the file that is in submitted status for you as your official HUD submission is the wrong one, that's why you would need to open an AAQ, and we can set that back to in progress for you. Thanks.

0:03:32 Fran: Thanks Jules. So, just to close on the LSA, I want to again thank you for all of your hard work. And HUD is committed to making this less burdensome process for communities in the future, and we're excited now to move forward on the Stella work, and I'm going to talk a little bit now about the HMIS Capacity Building NOFA. If you were part of that process and you were an applicant, you will receive a notification from us soon and you should be getting that in the next day or two and it will update you on the process from now through the award process. You'll see what's kind of up and coming. I know we've been getting a lot of questions about, "When am I going to get notified?" So you should hear some more information about that.

0:04:28 Fran: Those are only for our folks that are in the application process for the HMIS Capacity Building NOFA. For NHSDC, we just wanted to let folks know that the registration is open for NHSDC. It's going to be October 15th through the 17th. It's in Austin, Texas. As in past NHSDCs, this one is HUD-approved and therefore you can spend HMIS funds awarded under the

CoC and ESG Solutions Grant Program to attend the NHSDC conference. And we also wanted to let you know that if you attended the last conference, and you attended one of the tracks that offered a certificate of completion, those certificate of completions have been sent out. If you did not receive one, then go ahead and submit an AAQ letting us know that you believed you should have received one and you did not, and we will look into that.

0:05:31 Fran: Also, there's an open call for proposals, and you can go to the nhsdc.org site if you believe your community is doing something interesting and you want to share that with other folks, please do so. Go to the NHSDC site and submit something. You'll see a comment on there about the system performance measures. We're going to try to align those to the LSA so you see that there. We don't have any information about actual submissions date but you see it's late 2019, early 2020. And we also have the coordinated entry timeline back there, if you were with us on our last call, you've seen this timeline before. Just as a reminder, all of the data elements need to be programmed by October 1, 2019. This includes the coordinated entry data elements, and then we have this window in which everything goes live October 1 but you get some extra time until April 1 to get those coordinated entry data elements, to get the workflow figured out, the project set up, access, all that kind of stuff before you have to start getting those live and collected. But they should be available to you in your HMIS by that day.

0:06:52 Fran: And we encourage you. HUD is going to be working to put out a lot of supporting materials to communities to help in thinking through how they can integrate this into their coordinated entry process. But we encourage you not to wait to start thinking about this. Start working in your community now. We encourage you to get with your CoC leadership and your vendor and talk through how you can best integrate these into what you're doing, but we're talking about what we can do around forming affinity groups, which we've mentioned before, on this call, producing guidance, we'll have opportunities to meet on the system admin call, in the future, to talk about this. And we'll be providing more direct support to the vendors, around this, too, and then we have future NHSDC coming up that we'll be able to talk about the coordinated entry data elements. And you'll hear about it on this call, too. I think that's it for me. I'm going to turn this back over to you, Mary.

0:07:58 Mary: Great. Thank you Fran. Alright, let's go to Meredith for technical updates.

0:08:07 Meredith: Okay, thank you. Good afternoon everyone. Oh sorry Mary I think I clicked at you, got excited that I could click it myself. So I just wanted to do a couple of updates on the CoC, APR and the ESG CAPER. I know we talked briefly I think about this last month and unfortunately just didn't get the specs posted just yet, but they will be up very, very soon, this week, for sure. So stay tuned for those. But I wanted to just highlight a couple of the changes that were made in the reporting specs this year and I want to give a shout out to those of you that keep pushing HUD on pushing TA providers on making changes to the APR. I think we do try to listen to the feedback and the comments that you submit in the AAQs and hopefully you'll see that some of your questions or issues that have been raised are being addressed in the APR. So throughout the entire document, you'll notice when you look at it that everything is updated to align with the 2020 data standards. There are some new questions, and there have been some questions that were removed.

0:09:20 Meredith: So just broadly speaking now, the APR has 69 tables and the CAPER has 39. I think it previously was 65 and 33 or something like that. So there's a few additional tables that you'll see in there when you go to see that new report. So just some of the highlights, Q4A which is the HMIS info. There have been a few additional fields added here for CoC Code GO code whether or not agency is a victim service provider, the HMIS software name, and then the report start and end date. And this is really so that when that data is being used for evaluation and planning purposes in Sage it can be a little more specific and a little more meaningful to those that are using that data. So hopefully that will improve that. Q7 and Q8 there are two-point in time counts of persons in household served. This is when we got a ton of feedback on and those questions have been updated specifically for the permanent housing projects that only those who are actually in housing are being counted in those questions. And so I think this will help address some of those issues that you all have raised around bed and unit utilization compared to the point in time counts, so we'll actually be comparing those two, those two pieces of data together.

0:10:46 Meredith: There have been a few changes in the income questions. So 19A3, which was client cash income change start to latest status/exit. One of those big, huge charts of sort of hard-to-read information about income. That's been removed and it's been replaced, actually with a new chart that will look at disabling and conditions and income, for adults at exit. So looking at those who identify as having a disabling condition and whether or not they have a source of income when they leave the project. And then finally Q23A and 23B, which are exit destination questions that we're dividing out those who were leaving within 90 days or more than 90 days have both been removed. And there's only one exit destination question at this point. So, looking at all levers regardless of the length of time in the project.

0:11:43 Meredith: So again, those are the just real briefly, sort of the most significant changes. There are certainly some additional changes with some header clarifications or response option clarifications that are also in the specs, and you will see those in the specs in the next couple of days. So, we're talking with vendors tomorrow, we're going to go through all of the changes and go through all of the reprogramming and updates in the specs so that they'll have a very much more in-depth sort of understanding of all the changes, they are being instructed to have their report available by October 1st, 2019. I'm sure they will have it done before then, because they generally go through some testing, and we will have Sage updated by September 1st, so that the vendors can do their testing, and if they release the reports early then you all can do that testing also in Sage.

0:12:45 Meredith: Similar to last year and prior years when the APR and CAPER have been updated, so this report becomes effective October 1, 2019. Users that are in the middle of working on an APR, or CAPER and have already uploaded their data don't need to do anything else. But if you have not updated or I'm sorry uploaded your data on oh I'm sorry, before 10/1, you'll have to upload the new version of the report. So we'll put some reminders out about this as we get closer to October also, but just wanted to remind folks, that that's out there. And just to be clear, we're talking about updates to the APR for the SSOs the non-CE projects, the transitional rapid re-housing. Those types of projects. There's not any anticipated changes, in the HMIS APR, or in the planning APR and then the coordinated entry APR will continue to be the same APR that currently exists until next year. So I think this is something HUD has committed to in the past, meeting or two, that they intend to release specifications for a new coordinated entry APR this year, but it won't actually go into effect until October 2020. So I think those are my slides at this point I'm going to look through the questions unless there's any that need to be raised verbally?

0:14:11 Mary: Yeah Meredith. I'm going assign two that came to me that I think are better for you, so I'm just going to do that and then move the presentation along because I think you can just answer them directly.

0:14:25 Meredith: Okay.

0:14:29 Mary: With the questions. I don't see anything else Abby, or Bryan, for Meredith to raise verbally or Fran.

[pause]

0:14:37 Mary: Okay, so moving right along. We're going to go through... This is our deep dive into the data standards. We're going to talk about 2.03 and 3.16 CoC codes, and then we're going to dig into some definitions, we've done on the fields and responses for 4.19 and 4.20. The new SM coordinated entry data elements. We're digging into 2.03 and 3.16 to start. Although I don't think it's super high on anyone's radar, but we have added some data collection clarifications and some extra instructions in the fiscal year 2020 data manual that we just want to call out, is really a result of seeing some reporting come in, obviously LSA as well as other reports having some conversations with CoCs about how these two elements are working locally. You know the DA also uses these two elements for their funding, and data collection. So we do want to point this out, it's complicated, it's what we present today might give you pause and feel like you want to go back and examine your data collection and your project set up.

0:16:02 Mary: Nothing that we're saying here is new per se but I think we're trying to clarify and point out that it's worth another look, if you feel like this doesn't quite jive with how you have been using these elements. Okay? So page 13 of the fiscal year 2020 data manual explains the general set up for project serving multiple POCs. And that's where the kind of new guidelines I guess I would say is. 2.03 in general records the CoCs on which the project is funded to operate. So you would set up multiple CoC records in element 2.03 if you are funded to operate in multiple CoCs with that project. And then 3.16 is about which of those CoCs that you're funded to operate in, the client is tied to in that project for reporting purposes. And both elements help you report accurate data about clients served by projects that are funded to operate in those CoCs. So if you're 2.03 or 3.16 data leave someone out of being reported, you'll need to revise your data collection and project set up of practices, kind of examine why that is, and what you can do to fix it.

0:17:21 Mary: So we're going to walk through a few examples of this. And again, it's complicated, we anticipate there's going to be some questions. Meredith and Jules are on hand to help me try and go through it as painlessly as possible. But definitely this is an area where if you're feeling like it's really confusing, it is. And you can see in the general FAQs to help clarify. Okay, so example one, site-based project funded by CoC A, but located in CoC B. So the example here is that CoC A has their HMIS and they're recording HMIS data, and they have funded a site and placed folks in that site, in a different CoC. Which is being recorded in CoC A's HMIS and the client data is in CoC A's HMIS. What this is supposed to be is where you would record the site in CoC A's HMIS as a CoC... As CoC B's site and the client data would be attached to CoC B inside CoC A's HMIS. Now when you report CoC A's client served, those clients will not show up in CoC A's reports, nor should they. The project was funded, it's operating in a different CoC and those clients are being served in CoC B, they're housed in CoC B. So it's a site-based project funded by CoC A but located in CoC B.

0:19:16 Mary: We need to make sure that there are 2.03 data elements aligned to CoC B inside CoC A's HMIS and that clients are being recorded as being tied to CoC B, within CoC A's HMIS. I'm sure I didn't say that as clearly as I could have and if Jules or Meredith want to jump in and clarify that example, you're welcome to.

0:19:52 Jules: I don't have any clarifications Mary. I think this is one of the more complicated and hopefully rarer situations that occurs. I think the important thing to emphasize is that CoC A and CoC B need to be talking to each other about how these data are going to be collected and how they're going to be transferred to the extent that it is necessary in all of these scenarios that we'll talk through. But this one in particular is a really complicated one.

0:20:21 Mary: And what we've seen then is that CoC A is running their LSA or with some performance measures and either nobody's reporting on the clients that are being served in CoC B, because CoC B isn't reporting on them. They don't have that client data, or the clients being served at CoC B are being erroneously added to CoC A's client data, and that's not where they're being served; they're in a different CoC.

0:20:55 Jules: I just want to add, there's a couple of comments coming in about this being the SSVF scenario. Actually, I think the next example is more akin to the SSVF scenario where something else is funding a project that operates in two different CoCs. In the previous case, what we're really talking about was a scenario where the CoC itself is the funding source for a project operating CoC B. So hopefully that's a little bit rarer than the situation like SSVF, which Mary is going to talk about next.

0:21:29 Mary: Yes, so... And the next two slides really are about SSVF funding. This is really what 3.16 was originally designed to account for, right? Example 2 would be where one grant is sending residential projects in multiple CoCs and the grantee is entering data into only one of the CoC's HMISs. This is what we see a lot with SSVF, where a single HMIS is getting all of the CoC data across however many CoCs that grant is funding project operations in. Mostly though, the SSVF grantees will set up agreements with the other HMISs and the other CoCs and maybe manually enter data into each CoC's HMIS. So whether you're doing data integration type, data migration, porting your data, however you want to say it, whether you're adding data to one HMIS as CoC A, and then setting up your project so that there are multiple CoCs listed in 2.03, and then you can add via 3.16 all of the accurate information as to which CoC that client is being served in, and then porting your data over to that other CoC so that they have that information about the sites and clients that are being served in CoC B, right?

0:23:20 Mary: In this example, CoC A is reporting all the information in one HMIS and maybe data transferring over to CoC B those clients that are linked to CoC B via 3.16. Or, like happens most of the time, the one SSVF grantee is logging into multiple HMISs depending on which CoC they're serving a client in today and adding that client data manually in each of the CoC's HMISs. So that's kind of our SSVF example where 2.03 and 3.16 work together so that SSVF grantees either by virtue of data transfer, they have a single HMIS and send data over to the other CoCs that they're serving, or they're logging into multiple HMISs and adding the client data appropriately to each CoC's HMIS in which they've been funded to serve. I'm going stop there and make sure there's no clarifying questions, clarifying information that we can provide around these examples.

[pause]

0:24:38 Mary: Okay. So then the last example is tenant-based rent assistance where a client is housed in another CoC's market rate unit. This means that the funder has said, "We're operating in, in this example, CoC B." CoC B is set up to operate their tenant-based rent assistance activities out of CoC B and they're using CoC B's HMIS and they're adding client data to that HMIS and tying those tenant-based rent assistance to the CoC that was funded to operate. But as is the case sometimes where CoCs are kind of located really close to each other, the market rate apartment that might be found for that client to be housed in might be in a different CoC.

0:25:37 Mary: You don't put 3.16 data as CoC A in this scenario. 3.16 is still CoC B because the project is being funded to operate in CoC B, the client is connected to that project in CoC B, they just happened to reside in a market rate apartment that is in a different CoC. And we think this might be where there might be confusion as well, because many people have, I think, wanted to use 3.16 as a way to identify where a client is moving over the course of a project enrollment, or that you're working closely with other CoCs to kind of place clients in different CoC locations. But that's not really what 3.16 in this example is used for. It's really to make sure that the CoC, CoC B in this case, can report accurately on all the clients served by their CoC. And in the case of a tenant-based rent assistance project that's funded to operate in that CoC, you'll want the client data to accurately reflect that you serve that client in CoC B, even though they might have gotten a unit in a different CoC.

0:27:03 Mary: So that is example four. I'm going to just take a moment to scroll through and make sure there aren't any questions, or if you guys have anything you want to raise. And again, this is really complicated stuff. We get it. And it's not necessarily where the communication's been extremely specific in past manuals. So we tried to shore up the data collection guidance in the next version of the data manual for fiscal year 2020. We're going to keep talking about it and we totally expect that you will submit some AAQs to get clarifications around your specific example. Okay. In the silence, I'm going to assume moving on is okay. And that takes us to the CE data elements.

0:28:00 Mary: We're going to talk a little bit about project setup and some framing around that. Jules is going to take that part. We're going to talk about each of the two coordinated entry data elements and some field and response descriptions that we've come up with since the original manual was published without any descriptions in there. So we anticipate, in terms of anticipate upcoming guidance and TA, Fran went over the TA kind of picture for coordinated entry. We will publish the updated manual soon to the HUD exchange once it gets 508-ed. And what we talk about today on this call will be available in writing here very shortly. So there's also the affinity groups like we've talked about. There is lots of work coming up to help guide and send HMIS leads and CoC leads and HMI senders along down the path of collecting these coordinated entry data elements. So with that, I'm going hand it over to Jules...

0:29:10 Jules: Hi.

0:29:11 Mary: For the next one.

0:29:13 Jules: Yeah, I just... Sorry for the silence. I was trying to respond to all these questions that are coming in about the client location. I will just say before just talking about this project setup or the coordinated entry piece, the idea for communicating the information about client location and project location is that this... We just want to bring to your attention the clarification. If you have some really specific example, and this is resonating with you as a concern, you're worried that you're not doing it right, submit an AAQ with some detailed information. It's very... As you can see, the answer is always kind of, it depends, it depends on exactly what the situation is, who's funding what, and where projects are located, and whether it's project-based or tenant based. So we want to put this on your radar screen so that you're aware of it and you're thinking about this. But you will probably need some additional guidance and support, especially if you're working with another CoC and you need to think through any kind of data transfer concepts or anything like that.

0:30:17 Jules: So you probably will need to first review the information in detail in the manual, and then kind of think about it with the CoC that you might be having project locations kind of cross the boundaries with, and then reach out to the AAQ to get more clarification for your specific situation. Okay, so moving on to coordinated entry. Yes, so I'm not going to really go into these slides in great detail, but the idea with the coordinated entry data elements that HUD put out is that they will support. We are very hopeful and confidence that they will support. And we want you to conceive of them as a supporting any of the setups that HUD has already kind of articulated as being appropriate coordinated entry setup. So you can use these data elements, or you might need these data elements in slightly different ways depending on whether you have kind of a single front door approach, whether you have a sort of hard location front door approach with multiple sites, or whether you have a really kind of no wrong door approach.

0:31:41 Jules: Any of these approaches, we wanted the data element... HUD wanted the data elements that were put together to really be flexible enough to work underneath the existing structure that you already have. So I think it's just really important upfront to set up these coordinated entry data elements as being there to try to bring some consistency to some very specific moments in a client's experience through what may be a different system in every single continuum of care. So, how you use these data elements might really look different from one CoC to another, but the idea being that at least for these particular moments in time, we have some consistency from CoC to CoC.

0:32:34 Jules: So I do want to just make sure that it's clear that you don't have to let the data elements drive your coordinated entry approach. You should make your coordinated entry approach drive how you use these data elements. So for example, if you have a single or multi-site front door location approach to your setup, then you would, at least in theory, you could create a kind of one coordinated entry project that runs underneath the background of all the other client enrollments in projects and that you would create as many of those projects as there are individual sites, if you have a multi-site, or you would create one if it's a single site. And that then each location that is doing the triage work and the assessment work, we have access to that project and be able to track the relevant coordinated entry data elements for the clients that are enrolled along that kind of that project that runs in the background of all their other involvements in other projects. And then if you were to have a... Mer, do you want to go to the next slide? You would have a no wrong door approach.

0:33:54 Jules: Similarly, you might create one coordinated entry project that kind of runs in the background, but then you might give access to that project to every single project that's doing any of the kind of assessment work, and that they could then track the clients into that project, as well as tracking the clients in their own project receiving the services that they received through the sort of more standard project service that that project provides. So you can read these slides at your leisure, or look through them and think about how they might help your CoC, think about how to use the coordinated entry elements. But these are just some broad strokes. It really comes down to thinking about how your particular coordinated entry system is set up, and how these data elements can support that structure. And that's the kind of hands-on support that HUD is going to be, to working to provide. I got a couple... I have a couple of notes saying that audio is cutting in and out, and so I'm not sure...

0:35:05 Mary: Yeah, it's not from me, Jules. I can hear you just fine. I don't know about other presenters.

0:35:12 Jules: Okay. Alright, well...

0:35:13 Mary: So...

0:35:14 Jules: Yeah. Sounds like some folks are having a little audio issues. But, okay, apologies for that. And maybe, if you are having those issues, maybe if you listen back to the recorded audio, it will be clearer. Alright, thanks.

0:35:29 Mary: Great. Okay, so moving on to these descriptions, definitions, right? We've looked at the field names and responses in the coordinated entry assessment element, and in the event elements. I'm going to go over assessment, Meredith's going to go over events. Nobody wants a presentation where you're just being read to, but we wanted to just point out and make sure that everybody paid attention to some of these descriptions. And also, if something isn't resonating with you, or this doesn't make any sense, this is your opportunity on this call to kind of think through that and maybe access some help from one of the presenters on the phone, but also to figure out what AAQ you want to enter, HMIS's AAQ you want to enter that might help us sure up a little more going forward. So, coordinated entry assessment 4.19. So we've got a couple of responses here, right? You do a date of assessment and that is of course the date the assessment occurred. You assign an assessment location and the instructions say, that come from a list of HMIS's projects, a list from 2.02 project information, the vendors could set this up as a drive list or something else you might have to type in, "Where is this assessment happening?"

0:37:04 Mary: Kind of like what Jules just went through, different point of entry might be occurring at different projects. The assessments might be being done in different places. The assessment type could either be by phone, virtual, or in person. So by phone is pretty straightforward. Virtually would be like via a website or app or some sort of screen-sharing conversation like this, if you want to record that, in-person, sitting down face-to-face. That's where the assessments... If this assessment was conducted in one of those types of ways. The assessment level is one of two things: Crisis needs assessment or housing needs assessment. So, let's... I'm just going to read it for you because we talked a lot about this definition. So the assessment for crisis needs is initial, short, focused assessment to help case workers identify immediate resolutions to address emergency needs including emergency shelter.

0:38:08 Mary: And a housing needs assessment is more in-depth, that's housing-focused to help the case workers, direct clients to resources for stabilization of their housing situation. The assessment questions, assessment answers, assessment result type and assessment results are then able to be determined locally. So what we say there is... Sorry, I used the CO5 of Appendix A. Those are all numbers in the manual, if you go and read those directly there. But assessment questions and assessment answers work hand-in-hand. So for example, "Where did you sleep last night?" "On the streets." So this is kind of a placeholder in this data element for you to add whatever questions and answers you have for your assessment. We see this question come in already.

0:39:12 Mary: I think today, do we have to do this kind of assessment recording if we haven't been using HMIS for recording our assessments up to this point? There's no have to here. This is coordinated entry option that allow you to better capture all the data about your coordinated entry system in HMIS if applicable to you. Fund source, local requirements, governance, all that stuff's going to play into whether you use this. But the idea here is that questions and answers go together, and then you go through your assessment questions and answers, write answers, and the result type and result of that assessment then get recorded as well.

0:40:01 Mary: So all locally defined, not really much more we can describe for you, but use these as you can locally to add to your data collection. And then finally, a prioritization status of either placed on the prioritization list which we defined as result of the assessment is that the client was placed on the communities prioritization list for housing resources, or the status was not placed on prioritization list in which case the definition results is that the client was not placed on the community prioritization list for housing resources. I think those are pretty straight forward. Again, think through how this might apply to you as well as the setup, kind of, that Jules walked through, and then how it relates to the coordinated entry events, which Meredith will go through.

0:41:00 Meredith: Hi, again. Thanks, Mary. Okay, so I want to walk through these here... Again, sorry to read the screen to you, but this is probably the best way we can do it at this point. So the field, you have the date of the event, the date the actual coordinated entry event occurred. Then you have broken down, like you've seen in the manual, we have access events and we have referral events. So these first ones you're seeing here on the screen are the access events, so referral to a prevention project and where to... HUD is defining the... Or describing, I guess, prevention project that it's a homeless assistance or homeless prevention assistance project, or whatever you might call it locally. And you'll hear that I'm not going to actually read that part in all of these, but in almost every one of these event descriptions, HUD tried to leave the door open for local equivalent. So you might not use those exact words, but you have a project that is doing those same things. You might not call it homelessness prevention, but if it is a homelessness prevention project, that would be your local equivalent and that would be the response option that should be used in the event that those referrals are being made.

0:42:21 Meredith: So then for problem-solving, diversion, rapid resolution intervention or service, this is again, one... We lumped lots of different names into this, but this is essentially the clients participated in a diversion or rapid resolution problem-solving conversations and received assistance or other local equivalent. And you can't quite see them in the way this is structured here, but there are dependent questions also, or dependent responses for some of these fields. So keep that in mind too. And when you're looking at this in the manual, you would actually see those dependent responses and you would see how these correlate these events, access or referrals correlate to results. The next one is a referral to a scheduled coordinated entry crisis assessment. So again, it's a referral to a crisis assessment. Those are described in 4.19 that Mary just reviewed. That's going to be the same with the full needs assessment. Please refer to the 4.19 definition or description of coordinated entry assessment.

0:43:32 Meredith: So moving into the referral events, so for the referral to a post-placement follow-up or case management, what this means is that they received a referral to a post-placement service or follow-up case management or local equivalent. And to take that sort of description a little bit further, a post-placement or follow-up case management service is a service provided to clients after they've exited a residential project. And these types of services are not limited to any particular project types. So we think about aftercare, these follow-up case management projects, they may look different in different communities. So we're just trying to get to the point that whatever you call it, and however it's structured in your community, if it is an after-care type project, this would be the response option to use. Referral to street outreach, pretty straight forward. Again though, if you need definitions, you can look at 2.02 for the definition of the street outreach project.

0:44:38 Meredith: Referral to a housing navigation project or services. So what is meant by this is that the client received a referral to an SSO or some other services only project or a service for the purpose of receiving housing navigation services or whatever the local equivalent is, because a specific bed or unit in another project wasn't immediately available. And the point of that sort of additional line there is that this isn't meant to be a substitute for a residential project. If you refer a client to a rapid re-housing project, and the rapid re-housing project is helping them identify housing, or providing some of those services, you would record that referral as a rapid re-housing referral, so you would select that response option. This is going to be different than that because this is when there's not actually a specific set or unit available, or perhaps as the next sentence goes on to say, it may be a different kind of housing, it might be subsidized or some other non-subsidized housing that these navigators would be helping a client find. So yeah, so we want to make sure that that distinction is being made, that this is a service project that you would be making a referral to.

0:46:01 Meredith: And then moving on to the referral to non-continuum services and eligible for continuum services. So this means that they were referred outside of this continuum to non-continuum services because they weren't eligible for any of the existing services. And these non-continuum services might be something like an emergency assistance project, like for those who are not at risk of, or experiencing currently, homelessness. So they are not eligible for the continuum services for any sort of reason, but an example might be that they're not currently experiencing homelessness. The referral to non-continuum services, no availability and continuum services, so this would be for clients who are otherwise eligible, eligible clients who couldn't be referred to continuum services because there are no openings. There's no availability in the continuum services, or because the client was eligible but not prioritized for continuum services.

0:47:06 Meredith: So they may have been eligible, but they didn't rank high enough in the community ranking process, or high enough on a prioritization list, or not on a prioritization list and couldn't be referred to any continuum services. These next two on here, just in the interest of time and not reading everything on the screen, referral to emergency shelter, referral to transitional, referral to joint PH-RRH, referral to RRH and referral to PSH, as well as the OPH, what's meant here is that a referral is provided, a referral indicates that there is actually an opening for the client to be housed in the particular project that they're referred to.

0:47:52 Meredith: So this isn't to go on like a waiting list per se, or to think about this type of project that might exist out there. This is really to mean that there is an opening at a particular project, there is a bed available, you can make a referral for your client to go immediately into that project. So you just want to try to make that distinction here that it is... These referrals are being made for open beds or units. And so then these are the dependencies that I sort of mentioned, and again, little trickier to see in this format, but you can see them if you look in the manual. The client housed or re-housed in a safe alternative, or the client housed or re-housed in a safe alternative. Yes, these are related to the diversion problem-solving rapid resolution referrals that were listed on that first slide.

0:48:52 Meredith: So this would be... A no response would indicate that they received a diversion or rapid resolution or problem-solving conversation, but they did not get housed or rehoused in a safe alternative and require additional assistance. And then on the other hand, you would indicate yes, if that diversion or rapid resolution problem-solving conversation and assistance did result in them being housed or re-housed in a safe alternative. That would be the point in which you would exit a client from the coordinated entry project. And then the next two are related to the after-care, so the follow-up case managements. I forget the other words we said on it, but essentially the follow-up case management post-placement type of referral, you would indicate a no response if the client received a referral to a post-placement or follow-up, but didn't actually enroll in that after-care or follow-up project. And then again, the yes would be that they received that referral and subsequently did enroll in the project to which they were referred.

0:50:05 Meredith: We have the location of the crisis housing or permanent housing projects. So this, if a referral is made to one of those projects that we were looking at on the prior page here, let's say they are referred to a transitional housing project, this information here can either be pre-populated from your HMIS, if that's something that your vendor is able to do for you, or this would be where you would enter the project name and the project ID of the project to which they were referred.

0:50:41 Meredith: So then the next step in this data element is going to be around the outcome, for lack of a better word, of the referral. So there's three options here. There's going to be that the client accepted. And so this means that the client was referred to one of those TH projects again, for instance, and that they ultimately were accepted, enrolled into that project opening. So that means that they accepted the placement and the provider accepted them also. The next option is the client rejected. And so this is going to be used in a case where a client's referred to an opening in a project but subsequent follow-up shows that the client decided to reject the referral to the project. So, this is important because this is really indicating client choice. So this is that the client was referred, but the client decided not to go to that project.

0:51:39 Meredith: And then, finally, there you have the provider rejected the referral. So this would be the referral was made, subsequent follow-up with the client or the project indicated that the client referral was rejected by the provider. Now there could be a couple of reasons for this, a provider may determine after meeting with the client and reviewing eligibility documentation, that the client actually isn't eligible for the projects and reject the referral. Or you may have a circumstance where a provider would reject a client referral, if the client failed to respond to the provider request for information, or otherwise failed to follow through with the requirements of the referral.

0:52:21 Meredith: So it's not necessarily that the client actively said, "I don't want this project referral," it's more that there was a lack of follow-through, or follow-up and the provider ultimately had to close out that referral. Yes. So then that last field there is going to be the date of the result. So this would be the date that either the client indicates that it was a successful or unsuccessful referral, or when the provider indicates that it's a successful or unsuccessful referral.

0:52:57 Meredith: Okay, so that's the coordinated entry event. And those descriptions were an attempt to address some of the AAQs that you all have been sending in, that vendors have been sending in as they are programming these different data elements into their software. So we're hopeful that this makes sense. This is what we were trying... We're trying to address specific questions. So as you're reading the updated manual, if there are questions, obviously submit an AAQ and we appreciate that sort of feedback.

0:53:30 Mary: Thanks, Meredith.

[overlapping conversation]

0:53:32 Meredith: Yeah.

[chuckle]

0:53:34 Mary: Okay, I do want to go over the calendar of upcoming meetings, because we had to change all of these meetings around to accommodate community of practice meetings that all basically occurred at the same time as our long-standing system admin calls, but that's okay. There's like a really small percentage of CoCs that are participating in the next round of community of practice, but we definitely, in addition to wanting to use this Adobe Connect platform to go forward, we want this meeting to be available for everybody who needs it. So we have moved the schedule. We'll just go through the end of 2019 with the schedule and see where we land after the community of practices over in six months. So we're going to move these to the third week of the month and we're just, from here, going to set up an every-other-month kind of schedule.

0:54:31 Mary: We'll add more or change that. If we finally don't need to have a call, we could always remove it. But we feel like a little more frequently is better than quarterly as we move towards the October 1 and April 1 go live on these new data elements. We don't want to conflict with other scheduled HUD activities like community of practice as much as possible. So mark your calendars. We'll send out the HUB announcement to give you enough heads-up if the meeting's happening. August 21st, October 23rd, December 18th, still at this 1:00 PM Eastern Time timeframe, so third Wednesdays of the month on that schedule, at least through 2019. We still have some AAQs to answer. I know I have a few that are assigned to me that I want to keep plugging away out here if we can. Is there anything else Fran, that we want to maybe escalate anything to a conversation, anything we feel was missed?

[pause]

0:55:48 Mary: Can't hear, Fran.

0:55:49 Fran: I didn't see... I didn't... [laughter] I didn't see anything specifically. So did anyone else see anything specifically to raise?

0:56:04 Meredith: I don't think so.

0:56:10 Mary: So, Abby Miller's saying, "What about Daniel's last question about thoughts on how CE elements can be used for planning beyond just reporting purposes?"

0:56:24 Jules: I mean, ultimately. That's really the goal. I'm not sure what planning specifically... What do you mean? Capital P planning or general concept of planning, but the idea that you can use these data elements to start to identify your active lists, your prioritized lists, make sure that you're tracking clients that might be falling off, haven't had an HMIS interaction in a while, what actions are you taking to support those clients, locate them, etcetera. That's really the purpose I think of these data elements is to support activities like that. The part that you report to HUD to some respects is sort of incidental to the idea that these data elements and tracking them would be useful for you on a day-to-day basis to actually providing better and more efficient services to clients.

0:57:25 Jules: But that's just my perspective on their intent, obviously. We have to get there to actually be able to put that into practice. Abby, I don't know if you can speak, but we had also talked at one point about having an expanded version of the APR to provide some support to describing what those kinds of active list and things might look like.

0:57:53 Abby: Yeah, so... Can you hear me?

0:57:57 Mary: Yes.

0:57:58 Abby: Okay. Yeah. So, yeah. I think that our next steps on this are obviously we need to figure out what out of the coordinated entry elements we want to incorporate into the required APR. Obviously, that would only be required for projects typed and funded as SSOCE, but really, I think the goal is in our thinking behind these elements the whole time was... These should create the framework or the landscape within which you can evaluate your coordinated entry for its effectiveness, for its accessibility and effectiveness across all kinds of metrics, time-based, how long does it take from identification to actually moving in somewhere, or from the assessment to the prioritization, prioritization to the referral. All of those are really good markers and metrics for local tracking of whether you're trending upward, trending downward on whatever the particular metric is. And I think you can also use... For long-term planning, I think there's a couple of elements of planning that you want to be thinking about.

0:59:35 Abby: There's, does your inventory meet the stated needs? And this is, I think, finally a chance to actually capture what the needs are, in a consistent, coherent sort of way, and to be able to evaluate your inventory against that. But then, also looking at questions like, does the location of the access point matter? Do you have some access points that are "performing" better than others, in that folks are getting connected into the system more quickly? Is your 211 operating as well as the physical access point? All of these things that you want to be evaluating, because the thing with coordinated entry that we have to be so careful with is, coordinated entry is not only a set of requirements, but it's a principle of opening access to the whole system, to people who have frequently been passed over or excluded from that system. And so, to go to a coordinated entry process, we have to be continually paying attention to whether access is actually open. Are we missing people? Are we losing people? Because if you're losing people with individual projects, that's bad, but if you have just one entry point and you're losing people, that's worse, because there isn't another way into the system. So, just some observations about the sorts of things that we think these will be helpful for in long-term planning.

1:01:25 Mary: Thanks, Abby. Okay. There are still a few questions, so I imagine... I told the other presenters will stay on and answer as long as questions come in. Awkward silences are fun. And I'll leave you with what I decided was today's joke. See if I get it right. I heard it, it's from a Laffy Taffy wrapper last night at dinner. What is a dragon's favorite time to eat? Night-time.

[laughter]

1:02:11 Mary: No? Okay. Alright.

[laughter]

1:02:14 S?: You got some laughs from the chat, Mary.

[chuckle]

1:02:15 Mary: That was a bad joke, yes, thank you. Alicia and I are on the same page here, that was a bad joke.

[chuckle]

1:02:28 Mary: Okay, we're gonna stay on for a little longer, probably answer some questions. But thanks so much for everybody's participations today. Please make note of the upcoming meetings. We will continue to do these deep dives into the data standards, and we of course really appreciate everybody's time. All my presenters, thank you so much for your time and we'll talk to you very soon. Please, don't close the meeting until we get all these questions answered, though. TDA folks. Thanks.

1:02:55 S?: Thanks, everyone. Thanks, everyone.

1:04:56 S?: Thank you.

1:04:56 S?: Thank you.

1:04:56 S?: Bye.

[pause]