

HMIS Webinar Transcript 3/16/2022

MARY SCHWARTZ: Welcome to the HMIS Lead webinar, we're gonna get started in just a few minutes. We kind of wait at the beginning of each session to make sure everybody is logged in and can hear us. So, you're in the right spot. We'll start in just a few minutes.

MARY SCHWARTZ: Welcome for those of you just arriving. This is the HMIS Lead webinar. We will get started in just a few minutes. Give everyone a chance to get settled in, audio working.

MARY SCHWARTZ: Okay, numbers are slowing down slightly so let's go ahead and kick things off. Welcome here today. You should be here if you are an HMIS Lead or a System Admin for your local CoC. This call is where we talk about updates in HMIS implementation guidance, give you information from HUD and Technical Assistance partners coming out around the needs of HMIS Leads and System Admins.

MARY SCHWARTZ: You might also be someone invited through the Continuum of Care, CoC list. This month we have a couple of agenda items that could use broader CoC input. So welcome. If you don't normally sit in on these monthly calls as an HMIS Lead or HMIS System Admin, we're happy to have you here as well.

MARY SCHWARTZ: If you randomly found this link on the web and are hanging out but don't have any HMIS or CoC specific need to be here, happy to have you, but this might be a waste of time for you. This is a very technical call and we're looking forward to giving you all of the great information that we have prepared for those of you in this field today.

MARY SCHWARTZ: So, just a reminder that we are recording this. We will post this as well as the transcript slide deck and Q&A to the HUD exchange when we are done. It usually takes about a week to get that posted. We appreciate your patience there and try to go as fast as possible.

MARY SCHWARTZ: You are muted, and you can't be unmuted. So, any interaction, clarifications, questions, anything that comes up for you during the content today, you can put into the Q&A. There will actually be a point today where we open a chat box, but that's not normally what we do, and we'd ask that you keep your chats very particular to the content at the time.

MARY SCHWARTZ: Anything that you need to ask us about should go into the Q&A. We may also ask you to put in an HMIS AAQ later because your question requires a little more thought or information than we can give immediately on the call. So, do use the Q&A to interact with us and know that if you are asked to put it in an AAQ later you will get a response through that portal at a later date.

MARY SCHWARTZ: So, let me do introductions. Of course, Fran Ledger from the SNAPS office is our HUD representative here today, she uses she/they pronouns. Meradith Alspaugh from the Partnership Center, she/her pronouns. Greg Barchuk is a name that you might not recognize, or you might, he doesn't normally join these calls, but he's here today from ICF to help with the security information and he uses he/him pronouns. Genelle Denzin from Abt Associates, she/her pronouns.

MARY SCHWARTZ: Jesse Jorstad from Abt Associates, he/him pronouns. Richard Rankin from Data Remedies also maybe an unfamiliar name to you but joining with Greg to walk through security, he/him

pronouns. Oh, Brian, I left him on there because we love him so much. He's not gonna be on the call with us today but Brian usually would participate as well. I'm Mary Schwartz with Abt Associates, she/her pronouns. And Kayla is in the background from Abt Associates, she/her pronouns. Welcome, everyone, thanks for being here.

MARY SCHWARTZ: The agenda today includes Fran's announcements, comparable database information, reporting timelines that are coming up, a little bit about NHSDC at the end of this month. Then we'll dig into ESG-CV uploads and some updates there with Meradith. Like we alluded to on February's call and I've said already a couple of times, we're gonna have a deep dive into security in HMIS, for HMIS Leads and CoCs.

MARY SCHWARTZ: Then we'll get into Jesse's LSA feedback session and ask for everyone's participation in that. I'll finish out with some System Performance Measures information, and we will close the call. We have about 90 minutes scheduled for today. So, it does look like we're probably going to use the most, most of those minutes and we should get started. Fran, take it away.

FRAN LEDGER: Well, thank you all for joining us, I'm glad you're here. I have just a little bit to go over today and most of it if you've been on the call before you've heard it, it will be familiar to you.

FRAN LEDGER: So, the comparable database slide. Again, we're putting it up because this is very important work. We're gonna be digging into this a little bit deeper in the coming months as we work more deeply with victim service providers and CoCs to make sure that communities are making sure they have compliant, comparable databases that are in place in communities. If you have any needs around compliant, comparable databases please submit an AAQ or a request for technical assistance, but there's some resources at the end of this slide for you.

FRAN LEDGER: Reporting timelines, these have been updated recently. Please note that on the SSVF reporting timeline there's a little bit of a shortened window for the submission period. So that has been tightened up a little bit. Be aware of that.

FRAN LEDGER: And for NHSDC, this is, it's exciting. I have heard that they've got some really good attendance numbers that are going to happen. Unfortunately, I won't be there. Wish I could be. But we will have another person from HUD that will be there presenting at the conference. And, of course, some great technical assistance providers that you are all familiar with so I hope that those of you that can go to the conference and enjoy it. We will be live streaming some of the HUD content that's gonna be presented at the conference. And we'll post that information up before the conference.

FRAN LEDGER: There is some COVID content, some of the practices that they're going to be putting in place on their website, on the registration page. If you're familiar with that, if you want to be familiar with that, you can go and take a look.

FRAN LEDGER: And I am going to hand this off.

MARY SCHWARTZ: Easy, peasy. It's Meradith's turn to do some ESG CSV updates. Oh, how many sessions must one attend to receive the HMIS foundational certificate? That'd be 4 out of 5. There's 5 available. If you attend 4, you'll get the certificate. Meradith, take it away.

MERADITH ALSPAUGH: Thank you. Just one thing I want to talk about here briefly, there will be a slight change in ESG-CV reporting. So, as Fran showed on a couple of slides ago, ESG-CV reporting for this quarter will be due by the end of April, April 30th. So, a slight change that's happening. Hopefully folks will like this. So, reporting on closed projects and those bundles will be copying forward.

MERADITH ALSPAUGH: So, historically, I think you all know this, that HUD requires the quarterly and the cumulative bundles and projects that closed had to continue having those cumulative bundles get submitted in Sage each quarter. Beginning with quarter 6, if a project was closed in a prior reporting period, and that cumulative bundle has already been submitted, there's not gonna be a need to continue to submit those cumulative bundles for those closed projects.

MERADITH ALSPAUGH: So, I know I've heard from quite a few folks that that was a bit tedious to continue uploading the same closed project over and over again. That doesn't have to happen anymore. So, again, this is a change that's going into effect for the reporting that starts after the end of this month. And any project that was previously marked closed and already in a cumulative bundle on its own is just going to get carried forward in Sage. You won't have to take any actions. So HMIS Leads and VSPs will not receive email links for those closed projects.

MERADITH ALSPAUGH: So, again, just like we've always said, you would upload the projects that you get the email links for. Just don't be surprised if you don't see them on these closed projects anymore, you won't have to continue to submit those.

MERADITH ALSPAUGH: So, that's all I wanted to say, I'm going to turn it over to Greg to get us into our conversation about privacy and security.

GREG BARCHUK: Thanks, Meradith. Hello everyone. Before we get started, wanted to just walk through a few reminders from last month's session, or refreshers for folks who couldn't join. We're in a place now, you know, in the work that we do in HMIS, where data is moving around in lots of different ways, and via different pathways. You know, especially coming off of the LSA data cleaning process, communities are really taking data quality very seriously. You know and communicating with providers to ensure that the data that's in HMIS is strong.

GREG BARCHUK: And also, you know, our field has recognized that we can't end homelessness alone and have been entering into data sharing agreements with other systems that interact with the people that we also serve. All of that's really important, it should be happening, it's the right direction for our field to be going. And at the same time, we need to monitor that as we're sharing data that we're doing so in a way that, you know, is protective of clients' rights and in adherence with our CoC's policies and procedures.

GREG BARCHUK: And as you all heard last month and has now been memorialized on the HMIS Leads Twitter, you know, "when in doubt, don't take it out". And if you take it out, don't just give it out. You know, we can't just take data out of HMIS and give it to someone, you know, someone else, even if there seems to be a benefit to be gained, you know, from that. There's some important considerations before you do that and some important considerations around how you do that, that Richard and I want to talk about for a few minutes with you here today.

GREG BARCHUK: So, when we're talking about HMIS security. What do we really mean? Is that just passwords? And it's not. It's also not something that people tend to think of as the most interesting or

highlighted part of being a system administrator. And it's something that not a lot of folks have a lot of expertise in. It's, I feel like this can go one of two ways here. If you start to dig into it, you can get really complicated and nuanced.

GREG BARCHUK: Or there's also this kind of, you know, parallel opinion that everybody knows all of this. I know how to make a strong password. You know, I know that my vendor, you know, has secured our HMIS in a way, because it's in our contract. And so, it's not something that we need to pay as much attention to. And yet, it really is something that's important to pay attention to and to make sure that our protocols are strong. You know we ask people that we serve very sensitive questions, and security and privacy are really the promises that we can make in exchange for that information.

GREG BARCHUK: You know we think about, we're asking people to give us really sensitive and personal information about the trauma that they've experienced, about their personal information, about their health, and we can't always offer them a bed or permanent housing afterward. So, security of their story, and the privacy to not share that information with someone else is what we can certainly offer, particularly as HMIS Leads.

GREG BARCHUK: We need the information that they give us so that we can report on how well we're doing with ending homelessness, where we're doing well, where we're doing poorly. And so it's just really important that, you know, we're mindful of the security and privacy policies that we have. So that we are upholding our end of that promise.

GREG BARCHUK: Alright, so I wanted to talk a few definitions before we really get into the details of this. We often mention privacy and security in the same sentence, and they're closely related. On the previous slide it said that security breaches can lead to privacy violations.

GREG BARCHUK: When we're talking about privacy, we tend to talk about the policies and procedures that govern uses and disclosures. Uses are the internal ways that we protect personally protected information, or personally identifying information. So it's, it's the how, it's why are we, and the why, why are we accessing this information? What are we doing with it when we access it?

GREG BARCHUK: Whereas disclosures are the circumstances under which that data can be shared either with or without consent. When we're talking about security though, that really refers to the ways in which we protect that information from being accessed by someone that it shouldn't be, either accidentally or intentionally. Or accessed by someone who has the authority to see it but is accessing it for purposes that they shouldn't be. So we can be looking at a couple of different kinds of security breaches here. Unauthorized access to HMIS or to client data. As well as improper storage of extracted HMIS data.

GREG BARCHUK: So things like, if an HMIS user signs an end user agreement for a specific purpose, but then is accessing that information for a different purpose, that's a security violation. That would be unauthorized access. Or, if we're thinking more in terms of how we're handling data, if we're printing out a list of client identifying information for a case conferencing meeting, you know, by name list, something like that. And then leaving that piece of paper on a conference room table. Or in a recycling bin that's unsecured, those are also security breaches. We've now exposed that information that's private and that we've told clients that we are going to protect for anyone else who may happen to walk into that room can now see.

GREG BARCHUK: Right and then the last thing that I wanted to talk through before we hand things over to Richard to talk through some more of the details of the how we do this, his roles and responsibilities. The good thing here is that HMIS Leads are not alone in ensuring that our security protocols are upheld. The CoC has a really important role here.

GREG BARCHUK: The CoC tends to vote on the security plan for HMIS. The HMIS Lead is, you know, generally tasked with implementing that plan, with monitoring the access to HMIS, with monitoring the handling of data outside of HMIS to the extent that they can, and training users in best practices. And then end users and agencies have a role here too, as well, you know, in adhering to the end user and agency agreements that have been signed and also educating participants in the ways that their data is protected.

GREG BARCHUK: And so for more on how we do that, I'd like to hand things over to Richard.

MERADITH ALSPAUGH: Richard, I think you might be muted, double mute.

RICHARD RANKIN: Yeah, I double muted, so sorry.

RICHARD RANKIN: Yeah, thanks Greg for outlining that first part. So, I'm gonna look at kind of the details of security, and a lot of this is based on the 2004 data standards. So, most of this shouldn't be too new and there's a lot of things have changed since 2004 on the technology front. So I'm going to cover some of those things that you might want to look at moving forward.

RICHARD RANKIN: So to kind of start off, there's 3 parts of security: physical security, and that would be things like making sure that workstations are physically secure and people don't have access to them so, they're behind locked doors, there's, you know, physical firewalls, etc, for your computers and your networking in your office.

RICHARD RANKIN: Personal security, and I think Greg touched on this a little bit but folks should have some kind of background checks. So, anybody that accesses the data and uses the data should have some kind of a background check done to make sure.

RICHARD RANKIN: And then we've got organizational security and this is where the policies and procedures come into place to ensure that people and agencies use the data correctly, and have, you know, access to data.

RICHARD RANKIN: So, security applies to all areas where we've got personally protected information, or PPI, when it's stored either electronically or physically. And physically might be print outs and that type of thing. So that includes computers, phones, tablets, servers, and cloud service storage. And this also includes all the covered homeless organizations. So any agency or any organization that has access to the data or uses HMIS data would also be, would be a part of the security plan.

RICHARD RANKIN: Under system security, there's, you know, user authentication. So that would be passwords. And, you know, access to the systems. Limited multiple access. And I'll go over what all these are in a minute. Virus protection. Firewalls, that protects your network and your individual workstations from, you know, intrusion from the outside. Encryption, which is very important for sending information. If all, we should be encrypted if there's any PPI included in that.

RICHARD RANKIN: You know, access controls, so limiting access to where you could potentially see the data either electronically or hard copy. Location control. Similarly. Backup and disaster recovery. And then system monitoring, so making sure that the system's monitored for intrusions. And then secure disposal of data.

RICHARD RANKIN: User authentication. Typically for most HMIS's it's through a password. You know, it should be, there's some examples here of strong passwords. I think some of the older documentation has some less secure password options. These are some examples of some stronger ones. So using, you know, a math formula, for instance, that has, you know, my dog and my cat equals 8 legs. So you make up some some, you know, maybe funny sentences that are that are meaningful, but you can format in this way. The other one is just use a different key on the keyboard, so replace letters and that kind of thing.

RICHARD RANKIN: But everybody on the system should have a unique username and password. So obviously we cannot share those passwords. And so we don't want to share or write down any passwords on a sticky note on your computer. So we want to avoid all of that.

RICHARD RANKIN: Multiple access is just that, we want to, most HMIS's limit user to one one login at a time. And if you go to another workstation it will prevent you from logging in a second time.

RICHARD RANKIN: Virus protection. This is important, that virus protection is on all computers and all devices that you have access to the Internet. Make sure it's updated regularly. And essentially, if it's not updated, it's not gonna be valid.

RICHARD RANKIN: Firewalls. These are either physical devices or software on your computer that will prevent, or help prevent intrusion into your network or your computer.

RICHARD RANKIN: And then physical locations. So if you have workstations in your office or computers, when they're not in use they should be in a locked office and have privacy screens. They should also have passwords to log into the computer, and they shouldn't be the same as your HMIS password. So you want to control access that way. And then servers, same thing. You want to make sure they're in a locked office or a room or cabinet.

RICHARD RANKIN: Another piece is backup and disaster recovery. If something does happen to your data you want to make sure you have access to current backups. Most HMIS vendors do back up and you want to make sure you check your contracts with your vendors to make sure that it's occurring.

RICHARD RANKIN: Secure disposal. This is very important when you have the end of life for your computer or any electronic device, you want to make sure it's disposed of correctly. The data is completely erased and wiped off your hard drives and any memory. And it's not, you can't just reformat hard drives. You need to erase. The data formatting will not actually erase the data and it is typically recoverable. And then hard copies. Anything with the PPI, personally protected information, should also be destroyed when it's no longer needed. And then if, obviously it should be locked up when you are, if you still need it.

RICHARD RANKIN: The electronic transmission of PPI. Make sure, and this is something we really need to keep watch on for all, everybody that uses HMIS. You want to make sure that anything that is transmitted electronically has to be encrypted. And so, including the HUD CSV, the SSVF CSV files, the new data quality worksheet that HUD just released, that all contains personally protected information.

Those files must not be transmitted without encryption and do not send them over email. It's not a secure method of transmission.

RICHARD RANKIN: And hard copy security. We touched on this briefly. Anything that's hard copy, any printed forms with PPI, by name lists, that type of thing, should be supervised if ever in a public area. So if you have a meeting, you're reviewing your by name list for example, make sure that all the copies are accounted for when you leave the meeting and they're properly destroyed when you're finished with those files, or those documents. Don't throw them in the garbage. Don't throw them in a recycle bin. Somebody could come by and pick up. So you want to make sure you account for all of those documents at the end of those types of meetings.

RICHARD RANKIN: And then since 2004, technology's changed quite a bit in almost 20 years. Smartphones, tablets are commonly used in the field for data collection. There's now cloud services, there's products by Google and Microsoft, and it's changed how and where our data is stored. Email and messaging services are much more commonplace. And remote work and video meeting platforms are now universally accepted.

RICHARD RANKIN: So, especially since COVID, a lot more people work from home. So we want to make sure we follow rules, the protocols there. So with smart phones, make sure you follow the same protocols as with your local computers. And then these devices should be locked up in a secure location when they're not used. And then a lot of us, smartphones do have a remote erase function, so if they are lost or someone, you can remotely erase those devices. So that data potentially couldn't be accessed.

RICHARD RANKIN: Cloud storage is another big, new technology that a lot of people are using more. There's a lot of different options out there and it's really important that you follow the same protocol that you use when you're looking at your HMIS vendor to make sure their storage and encryption policies are adequate for your policies and procedures. So it's really important that you make sure that those cloud services are secured for your needs.

RICHARD RANKIN: Email messaging. We touched on this already, make sure you don't send unsecure or CSV files over email and messaging services, you know, unless they're encrypted.

RICHARD RANKIN: Remote work. A lot of us are now doing work from home, a lot more than we have in the past. So if you have to transmit or transport documents to and from your home office, or generate reports with PPI at home, make sure you follow the same protections as your regular office. Make sure documents are locked, locked up when not in use and not easily accessible by anybody.

RICHARD RANKIN: And then video meetings, we're doing a lot more video meetings over, since the remote work came in. So if PPI is going to be discussed during these meetings make sure, you want to ensure that only the target audience is present. So many platforms offer a password to enter meetings and it's a good idea to use that. So you don't have anybody that's kind of, that might have the link and be able to log in and see what you're discussing.

RICHARD RANKIN: So, in conclusion, you want to make, everybody is responsible for proper data security. And this is done, you know, the HMIS Lead can provide security training regularly. So everybody is aware of their roles and their responsibilities for protecting data. And ultimately, it's the

HMIS Lead's responsibility to ensure data, integrity, and security of the HMIS data however it's used and stored.

RICHARD RANKIN: You want to make sure the data chain of custody. So as you transmit data, either electronically or through paper, or hard copy, you want to make sure you know the chain of command, or the chain of custody and you want to make sure that the security rules apply to each and everybody on that chain. So you don't want to lose track of your data with PPI.

RICHARD RANKIN: And then again, stressing this, all information with PPI must be encrypted when transmitted. You know, do not upload to the Sage system, the AAQ system, the ask a question, the VA, or any other reporting systems via unencrypted means, including email. And like I said earlier, the CSV files that are generated out of HMIS, the new HUD data quality tool, those all contain PPI data, and that must be encrypted before it's sent anywhere.

RICHARD RANKIN: And as Greg mentioned earlier, if in doubt, don't send it out. And then make sure that anything that you send with PPI is absolutely required by the recipient. So just ask a question, does this person you're sending the data really need PPI, or is aggregate data sufficient for their needs. Because we want to make sure we keep control of any protected information and make sure it's not sent out and leaked.

RICHARD RANKIN: So, here are a few of HUD documents, the 2004 Data Standards. Again, we covered most of that, so just become familiar with those. The Coordinated Entry Management and Guide system and then The Administrative Checklist as well.

RICHARD RANKIN: So that's all I have.

MARY SCHWARTZ: Cool, thanks Richard. I have a few just, questions for you to clarify. So if somebody's asking about data entry, if I'm understanding the question right, it's data entry on a public WiFi, meaning a staff person is logging in to HMIS with their user account and password on a public WiFi to enter client data, to do their job of entering data in HMIS. Is that a violation of the security standards or not?

RICHARD RANKIN: In the case where using public WiFi, you should be using a VPN, which is a virtual private network, which protects your data from that particular network.

MARY SCHWARTZ: And so somebody asked, given this guidance with privacy and security of HMIS data, what's your opinion on how to share data with healthcare organizations for data matching purposes? So that is more about privacy, not security. Privacy, being the determination of the CoC's uses and disclosures, allowable uses and disclosures of data that's gathered in HMIS, right?

MARY SCHWARTZ: So your privacy notice locally will define whether or not you have permission from your clients or permission given the privacy notice that you've established as to whether you can disclose client data and under what circumstances you can disclose client data to healthcare organizations. So that is a privacy notice question. I'll put that in writing but when it comes to the actual transfer of that data from one entity to another, if you have checked off that you have the ability via your privacy notice to disclose that data and then the transfer of that data is more of the security piece that Richard was talking about where you need to also, as the HMIS lead, take responsibility for securely transferring client data to the entities that are allowed to have access to your client data according to your privacy notice.

MARY SCHWARTZ: And last question here on security, whether, and privacy, whether it's okay to use DocuSign to obtain signatures on documents. That is not an HMIS question. That is a local, CoC allowability. You have to check with local rules and requirements. There is nothing limiting written versus electronic consent. For purposes of the consents, you need to operate your privacy notice fully.

RICHARD RANKIN: And Mary I think that also would fall under kind of cloud storage as well. Because a lot of those documents can contain PPI and they're up in the cloud, so to speak. So, I think following the same guidelines and procedures you would for any cloud storage device would apply to DocuSign.

MARY SCHWARTZ: Okay, anybody else see anything else? Presenters? Panelists?

JESSE JORSTAD: Before we switch over to LSA, I did just want to clarify that the HMIS CSV data quality tool, that tool itself, that Excel file, does not actually contain any data itself. Like, in terms of like from the CSV itself so what it's doing is, it's almost like a, I don't know, sort of like a view that you're laying over your data and when you click on the button to show, like what files are being impacted, it goes and it queries that data and it presents it.

JESSE JORSTAD: But if you save all that and close it, and then if you were to like, send the Excel file that is the tool itself to some other location and it no longer had a connection with that CSV file, it wouldn't be able to render any data because there is no data in the tool itself. So just a little point of clarity there. So, while you need to be storing your CSV securely and not sending that anywhere, the DQ tool itself doesn't have any data.

MARY SCHWARTZ: Thanks, Jesse, and take it away. LSA feedback session.

JESSE JORSTAD: All right, let's do this thing. So special shout out to the folks that are on the call that are not typically on this call. So other CoC staff, we really appreciate you taking the time to come here and let us know what your experience was like for the LSA this year.

JESSE JORSTAD: Here's a little overview of what we're gonna talk about. So we're gonna, I'm gonna give you a little update on what's going on, both for the data collection cycle that just closed, which was fiscal year 21 and then, as we look forward to fiscal year 22. I will share with you some of the feedback that we received so far, primarily from the vendors. Although some of it from our own staff as well.

JESSE JORSTAD: Touch a little bit on other known issues that you know about the stuff that we are very much aware of. Some planned changes for fiscal year 22, and then we'll get into the feedback session. So that feedback session's going to have 8 areas that we're going to touch on and then there's that last one, it's sort of a, if we didn't cover it go ahead and throw it in that one.

JESSE JORSTAD: So we're going to talk about support products that we released. We're going to talk about the HDX user interface. That's HDX 2.0 specifically. We're going to talk about flags both generally and then if there's specific flag issues, we'll talk about those too. Messaging that went out around the LSA, communication timeline, the review team, and then anything else.

JESSE JORSTAD: Okay, so first up, the analysis team for the AHAR is currently reviewing the data that you all submitted to identify whether specific data sets can be included in the analysis that determines the national estimates of homelessness. That's a process that we sometimes call usability. It's important

to remember that that word, usability, what we're actually looking at is, can your data be used to make assumptions about other unknown data to flesh out those estimates, right? In October, we talked about that a little bit more in depth. So if you want more information about what usability is, that's a great place to look at that information.

JESSE JORSTAD: Again, even if data were, if it was decided that a data set wasn't usable, or a shell wasn't usable for the analysis, it doesn't mean that the data isn't locally useful. So those are kind of two different things and while they are related, they are not exclusive.

JESSE JORSTAD: We understand there's desire to have those determinations shared and we are exploring how that might occur. So that you all can better understand what the continued data quality improvements can be although the final flags that you received are a reflection of your data quality at the time of submission. So that's probably gonna be your best information in terms of the changes that might need to be made to improve your data quality.

JESSE JORSTAD: Okay, so we're already looking ahead to fiscal year 22 and the primary thing that we're doing right now is reviewing the specifications and identifying needed and/or desired updates. Some of that stuff is just sort of some code cleaning to make things more efficient. And some of those things are exploring if there is other information that needs to be included in the LSA going forward. And some of that's based on the feedback that system admins gave during the last call about changes that they'd like to see in Stella P, which is the visualization of the LSA data.

JESSE JORSTAD: So, we did have feedback from vendors and then our own internal data liaisons. Wanted to just share with you, some of the things that we've heard already. You can certainly share these things again when we get into the feedback session, if that's helpful for you, maybe it just has therapeutic value. I support that, whatever you all need.

JESSE JORSTAD: So first of all, the general feedback was that the process was improved from the last data collection cycle. So if you participated in the 19/20 efforts you'll know that there were a lot of changes that were implemented for this last cycle and it sounds like most of those were well received.

JESSE JORSTAD: The process for us communicating your data warnings to you, it was late coming online and that was stressful.

JESSE JORSTAD: The CSV data quality tool that I just talked about a second ago, it was the vendor's perception that that was helpful in identifying many of the client records that were causing some of those clients.

JESSE JORSTAD: We also put out a tool called the Common Flag Library and folks viewed that as being useful. So that was the document that kind of explained in more plain language what the flag was even indicating, some reasons that it could be happening, some things that you could maybe do to potentially explore that and resolve it. And the feedback was that we should continue to expand that. So we prioritized sort of the most common flags and we'll continue to work on that document.

JESSE JORSTAD: A request for additional work to be done and to continue clarifying flag logic and communicating possible resolutions. They want more communication around what it means to be a vendor flag versus a CoC flag. So, as we get into the next data collection cycle, a while from now hopefully, then we can talk more about that.

JESSE JORSTAD: And then there's a request to be able to do the same kinds of checks that we're doing for the LSA data cleaning cycle, to be able to do that throughout the year, which is a cool idea. And it is feedback that we've heard before and something that we're interested in looking into. Okay.

JESSE JORSTAD: There were a few other issues that we are aware of that we want to share. So if communities attempted to replace the data set and that file was rejected after they had added warning notes, those notes became no longer visible to the user. That was obviously not how we intended that to work. And we tried to work with communities to try to get that resolved as quickly as possible.

JESSE JORSTAD: Also HDX closed prematurely, it was based on an Eastern time zone when we absolutely intended it to be based on a Pacific time zone. And some of the communities were planning to submit late in the day that day and were not able to, we did work with them directly to get their data submitted and every community that wanted to participate in the LSA was able to do that.

JESSE JORSTAD: After HDX had closed, there were some communities that attempted to replace their official dataset. And when they tried to do that, found that they could only submit a local data set because the submission period had ended. And when they did that, it wiped out their official dataset because they had chosen to replace it, blah, blah, all these technical details that don't really matter. Point is very stressful for folks. Again, we were able to work with those communities and get that information re-submitted. Okay.

JESSE JORSTAD: So we have a few things on our, in our sights, in terms of changes for next year. So the number one thing that we are interested in doing is to move the warning flags into HDX 2.0. What that would allow to have happen is instead of there being that delay after you've uploaded your data and you got all your errors, but then you're waiting a few days, maybe for your warnings, that would all be available at the time at which you upload. Which I think we can all agree would be a really big improvement.

JESSE JORSTAD: We'll continue to expand the common flag library. And then we will also determine if there are other checks that we could put in the data quality tool that would assist communities in identifying records that need investigation. You know, there are, like, probably about 30,000 flags for the LSA that are programmed and looking for different things. The vast majority of them are checking aggregate calculations.

JESSE JORSTAD: So they're saying if you said there was 2 and 1 and 2 people in this category and now you're saying that the total is 6, we're saying that that's not right. Something's wrong with the programming, right? Those types of checks we can't put in the data quality tool because that's actually a reflection of the programming specific to the LSA. That's not looking at the raw data itself, but there's a problem with the raw data, right? So we are limited, in terms of we can't create something that's going to be able to do all of those things because some of it's specific to that programming.

JESSE JORSTAD: We also don't have the ability to compare the HIC versus the HMIS, because we only have the HMIS data from the HMIS. So we wouldn't be able to do everything, but we definitely are looking to see if there are other areas that we could lend additional assistance.

JESSE JORSTAD: Okay, so if at this point, you've tuned me out, I totally get that. But now is the point where if you want to provide LSA feedback you might want to tune back in because we're going to give some instructions here.

JESSE JORSTAD: So it's challenging to do a meaningful feedback session on a call like this, because I think it's over 462 attendees on this call right now. So, we wanted to try out this new sort of, well it's new to me, platform for providing this feedback.

JESSE JORSTAD: Okay, so some of you have already clicked on the link in the chat. It looks like some of your cursors are broadcasting and so I'm gonna show you how to turn that off because it is a little bit distracting if you're trying to work on stuff. So, once you click the link in the chat, you can go ahead and enter as a visitor. You don't need to enter your name or your email address. You can just be anonymous. Let me go ahead and share my screen.

JESSE JORSTAD: All right, I thought we had this all shut off, but alas, it doesn't always go the way we planned. So in order to shut off all these cursors you can go ahead and click down here. And you can say, don't show me cursors and that will all turn off. So if you're getting a lot of cursors on your screen, you can turn that off for yourself so you don't have to watch all that going on.

JESSE JORSTAD: All right now, when it comes to navigating mural, you can just click somewhere and you can pull this around. Okay, you can zoom in over here on this tab. Right, the other thing you can do is we've created this outline over here. If you're missing this panel, you can click on this. It looks like a bulleted list. And that will pop up that window for you. So you just click that. This allows you to click on each question and it will center you there.

JESSE JORSTAD: Kudos to those of you using the drawing tool, but put that down, right? What we're gonna have you do is go ahead and double click and a post it note is going to pop up.

JESSE JORSTAD: Okay, if you want to be able to see that a little bit closer you can click on this magnifying glass, okay, and it will zoom in and then you can type in here whatever information you want to share with us. Okay? So that's how we're going to do things. So just review, you can click on the question that we're on. We're on number 1. You can double click here. It'll bring up a post it note. You can then zoom in here. And start creating your information. Now, don't worry if somebody puts theirs over yours, we will get this all sorted out in the end.

JESSE JORSTAD: Okay, so the first question, we want to talk about products. So, what products were the most helpful. Is there a product that you wish that we had created or that you want us to create in the future that would help you as you're trying to kind of sort through all the guidance and figure out what you're supposed to be doing.

JESSE JORSTAD: Yeah, and if you want to, you can even stick things over here. We can still find them and put them in the right spot. Although if you are outside of this square you might want to put a '1' in that box so we know what question you were shooting for there. All right, somebody's going with the big circle.

JESSE JORSTAD: A question about whether or not there can be feedback after this session. Mary I'm going to look for a head nod here. It seems like we could send out this link and keep this open for a few days and allow folks to continue to add to the board, is that...?

JESSE JORSTAD: I like it, I mean, it's a little bit noncommittal, but we will definitely leave this open for a few days so you can send this around if you know somebody else who wasn't able to make this meeting.

MARY SCHWARTZ: Jesse, can you, Jesse can you show how to take off the cursors again? Please?

JESSE JORSTAD: Yeah, absolutely. So if you're down here on your little icon, which is going to be the one kind of in the center, if you click on here, you can click don't show me cursors. And those will all go away.

JESSE JORSTAD: Also, if you're having trouble with this board and you're like, this is dumb, I hate this, this is the worst ever. We did open up the chat and you can drop things in the chat. And we have staff that are going to add those things to the board so that we have that all there. And I appreciate your willingness to try new things. I love your adventurous nature.

JESSE JORSTAD: All right, the thing is that this is sort of self-paced so if you're like, okay, I've given my feedback about the products I want to move on to something juicier. You can go ahead and click on number 2 and head over to the user interface.

JESSE JORSTAD: So, here we're talking about HDX. And we want to know how HDX 2.0 went for you this year, what could be improved. There were a lot of changes this time around, including having the flag communication happening inside that interface.

JESSE JORSTAD: So again, if you're trying to add feedback and you feel a little bit confused, you can just double click. And a post it note should pop up like this. And then you can hit this magnifying glass and it'll zoom in. So you can see a little bit more clearly what you're typing. You want to zoom in and out, you come down here and zoom out, like that.

JESSE JORSTAD: If you're following me, it occurs to me that I probably just very annoyingly move your screen on you. So, if you don't want to follow me you can just go ahead and hit release. I am going to snap back to question 2 here.

JESSE JORSTAD: All right, so about the user interface. We've got some information here about needing to give review and submit access to more than one primary person. Thank you for that.

JESSE JORSTAD: Being able to see when a flag was resolved. I assume that means, maybe like a resolution date, perhaps? If that's not correct, if you want to add any more detail that's helpful.

JESSE JORSTAD: Having a history maintained in the flag downloads.

JESSE JORSTAD: This one says the initial dashboard is fine. However, once you get into the reports or potentially doing downloadable reports, there are errors at times along with not compiling the report. Just to confirm, is that within HDX that that's being seen or is that within your own HMIS that that's occurred? If you want to add any more detail on that, that'd be great. Alright.

JESSE JORSTAD: Go ahead and find number 3 we are a little short on real estate despite our best efforts here. So, if you find that you're putting your comment outside of the sort of box that we had allotted for, if you can add the number just like this helpful person did that's super useful.

JESSE JORSTAD: So here, we want to know if you have any feedback on the flags. Here we're talking more about just like, in general the flags, right? So, description text, the note writing process, this year's flag warning process. If you are, if you have like, a post it note on your computer that's got like flag 787, if you've been waiting to tell me something about like 787. You can go ahead and drop that in section 4.

MARY SCHWARTZ: Pop quiz! What is flag 787, Jesse?

JESSE JORSTAD: Oh, great question. I don't remember. Last year when I was more intensely involved in the review process, I assure you, I had a number of those flag numbers memorized, but this year I was able to not be that involved in that particular process.

JESSE JORSTAD: Alright. So it sounds like people are still having struggles with kind of trying to decipher the flags. Looking for better responsiveness from liaisons. Maybe some increased attention to detail. Getting clear language on those flags. More details regarding where to find the error on the CSV files. Yeah, our hope is that HMIS admins are not necessarily having to interact with the CSV file itself. But I do, in terms of digging into the file, right? But I do understand the need for additional information here.

JESSE JORSTAD: Okay, I'm going to move on to question 4. Again, if you're still back on question 1, you got a lot to say about products, that's totally fine. This is going to be open for a few days. So feel free to go at your own pace. So here, again, specific flags. If you got that one flag that you want to talk about, or ten, or whatever you got going on. Or even if you're like, oh, when it talks about inventory for adult only families or something something, if you can kind of describe what the flag is about. We can track that down.

JESSE JORSTAD: Yeah, this comment here about the HIC tabs. That is duly noted.

MARY SCHWARTZ: Jesse. Were you planning on doing a, like, feedback review session, summarizing the feedback and reporting back to this group at some point in the future?

JESSE JORSTAD: Yeah, absolutely.

MARY SCHWARTZ: So it'll be on this call that that happens when it happens.

JESSE JORSTAD: Absolutely. And I want you able to know that we really like, scour this feedback and we try to implement as much as possible. We do want this to be as positive of an experience as possible. If you've done this for a few years, you'll know that there are pretty substantial changes from year to year.

JESSE JORSTAD: All right, I'm going to go ahead and move us along to messaging. So here we're looking for, you know, we try to communicate with you in a lot of different ways. So, for example, there were the listservs. There are these system admin calls. There are emails about the LSA data collection process. Want to know is there anything that didn't work? Is there anything that worked really well? Do you have any preferences on this?

JESSE JORSTAD: This red note, thanks for making it red. We're going to read them all regardless of what color they are, but I do appreciate it being red in this circumstance.

JESSE JORSTAD: So the Weebly sites. So this year we created a little site that folks could go to to find out if there were flags that were currently being under, or were under review, or had recently been changed

in some way. So this is a great suggestion about adding some dates and times about when something was changed.

JESSE JORSTAD: People appreciating some one-on-one communication with their liaisons. Calls and emails were great. Appreciating the personal emails from the liaisons.

JESSE JORSTAD: Could use weekly reminders though. Okay. That's interesting. Thank you. A solid messaging was adequate. Okay.

JESSE JORSTAD: Moving over to number 6 around the timeliness of communication. If you have any specific feedback around that. You know, we've got a general note from somebody that the timelines were too short this year. It's tough we're working on the LSA over the holidays. Absolutely.

JESSE JORSTAD: Somebody reporting that the data liaison wasn't as responsive as they needed them to be.

JESSE JORSTAD: So requests for some change in functionality around being able to have the review team review notes without it being submitted for review because you're working on flags.

JESSE JORSTAD: Yeah, it's tricky around the like, just the general timeline of the reporting period, you know, there's the holidays, there's PIT, there's a lot going on although if we waited much beyond that, then you've got, you know, when you're actually recording the PIT and HIC. That's tricky. We've got a really tight calendar, so definitely the pain is noted.

JESSE JORSTAD: Alright heading over to the review team. So, here in general, how did things go with your review team? What was helpful? What wasn't helpful.

JESSE JORSTAD: Somebody noting that they didn't have a lot of time once they started getting feedback from the liaison. I wonder if that is all related to kind of the delay with getting the warnings, because there wasn't a lot of back and forth prior to having warnings, right? Because folks weren't really writing, well, they weren't writing any notes because they weren't on yet. So.

JESSE JORSTAD: Oh, an idea about mini LSA office hour sessions. That's a really interesting idea. Thank you. Alright.

JESSE JORSTAD: Last one here, here you can put anything else. If there's any topics that we didn't ask about go ahead and put them in here.

JESSE JORSTAD: Folks looking for more guidance about when projects shift between participating and non-participating. What needs to happen there? Maybe we need a little more guidance on that.

JESSE JORSTAD: Looking for step by step instructions. I wonder if that's beyond the LSA submission guide, or if maybe that wasn't detailed enough. So if you want to add any more information there, that would be helpful.

JESSE JORSTAD: Having the deadlines in advance. That does sound heavenly.

JESSE JORSTAD: Looks like some support about having access to the errors throughout the year.

JESSE JORSTAD: Looks like a number of people commenting about just like the general overwhelming-ness of the timeline and the competing priorities. It'd be helpful to know if that was felt both by HMIS staff and CoC staff. Or if one of those groups was having a tougher time with it, just because of the other things that were going on.

JESSE JORSTAD: Okay, so again, this is going to remain open for a couple of days. So go ahead and continue to add your feedback there. We are going to have staff get this all sorted out and start categorizing it and quantifying it so that we can consume it all. And then we can start prioritizing things for review and changes. With that I am going to ask if there's any questions for me before I turn it over.

MARY SCHWARTZ: I don't think there are, I kinda butted in throughout your time and asked you what was there. So it'll be open for another couple of days to provide input. If anyone had to use the chat or the Q&A for input we'll get that added to the mural eventually and you'll do a feedback session in maybe a month or two on what the feedback, a feedback feedback session. Sounds great. Okay.

MARY SCHWARTZ: I just wanted to touch base real fast with y'all. You did a great job submitting your System Performance Measures reports on time. We are looking at the data now. It won't be until May that we add fiscal year 21 to the existing spreadsheet and Tableau and everything that's on HUD exchange right now. But I did put the link there for you to go and find the data that's out there currently.

MARY SCHWARTZ: If you resubmitted on fiscal year 20 data as well as submitting fiscal year 21 data, it will be replaced on the spreadsheet when we post everything. If you find that you made a mistake at some point in the near future and need to have fiscal year 21 submission be corrected, that is the reason you would resubmit next year your fiscal year 21 data.

MARY SCHWARTZ: So, a year from now, it'll be the end of the fiscal year 22 data submission process, whereby you, if needed, would have resubmitted 21 and submitted 22.

MARY SCHWARTZ: So pretty straightforward timeline again. We'll get the data back out to you. Remember that in this spreadsheet, you can go and find your sister CoCs and kind of see what others are doing in terms of system performance, by like AHAR category, or amount of CoC awards, or bed coverage rates, or a number of different factors. So make use of that data, and we'll let you know, on this call and via the HUD exchange when there's more data to enjoy from your recent submissions.

MARY SCHWARTZ: Data standard changes are upon us for fiscal year 24. It seems like a really long time away from now, but really the process has begun. So we'll have a session at NHSDC with a more specific timeline and opportunity for feedback. So, if you're going to NHSDC look for Meradith and Becca and I to hang out with you on that session.

MARY SCHWARTZ: If you are not going to NHSDC, or if at any time you have a suggestion, or any kind of input to fiscal year 24 data standards you are welcome to submit those via the HMIS AAQ, and we are categorizing everything and keeping organized so that we can come back to any AAQs submitted that offered some sort of suggestion.

MARY SCHWARTZ: Now, will we take every suggestion and implement it? No. But are we reading your suggestions? Yes. So make sure that you understand the expectation around your input into this process. The final say is HUD and the federal partners, and there may or may not be very, you know,

very specific changes that are accepted or rejected and for what reason, et cetera. So there's a thorough review, but not, it is not an expectation that every suggestion made will be incorporated. Just give your good ideas and good ideas will be looked at and talked through.

MARY SCHWARTZ: Anything to add their, Fran? Or Meradith? Did I frame that right?

MARY SCHWARTZ: You're muted.

FRAN LEDGER: I'm muted. No, that was, that was great. And I really do encourage everybody to submit information if they want it considered for the data standards. This is the time for us to take that opportunity and review that information. And we'd like to do that.

MARY SCHWARTZ: I'm looking back on the System Performance Measures, the two questions that are out there. So just real quick. If you are seeing within HDX 1.0 and you're running those CoC specific reports. And you're seeing that there are issues in those reports, like data not showing up from previous years, or anything like that, that needs to be an AAQ. So we can address that with the software folks running HDX 1.0.

MARY SCHWARTZ: There are a couple of known ones out there, but definitely submit it if you find it. And then we'll publish a system performance measure data set including measure 1B1.1 and 1.2 this year. And that's the one that includes 3.917 data as well. And probably not, we won't be updating the spreadsheet to include that. But I will note that that's a suggestion. And we'll work on it for the future maybe. Alright.

MARY SCHWARTZ: I think, please at this point too, submit any ideas you may have via the Q&A for future topics on this call, we are always open to your suggestions.

MARY SCHWARTZ: And the dual enrollments and duplicative inventory resource that we've been talking about forever, for a long time, is on the HUD exchange and we'll probably have that, a walkthrough of that, in months to come. There will be an LSA feedback session soon from Jesse. There will be more information, of course, from HUD and Meradith. Reporting specifications and all stuff that keeps our jobs continuing on.

MARY SCHWARTZ: So if you have any other suggestions for us, please feel free to share that. We'd appreciate it. Fran, anything else?

MARY SCHWARTZ: No, did you shake your head? I was looking down.

FRAN LEDGER: No, sorry, I just wanted to thank everybody for joining. Appreciate everyone's hard work.

MARY SCHWARTZ: Great. Okay Meradith, what do you get when you mix a collie, a labrador and a dalmatian? Oh, you can't answer your phone doesn't work. Okay, Fran what do you get when you mix a collie, a labrador and a dalmatian?

FRAN LEDGER: Oh, why, what do you get?

MARY SCHWARTZ: Collaboration!

FRAN LEDGER: Oh, that's good!

MARY SCHWARTZ: Thanks, you guys, have a great day, everyone. Take care.