Present: Mike Keller (EOCP), Andrew Wicker (CoC/City of Berkeley), Suzanne Warner (HCD), Robert Ratner (HCSA), Juliana Juarez (Abode Services), Mike Lindsay (ICF), Patrick Crosby (HMIS Lead), John Noe (HMIS Lead), Jessica Shimmin (EveryOne Home)

- Welcome  
  Mike Keller  
  9:00-9:10AM  
  - Next Meeting Wednesday January 15, 2020 9-11AM  
  - February 12 is a county and Berkeley holiday. In January the Committee will decide whether to cancel, reschedule, replace with a work group, etc.  
  - Beginning in March, the meeting will shift to the second Wednesday of the month so that it falls before the monthly CoC Board meeting.

- HMIS Oversight Public Comment  
  Jessica Shimmin  
  9:10-9:20AM  
  - None

- P&P/Training Plan Update from HMIS Implementation CoP  
  Andrew Wicker  
  9:20-9:40AM  
  - HMIS Implementation: Suzanne Warner, Andrew Wicker
    i. In a phase of getting the resources to launch that work. Will keep the committee updated.

- Data Quality Plan Presentation and Discussion  
  Patrick Crosby  
  9:40-10:20 AM  
  - Glad to see the data quality plan and policies on paper  
  - What is the relationship between the 2 documents? Suggest to structure and label the documents so that they relate to each other more clearly.
  - Policies and Procedures: redline edits can be done by email and sent to Patrick; include “Policies and Procedures” in the title. Add bullets so that each of the 5 pillars stand out, format each section in the same way.
    i. Procedures are the same for each section, so perhaps one generalized procedure at the end. Or, differentiate procedures more for each pillar.
    ii. **Timeliness:** needs to be more explanation of where that data comes from for users to understand what is being measured. How does HMIS calculate timeliness? Want to incentivize it with the COC NOFA process as part of the data quality calculation. Perhaps start with 75% in 3 days by 2020, 85% in 3 days by 2021, 95% in 3 days by 2022, and 100% same day by 2023. Mike Lindsay: Timeliness standard should relate to CE standards and needs.
    iii. Is a monthly liaison meeting too burdensome? Add to the existing HMIS User Group meeting, which organizations are meant to attend. Makes sense for the Agency Liaisons to meet monthly. Perhaps phase out general user participation in a monthly meeting, scale back to quarterly.
    iv. **Completeness:** it would be helpful to more precisely define what completeness means. Perhaps circumscribe to HUD data elements. What are appropriate levels of “client doesn’t know” or “refused”? Keep it global on the error rates and refine in 2020. Overall error rate on UDEs is around 11%. Propose striking the language around engagement date, because there will be errors before the engagement date. Mike Lindsay: No standards before engagement date. Standards only after engagement date, and date of engagement should be at the point of a deliberate assessment when data can be collected. Move the standard from 11% to either 8% or 5% on each element. There is concern that 5% is not realistic for first year. One place this might be an issue is SSN, because some people don’t have SSNs, some people will never ever share that information, RHY don’t collect from minors on principle, etc. Explain in each where the number comes from. Could be 5% for the overall
score on PII, UDEs, Income, Chronic homelessness, and \( \leq 25\% \) error rate on Annual Assessment. Annual Assessments are an outlier with significantly higher error rate (75%).

v. How does the data quality program get launched to the HMIS user community? System wide convening kick off, inform people of what we’re doing and where we’re headed. Invite/Communicate as well to management at participating agencies to put it on their radar, too. Present the agency liaison role to community for feedback and cultivate buy in. CoC Committee is scheduled to review/approve DQ plan January 21st. February will be busy month with NAEH conference, so try to convene community meeting by early March?

vi. On all sections: define the pillar more concretely, explain how the measurement is arrived at. Revisit targets at next meeting. Target setting principles: first year focus on setting realistic goals with the understanding that we will revisit in a year.

vii. What happens when we identify agencies with many deficiencies and challenges? We will learn more about those agencies in the next year. But some accountability should be written into the plan, for example providing more technical assistance and training to agencies that are struggling to meet the requirements.

viii. Agency Liaison Role: Security officer may be a different person than the person who does data quality, training coordination, etc. Not currently required by HUD. Remove language about security officer role and add AL has general responsibility to assure agency’s compliance with privacy and security standards. Soften language a little bit around training to allow for our evolution of training program, ensuring that staff who need access to coordinated entry have completed required trainings. Will be rolled out in early 2020.

- **Coordinated Entry Restructure**  
  Jessica Shimmin  
  10:20-11:00AM
  
  - Principles: keep things consistent, avoid radical changes
  - Who will be informing this work?
    - i. Volunteer Working Group: Laurie Flores, Daniel Cooperman, Nic Ming, Mike Keller, Juliana Juarez, Robert Ratner, Jessie Shimmin
  - What did Trevor create in the testing environment?
  - What decisions and work remains to be done?
  - How will we roll out the changes to the HMIS community?
  - Jessie and Patrick will begin a weekly check in. Jessie will send a Friday email to the HMIS Oversight Committee summarizing work done during the week and the next week’s agenda.
  - Need to clarify roles and who is responsible for managing the project - and assuring integration with the various consulting projects happening simultaneously (ICF, Abt Associates, and Katherine Gale). HUD CoC should designate project manager in January.

- **Agency Onboarding**
  
  - Robert is working on expanding PSH coverage and encouraging providers to join the HMIS. He’s received reports that the agency onboarding is slow.
  - Committee would like an update on agencies seeking onboarding and where they are in the process (perhaps a chart?) to be a standing part of the HMIS Oversight Committee meetings.
  - Also, in January, an update on the revamp of onboarding materials.

- **Closing**  
  Mike Keller  
  11:00AM

- **Next Steps**
  
  - Data sharing: updating draft policy with language from November meeting
  - Establishing a Common Agenda #3: Can we look at the current MOU and plan/strategize to make that document live. Jessie will work to set that up.
**HMIS Training - Action Plan**

**Alameda County HMIS - Community of Practice**

**GOAL:** Improve capacity, accessibility, and quality of HMIS User Training

<table>
<thead>
<tr>
<th>Action Step Needed</th>
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</table>
| Action Required: Move privacy & security trainings to an online format, including testing and certification. | 1. HMIS staff to provide content based on updated P&Ps for privacy (*see separate action plan)  
2. HMIS Oversight Committee to support development & approval of P&Ps  
3. Consultant (TBD) to build out web-based module  
4. County ITD staff and/or County HCSA staff to support online platform | 1. Patrick Crosby  
2. Robert Ratner, Jessie Shimmin  
3. Consultant (TBD) | 1. Update content to be captured in training (Feb)  
2. HMIS Oversight Committee to review & approve P&Ps (Apr)  
3. Hire consultant (Jan)  
4. Select platform & launch (Feb) |
| Action Required: Develop learning modules for current/ongoing users to access tutorials on specific workflows/functions as needed (create an online library to support user knowledge), including how to generate reports | 1. HMIS staff to provide content based on Clarity workflows and user roles (i.e. documenting outreach contacts)  
2. HMIS Oversight Committee to provide input on behalf of the community on topics needed.  
3. Consultant (TBD) to build out web-based modules. | 1. Patrick Crosby  
2. Suzanne Warner  
3. Consultant (TBD) | 1. HMIS Oversight Committee propose content areas (Feb)  
2. CoC send out surveys to community as well? (Feb)  
3. HMIS staff develop content areas/provide workflow information (Mar)*  
4. Consultant build out content (Mar)*  
5. Reformat monthly user group meetings to convene around these topics (Apr)* |
| Action Required: Implement a ‘train the trainer’ model to support moving all user trainings online (with in-person agency support) | 1. HMIS Agency Manager role for Data Quality identified across larger participating agencies  
2. Consultant (TBD) to support curriculum & delivery for ‘train the trainer’ courses  
3. HMIS staff to | 1. Andrew Wicker, Mike Keller  
2. Consultant (TBD)  
3. Patrick Crosby | 1. Identify relevant staff to participate (Apr)  
2. Build out training course (Apr)*  
3. Set up training and launch (May)* |
| Action Required: | Coordinate logistics for offering train the trainer courses | 1. Consultant (TBD) to work with HMIS staff on build out of content  
2. HMIS Oversight Committee to give input and feedback during development process  
3. HMIS staff to develop new workflows for issuing user licenses based on online testing and certification results | 1. Consultant (TBD)  
2. Andrew Wicker, Mike Keller  
3. Andy Duong | 1. Record/Zoom New User Training scheduled (Jan)  
2. Build out all new user content w/ help from consultant (May)*  
3. Launch online (Jun)*  
4. Reconstitute monthly user groups to office hours/online drop-in support to support new users (Jun) |

| Action Required: | Move the New User Training online (after kinks have been worked out through the privacy & security trainings, and agency ‘trainers’ are in place for support), including testing and certification. | 1. Consultant (TBD) to work with HMIS staff on build out of content  
2. HMIS Oversight Committee to give input and feedback during development process  
3. HMIS staff to develop new workflows for issuing user licenses based on online testing and certification results | 1. Consultant (TBD)  
2. Andrew Wicker, Mike Keller  
3. Andy Duong | 1. Record/Zoom New User Training scheduled (Jan)  
2. Build out all new user content w/ help from consultant (May)*  
3. Launch online (Jun)*  
4. Reconstitute monthly user groups to office hours/online drop-in support to support new users (Jun) |

| Action Required: | Implement a learning quiz at the end of all online content to gauge effectiveness of content and mode of delivery (ongoing QA & QI). Also, an online evaluation of the training itself for QI purposes | 1. Consultant (TBD) to develop quizzes and training evaluation  
2. HMIS staff to launch it online  
3. HMIS Oversight Committee review online evaluation results | 1. Consultant (TBD)  
2. Patrick Crosby  
3. Andrew Wicker, Mike Keller | 1. Institute after the above is complete (Jul)  
2. Present and take action on evaluation results at HMIS Oversight Cmte (Aug) |

| Action Required: | Develop written training guides and companion materials to the online offerings | 1. Consultant (TBD) to develop based on content generated by HMIS staff for online offerings  
2. HMIS staff to review, provide edits as needed  
3. Partner agencies to review, provide edits as needed | 1. Consultant (TBD)  
2. Patrick Crosby  
3. Andrew Wicker, Mike Keller | 1. Review written guides in HMIS Oversight Committee (Aug)  
2. Send out drafts for feedback to partner agencies (Aug) |

*Workflows will be impacted by system reconfiguration for CES happening prior to 4/1/20.*
## Policies and Procedure Developments - Action Plan

### Alameda County HMIS - Community of Practice

**GOAL:** Revise HMIS policies and procedures to reduce confusion and create a unified process with a specific focus on privacy and security.

<table>
<thead>
<tr>
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</table>
| **Action Required:** Review HUD privacy guidelines and similarly sized CoC’s privacy policy | 1. HMIS staff  
2. HMIS Oversight committee support P&P development and approval | 1. Patrick Crosby | 1. Review HUD Final Notice & HUD Coordinated Entry Data Guide (Jan)  
2. Review Comparable CoC Privacy Policy (Jan)  
3. Discuss findings with HMIS Oversight Cmte to identify focal points and direction (Feb) |
| **Action Required:** Review existing Alameda County HMIS Policies and Procedures | 1. HMIS Staff  
2. HMIS Oversight committee | 1. Patrick Crosby | 1. Review HMIS P&P, MOU, ROI, User Agreements, and supporting documents (Jan)  
2. Identify outdated sections and potential changes to existing policy (Jan) |
| **Action Required:** Outline planned changes and discuss with oversight committee | 1. HMIS Staff  
2. HMIS Oversight committee | 1. Patrick Crosby | 1. Outline planned changes to privacy policy (Feb)  
2. Discuss planned updates with HMIS Oversight (Mar) |
| **Action Required:** Update Policies and Procedure documents | 1. HMIS Staff  
2. HMIS Oversight Representative(s)  
3. County Counsel to review | 1. Patrick Crosby | 1. Update HMIS P&P, MOU, User Agreement, Related forms and materials (Mar)  
2. County Counsel to review changes (Mar) |
| **Action Required:** Community Review & CoC Approval | 1. HMIS Oversight Committee  
2. HUD CoC Committee | 1. Robert Ratner, Jessie Shimmin | 1. Approve at Oversight Committee (Apr) |
<table>
<thead>
<tr>
<th>Action Required: Update community on changes to Privacy Policy</th>
<th>1. Andrew Wicker</th>
<th>2. Approve at CoC Committee (Apr)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Patrick Crosby</td>
<td>1. Push out communications via HMIS email and user-group on proposed changes (May)</td>
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<td></td>
<td>2. John Noe to work with County ITD</td>
<td>2. Users/Agencies to reaffirm MOU and User Agreements as needed (May)</td>
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<tr>
<td></td>
<td>3. Andy Duong to update agreements</td>
<td></td>
</tr>
<tr>
<td>Action Required: Update Privacy Training Curriculum</td>
<td>1. HMIS Staff</td>
<td>1. Coordinate with Training Development team (June)</td>
</tr>
<tr>
<td></td>
<td>2. Training Consultant</td>
<td>2. Update Privacy Training Manual, Training Test, and other materials (June)</td>
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<tr>
<td></td>
<td>3. Staff from training development team to coordinate efforts</td>
<td>3. Update other materials (June)</td>
</tr>
<tr>
<td></td>
<td>2. HMIS Oversight Committee</td>
<td>2. Presentation of findings and recommendations to Oversight Cmte (May 2021)</td>
</tr>
<tr>
<td></td>
<td>3. HUD CoC Committee</td>
<td>3. Approve at CoC Cmte (June 2021)</td>
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</tbody>
</table>
Alameda County Homeless Management Information System Data Quality

General Objective:

Data quality is built on five pillars: Timeliness; Completeness; Accuracy; Consistency; and Coverage. Our data quality program should establish policies and procedures to strengthen each of these pillars to improve the reliability of analysis that we do about the effectiveness of our provision of services to our homeless community. The goal of our community members should be to regularly review data quality and consistently make improvements in their data quality measures.

Timeliness: Timeliness is the entry of data in close proximity to the time the data was collected. The shorter the period between the time the data was collected and the time the data was entered, the more beneficial the data is to the community. These data are used to inform decisions about providing client supports. Timely data supports good decisions.

Policy:

The Continuum of Care (CoC) has standard forms for collecting HMIS data at project enrollment, for annual updates, and at project exit. Some projects also have standardized assessments for collecting supplemental data.

Standard:

All data collected for HMIS should be entered in the HMIS within three days of collection.

Procedure:

Participating agencies/jurisdictions should run the HUD Annual Performance Report (APR) or HMIS Data Quality Report at least once a month to monitor overall agency performance.

Reports should be run at the project level to identify underperforming projects. The information should be used to identify potential workflow issues or staffing issues that are contributing to delayed data entry.

Timeliness should be reviewed at the Agency Liaison Meeting that is convened monthly and facilitated by the HMIS Lead. Agencies should be prepared to share their performance, discuss challenges, and develop strategies to improve performance.

HMIS Lead should present timeliness reporting to HMIS Oversight Committee on a quarterly basis.

The CoC should add timeliness to the scoring criteria for the annual CoC Local Competition for funding.

Best Practice:

Running reports on a weekly basis and correcting data quality issues uncovered by the reports builds a culture of timeliness. Workflow and staffing issues are discovered early which greatly reduces the systemwide impact of data issues.

Timeliness metrics should be included in program contracts and monitoring, as well as performance incentives and reporting requirements for funding.
Completeness: Completeness is a measure of how well we know the clients that we serve. Those clients that we develop meaningful conversations with should have the most complete records. Incomplete client records can be a warning flag that we do not have enough of a relationship with the client to fully understand their immediate needs.

Policy:

All data on standard collection forms is required to be collected. Error rates include missing data, data not collected, client doesn’t know, client refused, and fields with data quality issues. Data should be collected on all clients being served or assessed.

Standard:

5% or less error rate for ES, TH, RRH, PSH, SSO, HP and Other projects.

25% or less error rate for SO and CES projects prior to clients having and engagement date. 5% for SO and CES projects after an engagement date.

Annual updates should be completed on all clients enrolled more than twelve months. The annual update should be completed thirty days before or after the client’s anniversary date.

Procedure:

Participating agencies/jurisdictions should run the HUD Annual Performance or the HMIS Data Quality Report looking specifically at Personally Identifiable Information, Universal Data Elements, Income and Housing Data Quality, and Chronic Homelessness.

At a minimum the reports should be run on an agency-wide basis at least once a month to monitor overall agency performance. The information should be used to identify data collection and data entry problems and resolutions to those problems such as staff training.

Completeness should be reviewed at the monthly Agency Liaison Meeting convened and facilitated by the HMIS Lead.

Completeness should be reviewed at the Agency Liaison Meeting that is convened monthly and facilitated by the HMIS Lead. Agencies should be prepared to share their performance, discuss challenges, and develop strategies to improve performance.

Best Practice:

Running reports on a weekly basis and correcting issues uncovered by the reports builds a culture of timeliness. Workflow and staffing issues are discovered early which greatly reduces the systemwide impact of data collection errors.

Accuracy: Accuracy is a measure of how well the client record reflects the client experience. Accuracy is the most difficult to measure objectively. We look for indicators that are inconsistent within a client record. We also look for indicators that project data is unlike other similar projects. Accuracy is best checked by comparing project hard copy files to project data elements.

Policy:
Agency staff should maintain electronic client records in HMIS that accurately reflect the known current situation. This should include maintaining the client’s enrollment information and ensuring that project census data accurately reflects the project population on any given night or period of operation.

Standard:

100% of PSH should have move in dates.

100% of RRH with rental subsidy should have move in dates documented in HMIS.

0% child and unknown age heads of household, except for RHY programs.

Enrolled project population should not exceed project capacity unless overflow capacity is established and reported to the HMIS lead for the Housing Inventory Count (HIC).

Client demographics and program data elements should be consistent with project eligibility requirements.

Procedure:

Participating agencies/jurisdictions should run the HUD Annual Performance, Data Quality Report and Missing Move-In Date Report and any community reports found in the data quality section of the reporting tool.

At a minimum the reports should be run on an agency-wide basis at least once a month to monitor overall system performance. The information should be used to identify potential workflow issues or staffing issues that are contributing to delayed data entry.

Completeness should be reviewed at the Agency Liaison Meeting that is convened monthly and facilitated by the HMIS Lead. Agencies should be prepared to share their performance, discuss challenges, and develop strategies to improve performance.

Accuracy should be reviewed by the HMIS Oversight Committee on at least a quarterly basis. Timeliness metrics should be included in program incentives and reporting requirements for funding.

Best Practice:

Running reports on a weekly basis and correcting issues uncovered by the reports builds a culture of accuracy. Workflow and staffing issues are discovered early which greatly reduces the systemwide impact of data issues.

Consistency: Consistency looks at agency and project performance metrics. The measure looks for abnormalities in performance objectives. Clients served should meet qualifications. Throughput should be somewhat consistent over periods of time. Performance outcomes should be reasonably consistent as well. Additionally, data collection should be consistent with other projects of the same type within the Continuum of Care.

Policy:

Client and project data should be collected on data collection forms that are standardized and maintained by the CoC and communicated to the HMIS Lead. Supplemental data should be collected on supplemental assessments defined by the program funder. Agencies can collect additional supplemental data by coordinating with HMIS staff to develop a supplemental assessment that maintains data consistency across the CoC.
Standard:

Coordinated entry assessment should be done on a standard assessment used by the CoC.
Duplicate clients should not be created.
Project enrollments should be done on a standard set of forms used by the CoC.
Supplemental project data should be collected on supplemental forms and entered on supplemental screens common to that project type.
Supplemental agency data should be collected on supplemental forms and entered on supplemental screens common to that agency’s projects.

Procedure:

Participating agencies/jurisdictions should run the HUD Annual Performance and any community reports found in the data quality section of the reporting tool. At a minimum the reports should be run on an agency-wide basis at least once a month to monitor overall system performance. The reports can be run at the project level to identify underperforming projects. The information should be used to identify potential workflow issues or staffing issues that are contributing to delayed data entry.

Timeliness should be reviewed by the CoC committee responsible for overseeing system performance on at least a quarterly basis. Timeliness metrics should be included in program incentives and reporting requirements for funding.

Best Practice:

Running reports on a weekly basis and correcting issues uncovered by the reports builds a culture of consistency. Workflow and staffing issues are discovered early which greatly reduces the systemwide impact of data issues.

Agencies should use regular reporting to ensure that project performance is meeting or exceeding project expectations and is consistent with project expectations.

Coverage: Coverage is the measure of how completely bed and unit inventory information is captured in HMIS. Coverage is a measure of the confidence level we have in the representative value of our data. The higher the coverage percentage, the more confident we can be that the data in our HMIS is representative of the data in our CoC. The more actual data we have, the less anecdotal data we use. Coverage is measured at the project level by dividing the total number of beds that we have represented in HMIS by the total number of beds that we have available in the project. At the agency and system level, coverage is measured by dividing the total number of beds, for that project type, that are represented in HMIS by the total number of beds that we have available for that project type.

Policy:

All housing dedicated to improving the living situation of homeless people in Alameda County should capture client and project data in HMIS.

Standard:

Goal of 95% coverage across emergency shelter, transitional housing, rapid re-housing, and permanent supportive housing that appear in the HIC.

Procedure:
The HMIS Lead should present coverage rates to HMIS Oversight Committee and CoC Board twice a year.

HMIS Oversight Committee and CoC Board identify and outreach to providers and programs that aren’t in the HMIS.

Agencies ensure that all of their beds are represented in HMIS.

Changes in capacity should be communicated, as soon as possible, to the HMIS Lead for incorporation in the HIC.

Best Practice:

Agencies should ensure that all beds are recorded in and enrolled through HMIS, regardless of funding source.

Agencies should act as HMIS ambassadors with HMIS non-participating partner agencies to encourage participation in HMIS and promote data exchange.
<table>
<thead>
<tr>
<th>Action Step Needed</th>
<th>Staff to be Involved</th>
<th>Staff Responsible</th>
<th>Timeline for action</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop Agency Liaison role</td>
<td>Patrick Crosby, ACHMIS Administrator, will draft roles and responsibilities of an Agency Liaison</td>
<td>Oversight Committee (OC) will review, discuss, and finalize the Agency Liaison roles and responsibilities</td>
<td>December 2019 and January 2020</td>
<td></td>
</tr>
<tr>
<td>Identify Agency Liaison</td>
<td>Agency Staff will identify an Agency Liaison and provide contact information to ACHMIS staff at <a href="mailto:HMISupport@acgov.org">HMISupport@acgov.org</a>; Agency Staff will identify replacements upon departure of a liaison</td>
<td>John Noe, ACHMIS DQ Lead, will develop and publish a roster of Agency Liaisons</td>
<td>January 2020</td>
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<tr>
<td>Generate Agency Data Quality (DQ) Reports</td>
<td>Agency Liaisons will generate the reports and ensure that they accurately reflect the agency’s performance.</td>
<td>DQ Lead will collect and review reports</td>
<td>Beginning February 2020, continuing monthly as part of the User Group Meeting</td>
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<tr>
<td>Identify agencies not meeting DQ standards</td>
<td>Agency Liaisons with measures that are out of tolerance will identify projects</td>
<td>DQ Lead will work with Liaisons to identify out of tolerance agencies</td>
<td>Monthly as preparation for User Group review</td>
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<tr>
<td>Obtain explanation for not meeting DQ standards</td>
<td>Liaisons will provide explanations of issues causing non-compliance</td>
<td>DQ Lead will collect issues, analyze for trends and report to Oversight Committee (OC) as needed</td>
<td>Monthly as preparation for User Group review; Quarterly as preparation for OC review</td>
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<tr>
<td>Identify plan to improve DQ</td>
<td>Liaison will develop a plan for improving DQ at the</td>
<td>DQ Lead will identify systemic issues;</td>
<td>Monthly bring change proposals to OC</td>
<td></td>
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<tr>
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<td>project level; may seek support from ACHMIS staff; identify training needs</td>
<td>propose policy changes or clarifications; improve training curriculum; propose workflow changes or provide process clarification</td>
<td>provide process clarification to user community; emphasize workflow issues causing DQ problems</td>
<td>Quarterly highlight improvements</td>
</tr>
<tr>
<td>Identify technical support needs or retraining opportunities</td>
<td>Liaisons identify projects needing focused TA</td>
<td>DQ Lead provide or facilitate additional hands-on support to staff in coordination with Liaison</td>
<td>As needed</td>
<td>Goal is to use proposed modularized Learning Management System tools to retrain aspects of workflow</td>
</tr>
<tr>
<td>Disseminate process improvement or process changes widely</td>
<td>Liaisons identify process issues needing improvement, suggest process changes</td>
<td>DQ Lead gather, synthesize, and present process recommendations to OC; OC consider changes and taken action to approve, deny, or postpone changes; DQ Lead process OC action and publish process changes appropriately</td>
<td>Monthly User Group session will discuss recommendations to provide feedback to OC; OC will review, discuss, and take action on proposals; DQ Lead will incorporate changes into workflow training and publish revisions to the user community</td>
<td>Resources will be updated and maintained on the HMIS Support Portal as identified on the ACHMIS website: <a href="http://acgov.org/cda/hcd/hmis/materials.htm">http://acgov.org/cda/hcd/hmis/materials.htm</a></td>
</tr>
<tr>
<td>Publish system performance reports</td>
<td>Liaisons will prepare agency level reports, review reports, certify that they accurately</td>
<td>DQ Lead will prepare system-wide report, synthesize and incorporate agency</td>
<td>Quarterly OC will review system-wide reports highlighting areas of</td>
<td>OC will determine at which point reports will be made public</td>
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<tr>
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<tr>
<td>reflect agency performance, and forward them to DQ Lead by deadlines; Liaisons will include their findings for areas out of tolerance</td>
<td>findings, and provide reports to OC by deadlines</td>
<td>improvement and reviewing plans for improving areas out of tolerance</td>
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The Agency Liaison is the primary point of contact between the agency ACHMIS staff and ACHMIS Lead. The ACHMIS Lead will close working relationship with the Agency Liaison to validate agency requests for changes in ACHMIS configuration and staffing.

Roles:

✓ Serves as the designated Continuum of Care (CoC) Agency Security Officer.
✓ Serves as the coordinator for ACHMIS privacy and security, and software training.
✓ Serves as the coordinator for Coordinated Entry (CE) training.
✓ Serves as the agency data quality coordinator.
✓ Serves as the coordinator for configuration changes to ACHMIS software.

Responsibilities:

✓ Related to role as Agency Security Officer
  o Ensures that all agency staff that view or process ACHMIS data have current certifications in privacy and security.
  o Ensures that staff are scheduled for and complete annual privacy and security training.
  o Ensures that users are not sharing accounts and not saving passwords on their machines.
  o Notifies ACHMIS Lead of staff departures no later than the last day of employment.

✓ Related to role as ACHMIS training coordinator
  o Requests training slots from the ACHMIS Lead.
  o Ensures that staff are scheduled for and complete annual privacy and security training.
  o Conducts a monthly review of user activity and requests inactivation of licenses inactive more than 90 days.
  o Requests modification of user access privileges.

✓ Related to role as CE training coordinator
  o Request training slots from the CoC CE coordinator.
  o Ensures that staff are scheduled for and complete annual CE training.
  o Requests modification of user licenses to facilitate CE.

✓ Related to role as data quality coordinator
  o Attends monthly DQ review meetings with ACHMIS Lead.
  o Prepares monthly DQ reports with drill down reports, as necessary, for discussion.
  o Analyzes DQ shortcomings to identify workflow issues, policy revisions, training needs, and technical support needs.
  o Provides or coordinates supplemental agency training for project variations.

✓ Related to role as configuration coordinator
  o Coordinates with ACHMIS Lead to ensure that projects are configured correctly.
  o Reviews project configuration for changes and updates.
  o Serves as a central contact with ACHMIS Lead for periodic reporting requirements.