

Region 7 Transcript – RHY-HMIS Upload Training

Right. We're going to get started here in just a few minutes, a few housekeeping items as we watch our attendee list come up and make sure we start on time, or a little bit after time, and also with as many folks as signed up for the session.

The way to interact with us as we're going through this presentation today is to enter a question in the Q and A panel. So, if you don't see that panel on the right hand side of your screen, you can find the little question mark with a square around it button on your WebEx screen. Click that the panel will show up and then you would type your question into the little box there, and choose All Panelists. I'm gonna go ahead and pull up my list and make sure. But we have folks logging on it now one past, so I think we can probably get rolling. So great. Okay.

Yeah, I think we're ready to go again. Use your Q and A button. We'll do a little more housekeeping here, but welcome. This is the Runaway and Homeless Youth, Homeless Management Information System Grantee user training.

You all are region Seven, or you don't have to be region seven to be here, but this was the time we set up for region Seven, so welcome and let's get rolling.

It's going to be about a fifty minute presentation. Thuan and I are going to go back and forth between the two of us will save lots of time at the end for Q and A. We will also answer questions all the way through as we go.

So, again, use that Q and A panel on the right hand side of your screen, make sure you are selecting all panelists when you submit your question.

If I'm talking, Thuan answer If Thuan is talking, I will answer and we will get everything answered before the hours up that I hope. We're going start with a brief message from Resa Matthew, she's the director of the division amounted license development and support for FYSB and she wants to welcome you to the training. So here we go.

Hi, everyone, I'd like to welcome you to today's fiscal year 2020 RHY HMIS data upload webinar. I want to take this time to commend all of you as our RHY funded grantees for your efforts in serving youth experiencing homeless in your program especially in these unprecedented time and for collecting data over time that is so important to strengthening and funding our programs to prevent and end youth homelessness. I definitely know that it takes a lot out of you to collect data from youth, enter the data into your local and ensure data is at the highest quality.

Region 7 Transcript – RHY-HMIS Upload Training

We appreciate the work that you do to provide better information on behalf of these youth, who are and much need of your services. I would also like to express my gratitude to those individuals, because consistently work behind the scenes to facilitate the data output process and provide the data to FYSB. Gloria Watkins, who served as FYSB, RHY HMYS coordinator and the Abt team under Lori Hunter's leadership has done a phenomenal job. Thank you for all your help and all of that you do.

In today's webinar, we will cover why we need to collect data from youth served in your program, how to collect these data, what data should be collected. What are expected of you as funded grantees as part of the data upload a walkthrough of how to upload your data and read your data quality report generated once you upload your data and then how to get technical assistance and support. With that I will now turn it over to Mary Schwartz and in doing so I wish you all much success in your data upload for this fiscal year reporting cycle.

Great. So I'm Mary from Abt Associates and Thuan Huynh is with us from Abt Associates as well. And in the background, we have Tommy Joe Bednar. He's helping out with any of the tech support issues that come in and help the customer answer questions. Jeanne Goodman from Abt also helped us there for a second. So thanks everyone and let's get rolling.

So we're going do an overview, right? Thuan will walk through user rules, account, management, security, privacy, protocols, scripts and repository slots. I'm going walk you through the uploading process itself and some data quality reporting, and how to manage your uploads.

We'll talk a little bit about the reporting available to use by Grantees and how to get our assistance once we get started in this process.

So, you all know already that you're legislatively mandated, right? To collect data in HMYS and report it to FYSB. So, some of the uses of the data, once you've uploaded your files to FYSB, they use the data to measure the effectiveness of RHY programs to inform the design of future changes and funding decisions, to provide data to the federal project officers for monitoring purposes, and of course a regular report to Congress to ensure that FYSB continues to get funded to ensure the RHY program continues and your clients can get served. But more importantly, we think then all of that is that the data needs to be available to you, at a team use locally and understand your own program design, some client outcomes and how to best serve your client. So, with that in mind and we'll show you a little preview of the RHY HMIS dashboard. One of the big pushes here with this new data upload system is making sure that the data is accessible to you.

Region 7 Transcript – RHY-HMIS Upload Training

And as, you know, in years past data has been uploaded twice a year. We do about six months, every six months cycle, and six months' worth of data for that fiscal year would go in in the spring. And then you'd finish out the fiscal year of data with an upload in the fall. We're only doing one upload this year and that's because of this change from the old RHY HMIS upload system to this new one that we're going to walk you through.

But after this, we'll go back to that twice yearly cycle. So, you can anticipate that, after we get through this follow-up loads, it's going to include a whole year's worth of data. We'll go back to the spring and then fall upload and it's about six months of data each time we upload twice yearly.

If all of this does seem really foreign to you, maybe you weren't participating in a HMIS already locally and maybe you're a new RHY Grantee and you haven't got signed into HMIS might have been collecting data. Hopefully, that's not the case, but just to kind of help you understand HMIS. It's not something that exists nationally. HMIS is implemented in each continuum of care. HUD places the responsibility for HMIS as CoC and HMIS leads to make sure that the federal partners like RHY that require their grantees to use HMIS. The HMIS leads get dates from RHY users train, get the access to the system, and teach them how to enter their data correctly set up the workflows and everything that's required of them from their fund sources.

So, if you have any questions or need some help locally with HMIS, your first line of defense is going to be going to that local HMIS lead to understand the local implementation of HMIS of your community.

As a reminder, you know, your job is to make sure client data stay safe. HMIS helps you do that in a couple of ways. Usernames and passwords and all the things you learn when you get access to HMIS are all security measures in place to protect the client data that goes in. You don't have to obtain consent according to RHY for entering client data in HMIS or submitting the data via this upload process to FYSB.

Those uses of data locally don't require consent. However, if you're in an HMIS Implementation where data are shared across providers and different organizations, and your community log in HMIS can see each other's data. You're in that kind of data sharing partnership, consent, then becomes required. So you'll need to make sure your clients have a way to inform you, whether they consent or not. If they're minor clients, they need to have the parents sign consent to them.

Region 7 Transcript – RHY-HMIS Upload Training

If they're not minors themselves, the youth themselves can sign. The method of consent is determined locally. So, it could be written. It could be verbal. It could be, lots of people do like E, signature stuff right now with COVID amongst us. So just whatever, the again, CoC lead, HMIS lead all of the local leadership around your HMIS, implementation will determine the method of consent, and it should all be written down in the privacy policies and available to you as you ensure that you are following all of the requirements and protecting client data as required.

Okay, final note before I pass it over to Thuan. I just want to point out that this is kind of technical stuff here, but you may or may not be the person who's going to create data files HMIS, you may or may not be the one who extracts the data from HMIS. When you're ready to upload to the RHY data upload system we're about to show you

If you are, this is the kind of technical requirements that we expect to have followed.

This is all written up in CoC specifications. What, 256- hashed means all of that is really clear in the in the specifications that HMIS leads get. It should be already programed for you to be following these rules for RHY uploads.

We're asking an extra level of, we want a naming convention on everybody's files this time around so that we can match for technical assistance and for your purposes to help in your effort process kind of adding things like grantee ID, RHY program name, the project type of the data. You've extracted report period. That you're uploading for we're going to try and get people used to this naming convention.

So that the files that are uploaded to the system can kind of be matched up easily with the data that lands in the database. If you're not the person that pulls the extract this file, the slide is meaningless to you, but we're going be.

I haven't sent this yet, but we will absolutely be sharing the slide deck with everyone one dollar trainings across all the ten regions are done here. I think at the, after the end of next week, before we go live, you're going to have access to this slide deck.

A user manual wants to help support and this is just a way to try some parameters to extracts that come out of each of HMIS. So, either this makes perfect sense to you and you're on board with me and what I'm saying here or you're going to take this information and pass it onto your HMIS

Region 7 Transcript – RHY-HMIS Upload Training

leader, the person in your organization, who does exports before we get to the upload period and with that I'm going to pass the ball to Thuan.

Alright, thank you so much Mary and hello good afternoon everyone. I want to extend my appreciation for your participation and today's training.

Alright, so as a reminder, this webinar is to train. All RHY grantees on the new RHY HMIS repository. In previous years HMIS data was uploaded twice a year to the RHY Point data portal right. RHY Point is no longer being used and the RHY HMIS repository replaces. RHY Point. All uploads will now be completed through the RHY repository.

The repository will launch at the beginning of September, because the repository is brand new. We'll have two testing periods to identify and resolve any bugs with the system before the official launch.

So HMIS lead and vendors will have an opportunity to test the system. August 10 through August the fourteenth. RHY Grantees will have an opportunity to test the system August 17th through August 21st. Emails will be forthcoming about these two testing events.

And as Mary mentioned, there's only one upload this year, and it will be this fall for grants with performance, period ending in 2020. Meaning your grant is ending this year the data upload will be from September 7th through September the 25th. For grants not ending in 2020, data will be submitted from October 26th through November 16th. If you unsure, what is the period of performance for your grant? Please check with your federal project officer.

In the new repository, there are two user types for each organization. We have grantee user and granting manager. The grantee user can upload data and do reports. The granting manager has more functions available to them in the repository. They can upload data. They can view reports. They can add or remove users from the system for the agency, and they can add project specific information. That is essential for the data upload.

We'll go over this specific function in more details in a few more slides with the new repository as well.

Region 7 Transcript – RHY-HMIS Upload Training

Your federal project officer will have access to the system, and they'll be able to view the data and the reports for all the, for all the grantees within their region. So the new repository has security and privacy protocol that must be followed all users must complete and submit a user access request form in order to have an account in the system. If you're a grantee user, who is only responsible for uploading data and doing reports, you will need to have your agency's grantee manager, sign your request form. So, the grantee manager is the person that is the grantee administrative official, or what is otherwise known as the authorizing representative for your organization. So, if you're the grantee manager, you will also need to complete the user access request form so that you have access to the repository as well. You need to have your request form, signed off by your federal project officer. Your FPO will sign on the form where it says ACF/FSBY system owner and the grantee manager account box.

So, the, the user access request form includes the rules and behavior that you agree to and sign off on the form. In addition to the form everyone must complete a cyber security awareness training within the last twelve months, and submit the certificate of completion with the user access request form.

Each and every time a user logs onto the repository, There'll be a two factor authentication process. This process means that each user will be sent a six digit code to either their email address, a text to their mobile device, or a phone call to a number that does not have an extension. So this, the six digit code must then be entered into the system within ten minutes of being received.

So, this is just a screenshot showing where, and the repository you can edit and change how you received the six digit code. It's going to be under your user profile again. The method of delivery can be through an email address as a SMS message to a mobile device, or a phone call to a number without an extension.

So, as I previously mentioned, each agency has a designated Grantee manager. One of the function of a grantee manager have in the system is to set up the correct grant drop down option slot in order for data to be uploaded to the correct project as part of the data upload process that Mary will cover in a little bit. Users must choose the correct grant information from a drop down box.

So, on the left hand, side of the slide, you can see this drop down box where it says selected grants. The information for this drop down box must be completed by the granting manager for your agency.

Region 7 Transcript – RHY-HMIS Upload Training

Alright, so how will the grantee manager complete this information? Grantee managers will go into the repository they'll click on projects, then they'll click create new this will bring up the screenshot showing on the right the grantee manager will then need to enter the project name, project type, and organization's name, then select the grant under which the project is funded.

So a couple of additional things to note here, there should only be one flag for each project type. Each upload should contain only that project types client data.

The name of the project in the RHY HMIS repository should help a grantee user remember what files upload to that slot matching it to the HMIS project that you extracted from is the best choice to ensure data quality.

So, again, in order for a grantee manager to complete this function for the data upload to happen, they must complete a user access request form so that an account can be created for them so that they can have access to the repository.

Grantee managers are considered to be a privilege user because they have more functions allocated to them within the repository. So Grantee managers can execute the following privileged functions that a regular user cannot. They can create a new user, new grantee user accounts. They can view, edit, and lock unlock grantee user account. They can remove grantee users for their organization. Then they can create and edit project type organization and associate a project with a specific grant, they can also view grants within their organization as well.

So, all users must only use their accounts for authorized purposes, especially grantee managers as the privilege user before providing grantee users and creating new accounts. The grantee manager must confirm the identity of the grantee users confirmed that the current users are using a work email address and not a personal one. Confirmed that the grantee users completed and signed the user access request form, the rules of behavior, and also confirmed that grantee users completed their general security awareness training within the last twelve months, and make sure that the users will take the training annually as well.

So here are some additional security, best practices for grantee managers to consider when creating a new grantee user account. It's important to set a username that easy to remember does not contain any sensitive information such as the user's social security number does not contain any common names such as admin or user. They should avoid punctuation. Only grant access to

Region 7 Transcript – RHY-HMIS Upload Training

users that need access to the information system never create user accounts that are not needed new users should, and will only be giving the level of access they need to perform that RHY HMIS immediately notified the right agent service desk when a user's leaving or no longer needs access to the RHY HMIS agent repository. Never share information from RHY HMIS with an unapproved party. Did you suspect that any data within the system was lost, changed or disclosed to an authorized parties or something is not working as it should contact the RHY HMIS service desk.

Alright, that takes us to the next section and I'm going to pass it back to Mary.

Great thanks Thuan. Okay. So just to recap what we've learned so far and make sure we're all the same place in this process. So, we've been collecting data in HMIS for the full fiscal year. We've exported data to a CSV file according to the nomenclature rules that we established. You, the grantees, have submitted account request to the RHY HMIS to my service desk and all your required documents and certificates have been completed and filled out along those along with that account request form. This is everyone, because it's a new system. Even if you have access to the other one, you have to do that. Grantee managers, also folks on the phone have also filled out their account request, been approved by their FPO's and they've since logged into the new system and added all the right upload slots to the repository.

And here we are at the point that we're ready to upload our first files.

So, we're going to log in and it's going to ask you for that username and password that you get from filling out those user access form. At this stage, you get sent the code and that will be sent to either your phone as a text message, or your office phone that does not have an extension on it, or to your email account. It only last for about 10 minutes. As soon as your press your username and password into the system, it will send that code and you need to type that code in here at this screen for two factor authentication which then logs you into the system and this is basically what everybody is going to see when they login. Grantee managers again have a little bit more access but essentially you have the ability to create a new upload, see past uploads you have already done, and get access to whatever reporting you would like to look at.

To create a new upload, you click create a new upload. Then drag and drop a file or you select a file. That file again, is that extracted CSV file that you've saved locally to your machine. You'll match that up with the correct grant that your grantee manager set up for you in the repository. Which is essentially says I have been funded by FSBY to serve the street outreach project so the grant will say street outreach and should probably have your grant number etc.

Region 7 Transcript – RHY-HMIS Upload Training

Your client file data from HIMIS contains all your street outreach clients that you served for the year, and that's what the screen looks like. So it's kind of a series of steps are going on here. You select the right file.

You select the right grant, you match those up and you press upload at this point, you get these spinning circles and it goes through three steps. It's going to look at your file that you uploaded and make sure it meets all the standards of the CSV specifications and those are things your HMIS lead/HMIS vendor should know all about. And this should already have been done. I mean, we've been uploading these CSV files for a while now so most of the vendors on board, they're going to get like Thuan said, an onsite a test period next week to kind of make sure that their files are up to up to snuff.

So, this process should be fairly straightforward for all of you. It then moves to the step of looking at the data itself.

So, for each project type, that you serve each kind of grants that you have for RHY there's certain data element requirements, and it's going to look at the data that you have in your file, and make sure that all the formatting is correct the data elements, all the stuff that's required to be in there is in there and then it's either going to reject or accept your upload, assuming it passes all the tests it'll accept it.

You'll still be able to see a data quality report on the data that was accepted into the database.

So those three green checkmark means your file was good enough to come into the database and be added to the dataset that ultimately goes to FSBY. if you are at that stage.

So kind of the last thing to do then with your successful file is to review your data quality and look at your scores against each of the elements that are identified as required for you for your type of project that you've uploaded to score one hundred percent is excellent. It should be the goal, but there are perfectly acceptable reasons why you wouldn't have a score of a hundred percent. Right? There are reasons but there are don't knows and refuses in some of these data elements are completely valid.

You would just document those locally in your case files and move along a score of seventy five percent or lower is like. You need to pay attention to that. There's really not a reason why you

Region 7 Transcript – RHY-HMIS Upload Training

should have data quality that low. It didn't keep you from uploading the data, but we need you to improve the data and get it to a better spot and get as close to that hundred percent as you can.

So, that will be your final step of your upload process after you get a successful upload and an accepted upload, you'll work through the data quality improvements that you can make in your data set.

That's usually means going back to HMIS and fixing data that's missing. Or what have you.

And re-exporting and re uploading each time you upload a new file, you'll get an updated report as to your score. Now it's possible, and it might be probable, at least our first go around that you don't get those three green checkmarks. Instead you get a rejected message, which looks like this, what you see on the screen, it'll be the, the red circle with the X in it.

Again, we'll need to check why you've got a file rejected and that data quality report will tell you why but before we go there Thuan:

I'm going to walk us through briefly what the requirements are, where they come from whether data element requirements are for HMIS uploads

Okay, thanks Mary before I jump into data quality, there's one question that I want to bring up so that we can talk a little bit about it. So, the question is, is there anything different the grantee manager needs to do set up to upload for grant program into two CoC's. No, there's nothing different going on. Basically if it's a single grantee we've kind of walked through the scenario single grantee.

Who, and two CoC's, meaning, I'm assuming two different HMIS's are being used to deliver services and record the data on the single grant. There's going to be a way to set up as many upload slots as you need. I would imagine that means and that the user, the grantee or the grantee is able to access the export files from each of those different CoC's, each of those different HMIS's.

So, it's just as many CSV exports as you anticipate needing to manage as a grantee is how many upload slots you would set up for yourself so the repository doesn't care that slot a is CSV one

Region 7 Transcript – RHY-HMIS Upload Training

and, in slot B is CSV two. Like, that's not a necessary level of detail that comes through in the CSV files of the client data itself. And we can kind of sort that out on the back end of the database. But as a grantee manager, you do need to understand how many of those different extractions you're going to need to manage. Okay. Alright. Thanks. Mary.

Alright, data quality:

So for the right program, the reporting expectations and HMIS data element requirements are defined by FSBY and RHY program office staff in the graphic shown the three document HMIS data standards, RHY program HMIS manual, and the CSV programming specifications outlined data expectations and defined data quality standards for RHY Grantees. So more specifically FSBY and RHY program office staff set the data element requirement from the list of available options in the HMIS data standards, data map, data standards, define the data collection points, applicable projects, definitions, and programming of the data elements and the HMIS implementation locally.

CSV specification dictate how the HMIS data standards pulled into the upload based on the RHY data element requirement. So what are the HMIS data elements required to be collected by the RHY Grantees? Elements are called universal data elements (UDE), these data elements are required to be collected by all projects participating in HMIS, regardless of funding source.

This means that these data elements must be collected by all RHY program all RHY projects in HMIS. This slide and the next one which show what these universal data elements are please note that these data elements should only be collected and entered once. Only one per client record, there should not be multiple records with the same name, and the same social security number data entered in HMIS should be unduplicated data.

So, again, more universal data elements such as project start day project, project exit date, and destination one quick note about a specific data element. For data elements 3.15 relationship to head of household. Each, unaccompanied youth is a head of household. That would be called self. A youth with a child or with children they are the head of household and the child or children, is part of the head of household child. Youth presenting together such as siblings of partners with each be considered their head of household. The next set of data elements that must be collected, by the RHY program are the programs specific data elements so these data elements are designed and managed, by at least one HMIS federal partner program. Some of the program specific data elements are collected across most federal partner programs, these are called common program specific data elements.

Region 7 Transcript – RHY-HMIS Upload Training

So as the chart shows, the project type will define, which of these data elements would be collected unlike the universal data elements. So, for instance, data elements, 4.12, current living situation, and 4.13 data engagement, only collected by street outreach projects and not by the other project types. The next set of data elements RHY program specific data elements. There are twenty of them. So these are what I call, like, to call the RHY series of data elements. Again these are just data elements outlining being outlined that are required to be collected by project type.

So this was just a brief overview of these element data elements required to be collected by all RHY grantees.

The charts we have shown you up for your reference only. As an HMIS user, the data elements should be automatically set up for you in your local HMIS implementation. The project type should determine the local HMIS workflow. So when you're entering data into HMIS, you do not have to refer back to these tables to determine which data element must be collected for your project type.

Okay, that takes us to CSV specifications and then pass it back to Mary.

Thanks Thuan,

Okay so there are fourteen files required in a CSV extract file and those files have very specific names of each of those files contain some mix of all the data elements that Thuan just went through from the universal elements to program specific to the right data elements.

There are different files in the CSV that correspond to each of those elements and that's what, you know, I think if I want you to walk away with anything that will help you understand the data quality process of the upload error messages you're going to get is that the RHY repository this new HMIS upload database that you're going to upload your files to it cannot reach in to your local HMIS to see what's there.

The CSV files are the in between, between your data entry and data collection in HMIS locally and what the RHY repository can see as far as your data quality. So, it's within these fourteen files that the data elements either are complete or aren't complete, or are of the right format, or

Region 7 Transcript – RHY-HMIS Upload Training

aren't in the right format and all of that is defined by the CSV specification. And that's what the error messages from the RHY repository are going to be written, because that's all we have we can't reach into what it's called locally for you. And each HMIS, it just has to be what's in that CSV file that we can see.

So, again, this is kind of technical stuff. This is not your wheelhouse and somebody else relies on the does all the technical stuff for you locally. I mean, that's. that is fine.

And this recording will be available on the RHYTTAC website and the slides will be available and it can be part of the technical assistance that we support to help folks to understand what these error messages are. It's also very likely you're going to need to engage retries either HMIS lead or HMIS vendor.

Because they are very technical, especially in the actual implementation that you have locally at HMIS. And they're the only ones, the HMIS vendors are the only ones that can really fix if there's a specification problem with your CSV files.

But what you can see in the CSV specification is that you have a data element number a column header name that aligns to that data element. There's the type field, which tells the system that you're uploading data to what the data should look like for that field. There's a list of values, so each HMIS data standard right? Race, ethnicity, gender, those things you fill out each have valid responses, and each of those responses in your local HMIS correspond to an actual number, according to the CSV specification.

So CSV files, when you open them up, one, just looks like, crazy series of integers basically and dates and it's sometimes hard to read. But these lists allow you to kind of walk back to what the data standards say the value should be. Then. There's a way to specify if a field can be empty or no means and then any notes that go along with that field.

So that's like the, the CSV specifications that HMIS vendors look at to create these files to be able to export data from your HMIS and put it into the CSV files to be handed off to whatever federal partners asking for it whether it's RHY, VA, etc.

So, why I wanted to point that out is because you're going to get error messages if you get to that point. And just to remind you, we're back to that point, where we did an upload with the file that we created from HMIS and we didn't get three green checkmarks, we got a red X, and that means

Region 7 Transcript – RHY-HMIS Upload Training

that something's wrong with that file and you'll need to walk it back either to your local HMIS, and fix the data quality errors that occur in there or is the problem with the file itself that you need to have some help from your HMIS vendor to fix it.

So you have three reports that you'll be able to see if you get that red X the three reports are data files, data validation and data quality. I have them highlighted here. They're kind of like tabs.

They all live in the HMIS/RHY HMIS repository under the reports tab. At any time you want to know what your data quality is for that file and extract it and stored in Excel locally. So you can show it to your HMIS vendor for help with these error messages. So, you can do that by pressing the export button.

And so, let's walk through each of those reports available to you, they all three come out into the export. So you can again share the error messages with anyone you need to.

They don't have to have a log into the repository to see what the problems are with your file in the data files report. You're going to see kind of a volume assessment of your CSV file. So we see this a lot where you've extracted the CSV file and stored it locally, but somewhere along the way, the parameters that you used for that CSV file extract, weren't set correctly. Maybe the date's wrong. Maybe the projects wrong. Maybe the grants wrong, right?

Any number of things go wrong as you're extracting the data from each HMIS and so if you get to the data files tab and see that, there's all zeros, zero client files are found, zero enrollments are found. It's going to show you those fourteen files. How many records the system can see in your CSV file and you're going to want to do an initial kind of is that how many is that? Like, generally how many clients should be in the client CSV file that should generally matched to how many clients you served this fiscal year. So, if you're seeing ten and you actually served a hundred and ten, there's something off in the size of that CSV file and that's what that data files report is telling you.

Second report is data validation. So, data validation takes each field, each value, in your CSV files and matches it back to those CSV specification to make sure that it fits all those standards that it should fit in order to be considered valid and to be added to the repository. The database that will ultimately go to FSBY with all this data in it. We don't want to get into the habit of putting bad data, right, in our side so this data validation is so that of looking and making sure that each of the data that you've put in that file are correct according to the specifications. So let

Region 7 Transcript – RHY-HMIS Upload Training

me walk you through a quick example file that there's an error message value has the wrong date format.

So when you see these validation error messages, you're going to have a personal ID that aligns to each message. And that personal ID is actually the same ID that you would use to look up that client in HMIS locally. So you could take the personal ID right away.

If the first thing you do with these error messages without having to understand each of them and details is to go and look at that HMIS ID locally and see what the client record says in HMIS and fix whatever you can there and re export and re upload that might fix this message or it could be something that you have to walk back to the vendor in this error message, for example, DatetToStreetESSH needs to be in the date format and the CSV specification identify date format to be exactly the four digit years, a dash, the two digit month, a dash two digit day, but you can see from the error message before. That it's not in that format and so that's what the error messages about is that the CSV so, 4, 1, 2017, it may perfectly be the right information that you put into HMIS when you looked at that personal ID of 22, 22, you saw that that is the right date that you put in the data isn't missing.

There's nothing wrong with it from your age or my HMIS local perspective but that data doesn't match the specifications that it showed in the CSV file, so that's what this error messages and that's what a lot of error messages will request or there are formatting issues in the data that you've extracted. It could also be that it just says value as missing values missing means. It wasn't, it's not even in the file at all. We can't even find it so that again, there's just going to be a number of error messages that you get. So all have an HMIS ID attached to them. So, that you can either look back in HMIS and see if you can fix it there or you may have to export these data quality reports and work with your HMIS vendor to get the error fixed.

You can re-upload as many times as you want in this opening of September 7th to 25th for that first round and folks whose grants are entirely ending in this years or October 26th through November 16th,or something like that. You know so you have these big chunks of four weeks of time, three weeks of time to do as many do you need to get things fixed you want to get in there early, though, get in at the start of the period,so that you get to use those for three weeks to go back and forth.

You may have to log a ticket with the vendor. You may have to work with your HMIS lead to get time on their calendar. Right? You may have to work with your staff to go back to HMIS actually do some clean up in the local HMIS data collection process. There's a lot that could be happening to have your files get rejected and your responsibility is to get to those three green

Region 7 Transcript – RHY-HMIS Upload Training

checkmarks as soon as possible in the upload process so that you can spend the majority of your upload time working to get to those hundred percent scores, which coincidentally is the third and final data quality report you have access to. Once the data's able to be added to the repositories, and we can assess the quality of the data itself, don't know's refuses missing are all part of what goes into your score.

So, the, the work all the way up until the repository closes is just to get a successful file and have it be as close to one hundred percent high quality as you can.

All right, thank you Mary. Just a quick reminder. That that was a lot of information. So if you have any question at all, just typing your question in the Q&A. We'll have about ten minutes near the end to answer everyone's questions. Alright. Accessing resources. And assistance, so one available resource is the RHY HMIS dashboard.

So the RHY HMIS dashboard if you're a long time grantee it's been available for years. It's going to be at the same website address, so it's not it's not something new the dashboard allow grantees and RHY federal project officers to visualize grantees data, compare that data against other programs and target. They can share data and they can also easily insert specific data fields. Into reports, so the dashboard has grant level data as well as state regional and national RHY HMIS data.

So it's a great way to look and run reports on your, your specific project or program. And also, if you want, so you can compare with what, what with what you're doing with what's going on within the state within the region or nationally as well. And then you can also do a historical trend analysis, because there'll be several years of data that will be available to you on the dashboard as well.

So available resources, additional resources include the RHY HMIS data collection guide. So that is something that both Mary, and I are completing and finishing up and has to be reviewed. It has to be a made final, like, compliant and all that. But this guide will be your, should be your go to guide as far as, when you're going through this upload process, it will have step by step instructions and screenshot.

That will help you navigate the new HMIS repository to wherever you upload your data. We'll also have a RHY HMIS data frequently asked questions so with all the trainings we're doing,

Region 7 Transcript – RHY-HMIS Upload Training

and with all the questions that are coming through the RHY HMIS service desk, we're going to gather all those questions and we're going to create sort of a quick go to guide of the frequently asked questions, so that will be another resource for everyone to access as well.

So, you also have the live program HMIS manual for those who are more technical that's going to be available. You can always find that on the HUD exchange website. So, the web address, you see there on your screen.

And as far as the data collection guide, and the frequently asked question guide, it's all going to be posted onto the RHYTTAC website as well. So unfortunately, the two web addresses, you see on your screen or not hyperlinks you can't click on them, but these addresses will be available to you once the slide deck is made available and posted to the RHYTTAC website as well.

Alright, so here are our contact information both Mary and I have so you have our email addresses along with Gloria Watkins, who is the family and youth services bureau RHY HMIS coordinator however, even though we're giving you our contact information, our email addresses always go to the online service desk.

The RHY HMIS service desk is that if you have questions, you need help with anything. It's because this is where we can monitor and keep track for this be all the questions all the systems that is being provided to you guys. So, that we can properly report back to FSBY, be all the work that we're doing, and any potential issues that are coming up. So, along with the online service desk, that's also a one eight hundred number to call.

If you have an issue accessing the, the service desk, and then the second portion of this on the slide again is the, the RHYTTAC website. So that's not new. So it's going to be something that's still going to be available. This is where I'll have the recording, and the slide deck will be posted along with the guidebook and the frequently asked questions as well.

Alright, with that said, question and answer do we have any questions? I don't see any. You guys are being awfully quiet that means that you are going to be aces when it comes to uploading your data.

No. Service desk tickets will come in from region seven. I'm sure of it.

Region 7 Transcript – RHY-HMIS Upload Training

Yeah, I mean, maybe just go back to the RHY HMIS service desk dot net website Thuan and we'll just kind of hammer home until the hour is up.

How important is to kind of use this www.RHYMISServiceDesk.net. I often mess it up by not including the H in there and between RHY. And miss, but it does not have the H, service desk dot net.

And that is really your first line of defense.

So, I guess if you are having trouble with the upload process, once we go live with the upload system, you know, we all know uploading a years' worth of data. That's a lot of data quality issues to address all at once. We're really anxious to get back to that to upload the year process because that gives you to take the data quality issues, rather than just one for the year. But this is what it is this year. So please, please get in there early. As soon as it's time to start the uploads and you get the messages from us, but the upload process has opened and please upload your files and do that as soon as you can. Because three weeks is going to go by real fast.

If you have a ton of data quality issues to resolve, or your files are uploading correctly or you have to work with your each HMIS lead or HMIS vendors to get programming changes, then for the files to upload correctly. It's a big a big job on your part. So that the RHY HMIS service desk is also where you be submitting your user access request form. So, this again, just to reiterate this is a brand new system.

Everyone is beginning at the starting line. We will all have to complete the user access request form. We will all have to sign off the rules of behavior we will all have to complete some sort of cyber security awareness training that will give you a certificate and all those documents would need, will need to be submitted to the RHY HMIS as a service desk, so that an account can be created for you for you to upload your data for your organization and then just to remind everyone again for each agency.

There's going to be a grant... There'll be two user type grantee user who can upload data and view reports. And that's all that, that the functions that they can have within the system and then grantee managers. We have more functions and, you know, you know, they're sort of like, at the administrative level so they have more functions within the repository. They can upload data. They can do reports they can add or remove grantee users. But this is the new function in the system that was not available to you guys before the, with this the system grantee managers can add additional users. Once we, once the system has been launched. So, if someone leaves, or if

Region 7 Transcript – RHY-HMIS Upload Training

you realize that you need another person in the system to upload the data, grantee managers can then add those users for you without you having to go to the service desk. And then, additionally, everything went through as far as adding project specific information to the grant. So that the upload is successful. One thing to note.

So, just because there's two, there are two user types available for your agency, you can just have one person as the designated grantee manager, and they can upload and the reports and all of that. So it's not necessary to have the two people with two accounts within the system. We, we always recommend that. You have at least two people. So that, you know, someone has access to the system.

That we have one question that came in, so I'm going to answer it in writing too,

Basically we, this training is available for anyone we mentioned in on the in the HMIS lead call.

So, if you know of any of your each my HMIS leads want to attend. There's still a few training left on our schedule is if we have two more left this week and three more next week. So there's still an opportunity for five more trainings.

And anyone can attend shortly if you feel like this is information, that's going to be useful to your HMIS leads, please go ahead and invite them again. Where you mentioned the RHY upload process on the last stage nicely called.

Probably mention again in the August call, and again in the September call them again until October call, just to remind that this HMIS leads that this RHY upload is happening, and they need to be responding to addressing RHY grantee concerns through the upload processes. And in addition, the vendors, HMIS vendors are getting the information this week for the testing process will occur next week for HMIS centers.

And you can, if you receive that email about the training with the initial registration links, you can send, you can forward that to your HMIS leads and they can click on that same link for to register for any upcoming training.

Alright, I don't see any more. Let's see. Questions coming in.

Region 7 Transcript – RHY-HMIS Upload Training

Any other tips or comments Mary about the reports there.

I mean, no, I think, you know, if you want to launch the training again, once you get on there, feel free to do that that might be helpful. Definitely the RHY manuals that we put together, but will correspond with the upload process and all the tips and tricks. We've talked about here and applied screenshots and examples and it also will have a condensed version of the specification as an addendum to that RHY manual. So, you don't have to go, look in fourteen different places if you're somebody who wants to understand and try and, like, really dig into the details of the data quality reporting. It'll all be there for you in the manual stuff.

Katie, last questions. Hp doesn't equal prevention. But they still upload a blank report to show they have no one in it. No. So that's like, grantee manager role is to just set up only set up the slots that you are serving with your grant.

So it's not like, everybody have to have a prevention slot to upload data to if you don't do prevention and you have no data upload. Just don't set up that slot.

So that the grantee managers need to set up all the slots for however many exports you're going to have by project type, but there's no kind of minimum number of slots. That's going to be different for each grantee.

Alright, I don't see any more questions then we have less than a minute. So I'll say we call it.

I say so too Thuan good job. Thanks, Tommy Joe on the back end and thanks everybody for listening to us. Today. We will for you on the help desk. Very soon. Thanks. Everyone have a great day.