DATE: March 24, 2017
TO: LAHSA Commission
FROM: Pada Lee, Project Manager; Josh Decell, Associate Director, Data Integration
CC: Peter Lynn, Executive Director; Chris Callandrillo, Director of Programs
SUBJECT: Monthly Update on Homeless Management Information System (HMIS) Migration

Purpose
This progress report provides a status update for the Homeless Management Information System (HMIS) Migration Project that the Los Angeles Homeless Services Authority (LAHSA) is overseeing on behalf of the Los Angeles (LA), Glendale and Pasadena Continuums of Care (CoCs). The details of this monthly report are summarized below in five broad categories:

- **Overall Project Updates**
- **HMIS Governance and Community Input**: Items relating to engagement, input, and feedback from the service provider community, governing bodies, and other system partners, as well as general status updates.
- **Data Migration**: Items relating to data analysis, data cleanup, data conversions, and system configuration to ensure data is migrated completely and accurately and users find the system easy to use and reflective of programmatic workflows.
- **HMIS Reports**: Items relating to re-building custom reports in the new system and re-mapping dashboard linkages that are currently aligned with Adsystech HMIS and its data structures.
- **User Training**: Items relating to revision of training materials, as well as scheduling and logistics to train all users in the new software.

Background
In May 2016, LAHSA released a Request for Proposals (RFP) to solicit applicants to serve as the LA CoC HMIS software provider. In September 2016, following a community-driven scoring and evaluation process, the LAHSA Commission approved the community recommendation to contract with BitFocus to use their product, Clarity Human Services, as the LA CoC HMIS. Subsequent to that decision, the Glendale and Pasadena CoCs approved decisions to move with LAHSA to the same HMIS software provider. The resulting HMIS Migration Project encompasses the LA community’s efforts to create the most effective data collection and reporting system for the community of homeless assistance service providers.

This current month’s updates are detailed in the charts that follow.
**Project Updates as of 03/24/2017**

<table>
<thead>
<tr>
<th>Overall Project Updates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Targeted Launch Date</strong></td>
</tr>
<tr>
<td>LAHSA is targeting to “go-live” with Clarity by 5/15, with user trainings beginning by 5/1. All users trained by 5/12 will have access to Clarity by 5/15. The trainings will be extended to 5/19 to ensure that all users have access to the system upon launch.</td>
</tr>
<tr>
<td><strong>Migration Site Launched</strong></td>
</tr>
<tr>
<td>LAHSA officially launched a central site for all HMIS Migration-related news and materials on 3/20. You can visit the website at: <a href="https://www.lahsa.org/hmis/migration">https://www.lahsa.org/hmis/migration</a></td>
</tr>
<tr>
<td><strong>SPA Lead and Agency Preparation Check List Available</strong></td>
</tr>
<tr>
<td>LAHSA has created a check list to help prepare the community for the migration. Using this tool, the community can coordinate and track their progress in preparing within their own organizations.</td>
</tr>
<tr>
<td><strong>Working with the Glendale and Pasadena CoC HMIS Leads</strong></td>
</tr>
<tr>
<td>The three CoC HMIS Leads have reviewed the HMIS policies and procedures and have drafted a first set of revisions. The draft adjusted language and references to the LA/OC HMIS Collaborative and Adsystech HMIS. This first draft will continue to be reviewed in the coming month by the Leads for any additional changes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HMIS Governance and Community Input (Status: On Schedule)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workflow Demonstration with the Community (On Schedule)</strong></td>
</tr>
<tr>
<td>• LAHSA, with assistance from United Way, will convene a demonstration of the proposed user-end workflow within Clarity on 3/30.</td>
</tr>
<tr>
<td><strong>Program Eligibility Information (On Schedule)</strong></td>
</tr>
<tr>
<td>• LAHSA will be phasing in program eligibility criteria into Clarity. The team has begun gathering criteria for LAHSA-funded programs and Permanent Supportive Housing programs and will be expanding to other programs post May implementation with input from the community.</td>
</tr>
<tr>
<td>Finalizing Varying Levels of Access (On Schedule)</td>
</tr>
</tbody>
</table>
| Data Migration (Status: On Schedule) | • LAHSA and BitFocus have completed the first round of review and testing of all HUD standard data and targets to perform a second round of review with a test migration by 3/27/2017.  
• LAHSA has created a corresponding data quality plan to work with the community on cleaning up data in preparation for the cutover from Adsystech HMIS.  
• Over the next month, LAHSA will continue to work with Bitfocus to analyze the 700+ custom data that were sent and create a data migration map. Through these efforts, the project team will establish a cut-off date for Adsystech HMIS and the corresponding blackout time between systems. |
| Data Elements Analysis and Cleanup (On Schedule / Delayed) | • LAHSA HMIS Team created a unified user-end workflow in Clarity that aligns with how clients actually move through our CES across populations.  
• The project team has met with System Team and community members to gather feedback on the proposed workflow. The workflow is streamlined and simplified so that much of the basic navigation concepts apply across different types of users.  
• This workflow will be presented at the demonstration meeting with the community on 3/30/2017 for final tweaks. |
| Program Configuration Templates Completed | • LAHSA HMIS Team created standard templates for program configuration in Clarity, which are used to create programs in the system for the migration. Using these templates, 1,200+ programs’ information will be migrated and mapped to the new system by next month. |
### HMIS Reports (Status: Delayed)

**Re-development of Reports in Progress (Delayed)**
- LAHSA HMIS Team has identified and prioritized the most-used and mission-critical custom reports in the current HMIS for re-development in Clarity.
- Technical Specifications are being drafted with continued focus on compliance and CES reports to ensure that both LAHSA and our community continue to meet contractual obligations and the immediate needs of persons experiencing homelessness.
- In the next month, development work will begin using these specifications for delivery by 6/1.

**Existing Clarity Standard Reports and Ad-hoc Reporting (On Schedule)**
- LAHSA has projected at least one (1) admin-level user per organization who will have access to ad-hoc reporting, which is easier to use for in-depth analysis and complements the pre-packaged Clarity reports and custom reports LAHSA is re-developing.
- LAHSA has asked each agency to identify the admin-level user in preparation for the May implementation.

**Re-development Plan and Timeline for Dashboard Linkages Complete (On Schedule)**
- LAHSA has created a timeline and identified sub-teams that will re-create the linkages to all public facing dashboards. All dashboards will be updated prior to the cutover from Adsystech HMIS and updated again in June once linkages are re-created and tested in the new system.

### User Training (Status: On Schedule)

**Targeted HMIS Training Courses Outlined (On Schedule)**
- LAHSA HMIS Team has created and outlined the training courses for the May re-training. Using this outline, the HMIS Team is drafting materials for targeted trainings.
- Three (3) tracks have been identified to target different user audiences that require differing levels of emphasis on certain sections and customized scenarios and examples, while still following the proposed unified workflow mentioned above.
### Streamline Access to Training Website Testing in Progress (On Schedule)

- LAHSA has completed merging the training website login credentials with the main LAHSA site (MyOrg) on 3/22 to reduce the confusion that comes with managing multiple user accounts and passwords.
- The merged site is being tested and is projected to be online with the final training schedules in on 4/3. All active training site login credentials that match will be migrated over and others will be contacted to create a login in the LAHSA main site.
- All users will be able to start registering for scheduled trainings on 4/3.

### Internal and Lead Trainings Coming in April

- LAHSA HMIS Team will begin training for internal teams and SPA Leads in mid-April.
- The training will give the LAHSA team and leads an opportunity to learn the system ahead of their user community to address basic questions about key features and provide the training team valuable feedback on their delivery of the trainings.

Please contact Pada Lee at [plee@lahsa.org](mailto:plee@lahsa.org) for any further information.

**Attachments**

- HMIS Migration Monthly Update (Presentation)