

ATA Meeting

MAY
5/27/2026



Agenda

- IDHS Reporting
- HMIS Quarterly Spotlight
- HMIS Training Updates
- Data Archiving
- Project Performance Report
- Upcoming Dates
- Questions

IDHS Reporting

- Projects funded through IDHS can now run a dedicated IDHS report in BusinessObjects. We have made an alternate version of the DFSS Quarterly reports that providers can use.
- These reports are not dependent on a DFSS model or the Chicago model
- Running the IDHS Reports in BusinessObjects article available on the Helpdesk
 - <https://hmis.allchicago.org/hc/en-us/articles/49615479900564>
 - Step-by-step walkthrough of generating the report
- The IDHS report in BusinessObjects is not a 1:1 match to the IDHS repository. Depending on the project type and the specific fields required during submission, you may still need to gather or confirm some information outside of this report.

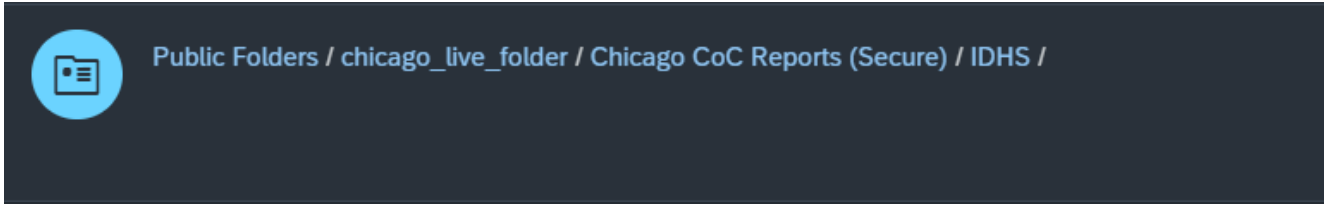




IDHS Reporting

- Reports can be found in the new IDHS folder

Public Folder -> chicago_live_folder ->Chicago CoC Reports (Secure) -> IDHS

- IDHS Carryover Details
- IDHS Quarterly Details



Title	Type	Last Updated
 IDHS Carryover Details v2026-4	Web Intelligence	Apr 21, 2026 11:48 AM
 IDHS Quarterly Details v2026-4	Web Intelligence	Apr 21, 2026 11:48 AM



HMIS Quarterly Spotlight

- HMIS Quarterly Spotlight is a new quarterly webinar series focused on reinforcing key HMIS processes that impact data quality and reporting. Each session will revisit a specific topic, especially areas where we're seeing common questions, inconsistencies, or opportunities for improvement across the system.
- Webinar will be open to all HMIS users (not limited to ATAs)
- Email links to register will be sent to all active users ahead of each session
- Each session will be recorded and available on the Helpdesk for ongoing reference



HMIS



HMIS Quarterly Spotlight Annual Assessment

- This first Quarterly Spotlight session will focus on Annual Assessments in HMIS. We'll walk through how to complete Annual Assessments correctly so that client data is accurately captured and consistently reflected in reporting (APR).
 - June 10th at 1 pm

<https://attendee.gotowebinar.com/register/2207450368299881304>

Related Updates

- Annual Assessment Report (HDR-57) has been updated to reflect the correct annual assessment date for additional household members
 - Annual Assessment article is available via Helpdesk
- <https://hmis.allchicago.org/hc/en-us/articles/48947963022484>



HMIS Training Updates



Review of HMIS Access Request Process

1. Training and user profile **requests** are made **through forms**
2. Learner(s) and ATA receive **confirmation from Help Desk:**
 - a. Course enrollment –
 - a. This may happen a day or two before a confirmation is received.
 - b. Training account
 - c. Training credit(s) count
3. Learner(s) complete the following LMS courses:
 - a. Introduction to HMIS
 - b. Data Management
 - c. Project-Specific course(s)
 - d. HMIS General Access Training - Final Steps Instructions
4. Learner(s) sign up for and complete the **Sample Client Assignment**

[Steps to Receiving HMIS Access – 2026](#)
[Talent LMS HMIS Training Progress](#)



Signing up for the Sample Client Assignment Waitlist

The registration form is located only in the **HMIS General Access Training - Final Steps Instructions**.

- The user and the ATA will receive a copy of the registration form.

Completing the form does not guarantee placement on the waitlist.

- **Eligibility requirements** of completed courses:
 - Project-specific course within 3 months
 - Introduction to HMIS or Data Management course within 6 months

Next Steps - Keep an eye on the [HMIS Sample Client Waitlist](#).

- If eligible, no further action.
- If not eligible, notification and next steps will be sent to user, ATA, and listed supervisor



Sample Client Assignment

2025 Virtual Proctored Sessions

- 2302 Tickets
- 503 Requests sent out
- 19.7 Average days from course completion to first submission
- 1002 Sample clients reviewed from 413 Users
- 326 Passed users with an average of 2.4 attempts in 10.2 days

Old Process

Self-registration with automatic approval

Self-paced with no restrictions or expirations

1:1 meetings available by Help Desk coordination

2026 Training

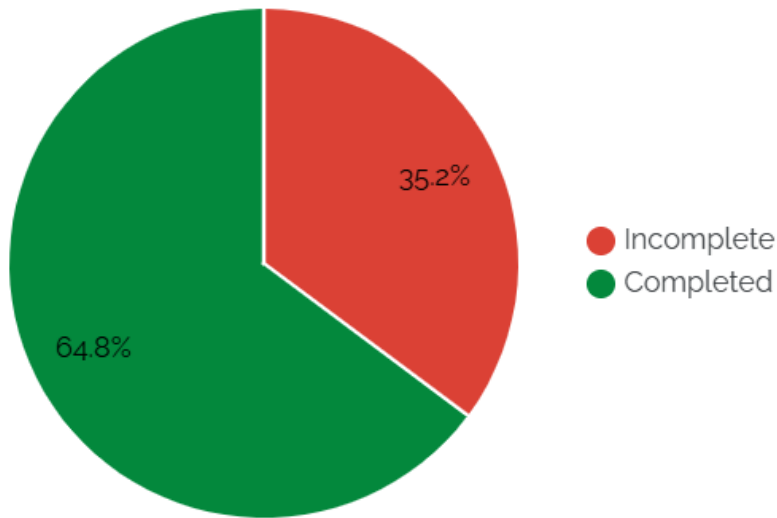
Self-registration with eligibility requirements

Limited capacity cohorts with a waitlist

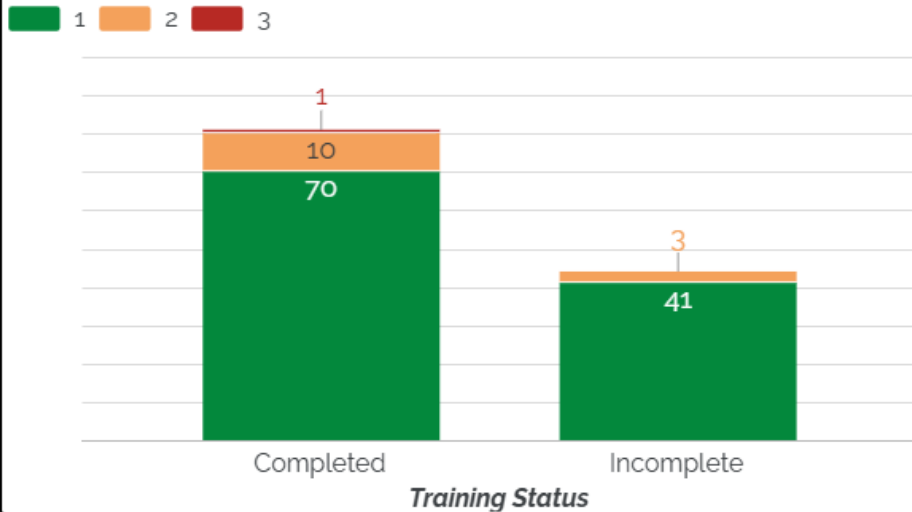
Pre-set weekly Office Hour and 1:1 appointments for current cohort



Training Status by Record Count



Record Count by Training Status and Times on the waitlist



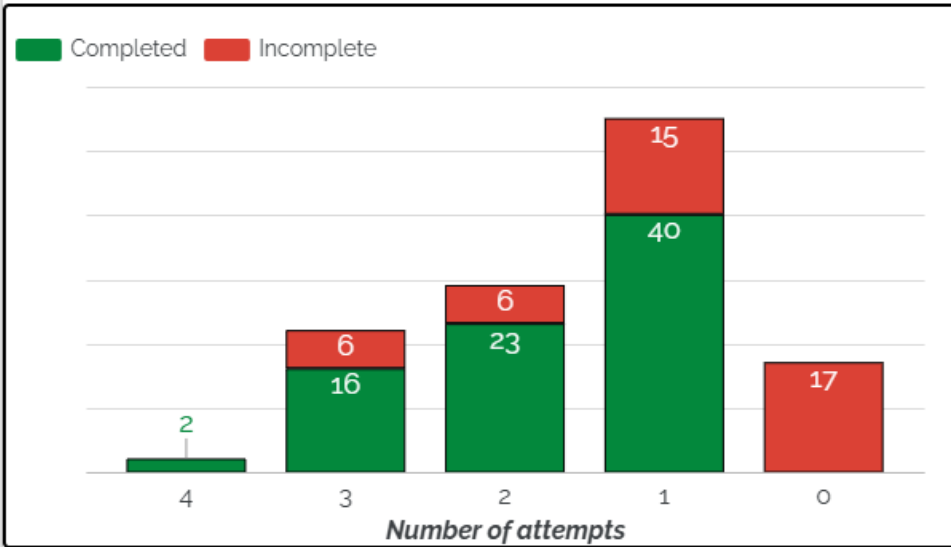
Total = 127

Notes:

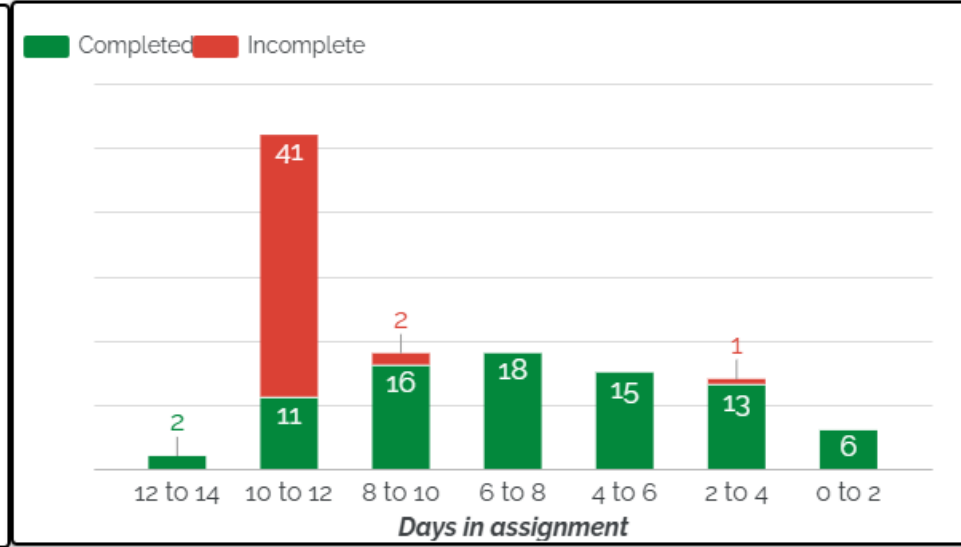
1. 2/3 of all users admitted into assignment are completing and receiving their access
2. Of those users that completed the assignment, 86% are on their first turn on the assignment.



Distribution of Number of attempts



Distribution of Days in assignment



Data Last Updated: 5/22/2026 5:13:31 PM | Privacy Policy

Total = 127

Notable Stats:

1. More than half incomplete assignments only submit a sample client once or not at all
2. Many incomplete assignments use all 10 days



Sample Client Assignment Reminders

When added to the assignment:

1. Notification sent to learner from Talent LMS
2. Teams invite sent to learner, ATA, and listed supervisor for Office Hour the following week

Assignment limits:

- **12** users at a time
- **10 day** expiration
- **3 attempts** per turn
- After expiration, users must re-register to be re-added to the waitlist

Resources for Cohort:

1. Feedback to user links to Help Desk articles
2. ATA and/or supervisor -
 - Office Hour on Wednesdays at 11a
 - Link to book a 1:1 in the Feedback and Office Hour invite



General Training Reminders

Training Credits

- Counts are offline temporarily, available for request
- Quarterly Invoices
 - Will be sent during the week of DQ processing
 - Next set of training will be invoiced the week of June 8th



Data Archiving

- In alignment with the 2004 HUD HMIS Data and Technical Standards, HMIS leads are required to develop and implement a plan to dispose of or remove identifiers from Personally Identifying Information (PPI) that is not in current use 7 years after the record was created or last changed.
- The HMIS Committee voted to move forward with stripping identifiers and archiving client records that have had no HMIS activity for 7 years, so those records are no longer identifiable. To implement this, the HMIS team will update the HMIS Privacy Policy and begin working with WellSky on the data archiving process.

Next Steps for Providers

Since eligibility is based on 7 years of no HMIS activity, agencies should use this time to ensure the HMIS record reflects real client engagement:

- Make sure active clients are actually active in HMIS. If your agency is still working with a client but the record hasn't been updated in years, that client could be incorrectly flagged as inactive.
- Pay special attention to long-term clients. If a client has been served over a long period (7+ years), confirm the record shows ongoing activity so it is not included in the archiving process.



Data Archiving

Data Entry Expectations

- All clients are required to be enrolled in your project within 48 hours.
 - <https://hmis.allchicago.org/hc/en-us/articles/115005664926>
- Children born during a family's enrollment in your project must be added to that enrollment no more than one month after their birth
 - Children must be added to an existing enrollment, so they do not appear as Child Only entries.
- Clients due for Annual Assessments must have these completed within 30 days prior to or after their enrollment anniversary date. Annual assessments done outside of this time frame will not pull into reports such as the APR.
- Clients housed in PH must have a Housing Move-in Date added via an interim update. Ensure that the date is added to the Housing Move in Date Question. The interim review date will not count.
- Clients should be Exited from HMIS once they are no longer receiving services from your project.



Project Performance Report (PPR)

- The PPRs provide calculations of CoC-defined metrics to assist programs with monitoring outcomes. They can be used to highlight successes and areas of improvement.
- PPRs can be requested twice per quarter by visiting the [All Chicago Project Performance Requests Webpage](#) and submitting a [Project Performance Reports Request](#).
- Program-Level and Client-Level data are included in the reports for detailed review. Please follow all data security measures as outlined in your agency's [HMIS Agency Participation Agreement](#)
- Agencies must have their ATA request the PPRs. If your organization requires another party to request a PPR, please follow up with All Chicago at projectreports@allchicago.org.



Project Performance Report (PPR)

Linked Resources:

- [Project Performance Reports Methodology Guide](#)
- [All Chicago LMS Project Performance Reports Webinar](#)

Further Questions?

Please email projectreports@allchicago.org and we will be happy to assist!



Upcoming Dates – Data Quality

- **June 8, 2026 – June 19, 2026** Q1 2026 (1/1/2026-3/31/2026)
<https://attendee.gotowebinar.com/register/4476883047177778005>
- **September 14, 2026 – September 25, 2026** Q2 2026 (4/1/2026-6/30/2026)
<https://attendee.gotowebinar.com/register/6717901050458496858>
- **November 9, 2026 – November 20, 2026** Q3 2026 (7/1/2026-9/30/2026)
<https://attendee.gotowebinar.com/register/2584304678020805717>

Dates subject to change, registration links will remain.



Upcoming Dates – ATA Meeting

- July 29th – <https://attendee.gotowebinar.com/register/2072707414443890782>
- September 23rd – <https://attendee.gotowebinar.com/register/2384321104383536732>
- November 25th – <https://attendee.gotowebinar.com/register/2807145997426205272>

Dates subject to change, registration links will remain.



Questions

