ATA Meeting

July
7/29/2026

Chicago
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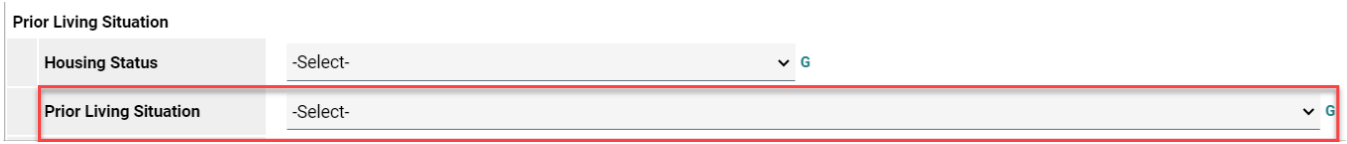
of Care

Agenda

- Prior Living Situation
- HMIS Training Updates
- HMIS System Updates
- Two-Factor Authentication
- Helpdesk/HMIS Feedback
- Helpdesk Metrics
- Upcoming Dates
- Questions

Prior Living Situation Impacts Project Eligibility

We are seeing enrollments where the client may be eligible for the project, but the Prior Living Situation (PLS) selected in HMIS makes the client appear ineligible for the project. The PLS should accurately reflect the client's most recent living situation at project entry, while still considering the broader context of where the client has typically been staying. This is especially important for projects that require Category 1 or Category 4 homelessness (PSH/RRH), because an incorrect or overly narrow PLS response can make an otherwise eligible participant appear ineligible in HMIS.



- A one night stay with family or friends may not fully represent the client's actual housing situation or eligibility.
- The selected PLS response in HMIS and supporting documentation should tell the same story about why the client is eligible for the project.

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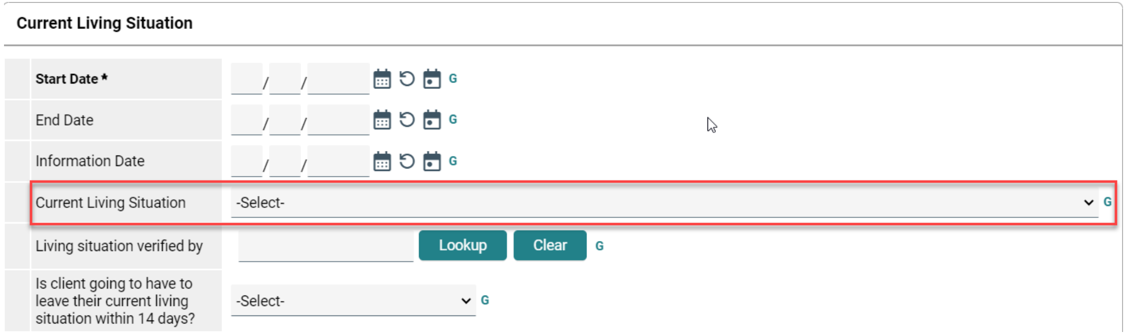
Prior Living Situation vs. Current Living Situation

Prior Living Situation and Current Living Situation both describe where a client is staying, but they are used for different purposes in HMIS. PLS looks backward from the project start date and should describe the living situation the client is coming from at enrollment. CLS captures what is happening at the time of a specific contact and may be updated multiple times as the client's situation changes.

- **Prior Living Situation** should reflect the client's most recent living situation connected to enrollment and eligibility.
- **Current Living Situation** documents where the client is at the time staff are interacting with them and may change from one contact to the next.



HMIS Training Update

New HMIS Training Team Member

We are excited to announce our new HMIS Training Coordinator, Shannon Bell!

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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

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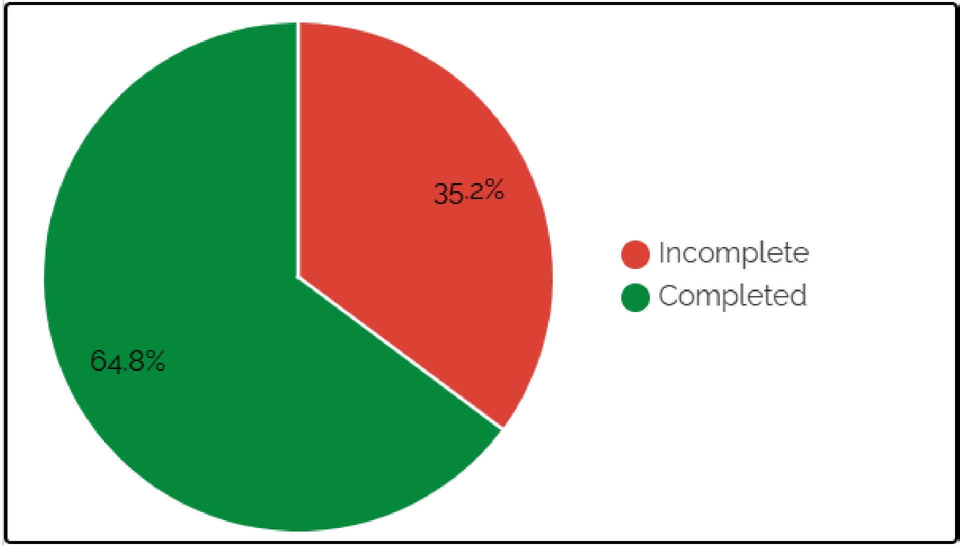
Transferring HMIS Access

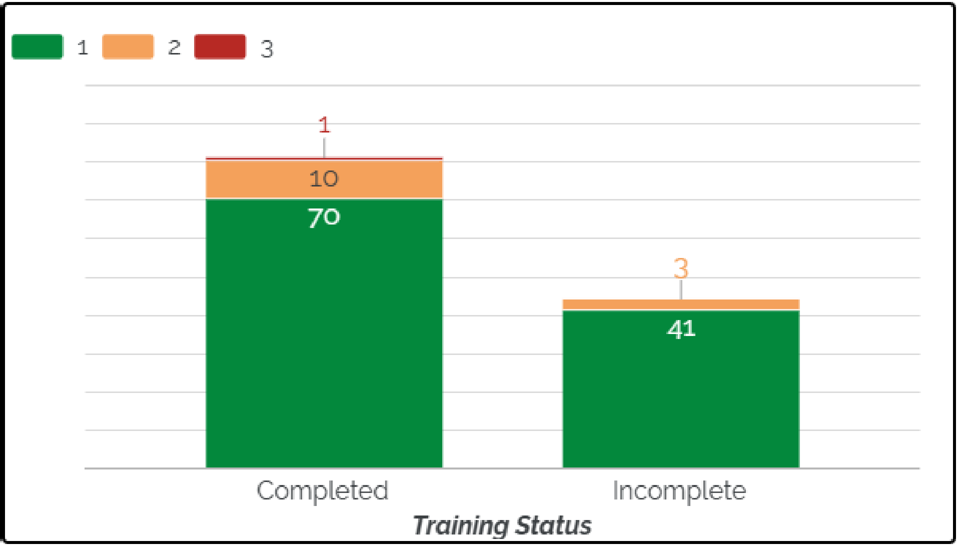
- HMIS access can be transferred between agencies when it meets the following criteria:
    - Within the Chicago CoC and
    - Currently have access to the HMIS or was active within the last 6 months
    - Have verifiable, corresponding training in the LMS

- If all of the above applies to the existing or previous HMIS access, please note that access to Housing, Outreach, and PATH-funded projects require separate training and sample client:
    - If you will be working with the same project types, then you are eligible for a full transfer of access, bypassing all additional training.
    - If you will be working with different project types, then only the project-specific course and sample client is required. Please note that course requirements have changed as of January 2026.
    - If you (or your user) do not meet the requirements, then the full HMIS training will need to be completed.

Training Status by Record Count



Record Count by Training Status and Times on the waitlist

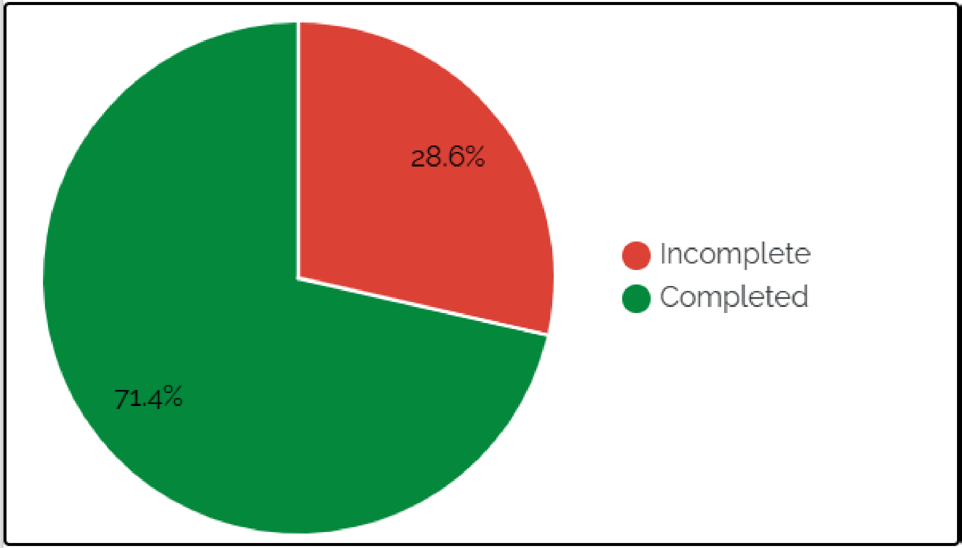


Data from Jan 29th to May 22nd
Total = 127

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.

Training Status by Record Count



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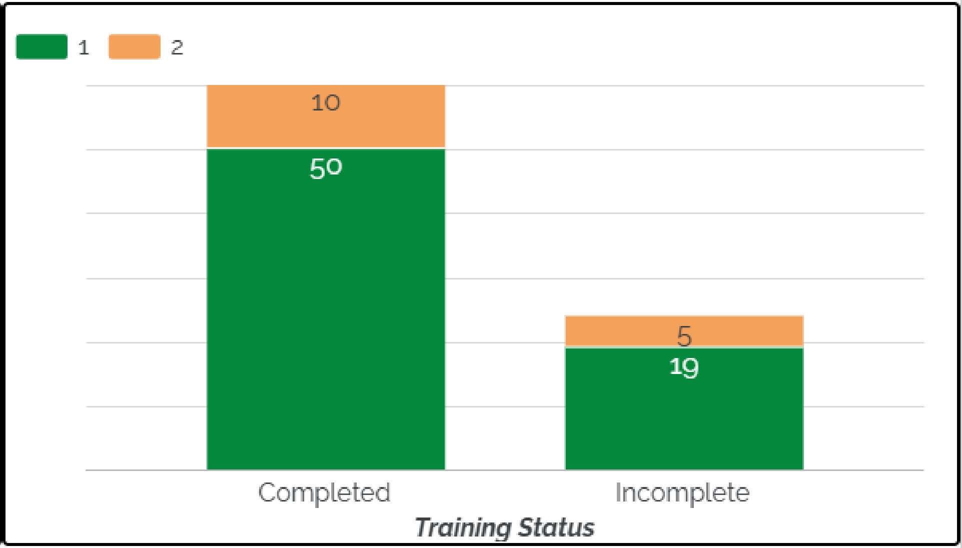

Data from May 24th to July 24th
Total = 85

Notes:

- Increased percentage of users admitted to the assignment are receiving their access
- First attempt completion rates remain about the same

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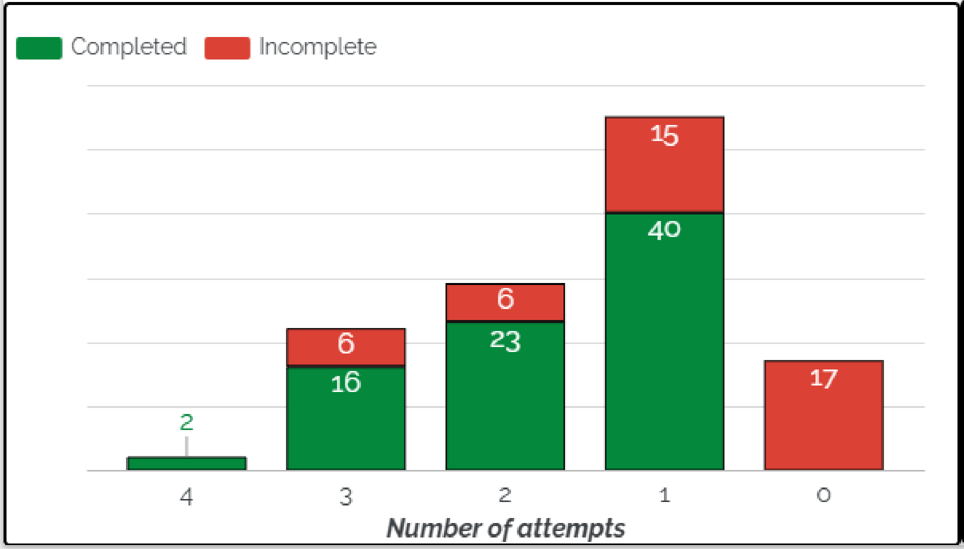
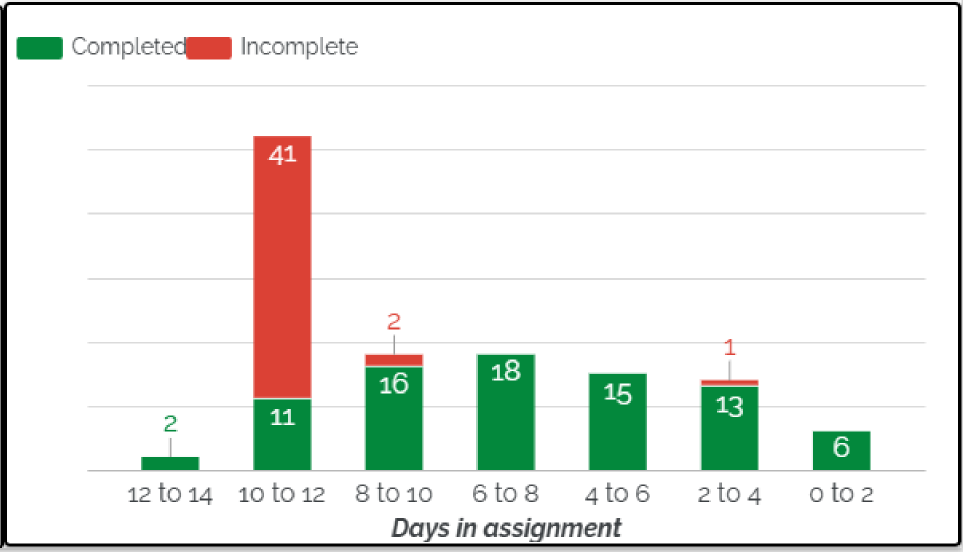
Distribution of Number of attempts



Distribution of Days in assignment



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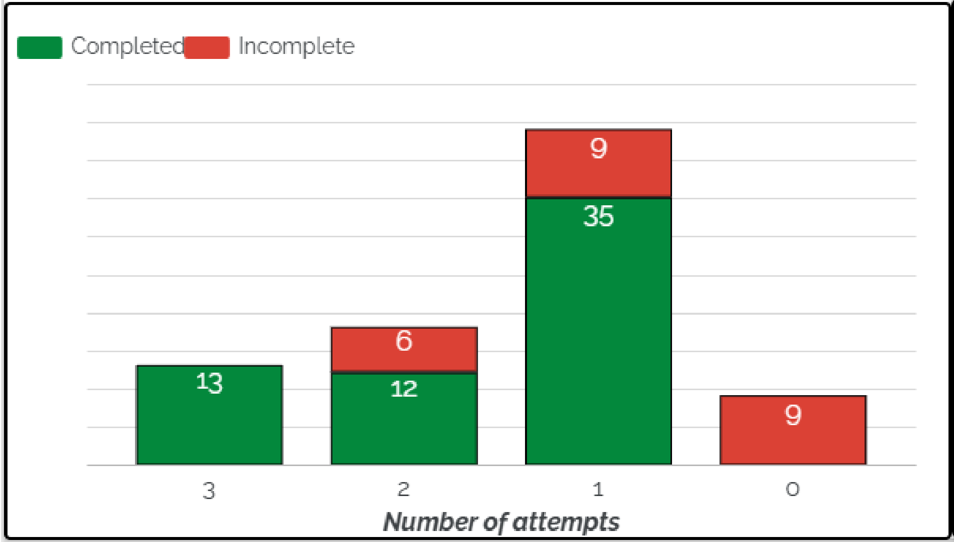
Data from Jan 29th to May 22nd
Total = 127

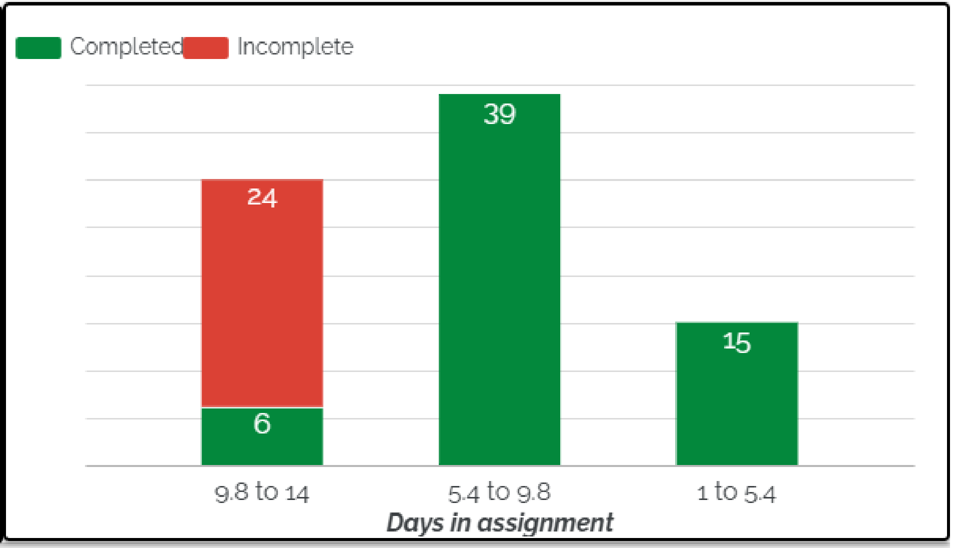
Notable Stats:

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

Distribution of Number of attempts



Distribution of Days in assignment



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Data from May 24th to July 24th
Total = 85

Notes:

- Decreasing percentage of incomplete assignments that only submit a sample client once or twice

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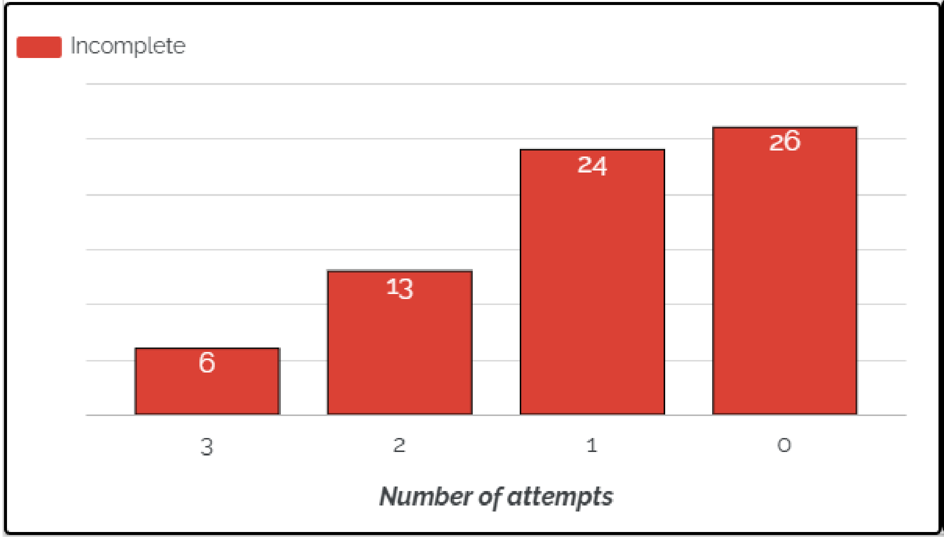
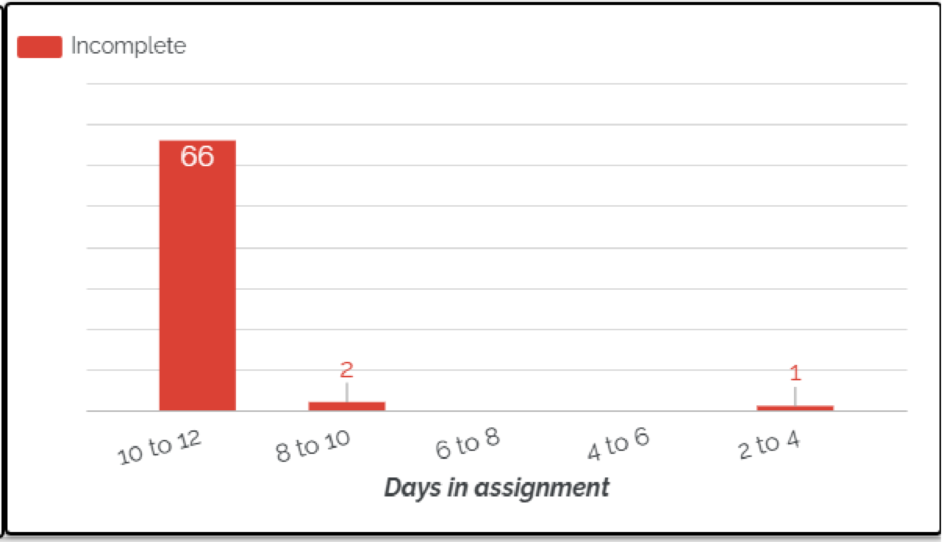
Distribution of Number of attempts



Distribution of Days in assignment



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<u>All</u> incomplete attempts
Total = 69

Notes:

- Almost all incomplete attempts used all 10+ days without an attempt or attempting only once

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HMIS Sample Client Waitlist

1. Users will continue to follow the steps to be added to the waitlist.

2. Upon admission to the Sample Client Assignment course, users and listed supervisors will receive first notice:

   1) An automated notification from Talent LMS to the user

   2) An office hour invite for the following week to the user and listed supervisor

3. After 3 days of inactivity, the user will receive another automated reminder from Talent LMS.

Sample Client Waitlist – Protocol Update

4. After 5 days of inactivity, users will be placed on a probationary hold for 5 days.

    a. These users will be removed from the assignment, and the next user(s) on the waitlist will be added to the assignment to take their place.

        i. The user will receive an automated notification from Talent LMS about the removal.

        ii. The user, their ATA, and any other listed supervisor will receive notification from the Help Desk about their removal and next steps.

    b. During this time, the user remains at the top of the waitlist. The user and the agency has 5 days to confirm receipt and intent to continue with training.

        a. If confirmation is received within 5 days, then the user is added back onto the assignment when the next available spot opens up.

        b. If no confirmation is received, then the user is removed from the waitlist and must re-register to be added back onto the waitlist.

    c. Users may only be placed on probationary hold once. If they fail to begin their assignment within 5 days a second time, they will automatically be removed from the waitlist and require a re-registration.

General Training Reminders

Waitlist Probationary Hold Protocol

- Will apply for any user added **on or after August 10th**
- Expect a reminder sent to ATAs with reminders the morning of

Training Credits

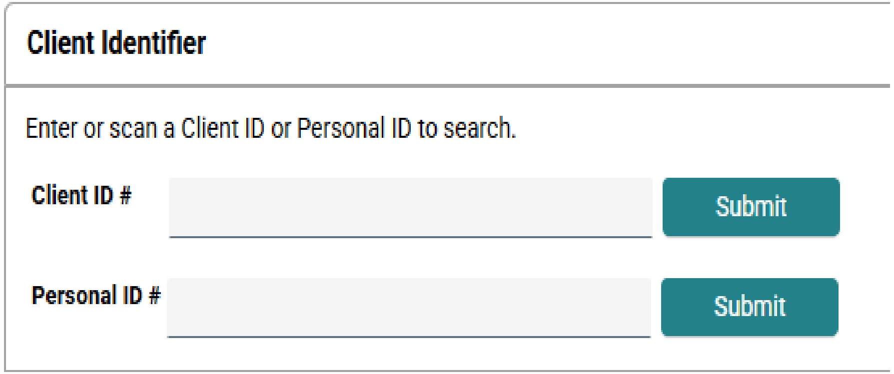
- Credit inventory is back up and available on the Help Desk article: Paying for HMIS Training and Requesting Credits
- Quarterly Invoices
  - Will be sent during the week of DQ processing
  - Next set of invoices will be sent the week of September

HMIS Updates

- HMIS was updated on 7/13 with new features

<u>Personal ID Search</u>

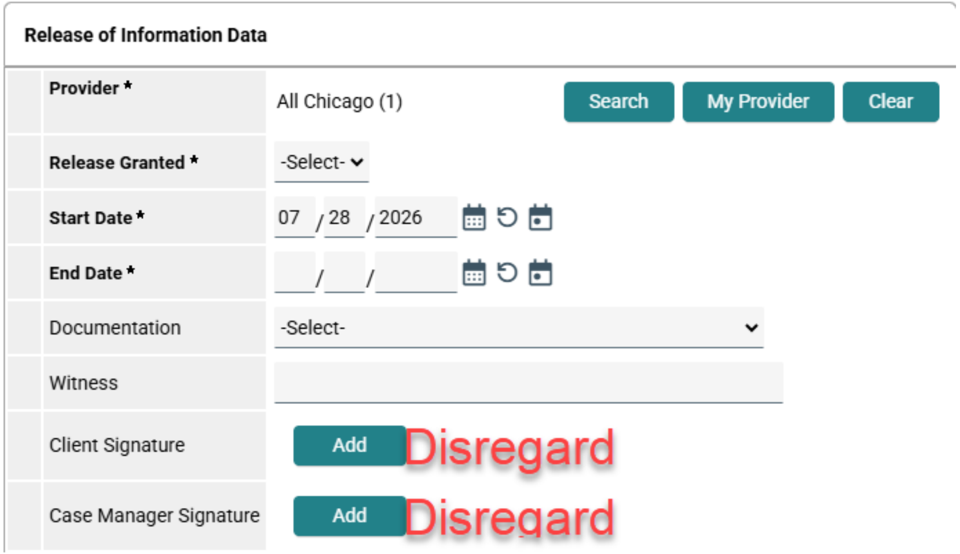
- HMIS users can now search for clients via the Personal ID field in Client Search
- Since EVA no longer uses client ID you can now use the Personal ID from the report to search in HMIS from Client Search



HMIS Updates

Release of Information

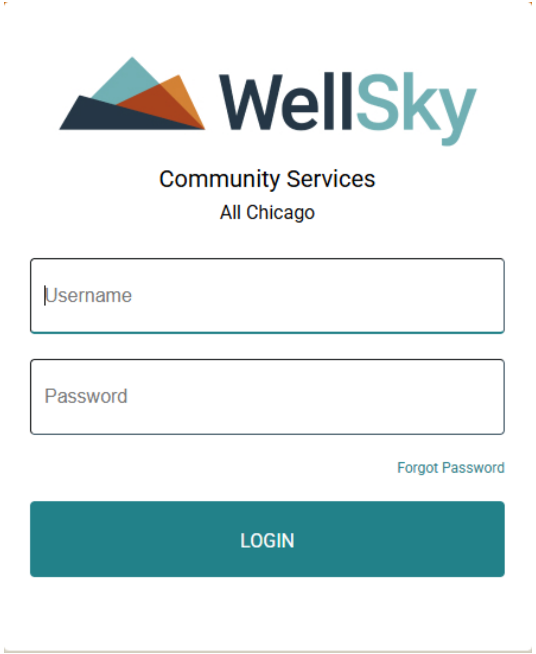
- Update includes new signature fields, which are currently marked as not required questions.
- **At this time, these fields can be disregarded**. We will follow up in the future with how these fields will be incorporated into the workflow



Two-Factor Authentication

WellSky will soon be rolling out a mandatory two-factor authentication process for HMIS login. As part of this upgrade, users will begin logging in with the email address listed on their HMIS account instead of their current HMIS username. This change is tentatively planned for September, and we expect to have more details in August, when we will host a webinar to walk through the new login process for all users.

- Users will have multiple verification options. Options may include email verification, text message, an authenticator app (Okta), biometrics, or a security key.



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HelpDesk/ HMIS Feedback

The HMIS team is gathering feedback on a variety of HMIS topics over the coming months to better understand what the community needs and what improvements would provide the most value. You may have already received, or may soon receive, a survey invitation regarding the Help Desk experience. If you have the capacity to complete these surveys, we encourage you to participate.

- HMIS HelpDesk Survey – 2026
  - https://hmis.allchicago.org/hc/en-us/community/posts/51047186455060

We plan to share additional surveys over the coming months to gather feedback on a variety of HMIS topics.

HelpDesk Dashboard

Beginning in mid Q3, the HMIS team plans to launch a quarterly Helpdesk dashboard using Q2 ticket data as the first reporting period. By sharing this information on a regular basis, the HMIS team hopes to give the community greater insight into the types of questions and issues users are experiencing, identify common areas where additional guidance may be helpful, and support continued improvement in how agencies use the system.

Examples:

- **Ticket Volume and Resolution** – Tracks how many tickets are opened, solved, and when ticket activity is highest.
- **Response and Resolution Timeframes** – Measures how quickly tickets receive a first reply, how long they take to resolve, and how often they are resolved efficiently.
- **Ticket Trends and Submission Methods** – Identifies common ticket topics, agencies or projects submitting tickets, and whether tickets are submitted by form or email.

Upcoming Dates – Data Quality

- **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

Upcoming Dates – ATA Meeting

- **September 23rd –** https://attendee.gotowebinar.com/register/2384321104383536732
- **November 25th –** https://attendee.gotowebinar.com/register/2807145997426205272

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Questions