JUNE 7, 2022, 10AM-12PM

- Attendance:
    - o Committee Members: David Bogdan; James Doyle; Gwen Williams; Jessica Makela; Ari Kisler; Laurie Murray; Lee Trapeni; Linda Amante; Rebecca Gruel; Stephanie Smith; Will Towne
    - o Guest: Stefanie Willett (sitting in for Becca Lewis)
    - o ICA: Karina McNamara; Louise Masterson
    - o Absent: Elizabeth Melville; Becca Lewis; Chelsea Alsofrom
- Software Transition and ICA Update
    - o Coordinated Entry reports are in live site and we are training CE lead agencies this afternoon on the reports
    - o ICA Reporting Team is working on FSH and HOP reporting
    - o ESG – CV Outcomes report – this is due quarterly – we will need to check in with the reporting team on the status of this
    - o Migrated data: Contacts; custom data for CE – status and annual assessments; CE assessments – BoS complex service needs, BoS housing barriers, and Chittenden scores assessment.
    - o Next to be pushed to migration (test site): Files and notes
    - o In process: HOP and FSH custom data
    - o Next to be pushed to live site: custom assessments (SSOMs and UVH assessment).
- Notes Category in Clarity
    - o Some agency requests and would like to come up with a statewide standard as all end users will see the same categories
    - o Standard that ICA initially put in: No Category; Program Note; Coordinated Entry Note
    - o An agency came up with the additional Program Note options: Program note: scheduled on campus meeting; hotel visit; home visit; phone call; virtual meeting; walk-in visit

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    - o Linda expressed a desire to have a 'Housing Navigation / Case Management Meeting' category
    - o 'In Person Meeting' instead of ('on campus'; 'hotel visit'; 'home visit')?- although those are helpful for some agencies.
    - o 'Unable to Contact' category – suggested to be added
    - o 'Housing counseling or Housing Search or Apartment Viewing' - suggested to be added
    - o 'Program note' versus 'case management note'? These may be the same or they may be different – it depends on if the group can determine a significant difference

- o 'Chronic Documentation Notes' - especially useful for PSH track especially for Chittenden.
  - ▪ Current Living Situation is intended for this purpose – this is how PATH and Outreach record client location for reporting to HUD.
  - ▪ Stephanie expressed that this is concerning because case managers will use CLS as self-report even though that is not the intention of the CLS – the case manager is asked to verify they have evidence a client is in a certain location.
  - ▪ Wondering if this is a training issue that ICA can continue to help with.
  - ▪ There is a File category 'Homeless Documentation' - does require a file upload and not a place to write a note.
  - ▪ ICA and Chittenden will follow up on this conversation to see how the system can support this work.
- o Desire to be able to run a report that allows agencies to look at specific client or *case manager* – having written guidance on this would be helpful
  - ▪ Definitely run a report on a client's notes
  - ▪ Dave shared a note report you can run by case manager and get results for multiple clients: Program Roster; which tells you the number of notes written by case manager
  - ▪ Custom Report – ICA will follow up with our reporting team – would like to be able to report on a single case manager notes for all clients.

- Next meeting agenda items – thoughts / suggestions
- Next Meeting in 2022
  - o July 5, 2022 – cancel, lots of committee members on vacations
  - o <mark>August 2, 2022 – next meeting</mark>
    - ▪ Review list of Note categories
  - o September 6, 2022
  - o October 4, 2022
  - o November 1, 2022
  - o December 6, 2022