

# Welcome!

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January 2023  
OC HMIS User Meeting

**Please enter your agency  
name in the chat box**



# Agenda

1. Agency User Fees
2. 2023 HIC and Sheltered PIT
3. HMIS Part 2 Recertifications
4. Meeting Materials Page Updates
5. CES City Field
6. Updating Disability Enrollment vs Status Update
7. Project Start Date
8. Project Exit Date
9. History Tab
10. Creating Client Records without Client-Identifying Information
11. Refusing/Revoking Consent to Share Personal Information
12. DropBox Clean Up
13. Data & Performance Management Meeting Agenda
14. Holiday
15. Q&A
16. Office Hours

## 2023 HMIS User Fees

- Agencies will receive invoices for 2023 HMIS User Fees within the next two weeks
- Payment due 60 days from date of invoice
- 211OC will upload user fees to each agency's Dropbox



# 2023 HMIS User Fees

## HMIS Participation Required

- 1 – 5 users: \$750 annually
- 6 – 24 users: \$2,750 annually
- 25 or more users: \$3,500 annually

## CES Access Points

\$200 per agency

## Agency Administrators

- \$759.28 per AA not covered under current Policies and Procedures

# 2023 HIC and Sheltered PIT

## Who should participate?

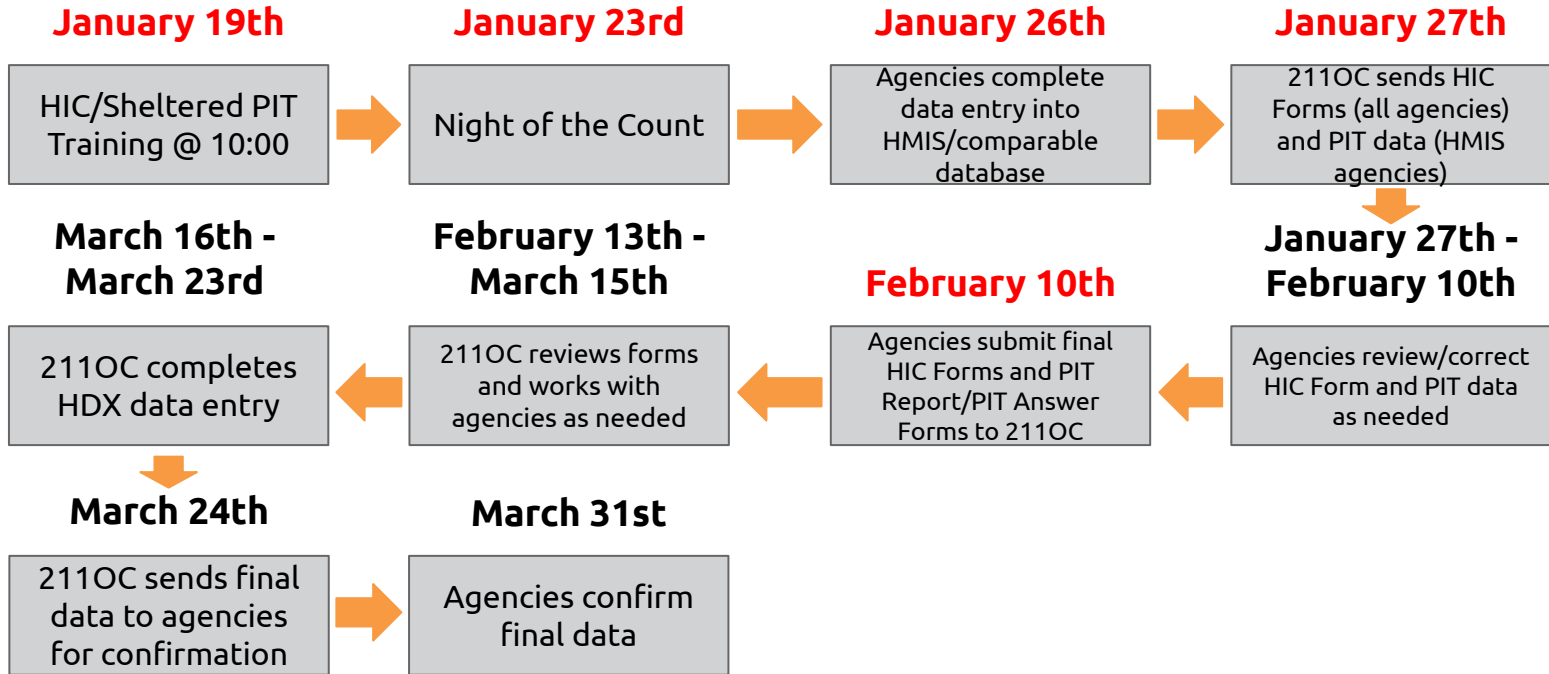
Agencies with any of the following project types, whether or not the projects are in HMIS:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

## What can I do now?

- Complete data entry and data clean-up in HMIS
- Set-up new agencies and projects as needed
- Close projects that are no longer active

# 2023 HIC and Sheltered PIT Timeline



# HMIS Part 2 Recertification

- The [2022 HMIS Part 2 Recertification](#) is now available.
- Users with Read Only accounts or accounts created on or after June 1st are excluded from this requirement.
- Agency Administrators must submit the [2022 HMIS Part 2 Recertification Form](#) for their users.
- Users that do not complete the recertification by January 31st will have their accounts locked until the Recertification is completed.



# Meeting Materials Page Updates

The [HMIS User Meeting Materials](#) and [Data and Performance Management Meeting Materials](#) pages have been updated.

- The months are organized in ascending order
- Meeting Materials are linked to meeting mins, PowerPoint and recorded meeting
- New: Agenda listed for quicker search

## HMIS User Meeting Materials

2022

Month	Meeting Materials	Agenda
January	<a href="#">Minutes</a> <a href="#">PowerPoint</a> <a href="#">Recording</a>	2022 HIC and Sheltered PIT HMIS Policies and Procedures LSA Dashboards Agency Admin Responsibilities HMIS Part 2 Recertification Troubleshooting Logging into HMIS Data & Performance Management Meeting Agenda Holiday



# Coordinated Entry System City Field

There has been an updated to the CES Enrollment screen, the field "Which SPA is this household being served in?" has been removed.

A note has been added to the Enrollment screen noting that the client's city prior to entry will be used to determine their SPA for housing opportunities. This city field is a requirement and this field should not be edited after the enrollment.

## OC CUSTOM QUESTIONS

THE CLIENT'S CITY PRIOR TO ENTERING THE CES PROJECT WILL BE USED TO DETERMINE SPA FOR HOUSING OPPORTUNITIES. THE CITY THE CLIENT RESIDED IN THE NIGHT BEFORE PROJECT START.

What city were you in immediately prior to entry into this project?

Select



# Updating Disabling Condition

When you need to update a client's disabling condition there are different processes based on the type of update that is needed.

- If the client **always** had a disabling condition but it wasn't noted in their program enrollment then you would update the **enrollment screen**.
- If the client had a **change** in their status after the enrollment then you would add a **Status Assessment** with their disabling condition.

For additional information, review the [Disabling Condition Field KB](#)



# Project Start Date

The project start date determines when a client's period of participation with a project begins.








- **All projects** need this data element for reporting time spent participating in the project.
- There may be instances when members in a household enrolled in the same program has a unique **Project Start Date**.
- This data is to be collected for **all clients** for **all project enrollments**.

## Training Client 1

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

Enroll 'CoC Funded Family Coordinated Entry Training Project' program for client

Training Client 1

<b>Project Start Date</b>	06/15/2022 
Relationship to Head of Household	Self (head of household) 
<b>PRIOR LIVING SITUATION</b>	
Type of Residence	Emergency shelter, including hotel or motel paid for with emergency shel 
Length of Stay in Prior Living Situation	One year or longer 
Approximate Date Homelessness Started	02/08/2021 
Number of times on the streets, in ES, or Safe Haven in the past three years	Two Times 
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	More than 12 Months 

Project Type Applicability: **All Projects**

Data Collected About: **All Clients**






Collection Point: **Project Start**

Screens in HMIS: **Enrollment Screen**

# Project Start Date

Different project types use the Project Start Date field differently, as there are differences in the meaning associated with “starting” residential, service, and permanent housing projects. See descriptions below for the list of differences between each project.

\*\*\* For additional information, please refer to the [HMIS Data Standard Manual](#).

Project Type	Project Start Date in HMIS
Street Outreach	Date of first contact with the client 
Emergency Shelter	Night the client first stayed in the shelter. Night by Night shelters will allow clients to re-enter as necessary without "exiting" or "restarting" for each stay for a period of ~ 90 days  <b>NOTE:</b> Although agencies may set their own policy for the length of the period, it should be no longer than 90 days.
Transitional Housing/ Safe Haven	Date client moves into residential project, the client's first night in the residence 
Permanent Housing, including RRH	Date client was determined eligible: <ul style="list-style-type: none"> <li>Information provided by the client or referral indicates they meet admission criteria</li> <li>Client has indicated they want to be housed in the project</li> <li>Client is able to access services and housing through the project (e.g. project has an opening or will soon)</li> </ul> 
Service Projects (Services Only, Homeless Prevention, etc).	Date client first began working with the project and generally received first provision of service 

# Project Exit Date

The project exit date determines the end of a client's period of participation with a project.

- **All projects** need this data element for reporting time spent participating in the project.
- Record the **month, day** and **year** of last day of occupancy or service.
- For each client's enrollment in a project, there should only be **one Project Exit Date**.
- This data is to be collected for **all clients** for **all project exits**.


Training Client 1

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM: COC FUNDED RAPID RE-HOUSING TRAINING PROJECT

Enrollment History Assessments Goals Notes Files Forms × Exit

End Program for client Training Client 1

**Project Exit Date** 11/07/2021 

Destination Staying or living with friends, temporary tenure (e.g. room, apartment or h

DISABLING CONDITIONS AND BARRIERS

Physical Disability	Yes	▼	Long Term	Yes	▼
Developmental Disability	No	▼			
Chronic Health Condition	No	▼			
HIV - AIDS	No	▼			
Mental Health Disorder	No	▼			
Substance Use Disorder	No	▼			

Project Type Applicability: **All Projects**  
Data Collected About: **All Clients**  
Collection Point: **Project Exit**  
Screens in HMIS: **Exit Screen**

# Project Exit Date

Different project types use Project Exit Date differently, to address the difference in meaning associated with “ending” residential and service projects. Each individual client in a household will have their own Project Exit Date. If one member of a household leaves the project before the rest of the household, the leaver's exit date should reflect the actual day that client left the project.

\*\*\* For additional information, please refer to the [HMIS Data Standard Manual](#).

Project	Project Exit Date in HMIS
<b>Street Outreach</b>	<p>Clients enrolled in Street Outreach projects should be exited in the following manner:</p> <ul style="list-style-type: none"> <li>• If a client is referred to an Emergency Shelter (ES) or Transitional Housing (TH) project, the client should be exited on the date the client enrolled into the ES or TH project.</li> <li>• If the client was referred to a Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH), or Other Permanent Housing (OPH) project, the client should be exited from the SO project with an exit date of the client's Housing Move-in Date in the project they were referred to.</li> <li>• If staff has not made any contact with the client within 60 days of the last contact date.</li> </ul>
<b>Site Based Residential Projects: Emergency Shelter/Transitional Housing</b>	The last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.
<b>Tenant-based Permanent Housing projects: Permanent Housing, including Rapid Rehousing</b>	The last day the client receives rental assistance or supportive services (RRH) or is provided rental assistance (tenant-based PSH, transition-in-place, or other permanent housing).
<b>Non-residential projects: Services Only, Homelessness Prevention</b>	The last day a service was provided or the last date of a period of ongoing service.

# Updated Client History KB

Our [Knowledge Base article](#) for the History Tab in HMIS has been updated.

- A video explaining the history tab and managing historical items for a client in HMIS has been uploaded.
- Color coding for the history tab in HMIS has been updated to distinguish between Coordinated Entry events and other historical items
- A section dedicated to reviewing a client's profile for CES workflow has also been added to assist with those working with CES participants.

The screenshot displays the 'History' tab in the HMIS system. The table lists various services and events for a client, with rows color-coded by type. The legend below the table identifies the colors: Program (light yellow), Service (light blue), Referral (light blue), Reservation (light pink), Assessment (light green), and Events (light orange).

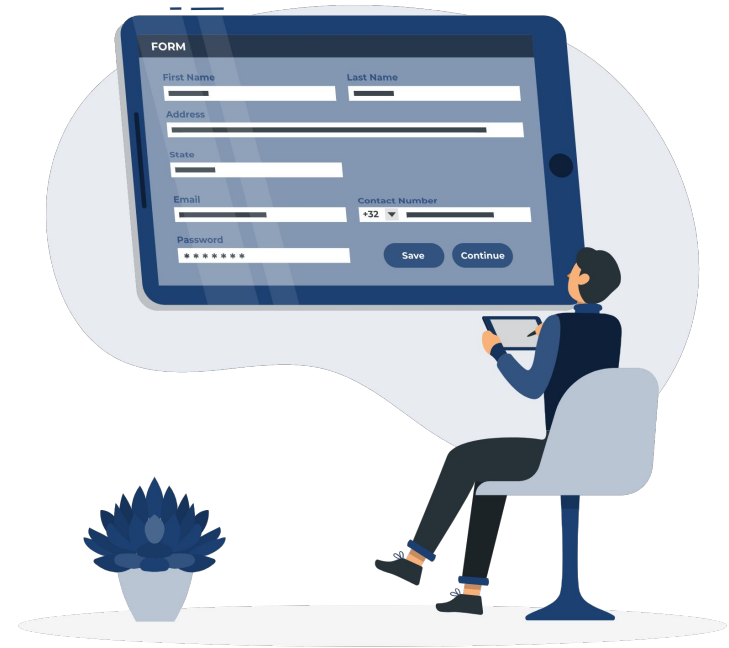
Service Name	Start Date	End Date	
<b>Referral: Coordinated Entry System</b> County of Orange referral to Community Queue ⓘ	01/03/2023	<b>Pending</b>	
<b>Referral: Springfield Homeless Shelter</b> County of Orange referral to A Springfield Agency ⓘ	01/03/2023	01/03/2023	
<b>Individual CES Assessment</b> County of Orange ⓘ		01/03/2023	📄 📄
<b>Case Management:Case Management</b> A Springfield Agency ⓘ	01/03/2023	01/03/2023	📄 🗨️
<b>Referral to Emergency Shelter bed opening:Referr...</b> County of Orange ⓘ	01/03/2023	01/03/2023	📄
<b>Springfield Homeless Shelter</b> A Springfield Agency ⓘ	01/03/2023	<b>Active</b>	🔗
<b>[OC Custom] Individual Bed Reservation Assessm...</b> County of Orange ⓘ		01/02/2023	📄 📄

Legend:

- Program
- Service
- Referral
- Reservation
- Assessment
- Events

# Creating Client Records without Client-Identifying Information

- “Private” profiles may not participate in CES or referred to the Community Queue.
- To participate in CES the record must be made public.
- At record creation this is done with the “Consent Refused” button.





# Creating Client Records without Client-Identifying Information

To create a record without client-identifying information:

1. Click on **Add Client** on the Search screen.
2. Check the **Consent Refused** checkbox. This will automatically enter Client Refused for all client identifying fields (First Name, Last Name, and SSN).
3. If the client doesn't want to provide their Date of Birth, change the Quality of DOB field to Client Refused.
4. Complete the remaining fields on the Client Profile.
5. In the Release of Information section, change the Permission field to No.
6. Click on Add Record.

Please review the [Creating Client Records without Client-Identifying Information](#) KB for more information.

SEARCH FOR A CLIENT

ADD CLIENT +

1

Q Enter search terms for a client

SEARCH

Use full name, partial name, date of birth or any combination.

⚠ To search a client, please note that you can use any combination of: name (whole or part first or last name), DOB, SS number

CREATE A NEW CLIENT

RELEASE OF INFORMATION

Social Security Number 000 - 00 - 0000

Quality of SSN Client refused

Last Name Refused

First Name Automatically Generated

Quality of Name Client refused

Quality of DOB Client refused 3

Middle Name None

Gender Select 4

Race Select

Ethnicity Select

6 ADD RECORD CANCEL

RELEASE OF INFORMATION

Permission No 5

Start Date 01/03/2023

End Date / /

CONSENT REFUSED

Consent Refused 2

# Refusing/Revoking Consent to Share Personal Information

A client has the right to refuse or revoke their consent to sharing their information. If a client you are serving is already in HMIS and has revoked their consent, complete the following steps to anonymize the profile:

- Step 1: Upload a completed copy of the Client Revocation of Consent Form to the client's profile in HMIS under the Client Revocation of Consent Form file category.
- Step 2: Submit a ticket to the HMIS Help Desk including the client's identifier so that HMIS Staff can properly anonymize the client's record.
- OC HMIS staff will then remove the client's name, DoB, SSN from the profile and message AAs currently working with the client.

Last Revision: 01/2022

Orange County Continuum of Care Homeless Management Information System (OC HMIS)

## Client Revocation of Consent Form

By signing below, I revoke my consent to share my Protected Personal Information (PPI) in the OC HMIS.

I understand that this revocation authorizes the removal of my PPI from the shared HMIS database and will prevent further PPI from being added. I understand that the PPI that I previously authorized to be shared cannot be entirely removed from the HMIS database and will remain accessible to the limited number of organization(s) that provided me with direct services.

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last 4 digits of SS \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Head of Household (Check here)

### Minor Children (if any):

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last 4 digits of SS \_\_\_\_\_

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last 4 digits of SS \_\_\_\_\_

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last 4 digits of SS \_\_\_\_\_

Client Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last 4 digits of SS \_\_\_\_\_

\_\_\_\_\_  
Print Name of Organization

\_\_\_\_\_  
Print Name of Organization Staff

\_\_\_\_\_  
Signature of Organization Staff

\_\_\_\_\_  
Date

# Refusing/Revoking Consent to Share Personal Information

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES **FILES** CONTACT LOCATION REFERRALS

UPLOAD A FILE

Category Client Revocation of Consent ▾

Predefined Name Client Revocation of Consent Form ▾

File

Trouble attaching files? Switch to the Basic Uploader


Private

74FE8960E Refused

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

CLIENT PROFILE

Social Security Number	XXX-XX-XXXX	🔒
Quality of SSN	Client refused	▾
Last Name	Refused	
First Name	74FE8960E	
Quality of Name	Client refused	▾
Quality of DOB	Approximate or partial DOB reported	▾
Date of Birth	01/01/1998	Adult Age: 25
Middle Name	None	▾
Gender	Male	▾
Race	American Indian, Alaska Native, or Indigenous	▾
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x)	▾
Veteran Status	No	▾



UNIQUE IDENTIFIER  
74FE8960E 🔒

# DropBox Clean Up

- Bi-Annual DropBox Clean Up Schedule:
  - January
  - July
- Please review your Agency's DropBox folder and download any files you will need for your records
- We will be removing all DropBox files on Friday, January 20th
- Thank you for your cooperation!



# Data & Performance Management Committee Meeting

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## Agenda:

The January 2023 Data & Performance Management Committee Meeting will be cancelled!

The Emergency Shelter Project Performance Report will be published next week!

# Holiday Observed

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The HMIS Help Desk will be closed on **Monday, January 16th** in observance of **Martin Luther King Jr. Day**.

We will be back in the office to assist you on Tuesday, January 17th.



# Q&A

**Reminder: Please enter your agency name in the chat box for attendance**

Thank you  
Have a great day!

Next User Meeting: Feb 1st



# Office Hours