Welcome!

March 2023
OC HMIS User Meeting

Please enter your agency name in the chat box

Agenda

1. System Performance Measure Report
2. Updated Agency List on HMIS Consent Form
3. Release of Information - Household with Children
4. Name Data Collection
5. Reassigning Case Managers
6. Sending Client Information to HMIS Helpdesk
7. Searching Up Client Records
8. Data & Performance Management Meeting Agenda
9. Q&A
10. Office Hours

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System Performance Measures (SPM)

- HUD requires CoCs to measure their performance as a system on an annual basis

- HMIS Project Types: Safe Haven, Street Outreach, Emergency Shelter, Transitional Housing, and Permanent Housing (including Permanent Supportive Housing, Rapid Rehousing, and Other Permanent Housing)

- Reporting Period: 10/1/21 – 9/30/22

- Submitted to HUD February 2023

SPM Year over Year & 2021 - 2022 Submission Reports

Clients returning to homelessness after being permanently housed has increased 7% since FY17, but this is likely due to more data being available in HMIS.
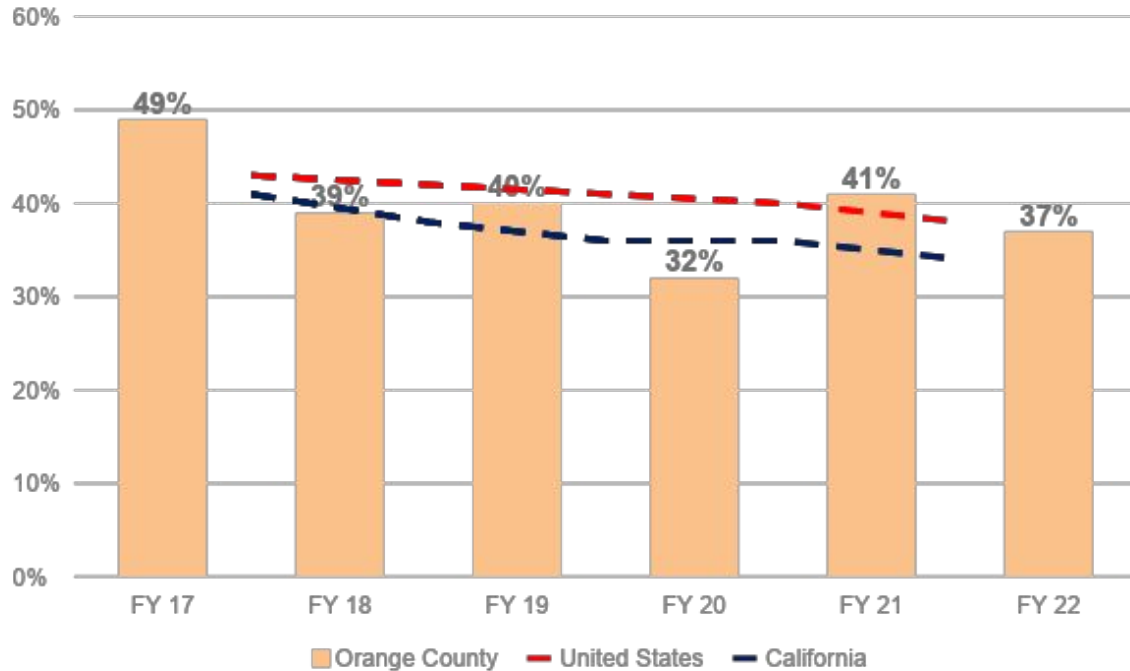

Legend: Orange County — HMIS Participation
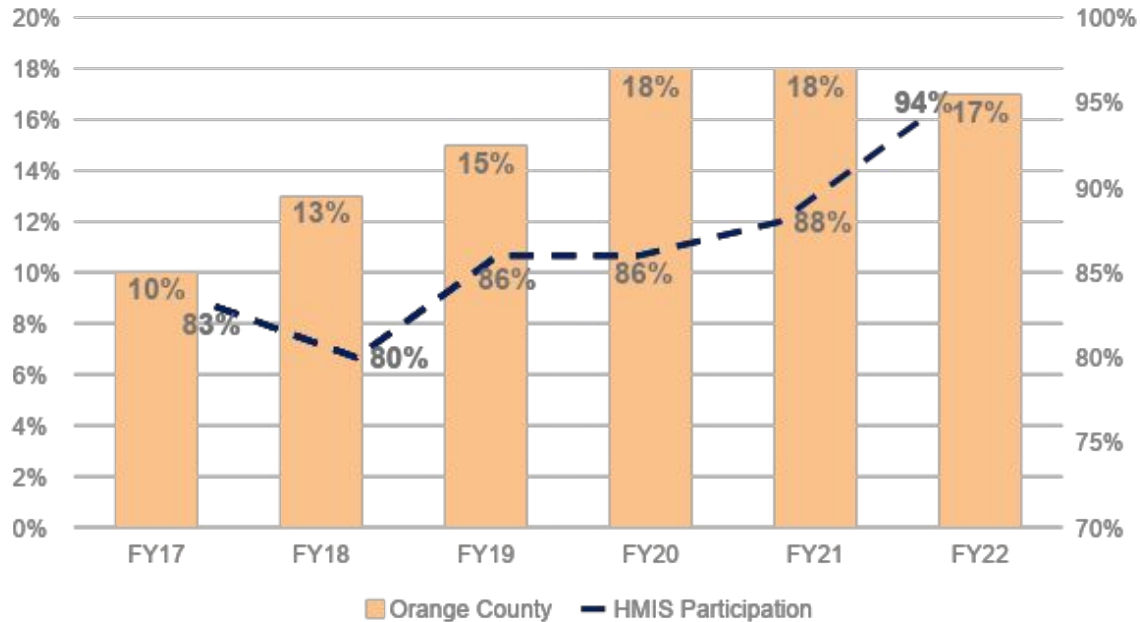
OC is experiencing lower rates of homelessness than San Diego and Los Angeles/Long Beach, but higher than Riverside and San Bernardino.
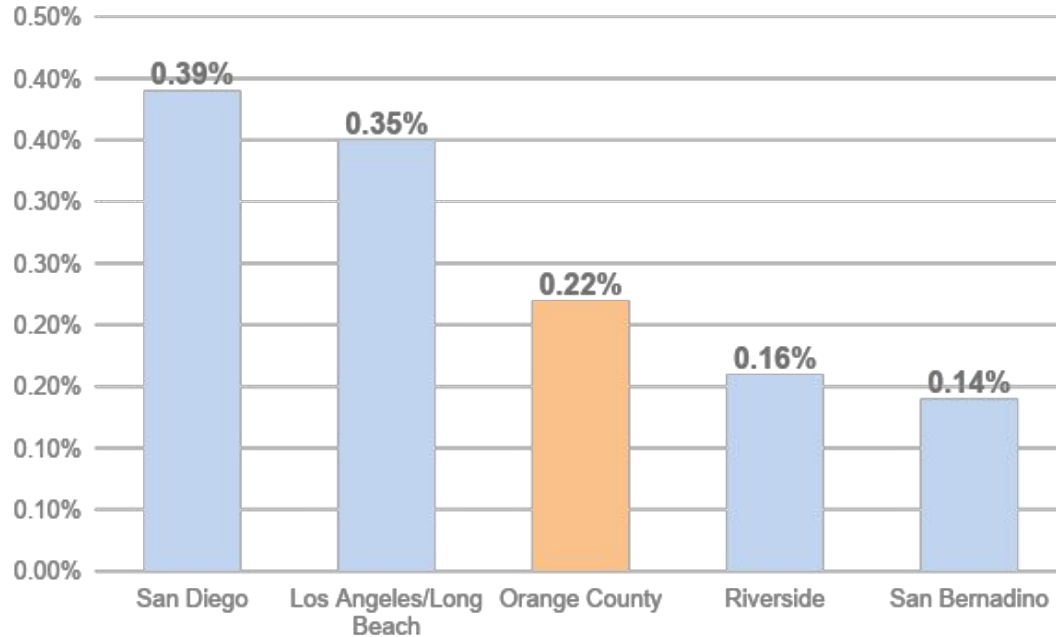
New permanent housing opportunities have allowed more clients experiencing homelessness for the first time to be served.
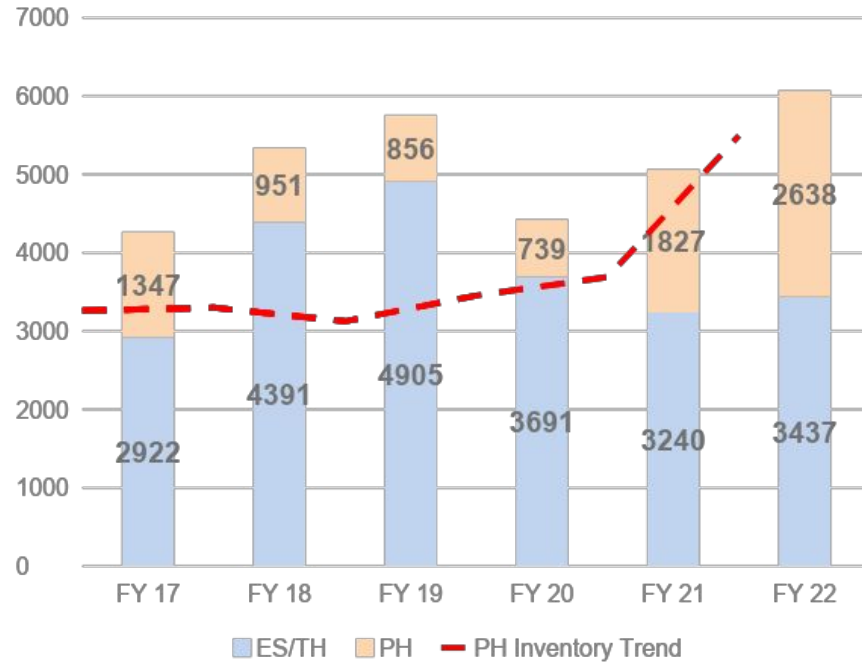
OC Emergency Shelter, Transitional Housing, and Rapid Re-Housing projects are generally more effective at exiting clients to permanent housing than projects across California.

	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22
Orange County	49%	39%	40%	32%	41%	37%

Legend: Orange County · United States · California

Updated Agency List on HMIS Consent Form

The [Consent to Share Protected Personal Information Form](#) has been updated on our website to include an up-to-date roster of HMIS-participating agencies.

The Form is available in English, Spanish and Vietnamese.

Revised 03/2023

Orange County Continuum of Care
Homeless Management Information System Client Consent form

Welcome to the Orange County Continuum of Care (CoC).

You are currently accessing services from an entity participating in the Orange County Homeless Management Information System (HMIS). HMIS is the secure database used to collect and store information about clients served through this entity. It also allows the sharing of information among HMIS participating entities to streamline access to services and help them understand a client's history of homelessness or housing instability. HMIS is managed and operated by 2-1-1 Orange County (211OC).

In Orange County, all entities that participate in HMIS share data with each other to coordinate care and improve program outcomes. If you agree to participate in HMIS, this means you allow information gathered by a participating entity to be entered into HMIS and allow all other participating entities to view and use your data to provide services to you. Additionally, the entity will also be able to see what kind of services in Orange County you have received in the past.

A complete list of all entities that participate in the HMIS is maintained at http://ochmis.org/about-hmis/contributing-agencies/. You can also ask the entity you are receiving services from for a list of HMIS-participating entities. Please note that the list of entities contributing data to HMIS can change frequently and without notice, and therefore the website should be consulted for the most recent list.

HMIS contains sensitive health and personal data. The Orange County CoC and HMIS participating entities take your privacy very seriously and have implemented **the following protections to safeguard your data:**

- Individual client data is only viewable by trained staff at each participating entity.
- In order to participate in the HMIS, leaders at each agency must sign an Entity Agreement that includes a commitment to protecting client data and maintaining confidentiality.
- In order to use HMIS, entity staff must complete multiple trainings that examines privacy laws and the importance of client privacy.
- The HMIS is hosted on a secure server and data is encrypted.

What information is shared in the HMIS database?
We share Protected Personal Information (PPI), Protected Health Information (PHI), and general information obtained during your intake, assessment, and enrollment in the program. This may include, without limitation, the following:

- Your name and your contact information
- Your social security number and date of birth
- Your basic demographic information such as gender, race and ethnicity

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Orange County

Release of Information - Households with Children

Uploading ROI as an Attached PDF - This will prompt the end user to upload the PDF, which must be the Consent To Share Protected Personal Information form.

For households with minor children, make sure the HoH's attached PDF contains the minor children's information. Each minor child in the household should be included on the same attached PDF.

The ROI for the minor children can be set to Household. The pdf doesn't need to be upload for each minor child.

[Accessing and Completing Release of Information (ROI) Page KB](#)

Marge Simpson

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

⚠ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

RELEASE OF INFORMATION

Permission	Yes
Start Date	03/01/2023
End Date	03/01/2030
Documentation	Attached PDF
File	Select File

HMIS-Client-Consent-final-02.24.23-1.pdf (597.55KB) - Completed ✕

Trouble attaching files? Switch to the Basic Uploader

SAVE CHANGES   CANCEL

Maggie Simpson

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

PRIVACY

Client Privacy	Public Private Client data is used by other agencies
Consent Refused	

SAVE CHANGES   CANCEL

RELEASE OF INFORMATION   ADD RELEASE OF INFORMATION ⊕

Permission	Type	Start Date	End Date	Version
Yes System CA-602	Household	03/01/2023	03/01/2030	V.5

2·1·1 Orange County

Consent to Share Protected Personal Information form - Households with Children

SIGNATURE AND ACKNOWLEDGEMENT

Your signature indicates that you have read (or been read) this consent form, have received answers to your questions, and you freely consent to have your information, and that of your minor children (if applicable and/or if you choose to include them), entered into the HMIS database. You also consent to share your information with other participating organizations as described in this consent form.

Client Name:_____Date Of Birth (DOB):__/_____/_____

Signature:_____Date Signed:____/____/_____

Minor Children (if applicable and/or if you choose to include them):

Name:_____DOB:____/____/_____   Name:_____DOB:____/____/_____

Name:_____DOB:____/____/_____   Name:_____DOB:____/____/_____

Agency Staff Signature:

Agency Staff Name:_____Agency Staff Signature:_____

Agency Name:_____Date:____/____/_____

If you feel any of your rights outlined in this document have been violated, please contact (714) 589-2360.

Name Data Collection

During collection of the client's information in HMIS, transgender clients may have more than one name

- For the First Name, Middle Name, and Last Name, you should enter their legal name so profiles are not duplicated.
- If the client wants to be called by a different name, you should enter this information in the Alias field.

For information on Adding a Client Profiles to HMIS, please refer to the knowledge base article Adding Client Profiles to HMIS
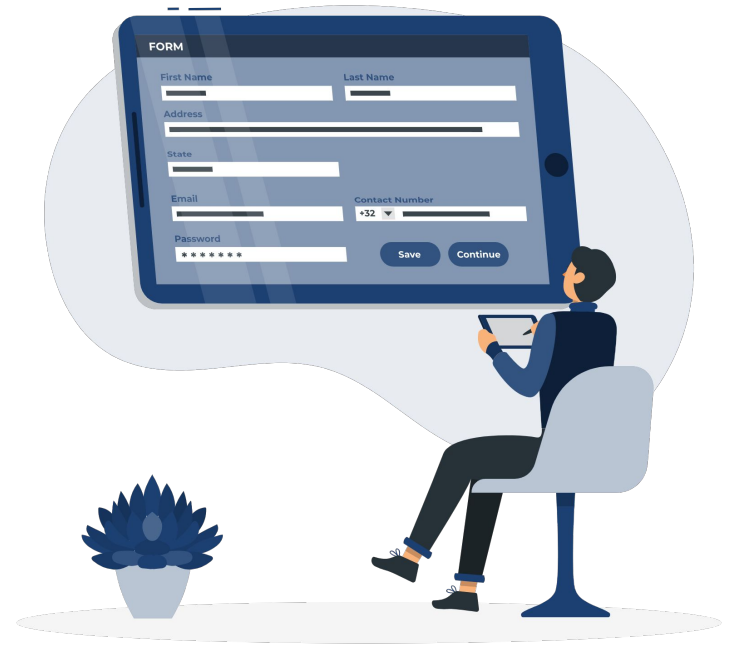
Name Data Collection

OC Training Agency

Quality of DOB	Select ⌄
Date of Birth	__/__/____
Middle Name	
Gender	Select ⌄
Race	Select ⌄
Ethnicity	Select ⌄
OC CUSTOM QUESTIONS	
Alias	
Pronoun(s)	Select ⌄
Federally Recognized Tribe	Select ⌄

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Orange County
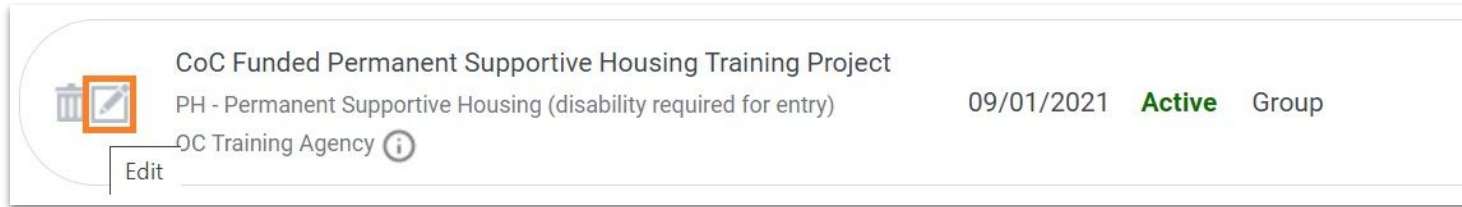
Reassigning Case Managers

HMIS will automatically assign the HMIS user who enrolled the client into the program as the client's Case Manager.

Follow these instructions on the Reassigning Case Managers Knowledge Base article on more information on how to reassign a client to another user.

Reassigning Case Managers

Step 1: Search for the client's Client Profile record, and select the Edit icon. (Note: Please review our Knowledge Base article on Searching for a Client Records for more information)

Step 2: Go to the client's Program tab, and edit the Program by selecting the Edit icon next the the enrollment.

** Note: For clients that have already been exited, you can assign another staff member without removing the exit date.

Reassigning Case Managers

Step 3: Once in the program, you will see a sideboard section to the right side of the screen. Locate the Assign Staff section, and click on the Edit icon to the right of the name.

A drop down menu will appear that has a list of all the active staff within your agency. Choose the new Case Manager (assigned staff) from the list, and select Save Changes. You can select more than one staff member to be assigned as Case Manager by clicking the boxes next to the name of each staff member:
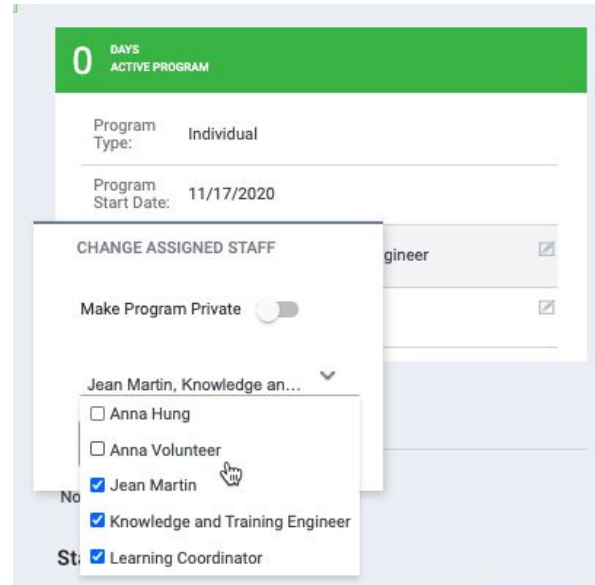
Sending Client Information to the HMIS Help Desk

Client Identifying Information, also known as Personal Protected Information (PPI), is a category of sensitive information that is associated with an individual person. This information should be accessed only on a strict need-to-know basis, handled and stored with care.

This category includes but is not limited to:
- First Name & Last Name
- Date of Birth (DOB)
- Social Security Number (SSN)
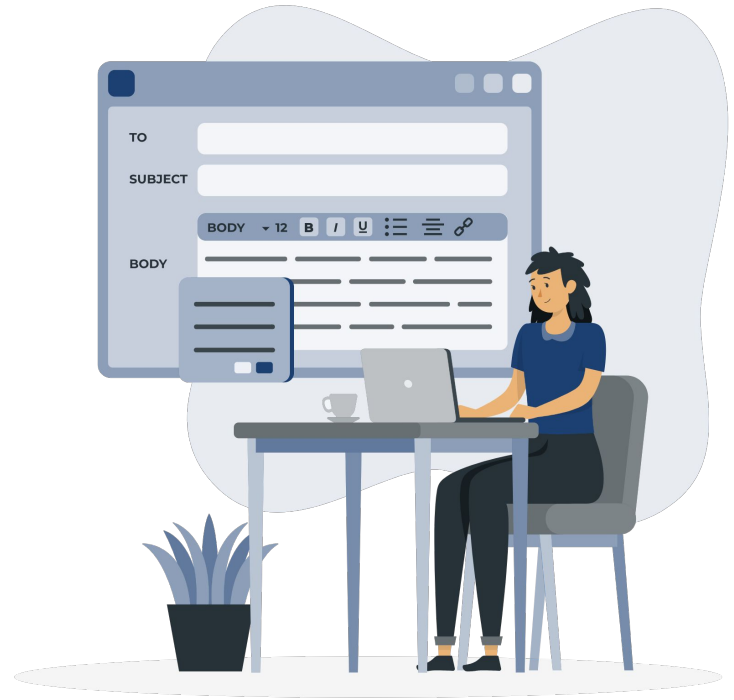
Sending Client Information to the HMIS Help Desk

Client identifying information should **never** be sent to the HMIS Help Desk through text of the ticket or an attached screenshot or other document. If you need to discuss a specific client only the client's HMIS Client Unique Identifier should be sent.

Agency Administrators who repeatedly submit client identifying information to the HMIS Help Desk may be subject to corrective action.

Sending Client Information to the HMIS Help Desk

2-1-1 Orange County
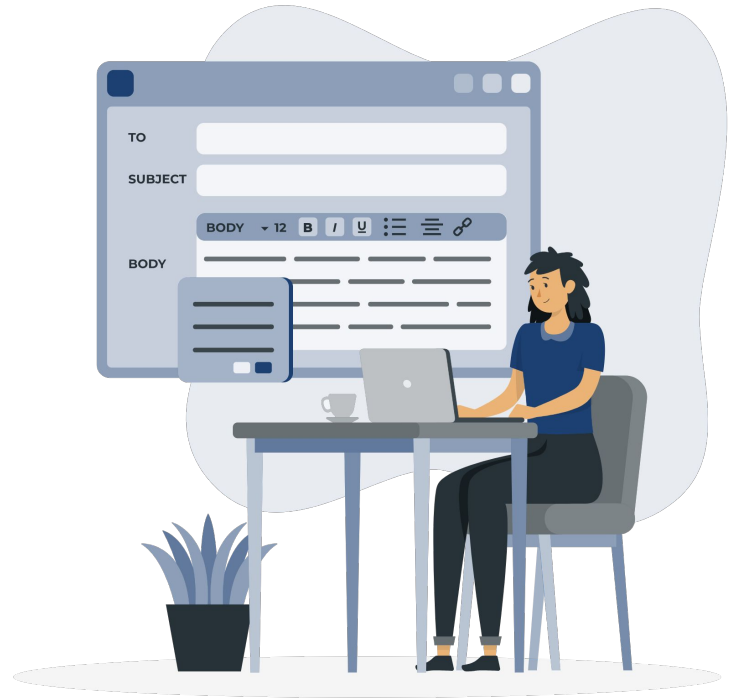
Sending Client Information to the HMIS Help Desk

The easiest way to let the HMIS Help Desk know which client and enrollment you need help with is to send us the link to the client's enrollment.

You may also send the Client's Identifier (along with the name of the Program they are enrolled in and the Client's Program Start Date), which you can find on the Client's Profile page under the photo section on the Profile tab.

Searching for Existing Clients

- Before creating a client record, please make sure to search for the client to avoid duplicate profiles.

- When searching for a client, enter partial first and last names.
  - You can also search by complete or partial SSN, DOB, and Aliases.

- The system will automatically search the database and display potential clients that match your criteria.

Duplicate Client Records

- Agency Admins will submit a support ticket to the HMIS Team to merge the <u>duplicate client records</u>
  - Identifying which profile is the primary record

- Tip 1: Run the Duplicate Clients report on a regular basis to catch these duplicate records

- Tip 2: Provide refresher trainings to the team

Data & Performance Management Committee Meeting

Agenda:

- 2023 HMIS Planning
- Homelessness Prevention Project Performance Report

Thursday, March 9th at 1:30 - 3:00 PM

Click here to Join!

Meeting ID: **810 9405 7685**

Passcode: **625080**

211 Orange County

Q&A

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

Thank you
Have a great day!

Next User Meeting: Apr 5th

Office Hours