



**Get Connected. Get Help.™**

# Welcome!

March 2024  
OC HMIS User Meeting

JOURNEY 100



# Agenda

1. System Performance Measure
2. New Field Setting - Multi-select
3. HMIS Client Contact Information
4. CES Enrollment and Referral
5. Adding Households to the Bed Reservation Community Queue
6. Managing Household Composition Changes in the CES
7. Update to HMIS User Account Form
8. Recertification Deadline
9. Status and Annual Assessments
10. Project Performance Reports
11. Resources and Training
12. Q&A
13. Office Hours

# System Performance Measure

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: 10/1/22 – 9/30/23

Submitted to HUD February 2024

[SPM Year over Year & 2022 - 2023 Submission Reports](#)



Graphic by: <https://storyset.com/online>

# System Performance Measure

**Measure 1** - Length of time persons remain homeless

**Measure 2** - The extent to which persons who exit homelessness to permanent housing destinations return to homelessness

**Measure 3** - Number of homeless persons

**Measure 4** - Jobs and income growth for homeless persons in CoC Program-funded projects

**Measure 5** - Number of persons who become homeless for the first time

**Measure 7** - Successful housing placement

\*Measure 6 is not applicable to the Orange County CoC



Graphic by: <https://storyset.com/online>

# System Performance Measure - Comparison to State and Nation

Orange County is performing better than the state average in 5 out of 7 measures

Orange County is performing better than the national average in 4 out of 7 measures

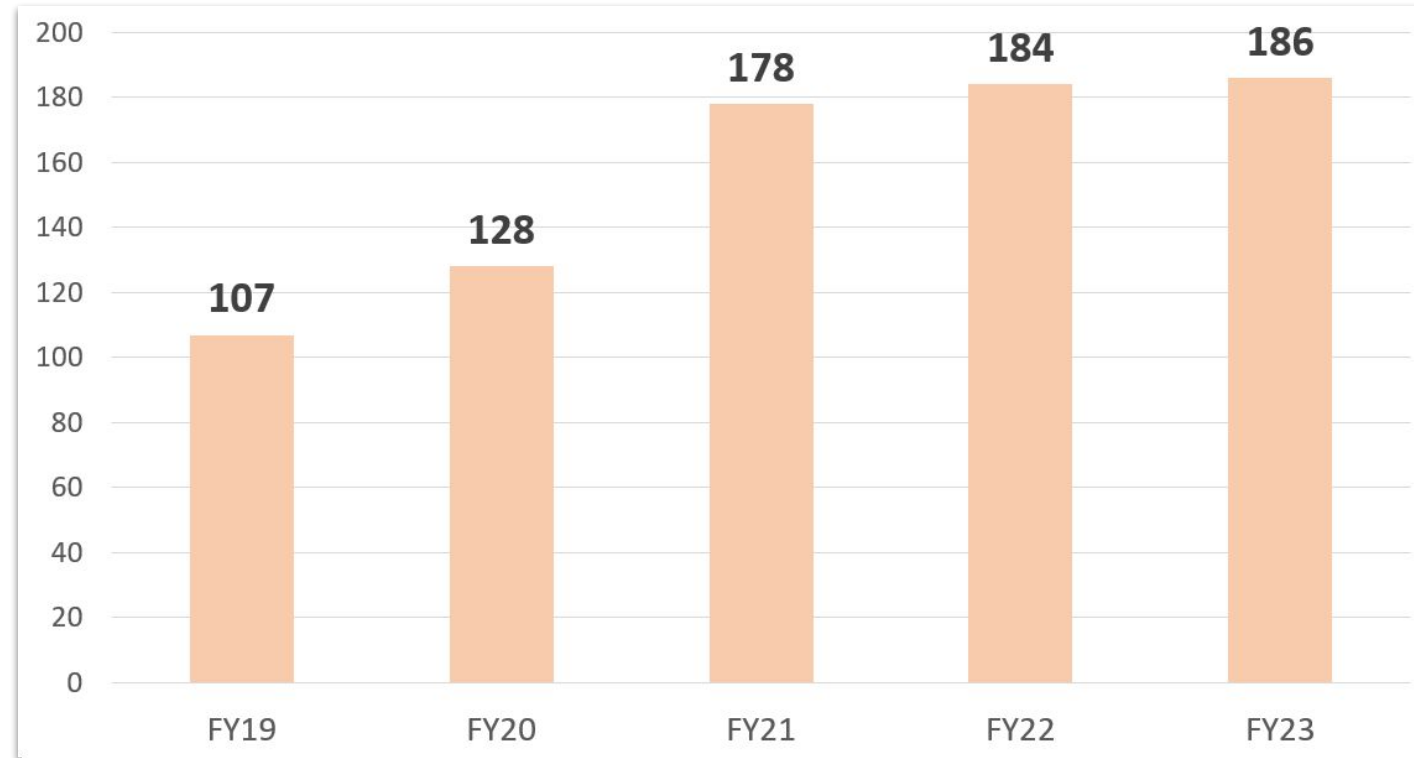
	California	United States
Length of Stay in Emergency Shelter and Transitional Housing Projects		
Returns to Homelessness	✓	
Increased Income for Stayers	✓	✓
Increased Income for Leavers	✓	✓
Successful Exits from Street Outreach Projects		
Permanent Housing Exits from Emergency Shelter, Transitional Housing, and Rapid Re-Housing Projects	✓	✓
Stabilization in Permanent Housing for Permanent Supportive Housing and Other Permanent Housing Projects	✓	✓

# Finding: Length of stay has gradually increased for clients in Emergency Shelter and Transitional Housing projects

Project Types in this measure:

- Emergency Shelter
- Transitional Housing

Measure: Number of days clients are enrolled in the project

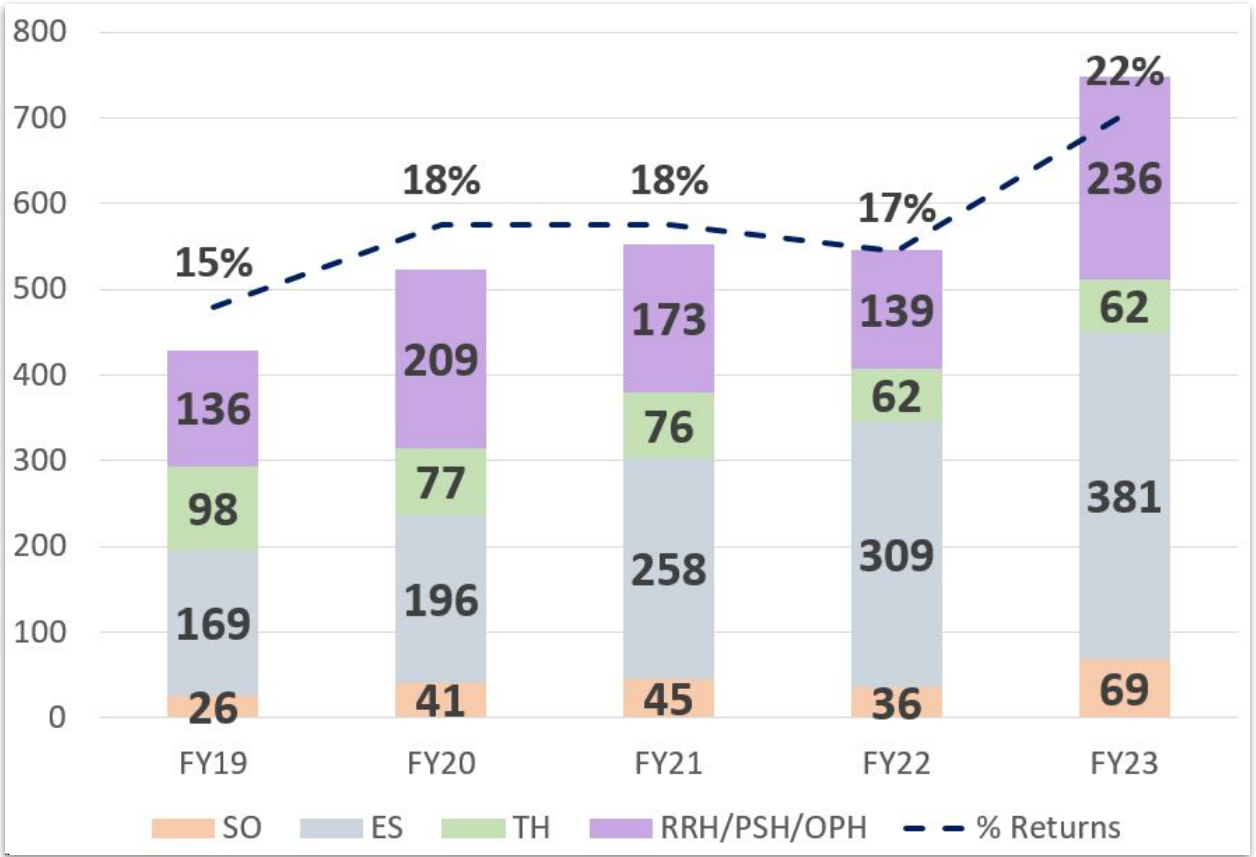


# Finding: Clients returning to homelessness after placement in permanent housing continues to increase. Most of these returns are clients exited from Emergency Shelters.

Project Types in this measure:

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

Measure: Percentage of clients that exit to a permanent housing situation and return to the homeless system within 2 years

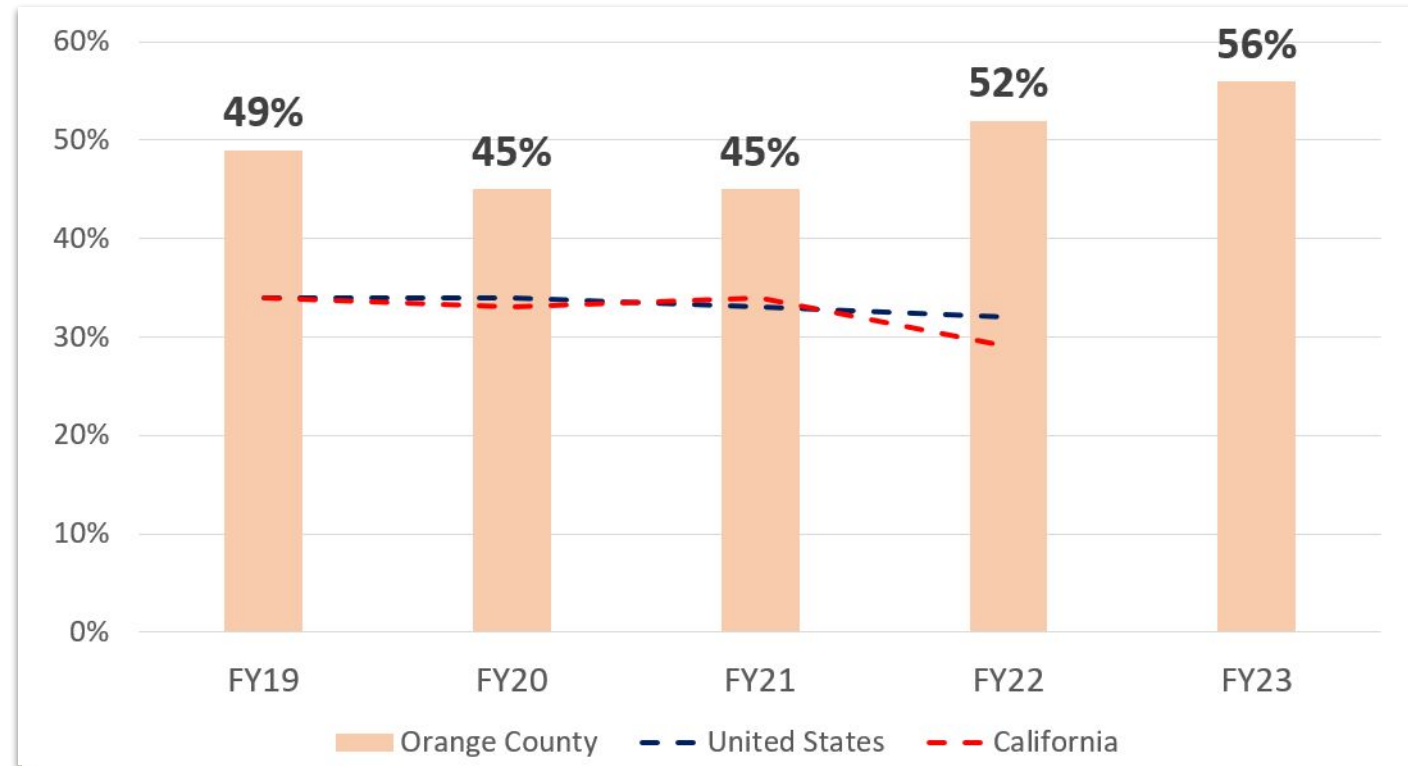


# Finding: Orange County CoC-funded Joint TH/RRH, PSH, and RRH projects are more effective at increasing a client's income before exit than other CoCs across the state and nation.

Project Types in this measure:

- Joint TH/RRH
- Rapid Re-Housing
- Permanent Supportive Housing

Measure: Percentage of clients in CoC-funded Joint TH/RRH, Rapid Re-Housing, and Permanent Supportive Housing projects that exited during the reporting period and reported an increase in income at exit.



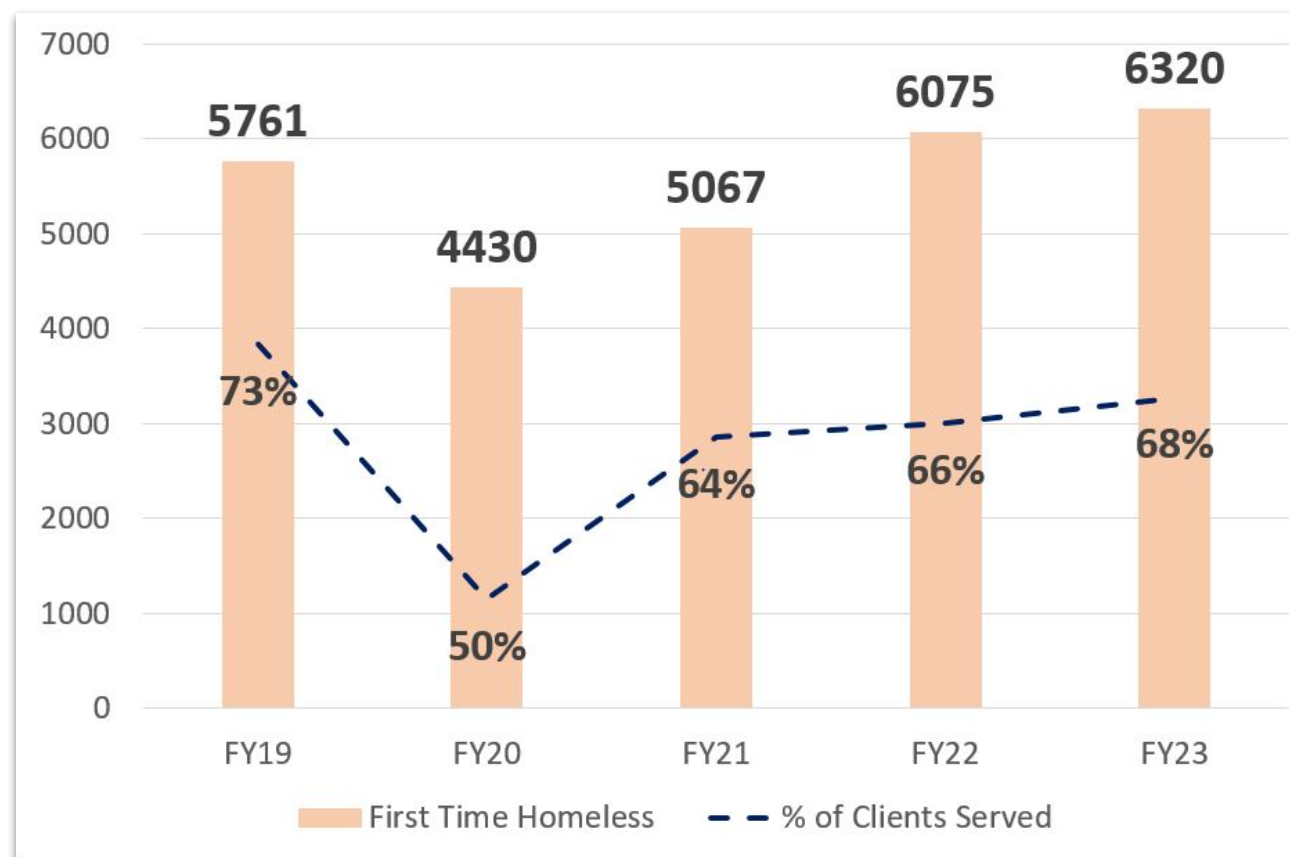


# Finding: The proportion of clients being served for the first time has declined slightly in the past 5 years. There was a significant decrease in first time homeless clients in FY20.

Project Types in this measure:

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

Measure: Number of clients that did not have a prior entry in HMIS in the previous 24 months (clients appearing in HMIS for the first time)



# New Field Setting - Multi - Select

There is a new field setting that allows for multiple selections from a picklist. This functionality is currently in the fields such as Gender, Federally Recognized Tribe, Race and Ethnicity, and Coordinated Entry Event Categories.

The new setting can be applied to custom fields where a picklist may need additional selections.

The screenshot shows a form with several fields. The 'Race and Ethnicity' field is open, displaying a multi-select dropdown menu. The selected options are 'Hispanic/Latina/e/o' and 'White'. Other options include 'American Indian, Alaska Native, or Indigenous', 'Asian or Asian American', 'Black, African American, or African', 'Middle Eastern or North African', 'Native Hawaiian or Pacific Islander', and 'Client doesn't know'. The text 'Please fill in' is visible next to the dropdown. The form also shows 'Gender' set to 'Man (Boy, if child), Questioning' and 'Veteran Status'.

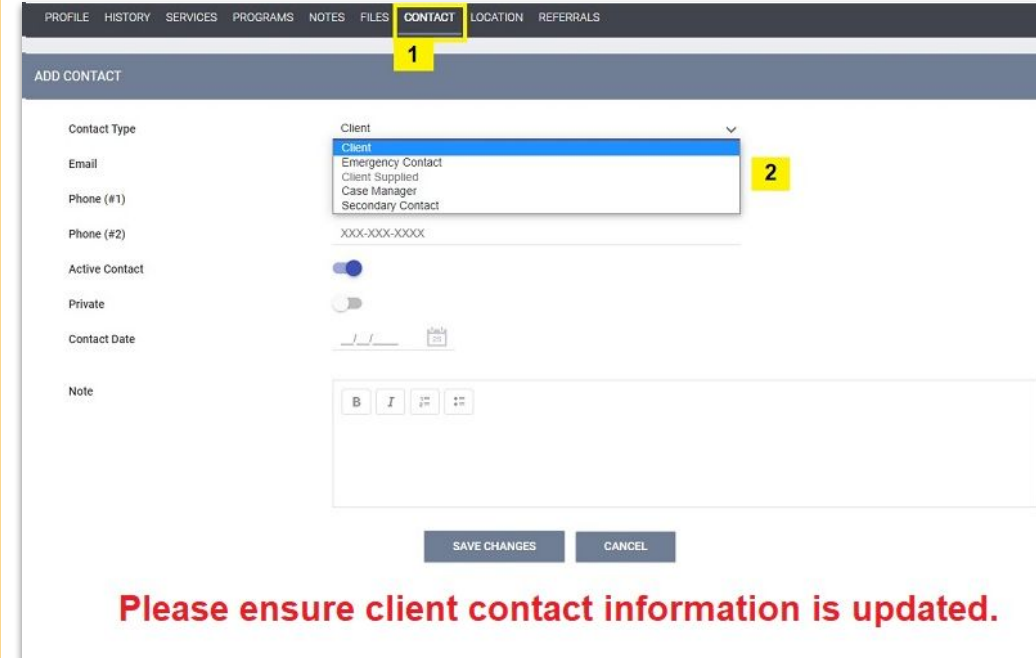
The screenshot shows a form with several fields. The 'Finance assistance applied to utilities:' field is open, displaying a multi-select dropdown menu. The selected options are 'Water' and 'Electric'. Other options include 'Gas'. The form also shows 'Assessment Date' set to '03/06/2024' and 'Does the client need help with utilities?' set to 'Yes'.

# Client Contact Information

Please ensure that all participants have updated and accurate contact information in HMIS. If the participant does not have contact information, the current case manager or alternate contact information should be added.

Sharing contact information in HMIS helps coordinate services and communication across all HMIS participating agencies. In addition, it can help streamline the shelter and housing intake process.

For more information about managing contact information in HMIS, please review the [Saving Client Contact Information](#) knowledge base article and view the [Updating Client Contact Information](#) video.



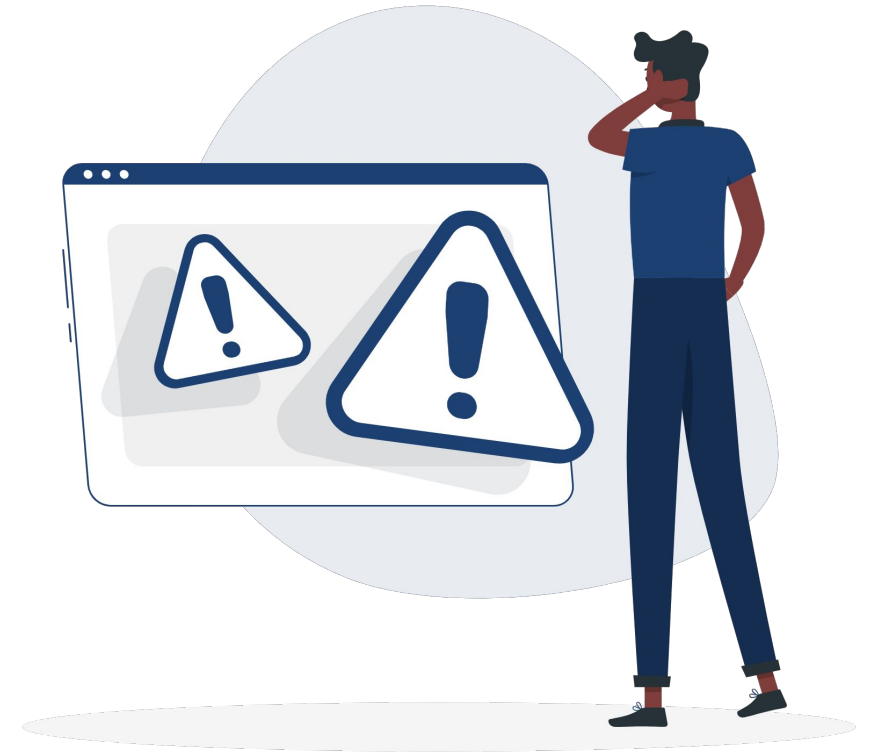
The screenshot shows the 'ADD CONTACT' form in the HMIS system. The 'CONTACT' tab in the top navigation bar is highlighted with a yellow box and the number '1'. The 'Client' dropdown menu is open, showing options: 'Client', 'Emergency Contact', 'Client Supplied', 'Case Manager', and 'Secondary Contact'. The 'Client' option is highlighted with a blue bar and a yellow box with the number '2'. Below the dropdown is a phone number field with the placeholder 'XXX-XXX-XXXX'. There are toggle switches for 'Active Contact' (turned on) and 'Private' (turned off). A 'Contact Date' field with a calendar icon is present. A text area for 'Note' has a rich text editor toolbar with 'B', 'I', and other icons. At the bottom are 'SAVE CHANGES' and 'CANCEL' buttons. A red text box at the bottom of the form reads: 'Please ensure client contact information is updated.'

# CES Enrollment and Referral Errors

The HMIS Helpdesk has received an influx of tickets relating to CES referral errors and would like to share some guidance to avoid these errors.

CES enrollment and exit data should not be modified unless the user has identified an error in a client's CES program. When users edit historic data they may unintentionally prevent clients from appearing in CES reports.

Agency Administrators should reach out to the HMIS Helpdesk if they need guidance to determine if a correction should be processed or if a new CES enrollment is needed.



# CES Enrollment and Referral Errors

One of the most common errors users receive when referring clients to the Community Queue is in regards to the Head of Household (HoH).

The HoH is the client within the household that must have a completed CES assessment to be sent to the Community Queue. In addition, the HoH must also be set as the HoH within the CES enrollment.

For veteran households, the veteran client should be set as the HoH for the household to be included in the Veteran Registry.

When a referral has expired the user can use the current assessment to send the referral back to the queue. New assessments should only be created if a client wishes to update their preferences. The HoH's latest assessment is what is used to send the referral to the queue.

**61** DAYS ACTIVE PROGRAM

Program Type: Group (5)

Program Start Date: 01/03/2024

Assigned Staff:

Head of Household: Homer Simpson

### Program Group Members

Marge Simpson	01/03/2024	Active
Bart Simpson	01/03/2024	Active
Lisa Simpson	01/03/2024	Active
Maggie Simpson	01/03/2024	Active

# Adding Households to the Bed Reservation Community Queue

In order for a household to be considered for any units that become available that become available, the Head of Household (HoH) must have the following:

- An active enrollment in an Individual Coordinate Entry System (ICES) or Family Coordinated Entry System (FCES) project in HMIS
- A Homeless Verification or Chronically Homeless Verification form on file in HMIS
- A completed Current Living Situation Assessment
- A *Needs Bed Reservation Assistance* service entered by the Access Point in HMIS
- A completed Bed Reservation Assessment

When all of the criteria are met, the household will be considered for placement when an opportunity becomes available.

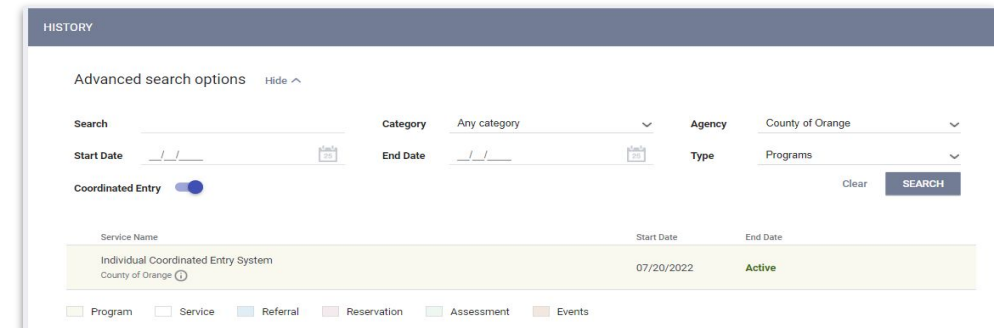
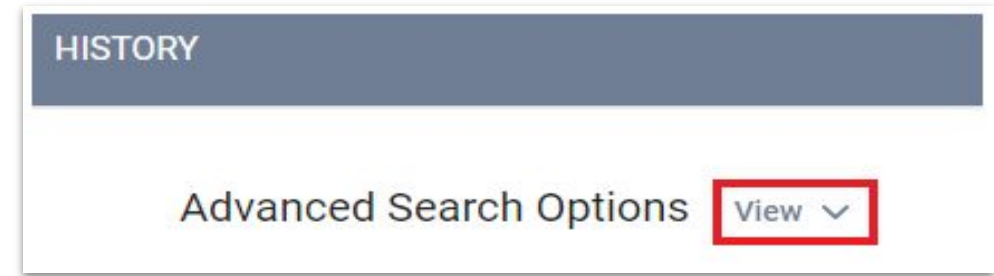


Graphic by: <https://storyset.com/online>

# Adding Households to the Bed Reservation Community Queue (2)

Before you can add a household to the Bed Reservation Community Queue, you must first ensure that the household is enrolled in either an ICES or FCES project.

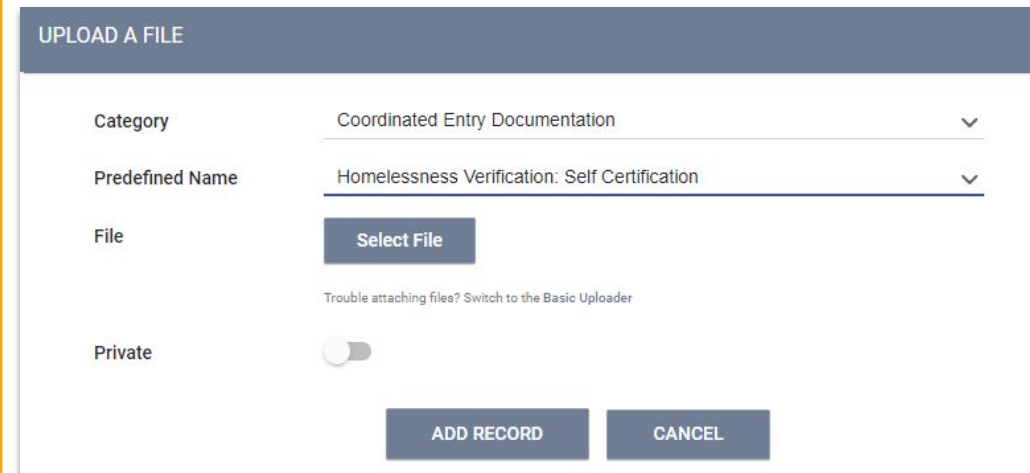
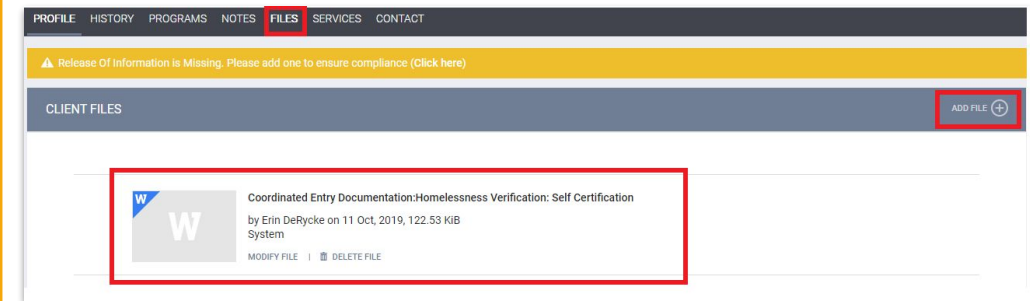
1. Search for the HoH in HMIS, and navigate to the client's *History* page
2. Click on the *View* dropdown button, change the *Type* dropdown to *Programs*, and click on *Search* to narrow the client's history to project enrollments.
  - a. The Access Point should review the [Enrolling Clients in a Project](#) KB for instructions on how to enroll a household in a CES project.



# Adding Households to the Bed Reservation Community Queue (3)

The HoH needs a *Homeless Verification* or *Chronically Homeless Verification* document uploaded to HMIS to be eligible for shelter opening.

1. Navigate to the HoH's *Files* page, to confirm whether or not this file has already been uploaded. If it has not been uploaded, click on *Add File*.
2. Change the *Category* dropdown to *Coordinated Entry Documentation*, and select the type of verification that has been received from the HoH. Select the location of the file on your computer, and click on *Save Changes*.

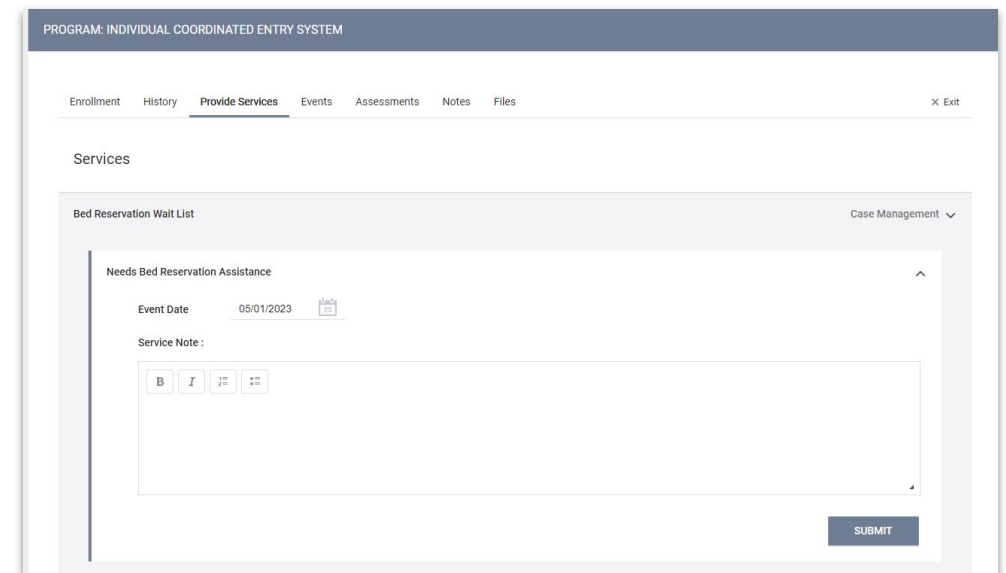
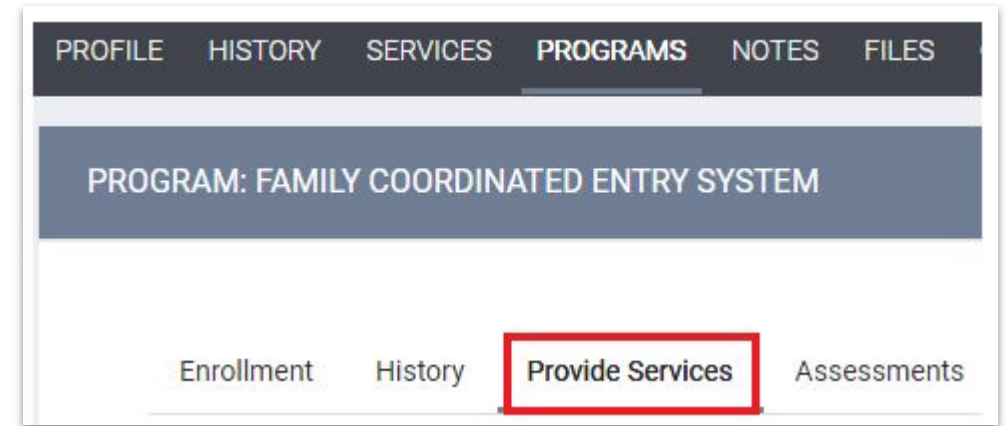




# Adding Households to the Bed Reservation Community Queue (4)

A *Needs Bed Reservation Assistance* service is required for the household to be considered for units. Users should recognize that a new Bed Reservation Service needs to be added every week the client wants to be considered for a unit.

1. Navigate to the *Provide Services* tab under the HoH's CES enrollment.
2. Click on the caret next to Bed Reservation Waitlist service, then click on the Needs Bed Reservation Assistance caret. The household will be considered for any units that become available only for the next seven days following the Event Date.



# Adding Households to the Bed Reservation Community Queue (5)












The HoH must have a completed Bed Reservation Assessment and Current Living Situation Assessment in order to be added to the Bed Reservation Community Queue.

1. Navigate to the HoH's *Assessment* tab under their CES enrollment, and click on *Start* next to the *[OC Custom] Individual Bed Reservation Assessment* or *[OC Custom] Family Bed Reservation Assessment*.
2. Answer the assessment questions, and click on the *Save* button.
3. Navigate to the *Assessment* tab under their CES enrollment, and click *Start* next to *Current Living Situation Assessment*

PROGRAM: FAMILY COORDINATED ENTRY

Enrollment History Provide Services **Assessments** Notes Files Forms

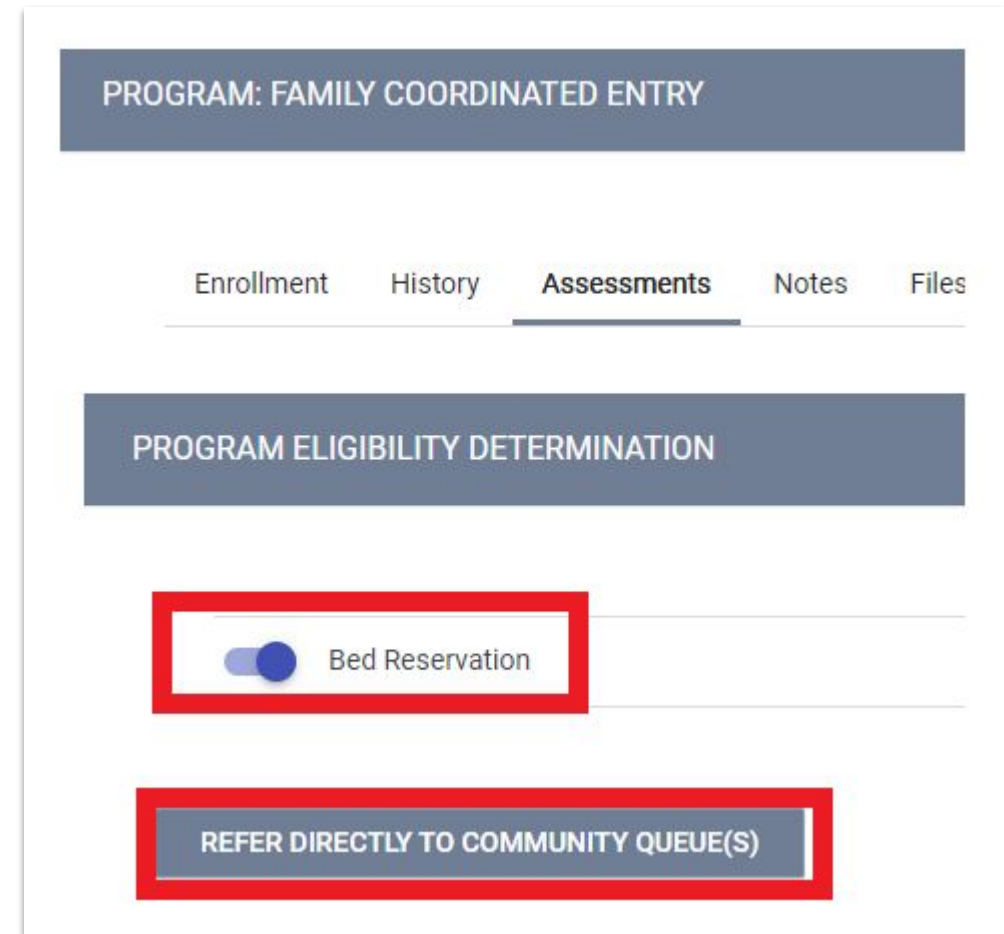
[OC CUSTOM] FAMILY BED RESERVATION ASSESSMENT

Assessment Date	10/03/2022 
Assessment Level	Select 
Assessment Location	Select 
Assessment Type	Select 
Is your household willing to go to a shelter anywhere in Orange County?	Select 
Has anyone in the household ever been convicted of a felony?	Select 
Is any adult in the household a registered sex offender?	Select 
Does the household require any special accommodations?	Select 
If yes, please describe	<input type="text"/>
Does your household currently include a child that is younger than 6 years old?	Select 
Are there at least two clients in the household that are age 18 or above?	Select 
Is anyone in the family currently pregnant	Select 

# Adding Households to the Bed Reservation Community Queue (6)

Once all prerequisites have been met, the household can be added to the Bed Reservation Community Queue. To add the household to the Community Queue, click on the checkbox next to the completed *Bed Reservation*, and click *Refer Directly to Community Queue*.

Users can refer to the [Adding Households to the Bed Reservation Community Queue](#) KB for more detailed information.



# Demo: Adding Households to the Bed Reservation Community Queue

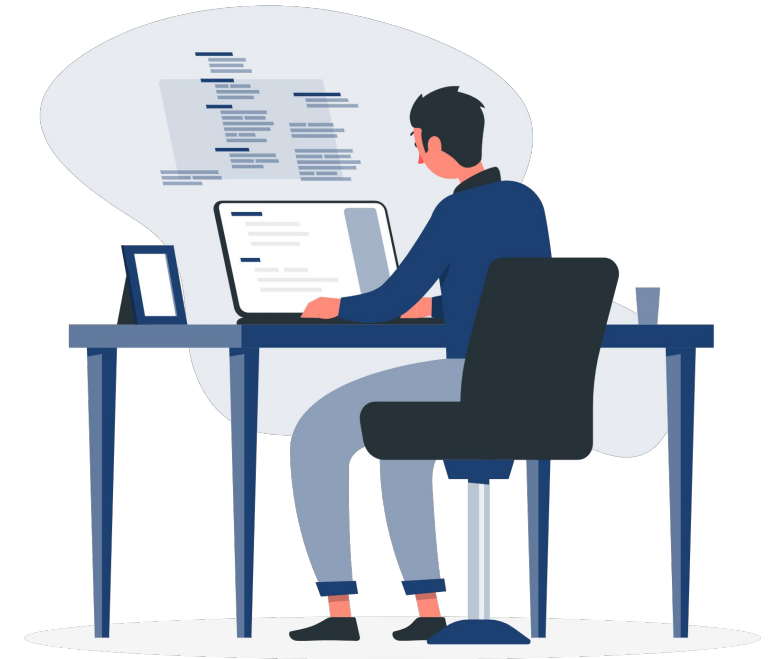
1. Ensure the Household is Enrolled in the Individual CES or Family CES Project
2. Upload the Head of Household's Homelessness Verification into HMIS
3. Add a Current Living Situation
4. Add the Needs Bed Reservation Service
5. Complete the Bed Reservation Assessment and Send Referral to Bed Reservation Queue
6. If a household still needs Bed Reservation assistance after seven days, enter a new service under the HoH's CES enrollment with new Event Date to keep the referral active

# Managing Household Composition Changes in the CES

A household experiencing homelessness is enrolled into the Coordinated Entry System (CES) to be linked to housing services. In very rare cases, a household may be served by both the Individual and Family Coordinated Entry System. Events that can result in a change in household composition may include but are not limited to clients that become pregnant, a single adult merges households with another adult with a child, or children are permanently removed from the household.

There are 3 scenarios we will go over that will illustrate these changes in household composition.

For more information on this topic, please refer to the [Managing Household Composition Changes in the CES](#) KB



Graphic by: <https://storyset.com/online>

# Managing Household Composition Changes in the CES

## Scenario #1

The household is active in the CES project, has a change in household composition, and has not been matched to a housing project.

- If the household has not been matched to a housing project, the **Access Point** should [exit the CES enrollment](#)
- If the household is on the Community Queue (CQ), the **Access Point** will remove the household from the CQ and select Reassessed as the Reason for Removal.
- After exiting, the **Access Point** will enroll the household into the new CES project, reassess, and add the household to the CQ or connect the household to an appropriate sub-population specific Access Point if necessary. Inform the CES Administrators if assistance is needed with connecting the household to an appropriate Access Point.

REMOVE FROM QUEUE

Reason for Removal	Reassessed	As A Family
Queue Removal Date	07/01/2022	

SAVE CHANGES CANCEL

# Managing Household Composition Changes in the CES

## Scenario #2

The household is active in the CES project, has a change in the household composition, and has been matched to a housing opportunity.

- If the household is accepted into the housing project, the household will remain enrolled in the CES project and exited by the **Housing Provider** once the household is placed into a housing unit.
- If the household is seeking Bed Reservation assistance while they wait for their permanent housing placement, the **Access Point** will follow the steps below:
  - The **Access Point** will notify the CES Administrator that household is being enrolled in two CES projects at the same time.
  - The **Access Point** will add a note in the original referral to indicate the household will be seeking shelter under a separate CES.
  - [Enroll the household](#) into the appropriate CES and [complete the Bed Reservation Assessment](#).

# Managing Household Composition Changes in the CES

## Scenario #3

The household is active in the CES project, has a change in household composition, and has been matched to a housing opportunity.

- If the household is [denied the housing opportunity](#), the household will be exited from the CES project and removed from the Community Queue by the **Access Point**. After exiting, **the Access Point** will [enroll the household into the new CES project, reassess, and add the household to the CO](#).

KB: [Managing Household Composition Changes in the CES](#)



# Update to HMIS User Account Form

An update has been made to the HMIS Account Update Form

A pop-up question will appear on the form when the 'Read Only' Access Role option is selected regarding the user's need to be added to the CES mailing list.

In addition to the HMIS Part training, users will also be required to complete the HIMS CES online training course if the user's work responsibilities require participation in the CES Match Meetings.

**This HMIS User Is: \***

- A new HMIS User
- Completing HMIS training again due to inactivity
- An existing and active HMIS user who needs Agency Administrator access
- An existing and active HMIS user who needs access to the Individual Coordinated Entry System
- An existing and active HMIS user who needs access to the Family Coordinated Entry System
- An existing and active HMIS user who needs access to both Family and Individual Coordinated Entry Systems
- An existing and active HMIS user who needs access to my agency
- An existing and active HMIS user who needs a different access role (specify change of access role in comments)
- No longer employed by our agency
- No longer in need of access to HMIS as part of their primary job duties
- Other

**Has this user ever had an HMIS account at any agency that has participated or is participating in OC HMIS? \***

Yes  No

**Access Role Needed: \***

- HMIS User
- Agency Administrator
- Read Only
- Other

**Does this Read Only Access User need to participate in CES Match Meeting? If Yes, the user will need to complete CES Training Course.**

Yes  No

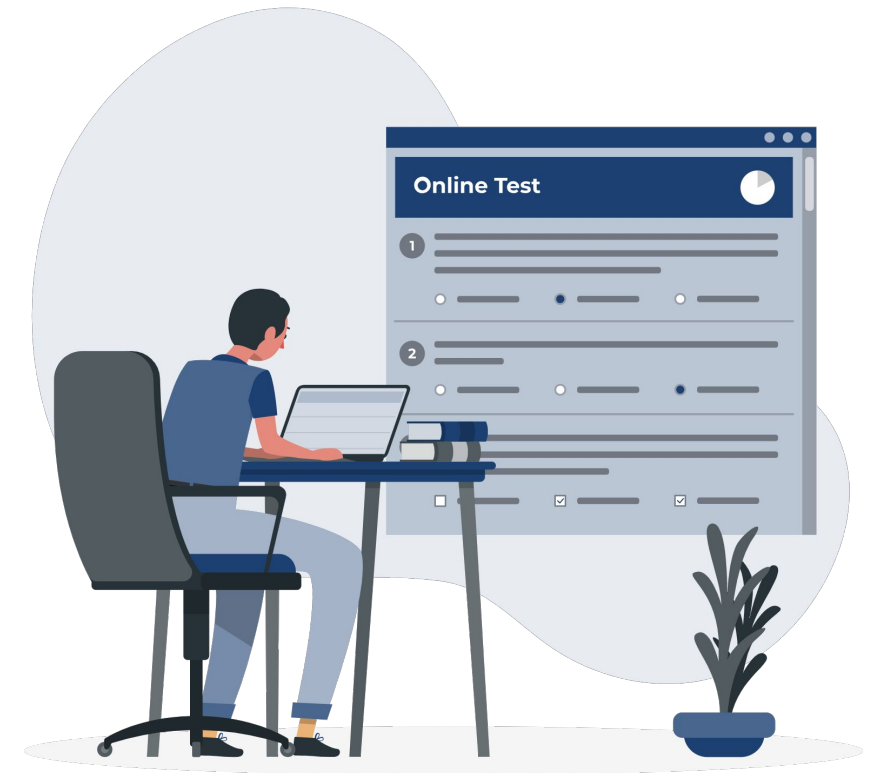
**Additional Comments:**

# HMIS Part 2 Recertification Deadline

HMIS users that have not yet completed their HMIS Recertification will have 60 days (March 22nd) from lock out to complete the HMIS Part 2 Recertification.

After the 60 days, HMIS users will be considered inactive and will need to retake **HMIS Part 1**, **HMIS Part 2**, and the **HMIS Skills Test** in order to have their account reactivated.

The HMIS Agency Administrator will need to notify the HMIS Helpdesk to reset the HMIS Part 1 and HMIS Part 2 training for each individual user.



Graphic by: <https://storyset.com/online>

# Status Assessments

You should conduct Status Assessments when any of the following change:

- Client disability status
- Income sources or amounts
- Household Composition (meaning someone leaves or joins the household in the project)

You can add as many Status Assessments as needed to account for each change in information. Status Assessments should be completed as of the day the client's information changes.

KB: [Status and Annual Assessments](#) & [Annual Assessment Due Report](#)



Graphic by: <https://storyset.com/online>

# Annual Assessments

HUD requires that clients who have been enrolled in a program for over a year be given an annual assessment. Annual assessments are meant to capture certain data points and are to be collected based on the Project Start Date of the Head of Household.

For Individual Enrollments: Conduct an Annual Assessment within the 30 day window before or after the client's one year anniversary of their Program Start Date, if they are still active as of one year from their Start Date.

- For example, if a client enters your project on January 1st, 2023 and they are still active as of January 1st, 2024, then you should complete and Annual Assessment no earlier than December 2nd, 2023 and no later than January 31st, 2024.

For Group/Family Enrollments: Every member will have their annual assessments conducted base on the HoH's project start date, if the members are still active as of one year after their Start Date.



Graphic by: <https://storyset.com/online>

# Annual Assessment Due Report

Data Analysis > Orange Clarity System Reports > [Annual Assessment Due](#)

Agency Name	Full Name	Project Type Code	Unique Identifier	Household ID	Project Start Date	Head of Household Project Start Date	Targeted Annual Assessment	Enrollment ID	Annual Assessment Status
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456A	251762	2023-06-07	2023-06-07	2024-06-07	286542	Assessment Window Opening in More Than 30 Days
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456B	250091	2021-08-04	2021-08-04	2022-08-04	284770	Past Due
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456C	249430	2023-03-17	2023-03-17	2024-03-17	284025	Due
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456D	249240	2023-04-11	2023-04-11	2024-04-11	283827	Assessment Window Opening in 30 Days or Less
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456E	249071	2023-07-03	2023-07-03	2024-07-03	283640	Completed out of range
Agency A	Project PSH A	PH – Permanent Supportive Housing (disability required for entry)	123456F	202046	2023-02-08	2023-03-07	2024-03-07	228630	Project Start Date before HoH Start Date

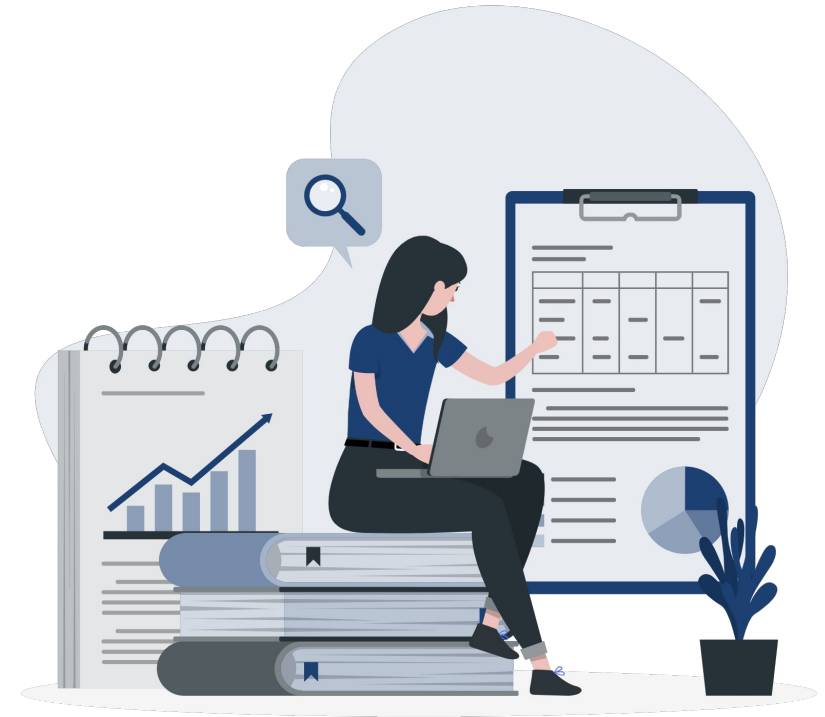
# Project Performance Reports

The Project Performance Report (PPR) for Homeless Prevention will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found at on the [Orange County HMIS](#) website: OCHMIS Website> Reports > [Project Performance Reports](#)

Permanent Supportive Housing and Other Permanent Housing PPR draft data will be uploaded into DropBox within the first week of March.

The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.

The quarterly Data and Performance Management Meeting is scheduled to resume Wednesday, May 8th at 10am.



Graphic by: <https://storyset.com/online>

# Resources and Training

The [HMIS Website](#) includes posting of upcoming community training and resources.

- [Client-Centered and Trauma-Informed Data Collection](#)
- [2024 HUD Innovations in Ending Homelessness Roundtable Series](#)
- [2024 VAWA and Survivor Housing Community Conversations: Building System-Wide Partnership](#)



Graphic by: <https://storyset.com/online>

# Q&A

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





Thank you  
Have a great day!

Next User Meeting: Apr 3rd





Throughout 2024, Orange County United Way is celebrating 100 years of impact in our community. We invite you to join us on our year-long Journey to 100 centennial celebration as we prepare for another century of caring for each other The OC Way. Learn more and see how you can get involved.

[UnitedWayOC.org/Journey-to-100](https://UnitedWayOC.org/Journey-to-100)