



Get Connected. Get Help.™

Welcome!

June 2024

OC HMIS User Meeting

JOURNEY 100



Agenda

1. LSA Overview
2. HIC and Sheltered PIT Update
3. HMIS Policies and Procedures
4. HMIS Agency Audit
5. Data Entry for Disabling Condition
6. Data Accuracy and Timeliness
7. Reassigning Case Managers
8. Removing Households from the Community Queue
9. CES Denial Data Entry
10. CES Clients Active with Service Provider & on CES CQ
11. CES Assessment Update
12. Project Performance Report
13. Resources
14. Holiday
15. Q&A
16. Office Hours

LSA Overview

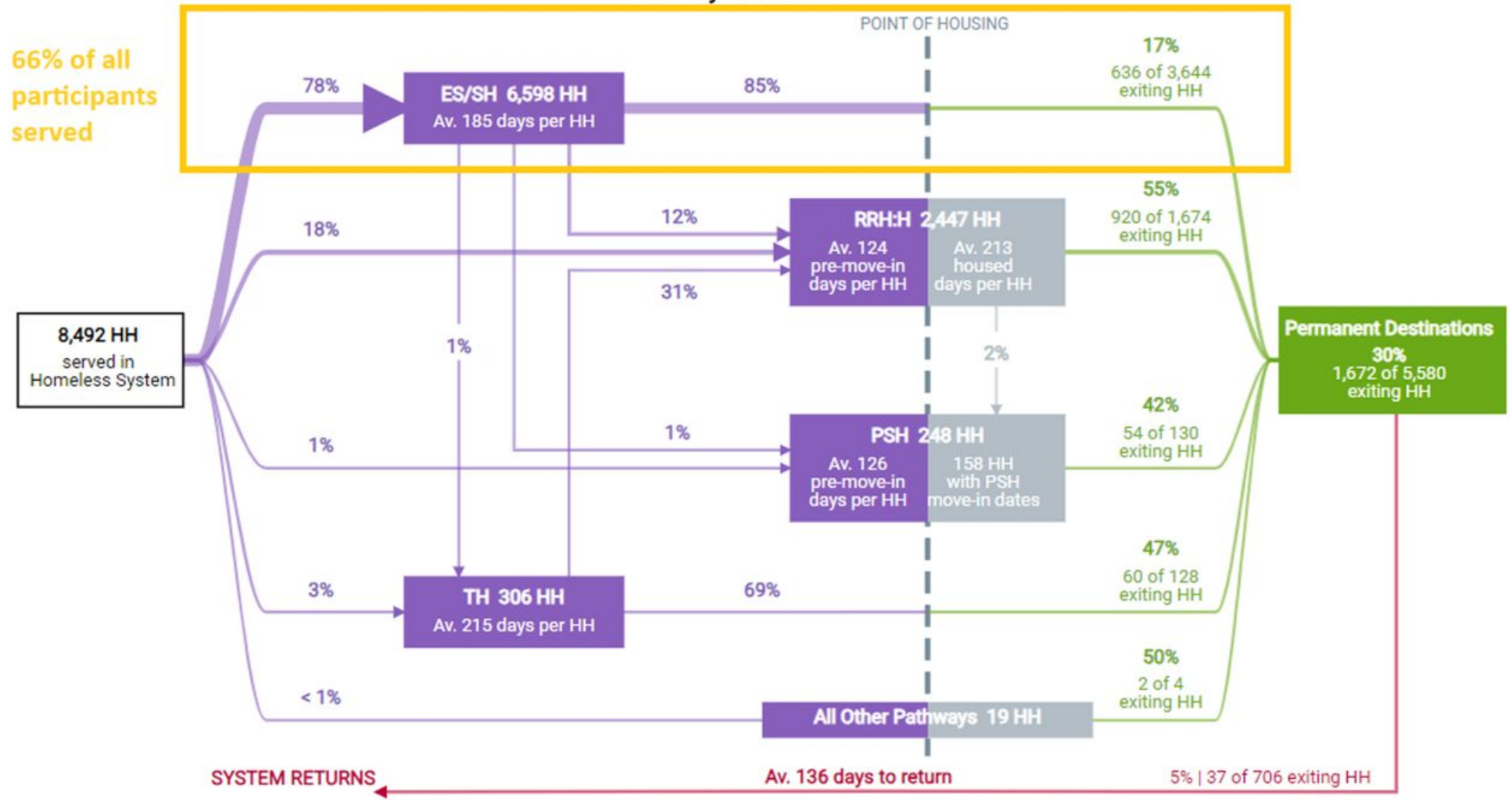
- HUD requires CoCs to measure their performance as a system on an annual basis and submit the results to HUD
- Reporting Period: 10/1/22 – 9/30/23
- HMIS Project Types
 - Street Outreach
 - Emergency Shelter
 - Transitional Housing
 - Permanent Supportive Housing
 - Rapid Rehousing
 - Other Permanent Housing
- Report is available at ochmis.org > Reports > [LSA \(Longitudinal Systems Analysis\)](#)

LSA Overview - System Map

- The System Map shows the different combinations of project types households may utilize while they are served in the homeless system of care, called pathways.
- The map displays performance metrics for each pathway, as well as the percentage of participants served.
- 66% of all clients served during the reporting period are only engaging in Emergency Shelter, and only 17% of these clients are exiting to permanent housing. Linking these clients with permanent housing will have the greatest positive impact for the largest number of participants.

■ Days Homeless
 ■ Days Housed
 ■ Exits to Permanent Destinations
 ■ Returns

188 Days Homeless



HIC and Sheltered PIT Updates

Thank you to all participating agencies for their support throughout the reporting period.

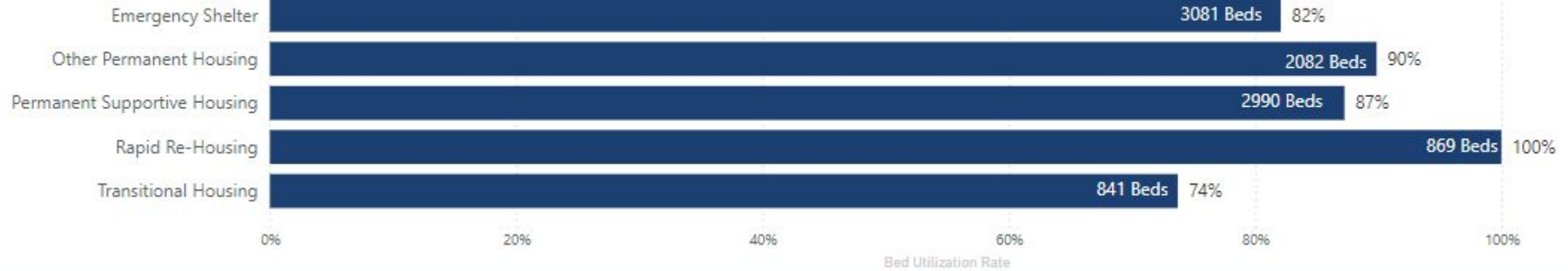
- HIC PIT Survey
 - We invite participating agency to share feedback regarding this year's review process.
 - HIC - Sheltered PIT Clarity Reports
 - Training
 - Review Process

HIC and Sheltered PIT Overview

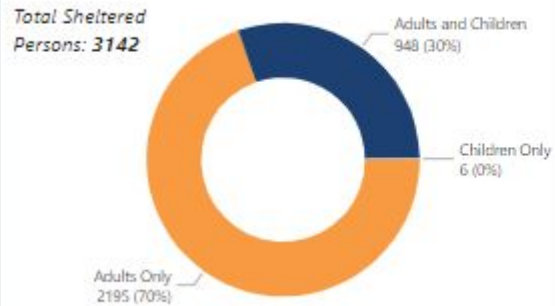
- HIC: Housing Inventory Count
 - HIC collects information about all of the beds and units in each Continuum of Care (CoC) homeless system, categorized by Project Type. Only beds dedicated to serve homeless clients should be counted on the HIC.
- PIT: Point-in-Time Count
 - HUD requires that CoC conduct an annual count of people experiencing homelessness who are sheltered in emergency shelter, transitional housing, and Safe Havens on a single night.
- PIT Date: January 22, 2024

HIC and Sheltered PIT Overview

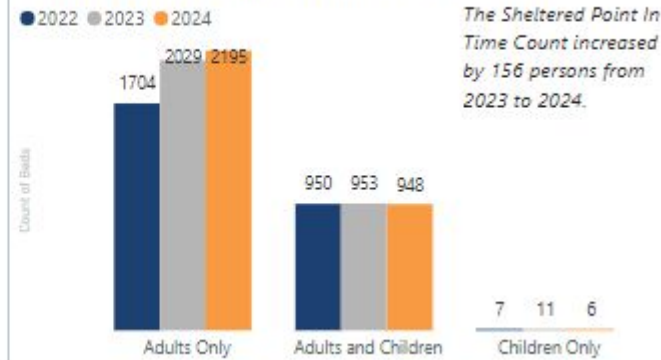
Bed Utilization *Includes year-round, seasonal, and overflow beds*



Sheltered PIT Count by Household Type



Sheltered PIT Count from 2022 to 2024



HMIS Policies and Procedures

[HMIS User Feedback needed](#) by EOD Friday, June 14th

- Develop training for new agencies joining HMIS
- Minimum term commitment to participate in the HMIS Agency Access Working Group
- Highlight agencies on the HMIS website that pass the agency audit on the first attempt
- Develop policy for agencies unresponsive to audits
- Agencies approved for HMIS access have 90 days to begin participating in HMIS
- Victim Service Providers receiving CoC Program funds or ESG Program funds may request up to five licenses for read-only access in HMIS for the purpose of care coordination

Thank you to the Working Group

- Families Forward
- Family Assistance Ministries
- Last is First Philanthropies
- PATH
- Pathways of Hope
- Mental Health Association
- Mercy House
- Salvation Army
- U.S. Veterans Initiative



2024 HMIS Agency Audits

- The HMIS Helpdesk Team will begin conducting agency audits for 2024.
- We will reach out to your agency 2 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.
- Please be on the lookout for our email to schedule your Agency Audit in July.



2024 HMIS Agency Audits

The following forms must be dated in 2024 and signed by leadership at the agency:

[Participating Agency Agreement](#)

[Inter-Agency Data Sharing Agreement](#)

All agencies must submit signed copies of the HMIS Participating Agreement and Inter-Agency Data Sharing Agreement. Current versions of both forms are available [on our website](#). Forms must be dated in 2022 and signed (wet signature) by leadership at the agency.

HMIS Participating Agency Agreement

Upload or drag files here.

Inter-Agency Data Sharing Agreement

Upload or drag files here.

Completed by 211OC

Test Agency's Active Users in HMIS

 [Test Agency Active Users.csv](#) 277 bytes 

Test Agency's Additional Agency Access in HMIS:

 [Test Agency Additional Agency Access.xlsx](#) 15.5 KB 

Test Agency's Program Descriptor Data for active projects in HMIS:

 [Test Agency Program Descriptor Data.csv](#) 1.1 KB 

Test Agency's Funding Source Data for active projects in HMIS:

 [Test Agency Funding Sources.csv](#) 886 bytes 

Test Agency's Bed Inventory Data for active projects in HMIS:

 [Test Agency Bed Inventory.csv](#) 1.4 KB 

Email addresses at Test Agency receiving emails from 211OC

 [Test Agency MailChimp Emails.xlsx](#) 8.9 KB 

2024 HMIS Agency Audits

You will need to review the attached files on the audit form. These reports contain information such as active users for your agency, active projects, current bed inventory, and users in your agency that are receiving correspondence from 211 OC.

Please review the reports and complete the audit form questionnaire 2 business days before your scheduled audit meeting.

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HMIS Participating Agency Agreement

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2024 HMIS Agency Audits

For this year's audits, agencies will receive new reports to review to verify for:

- Overlapping Enrollments
- HoH Errors
- Duplicate Records

We will ask that Agency Administrators review the reports uploaded in your agency's DropBox prior to their scheduled audit meeting and submit tickets to the HMIS Helpdesk to address the errors.



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Data Entry For Disabling Condition

The HMIS Helpdesk has observed instances where data entry for Disabling Condition have been entered incorrectly and causing errors:

- **Scenario 1:** 'Yes' to Disabling Condition But 'No' to disability types
- Clients that have a 'Yes' response to the Disabling Condition field must have a 'Yes' response to at least one of the specific conditions and specified as a Long Term disability

Taylor Swift

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

DISABLING CONDITIONS AND BARRIERS

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

▲ Disabling Condition is set to "Yes", but no disability type has been selected. Please update the Disabling Condition field or select at least one disability type, as appropriate.

Data Entry For Disabling Condition

Scenario 2: 'No' to Disabling Condition But 'Yes' to one of the disability types

In instances where a disability is indicated and specified as 'Yes' to being Long Term, the main Disabling Condition field must also be indicated as 'Yes'

If the disability is indicated and specified as 'No' to being Long Term, the main Disabling Condition field must also be indicated as 'No'

Taylor Swift

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

DISABLING CONDITIONS AND BARRIERS

Disabling Condition No

Physical Disability Yes Long Term Yes

⚠ You have selected "Yes" for Physical Disability but "No", "Client doesn't know", "Client refused", or "Data not collected" for Disabling Condition. Please correct the Disabling Condition field or the Long Term Physical Disability field, as appropriate.

Developmental Disability No

Chronic Health Condition No

HIV - AIDS No

Mental Health Disorder No

Substance Use Disorder No

Domestic Violence Victim/Survivor Select

DISABLING CONDITIONS AND BARRIERS

Disabling Condition No

Physical Disability Yes Long Term No

Data Entry For Disabling Condition

Exceptions for when Long Term does not need to be indicated occur when either the Developmental Disability or HIV - AIDS field are specified as 'Yes.'

Please review the [Disabling Condition Field](#) Knowledge Base Article.

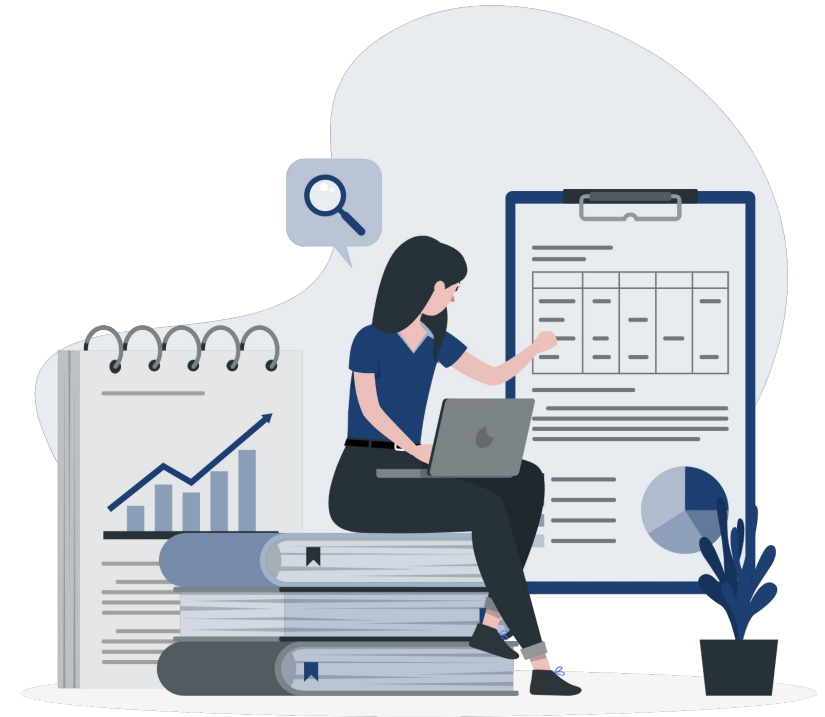
DISABLING CONDITIONS AND BARRIERS	
Disabling Condition	Yes <input type="checkbox"/>
Physical Disability	Select <input type="checkbox"/>
Developmental Disability	Yes <input type="checkbox"/>
Chronic Health Condition	Select <input type="checkbox"/>
HIV - AIDS	Yes <input type="checkbox"/>

Data Accuracy and Timeliness

Data in HMIS is meant to reflect real information of clients in a consistent manner. To maintain good data quality users should focus on maintaining good data accuracy and data timeliness.

Data accuracy referring to the degree in which HMIS data reflects real-world clients and events is achieved by correctly entering real information clients provide into HMIS. This can be accomplished by:

- Verifying clients responses align with HUD standards
- Verifying clients information provided reflects their real-life circumstances
- Verifying that information users enter into HMIS matches what clients report



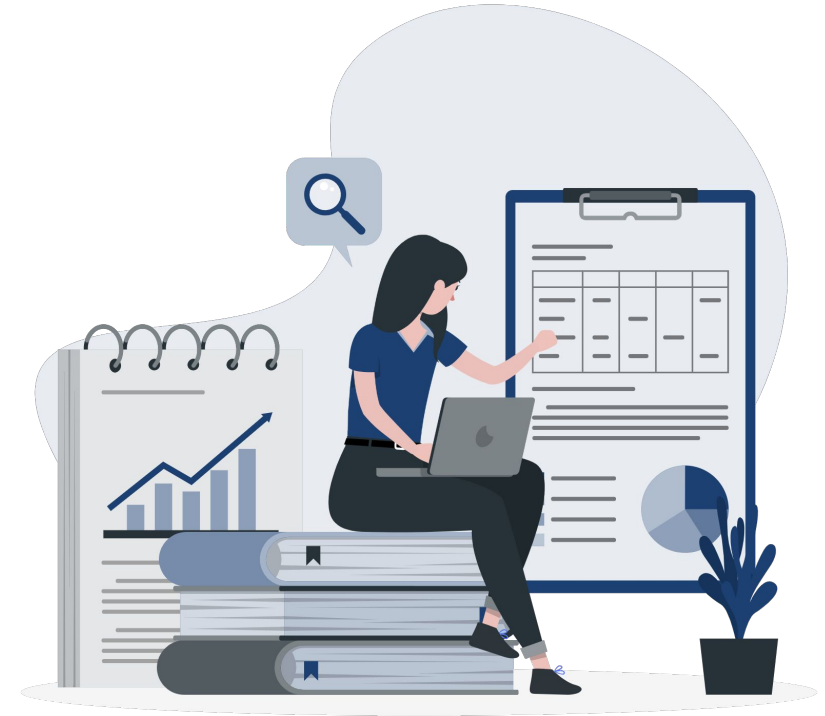
Graphic by: <https://storvset.com/online>

Data Accuracy and Timeliness (Cont.)

Data timeliness referring to the degree in which data collected in HMIS is available for viewing is achieved by entering clients data into HMIS as soon as it's collected. This can be accomplished by:

- Entering data into HMIS no later than 3 days after it has been initially collected
- Reviewing the [Data Timeliness reports](#) once a month and making changes to collection processes based on those reports

More information about this topic can be found in our [Agency Administrator and Data Quality Training](#) KB article



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Reassigning Case Managers at a Partner Agency

Users who need to provide services to a client served by a partner agency will need to switch their agency access over to change the assigned staff to themselves.

1. Change your agency access from your primary agency over to your secondary agency using the agency drop-down menu
2. Search for the client's *Client Profile* record, and select the *edit* icon
3. Go to the client's *Program* tab and edit the Program by selecting the *edit* icon next the the enrollment.
4. Locate the *Assign Staff* section of the program, and click on the *edit* icon to the right of the name.



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

Reassigning Case Managers at a Partner Agency (Cont.)

5. A drop down menu will appear that has a list of all the active staff at the agency. Choose yourself from among the list, and select *Save Changes*.

NOTE: Users who switch over to a partner agency will only be able to see a list of users at that agency. Agency Administrators will not be able to reassign case managers from one agency to another, case managers themselves must do so.

For more information about this topic, please review our [Reassigning Case Managers](#) KB article

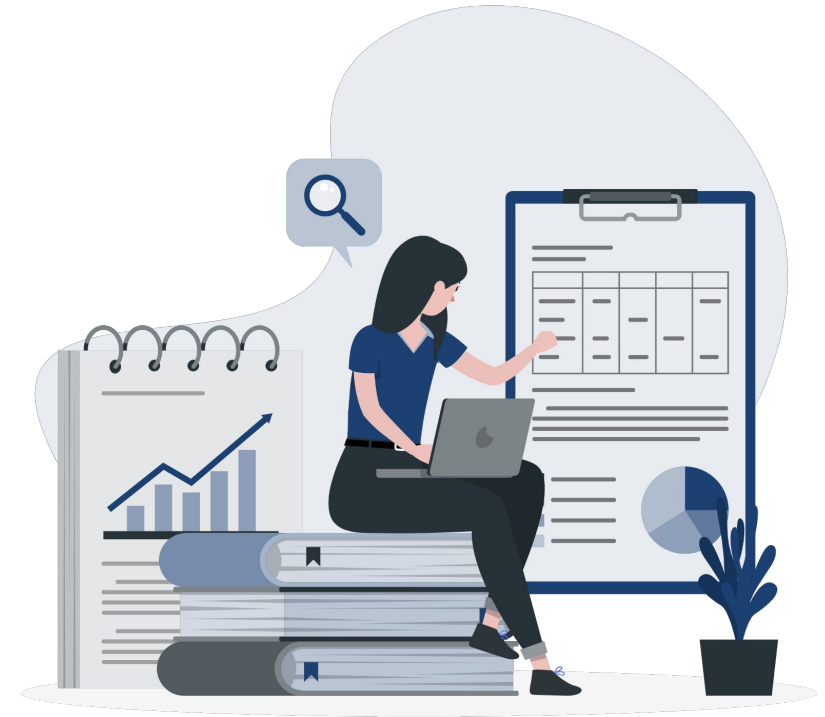


Graphic by: <https://storyset.com/online>

Removing Households from the Community Queue

When a household no longer needs to be matched with a housing opportunity through CES, the household should be removed from the *Community Queue*.

1. Search for the HoH's name, and click on the *Edit* button. Once located, go to their *History* page.
2. Click the *Edit* button next to their *Referral* to the *Community Queue*.
3. Scroll to the *Remove from the Queue* section on the referral page, and select the reason the household is being removed. Remember to add the date the household was removed from the *Community Queue*, and click on *Save Changes*.
4. Navigate to the exit screen and close out the CES enrollment



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

Removing Households from the Community Queue Demo



CES Denial Data Entry

The table below outlines the possible reasons for denial, and whether the reason for denial should be considered a denial by the Housing Provider or the Client.

	A	B	C
1	Reason for Denial	Client	Housing Provider
2	Client Deceased	X	
3	Client did not show up or call	X	
4	Client out of Jurisdiction	X	
5	Client previously received service		X
6	Client refused services	X	
7	Denied by Lanlord/Property Manager		X
8	Disagreement with rules provided	X	
9	Falsification of Documents	X	
10	Full Capacity/No availability		X
11	Incorrect match to agency		X
12	Lack of Eligibility		X
13	Needs could not be met by program	X	
14	Referral time expired		X
15	Self resolved- Client Housed	X	
16	Voucher Expired	X	
17	Other	X	X



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

CES Denial Data Entry Demo

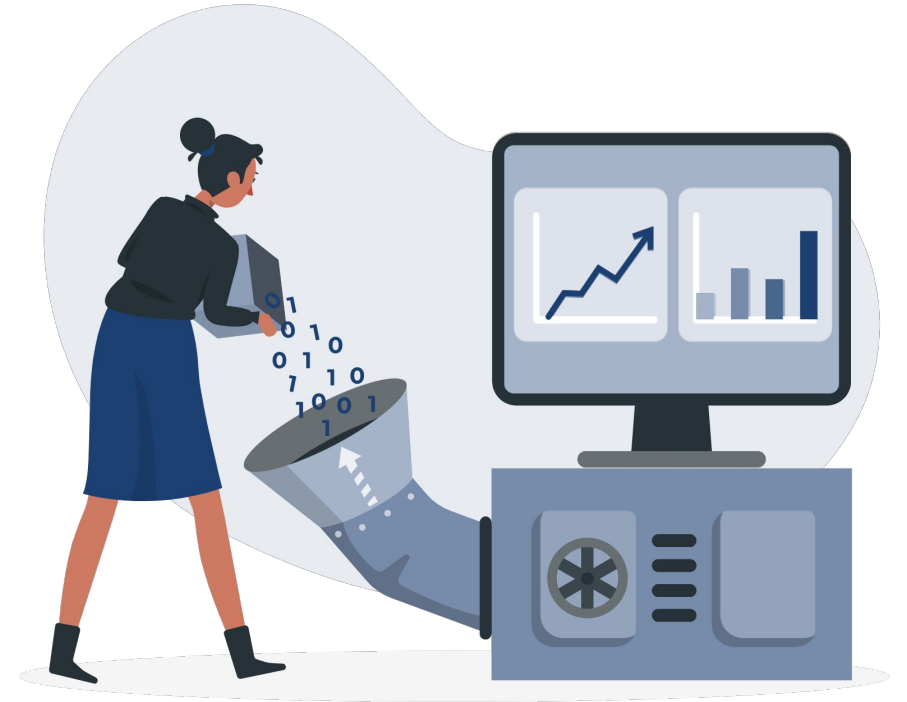
CES Clients Active with Service Provider & on CES CQ

This report lists all clients active in a project at the Service Provider's agency, and whether or not that client is currently on the Coordinated Entry Community Queue. The report includes the project name, project type, and project start and end dates for the client's current enrollment at the service provider's agency whether or not the client is on the CES CQ and the date they were added, as well as the client's responses to the CES assessment questions.

Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry

[Coordinated Entry Reports KB Article.](#)

[Coordinated Entry Report Attachment.](#)



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

CES Clients Active with Service Provider & on CES CQ cont.

Agency Enrollment and Client Profile Data

Clients Unique Identifier	Clients Client Full Name	Service Provider Project Name	Service Provider Project Type	Service Provider Start Date	Service Provider End Date	Clients Current Age	Clients Veteran Status
		Agency A - ES	Emergency Shelter - Entry Exit	6/4/2024		29	No
		Agency A - ES	Emergency Shelter - Entry Exit	6/4/2024		44	No
		Agency A - SO	Services Only	4/24/2024		60	No
		Agency A - SO	Services Only	8/16/2023		69	No

CES Clients Active with Service Provider & on CES CQ cont.

Coordinated Entry System Data

On CES CQ (Yes / No)	Enrollments Project Start Date	Date Added to CQ	Clients Last Activity Date	Client Assessments Assessment Date	Assessment Name	Client Assessment Custom Housing Choice Voucher (Yes / No)	Client Assessment Custom Permanent Supportive Housing (Yes / No)	Client Assessment Custom Rapid Re-Housing (Yes / No)	CES Disability Status	CES Chronically Homeless Status	CES Enrollment within 30 days of Program Enrollment Y/N	Client File Names	Disability and CH Documentation
Yes	6/4/2024	3/11/2024	6/4/2024	3/10/2024	Individual CES Assessment	No	No	Yes	No	No	Yes	Birth Certificate, Driver's License or State ID Card, Homelessness Verification: Third Party, Social Security Card	No
Yes	6/4/2024	1/3/2024	6/4/2024	9/22/2022	Individual CES Assessment	Yes	Yes	No	Yes	Yes	Yes	Chronic Homelessness Verification, Client Revocation of Consent Form, Disability Verification: Verification from Licensed Professional, Driver's License or State ID Card, Food Stamp Card or Award Letter, Homeless Verification, Homelessness Verification: Third Party, Social Security Card, verification of homelessness	Yes
Yes	6/3/2024	5/16/2024	6/3/2024	6/3/2024	Individual CES Assessment	Yes	Yes	No	Yes	Yes	No	Chronic Homelessness Verification, Disability Verification: Disability Check, Disability Verification: Verification from Licensed Professional, Driver's License or State ID Card, High Utilization of Health Care Certification, Homelessness Verification: Third Party, Social Security	Yes
Yes	6/3/2024	6/29/2023	6/3/2024	6/29/2023	Individual CES Assessment	Yes	Yes	No	Yes	Yes	No	Birth Certificate, CES Authorization Form, Chronic Homelessness Verification, Disability Verification: Verification from Licensed Professional, Driver's License or State ID Card, Homelessness Verification: Third Party, Photo ID Card, Social Security Card	Yes

CES Documents

The HMIS Helpdesk team has updated our website to include a page for users to quickly locate important CES documents.

Users can find these documents on our website by navigating to:

HMIS Forms and Documents >> Client Data Collection Forms
>> CES Documents

Other important CES partner documents and resources can be found on at the following web address:

<https://ceo.ocgov.com/page/ces-partner-documents-and-resources>



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

CES Assessment Update

The CoC Board approved the additional of Accessibility Questions to the CES Assessments.

The updated forms are available on the OC HMIS Site.

- [Individual Housing Needs Assessment](#)
- [Family Housing Needs Assessment](#)

HOUSING INTEREST INFORMATION

OF THE HOUSING OPPORTUNITIES THE HOUSEHOLD IS ELIGIBLE FOR, WHICH OF THE FOLLOWING HOUSING TYPES IS THE HOUSEHOLD INTERESTED IN?

Rapid Re-Housing

Housing Choice Voucher

Permanent Supportive Housing

ACCESSIBILITY NEEDS


IF YOU, OR ANYONE IN YOUR HOUSEHOLD, HAVE A DISABILITY, YOU MAY NEED ACCESSIBLE HOUSING. THIS MAY MEAN YOU NEED RAMPS OR WIDER ENTRANCES, SPACE FOR MEDICAL EQUIPMENT OR A WHEELCHAIR, OR SPECIAL LIGHT SWITCHES, ELECTRICAL OUTLETS, AND OTHER FIXTURES.

IF YOU, OR ANYONE IN YOUR HOUSEHOLD, NEED ACCESSIBLE HOUSING, YOU WILL ONLY BE CONSIDERED FOR HOUSING OPTIONS THAT CAN MEET YOUR NEEDS. THERE WILL BE MORE HOUSING OPTIONS AVAILABLE TO YOU IF ACCESSIBILITY IS NOT A CONCERN.

IF YOU HAVE NEEDS NOT COVERED BY THESE QUESTIONS, PLEASE LIST THEM AT THE END OF THE ASSESSMENT.

Do you require a mobility accessible unit due to a physical disability?

Do you require a sensory accessible unit due to loss of hearing or sight?

Do you require some accommodations but not all the features of an accessible unit? 

PLEASE INDICATE YOUR NEEDS BELOW:

A. no stairs

B. grab bars

C. seat in tub or shower

D. other

Is there anything else about your accessibility needs that we should know?

SELECTING THE PRIVATE CHECKBOX MEANS ONLY USERS WITH ACCESS TO THE CURRENTLY SELECTED AGENCY WILL BE ABLE TO SEE THIS ASSESSMENT.

Private

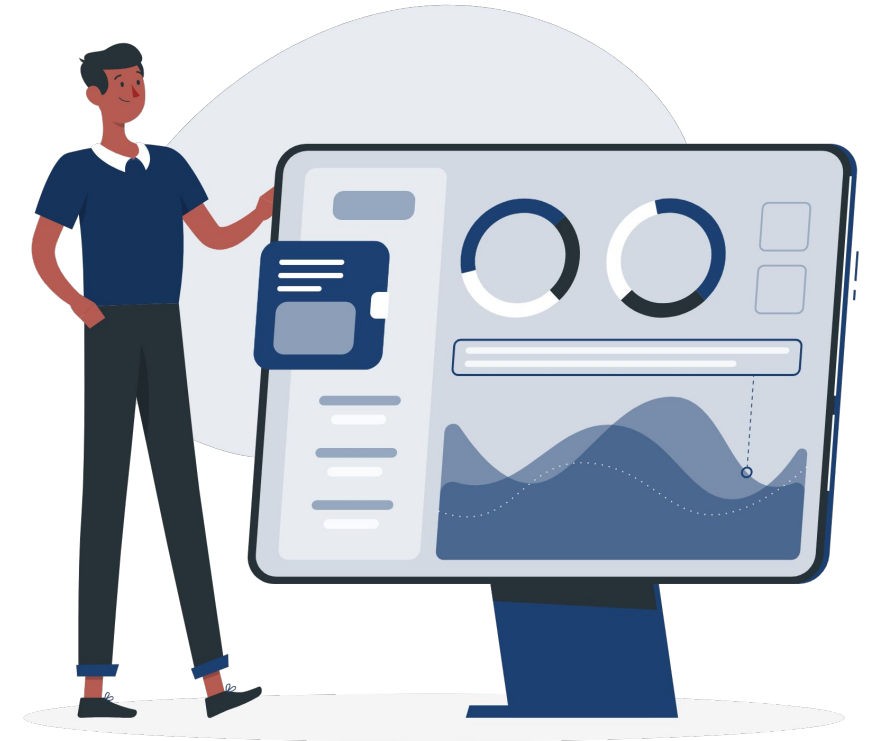
SAVE CANCEL

Project Performance Reports

The Project Performance Report (PPR) for Transitional Housing 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](#)

Corrections for the Emergency Shelter PPR draft data will be uploaded into DropBox in the upcoming weeks.

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.



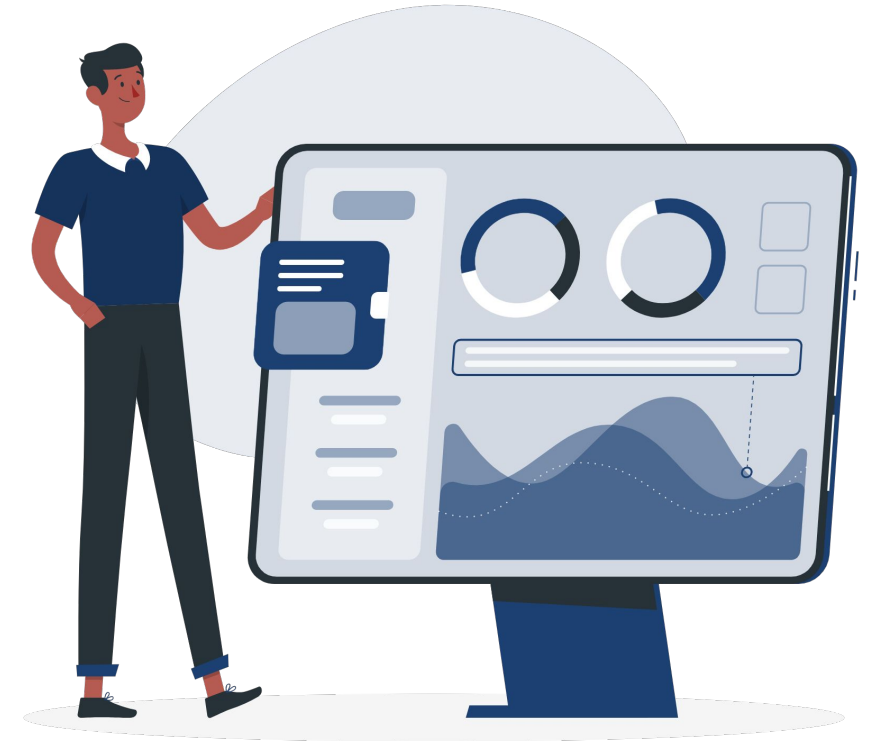
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Resources

The HUD Exchange has launched its [Unsheltered Homelessness resource collection](#) which provides assistance materials to providers who serve households who experience unsheltered homelessness. Some featured resources available of note are:

- [Lessons Learned from Outreach Workers](#)
- [Unsheltered Data Collection Strategies: Case Studies](#)
- [Housing-focused Street Outreach Webinar Series: Building Blocks](#)

In addition, the HUD Exchange is also hosting its [Rapid-Rehousing: A Proven Approach to End Homelessness Webinar](#) on June 20th, at 3:00 - 4:30 PM E.T./12:00 - 1:30pm P.T.



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

Holiday Observed

The HMIS Help Desk will be closed on **Thursday, July 4th** in observance of **Fourth of July**.

We will be back in the office the following business day to assist you on **Friday, July 5th**.



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

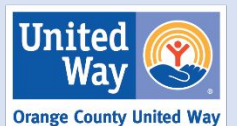
Q&A

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



Thank you
Have a great day!

Next User Meeting: July 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