OC HMIS User Meeting Webinar Minutes
05/07/25

Contents

Agenda Items

New Staff Update

Welcome to our new HMIS Data Analyst, Hannah Chang!

HMIS Participating Agencies Schedule

Housing Inventory Count (HIC) & Sheltered Point in Time (PIT)

- Update as of 05/13 - HDX 2.0 is open for HIC/Sheltered PIT submission. The HMIS Team will reach out to agencies that participated in 2025 HIC/Sheltered PIT to review their agency data and HDX data.

HMIS Agency Audit

- Scheduling June - December

Assign CES Case Manager

The Assigned Staff of the active CES enrollment are those who are primarily responsible for the CES navigational support of the CES enrolled client which includes any CES coordination and housing match communication.

Though other CES Access Point agencies can collaboratively offer navigational support, it is the Assigned Staff's responsibility. Over time, the Assigned Staff may need to be updated to reflect which staff is taking the lead for CES navigation.

- If you do not know who to reach out to coordinate the transfer of the Assigned Staff for the CES enrollment, please contact the CES Lead/Admin Team to provide next steps. **Do not** assign to another staff from the list without CES Lead/Admin Team's guidance.

If you are aware of another partner agency that is actively working with the participant, please reach out to discuss a warm hand off process with the participant. After care coordination is completed and it was determined, the new primary Access Point will transition to take on the responsibilities to support the client under the CES enrollment. The following steps will be taken by the new primary Access Point:

Please note this is similar to partner agency assigned staff changes, the staff that will transition to take lead on the support will update the Assigned Staff field directly.

1. Switch to the County of Orange agency from your primary agency.
2. Search for the client and select the client.
3. Go to the CES enrollment under the programs tab and click the edit pencil.
4. In the sideboard section to the right, click the edit pencil next to Assigned Staff.
5. Choose yourself from the list, and click Save Changes.
6. Navigate to the enrollment screen and update the Access Point over to your agency. Click Save & Close.

Some examples of when to update the assigned CES case manager are outlined in the 'Reassigning the Case Manager' Knowledge Base Article.

Pre-Assessment Screening Form Update

Updates have been made to the Pre-Assessment Screening Form/Tool. Some of these updates include adding language to the emotional, verbal, and psychological abuse definition section.

This form can be accessed on the OC HMIS website by navigating to: HMIS Forms and Documents > Client Data Collection Forms> CES Documents

Adding Documents to a Client's Record

Users are able to add client documentation in HMIS which can help streamline the process for reviewing eligibility and connecting clients to housing opportunities. It is important to review the uploaded documents to verify the correct document label is selected. If users find any errors with the label, ensure to edit the label to reflect the uploaded document. More information about this topic can be found on our [Adding Documents to a Client's Record] KB article

Bed Reservation Workflow

Households can only be considered for placement in available Emergency Shelter/Transitional Housing opportunities if the Head of Household (HoH) is enrolled in the Bed Reservation system.

Before a household can be added to the Bed Reservation system, users should first verify that the HoH is enrolled in either the Individual CES or Family CES program. And ensure the following are also completed to send the household to the Bed Reservation Queue and to keep the household active until they are matched to a shelter opportunity:

1. Upload a Homeless Verification or Chronically Homeless Verification Form on file in HMIS
2. Complete Current Living Situation Assessment
3. Complete Bed Reservation Assessment
4. Add a Needs Bed Reservation Assistance Service
    a. The HoH's Needs Bed Reservation Assistance service must be **renewed every week** the household wants to be considered for housing opportunities.

For more information on this process, please refer to the following Knowledge Base articles:

- Enrolling Clients in a Project
- Adding Households to the Bed Reservation Community Queue
- Completing Current Living Situation Assessments

Maintaining Households on the Community Queue

While a household is on the Community Queue, their case manager should be checking in with them regularly. If a household is on the Community Queue for more than 90 days with no activity, the referral will be automatically removed. In order to keep households active on the Community Queue a case manager can do any of the following:

- "Check-In" on the Referral page
- Add a Note to the Head of Household's record
- Update the Current Living Situation
- Add a Coordinated Entry Event

For more information on this process, please refer to the Maintaining Households on the Community Queue KB.

CES Clients Active with Service Provider & on CES CQ Report

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 and list of uploaded CES documents.

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

Users are encouraged to run this report to ensure the data is accurate. If your agency's participants are not listed, review to ensure enrollments are active and complete data clean up as needed. Review the list of documents, if any verification document is missing upload the pending documents.

For more information, please refer to the Coordinated Entry Reports KB and CES Reports.

Training and Resources

Introduction to Looker Training; Wednesday, May 28th, 11am - 12:30pm

Deeper Dive Into Looker Training; Thursday, May 29th, 1pm - 2:30pm

Users must register in advance to attend. Navigate to the OC HMIS Calendar for the registration links.

Data and Performance Management Meeting

Wednesday, May 14th @ 10am - 11am
Meeting ID: 857 7837 0017
Passcode: 463529

Quarterly Report Review and Discussion:
- Project Performance Reports (PPR): Emergency Shelter, Street Outreach, Homelessness Prevention
- Q1 Data Quality Report Card (DQRC)
- CoC Dashboard

Proposed Data Standards Changes

During the HMIS Leads webinar on April 16, 2025, there was an announcement that Gender and Sexual Orientation data elements will be retired October 1st. Sex will be added as a new Program Specific Data Element.
- Vendors have been instructed not to map Gender data to the new Sex data element.
    - Agencies may need to collect the Sex data element for active clients as of 10/01.

  - The HMIS Community will learn more about this when the Data Standards are officially released.
- CoC Board will determine whether or not the OC CoC should continue to collect the Gender and Sexual Orientation data elements after 10/1, and the HMIS Team will share that decision with the users when it is made.
- Agencies should continue to collect the data elements available in HMIS, as these data elements reflect the published FY2024 HMIS Data Standards.

2025 Agency Audits

- The HMIS Helpdesk Team will begin conducting agency audits for 2025.
- 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 June. We will be scheduling audits throughout the summer and fall months to accommodate all the agencies.

Survey

Our HMIS Helpdesk Team invites users to complete the HMIS User Meeting Survey. Please let us know what topics you're interested in reviewing in the upcoming monthly meetings.

Holiday

The HMIS Helpdesk will be closed on Monday, May 26th in observance of Memorial Day. We will be back in office the following business day to assist you.

Q&A

Assign CES Case Manager

General guidance - Before assigning yourself as the Assigned Staff under the CES enrollment, ensure that you've coordinated with the previous assigned staff to determine it's appropriate for you to transition to be the new Assigned Staff to support the participant. If you're unable to determine who to reach out to coordinate support, please reach out to the CES Lead/Admin Team for further guidance and assistance.

- Q: Who should we reach out to if our case managers are not listed as an option?
  - A: When users click the drop-down list to reassign the CES case manager, they will only see the Office of Care Coordination staff and themselves. The staff taking over as the CES case manager is responsible for reassigning the role to themselves directly.

- Q: How will this impact emails sent out regarding client CES matters?

  - A: Reassigning the CES case manager will not affect the emails sent out about CES matchers. It can affect/improve coordination between the CES Administrative staff and CES Access Points assisting the client when there are questions or issues with the client's CES navigation. Staff taking over the CES case manager role are encouraged to contact the CES Administrative staff to confirm if any CES documentation or navigational tasks are pending.

- Q: Is adding a CES case manager new?
  - A: The Assigned Staff function within Clarity is not new, the information added to the 'Reassigning the Case Manager,' Knowledge Base Article is expanded to include guidance around Assigned Staff under CES and encourage staff to ensure the CES enrollment reflects updated information for the user that is working with the participant in CES.

Bed Reservation Process

- Q: If the client is matched to the shelter opportunity through the bed reservation. Will the ICES Enrollment be exited or left enrolled for the shelter to reassign ICES under them. If they are exited from ICES, what is the process for that? Do we enroll them in a New ICES or reopen the existing one?
  - A: Our HMIS Team will be reaching out to the CES Lead/Admin Team for additional guidance and will share that information in the meeting min.
  - Additional guidance: All CES enrollments should remain active as long as there is communication within the 90-day timeframe with the household. In cases where a participant is matched to a Bed Reservation opportunity, there is communication within 90 days, and is enrolled into the matched program, the Street Outreach/Services Provider is encouraged to support with a warm hand off to the Emergency Shelter Provider. The Emergency Shelter Provider will update the CES enrollment to be the new primary Access Point.

- Q: If the clients are already in an emergency shelter they can not be added to the bed reservation?
  - A: For more information about OC Bed Reservation System Policies and Procedures navigate to the OC Office of Care Coordination's Bed Reservation Page. Please reach out to the CES Leads and Admin teams when you need support in coordinating care for a specific client.

- Q: Our Data Team has been reassigning clients working with other active agencies but the agency is not very fond of this decision. What information can we provide them to share this procedure of reassigning the client to the next active agency?
  - A: Clarity does not have the functionality to reassign case managers under partner agency, this includes County of Orange. Please review the Reassigning the Case Manager KB for additional guidance. Agencies are encouraged to reach out to the partner agency to coordinate a warm hard off as needed. The partner agency must reassign the participant directly to themselves. If there is not another active agency working with the participant, please reach out to the CES Lead/Admin Team for further assistance.

CES Clients Active with Service Provider & on CES CQ Report

- Q: This is a new report/dashboard, correct? I'm not able to see all the information shown on the report. Are upload documents shown?
  - A: Our HMIS Team added new topics to the HMIS User meeting to highlight reports we believe are helpful for users to review. This dashboard is not new, but we wanted to highlight and share as a fresher for users to use the reports as needed. Also for any new users, we like to share reports so users can find these reports they may not be aware of.

Maintaining Households on the Community Queue

- Q: When should users consider completing a Current Living Situation Assessment versus another check-in option?
  - A: The Current Living Situation Assessment should be completed before the end of 90-days since last contact OR completed whenever the household's living situation changes from one living situation type to another (e.g. shelter to hospital or shelter to street). Please review the Current Living Situation Assessment Knowledge Base Article for additional details on the Current Living Situation Assessment data element.

- Q: If users are completing a Current Living Situation Assessment every 90-days, do they also need to complete any other type of "check-in" to keep the household active on the CES Community Queue?
  - A: To a household active on the CES Community Queue, only one of the four check-in actions are required. Entering a Current Living Situation Assessment would be sufficient on its own to keep a household active on the Community Queue. Please review the Maintaining Households on the Community Queue Knowledge Base Article for additional guidance on the check-in options.

Proposed Data Standards Changes

- Q: Have you heard any information on new data standards around race/ethnicity categories or will those stay the same?
  - A: The OC HMIS team has not received any updates on race/ethnicity categories yet. We will share with the community as updates are shared. At the latest meeting, Abt Global only shared the data element we shared today around gender and sexual orientation.

Client Consent Form

- Q: If a client already has an active HMIS consent but is enrolling into a new program, is the general guidance to obtain a new HMIS consent during intake or is it not needed as long as the HMIS consent is still active?

  - A: It's best practice to review the HMIS consent form with the participant when they are newly enrolled into an agency's program. There is an option to add additional ROI. Please review the Accessing and Completing Release of Information Knowledge Base Article.

Other

- Q: Will the meeting recording be shared by email later?
  - A: Yes, we will send a recap newsletter and the recorded materials are on our website: https://ochmis.org/meetings/user-meeting-minutes/.

Future Meeting Information

June 2025 HMIS User Meeting Webinar

- Date: Wednesday, June 4th, 2025
- Time: 10:00 AM - 11:00 AM
- Click here to join the meeting! No registration or RSVP is required.
- All User Meeting webinar recordings and meeting minutes are available on our website.
- Have an idea for a future agenda item? Submit a ticket via the HMIS Help Desk using the “Feedback” category with your ideas.