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Welcome!

May 2025

OC HMIS User Meeting



Agenda

1. New Staff Update
2. HMIS Participating Agencies Schedule
3. Assign CES Case Manager
4. Pre-Assessment Screening Form Update
5. Adding Documents to a Client's Record
6. Bed Reservation Workflow
7. Maintaining Households on the Community Queue
8. CES Clients Active with Service Provider & on CES CQ Report
9. Training and Resources
10. Project Performance Report
11. Data and Performance Management Meeting
12. Proposed Data Standards Changes
13. 2025 Agency Audits
14. Survey
15. Holiday
16. Q&A
17. Office Hours

Meeting materials and recording will be available on the [OC HMIS website](#)

Q&A



To better organize questions the HMIS Help Desk receives during the meeting, our Team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the meeting.

Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

New Staff Update

Please welcome Hannah Chang
as our HMIS Data Analyst!



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HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule



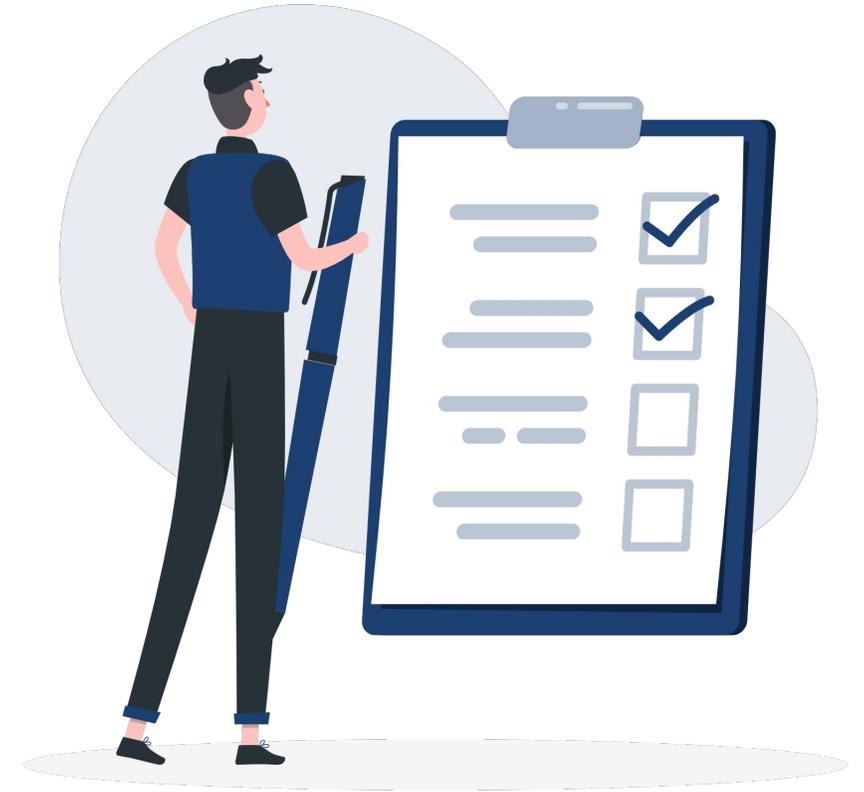
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March												
	Longitudinal Systems Analysis (LSA)	October	December	January	April												
	Housing Inventory Count (HIC)	January	February	April	May												
	Sheltered Point in Time (PIT)	January	February	April	May												
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January												
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December												
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November												
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September												
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October												
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November												
Orange County Requirement	Agency Audits	June	Specific to each agency	n/a	n/a												
	HMIS User Recertifications	July	August	n/a	n/a												
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Wednesday @ 10:00	n/a	n/a	n/a												

[HMIS Participating Agency Schedule](#)



HMIS Participating Agencies Schedule

- Housing Inventory Count (HIC) & Sheltered Point in Time (PIT)
 - Pending Updates from HUD when HDX 2.0 opens for HIC/Sheltered PIT submission
 - Pending final HMIS and HDX data review
- HMIS Agency Audit
 - Scheduling June - December



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Assigning Coordinated Entry System (CES) Case Manager

CES case managers 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 CES Case manager's responsibility.

Over time, the CES case manager may need to be updated to reflect which staff is taking the lead for CES navigation.

After care coordination is complete and it was determined, the new primary Access Point will transition to take on the responsibilities to support the client under the CES enrollment.



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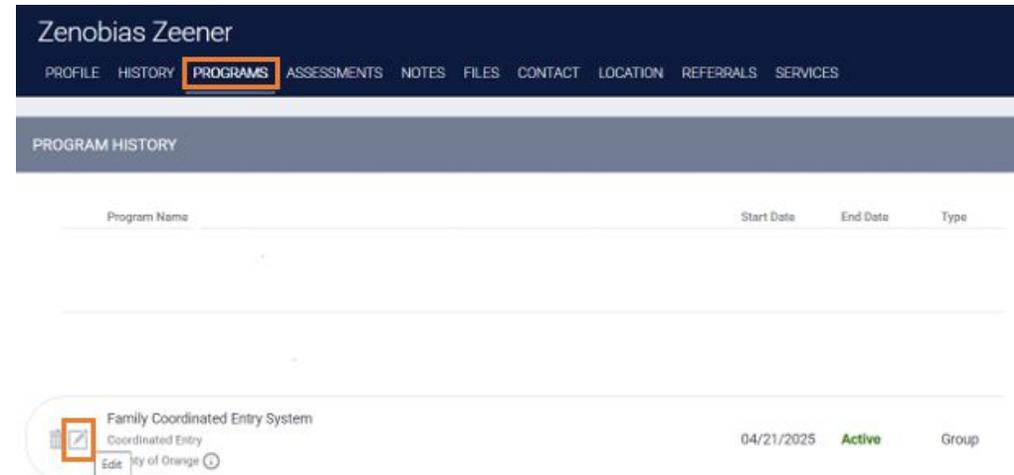
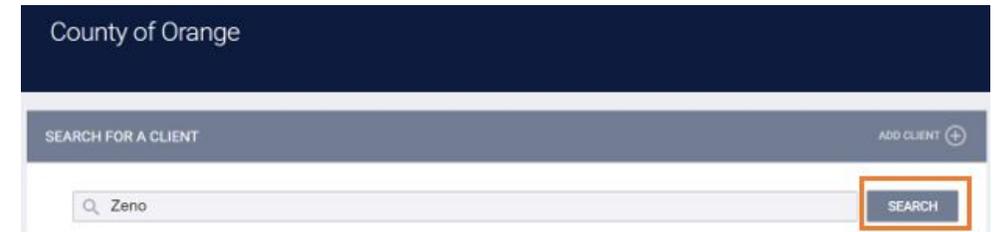
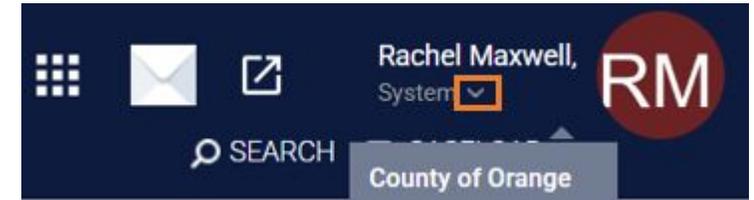
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Assigning Coordinated Entry System (CES) Case Manager

Step 1: **Switch** to the County of Orange agency from your primary agency.

Step 2: Search for the client and **select** the client.

Step 3: Go to the CES enrollment under the programs tab and click the **edit** pencil.



Assigning Coordinated Entry System (CES) Case Manager

Step 4: Under this section you will see a sidebar section to the right, click the ***edit pencil*** next to Assign Staff.

Step 5: Choose yourself from the list, and click ***Save Changes***.

The screenshot displays a web interface for managing a Coordinated Entry System (CES) program. At the top, a green header indicates '1 DAYS ACTIVE PROGRAM'. Below this, the 'Program Type' is set to 'Individual' and the 'Program Start Date' is '05/06/2025'. A dropdown menu titled 'CHANGE ASSIGNED STAFF' is open, showing a list of staff members with checkboxes. 'Rachel Maxwell' is selected with a blue checkmark. Other options include 'County of Orange Training Agency' and 'Elizabeth Duong'. Below the dropdown, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. The 'SAVE CHANGES' button is highlighted with an orange border.

Program Type:	Individual
Program Start Date:	05/06/2025
CHANGE ASSIGNED STAFF	
Make Program Private	<input type="checkbox"/>
Rachel Maxwell	▼
<input type="checkbox"/>	County of Orange Training Agency
<input checked="" type="checkbox"/>	Rachel Maxwell
<input type="checkbox"/>	Elizabeth Duong

SAVE CHANGES **CANCEL**

Assigning Coordinated Entry System (CES) Case Manager

Step 6: Navigate to the enrollment screen and update the Access Point over to your agency. Click **Save & Close**.

If you do not know who to assign as a case manager, please contact the CES Lead/Admin Team to provide next steps.

For additional information, please review the [KB](#) on reassigning Case Managers, link included in the chat.

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

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment History Provide Services Events Assessments Notes Files Forms

Household member with city tie (Select all that apply) Self (Head of Household) ▼

Which individual access point is serving this household? Agency 2 ▼

Select
Agency 1
Agency 2
Agency 3
Agency 4
OC Training Agency

Have you or someone in your family ever been legally evicted?

How many legal evictions?

SAVE & CLOSE CANCEL

Adding CES Case Manager

DEMO



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 [our website](#) by navigating to: [HMIS Forms and Documents](#) > [Client Data Collection Forms](#) > [CES Documents](#)

CES Documents

Coordinated Entry - Pre-Assessment Screening Tool

[Pre-Assessment Screening](#)

Download

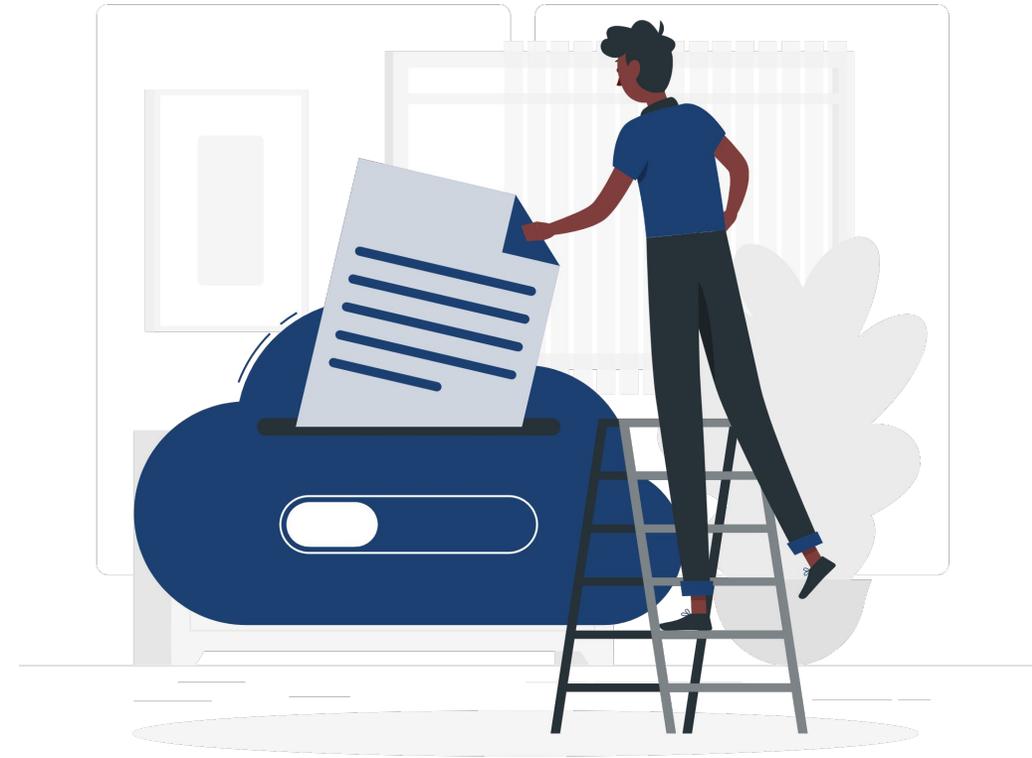
Pre-Assessment Screening

Adding Documents to a Client's Record

Users are able to add client documentation in HMIS which can help streamline the process for connecting clients to housing opportunities.

General documentation such as ID, DL etc. can be added to a client's record for cross-agency use. To add documents to a client's record:

1. Navigate to the client's **client profile**
2. Switch to the **file tab**, and click on the **add file** icon
3. Add the appropriate file, and complete the **category** and **predefined name** fields. Click on the **save changes** button to save the document



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Adding Documents to a Client's Record

Specific documentation related to project eligibility requirements can be added to a client's project enrollment for internal use. To add documents to a client's project enrollment:

1. Navigate to the client's **client profile**
2. Switch to the **programs tab**, and click on the **edit** icon next to the specific project that needs documentation
3. Switch to the **files subtab**, and click on the **add file** icon
4. Add the appropriate file, and complete the **category** and **predefined name** fields. Click on the **save changes** button to save the document

More information about this topic can be found on our [Adding Documents to a Client's Record](#) KB article



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Bed Reservation Process

Households can only be considered for placement in available CES housing opportunities if the Head of Household (HoH) is enrolled in the Bed Reservation system. To accomplish this, a HoH must have:

1. An active enrollment in either a Individual Coordinated Entry System (ICES) or Family Coordinated Entry System (FCES) project
2. A **Homeless Verification** or **Chronically Homeless Verification Form** on file in HMIS
3. A completed **Current Living Situation Assessment**
4. A completed **Bed Reservation Assessment**
5. A **Needs Bed Reservation Assistance** service



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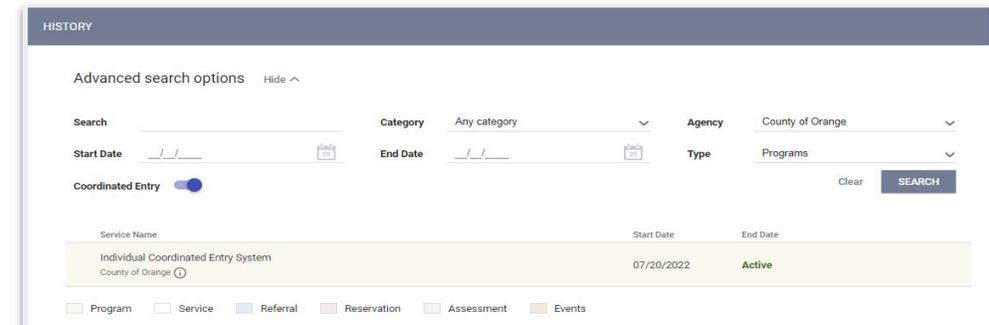
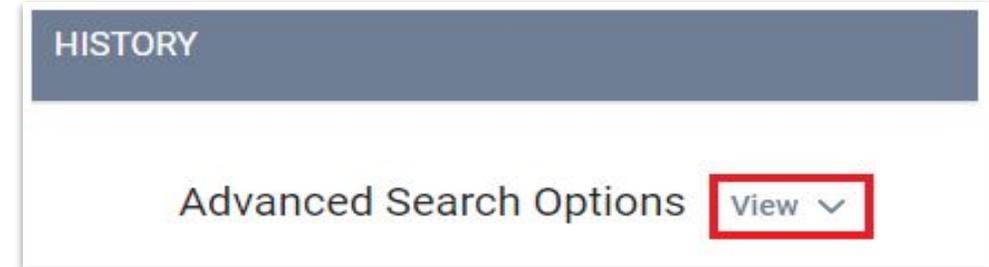
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Bed Reservation Process

Before a household can be added to the Bed Reservation system, users should first verify that the HoH is enrolled in either an ICES or FCES project

1. Navigate to the HoH's **client profile**, and then switch to their **history tab**
2. Utilize the **view** dropdown button, and change the **type** search field to "programs". Click **search** to refine the client's history to include only project enrollments
3. Verify the HoH is enrolled in an ICES or FCES project

NOTE: If the HoH is not enrolled in either an ICES or FCES project, access point staff can enroll the HoH into the appropriate project by utilizing our [Enrolling Clients in a Project](#) KB article

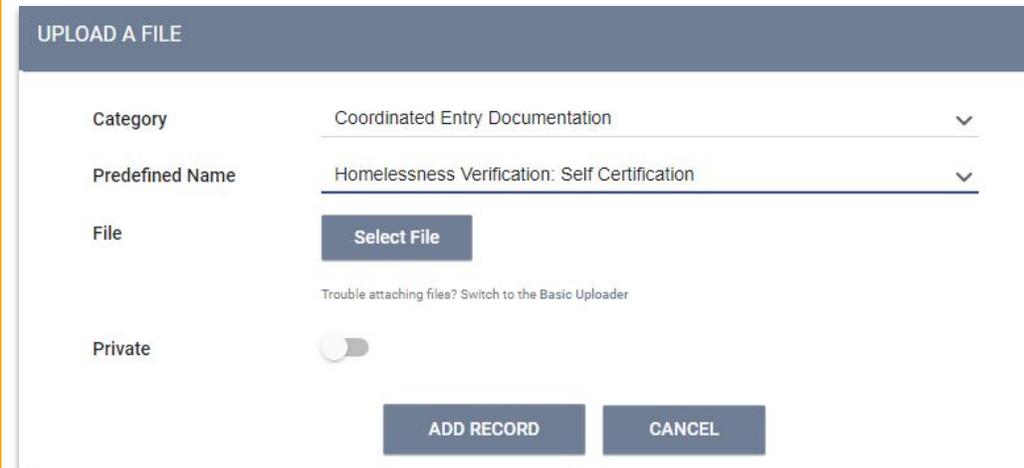
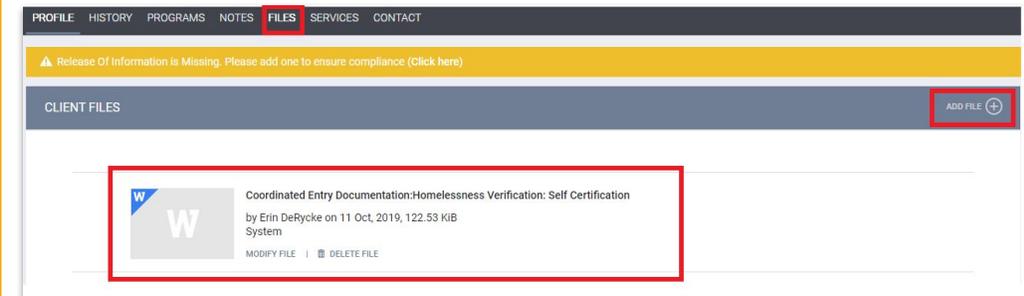


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Bed Reservation Process

In order for a household to be considered for available housing opportunities, the HoH must have either a **Homeless Verification** or **Chronically Homeless Verification Form** uploaded to their client record

1. Navigate to the HoH's client profile, and then switch to their **files tab**
2. Verify that the file has been uploaded, if not then click on the **add file** icon to upload the document
 - a. When uploading the file change the **category** dropdown field to "Coordinated Entry Documentation", and select the type of verification that has been received by the HoH. Click **add record** to save the changes.



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

Bed Reservation Process

The HoH must have a completed **Bed Reservation Assessment** and **Current Living Situation Assessment** in order for the household be added to the Bed Reservation system

1. Navigate to the HoH's **assessment subtab** within their CES enrollment, and click on the *start* button next to the **[OC Custom] Individual Bed Reservation Assessment** or **[OC Custom] Family Bed Reservation Assessment**
2. Answer all the assessment questions, and click on the **save** button
3. Repeat this process to navigate to and complete the **Current Living Situation Assessment**

NOTE: Users can refer to the [Completing Current Living Situation Assessments](#) KB article for additional help

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 

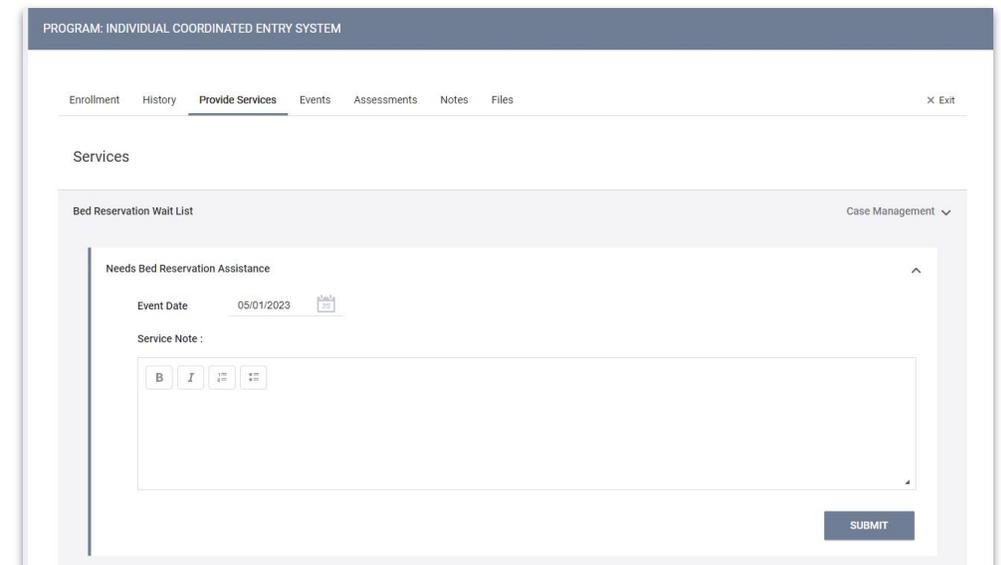
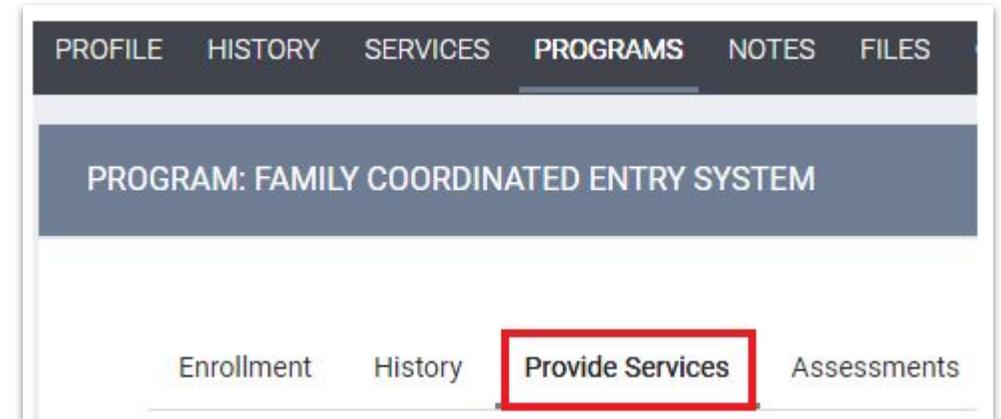
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Bed Reservation Process

The HoH must have a **Needs Bed Reservation Assistance** service for the entire household to be considered for available housing opportunities

1. Navigate to the HoH's **provide services subtab** within their CES enrollment
2. Click on the caret next to the **Bed Reservation Waitlist** service, and then navigate to the **Needs Bed Reservation Assistance** service item. Ensure the **event date** is accurate, then click on the **submit** button to save the service

NOTE: The HoH's **Needs Bed Reservation Assistance** service must be renewed every week the household wants to be considered for housing opportunities



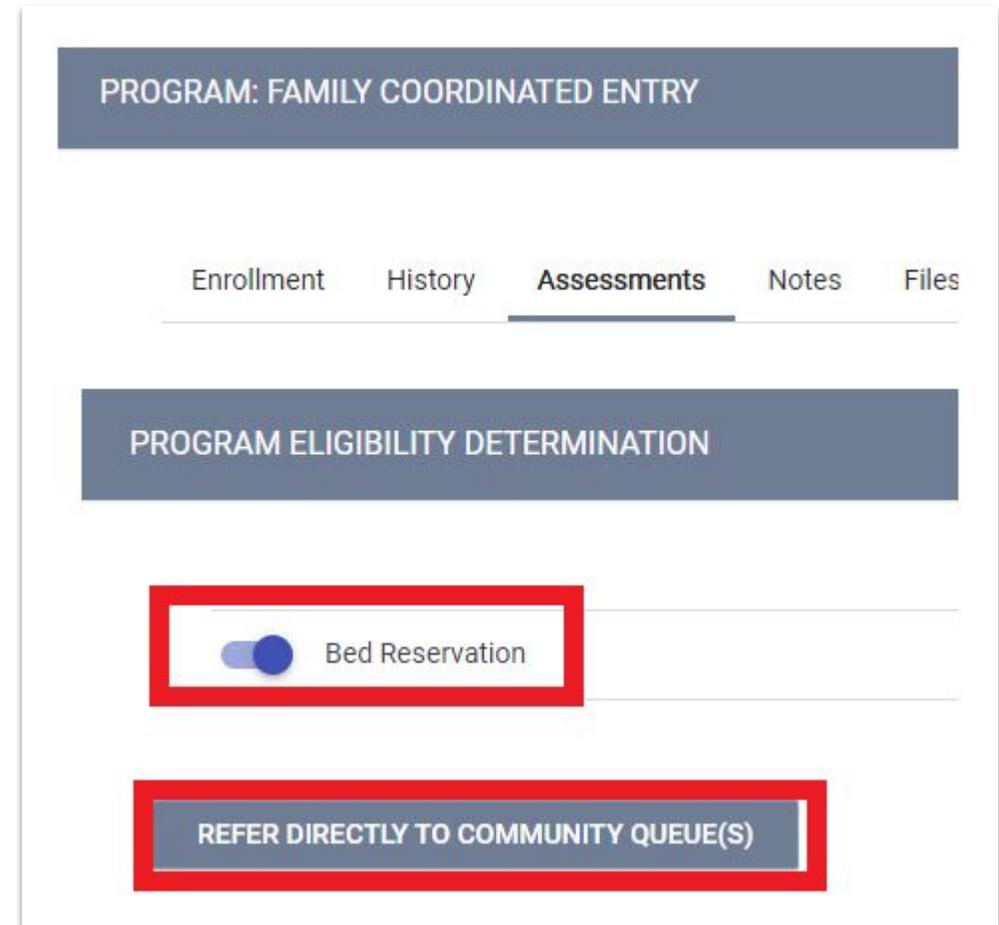
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Bed Reservation Process

Once all prerequisites have been met, the household can be added to the **Bed Reservation Community Queue**

1. Navigate to the HoH's **assessments subtab** within their CES enrollment
2. Under the "Program Eligibility Determination" section click forward on the **Bed Reservation toggle**, and then click on the **Refer Directly to Community Queue** button

NOTE: Users can refer to the [Adding Households to the Bed Reservation Community Queue](#) for more detailed information about this process



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Bed Reservation System DEMO

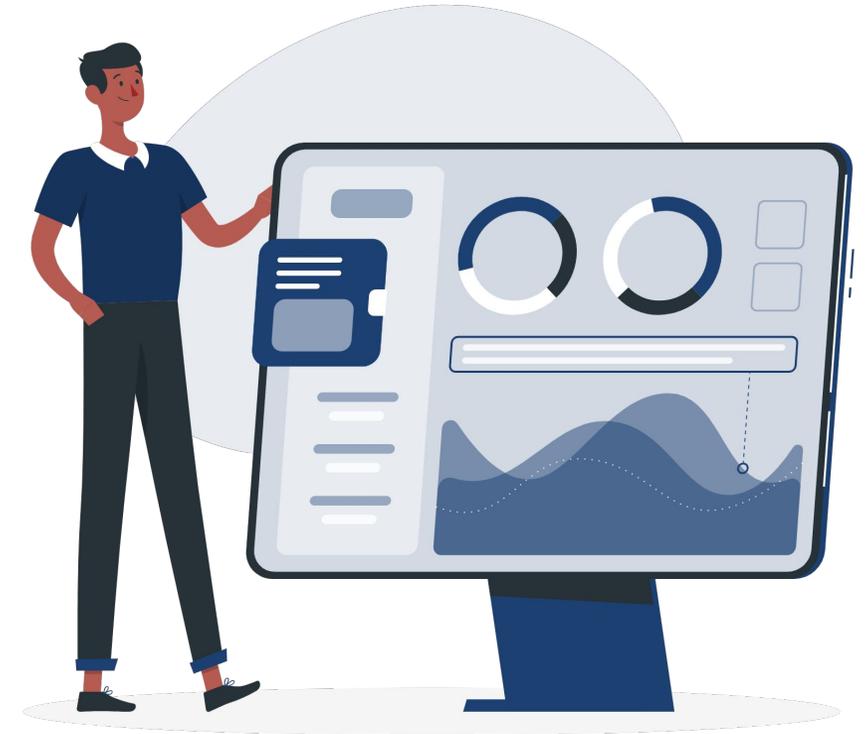


Maintaining Households on the Community Queue

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, it 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

Review the knowledge base article [Maintaining Households on the Community Queue](#) for more information.



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Maintaining Households on the Community Queue

DEMO

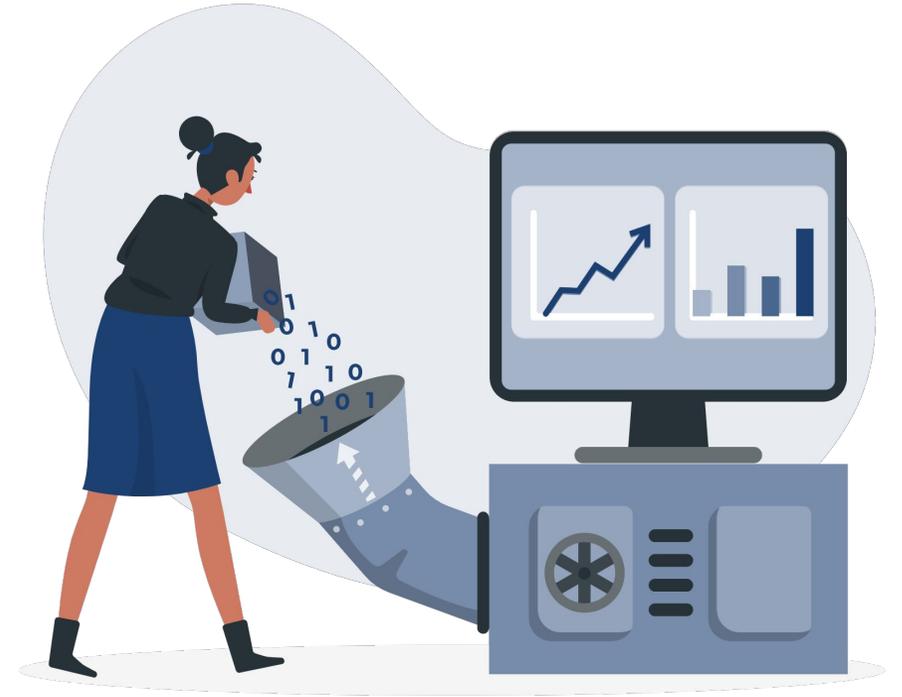


CES Clients Active with Service Provider & on CES CQ

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.](#)



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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

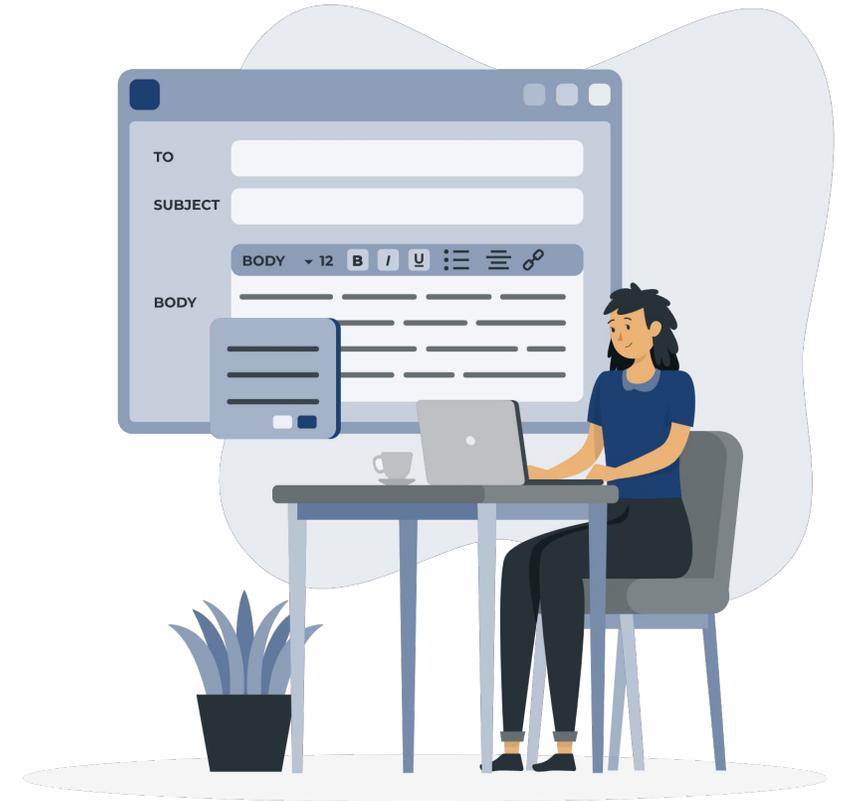
Training and Resources

May 2025 OC HMIS Trainings:

- **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](#) and Meeting Links Doc for the registration links.



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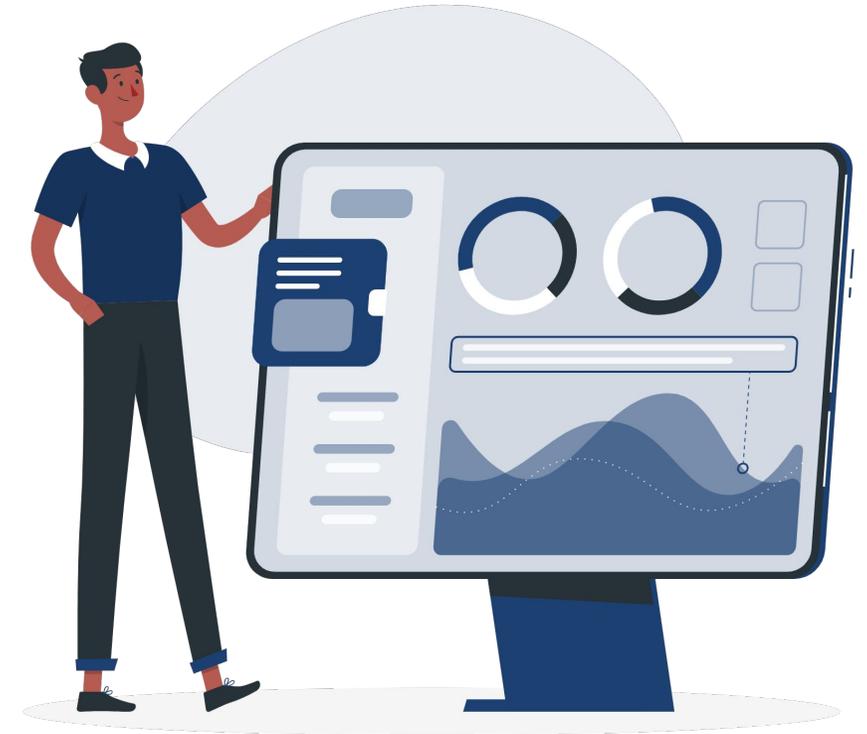
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Project Performance Report

The Project Performance Report (PPR) Draft Data for **Emergency Shelter** projects will be published on the OC HMIS website in the upcoming weeks.

Current and past PPRs can be found on the [Orange County HMIS](#) website: OCHMIS Website > Reports > [Project Performance Reports](#)

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



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Data and Performance Management Meeting

Agenda:

Quarterly Report Review and Discussion:

- Emergency Shelter PPR
- Street Outreach PPR
- Homeless Prevention PPR
- Q1 Data Quality Report (DQR)

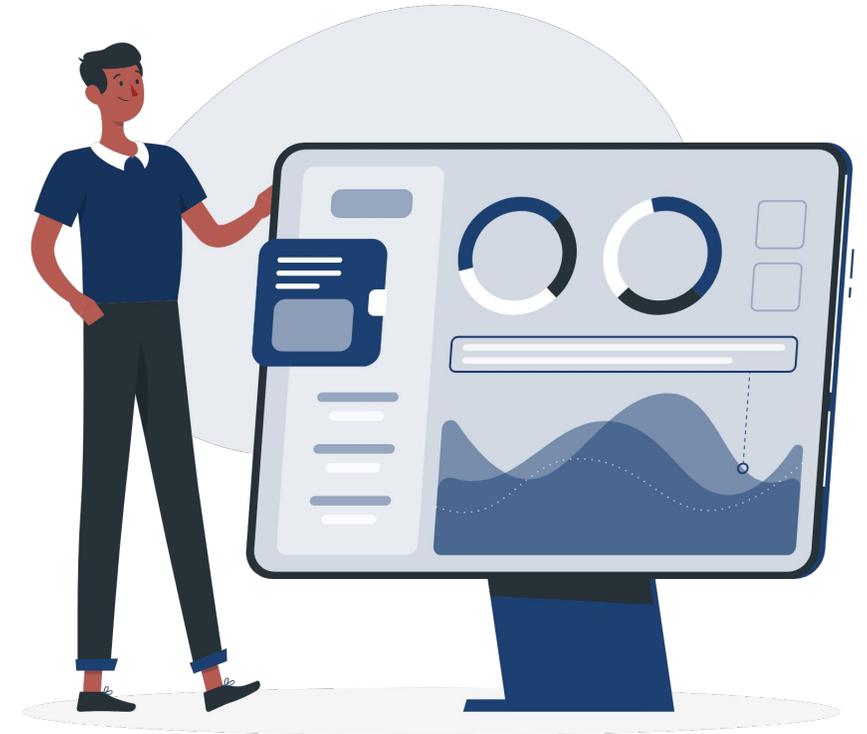
Wednesday, May 14th @ 10am - 11am

Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

Review the [OC HMIS Calendar](#) to find monthly HMIS meeting details including Meeting ID and Passcode.



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Proposed Data Standard Changes

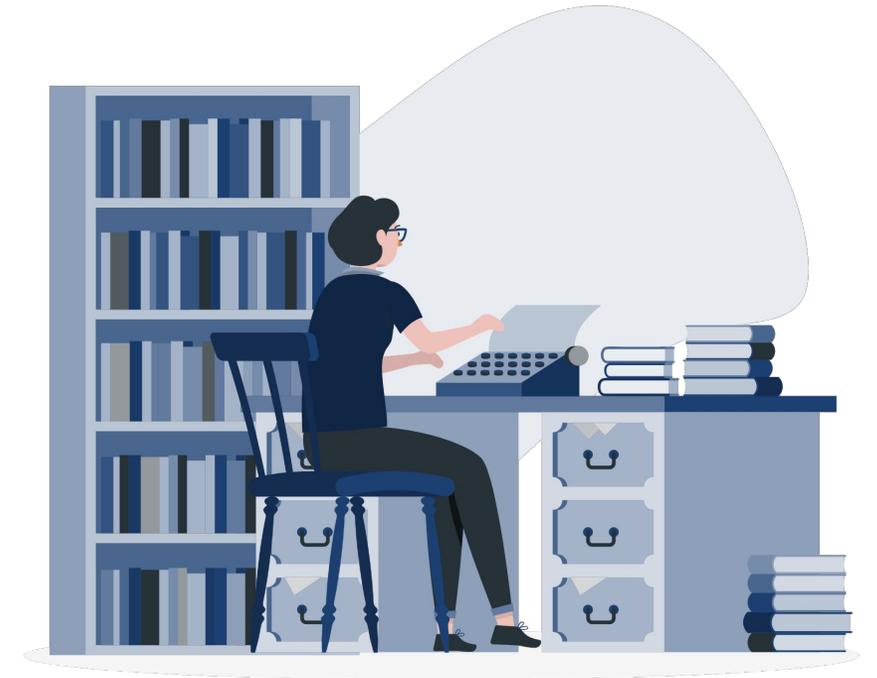
- During the HMIS Leads webinar on April 16, 2025, there was an announcement that Gender and Sexual Orientation data elements will be retired October 1st.
- Sex will be added as a new Program Specific Data Element.
- Vendors have been instructed not to map Gender data to the new Sex data element
 - Agencies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



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Proposed Data Standard Changes

- CoC Board will determine whether or not the CoC should continue to collect the Gender and Sexual Orientation data elements after 10/1, and we will share that decision with the users when it is made.
- These changes are proposed at this point, but haven't been finalized.
- Agencies should continue to collect the data elements available in HMIS, as these data elements reflect the published Data Standards.



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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.



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HMIS Meeting 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.

We have added a question about Looker Training so you can provide any topics you may be interested in for the training course.

Survey: <https://forms.gle/8TEhg9dSx6uaSxPTA>



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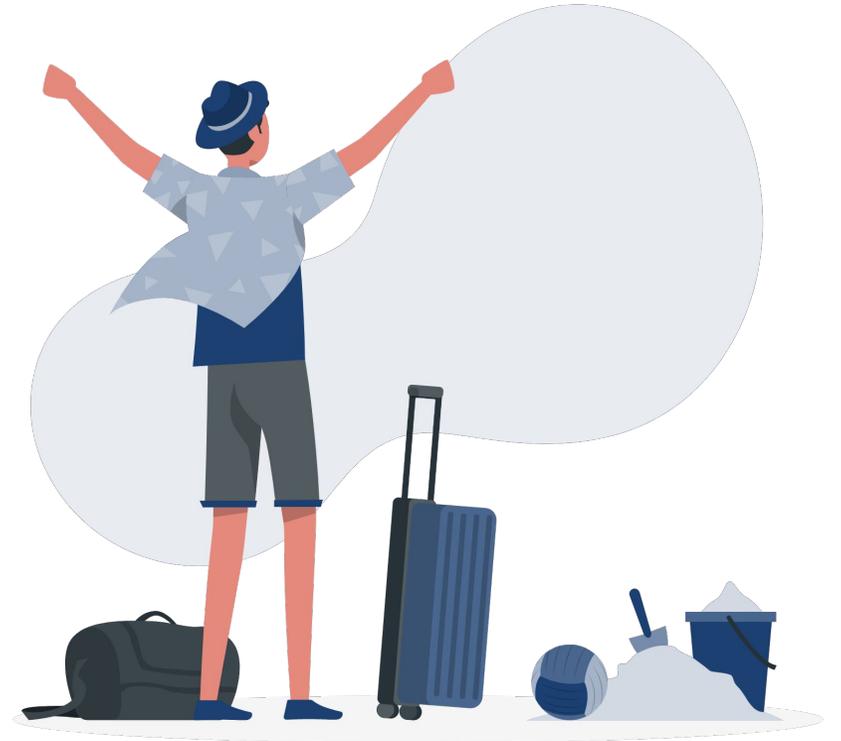
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Holidays Observed

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.



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Q&A

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

Thank you
Have a great day!

Next User Meeting: June 4th



**United
Way**



Orange County United Way