OC HMIS User Meeting Webinar Minutes
06/04/25

Contents

Agenda Items

HMIS Participating Agencies Schedule

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

- HDX 2.0 opened for HIC/Sheltered PIT submission May 13th
- 2025 HIC/Sheltered PIT due June 13th

HMIS Agency Audit

- Scheduling June - December

PPR Corrections

- Emergency Shelter Corrections will be added to your agency's DropBox

System Performance Measures

System Performance Reports (SPMs) are annual reports which help the CoC to evaluate and improve their performance as a whole.

Project types included for this report are: Safe Haven, Street Outreach, Emergency Shelter, Transitional Housing, and all Permanent Housing types.

Reporting Period: 10/1/2023 - 9/30/2024

The latest System Performance Measures were submitted to HUD in February and the results are available on the OCHMIS Website.

Year-Over-Year Comparison: 2019 – 2024

HMIS Policies and Procedures Update

The HMIS Policies and Procedures was approved by the CoC Board in August 2024, with the exception of the Client Record Request policy. The policy was approved by the CoC Board during the May 2025 meeting.

- The CoC Board requested additional research be done to determine if the Client Record Request policy should be updated to allow clients to request their full record in HMIS.
- Additional policies and forms are being updated to provide clarity, reflect new guidance, or reflect new internal processes.

Client Record Request

Clients requesting specific information in their HMIS record may work directly with an agency participating in HMIS.

- Case notes may be shared by the agency that entered them at the agency's discretion.
- Agencies can only provide information that they have access to view in HMIS.

Clients that want to receive their full HMIS record may submit a record request by contacting a Service Provider currently participating in HMIS.

- Clients will be able to select the types of data they would like to review.
- Case notes are not included in the full record request submitted to the HMIS Lead.

Clients may request edits to data they contributed to HMIS

- Clients that wish to edit data for a specific project must contact the agency directly to request the edit.

- If a project is closed or the agency administering the project is no longer participating in HMIS, no edits can be made.

Data contributed by a participating agency (enrollment history, services, case notes, etc.) cannot be edited at a Client's request.

Data Use & Disclosure

- Clarify that data may be used or disclosed without client consent for system administration, technical support, program compliance, analytical use, and other purposes as outlined in the Privacy Notice or required by law.

Data Release

- Clarify that client data will not be shared without consent except for uses and disclosures outlined in the Policies and Procedures or otherwise required by law.
- The HMIS Lead, CoC Collaborative Applicant, CES Lead, and CES Administrators may release aggregate data about the CoC without organization or CoC Board permission.

Data Integration

- Agencies must be approved for HMIS access before submitting any data integration requests.
- Update language around new API process.
- Agencies requesting to integrate their own HMIS data with a case management software will be reviewed and approved by the HMIS Lead.
- Requests to integrate Coordinated Entry System data will be reviewed and approved by the HMIS Lead and the CES Lead.
- Agencies requesting to integrate HMIS data from other agencies that they do not manage will be reviewed and approved by the CoC Board.

Client Consent

- Clarify that the client is consenting for their data to be shared with other service providers/organizations in HMIS.
- Signing the consent form also means that the client's data may be included in data requests approved by the CoC Board.

Grievance Form

- Refer clients to OCC for grievances related to the Coordinated Entry System.
- Provide examples of HMIS-related grievances.

Privacy Notice

- Clarifies that there are situations where client data may be disclosed without the client's consent.
- Clients that submit a Client Record Request will have their full record sent to the agency that submitted the request on their behalf.

Clarity Feature Updates: Check In Button and Signature Field Type

The following feature updates are available on the training site. Please review the client's profile screen to test out the new features.

- A Check-In button has been added to the client profile that allows users to quickly check in a client without accessing their referral.
- There is a new "Client Signature" core field and "Signature" field type available which allows users to collect signatures on customizable screens.

2025 Agency Audits

The 2025 HMIS agency audit cycle has officially begun!

The HMIS Helpdesk team will begin scheduling audits in **JUNE**. Please be on the lookout for an audit scheduling email that our team will be sending out throughout the summer and fall months.

The HMIS Helpdesk team will reach out to your agency 2 weeks before your scheduled time slot to provide you with a list of available audit dates. Agency administrators will have 2 weeks to complete the 2025 HMIS agency audit form before your scheduled audit.

Data Entry for Social Security Number

Social Security Numbers (SSNs) are collected during the intake process to support the unique identification of each client served. CoCs rely on accurate SSNs and client UIDs to produce an unduplicated count of clients served within HMIS.

SSN Data Collection Instructions:

- **Data Collected About** -- All Clients
- **Project Type Applicability** -- All HMIS Project Types
- **Collection Point** -- Record Creation

Since SSNs are a required data element for many mainstream programs, projects may require access to accurate SSNs to help their clients access key services.

PATH, CoC and ESG-funded projects are only required to collect the last four digits of a client's SSN, although they may collect all nine digits. Some projects may serve clients that don't have an SSN; in these cases staff members should select the "*Client doesn't know*" response.

Invalid Social Security Number Warning

Whenever staff members enter an SSN for a client during the record creation process, Clarity HMIS will check to see if the SSN is valid.

SSNs are considered <u>invalid</u> if any of the following are true:

- last four digits are "0000"
- first three digits are "000", "666", or start with a "9"
- middle digits (second grouping of digits) are "00"
- digits are repetitive, such as 111-11-1111 etc.
- digits are sequential, such as 123-45-6789 etc.

If the SSN is invalid, a pop-up warning will appear:

- Staff members can click "**Cancel**" to correct the SSN
- Staff members can click "**Ok**" to save the invalid SSN

Non-Numeric Social Security Number Digits

Staff members can enter non-numeric characters for any digits of a client's SSN that are unknown or refused by the client. Clarity HMIS will automatically convert these characters to an "X".

- If a non-numeric character is entered for all nine digits of an SSN, the "*Quality of SSN*" field will default to "*Client doesn't know*"
- If any digit of the SSN has a non-numeric character, and there are no more than 8 non-numeric characters, the "*Quality of SSN*" field will default to "*Approximate or partial SSN reported*"
- If the "*Consent Refused*" toggle is enabled, all SSN digits will convert to X's when the client record is saved

SSN Quality Codes

- Full SSN Reported - A complete and valid SSN is provided
- Approximate or Partial SSN Reported - Any SSN other than a complete and valid 9-digit SSN, regardless of reason, is reported
- Client doesn't know - Client does not know or does not have an SSN
- Client prefers not to answer - A client prefers not to provide any part of their SSN, regardless of the reason
- Data not collected - No attempt was made to collect an SSN from the client

For more information on Social Security Number data entry, please refer to the [Adding Client Profiles to HMIS](#)

Removing Household From Community Queue

The CES Community Queue (CQ) referral should remain active as long as there is contact with the household within the 90-day timeframe.

However, households may be removed from the CQ if/when:

- The household attains housing outside of CES.
- The household no longer desires to participate in the CES.
- The household cannot be contacted by any Access Point teams with concurring enrollments within the 90-day timeframe.

Another reason the household may be removed from the Community Queue is due to profile inactivity, meaning none of the four check-in activities outlined in the Maintaining Households on the Community Queue Knowledge Base Article have taken place within the past 90-days.

If the household is removed due to inactivity before their housing needs have been met, they can be referred back via a new CES Assessment.

Further information about removing households from the CES Housing Community Queue is available via the Removing Households from the Community Queue.

Exiting Clients from a Program

Clients may be exited from a project for the following reasons:

- Successful program completion
- Client/household stopped engaging in the program
- Client/household wishes to exit the program.

For CES projects, enrollments should remain open as long as there is communication with the household within the 90-day timeframe.

If a client is erroneously exited, the program enrollment can be restored by navigating to the exit screen and clicking 'Reopen Client Program,' at the bottom right of the screen.

Learn more by reviewing the Reopen Program Enrollment Knowledge Base Article.

When completing a program exit, be mindful that…

- For group enrollments, the option to exit several household members will appear. Toggle the switch next to the member(s) you wish to exit (users will complete exit screens for each).
- When exiting the Head of Household from a group enrollment, a new HoH will need to be assigned before exiting the current head of household.

Review the Project Exit Date Knowledge Base Article for guidance on when and how to exit clients from a project.

Reopen a Program Enrollment

There may be times when staff will need to know how to reopen a program enrollment.

For example, if staff accidentally exit a client from a program, an incorrect date was added or if exit data needs to be edited, knowing how to reopen a program enrollment will be helpful.

Step 1: Navigate to the enrollment you are wanting to reopen. Click the **Exit** button to access the exit data.

Step 2: Scroll down to the very end and click on the "**Reopen Client Program**" button.

In cases where the exit date was entered incorrectly or an exit was accidentally added, please follow the next steps.

Step 3: A pop-up will appear with the following statement. "This action will clear the exit date". Click **save**.

The exit data will remain, but the enrollment will be reopened. You may confirm the End Date is now listed as "active".

The next steps depend on whether the Clear and Restore All Exit Data functionality is enabled. This functionality is limited to users who have been approved to have this additional access. *All Agency Admins have this additional access.

Users with access to Clear and Restore Exit Data can follow the steps below:

Step 3: A pop-up will appear with the following statement. "This action will clear the exit date. To clear all exit data, please select toggle before saving. "Toggle "**Clear All Exit Data**" to completely remove an accidental exit.

Step 4: The following message will appear "By confirming, all exit data for this client will be removed. This action will not modify any clients service end dates. Click **OK**.

The page will refresh on the "End Program" screen and the project exit date and the exit data will be cleared. You may confirm the end date is now listed as "active".

Important Notes:

- Service End Dates are separate from this process
- This process will need to be completed per household member
- Clearing the exit date and hitting save will not remove the end date.

Potential Exits Report

The Potential Exits Report can be helpful to identify clients who may need to be exited. This report flags clients that are active in a program but haven't received services, CE events, and casenotes within the date range.

From the **Launchpad**, click on reports, navigate to the Report Library>Program Based Reports>Potential Exits by. Click **Run**.

Enter in your reporting parameters:

1. Select the program(s) you wish to include in your report
2. Enter in your cut off date
3. Select your preferred Report Output Format
4. Click **Submit**

Scroll up, refresh your webpage and click on the **Report Queue icon**. Once the Potential Exits Report loads, you'll be able to see the client UID, the client name, the last four of the client's social security number, the project name, details about their most recent activity, the assigned staff, and if the enrollment type is for a family or individual.

For more information about a client's most recent activity, click on the client UID to be taken to the client's profile.

Training and Resources

June 2025 OC HMIS Trainings:

- **HMIS Part 2 Training**
  Wednesday, June 25th, 2pm -3:30pm

Navigate to the OC HMIS Calendar and Meeting Links Doc for the registration links.

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.

Here's the link to the Survey: https://forms.gle/8bd8uoKchzP86rPT6

Q&A

Agency Audits

- Q: Is there a way to confirm if the Agency Audit email email has been sent when an agency isn't sure they've received one?

- ○ A: Agency Administrators may monitor their [HappyFox ticketing account](#) to see if the HMIS Help Desk team has sent them an Audit scheduling request.
- ○ A: If needed, review the [Creating a Help Desk Account](#) Knowledge Base Article to learn more about setting up a Happy Fox Account.
- ○ A: Audit tickets will typically have the AUDIT: USER RESPONSE REQUESTED label and use the title, "*HMIS Agency Audit - Agency Name.*"
- ○ A: Please contact the HMIS Help Desk if the Agency Administrator contacts have changed for your agency.

HMIS Policies and Procedures Update

- ● Q: What is the process for client's requesting their records?
  - ○ A: Clients will first need to contact their Access Point agency to request their record. Then the agency must verify the client's identity to ensure the appropriate record is shared with the client. Finally, the Agency Administrator will need to submit a record request ticket to the HMIS Help Desk. Please review the [Client Record Requests](#) Knowledge Base Article for more information.

Removing Households from the Community Queue

- ● Q: Does exiting a household from the community queue restart their number/place on the queue if they are referred back again?
  - ○ A: Once the participant is referred back from a new CES Assessment, their priority status will depend on their length of homelessness recorded at CES program entry via the "*Approximate Date This Episode of Homelessness Started,*" field along with other prioritization factors including disability status and shelter status.
  - ○ A: [CES Prioritization Policies and Procedures](#) specify that participants experiencing Chronic Homelessness are the first priority group to be reviewed for any housing opportunity (sorted by approximate length of homelessness from entry); all lengths of homelessness and disability status must have supporting documentation to support what is self reported.

Exiting Clients from a Program

- ● Q: If a client exits a shelter and does not leave contact information or connect with an outreach team, is it okay to close them out of their CES program? Shelter staff generally do not outreach to clients after they have exited the shelter program.
  - ○ A: It is recommended that providers review HMIS to see if the client is actively working with another provider that could take over the CES support.
  - ○ A: If there are no teams available to take over, contact the CES Lead/Admin Team to determine if the client is appropriate for CES program exit; the CES Lead/Admin Team will instruct the agency on next steps.
  - ○ A: Agency Administrators may reach out to the HMIS Help Desk with specific examples for guidance, if needed.

MHSA

- Q: Are Housing Interest Survey responses for MHSA eligibility tied to the CES program enrollment or the client record for the purposes of CES prioritization on the Community Queue? Specifically, does the Healthcare Agency need to complete a new Housing Interest Survey for MHSA certified clients for each new CES enrollment.
    - A: Please submit a ticket to the HMIS Help Desk with any examples so that the Help Desk Team can loop in the CES Leads for further discussion.

CES Partner Documents and Resources

- Q: Are there versions of the Self-Certification of Homelessness Form available in Spanish?
    - A: There are versions of the form available in Spanish, Vietnamese, and Korean in addition to English from the OC CEO's page for CES Partner Documents and Resources page.

Future Meeting Information

July 2025 HMIS User Meeting Webinar

- Date: Wednesday, July 2nd, 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 "HMIS – Users and Trainings" category with your ideas.