

# August 2025 OC HMIS User Meeting

211

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Orange County  
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# Agenda

1. HMIS Participating Agencies Schedule
2. Privacy and Personal Identifying Information Guidance
3. Participation in Data Entry and Impact
4. Gender Data Element
5. HMIS Account Update & Testing Form Knowledge Base Article
6. HMIS Privacy and Part 2 Recertification Reminder
7. Anonymization vs Privatization Client Profile
8. New form for Client Record Request
9. Notes and Public Alerts
10. Duplicate Clients Report
11. Longitudinal System Analysis (LSA)
12. Project Performance Report
13. Data & Performance Management Meeting
14. Training and Resources
15. Survey
16. Holiday
17. Q&A
18. 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.

# 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												
	Agency Audits	June	Specific to each agency	n/a	n/a												
Orange County Requirement	HMIS User Recertifications	July	August	n/a	n/a												
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00AM	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a												

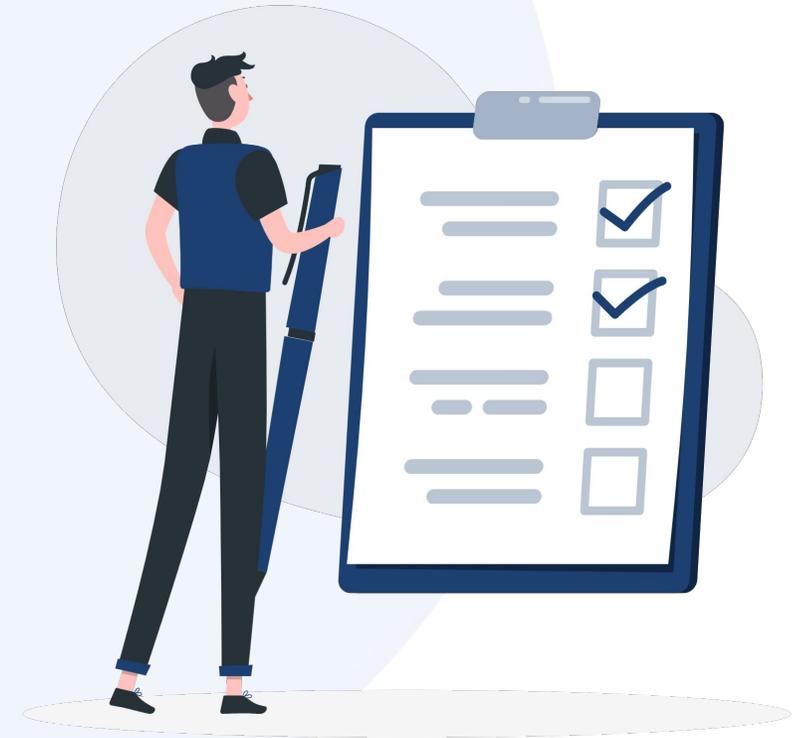


## HMIS Participating Agencies Schedule



# HMIS Participating Agencies Schedule

- HMIS Agency Audit
  - Scheduling July - December
- HMIS Part 2 Recertification
  - Ongoing with a due date of August 31st
- PPR Corrections
  - Homelessness Prevention PPR Corrections will be added to your agency's DropBox this week
    - If you don't have a Goal 10 spreadsheet in DropBox, your agency didn't have any exit data during the reporting period of 07/01/2023 - 06/30/2025



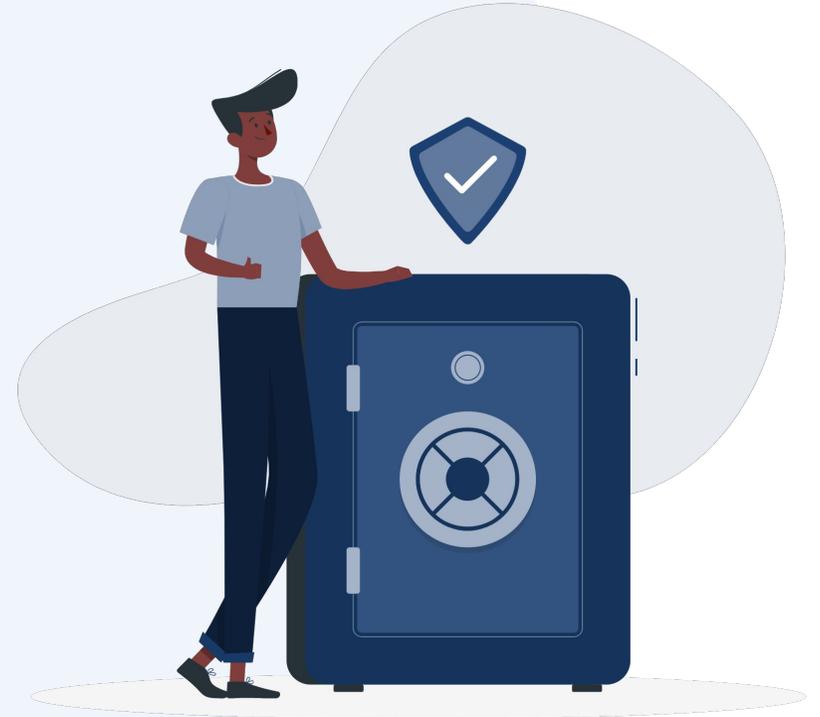
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# Privacy and Personal Identifying Information Guidance

A reminder about Client Privacy and Personal Identifying Information

Best practices for sharing client information:

- Users should only use the client's unique identifier to identify clients in correspondence. This includes HMIS tickets, reports, work emails, and work related instant messaging apps.
- If users must share additional client information such as name, date of birth, or Social Security Number in a report or correspondence, please use an encrypted email or password protected file on your work network. If you are sending a report to HMIS, please use your agency's DropBox.

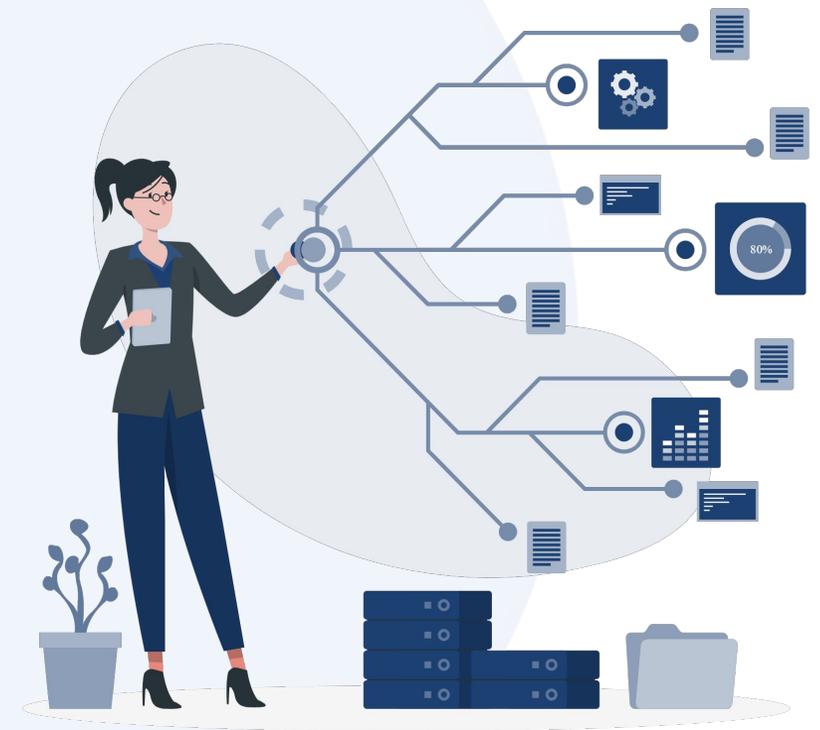


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# HMIS Data Entry & Performance Impact

Data entered into HMIS is used to understand the characteristics of people served through the OC System of Care, and how effectively clients are being served through this system of care.

- Federal and State level: Data is aggregated for Orange County and submitted to inform how effectively our CoC is addressing homelessness as a system of care. Results of these reports impacts the amount of funding our CoC will receive from these entities.
- Local level: In addition to reviewing data at the county-level, data is also aggregated at the project-level to inform how effective specific projects are at serving their clients. Local funders use this data to determine which agencies and projects they want to fund.



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# HMIS Data Entry & Performance Impact

This means that accurate and complete data entry into HMIS is critical to ensure that your agency, and our CoC as a whole, continues to receive the funding needed to address homelessness in our community.

## Data Entry & Data Quality Best Practices:

- Search for client records in HMIS prior to entering new clients to avoid duplicate profiles for the same client
- Confirm name spelling and review client documentation (if possible) to reduce data entry errors for Name, Date of Birth, and Social Security Number
- Enter data into HMIS directly instead of collecting data on a paper form
- Run data quality and performance reports at least quarterly to correct errors and identify areas for additional training
- Review data quality and performance correction files sent from the HMIS team, and update HMIS as needed
- Review knowledge base articles and training materials to understand how to collect specific data elements



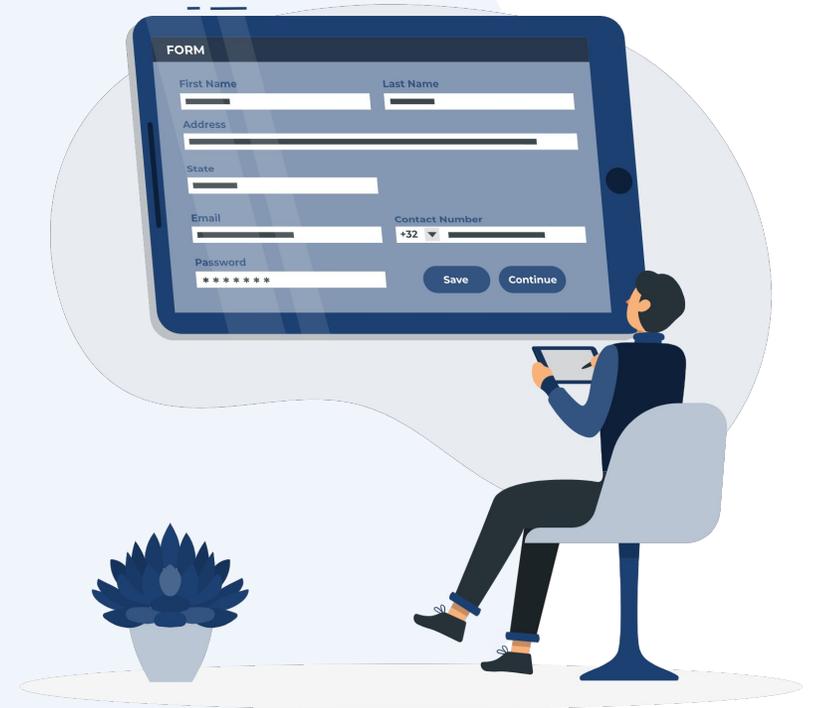
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# Gender Data Element

HUD has recently released updated [Data Standards](#) which no longer require the collection of the Gender data element. Instead, a new Sex data element will be collected which captures whether a client is Male or Female.

Our OC HMIS Team anticipates that this data collection will begin October 1st. Prior to making any revisions to OC HMIS, the CoC would like to gather feedback from the HMIS Participating Agencies regarding the Gender data element.

HMIS Agency Admins are advised to discuss with their team and complete the [Agency Feedback - Gender Data Element survey](#) to share how your agency is currently utilizing this data element, and whether removing this data element will have an impact on your agency. Responses are due by **August 15th**.



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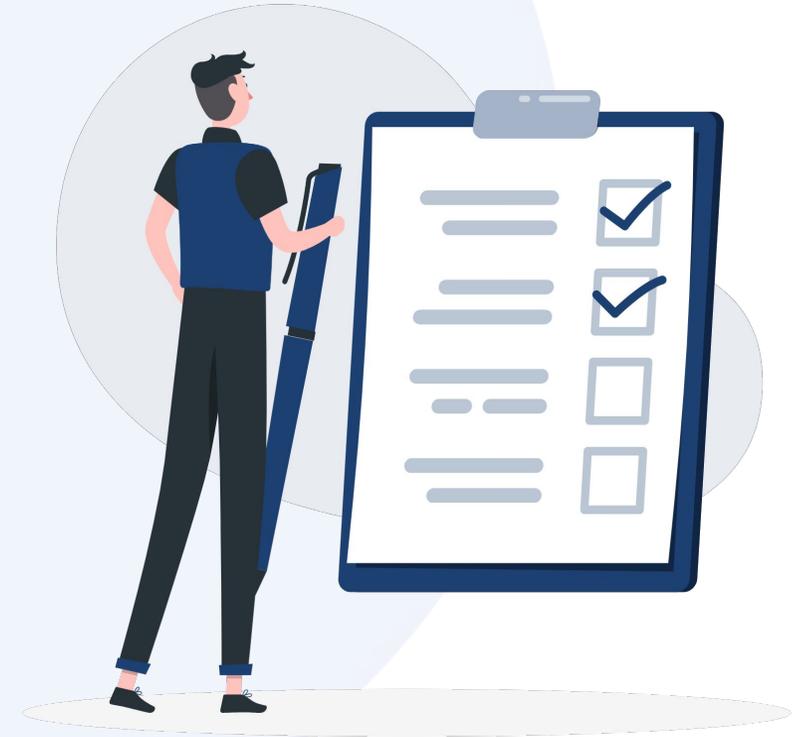
# HMIS Account Update & Testing Form Knowledge Base Article

The [HMIS Account Update & Testing Form Knowledge Base](#) (KB) article walks Agency Administrators (AAs) through each section of the form:

- What information is needed
- Common errors to avoid during data entry
- Which roles or access levels to request

This KB article is designed to support Agency Administrators to select the appropriate role for their staff's job responsibilities and in turn reducing account set up delays.

The KB can be accessed directly in the HMIS Knowledge Base Library under the Agency Administrator category and the form is listed on the OC HMIS site: HMIS Forms and Documents > HMIS Data & Set Up Forms > [HMIS Account Update & Testing Form](#)



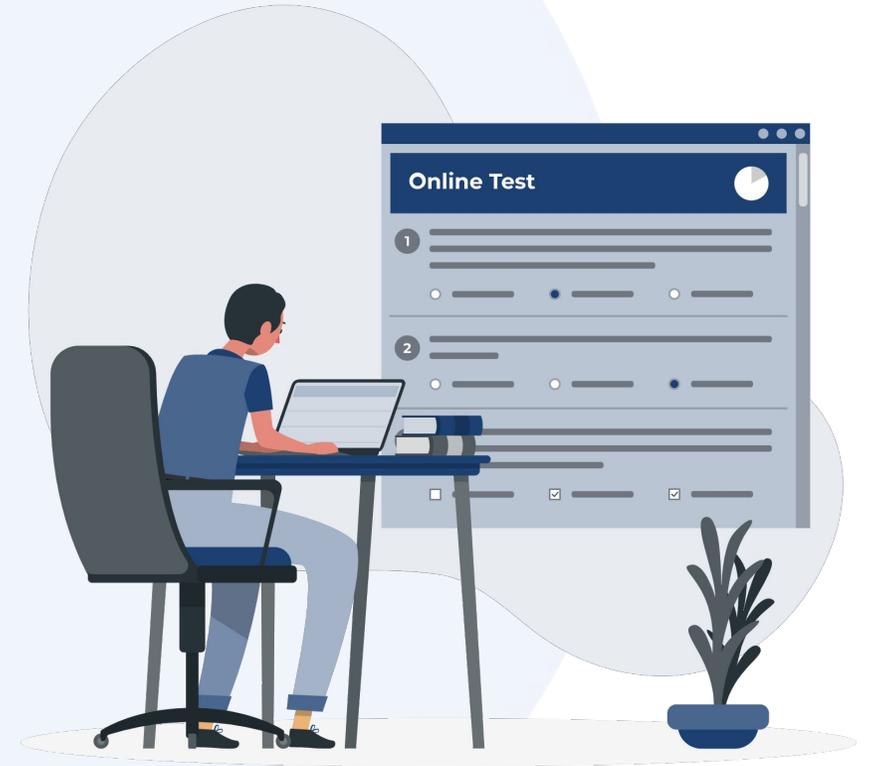
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# HMIS Privacy and Part 2 Recertification Reminder

The [2025 HMIS Part 2 Recertification](#) is available.

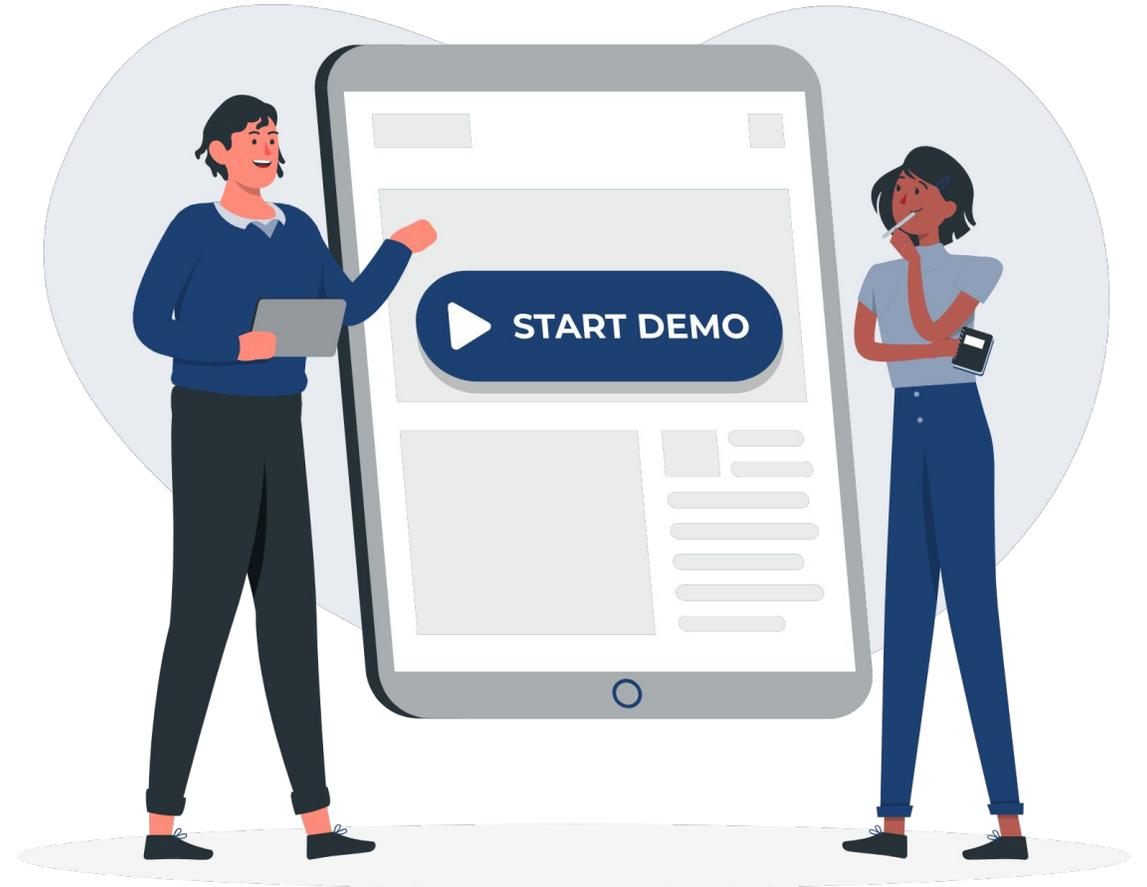
- Agency Admins must submit the 2025 HMIS Part 2 Recertification Form for their users by **August 31st** to avoid having their accounts locked until the Recertification is completed.
- **All HMIS Users**, including Read Only Access, will be required to complete the [HMIS Privacy and Security online course](#).
- Users with data entry access will also be required to take the [2025 HMIS Part 2 Recertification](#)
  - Users with Read Only accounts are excluded.

Agency Admins can run the **Agency Active Users** report to review active users at their agency as needed: Data Analysis > User Management > Agency Active Users.



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# Agency Active Users Report Demo



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# Anonymized vs Private Client Profile

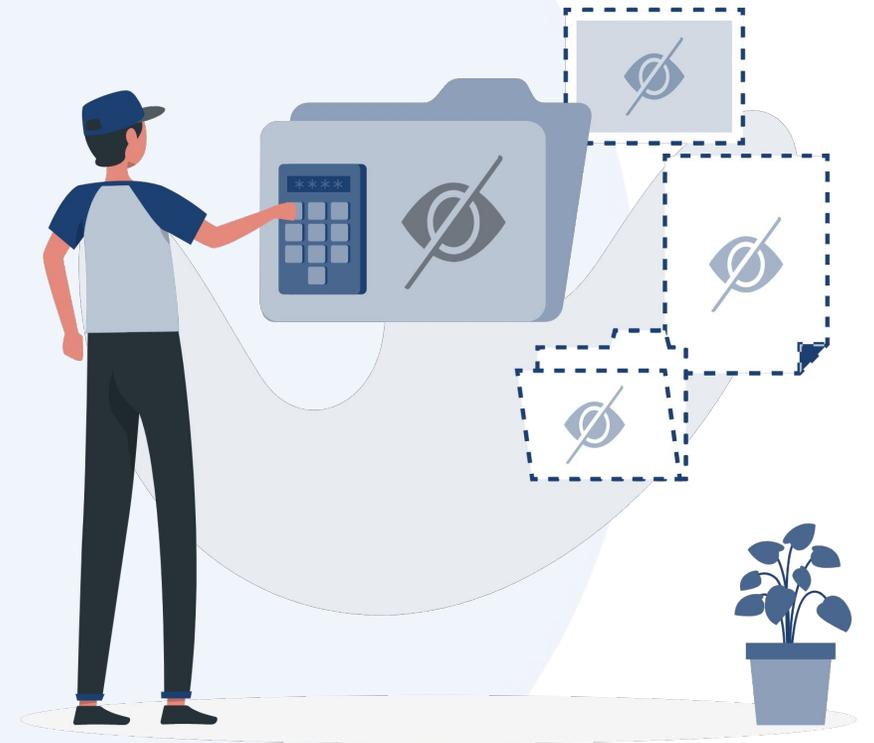
Since OC HMIS functions as a data sharing platform, clients should be informed of their right to refuse or revoke their consent to share their information at any time. **Clients who opt out of consenting to share their data can still have their data entered into a private or anonymized HMIS client record.**

**NEW** clients **without** an HMIS record who do not consent to share their information should have a **private client record** created for them.

During client record creation:

- Set the ROI permission status to 'No'

A new private client record will be created for the client that is visible only to users at the agency that created the record. Users can then enter Name, DOB and SSN into the private client profile as usual.



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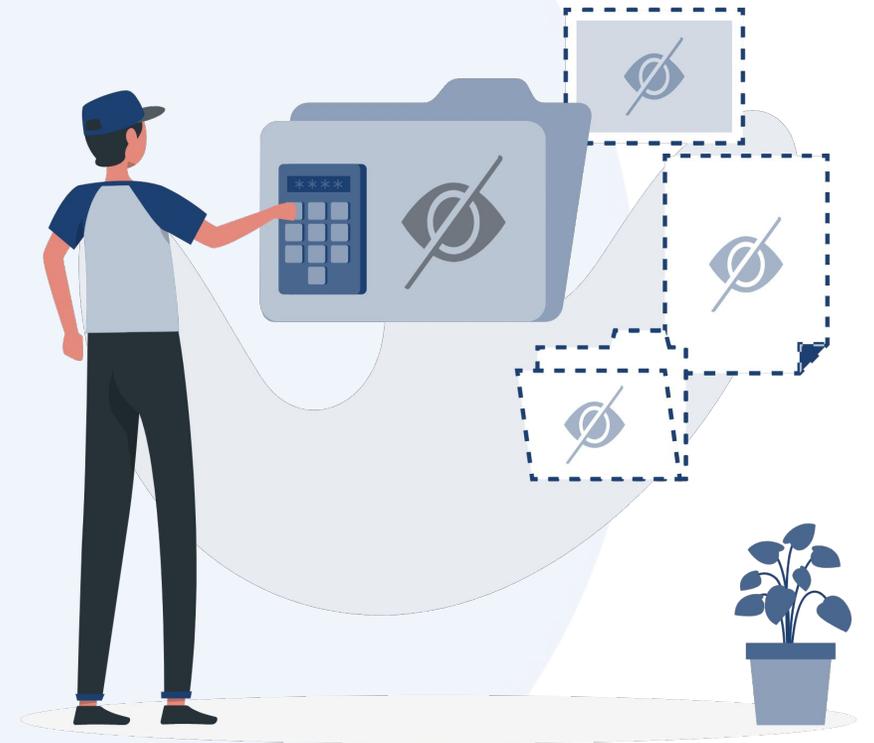
## Anonymized vs Private Client Profile (2)

**EXISTING** clients with an HMIS record who revoke their consent to share their information should have their **client record anonymized if more than 1 agency has complete data entry/provide services to the client.**

To anonymize a client record users should upload a signed [Client Revocation of Consent Form](#) into the client's files tab. An Agency Admin should then submit a ticket to the OC HMIS Helpdesk with the client UID requesting to anonymize the client record.

An anonymized client record will only be visible to users at agencies that have served the client in the past. Any other agency that serves the client moving forward will need to create a separate private client record to record data.

KBs: [Accessing and Completing Release of Information \(ROI\) Page Refusing/Revoking Consent to Share Personal Information](#)



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# New Client Record Request Form

In May, the CoC Board approved updates to the [OC HMIS Policies and Procedures](#) to implement a new *Client Record Request* process. The updated *Full Client Record Request* process is now available on both the [OC HMIS website](#), and in our [Client Record Requests](#) KB article.

These updated resources include our [Client Record Request Documentation](#) document that provides users and clients with a list of records and definitions for all reports that can be provided in the *Full Client Record Request*.

A new [Client Record Request Form](#) is available that Agency Admins can utilize to indicate what records a client is requesting to receive as part of their HMIS record.

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Orange County

### Client Record Request Form

This form must be submitted by an Agency Administrator at an agency currently participating in OC HMIS, and should only be used when a client wants to access data in their HMIS record the agency submitting the form doesn't have access to.

Prior to submitting this form, talk with the client to determine the specific data they want to receive. Review the [Client Record Requests](#) knowledge base article to determine whether the request can be fulfilled without submitting this form.

Clients do not need to provide a reason for wanting their HMIS record.

Agency Name \*

Agency Administrator Name \*

Agency Administrator Email Address \*

Agency Administrator Phone Number \*

Client's HMIS Unique ID \*

What data would the client like to see from their HMIS record? \*

- Client Record Request Dashboard - Demographics, Release of Information, Enrollment History, Contact Information, and Uploaded Documents
- Client responses to assessments completed at entry, exit, or at anytime during their enrollment
- Data collected by a Service Provider regarding the client, including Services, Public Alerts, and Locations
- Coordinated Entry data, including status, history, and events

Only data entered in the HMIS record for the client ID above will be provided.

# New Client Record Request Form - Case Notes

As a result of the new *Full Client Record Request*, clients can now request to view case notes entered in their HMIS record. Agencies may provide case notes at their discretion, and are recommended to develop an internal policy on sharing case notes. Users can generate this information by using the *Client Record Request: Case Notes* report.

The Client Record Request: Case Notes report can be located by navigating to: Reports > Data Analysis > Orange County Clarity System Reports > Client Record Request > Client Record Request: Case Notes

Enter the **client's HMIS ID** and **your Agency Name** into the dashboard's filter to pull the report.

Client Record Request: Case Notes

Unique Identifier Agency

is any value is any value

Case Notes not Associated with a Program

Client Full Name	Agency Name	Case Note Date	Case Note Title	Case Note
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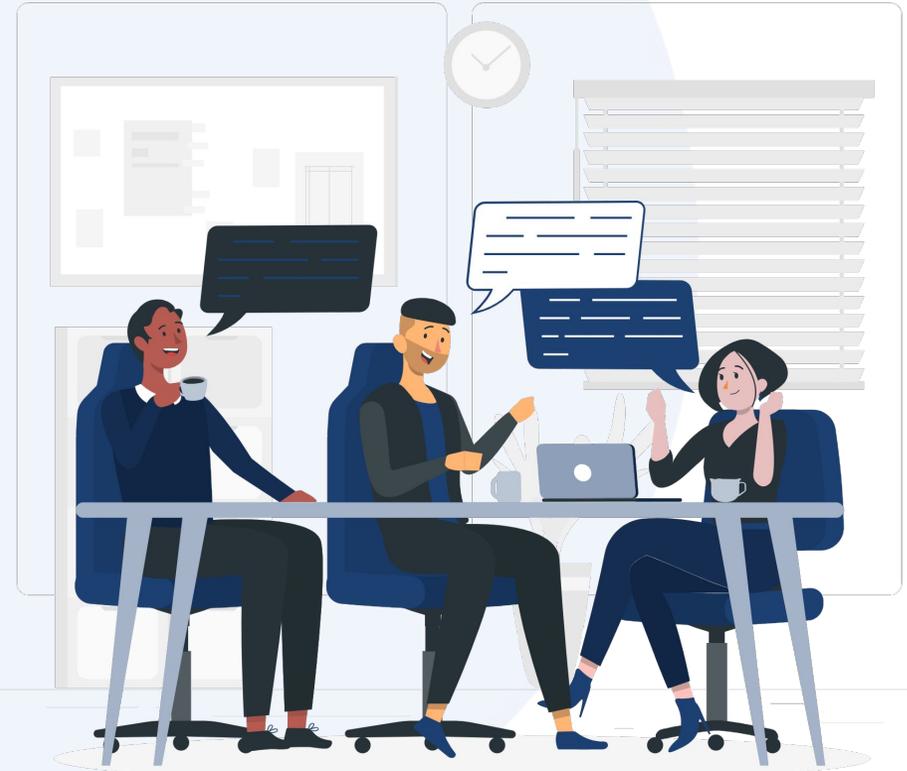
Program Case Notes

Client Full Name	Agency Name	Project Name	Case Note Date	Case Note Title	Case Note
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# New Client Record Request Form - Sharing/Review Guidance

At the time a client requests their HMIS record, users and clients must agree on a method share the information that does not violate the privacy of the client's data. *Client Record Requests* may either be shared as paper documents received in-person, or as encrypted documents shared over secure email.

Clients may request for users to review the files provided as part of their HMIS record with them. Upon request, users should schedule a time to meet with the client and should be prepared to explain each section of all *Client Record Request* files provided. Depending on the specific request, a full HMIS record may contain: Client Record Request Dashboard, Client Assessments, Services/Alerts/Locations and Coordinated Entry Data.



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# Notes and Public Alerts - Case Notes

Users are responsible for assessing the needs of a client, and coordinating the delivery of essential goods and services. Users should record this type of information into HMIS as either project-level case notes or housing notes.

**Case notes** are entered into the notes subtab of a client's project enrollment, and should be used to track information related to the enrollment. Case notes are only visible to users at the agency that created the note.

Users should enter case notes on the same day a session occurred. Case notes should be paraphrased and include only relevant facts, without jargon or other charged personal assumptions.

EXAMPLE: "Spoke with John Doe about his unemployment benefits, discussed opportunities to find employment"



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# Notes and Public Alerts - Housing Notes

**Housing notes** are entered into the services subtab of a client's project enrollment, and are used to coordinate housing eligibility and access, as well as client care. Housing notes are visible to all users within OC HMIS.

Users should enter housing notes following PIRP format: Purpose, Intervention, Response and Plan. Housing notes should include the purpose of the session, interventions the case manager applied, client's response to the interventions and the next steps needed to achieve housing goals.

For more information about this topic, users can reference our [Recording Case Notes and Housing Notes in HMIS](#) KB article.



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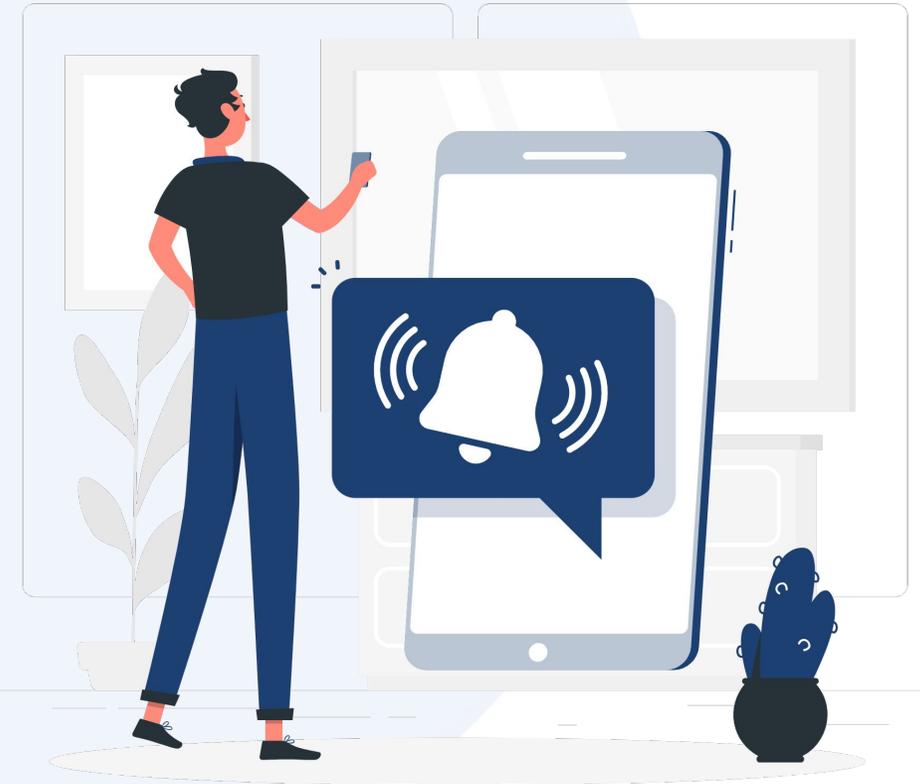
# Notes and Public Alerts - Creating Alerts

Public alerts are a type of note that is used during specific situations where it becomes necessary to inform your agency or several agencies of an urgent client situation or need.

To create a public alert users should:

1. Navigate to the client's notes tab
2. Click on the 'Add Alert' button
3. Fill out the following public alert information:
  - a. **Title:** Enter the public alert title
  - b. **Agency:** The agency field will auto-populate
  - c. **Expiration Date:** Enter the date the message will expire
  - d. **Note:** Explain the nature of the situation
  - e. **Private (optional):** Select whether to make the note visible to only users at your agency
4. Click on the 'Save Changes' button to record the alert

Once completed, a public alert banner will be displayed on the client's profile page until its expiration date



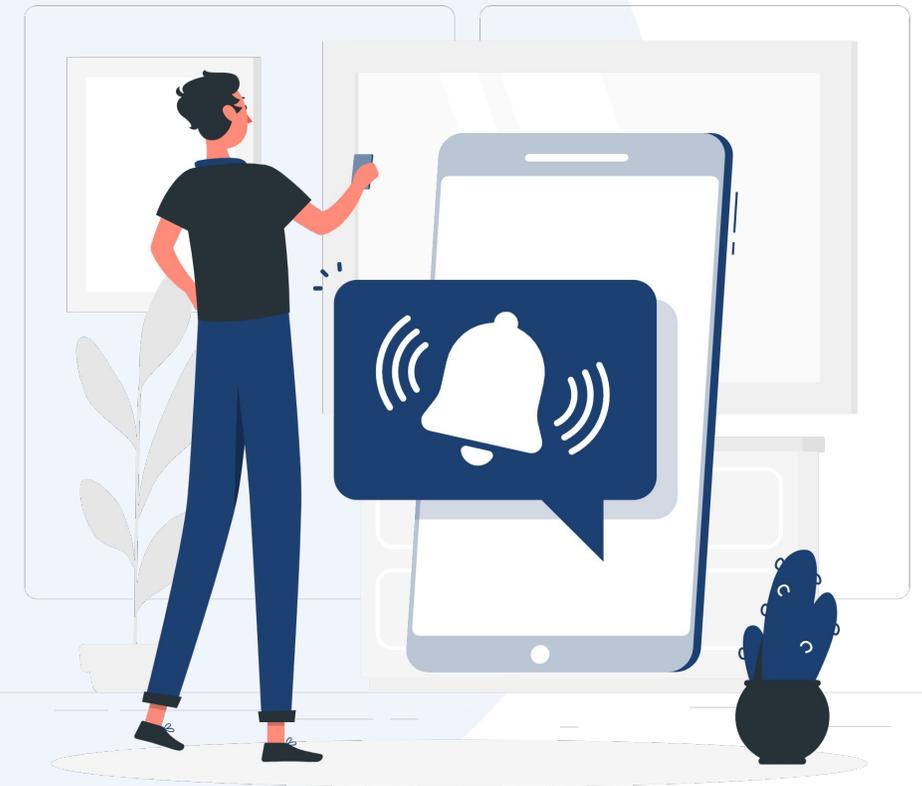
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# Notes and Public Alerts - Alerts Examples

Our vendor, Bitfocus, has provided the following examples of situations in which public alerts would be helpful:

- Locating clients to offer services/referrals
  - EX: “Have John Doe call our agency for rental assistance”
- Indicating housing opportunities are available for a client
  - EX: “Inform Jane Doe that she has been matched to a Permanent Supportive Housing opportunity”
- Information regarding language access support
  - EX: “Client John Doe speaks Spanish as primary language”
- Client has lost an important item/document, or item/document has been found
  - EX: “Staff found Jane Doe’s lost ID at our shelter”

For more information about this topic, users can reference our [Creating Client Notes and Public Alerts](#) KB article.



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# Monthly Report Highlight - Duplicate Clients Report

Users are advised to [search HMIS](#) to verify if there's already an existing profile for the client before creating a *new* HMIS record.

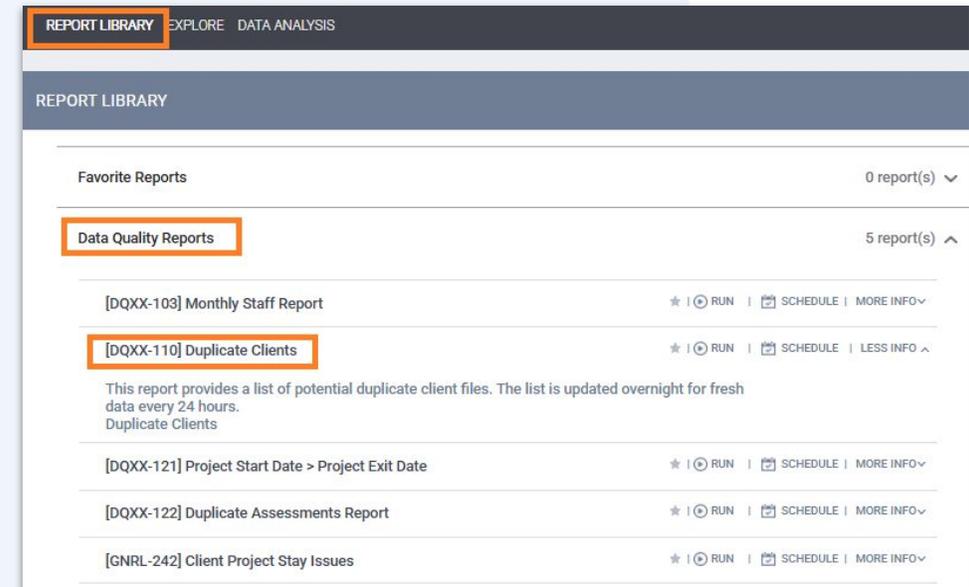
A process to help reduce duplicate HMIS records is to run the Duplicate Clients Reports to [request profile merges](#) of confirmed duplicate records.

This report provides a list of potential duplicate client files. The list is updated overnight for fresh data every 24 hours.

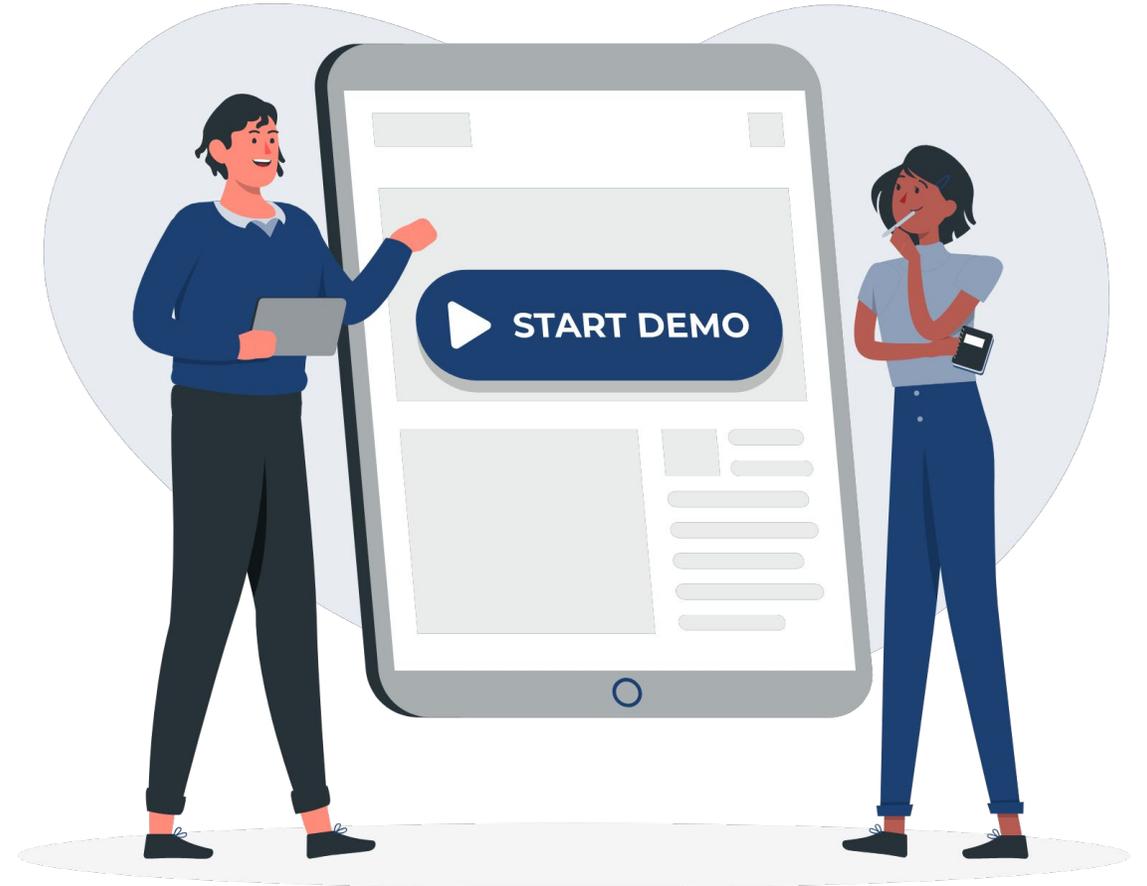
This report identifies client records with identical Personal IDs.

The system first looks at the following fields to determine if the records are an exact match:

- Personal Identifying Information (PII) fields such as Name, Social Security Number, Date of Birth
- Data Quality (DQ) fields such as: Quality of Name, Quality of SSN, Quality of DOB



# Duplicate Clients Report Demo



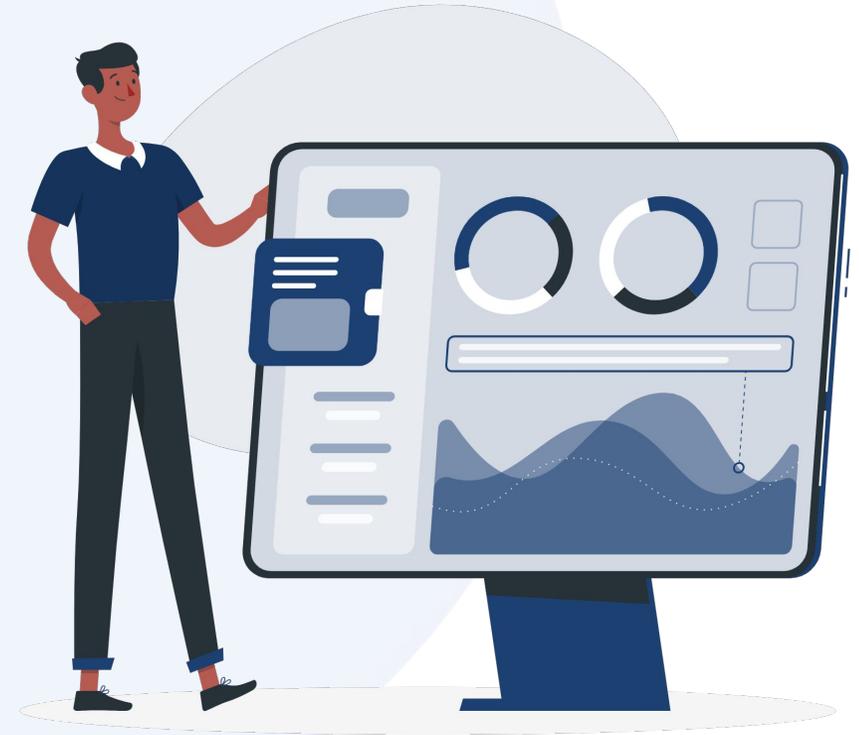
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# Longitudinal System Analysis (LSA)

The Longitudinal System Analysis (LSA) report is pulled from HMIS and is required to be submitted annually to HUD.

Data from each CoC's LSA is compiled to create the Annual Homeless Assessment Report (AHAR), which is submitted to the United States Congress.

The AHAR informs strategic planning for federal, state, and local initiatives designed to prevent and end homelessness.



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# LSA Report Specifications

Data is pulled annually from 10/1 - 9/30

Current Reporting period: 10/1/23 - 9/30/24

## HMIS Project Types

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



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# LSA Overview

Characteristics of the population experiencing homelessness

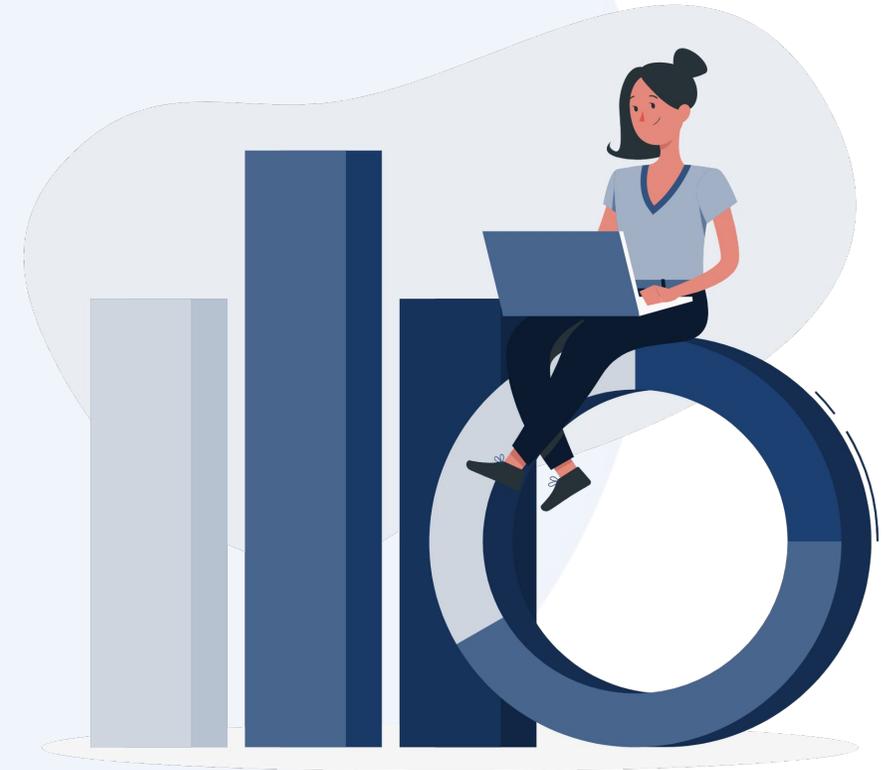
Informs how people experiencing homelessness use their system of care

- Analyze pathways through homelessness, including:
  - how long people are homeless,
  - how often they are exiting to permanent housing, and
  - whether or not they return to the system after being housed

Published report includes data for the system of care as a whole ([ochmis.org](https://ochmis.org) > Reports > [LSA](#))

Presentation will review how certain populations are flowing through the system of care

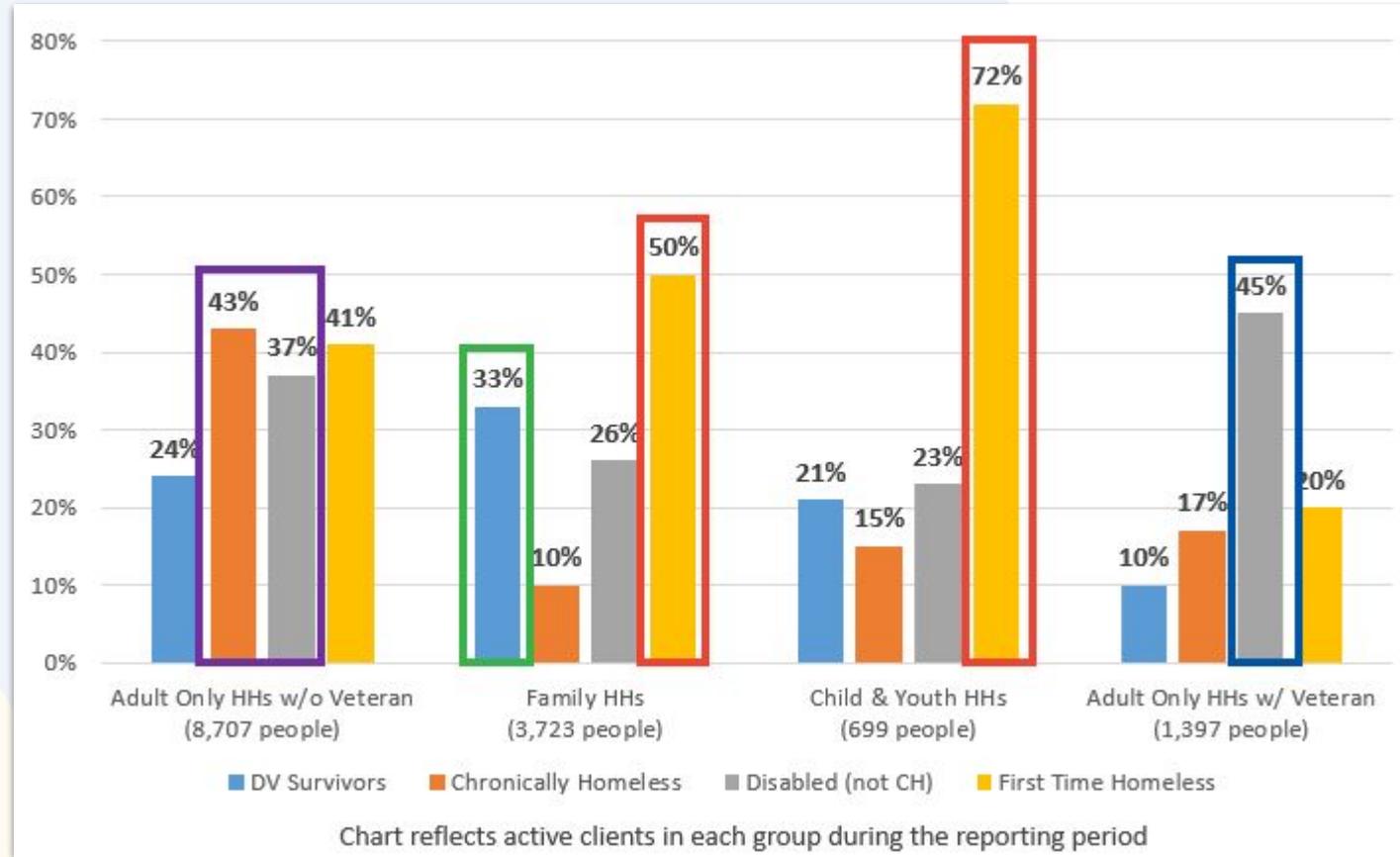
- Adult Only HH w/o Veteran
- Family HHs
- Child & Youth HHs
- Adult Only HHs w/ Veteran



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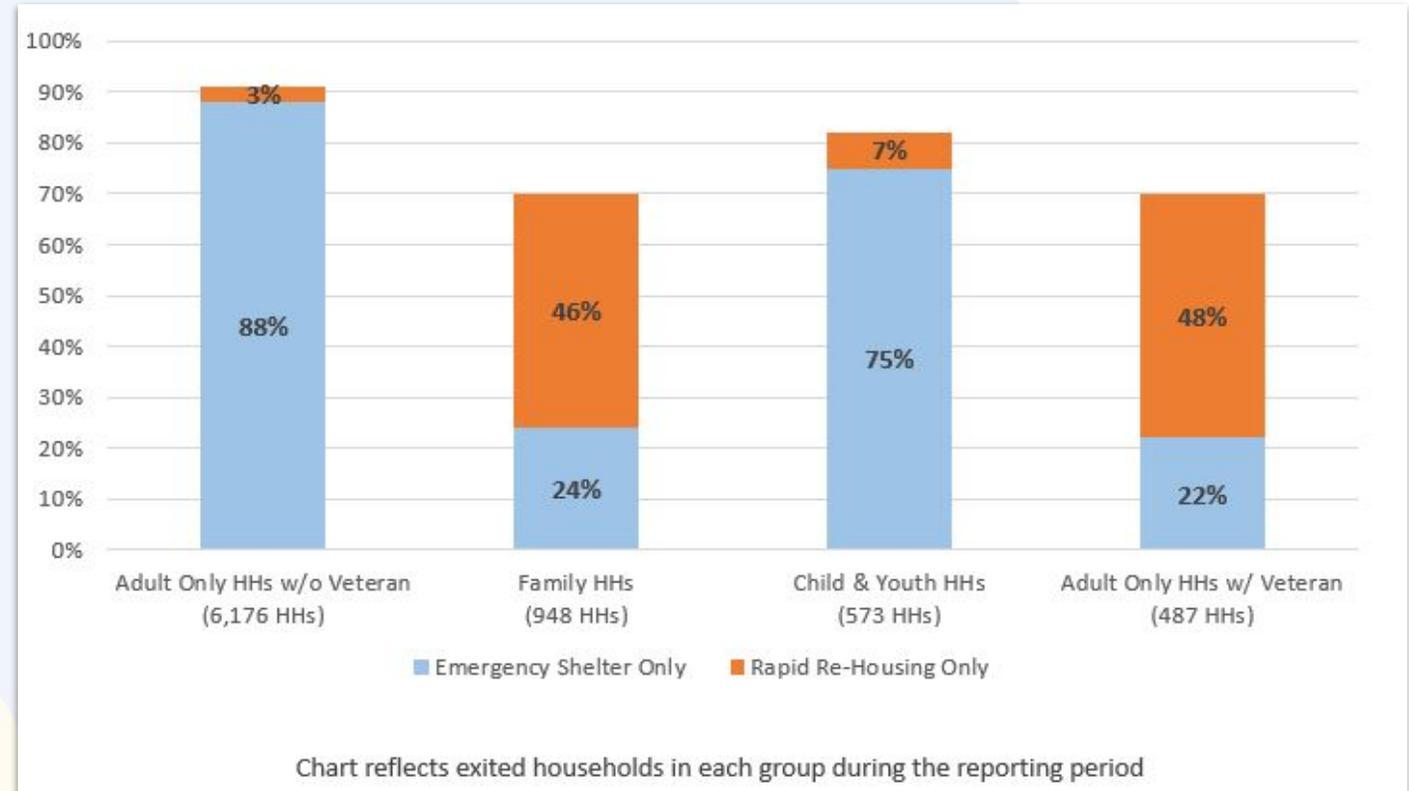
# LSA: Characteristics of People Served

- 80% of clients in Adult Only HHs w/o a Veteran are Chronically Homeless or Disabled
- A higher proportion of DV Survivors are found in Families than other groups
- 3 out of 4 clients in Child & Youth HHs and half of Families are homeless for the first time
- Almost half the clients in Adult Only HHs w/ a Veteran have a disability



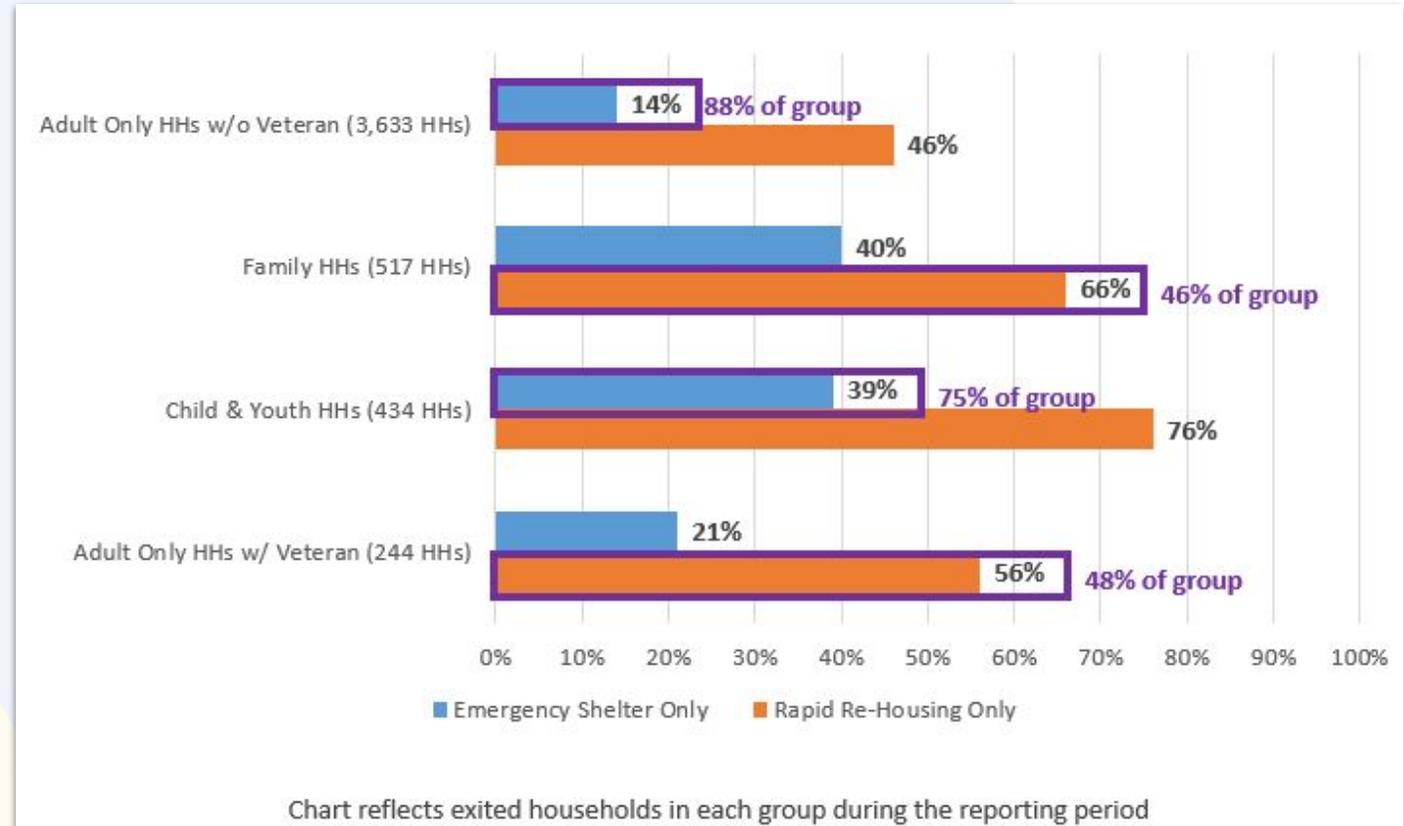
# LSA: Pathways through the System of Care

- Most people served through the system of care are only being served through Emergency Shelter or Rapid Re-Housing
- Most Adult Only HHs w/o Veteran and Child & Youth HHs are being served through Emergency Shelter only
- The most common pathway for Families and Adult Only HHs w/ Veteran is Rapid Re-Housing only



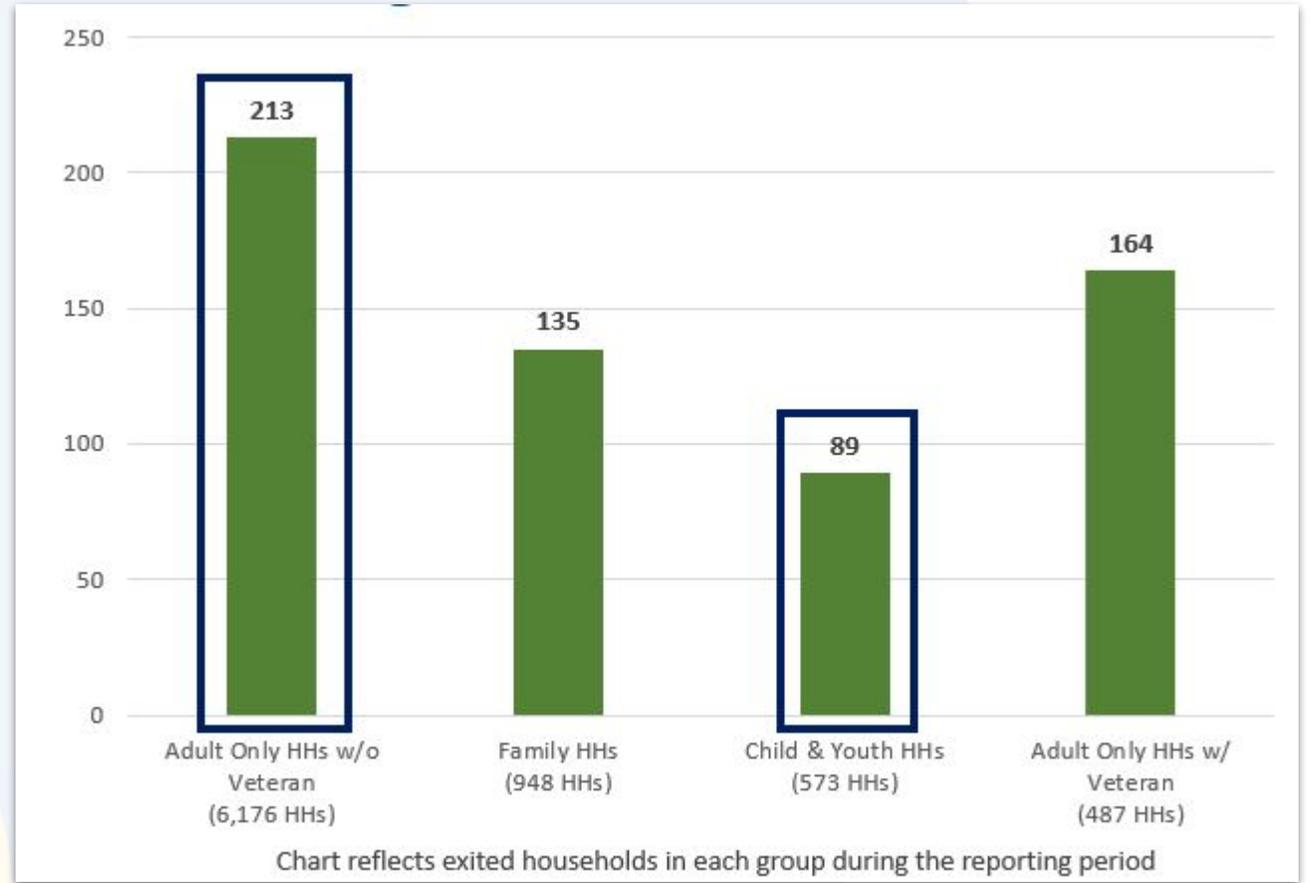
# LSA: Permanent Housing Exits

- Adult Only HHs w/o a Veteran exit to permanent housing at far lower rates than the other groups
- On average, Families are exiting to permanent housing at the highest rates
- Child & Youth HHs exit to permanent housing from RRH at the highest rates of any group
- Low exits to permanent housing from Emergency Shelter for all Adult Only HHs suggest more supportive services are needed



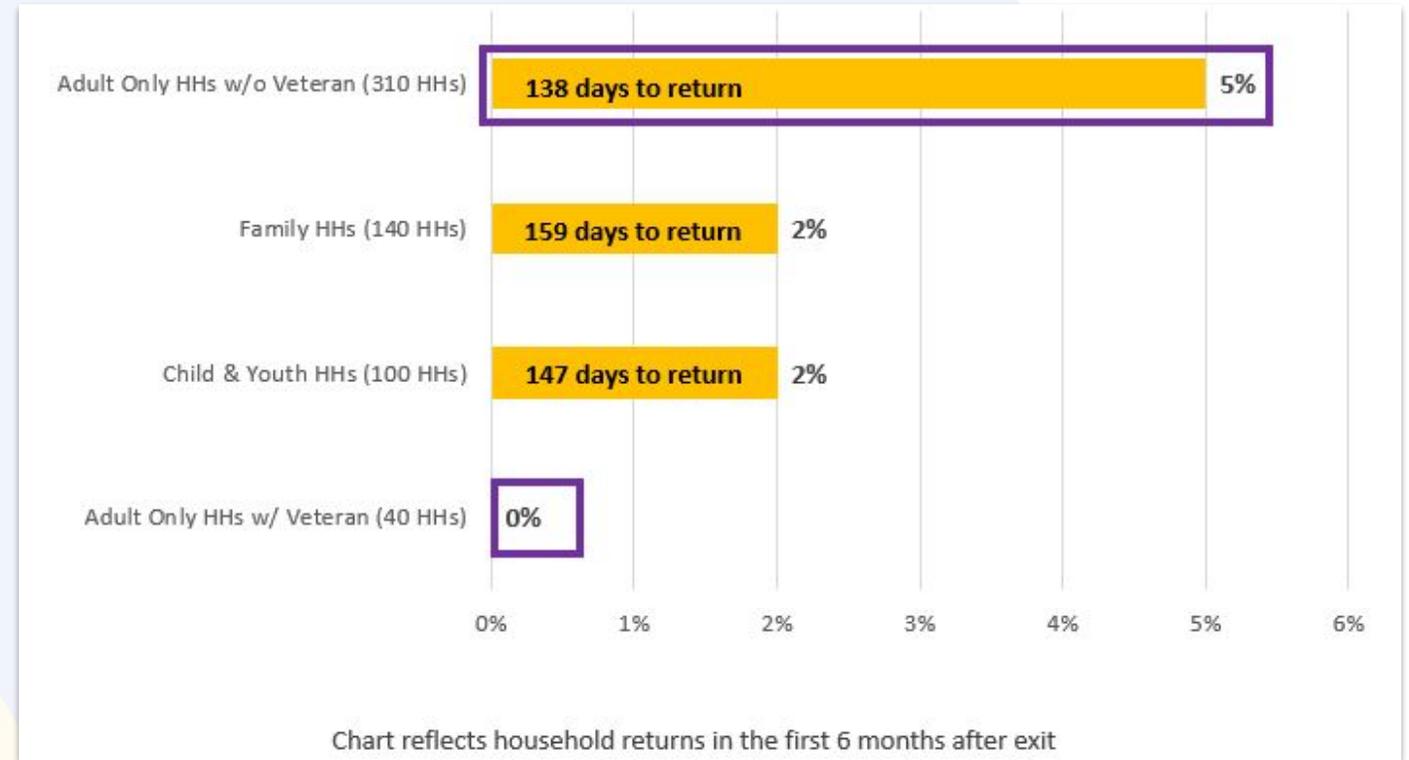
# LSA: Days Homeless in the System of Care

Adult Only HHs w/o a Veteran spend the most time homeless in the system of care, while Child and Youth HHs spend the shortest time homeless



# LSA: Returns to the System of Care

- Adult Only HHs w/o a Veteran return to the system of care after being placed in permanent housing at higher rates, and they return to the system sooner than other groups
- Adult Only HHs w/ a Veteran had no returns to the system of care
- Families and Child & Youth HHs return to the system at a similar rate

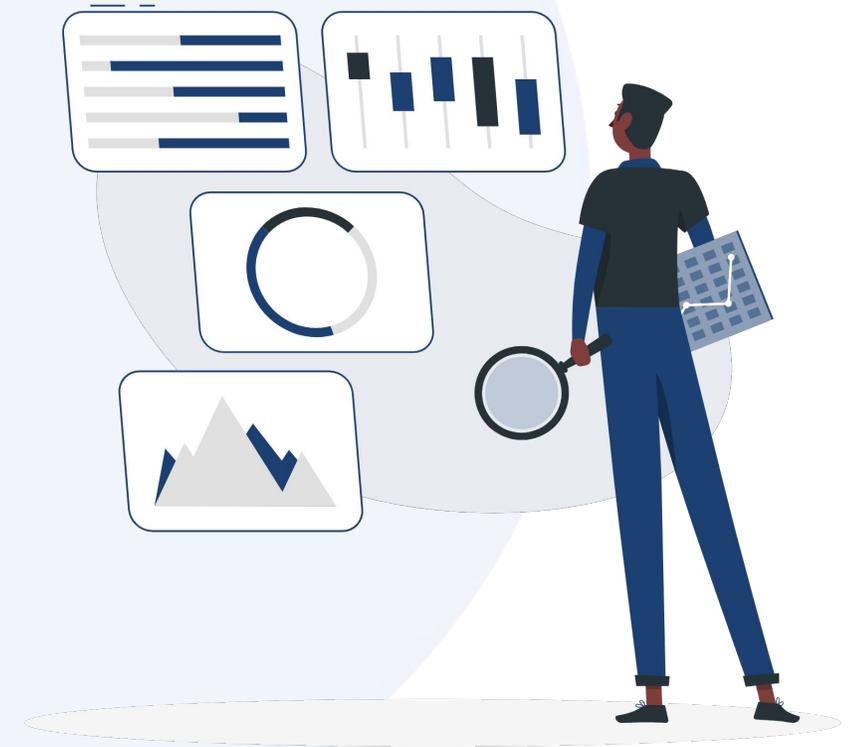


# LSA: Conclusions

Adult Only HHs w/o a Veteran spend more time in the homeless system of care, exit to permanent housing less frequently, and return to the homeless system of care sooner and at higher rates than other groups measured

More housing and supportive services are needed that reflect the needs of each group

- Adult Only HHs w/o a Veteran: Permanent housing with supportive services
- Adult Only HHs w/ a Veteran: Permanent housing with supportive services
- Families: Rapid Re-Housing, Homelessness Prevention, and DV support
- Child and Youth HHs: Rapid Re-Housing and Homelessness Prevention



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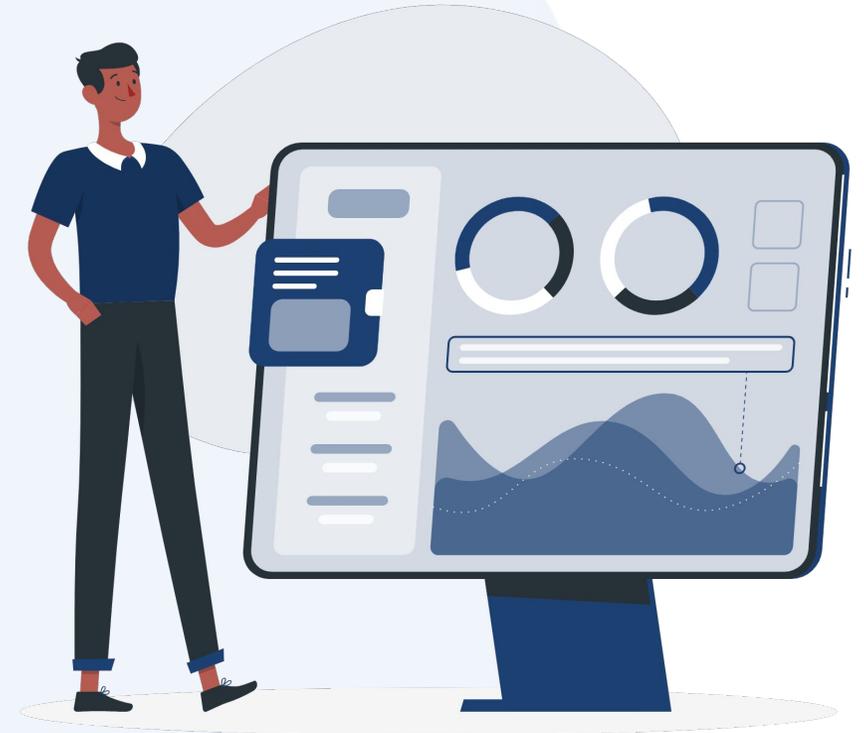
# Project Performance Report (PPR)

The Street Outreach Performance Goals and Outcomes Reports will be published in the upcoming weeks.

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

Corrections for the Homelessness Prevention PPR draft data will be uploaded into DropBox this week.

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 & Performance Management Meeting

## Agenda:

- Quarterly Report Review:
  - Project Performance Reports: Permanent Supportive Housing & Other Permanent Housing, Rapid Re-Housing, Transitional Housing
  - Q2 Data Quality Report Cards
- Discussion - Sharing Agency Contacts for Care Coordination
- Goal 5 - Unit Utilization Report

**Thursday, August 14th @ 1:00 PM - 2 PM**

Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

See [OC HMIS Calendar](#) to find monthly HMIS meeting details.



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# Training and Resources

## OC HMIS Trainings:

HMIS Client Privacy and Data Collection Best Practices  
Tuesday, August 26th @ 1:00pm.  
No need to register in advance.

## Community Resources:

Helpful Coordinated Entry Resources may be found on the Office of Care Coordination's [OC CES Academy website.](#)



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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.

Survey: <https://forms.gle/FgT1wFR1UmaHRBe79>

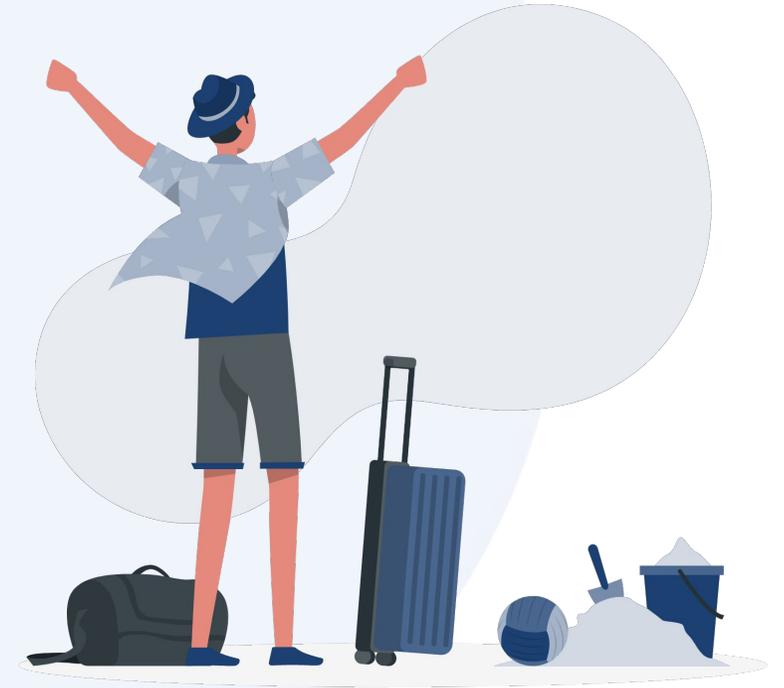


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# Holidays Observed

The HMIS Helpdesk will be closed on **Monday, September 1st** in observance of **Labor Day**.

We will be back in office Tuesday, September 2nd, to assist you.



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# Q&A

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

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



**Thank you  
Have a great day!**

**Next User Meeting: September 3rd**





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