

OC HMIS User Meeting Webinar Minutes
09/03/25

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Agenda Items

HMIS Participating Agencies Schedule

HMIS Agency Audit

- Scheduling July - December

HMIS Part 2 Recertification

- Completed on August 31st

PPR Corrections

- Permanent Supportive Housing & Other Permanent Housing will be added to your agency’s DropBox shortly
 - If you don’t have a Goal 10 spreadsheet in DropBox, your agency didn’t have any exit data during the reporting period of 08/01/2023 - 07/31/2025

[HMIS Participating Agencies Schedule](#)

Understanding Individual Enrollments and Group Enrollments

Clients who are enrolled in a project alone are enrolled as an individual.

- The individual enrollment appears in the Program History of the client enrolled in the project.

Clients who are enrolled in a project with other members are enrolled as a group.

- Group enrollments are created at enrollment or under the program of any of the household members that are already enrolled in the project.

Ensure the client being added to the group enrollment is first added to the Global Household with the other group members. For more information on the Global Household, please review the [Managing Global Households](#) and the [Global VS Program Households](#) Knowledge Base Articles.

To [add individual clients to a group enrollment](#), navigate to the programs tab and open the desired group enrollment.

1. Find the Program Group Members (+) section to view/add a member from the Global Household.
2. Select the clients joining the group enrollment then click ENROLL to complete the client's enrollment.
3. The member will appear under the Program Group Members; the enrollment date will reflect the date the client was added to the group enrollment.

For guidance on adding an individual to a group enrollment, please review the [Enrolling Additional Household Members](#) Knowledge Base Article.

Verbal ROI

Verbal consent is acceptable for a client's Release of Information record until the first in-person meeting with the client occurs.

Verbal consent is NOT a permanent replacement for a completed Consent To Share Protected Personal Information form.

Agencies can run the Clients with Verbal Consent ROI Records report to determine which of their clients are pending an ROI with a wet or electronic signature.

Go to launchpad > reports> data analysis > orange county clarity system reports > Clients with Verbal Consent ROI

For further guidance on Verbal ROI, and instructions on running the Clients with Verbal Consent ROI report, review the [Verbal Consent Guidance](#) Knowledge Base Article.

Contact Information

Please ensure that all participants have updated and accurate contact information in HMIS. If the participant does not have contact information, the current case manager or alternate contact information should be added.

Sharing contact information in HMIS helps coordinate services and communication across all HMIS participating agencies. In addition, it can help streamline the shelter and housing intake process.

For more information about managing contact information in HMIS, please review the [Saving Client Contact Information](#) knowledge base article and view the [Updating Client Contact Information video](#).

Minimum Participation Requirements Report

Per HMIS Policies and Procedures, agencies must meet Minimum Participation Requirements to remain in HMIS. The HMIS team will conduct quarterly reviews to ensure compliance.

Review Items:

- Agency has at least one active user.
- Agency has at least one Agency Administrator that is an active HMIS user.
- Agency has at least one active enrollment under their agency
- Agency has activity in HMIS in the past 30 days under their agency. Activity includes enrollments, services, assessments, files, or exits that have been added or updated in HMIS. (This minimum participation is not applicable to Public Housing Authorities)
- Agency has staff representation for at least one User Meeting during the previous quarter.
- Agency passed the HMIS audit for the previous calendar year.
- Agency submitted the HIC and/or PIT for appropriate project types.

HMIS Agency Admins will receive a quarterly status update of their agency's standing.

Agencies that do not meet requirements will receive documentation of findings with instructions for correction.

Agencies that are not in compliance will also be reported to the Agency Access Working Group for review of continued participation.

In preparation for this review, agency's can pull the following dashboards under Reports » Data Analysis » Orange County Clarity System Reports » Agency Management » Minimum Participation Requirements Report

For additional information, please review the [Minimum Participation Requirements](#) Knowledge base article.

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.

We sent agencies a survey in August regarding this data element and this is the information we received

Survey feedback:

- 35 responses received
- Almost 3 out of 4 respondents (67%) use Gender for reporting purposes or grant applications; the remainder said they don't use Gender beyond the required data collection
- 6 agencies stated they use Gender to determine eligibility in at least one project
- 40% of respondents said they would like to continue collecting Gender

Qualitative feedback:

- Gender is needed to link people with appropriate resources and understand gaps in service
- Disregarding Gender is insensitive and may alienate some people, which may result in a lack of trust in the agencies working with them
- Gender is particularly important to be collected for TAY, as this may be a cause of their homelessness

Implementation Plan:

- The Gender data element will remain available in HMIS as an optional data element to allow agencies that want to collect it to continue to do so
- Gender will not be included on future reports published on the ochmis.org website, like the PIT report and CoC Dashboard

HMIS Part 2 Recertification

The [HMIS Recertification](#) is completed for 2025.

Users that did not complete the test by August 31st had their HMIS accounts set to inactive.

If your HMIS account was set to inactive you have until **Sept 19th** to complete the following trainings:

- All HMIS Users, including Read Only Access, will be required to complete the [HMIS Privacy and Security online course](#).
- Those with **data entry access will also be required** to take the 2025 [HMIS Part 2 Recertification Skills Test](#) (Users with Read Only accounts are excluded).

If the September 19th deadline is missed, users will need to retake the HMIS Part 1, and Part 2 Training courses in addition to the HMIS Skills Test. This only applies to users that were on the HMIS Recertification list for 2025.

Project Exit Date

Timely and accurate [Project Exit Dates](#) are important because they impact the following:

All Projects

- Number of active enrollments
- Length of stay in project
- Number of successful exits
- Count of housed
- Count of unhoused
- Count of unduplicated persons served
- Count of positive housing destinations

CES Projects

- Number of participants still on Community or Bed Reservation Queue
- How long a participant waits for a unit or bed

[EXIT-101] Potential Exits can be used to check the current list of enrollments without services and case notes, for potential exits. Recommended to run at least monthly if a shelter/housing provider and weekly (or daily if agency has capacity) for open opportunities.

Project Exit Date Overview per project in HMIS

- Street Outreach
 - If a client is referred to an Emergency Shelter (ES) or Transitional Housing (TH) project, the client should be exited on the date they enrolled into the ES or TH project
 - If the client was referred to a Rapid Re-Housing, Permanent Supportive Housing, Other Permanent Housing project, the client should be exited from the SO project with an exit date of the client's housing move in date in the project they were referred to.
 - If staff have not made any contact with the client within **60 days**, the exit date is the last contact date.
- Emergency Shelter/Transitional Housing (Site Based Residential Projects)
 - The exit date represents the last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project. For example, if a person checked into an overnight shelter on January 30, 2025, stayed overnight, and left in the morning, the exit date for that shelter stay would be January 31, 2025.
- Tenant-based Permanent Housing (Permanent Housing projects, including Rapid Re-Housing)
 - The exit date represents the last day the client receives rental assistance or supportive services (RRH) **OR** is provided rental assistance (tenant-based PSH, transition-in-place, or other permanent housing)
- Services Only (Non-residential. Includes Homelessness Prevention)
 - The last day a service was provided or the last date of a period of ongoing service.

Note: Agencies that offer ongoing services after exits (for example Street Outreach projects) must set up a services only project to track the ongoing services there. Once the client enrolls into ES/TH or RRH/PSH-OPH, the client is no longer on the street and must be exited from Street Outreach.

2025 HIC and Sheltered PIT

The Housing Inventory Count (HIC) is a point-in-time inventory of housing programs within a Continuum of Care that provide beds and units dedicated to serve people experiencing homelessness (ES, TH, RRH, PSH, and Other PH)

The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. Our CoC conducts the sheltered PIT on an annual basis which includes all people experiencing homelessness who are sheltered in Safe Haven, Emergency Shelter, and Transitional Housing. This year's sheltered PIT was conducted on 1/27/2025, the unsheltered count was not conducted this year.

This year's HIC counted 10,232 beds, an increase of 420 beds or 4% compared to last year. ES, TH, PSH, and Other PH programs all saw an increase in bed count, but RRH programs decreased in bed capacity.

The Sheltered PIT increased by 388 people since last year's count, for a total of 3,537 people experiencing sheltered homelessness. The majority of this increase was in Adult Only households. There was a significant increase in Chronically Homeless individuals and families since the last Sheltered PIT. This is in part due to

households remaining in Emergency Shelters for over a year. Senior and Youth populations both increased since the previous Sheltered PIT, while Veterans and Domestic Violence Survivors decreased.

People who identify as American Indian/AK Native, Black/African American, Hispanic/Latina/e/o, Middle Eastern/North African, or Native Hawaiian/API are all experiencing homelessness at higher rates than their representation in the Orange County population, while those that identify as Asian/Asian American are experiencing homelessness at lower rates.

Data Accuracy Dashboard Report

The *Data Accuracy Dashboard* is a report made available for HMIS users to provide a broad overview of the accuracy of their agency's HMIS data. The dashboard can be filtered by:

- Reporting Period
- Project Type
- Project Name

Agency administrators should review the *Data Accuracy Dashboard* once per month for all projects at their agency to assess the accuracy of their HMIS data. The dashboard information should be shared with relevant staff members for further review and verification of client information entered into HMIS. Any dashboard information that does not reflect real client information should be corrected by the relevant staff member.

HMIS users can locate the *Data Accuracy Dashboard* in Clarity HMIS by navigating to:

Reports > Data Analysis > Orange County Clarity System Reports > Data Quality > Data Accuracy Dashboard

System Performance Measures and Longitudinal System Analysis (LSA)

SPM and LSA are annual federal reports submitted to HUD that provides insight into our CoC system of care. Data represent our CoC performance and the clients' pathways/participation.

Reporting Period: 10/01/2024 - 09/30/2025

Reports to run: Pathway: Reports > Data Analysis > Orange County System Reports

- Data Accuracy Dashboard
- [Agency Set-Up Review](#)

Pathway: Reports > Data Analysis > [Built In Reports LSA Data Cleanup](#):

- Head of Household Data
- LSA Data Cleanup: Overlapping Enrollments

Project Performance Report

The Homeless Prevention (HP) PPR will be published in the upcoming weeks.

Current and past PPRs can be found on the [Orange County HMIS website](#), by navigating to: Reports > [Project Performance Reports](#)

Corrections for the Permanent Supportive Housing (PSH) 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.

Training and Resources

Upcoming Trainings:

[HMIS Client Privacy and Data Ethics](#)

- Thursday, September 4th @ 1:00pm
- No need to register in advance

[HMIS Reports Office Hours](#)

- Wednesday, September 24th @ 10:00am
- No need to register in advance

More information about upcoming trainings can be found on the [OC HMIS Calendar](#)

Community Resources:

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

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/4PKS6U272SM77B1B8>

Q&A

Project Exit Date

- Q: If there is no contact in a Street Outreach project with a participant, after how many days should an exit be completed? 30 or 60 days?
 - A: If staff has not made any contact with the client within 60 days of the last contact date. The exit date should be set to the last date the client received services and not the date a staff is processing

the exit. If the entry date is the last time a staff had contact with the client, the exit date would be set to that entry date. Exit Destination would be set to "No Exit Interview Completed". Please refer to the [Street Outreach Exiting Protocol](#) knowledge base article for additional information.

- Q: If we find that client's data is inaccurate, do we fill out a new intake/status form, or simply update in Clarity?
 - A: Please make those updates directly in Clarity so the data is reflecting the correct data within the database.

2025 HIC and Sheltered PIT

- Q: Is that a comparison of OC population (all) or does that consider those who are lower income only?
 - A: Comparison is all of the OC population.

Training and Resources

- Regarding the HMIS Reports Office Hours, is that going to be just going over reports or is it a Q&A session?
 - It is both we will cover reports that would be helpful to run for the SPM and LSA prep. We will also open up to questions regarding the reporting.

General Questions

- Q: With an annual assessment, and it was reported that there is a change. Should I also change it on the current enrollment to reflect?
 - A: Please keep the enrollment data as is to reflect the participant's data at intake. When there are changes, you can enter a status assessment or annual assessment. Please review this KB for additional information: [Status and Annual Assessments](#)

Future Meeting Information

October 2025 HMIS User Meeting Webinar

- Date: Wednesday, October 1st, 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.