Agenda

1. HMIS Participating Agencies Schedule
2. Understanding Individual Enrollments and Group Enrollments
3. Verbal ROI
4. Contact Information
5. Minimum Participation Requirements Report
6. Gender Data Element
7. HMIS Part 2 Recertification
8. Project Exit Date
9. 2025 HIC and Sheltered PIT
10. Data Accuracy Dashboard Report
11. System Performance Measures and Longitudinal System Analysis (LSA)
12. Project Performance Report
13. Training and Resources
14. Survey
15. Q&A
16. 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, Novemeber	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 @ 10:00AM	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
  - 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

Graphic by: https://storyset.com/online
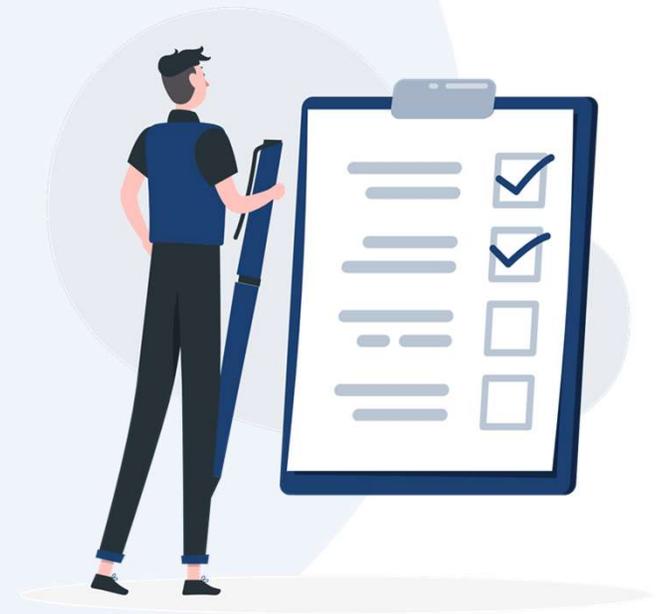
Understanding Individual Enrollments and Group Enrollments

Individual 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.

Group Enrollments

- 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.

Understanding Individual Enrollments and Group Enrollments

Before adding a client to an existing group enrollment, they must first be added to the [Global Household](#) with other members of the group.

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

Find the Program Group Members (+) section to view/add a member from the Global Household.

Select the clients joining the group enrollment then click ENROLL to complete the client's enrollment.

The member will appear under the Program Group Members; the enrollment date will reflect the date the client was added to the group enrollment.

Adding Individuals to Group Enrollments Demo

START DEMO

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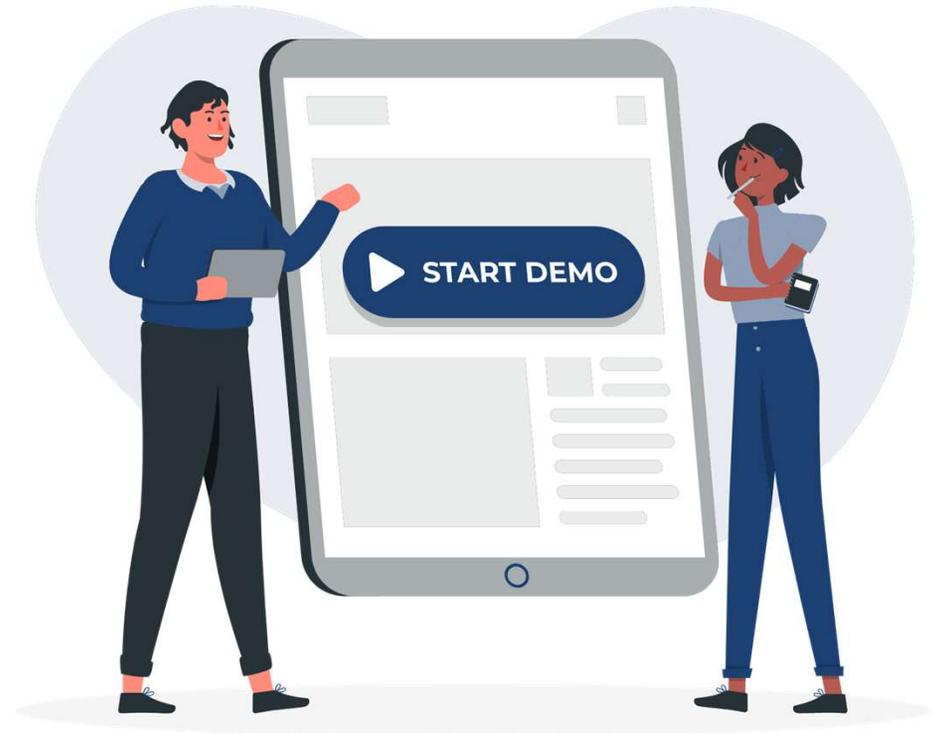
Verbal ROI

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.

Please ensure client contact information is updated.

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.

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Minimum Participation Requirements Report

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.

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Minimum Participation Requirements Report Demo

START DEMO
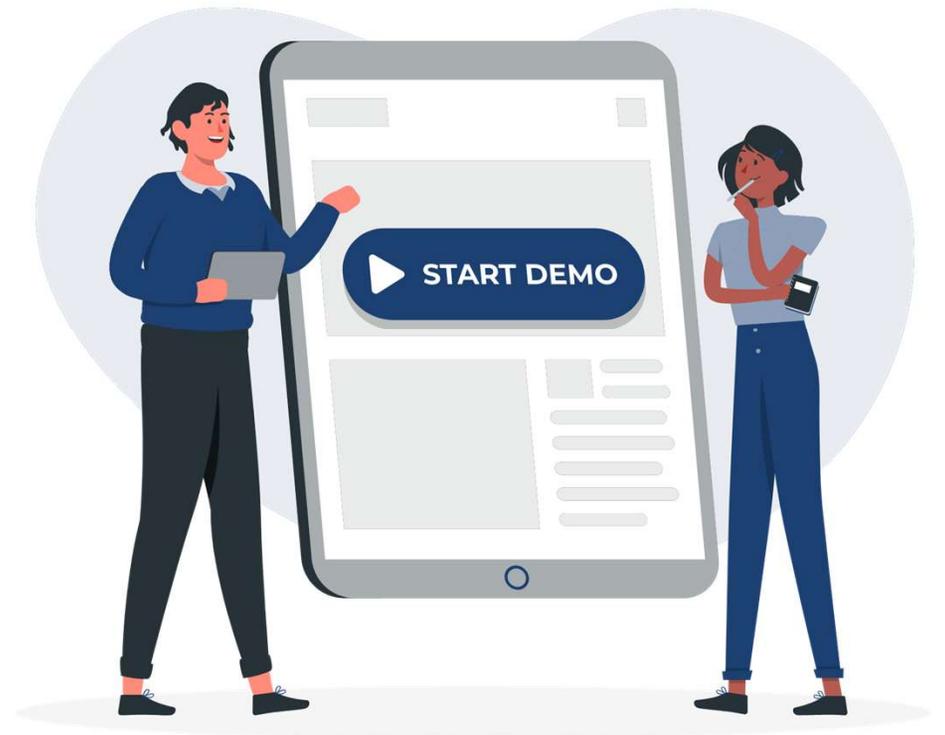
Gender Data Element

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

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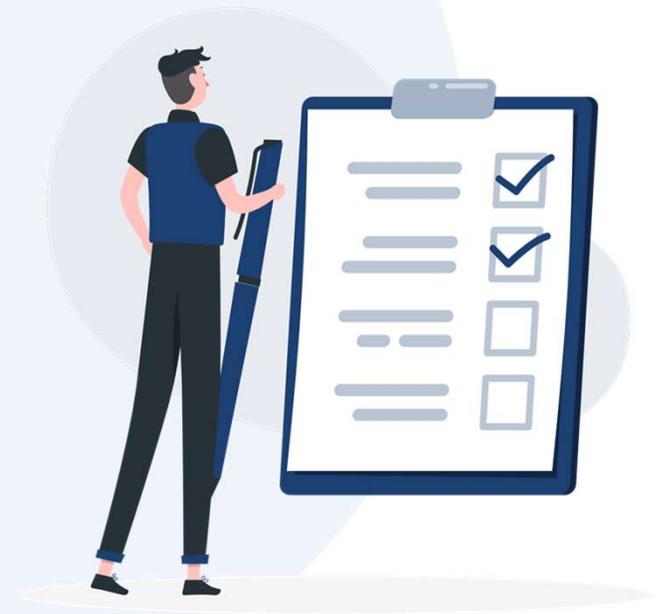
Gender Data Element

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

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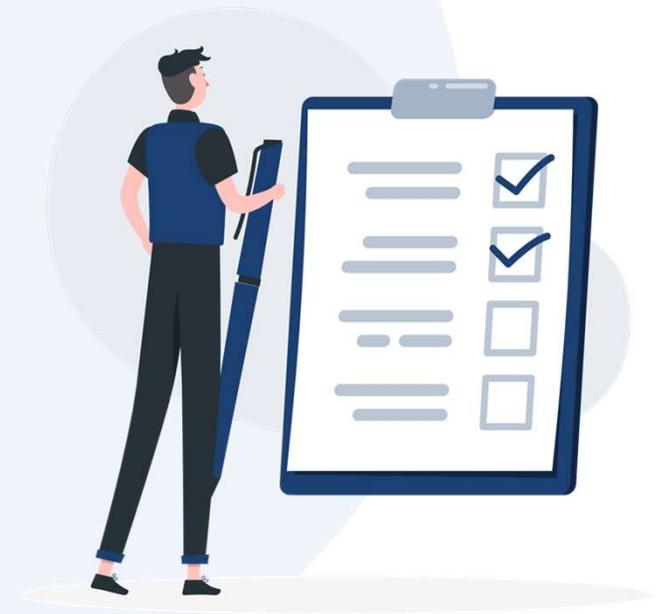
2025 HMIS Recertification

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](#).

  - **Users 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.

Users that miss the Sept 19th deadline, 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..

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OC HMIS Part 2 Recertification

Please complete tasks 1 through 12 in order on the Clarity training site. You may log in with the training credentials provided by your Agency Administrator. If your Agency Administrator does not know their agency's log-in information for the Clarity training site, they should enter a ticket with the HMIS Help Desk.

When entering client information for this exercise, you may enter any false information you like unless otherwise specified. For this training, you will need to complete all of the tasks under the **OC Agency Training** agency in the Clarity training site.

Complete the following exercises. Make a note of the Unique Identifier for any client records created during the exercise, as this information will need to be sent to 211OC.

1. **Add a client record and complete a Release of Information for the client.** The Permission dropdown for the ROI should reflect that the client has agreed to share their data in HMIS.
2. **Add another client record and Release of Information.** The Permission dropdown for the ROI should reflect that the client has agreed to share their data in HMIS.
3. **Add Client 2 to Client 1's Global Household.** Ensure that Client 1 is the head of household.
4. **Enroll the household in Project 1.** Ensure that Client 1 is the group enrollment head of household. You may select any of the projects listed under the OC Training Agency. The Project Start Date for both clients should be 05/01/25.
5. **Complete a Status Assessment for Client 1 and Client 2 under their enrollments.**
6. **Complete an Annual Assessment for Client 1 and Client 2 under their enrollments.**
7. **Create a new client record.** The ROI section should reflect that the client has not consented to share their data in HMIS.
8. **Add Client 3 to the global household.**
9. **Enroll Client 3 into Project 1** (the same project you initially enrolled Client 1 and Client 2 into), and make sure Client 3 is in the same household as Clients 1 and 2. The Project Start Date for Client 3 should be 05/15/25.
10. **Exit all 3 clients from the project.** The Project Exit Date should be 05/30/25.
11. **Enroll all three clients into a new project, Project 2, that is different from the previous enrollment they have.** The Project Start Date should be 06/01/25.
12. **Remove Client 1 from the Global Household on the Profile screen. Exit Client 1 from the project.** Client 2 and Client 3 should remain enrolled in the project. Client 2 should be the new Head of Household. The Project Exit Date for Client 1 should be 06/30/25.

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 folks 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 current list of enrollments without services and case notes, for potential exits. Recommended to run at least monthly if shelter/housing provider and weekly (or daily if agency has capacity) for open opportunities.

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Project Exit Date

Project	Project Exit Date in HMIS
Street Outreach	Clients enrolled in Street Outreach (SO) projects should be exited in the following manner: ● 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 has not made any contact with the client within *60 days,* the exit date is the last contact date.
Site Based Residential Projects: Emergency Shelter/Transitional Housing	The exit date represent the last day of continuous stay in the project before the client transfer 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.

Project Exit Date

Project	Project Exit Date in HMIS
Tenant-based Permanent Housing Projects: Permanent Housing, 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)
Non-residential projects: Services Only, 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.

Data Accuracy Dashboard Overview

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 Admins 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

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

Data Accuracy Dashboard Demo
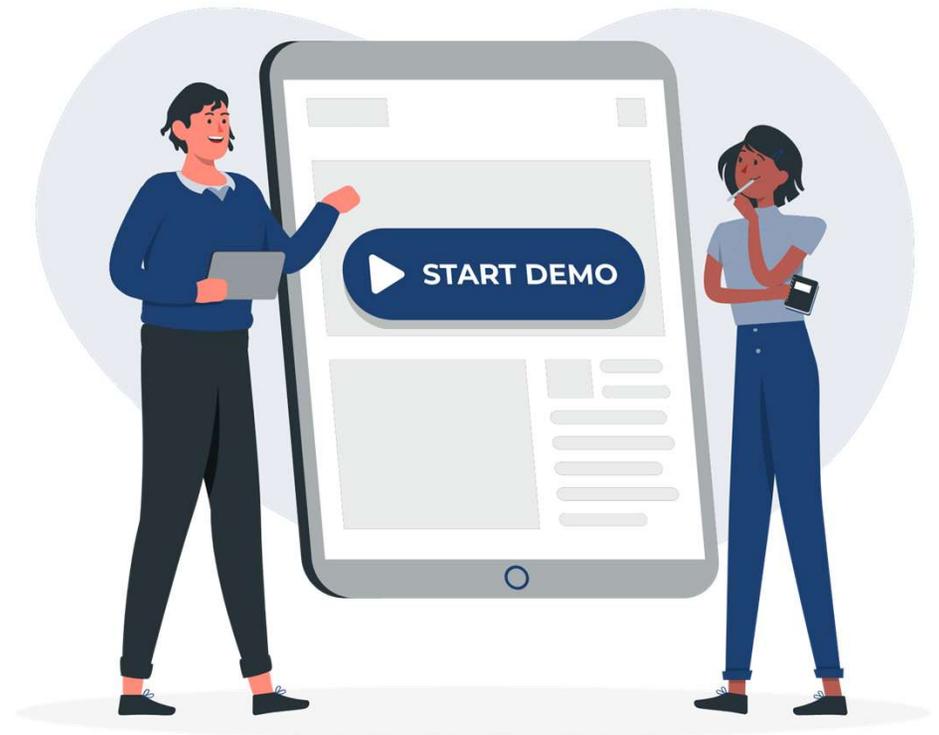
2025 Housing Inventory Count (HIC) and Sheltered Point-in-Time Count (PIT)

- 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

- The **Point-in-Time (PIT)** count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January (1/27/2025). 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.

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

2025 Housing Inventory Count (HIC)

🛏️ Total Beds Counted: 10,232 beds

📈 +420 beds compared to previous year (+4%)

Project Type	Change
Emergency Shelter	⬆️ Increase (3.2%)
Transitional Housing	⬆️ Increase (6.5%)
Permanent Supportive Housing	⬆️ Increase (4.4%)
Other Permanent Housing	⬆️ Increase (15.4%)
Rapid Re-Housing	▼ Decrease (21.6%)

Total Bed Count by Project Type

● 2023 ● 2024 ● 2025

The total for Orange County's 2025 Housing Inventory Count is 10,232 beds, a 420 bed increase from 2024. Total excludes under development and overflow beds.

	Emergency Shelter - Year Round	Transitional Housing	Rapid Re-Housing	Permanent Supportive Housing	Other Permanent Housing
2023	2814	844	1304	2917	2122
2024	3030	841	869	2990	2082
2025	3129	896	681	3123	2403

2025 Housing Inventory Count (HIC) Project Type Data

Bed Count by Project Type and Bed Type
Excludes under development, seasonal, and overflow beds.

● Adults Only ● Children and Adults ● Children Only

Project Type	Adults Only	Children and Adults	Children Only
Emergency Shelter - Year Round	82%	17%	
Transitional Housing	34%	66%	
Rapid Re-Housing	43%	57%	
Permanent Supportive Housing	59%	41%	
Other Permanent Housing	68%	32%	

Percent of Beds
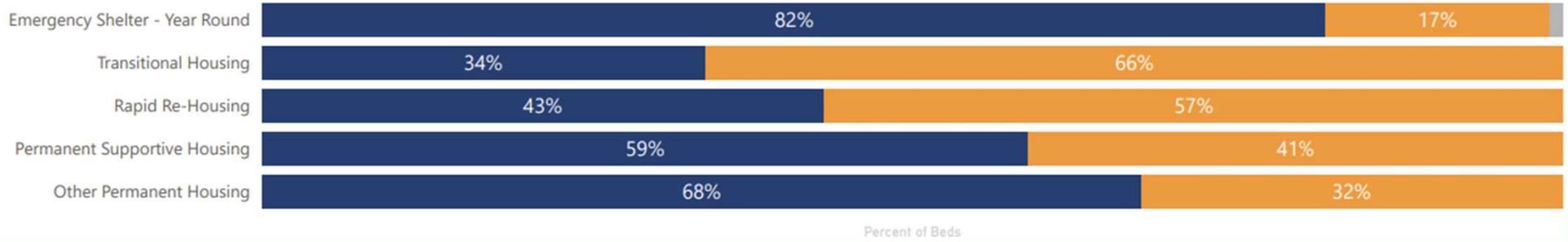
Bed Utilization
Includes year-round, seasonal, and overflow beds

Project Type	Beds	Bed Utilization Rate
Emergency Shelter	3234 Beds	88%
Transitional Housing	896 Beds	77%
Rapid Re-Housing	681 Beds	100%
Permanent Supportive Housing	3123 Beds	91%
Other Permanent Housing	2403 Beds	96%

Bed Utilization Rate

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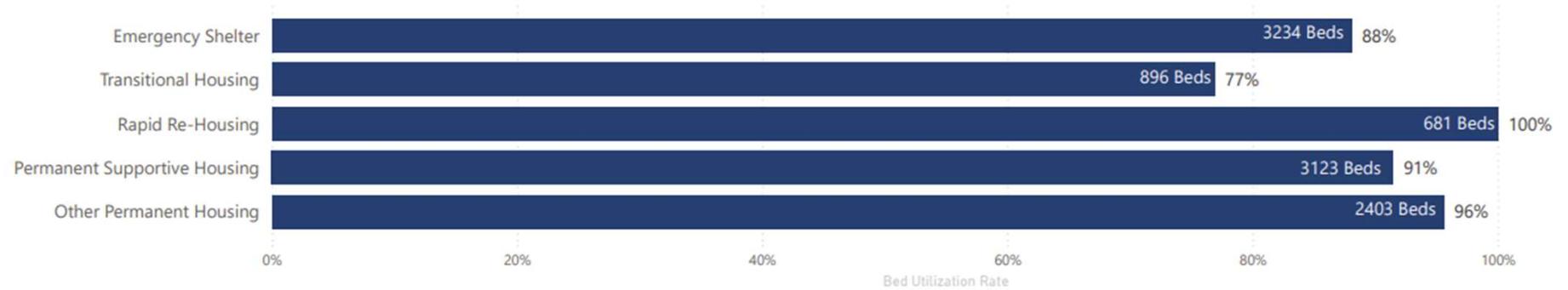
2025 Sheltered Point-In-Time Count (PIT)

Sheltered PIT Count from 2023 to 2025

● 2023 ● 2024 ● 2025

	Adults Only	Adults and Children	Children Only
2023	2029	953	11
2024	2195	948	6
2025	2564	965	8

Count of Beds
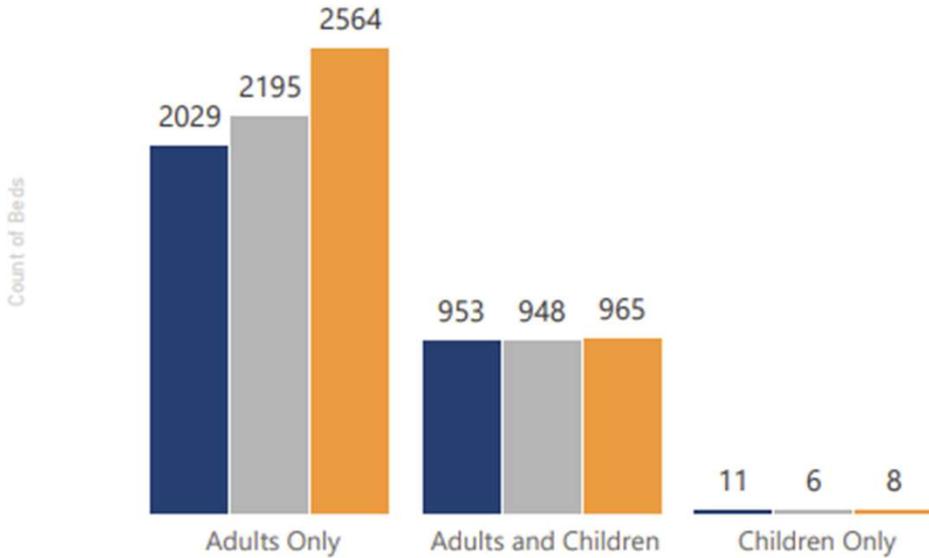
👥 Total Sheltered PIT Count: 3537 people

📈 +388 from last year (12.3%)

◆ Majority increase in Adult Only households

Key Population Changes:

Group	Change
Chronically Homeless	⬆️ Increase
Seniors	⬆️ Increase
Youth	⬆️ Increase
Veterans	▼ Decrease
Domestic Violence Survivors	▼ Decrease

2025 Sheltered Point-In-Time Count (PIT) Demographic Data

Race/Ethnicity Comparison of Sheltered People to the OC Population

- American Indian or AK Native (only)
- Asian or Asian American (only)
- Black or African American (only)
- Hispanic/Latina/e/o (of any race)
- Middle Eastern or North African (only)
- Multi-Racial (not Hispanic/Latina/e/o)
- Native Hawaiian or API (only)
- White (only)

Orange County Population
22% | 34% | 4% | 38%

2025 Sheltered PIT
4% | 10% | 40% | 4% | 39%

This chart compares the Race/Ethnicity of people served in shelters to the Orange County population. Groups that have a higher representation in shelters than in the OC Population are experiencing homelessness at higher rates. Groups that have a lower representation in shelters than in the OC Population are experiencing homelessness at lower rates.

0% 20% 40% 60% 80% 100%

Note: Some racial/ethnic groups are overrepresented in homelessness compared to their share of the OC population

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System Performance Measures (SPM) 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

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

Project Performance Report (PPR)

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.

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

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.

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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/4PKS6U272SM77B1B8

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

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