

# March 2026 OC HMIS User Meeting

211

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Orange County  
**UNITED WAY**

# Agenda

1. HMIS Participating Agencies Schedule
2. Overlapping Enrollments
3. HIC and Sheltered PIT Reminder
4. Reassign Case Manager
5. Data Element Highlight: Profile Universal Data Elements
6. Client Record Request Overview
7. Sage APR
8. HMIS Policies and Procedure Survey
9. Project Performance Report - Goal 5 Overview
10. Project Performance Report
11. Training and Resources
12. Survey
13. Holiday
14. Q&A
15. 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

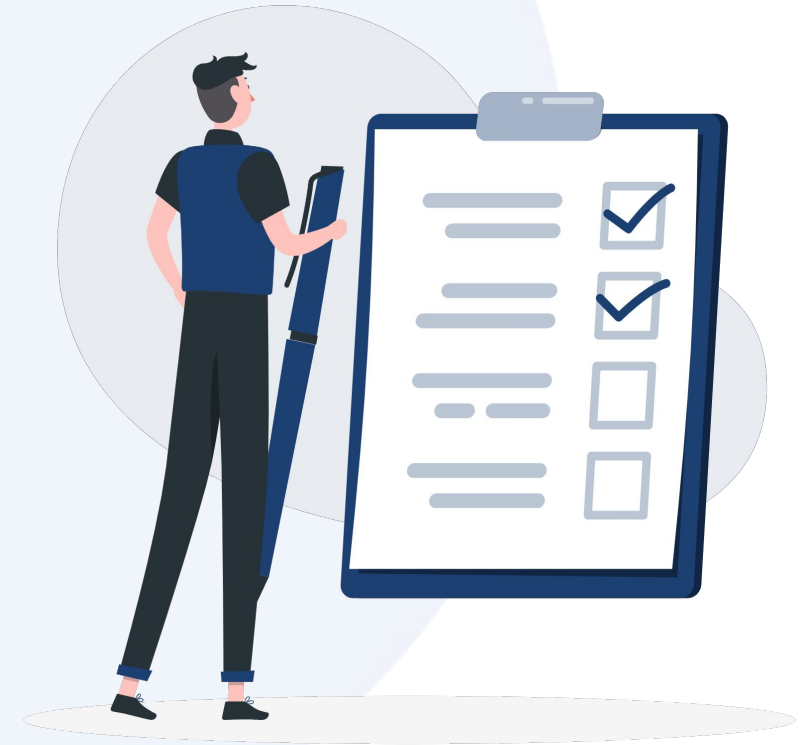
HMIS Participating Agencies Schedule																	
 																	
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required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

HMIS Participating Agencies Schedule



# HMIS Participating Agencies Schedule

- HIC and Sheltered PIT
  - Agencies will do a final review and approval of the data by March 27th
- Project Performance Report (PPR) Corrections
  - Permanent Supportive Housing & Other Permanent Housing 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 02/01/2024 - 1/31/2026
    - Please review the [PPR Webinars](#) for additional information about running and review PPR Goals 1 - 10 for your agency's programs



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

# Overlapping Enrollments

Overlapping enrollments between projects other than Services Only greatly impacts the unit\* utilization scores for the CoC.

When unit utilization is higher or lower than expected for a project, agencies should review their data for the following overlap issues that HUD has classed into levels:

- Level 1: Entry-to-Exit Dates
- Level 2: Bed Night Dates
- Level 3: Housing Move-in Dates
- Level 4: Entry-Exit Dates

\*unit refers to bed or a residential unit



Source: <https://files.hudexchange.info/resources/documents/>

# Overlapping Enrollments

## Level 1 Error Overview:

Occur when a household is enrolled in multiple residential projects that use Entry and Exit Date to indicate the household is occupying the unit. These overlaps are often caused by data entry errors, such as missing exit dates or duplicate enrollments.

## Applicable projects:

- Emergency Shelters (Entry/Exit)
- Transitional Housing
- Safe Haven

Any overlap between entry/exit dates of these project types will result in erroneous data 100% of the time because a household cannot occupy two units on the same night.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
Emergency Shelter (1) start-to-end date range (w/in report dates)	Emergency Shelter (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter start-to-end date range (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter start-to-end date range (w/in report dates)	Safe Haven start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Safe Haven (1) start-to-end date range (w/in report dates)	Safe Haven (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Safe Haven start-to-end date range (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Transitional Housing (1) start-to-end date range (w/in report dates)	Transitional Housing (2) start-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible

Source: <https://files.hudexchange.info/resources/documents/>

# Overlapping Enrollments

## Level 2 Error Overview:

Occur when a household is enrolled in multiple residential projects that use the Entry Date and Exit Date, and projects that use Bed Night Date to indicate occupancy.

## Applicable projects:

- Emergency Shelters (Entry/Exit and NbN)
- Transitional Housing
- Safe Haven

Any overlap of more than two consecutive days should be fixed nearly 100% of the time; overlaps of one or two days should be explained.

Inventory/Enrollment #1	Inventory/Enrollment #2	DQ Analysis Issue
Emergency Shelter start-to-end date range (w/in report dates)	Emergency Shelter Bed Night (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.
Emergency Shelter (1) Bed Night (w/in report dates)	Emergency Shelter (2) Bed Night (w/in report dates)	A bed night recorded in two different Emergency Shelter nbn projects on the same date for the same household is physically impossible and should be resolved 100% of the time
Emergency Shelter Bed Night (w/in report dates)	Safe Haven start-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.
Emergency Shelter Bed Night (w/in report dates)	Transitional Housing start-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.

Source: <https://files.hudexchange.info/resources/documents/>

# Overlapping Enrollments

## Level 3 Error Overview:

Occur when a household is enrolled in multiple residential projects that use the Entry Date and Exit Date, projects that use Bed Night Date, and projects that use Move-in Date to indicate occupancy.

## Applicable projects:

- Emergency Shelters (Entry/Exit and NbN)
- Transitional Housing
- Safe Haven
- PSH, RRH, or OPH

Any overlap of more than two consecutive days should be fixed nearly 100% of the time. Overlaps with or between Move-In Dates is physically impossible is must be corrected.

		Jan 1	Jan 2	Jan 3	Jan 4	Jan 5	Jan 6	Jan 7	Jan 8	Jan 9	Jan 10	Jan 11	Jan 12	
<b>Client 1</b>	Project 1 (ES-EE <sup>1</sup> )	No Potential Data Quality Issue												
	Project 2 (TH <sup>2</sup> )						No Potential Data Quality Issue							
<b>Client 2</b>	Project 1 (ES-EE <sup>1</sup> )	Potential Data Quality Issue												
	Project 2 (TH <sup>2</sup> )		Potential Data Quality Issue											
<b>Client 3</b>	Project 1 (ES-EE <sup>1</sup> )	No Potential Data Quality Issue												
	Project 2 (PSH <sup>3</sup> )						Move-In	No Potential Data Quality Issue						
<b>Client 4</b>	Project 1 (ES-EE <sup>1</sup> )	Potential Data Quality Issue												
	Project 2 (PSH <sup>3</sup> )					Move-In	Potential Data Quality Issue							

<sup>1</sup> ES-EE – Emergency Shelter Entry-Exit  
<sup>2</sup> TH – Transitional Housing  
<sup>3</sup> PSH – Permanent Supportive Housing

Safe Haven start-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Transitional Housing start-to-end date range (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap by any number of days is physically impossible
Emergency Shelter Bed Night (w/in report dates)	RRH, PH-Housing Only, PH-Housing with Services Housing Move-In Date-to-end date range (w/in report dates)	Any overlap of more than two consecutive days should be fixed; one or two days should be explained.

Source: <https://files.hudexchange.info/resources/documents/>

# Overlapping Enrollments

In some cases households may be co-enrolled in a Supportive Services Only program when one agency is providing the supportive services and another is funding the unit (responsible for reporting on utilization).

## Examples:

Street Outreach -> Emergency Shelter: The household could be enrolled in a Services Only program for the provider to track warm hand off services.

ES -> PSH, PH, OPH: The household could be enrolled in a Services Only program for the Emergency Shelter provider to track warm hand off services.

Source: <https://files.hudexchange.info/resources/documents/>

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Non-Federally Funded Services Only Training Project Services Only OC Training Agency ⓘ	02/02/2026	Active	Individual
ESG Funded Emergency Shelter Training Program Emergency Shelter – Entry Exit OC Training Agency ⓘ	02/02/2026	Active	Individual
ESG Funded Street Outreach Project Street Outreach OC Training Agency ⓘ	01/01/2026	02/01/2026	Individual

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Non-Federally Funded Services Only Training Project Services Only OC Training Agency ⓘ	02/28/2026	Active	Individual
ESG Funded Rapid Re-Housing Training Project PH – Rapid Re-Housing OC Training Agency ⓘ	02/02/2026	Active	Individual
ESG Funded Emergency Shelter Training Program Emergency Shelter – Entry Exit OC Training Agency ⓘ	01/01/2026	02/28/2026	Individual

# 2026 HIC and Sheltered PIT Reminder

## Thank you!

Thank you for all of your help in getting our data ready for the submission of the 2026 HIC & Sheltered PIT!

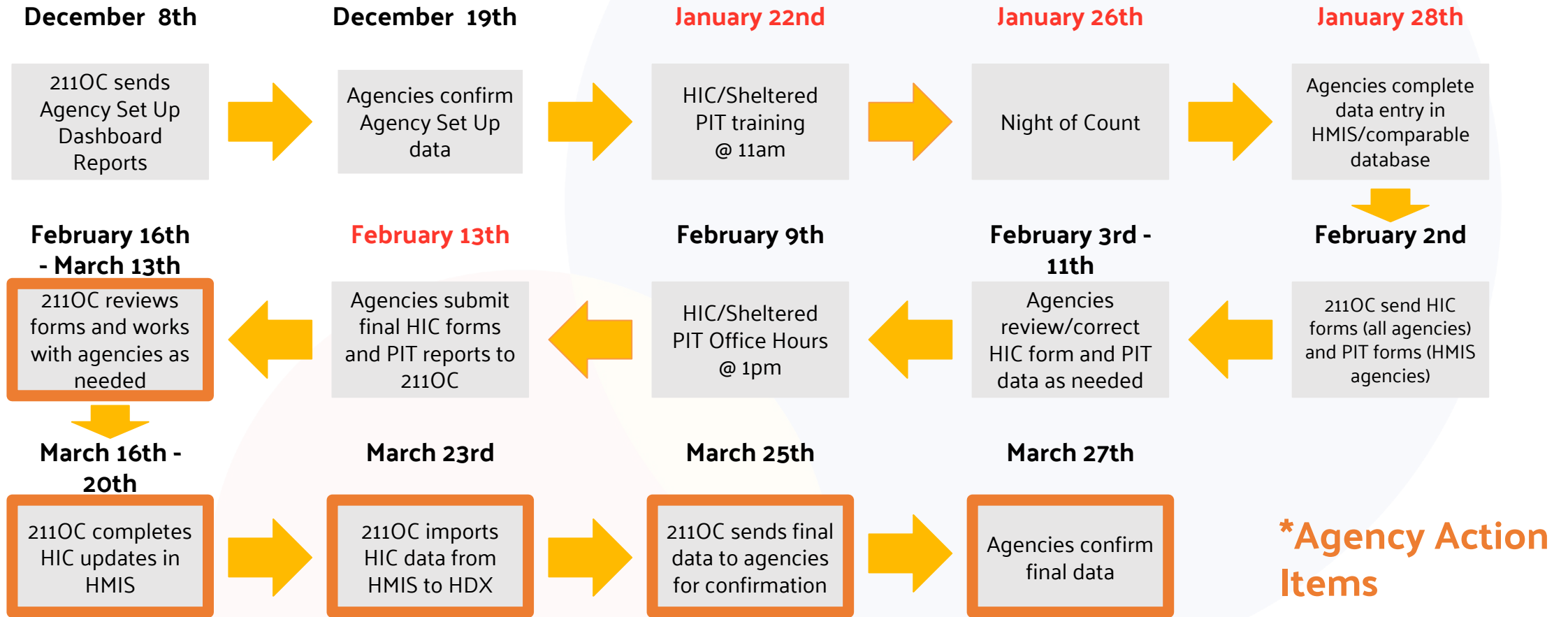
Agencies with any of the following project types, whether or not those projects are in HMIS, are expected to participate in the [HIC/Sheltered PIT](#):

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

## What's Next?

- 211OC reviews forms and works with agencies as needed to verify HIC/Sheltered PIT data accuracy
- 211OC will update Clarity with the HIC/PIT numbers submitted by participating agencies via the HIC/PIT forms that were due Feb 2nd.
- The 211OC team will import the data from HMIS to HUDX and send out the final data for agency confirmation.

# 2026 HIC and Sheltered PIT Timeline



# Reassign the Case Manager

Users who need to provide services to a client at their agency or to one served by a partner agency will need to change the assigned staff to themselves.

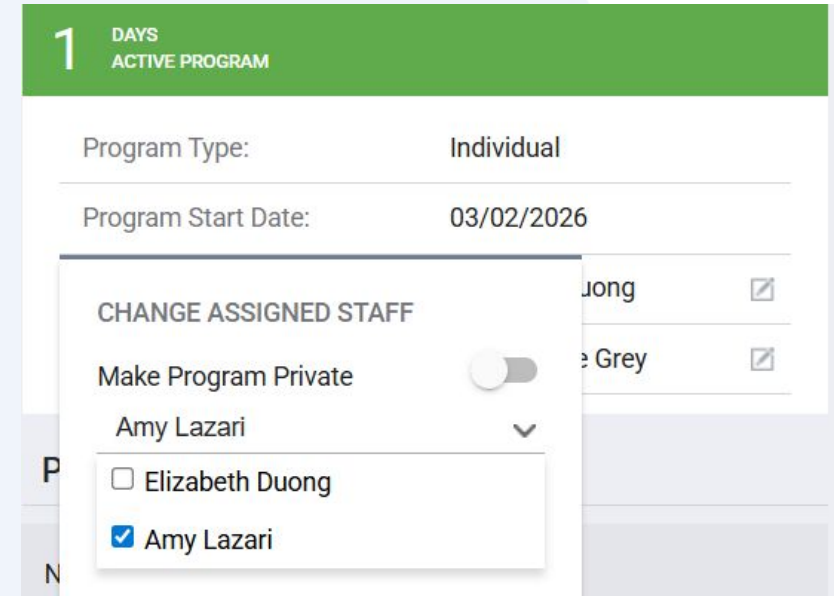
1. Confirm your agency access by navigating to the proper agency using the agency drop-down menu
2. Search for the client's Client Profile record, and select the edit icon
3. Go to the client's Program tab and edit the program by selecting the edit icon next to the enrollment.
4. Locate the Assign Staff section of the program, and click on the edit icon to the right of the name.
5. A drop down menu will appear that has a list of all the active staff at the agency. Choose yourself from among the list, and select Save Changes.

The screenshot shows a software interface for managing a program. At the top, a green header displays '1 DAYS ACTIVE PROGRAM'. Below this, the program details are shown: 'Program Type: Individual' and 'Program Start Date: 03/02/2026'. A dropdown menu is open, titled 'CHANGE ASSIGNED STAFF', and contains a toggle for 'Make Program Private' (which is currently off) and a list of staff members. The list includes 'Elizabeth Duong' and 'Amy Lazari', with 'Amy Lazari' selected and marked with a blue checkmark. In the background, a table lists staff members with edit icons: 'Duong' and 'e Grey'.

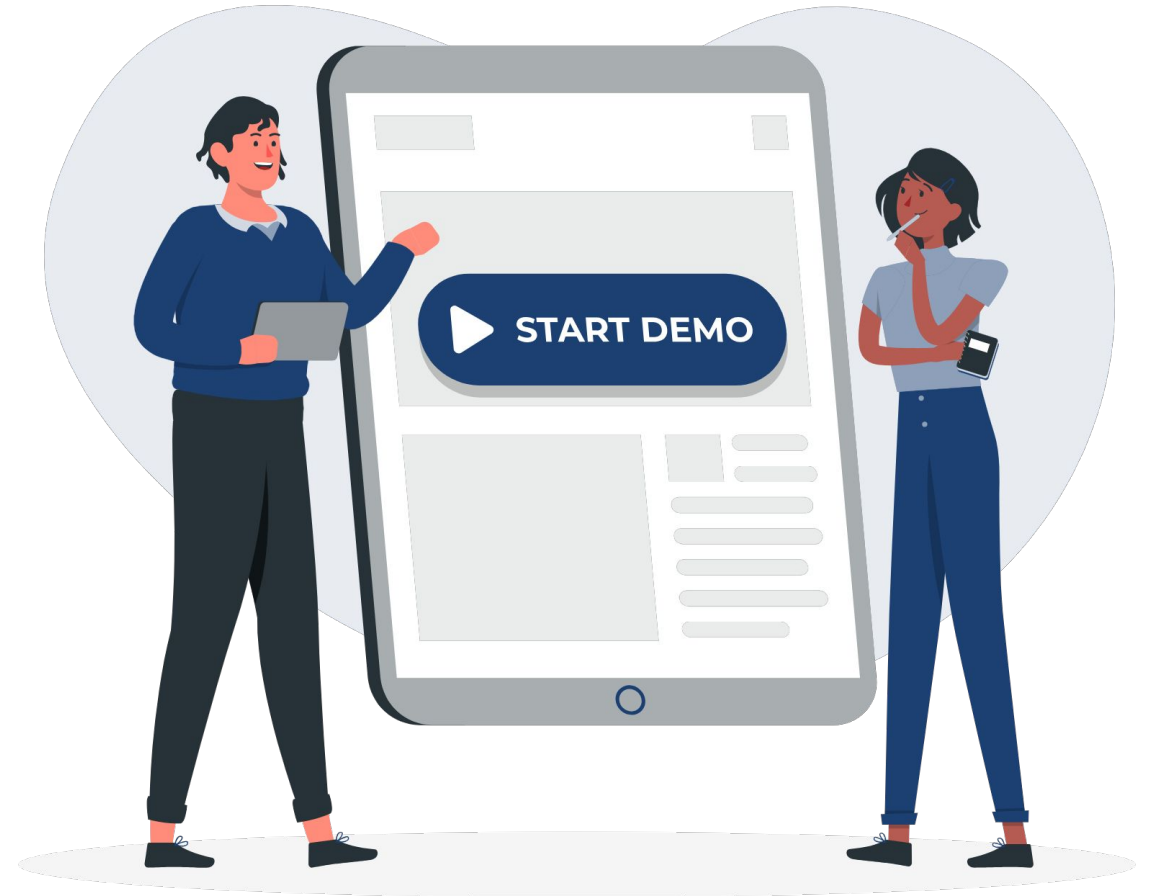
# Reassign the Case Manager

NOTE: Users whose account is transferred over to a partner agency with a change of employment will only be able to see a list of users at that agency. Agency admins will not be able to reassign case managers from one agency to another, case managers themselves must do so.

For more information about this topic, please review our [Reassigning Case Managers](#) KB article



# Reassign the Case Manager Demo



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

# Profile Universal Data Elements

Universal Data Elements (UDEs) are elements that are collected by all projects that participate in HMIS, regardless of funding source. UDEs form the basis of producing unduplicated estimates of local homeless populations.

[UDEs 3.01 - 3.07](#) are considered Universal Identifier Elements (UIEs) and have only one response per client record. These are:

- 3.01 Name
- 3.02 Social Security Number
- 3.03 Date of Birth
- 3.04 Race and Ethnicity
- 3.07 Veteran Status

UIEs follow the same data collection instructions:

**Data Collected About** - All Clients

**Funder: Component** - All Programs

**Project Type** - All Projects

**Collection Point** - Record Creation

KB: [Searching For a Client Record](#) & [Adding Client Profiles to HMIS](#)

CREATE A NEW CLIENT

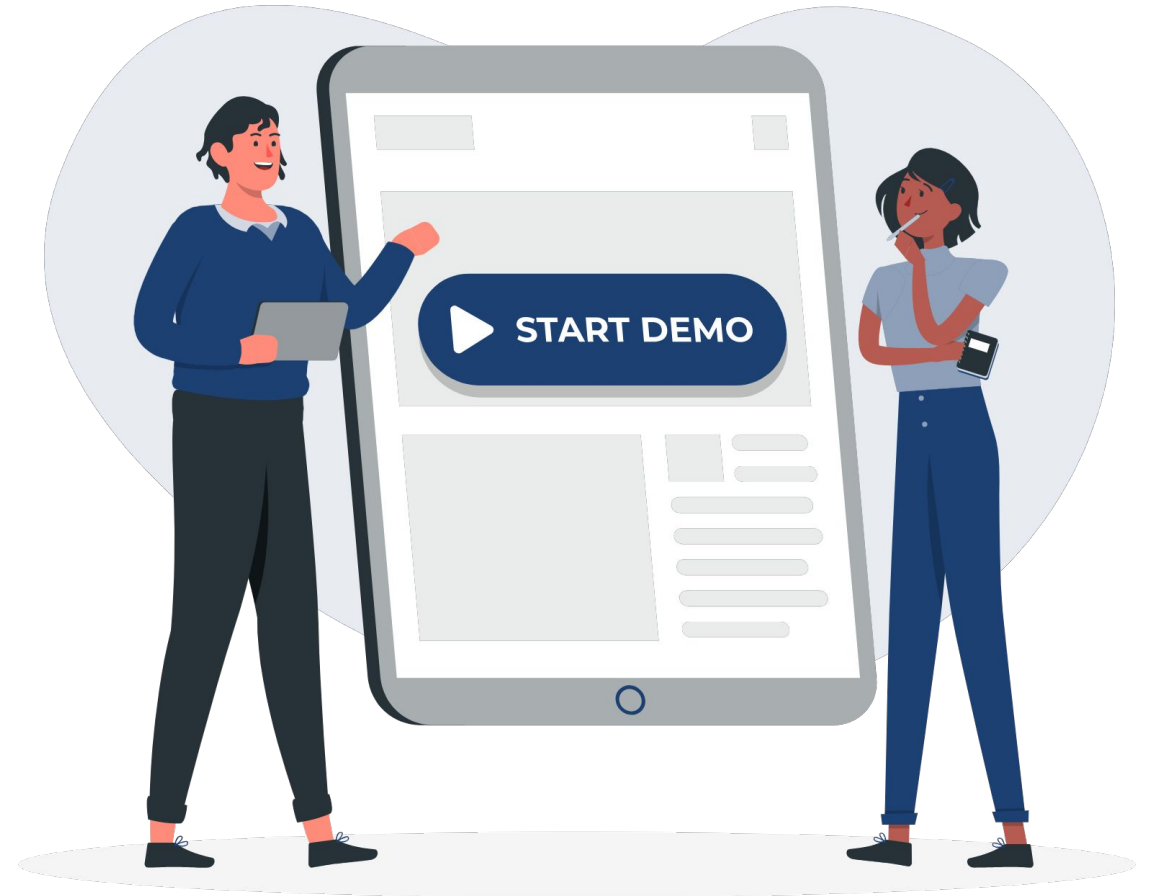
Social Security Number	123 - 45 - 6789	
Quality of SSN	Full SSN Reported	
Last Name	Doe	
First Name	John	
Quality of Name	Full name reported	
Quality of DOB	Approximate or partial DOB reported	
Date of Birth	01/01/2000	Adult. Age: 26
Middle Name	None	
Gender	Select	
Race and Ethnicity	White	
Additional Race and Ethnicity Detail		
Veteran Status	No	

OC CUSTOM QUESTIONS

Alias	
Pronoun(s)	Select
Federally Recognized Tribe	Select
Specify Other Tribe	

Please fill in Release of Information form

# Profile Universal Data Elements Demo



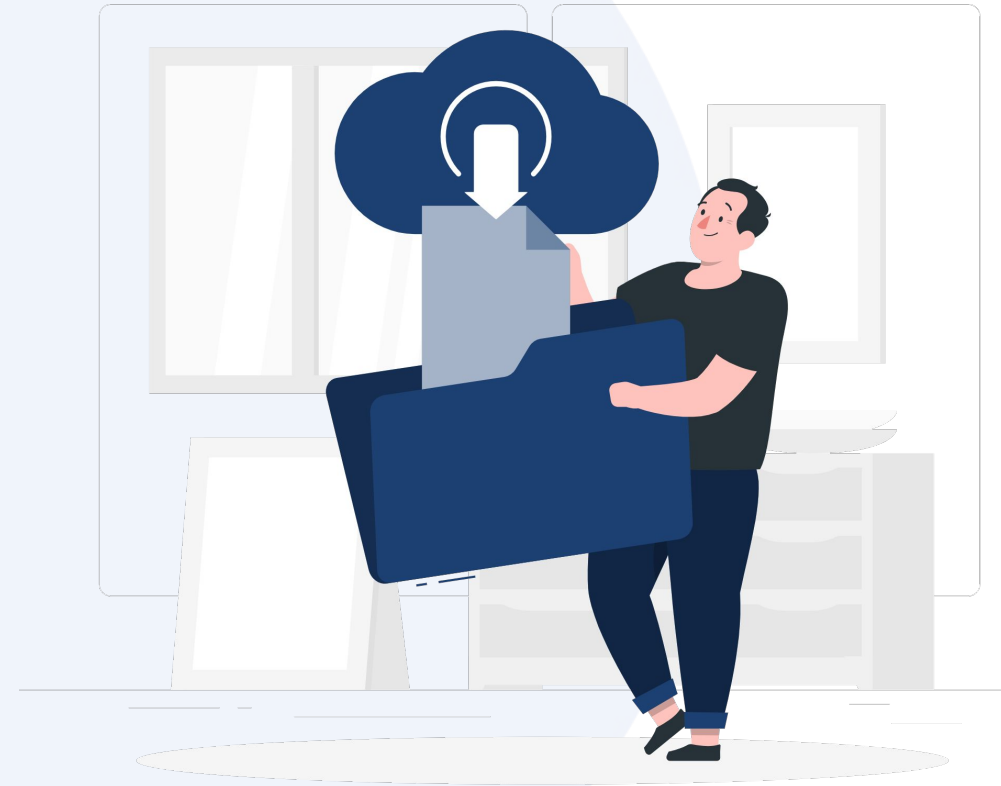
Graphic by: <https://storyset.com/online>

# Client Record Request Overview

During project intake, users should review the record request process with clients as part of the client consent process. Clients who have been enrolled in a project for an extended period of time should be informed of the updated record request process during their annual assessment.

Users must inform clients that the HMIS Helpdesk will only process record requests submitted by partner agency staff. Since 211OC is unable to verify client's identities, the HMIS Helpdesk will not process record requests submitted directly by clients.

The Helpdesk team will be updating the Client Record Request Form to include a question to determine whether a client is submitting the form.



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

# Client Record Request Process Overview

Below is an outline of the record request process:

1. Client informs any HMIS participating HMIS Agency Admin that they are requesting a copy of their HMIS record
2. Agency Admin verify the client's identity
3. Agency Admin and client discuss the scope of the request and method of file delivery
4. Agency Admin submits the record request to the HMIS Helpdesk
5. HMIS Helpdesk processes the record request and uploads files into agency's Dropbox folder
6. Agency Admin meets with the client to review their HMIS record and provides them with the files

For more information about this topic, users can reference our [Client Record Requests](#) KB article.



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

# Sage APR

The updated SAGE APR Guide is available on the HUD Exchange.

- Effective October 1, 2025, the HMIS APR Financial Information form has been revised to enhance clarity and compliance. These updates support HUD's goal of gaining a clearer understanding of HMIS operational costs.

Key enhancements include:

- A redesigned form layout with expanded on-screen guidance
- Added validations to ensure all match funds are accurately reported within HMIS funding sources
- Clarified instructions for reporting in multi-CoC and statewide HMIS implementations
- Please review the updated guide to ensure accurate and complete reporting moving forward.



## CoC APR Guidebook

For APRs submitted in **Sage** on or after October 1, 2025

More information about this topic can be found at the following link: [New Sage APR Guidebook](#)



# HMIS Policies and Procedures Survey

The HMIS team wanted to reach out to the community about feedback you may have about the [Orange County HMIS Policies and Procedures](#).

We are asking the community to review and provide any suggestion on edits to the existing policies. If there is a policy that you think should be changed, please cite the policy in your answer and provide details on why you think it should be changed.

We appreciate the community's feedback and any insights you may have on this topic.

Thank you!

Survey link: [HMIS Policies Review Survey](#)



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

# PPR Goal 5 - Overview

**Goal 5** - Ensure that all available beds are filled as often as possible to reduce the amount of time people experiencing homelessness are unsheltered

- Data collected for Heads of Households in households with adults and children, and all clients in households without children or with only children
- Applicable Project Types & Targets:
  - Emergency Shelter (ES)  $\geq 70\%$
  - Transitional Housing (TH)  $\geq 80\%$
  - Permanent Supportive Housing and Other Permanent Housing (PSH-OPH):  $\geq 95\%$



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

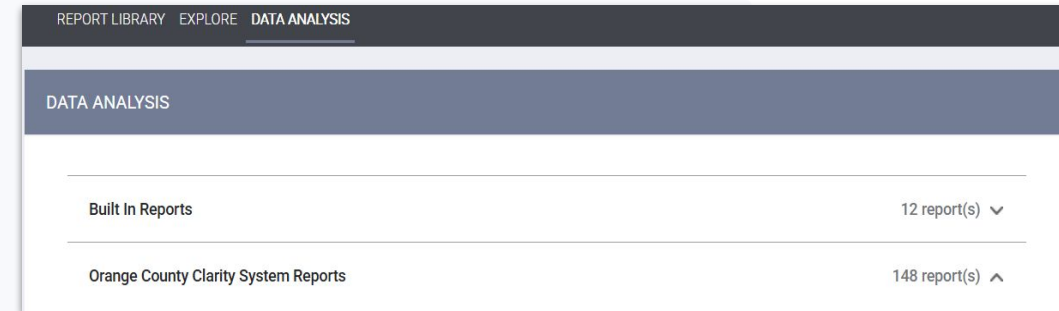
# PPR Goal 5 - Unit Utilization Reports

Agencies can use the following reports in HMIS to calculate Unit Utilization for their projects.

These reports are to be used in unison and briefly processed in Excel to capture the final Unit Utilization percentage.

**To Access:** Data Analysis > Orange County Clarity Reports > Project Performance Reports

- **Unit Utilization - Bed Inventory:** This report shows the total number of beds available during the reporting period.
- **Unit Utilization - Beds/Units Provided:** This report shows the total number of beds provided to clients during the reporting period.



# Unit Utilization Reports

## Unit Utilization - Bed Inventory

Example Reporting Period: 6/1/25-6/30/25

1. Change the "Start Date is before" to the day after the last day of your reporting period.
2. Change the "Date Filter" to the desired reporting period.
3. Select the project type(s) to include in your report from the dropdown list (optional).
4. Select the project name(s) to include in your report (optional).
5. Change the "End Date is on or after" to the first day of your reporting period.
6. Click **Run** and **download the results as a CSV file**.

## Unit Utilization - Bed Inventory

Start Date

is before 2025/07/01

Date Filter

is from 2025/06/01 until 2025/07/01

Project Type Code

is any value

Full Name

is any value

End Date

is on or after 2025/06/01 or is null

# Unit Utilization Reports

## Unit Utilization - Bed/Units Provided:

1. Change the "Reporting Period Filter" using the same reporting period as the *Unit Utilization - Beds/Units Provided* report.
2. Select the project name(s) from the dropdown list (optional).
3. Select the project type(s) from the dropdown list (optional).
4. Click **Run** and **download the results as a CSV file**.

### Unit Utilization - Beds/Units Provided

Reporting Period Filter	Full Name	Project Type Code
is from 2025/06/01 until 2025/07/01	is any value	is any value

# Ensuring Good Data Quality for Goal 5 – Unit Utilization

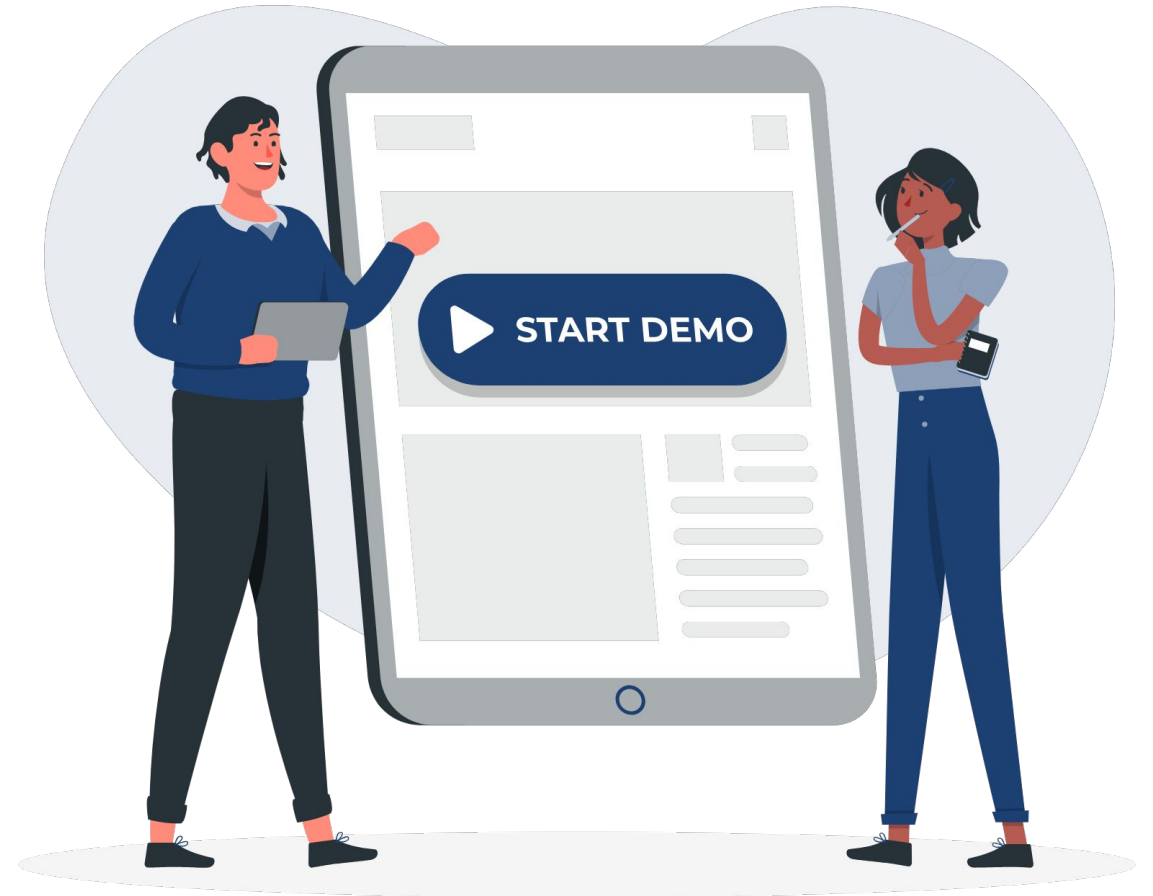
## Verify Your Bed Inventory

- Review your numbers in the **Unit Utilization – Bed Inventory** report.
- Submit a [Request to Update Bed Inventory Form](#) if:
  - The bed/unit counts are wrong
  - Beds/units have changed (opened/closed)
- Keeping this updated ensures your utilization reflects *actual project capacity*.

## Ensure Key HMIS Fields Are Accurate

- Ensure Project Start Date, and Project Exit Date are correct in HMIS.
- Ensure clients are enrolled with the correct household type.
  - Enroll clients of the same household into a Group Enrollment if they are receiving housing/services together.

# Unit Utilization Excel Procedure Demo



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

# Project Performance Report (PPR)

The Homelessness 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 PSH & OPH 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

## OC HMIS Training:

The OC HMIS Team is excited to announce our HMIS Data Element Collection Training. Please join us on Thursday, March 19th via Zoom from 1:00 to 2:30 PM!

Join Zoom Meeting: <https://us02web.zoom.us/j/85806072872>

Meeting ID: 858 0607 2872

## Community Resources:

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

## Additional CES Information:

- [ICES Training Materials](#)
- [FCES Knowledge Base Library](#)



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

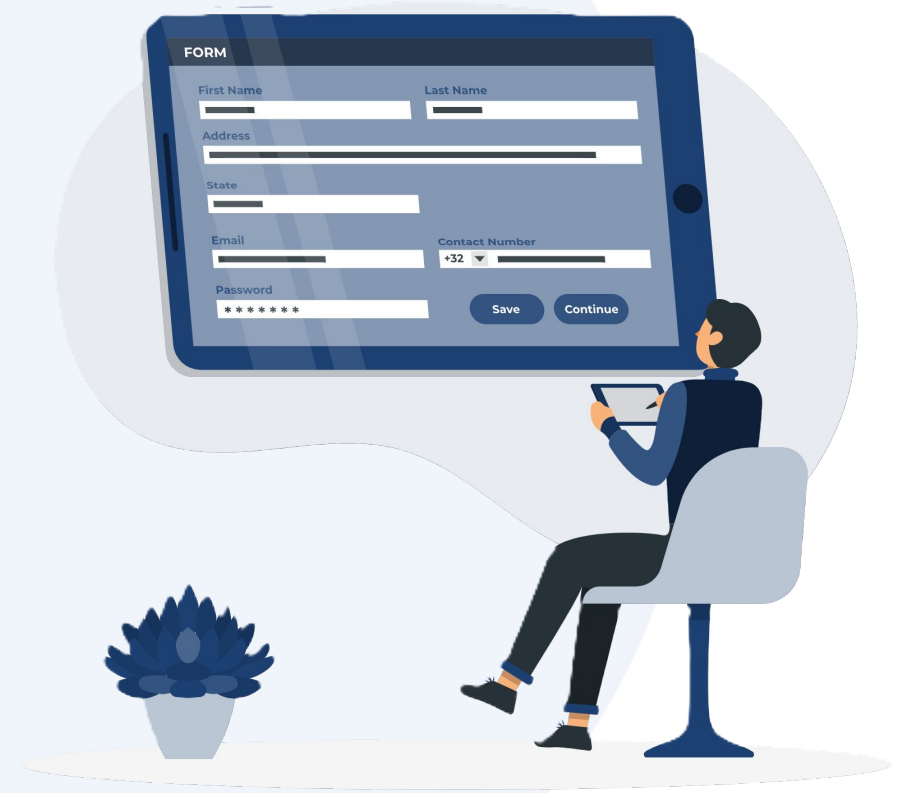
# HMIS User Meeting Survey

Our HMIS Team invites users to complete the HMIS User Meeting Survey. The feedback from the survey is used for topics at our monthly user meetings.

We'd greatly appreciate any topics or ideas you're interested in reviewing in the upcoming monthly meetings.

Thank you!

Survey: <https://forms.gle/JgydgEGsAVsPH6Vo6>



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

# Holiday

The HMIS Team will be out of the office on the upcoming holiday:

**Tuesday, March 31st** in observance of **Cesar Chavez & Dolores Huerta Day**.

We will be back in the office **Wednesday, April 1st** to assist you.



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](#)



**Thank you  
Have a great day!**

**Next User Meeting: April 1st**





Orange County  
**UNITED WAY**