

OC HMIS User Meeting Webinar Minutes
03/04/26

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Agenda Items

HMIS Participating Agencies Schedule

HIC and Sheltered PIT

- Agencies will do a final review and approval of the data by March 27th

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

[HMIS Participating Agencies Schedule](#)

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 1: 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 to Entry Exit ES, Transitional Housing, Safe Haven projects).

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.

Level 2: 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 to Entry Exit and Night by Night ES, Transitional Housing, Safe Haven projects).

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.

Level 3: 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 to Entry Exit and Night by Night ES, Transitional Housing, Safe Haven, PSH, RRH, and OPH projects).

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 and must be corrected.

Exceptions: 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.

Further examples and information can be located on the [HMIS Dual Enrollments and HIC Duplicate Inventory Training Resource](#).

HIC and Sheltered PIT Reminder

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

Beginning March 13th through the 20th the 211OC team will review the forms and work with agencies to update HMIS Clarity with current HIC/PIT numbers;

On March 23rd the OC HMIS team will submit the collected HIC/PIT data to HUDX; subsequently this finalized data will be sent to the agencies beginning

March 25th to confirm everything looks accurate; agencies will confirm their final data on or before Friday, March 27th.

Reassign 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.

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.

Data Element Highlight: 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 data elements 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

For more information about this topic, please reference our [Searching For a Client Record](#) & [Adding Client Profiles to HMIS](#) Knowledge Base articles

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.

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](#) Knowledge Base article.

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.

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

HMIS Policies and Procedure 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/lgydgEGsAVsPH6Vo6>

Project Performance Report - Goal 5 Overview

Goal 5 seeks to ensure that beds are filled as often as possible to reduce the amount of time people experiencing homelessness are unsheltered.

Our target bed utilization varies based on program type:

- 70% utilization in Emergency Shelter projects
- 80% utilization in Transitional Housing projects
- 95% utilization in Permanent Supportive Housing and Other Permanent Housing projects

To calculate Goal 5, run two reports in HMIS and briefly process them in Excel.

Report Pathway: 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.

To Process Reports: Follow the steps in our [Unit Utilization KB Article](#).

To ensure high data quality and accuracy for Goal 5, please monitor your agency's bed inventory and enrollments periodically. Our team recommends running these reports quarterly. Submit a [Request to Update Bed Inventory Form](#) if the bed/unit counts are wrong or beds/units have changed (opened/closed).

Project Performance Report

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.

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](#)

Survey

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Survey: <https://forms.gle/wfAoudZt1ev8fcJB6>

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.

Q&A

Reassigning Case Managers

- Q: How are users supposed to reassign case managers within CES?
 - A: If a staff member is leaving your agency, designate another case manager to take over their clients within HMIS and CES. Have that case manager switch their agency access over to the County of Orange, and instruct them to directly reassign themselves as the case manager for their updated client load. Users should reference the [reassigning case managers](#) KB article for more information.

Data Element Highlight: Profile Universal Data Elements

- Do we pull in these universal data elements for individuals who revoke consent/ROI for HMIS?
 - If this is a new client and they do not yet have a HMIS you can enter in the UDE if they provided it and set the profile to private. If this is a profile that is shared with other agencies then their UDE must be anonymized.
 - This flowchart will provide more guidance on when UDE could be entered for a client profile: [HMIS Client's Record Sharing Decision Pathways](#)
 - Here are some helpful knowledge base articles to review: [Accessing and Completing Release of Information \(ROI\) Page](#) and [Refusing/Revoking Consent to Share Personal Information](#)

HMIS Policies and Procedures

- Q: Where can users locate the current HMIS Policies and Procedures manual?
 - A: Users can locate the HMIS Policies and Procedures manual on [our website](#) by navigating to: [HMIS Forms and Documents](#) > [HMIS Policy and Privacy Forms](#) > [HMIS Policies and Procedures](#)

Project Performance Report - Goal 5

- Q: How often should agency admins run specific project performance reports, such as Goal 5?
 - A: Best practice is to run the report regularly to be aware of your agency's changes and performance outcomes, and add it to your agency's monthly/quarterly data quality review process. At a minimum review the PPR twice a year per the publishing schedule, please reference the [Participating Agencies Schedule](#) to view upcoming PPRs and plan accordingly.

Future Meeting Information

April 2026 HMIS User Meeting Webinar

- Date: Wednesday, April 1st, 2026
- 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.