

**April 2026
OC HMIS User Meeting**

211

Get Connected. Get Help.™



Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Project Update Forms
3. New Staff Onboarding Refresher
4. Anonymizing Clients
5. Assign CES Case Manager
6. Overlapping Enrollment
7. Data Element Highlight: Universal Data Elements
8. LSA Overview
9. PPR Goal Highlight: Goal 6 & 7 Income
10. Project Performance Report
11. Training and Resources
12. Survey
13. Q&A
14. 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	Light Green	Light Green	Light Green	Light Green								
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February	Light Orange	Light Orange				Light Orange	Light Orange	Light Orange				Light 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	Light Green	Light Green	Light Green			Light Green	Light Green	Light Green				
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October		Light Orange	Light Orange	Light Orange				Light Orange	Light Orange	Light 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
HMIS User Recertifications	July	August	n/a	n/a								Pink	Pink				
HMIS Lead Meetings	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	
	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

April

- HIC and Sheltered PIT Finalized for Submission
- Project Performance Reports
 - Rapid Re-Housing
 - Homelessness Prevention
 - Permanent Supportive Housing/Other Permanent Housing
- Data Quality Report Cards

May

- Project Performance Reports
 - Transitional Housing
 - Emergency Shelter
 - Rapid Re-Housing
- Data Quality Report Cards
- Data & Performance Management Meeting

June

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Transitional Housing
- Agency Audits Begin

HMIS Project Update Forms

These forms are used by agencies and projects that are **NOT** already active in HMIS.

It provides an overview of the key HMIS forms used by both new and existing agencies to manage access, maintain accurate project information, and ensure compliance with data standards. New agencies begin by reviewing participation requirements, completing the HMIS Access Application, and submitting required agreements such as the Participating Agency Agreement and Inter-Agency Data Sharing Agreement before proceeding with the New Agency/Program Set-Up Form.

For Agencies/Projects Not Currently Set Up in HMIS:

- [Article: HMIS Requirements for New Agencies](#)
- [Flowchart: Agency Access Application](#)
- [HMIS Access Application](#)
- [New Agency/Program Set-Up Form*](#)
- [Participating Agency Agreement](#)
- [Inter-Agency Data Sharing Agreement](#)



HMIS Project Update Forms

These forms are used by agencies and projects that are already active in HMIS.

Once established in HMIS, agencies use the ongoing forms to manage and update their projects, including requests for funding changes, bed inventory updates, custom fields, supplemental services, and project eligibility criteria, as well as forms for audits, account updates, and incident reporting. Together, these forms support effective system use, data quality, and adherence to privacy and security requirements.

To access these forms, please visit our website: [HMIS Forms and Documents](#)

For Agencies/Projects Currently Set Up in HMIS:

- [Custom Field Request Form](#)
- [Supplemental Services Form](#)
- [Request to Update or Add Funding to Existing Project Form](#)
- [Request to Update Bed Inventory Form](#)
- [Agency/Project Deactivation Form](#)
- [Project Eligibility Requirements Form](#)
- [Data Breach Incident Report](#)

New Staff Onboarding Refresher

New Staff Onboarding Process

Step 1: HMIS Training Courses - New staff will need to create an account & complete the HMIS Training Courses. *Courses are dependent on a user's access role. See New Staff Onboarding KB for more details.*

Step 2: Once training is completed, Agency Administrators (AAs) must verify completion by requesting the staff submit a screenshot of their "My Achievements" tab under My Online Courses to ensure all required courses have been successfully finished.

AAs are responsible for double-checking training completion prior to proceeding. Only after confirming that all required training and HMIS Skill Test has been completed should the HMIS Account and Update Testing form be submitted.

[New Staff Onboarding KB](#)

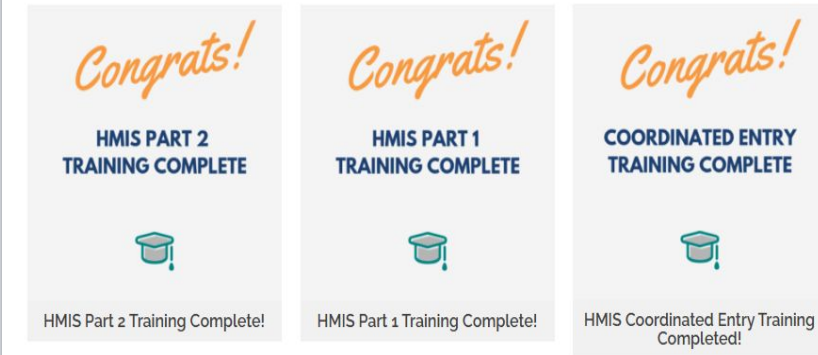
[Enrolling in an OC HMIS Training Course](#)

[OC HMIS Online Training Courses](#)

My Online Courses

[Dashboard](#) • [My Courses](#) • [My Grades](#) • [My Memberships](#) • [My Achievements](#) • [My Certificates](#) • [Notifications](#) • [Edit Account](#) • [Redeem a Voucher](#) • [Order History](#) • [Sign Out](#)

My Achievements



The screenshot displays three achievement cards, each with a graduation cap icon and the text "Congrats!".

- HMIS PART 2 TRAINING COMPLETE**
HMIS Part 2 Training Complete!
- HMIS PART 1 TRAINING COMPLETE**
HMIS Part 1 Training Complete!
- COORDINATED ENTRY TRAINING COMPLETE**
HMIS Coordinated Entry Training Completed!

Anonymizing Clients

If the client has a client record in HMIS:

- Step 1: Upload the signed Client Revocation of Consent Form (with both client and Agency Administrator signatures) to the client's HMIS profile under the correct file category.
- Step 2: Submit a Help Desk ticket with the client's identifier so HMIS staff can anonymize the record.
- Step 3: HMIS staff will remove personal identifiers (name, DOB, SSN), notify active agencies, and services continue under an anonymized record. New agencies must create a private HMIS record for the client.

UPLOAD A FILE

Category	Client Revocation of Consent
Predefined Name	Client Revocation of Consent Form
File	Select File <small>Trouble attaching files? Switch to the Basic Uploader</small>
Private	<input type="checkbox"/>

[ADD RECORD](#) [CANCEL](#)

Setting Client Profile to Private

If the client **does not** have a record in HMIS:

- Step 1: Create a new client profile in HMIS.
- Step 2: Open the Release of Information banner after saving the profile.
- Step 3: Set Permission to No and add the record.
- Step 4: Set the Client Privacy setting to Private (Unless used by different agencies) and save.
 - The client's profile is restricted to your agency only, and you can still enter full client details (name, DOB, SSN).

For reference, please review our KB article:
[Refusing/Revoking Consent to Share Personal Information](#)

RELEASE OF INFORMATION	
Permission	No
Start Date	04/01/2026
End Date	___/___/___
<input type="button" value="SAVE CHANGES"/> <input type="button" value="CANCEL"/>	

PRIVACY	
Client Privacy	Public <input type="checkbox"/> Private <input checked="" type="checkbox"/>
Consent Refused	<input type="checkbox"/>
<input type="button" value="SAVE CHANGES"/> <input type="button" value="CANCEL"/>	

Assigning CES Case Managers

CES case managers are responsible for providing navigation support for clients enrolled in CES projects. While other CES Access Points can support in this work, CES case managers are the ones primarily responsible for supporting the client in care coordination and housing match communication.

Over time, a client's CES case manager may need to be updated to reflect changes navigation support

EXAMPLE:

A Street Outreach (SO) case manager is also a client's assigned CES case manager and the client later enrolls in an Emergency Shelter (ES) project.

WORKFLOW:

The SO and ES teams should work collaboratively to decide whether the CES case manager role should be updated to an ES staff member. If a consensus can't be made, they should reach out to the CES Leads/CES Admin team for additional support.



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

Assigning CES Case Managers

When updates to a client's CES case manager are needed, the case manager taking over the role can do so by completing the following steps:

1. Change your agency access to County of Orange
2. Navigate to the client's *program tab*, and click on the *edit icon* next to the CES project
3. Within the project, navigate to *assigned staff* section and click on the *edit icon*
4. From the drop-down menu, select yourself from the list and then click on the *save changes button*

Users should never assign the CES case manager role to a random staff member on the drop-down menu

In cases where users aren't able to find someone to take over the CES case manager role, they should contact the CES Lead/CES Admin teams for additional support

For more information about this topic, users can reference our [Reassigning Case Managers](#) KB article



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

Overlapping Enrollments

Level 4 Error Overview:

Occur when a household is enrolled in a residential project that uses Move-in Date and Exit Date to indicate occupancy, in order to provide supportive services, but is also enrolled in another residential project that uses Move-in Date and Exit Date to indicate occupancy.

Applicable projects:

- PSH, RRH, or OPH

Any overlap by any number of days is physically impossible and should be fixed 100% of the time.

HUD Exchange: [HMIS Dual Enrollments](#)



Universal Project Stay 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.

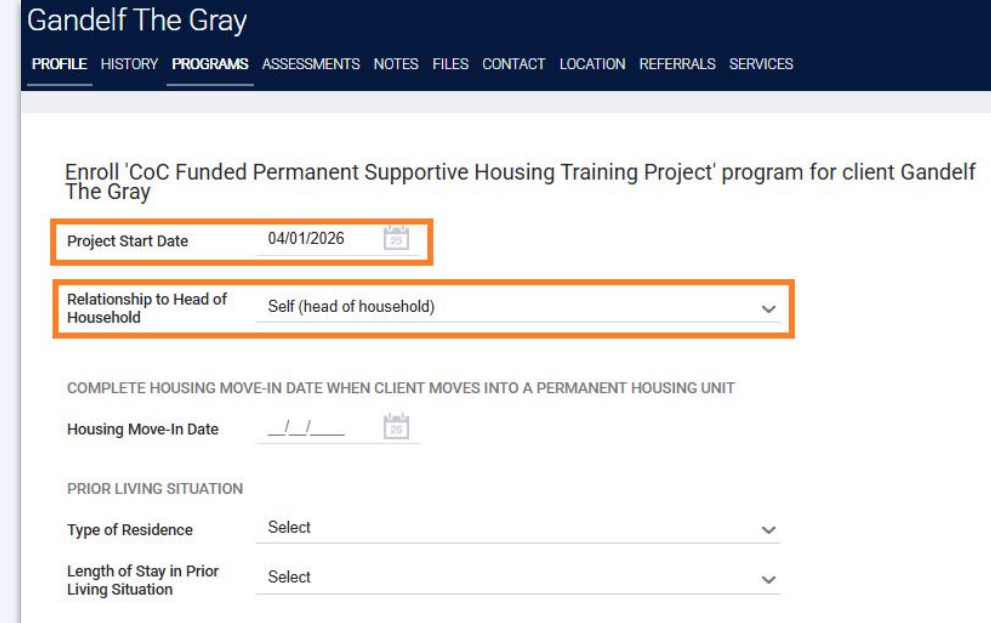
[UDEs 3.10, 3.15](#) are considered Universal Project Stay Elements and may have one more value per client but only one value per enrollment. These include:

- 3.10 Project Start Date
- 3.15 Relationship to Head of Household

UDEs 3.10 and 3.15 follow the same data collection instructions:

Data Collected About - All Clients
Funder: Component - All Programs
Project Type - All Projects
Collection Point - Record Creation

KB: [Project Start Date](#)



The screenshot shows a web interface for enrolling a client named 'Gandelf The Gray' into a 'CoC Funded Permanent Supportive Housing Training Project'. The form includes several fields:

- Project Start Date:** A date field with a calendar icon, currently set to 04/01/2026. This field is highlighted with an orange border.
- Relationship to Head of Household:** A dropdown menu with 'Self (head of household)' selected. This field is also highlighted with an orange border.
- COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT:** A section header.
- Housing Move-In Date:** A date field with a calendar icon, currently empty.
- PRIOR LIVING SITUATION:** A section header.
- Type of Residence:** A dropdown menu with 'Select' chosen.
- Length of Stay in Prior Living Situation:** A dropdown menu with 'Select' chosen.

Universal Project Stay Data Elements

[UDEs 3.20 & 3.917](#) are considered Universal Project Stay Elements and may have one more value per client but one value per enrollment.

- 3.20 Housing Move-In Date
- 3.917 Prior Living Situation

UDE 3.20 and 3.917 data collection instructions:

Data Collected About - All Adult Heads of Household

Funder: Component - All Programs

Project Type - All Projects

Collection Point - Record Creation

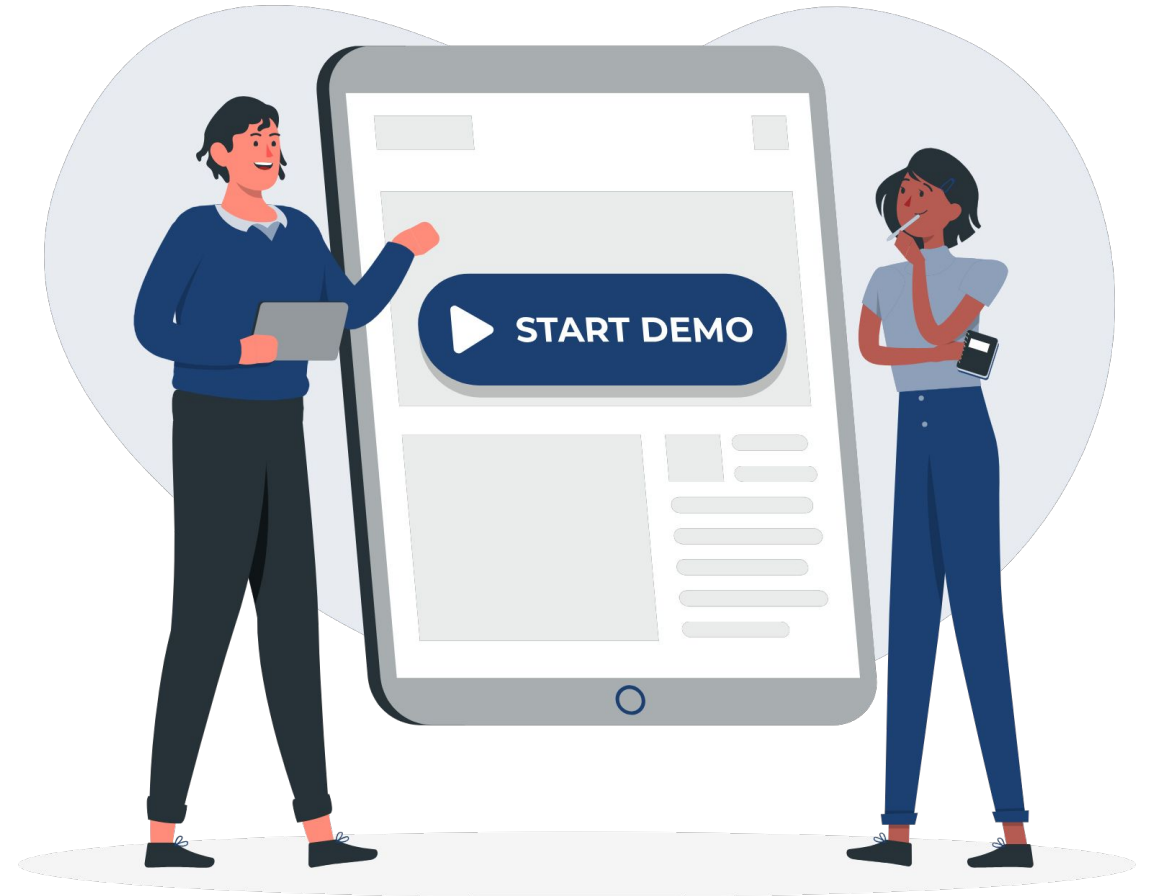
KB: [Housing Move-In Date](#) and [Prior Living Situation 3.917A & 3.917B](#)

The screenshot shows a web interface for a client named 'Gandelf The Gray'. The page has a dark blue header with navigation tabs: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, SERVICES. Below the header, the main content area displays the following information:

- Enroll 'CoC Funded Permanent Supportive Housing Training Project' program for client Gandelf The Gray
- Project Start Date: 04/01/2026 (with a calendar icon)
- Relationship to Head of Household: Self (head of household) (with a dropdown arrow)
- COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT
- Housing Move-In Date: [] [] [] (with a calendar icon)
- PRIOR LIVING SITUATION
- Type of Residence: Select (with a dropdown arrow)
- Length of Stay in Prior Living Situation: Select (with a dropdown arrow)

Orange boxes highlight the 'Housing Move-In Date' field and the 'Type of Residence' and 'Length of Stay in Prior Living Situation' dropdown menus.

Universal Project Stay Data Elements Demo



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

Longitudinal System Analysis (LSA) Overview

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.



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

Report Specifications

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

Current reporting period: 10/1/24 – 9/30/25

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

HMIS Project Types:

Emergency Shelter

Transitional Housing

Permanent Supportive Housing

Rapid Rehousing

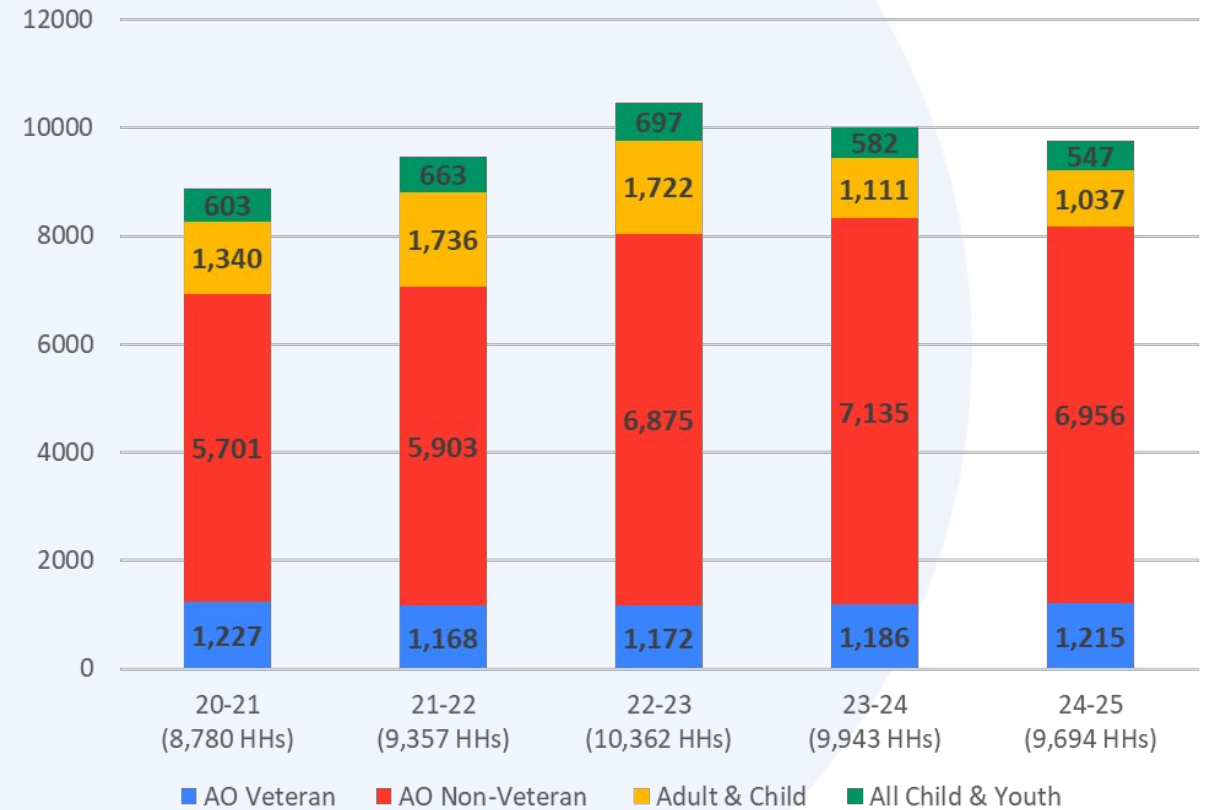
Other Permanent Housing

Overview

The LSA informs how people experiencing homelessness use their system of care

Household Types in this analysis

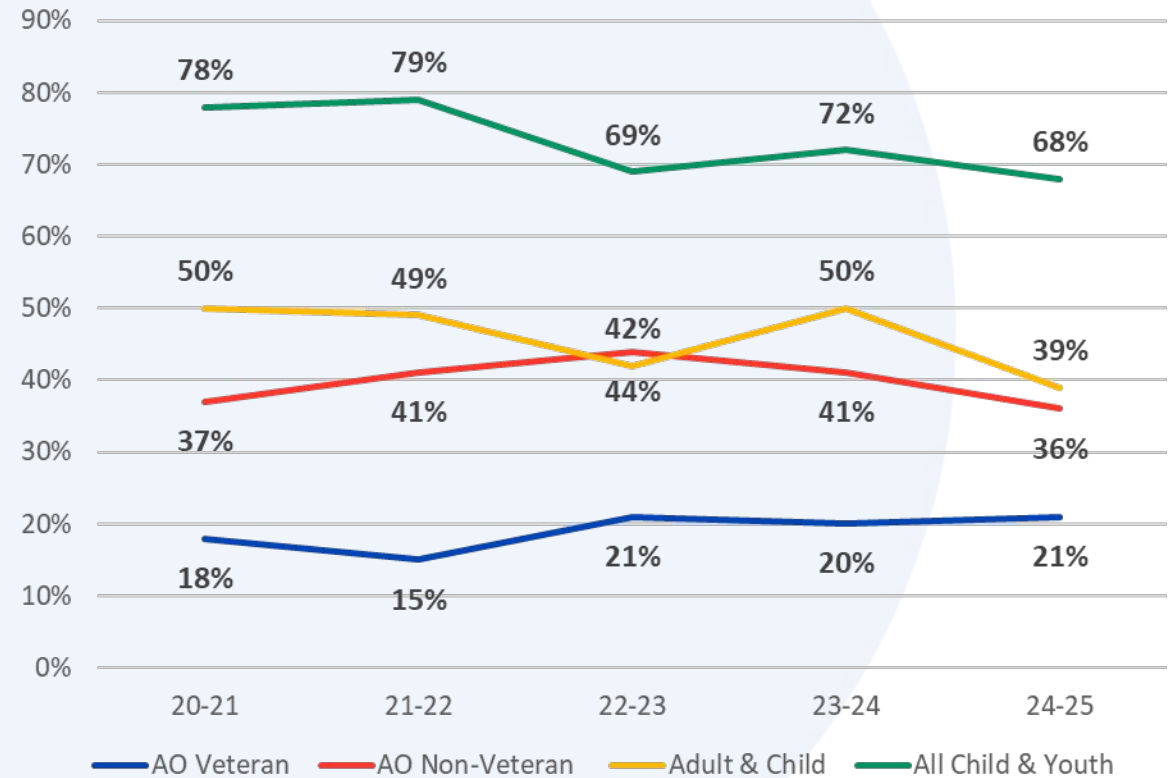
- Adult Only Veteran Households
- Adult Only Non-Veteran Households
- Adult & Child Households
- Child & Youth Households (includes some overlap with other household types)



People Experiencing Homelessness for the First Time

The majority of Child & Youth Households are experiencing homelessness for the first time, suggesting that this population may benefit from diversion strategies

Child & Youth and Adult & Child households are trending down, indicating these populations are becoming more vulnerable over time

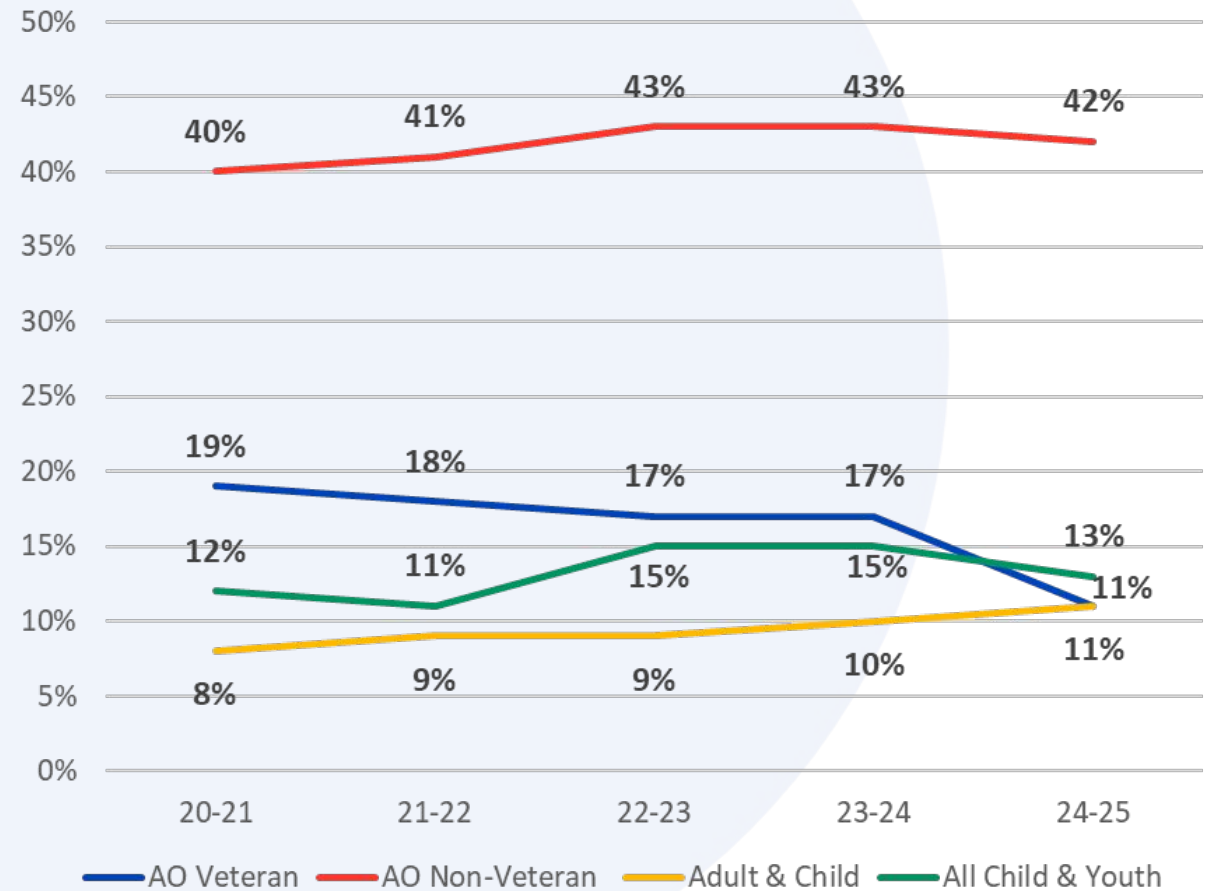


Chronic Homelessness

Adult Only Veteran households that are chronically homeless are trending down, suggesting that those with the highest needs are being placed in appropriate housing

Adult & Child households that are chronically homeless are trending up as a result of less housing opportunities available for this population

Adult Only Non-Veteran households are more likely to be chronically homeless than other household types, and require housing with services

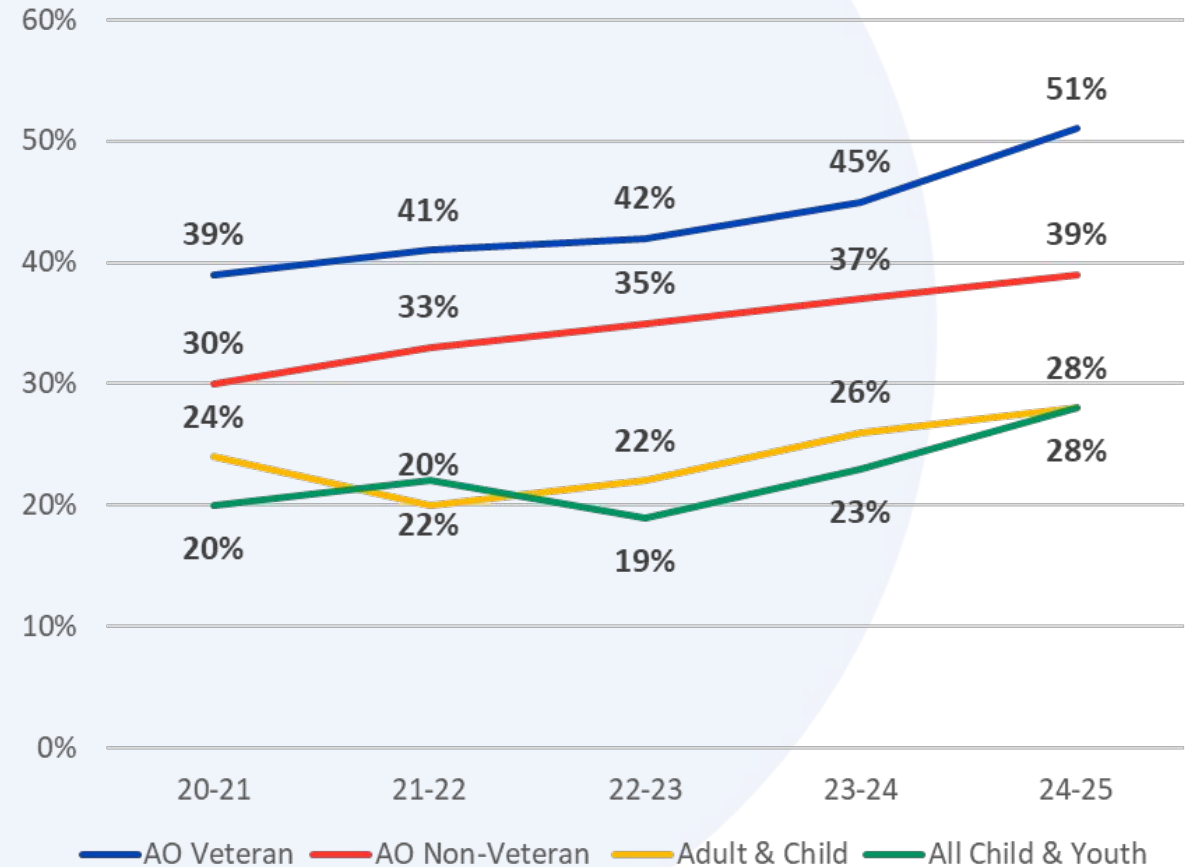


People with Disabilities (not Chronically Homeless)

Adult Only Veteran households report higher rates of disabilities than other populations

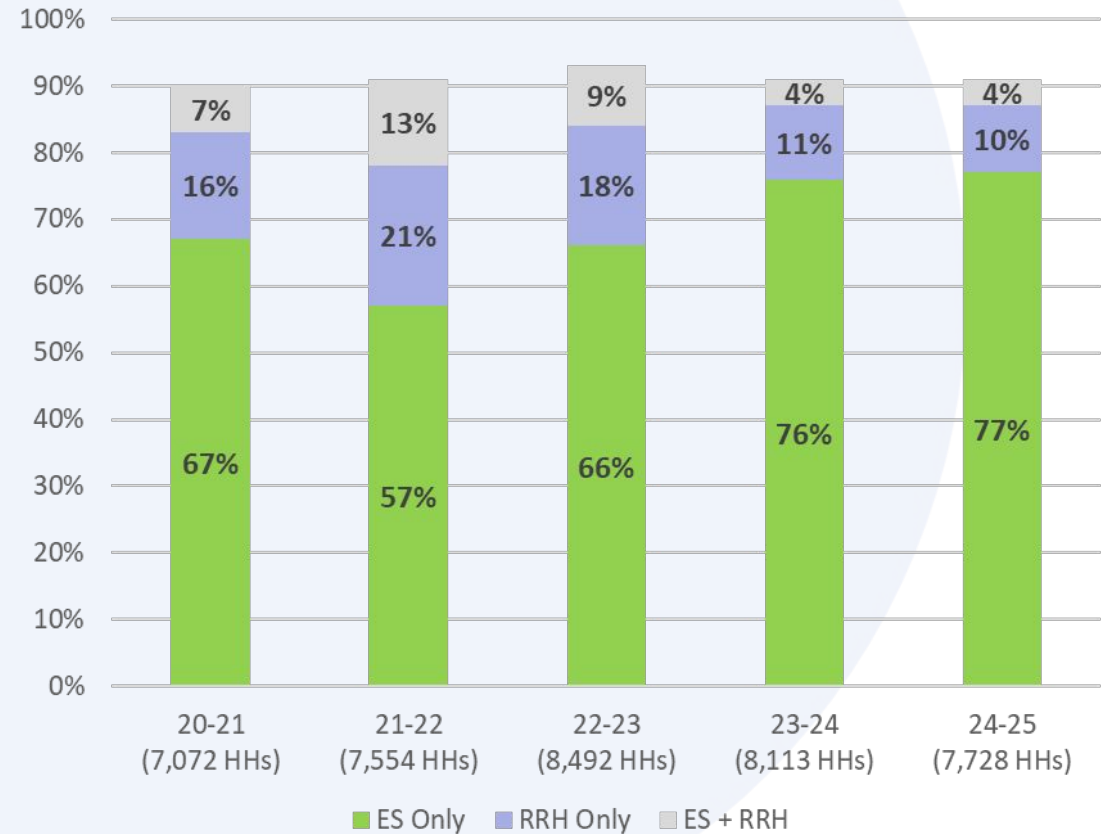
All household types are reporting more disabilities over time, highlighting the need for supportive services for this population

Combining data from the previous slide, 81% of Adult Only Non-Veteran Households and 62% of Adult Only Veteran Households were either Chronically Homeless or Disabled in the past year



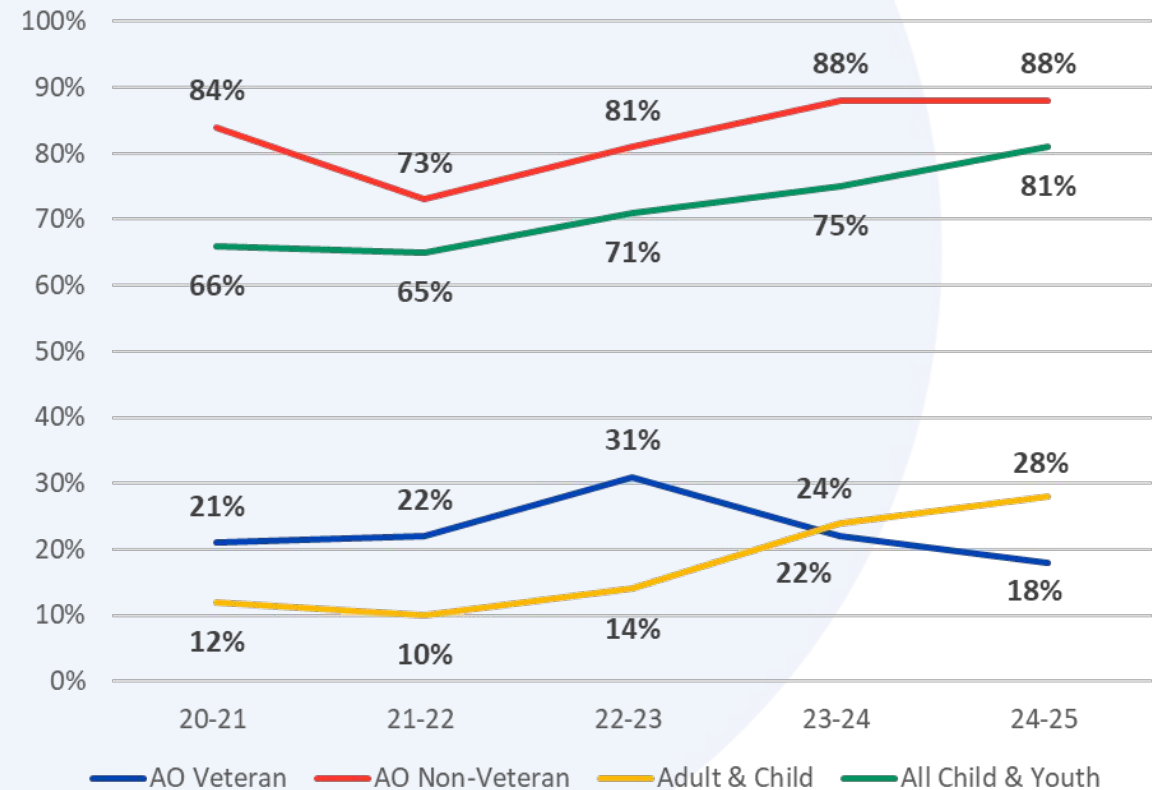
Pathways

- Pathways are the project types that households were served by during the reporting period, and provide information about how households move through the system of care
- Emergency Shelter only and Rapid Re-Housing only are the most common pathways of households served in Orange County
- Percentages on the following slides are the percentage of households in each household type that utilized that pathway



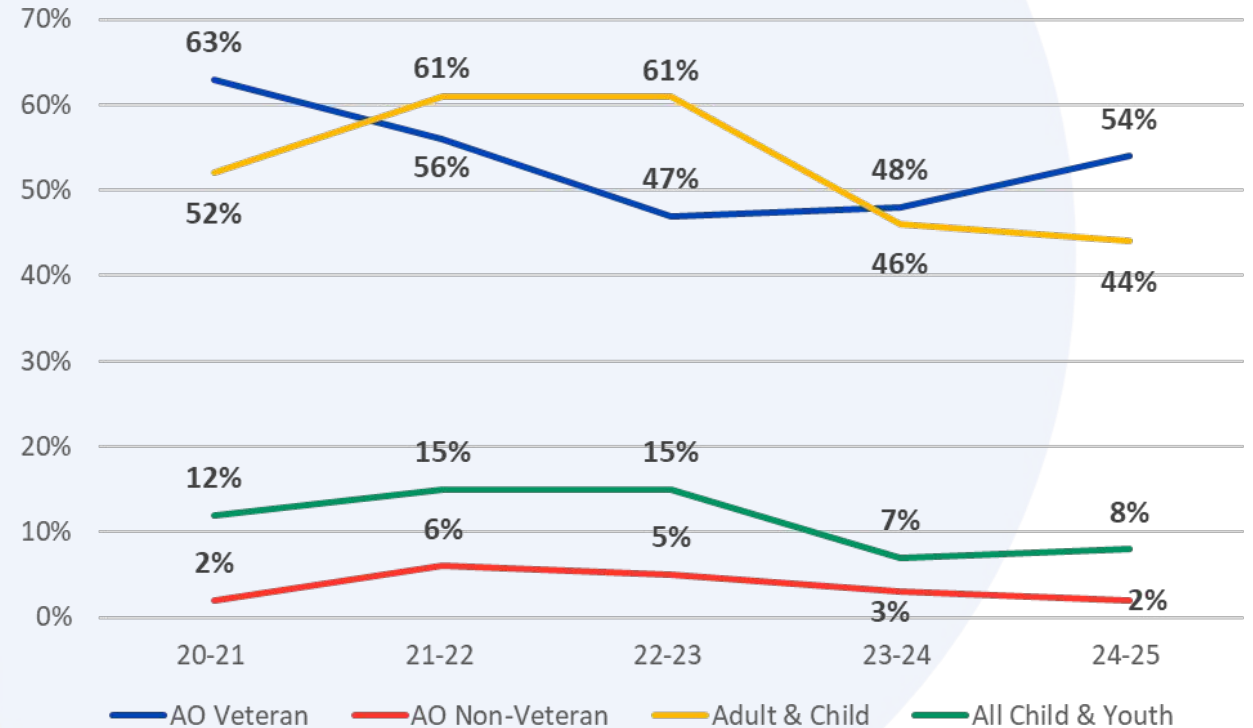
Households Served with Emergency Shelter Only

- Households being served only by Emergency Shelter are increasing for three of the four populations analyzed, Adult Only Non-Veteran Households, Adults & Children Households, and Child & Youth households
- The majority of Adult Only Non-Veteran and Child & Youth households are only served by Emergency Shelter



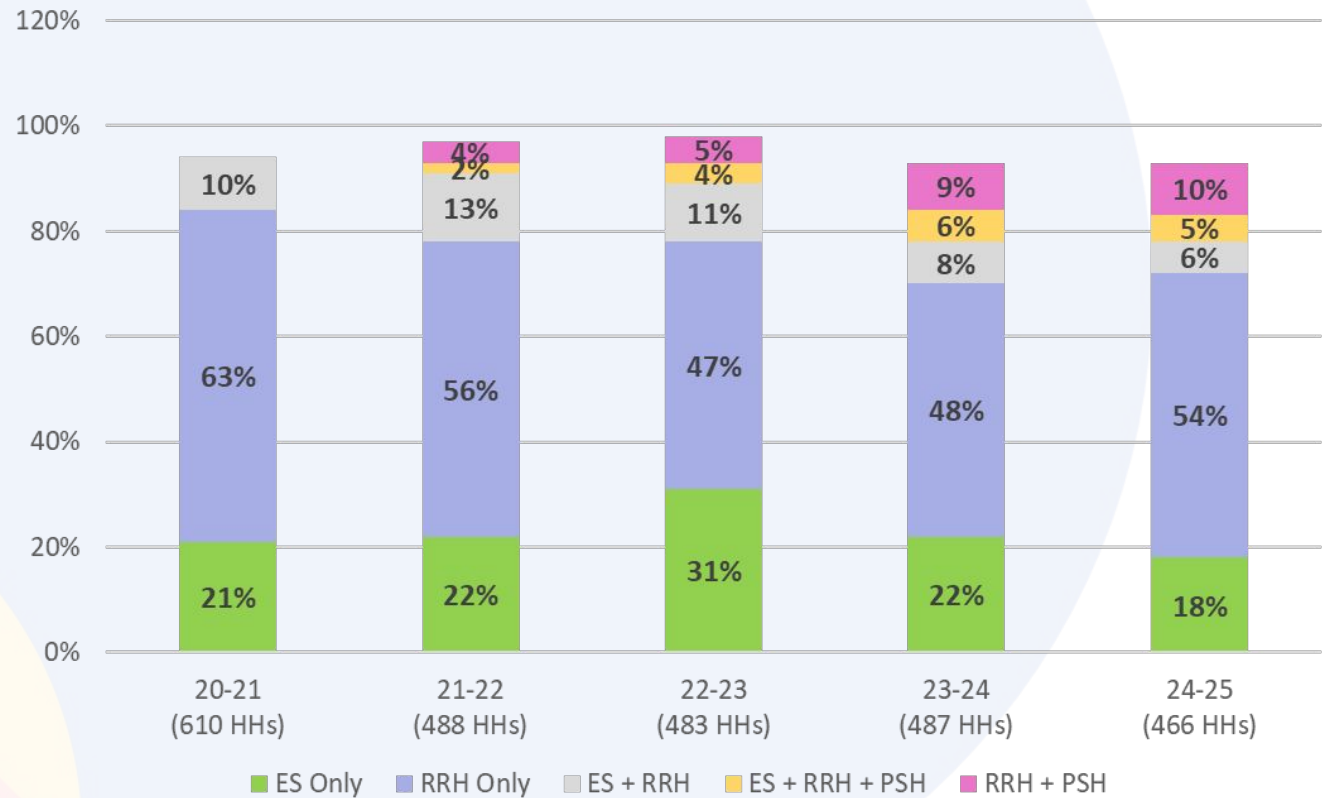
Households Served with Rapid Re-Housing Only

- Households being served only by Rapid Re-Housing are decreasing for all households types
- Adult & Child and Adult Only Veteran households frequently receive services from Rapid Re-Housing projects only



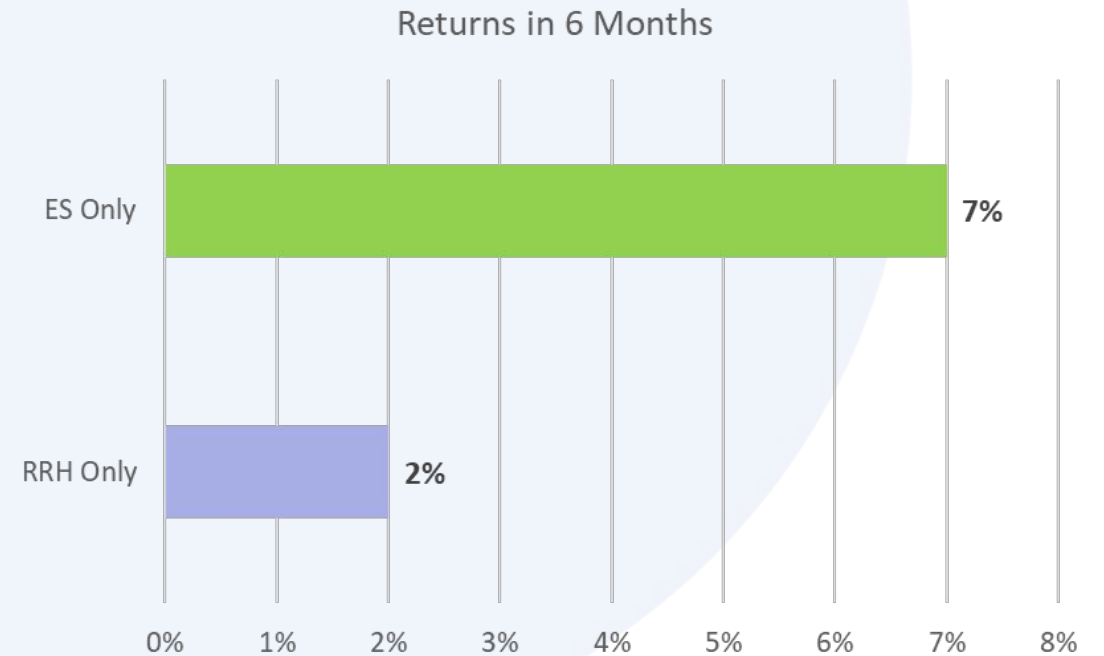
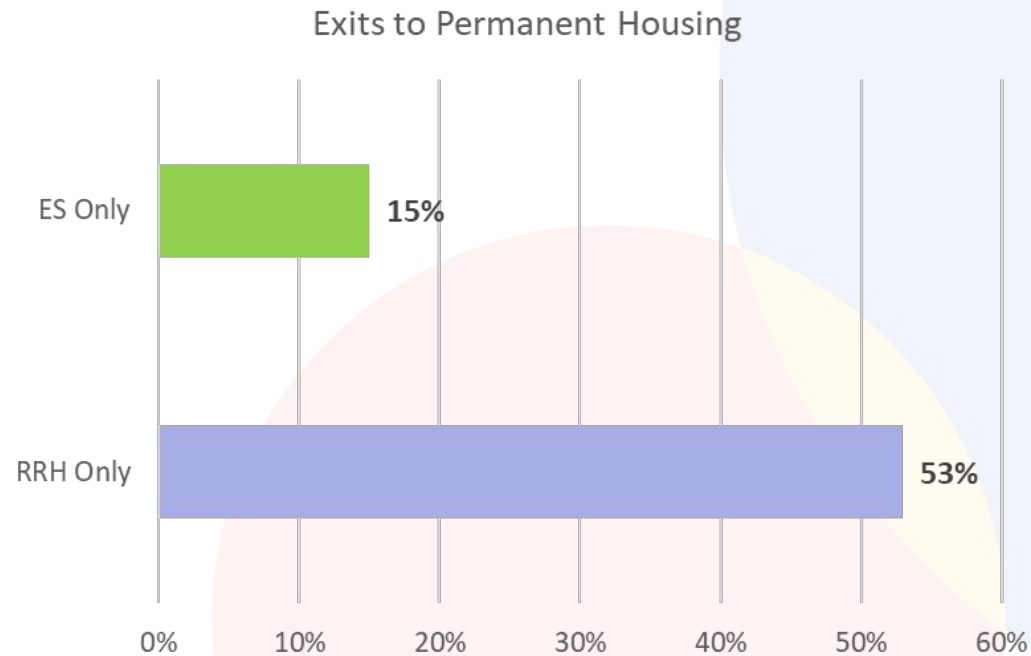
Pathways for Adult Only Veteran Households

- Rapid Re-Housing only is the most common pathway, but this is decreasing over time
- A higher proportion of households are being served from multiple project types, implying increased collaboration between agencies, and more housing opportunities available for this population



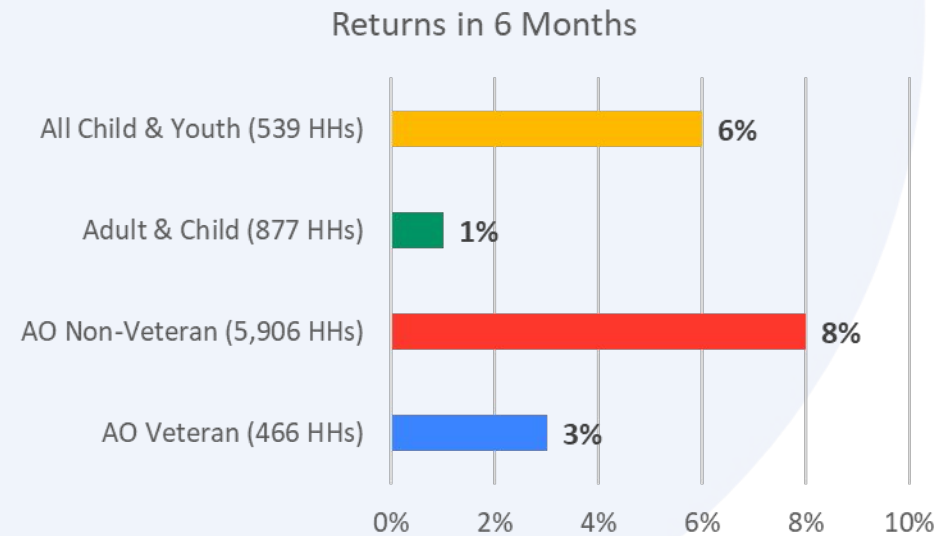
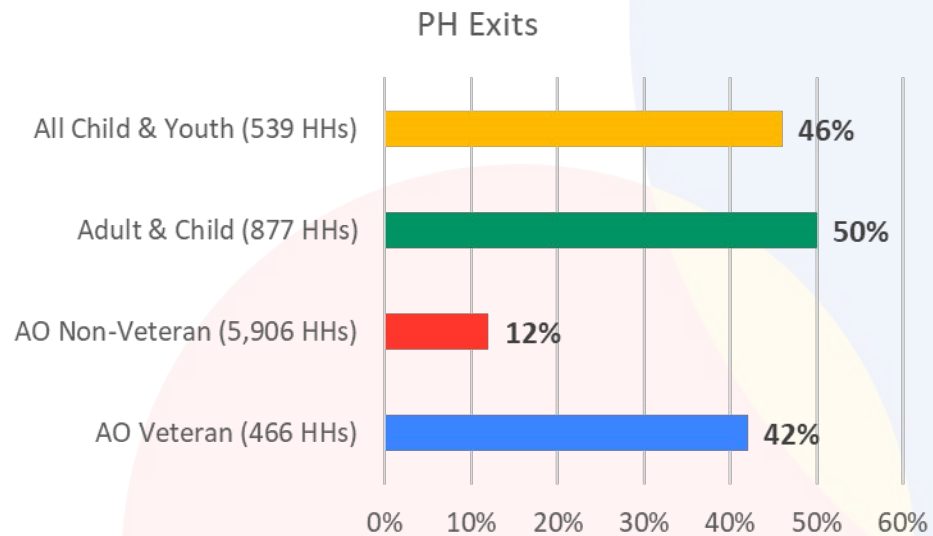
Performance by Pathway

- All household types served with Emergency Shelter only are less likely to exit to Permanent Housing
- Households served with Emergency Shelter only return to the system of care after exiting to permanent housing at higher rates



Performance by Household Type

- Adult Only Veteran households are served more effectively than AO Non-Veteran households despite having similar characteristics
- Adult Only Non-Veteran households are the largest population served in the CoC, and have the worst outcomes



Conclusions

- Diversion resources are needed for Child & Youth households experiencing homelessness for the first time
- Supportive services are needed to support a growing population of people with disabilities
- Increased collaboration and permanent housing opportunities are needed to increase households that are placed in permanent housing
- The current CoC infrastructure to support veteran households may be a good model for Adult Only Non-Veteran households

PPR Goals 6 & 7 (Increased Income) - Earned Income Examples

Earned Income includes: Irregular, part-time, or full-time (as long as the income is current at time of data collection):

- Employment (Official or ‘under the table’)
 - General wages/salary/overtime
 - Tips/commissions/awards
 - Wage increases/bonuses
- Informal income-generating
 - Caregiving (children, adults, & pets)
 - Collecting recyclables (cans/bottles, & scrap metals)

**Please note this is not an exhaustive list.*

Resource: [Project Performance Overview](#)

Goal 6 - Increase in Income - During Enrollment

Applicable Project Types

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing (RRH)
- *Homelessness Prevention (*maintained income)
- Permanent Supportive Housing (PSH)
- Other Permanent Housing (OPH)

Goal 6

- Adults still enrolled
- Has a stay of 365 days +
- Increase in \$ amount of income compared from entry to most recent

Total adult stayers (who had a stay of 365+ days)



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

Goal 7 - Increase in Income - Project Exit

Applicable Project Types

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing (RRH)
- *Homelessness Prevention (*maintained income)
- Permanent Supportive Housing (PSH)
- Other Permanent Housing (OPH)

Goal 7

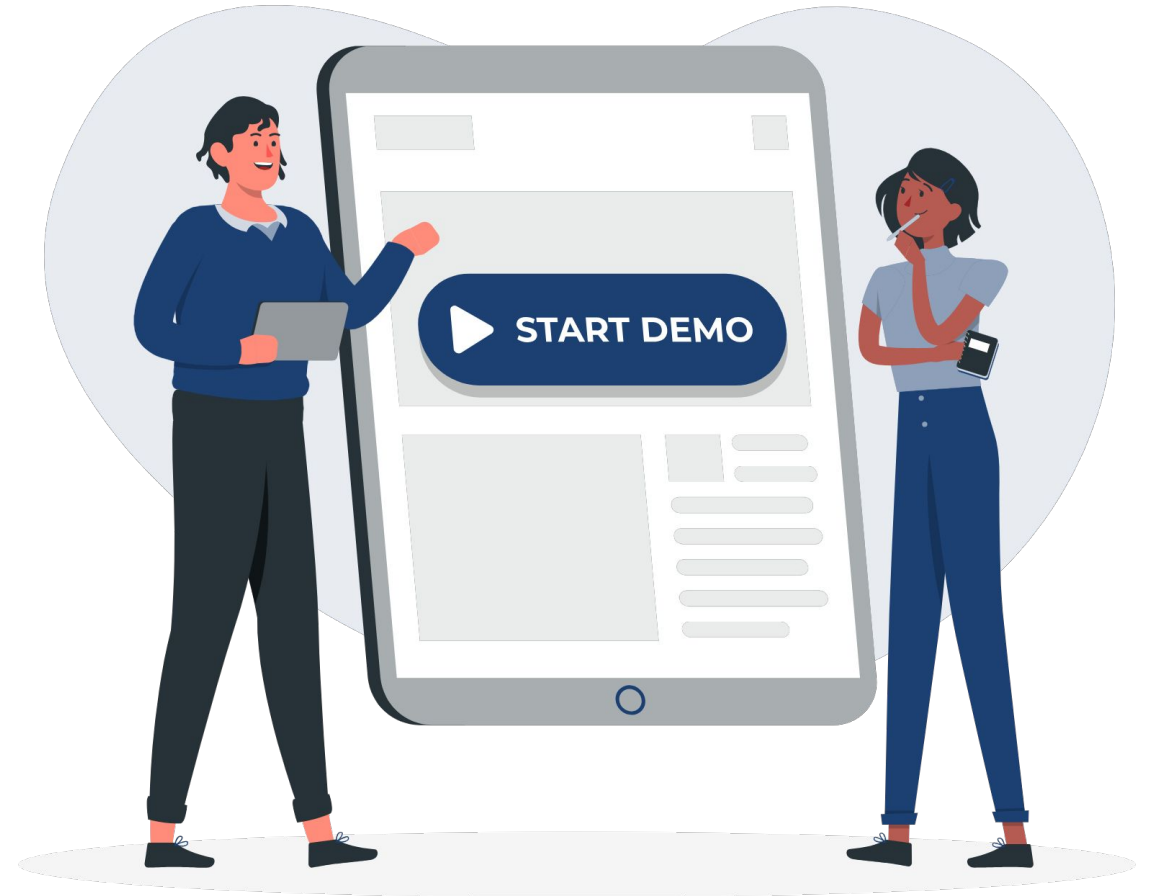
- Adults who exited
- Increase in \$ amount of income compared from entry to exit

Total adult leavers



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

PPR Goal 6-7 Details Report - Demo



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

Project Performance Report (PPR)

The Permanent Supportive Housing (PSH) and Other Permanent Housing (OPH) PPRs will be published on our website 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 RRH PPR (Rapid Rehousing) 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

The OC HMIS Team is excited to announce our HMIS Agency Administrator Training. Please join us on Thursday, April 30th via Zoom from 1:00 to 2:30 PM!

Join Zoom Meeting: <https://us02web.zoom.us/j/83006846760>

Meeting ID: 830 0684 6760

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>

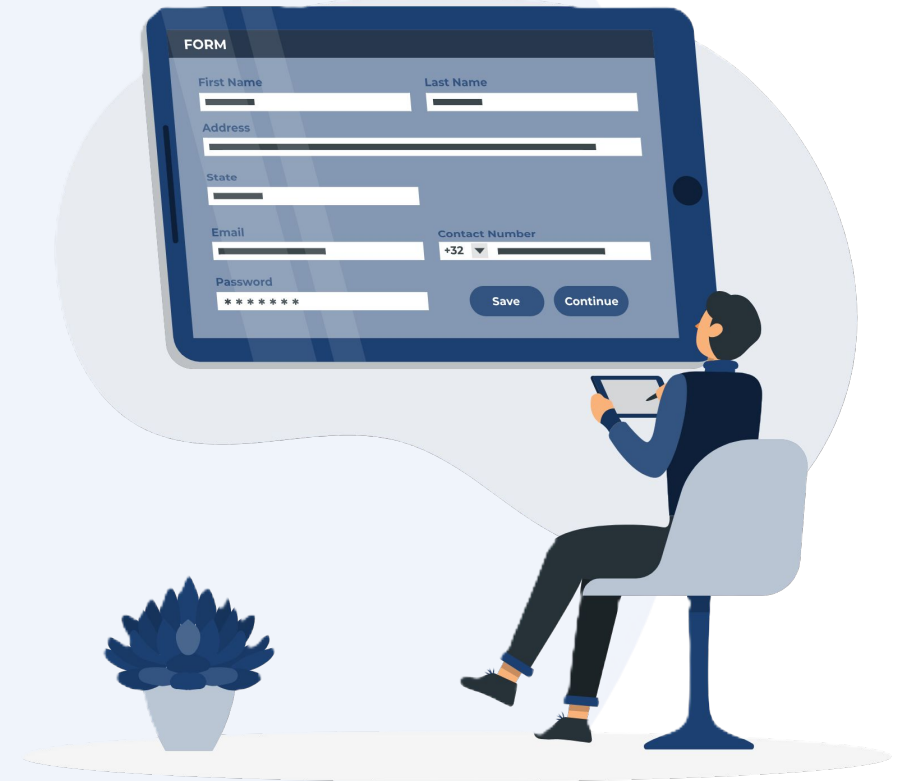
HMIS User Meeting Survey

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/8VfCUtu9Wt4pmem17>



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: May 6th





Orange County
UNITED WAY