

OC HMIS User Meeting Webinar Minutes  
04/01/26

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**Agenda Items**

***HMIS Participating Agencies Schedule***

HIC and Sheltered PIT

- Finalized for submission

PPR Corrections

- Rapid Rehousing 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 03/01/2024 - 2/28/2026
  - 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](#)

***HMIS Project Update Forms***

Agency Admins are encouraged to use the update forms to provide the HMIS Team information to streamline

changes to your program's operations.

Agencies and projects that are NOT already active in HMIS, will navigate through this pathway: [ochmis.org](http://ochmis.org) > HMIS Forms and Documents> HMIS Data & Set Up Forms> [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](#)

If your agency already participates in HMIS and needs to add an additional project to HMIS, use the New Agency/Program Set-Up Form and select "Yes" for "Is your agency already participating in the Orange County HMIS?"

Agencies and projects that are already active in HMIS, will navigate through this pathway: [ochmis.org](http://ochmis.org) > HMIS Forms and Documents> HMIS Data & Set Up Forms> [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***

Agencies setting up new users should review the [New Staff Onboarding KB](#) to determine the appropriate training the user needs for their job responsibilities.

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.\*
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.

### ***Anonymizing Clients***

There may be cases when a client requests to revoke their consent to share their personal identifying information. There are different pathways depending on the stage of data collection, whether the client already has an existing

HMIS record or this is their first interaction with the homeless system of care. Please review the [HMIS Client's Record Sharing Decision Pathways](#) for additional information.

#### **If the client has a client record in HMIS:**

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.
2. Submit a Help Desk ticket with the client's identifier so HMIS staff can anonymize the record.
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.

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

1. Create a new client profile in HMIS.
2. Open the Release of Information banner after saving the profile.
3. Set Permission to No and add the record.
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](#)

### ***Assign CES Case Manager***

CES case managers are responsible for providing navigation support for clients enrolled in CES projects. While other CES Access Points can support 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.

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.

### ***Overlapping Enrollments***

Level 4 Overlapping Enrollment Errors 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 are Permanent Supportive Housing, Other Permanent Housing, and Rapid Rehousing. Any overlap by any number of days is physically impossible and should be fixed 100% of the time.

Review [HUD Exchange: HMIS Dual Enrollments Training Resource](#) for further guidance.

### ***Data Element Highlight: Universal Project Stay Data Elements***

UDEs 3.10, 3.15, 3.20, 3.917 are considered Universal Project Stay Elements and may have one more value per client but only one value per enrollment.

- [3.10 Project Start Date](#) (All Clients)
- 3.15 Relationship to Head of Household (All Clients)
- [3.20 Housing Move-In Date](#) (Heads of Household)
- 3.917 Prior Living Situation (All Adults and Heads of Households)
  - [Prior Living Situation 3.917A](#)
  - [Prior Living Situation 3.917B](#)

For more information about these Universal Project Stay Elements, navigate to the [HMIS Data Standards Manual](#).

### ***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.

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

Summary of FY24-25 LSA:

- 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.

***Program Performance Report: Goal 6 & 7 Income***

Both Goal 6 and 7 are measures reviewing changes in income at different stages of the clients participating in the homeless system of care.

**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:** Goal 6 is calculated using the following:

**Numerator:** Adults who are enrolled, have a stay of 365 days or more, and increase the dollar amount of income (compared from entry to most recent record.)

**Denominator:** Total adult stayers who had a stay of 365 days or more.

Applicable Project Types

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

\*For Homelessness Prevention project enrollments maintained and increased income counts as positive contributions for this measure.

**Goal 7 - Increase in Income - Project Exit:** Goal 7 is calculated using the following:

**Numerator:** Adults who exited and increased their dollar amount for income (compared from entry to exit)

**Denominator:** Total adult leavers.

Applicable Project Types

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

\*For Homelessness Prevention project enrollments maintained and increased income counts as positive contributions for this measure.

### ***Project Performance Report***

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 (or have been) 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***

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](#)

### ***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>

## Q&A

### Project Performance Reports

- Q: What are the PPR reporting periods?
  - A: The PPR reporting period and publishing timelines are available in the [Project Performance Report Overview](#) document on the [PPR page of our website](#).

### Universal Data Elements (UDEs)

- Q: Is information related to UDEs retained when a client is exited from one project and then enrolled into another?
  - A: The *Cascading Data* feature in HMIS should retain the most recent enrollment data and UDEs. If this functionality is not working for your agency, please submit a ticket to the OC HMIS Helpdesk for our team to investigate further.

### Reassigning CES Case Managers

- Q: Should clients be exited from CES after exiting from our agency's project?
  - A: Although clients may no longer be receiving support from your agency, users should coordinate with the CES Lead/Admin teams, as well as other agencies currently working with the client, to conduct a warm handoff of supportive services etc. Users shouldn't default to exiting a client from CES without first conducting a review.

## Future Meeting Information

### May 2026 HMIS User Meeting Webinar

- Date: Wednesday, May 6th, 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.