

OC HMIS User Meeting Webinar Minutes
06/03/26

Contents

Agenda Items	1
HMIS Participating Agencies Schedule	1
Agency Audits	1
Data Element Highlight: Monthly Income and Sources	2
Additional Agency Access	2
Duplicate Client Profiles	3
Behavioral Health Services Act (BHSA) Compliance	3
Project Performance Report - Goal 10 Overview	4
Project Performance Report	5
Emergency Transfer Plan Reporting	5
Training and Resources	6
CES - City Prior and Current Living Situation	6
Survey	7
Q&A	7
Future Meeting Information	7
July 2026 HMIS User Meeting Webinar	7

Agenda Items

HMIS Participating Agencies Schedule

PPR Corrections

- Emergency Shelter Goal 10 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 05/01/2024 - 4/30/2026
 - 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](#)

Agency Audits

The HMIS Helpdesk Team will begin conducting agency audits for 2026 this month.

- We will reach out to your agency 3 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.

- Please be on the lookout for our email to schedule your Agency Audit in June. We will be scheduling audits throughout the summer and fall months to accommodate all the agencies.

Data Element Highlight: Monthly Income and Sources

4.02 Income and Sources

This Data Element is collected to determine whether households are accessing all income sources for which they are eligible and to allow for analyzing any changes to income between project start and exit.

For more information please refer to the following knowledge base article, [Income and Sources](#)

Common Errors:

- Confusion between SSI, SSDI and Retirement Income from Social Security
 - Supplemental Security Income (SSI) disability benefits are only available to low-income individuals who have either never worked or who haven't earned enough work credits to qualify for SSDI.
 - Social Security Disability Insurance (SSDI) is available to workers who have worked and accumulated a sufficient number of work credits but they are unable to work due to a medical condition.
 - Retirement Income from Social Security is available to workers, employers and the self-employed who pay for the benefits with their Social Security taxes from their working income.
- General Assistance listed as Other income
 - General Assistance (also called General Relief) is a cash assistance program funded by the County of Orange. It provides temporary cash aid to eligible adult lawful residents who do not have custody of any minor children and do not qualify for Federal or State funded cash aid programs. Use the General Assistance field to report General Assistance or General Relief.
- No income entered as Other income \$0
 - Other Income is only for sources of income not listed. If the client has no income, use the "No" response for the field Income from any source. Do not use this field to indicate the client has no income (placing \$0 in the field).

Additional Agency Access

When users are given access to HMIS, they are set-up with a Primary Agency affiliation that identifies them as staff employed by that agency.

In some cases users need access to projects at agencies that are different from their Primary Agency (access to CES, or users at agencies that are sub-recipients of grants managed by another agency).

To be given access to an additional agency, the agency that manages the project the user needs access to must submit the [HMIS Account Update & Testing Form](#) to request access for that user.

Before CES access can be requested the user MUST complete the CES module from the [HMIS Training Courses site](#).

The Agency Administrator at the staff's agency must submit the [HMIS Account Update & Testing Form](#) to request

the County of Orange additional agency access.

Once the user's account has been updated with additional agency access, the additional agency will appear under their agency dropdown in Clarity.

When the user first logs in the dropdown will default to their Primary Agency. To enter data or run reports under the additional agency, the user must select the agency dropdown and click on the agency view.

Further guidance about requesting and utilizing Additional Agency Access is available from the [Additional Agency Access Knowledge Base Article](#).

Duplicate Client Profiles

Users are advised to [search HMIS](#) to verify if there's already an existing profile for the client before creating a new HMIS record to avoid a client ending up with multiple records.

If a duplicate profile is discovered the Agency Administrator should submit a [Help Desk ticket](#) requesting a Client Record Merge; please identify the primary and duplicate profiles with the client Unique ID; Do not disclose any PPI such as the last four of the SSN or DOBs.

Before reaching out to the Help Desk with a de-duplication request, Agency Admins must confirm the records represent the same individual by completing one or more of the following steps:

- Review and compare profile screen identifying information.
- Review identifying documentation available in both records.
- Reach out to other agencies/staff working with the client and confirm records match the same individual.

A process to help reduce duplicate HMIS records is to run the Duplicate Clients Report [DQXX-110] which generates a list of potential duplicate client records. Agency Administrators are encouraged to run this report on a quarterly basis.

The system looks at the following fields to determine if the records are an exact match:

- Personal Identifying Information (PII) fields such as Name, Social Security Number, Date of Birth
- Data Quality (DQ) fields such as: Quality of Name, Quality of SSN, Quality of DOB

Agency Administrators can review the [Duplicate Client Records Knowledge Base Article](#) for guidance on submitting de-duplication requests to the Help Desk.

Behavioral Health Services Act (BHSA) Compliance

BHSA requires all programs supported by Housing Intervention funds enter data into HMIS.

Existing Projects: All currently operating projects that will be transferred to BHSA-H.I. funding must be set up in HMIS with data entered for all current clients on or before June 30, 2026 – whether they have previously

participated in HMIS.

New Projects: For projects commencing on or after July 1, 2026, HMIS data entry is required beginning on the first day the first individual or household is served by the project.

HMIS Project Build for BHSO Office Hours

Wednesday, June 10 | 1 - 2:30 p.m., [register here](#)

Friday, June 12 | 10 - 11:30 a.m., [register here](#)

Project Performance Report - Goal 10 Overview

Goal: Ensure that clients are not returning to the homeless system after they have been placed in permanent housing destinations. For Homelessness Prevention projects, ensure that clients do not enter the homeless system after exiting to a permanent housing destination.

Applicable Project Types & Targets:

- Street Outreach: <= 10%
- Emergency Shelter: <= 10%
- Transitional Housing: <= 7%
- Rapid Re-Housing: <= 7%
- Permanent Supportive Housing (PSH) - Other Permanent Housing (OPH): <= 7%
- Homelessness Prevention: <= 10%

Universe: Clients that exited the project to a permanent housing destination during the reporting period. The Goal is calculated by the Leavers placed in permanent housing who return to the homeless system divided by the Total Leavers exited to permanent housing.

Making Corrections for Goal 10

- Review the Returns to Homelessness Column for clients with a “Yes”. Review clients’ Project Start Dates, Project Exit Dates, and Housing Move-In Dates and update if incorrect.
- Review for any overlapping enrollments that need to be fixed.
- Review clients’ Destinations and update if incorrect.
- Review the Enrollments Household Type column to verify that each client has the correct Household Type. Clients highlighted in yellow (N/A) need to be corrected in HMIS, as they are displaying an incorrect household type.

Goal 10: Project Start Date & Exit Date

- Street Outreach
 - Project Start Date in HMIS: Date of first contact with the client.
 - Project Exit Date in HMIS: ES/TH referral: the date the client enrolled into ES/TH. PSH-OPH referral: the housing move-in date in the PSH project.
- Emergency Shelter
 - Project Start Date in HMIS: Night the client first stayed in the shelter.
 - Project Exit Date in HMIS: The last day of continuous stay in the project before the client transfers to another residential project.
- Transitional Housing

- Project Start Date in HMIS: Date the client moves into the residential project.
- Project Exit Date in HMIS: The last day of continuous stay in the project before the client transfers to another residential project.
- PSH-OPH and Rapid Re-Housing
 - Project Start Date in HMIS: Date the client was admitted into the project. Admitted meaning all three below are met. The client:
 - Meets criteria for admission.
 - Indicates desire to be housed in the project.
 - Able to access services & housing through the project
 - Project Exit Date in HMIS: The last day the client receives rental assistance or supportive services or is provided rental assistance.
- Homelessness Prevention
 - Project Start Date in HMIS: Date client first began working with the project.
 - Project Exit Date in HMIS: The last day a service was provided.

Goal 10: Housing Move-In Date

- Records the date a client or household physically moves into a unit after being enrolled in a Permanent Housing (PSH, OPH, or RRH) project.
- Entered on the Head of Household's enrollment screen and must be updated when the client or household moves into a unit.
- When reviewing housing move-in dates for PPR corrections, ensure that it occurs either on or between the project start date and project exit date.
- Additional information can be found in the [Housing Move-In Date](#) KB.

Project Performance Report

The Transitional Housing (TH) 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 Emergency Shelter (ES) 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.

Emergency Transfer Plan Reporting

Beginning in the fall, HUD will require agencies with ESG-funded projects to implement an *Emergency Transfer Plan* (ETP).

ETPs are written policies that define the process victims of domestic violence, dating violence, sexual assault, and stalking can take to transfer from an unsafe housing unit to a new, safer housing unit.

Reporting will be conducted through the [Sage HMIS Reporting Repository](#), and ESG recipients will provide information about their ETPs in their CAPER submissions.

[HUD Form 5384](#) outlines all the relevant reporting information for ESG recipients

Training and Resources

HMIS Data Quality Training:

The OC HMIS Team will be hosting a *Critical Dates and Overlapping Enrollments* data quality training webinar on:

Friday, June 19th @1:00PM

[Click here](#) to join!

Meeting ID: 815 9606 2734

Registration is not required

Please review the [OC HMIS Calendar](#) to find upcoming HMIS meeting and training details.

Agency Admin Resources:

The meeting materials for our *Agency Administrator Training* webinar can be found on the OC HMIS website by navigating to:

[HMIS Help](#) > [HMIS Recorded Trainings](#)

HUD Manuals:

- [CoC Program HMIS Manual](#)
- [ESG Program HMIS Manual](#)
- [HMIS Comparable Database Manual](#)
- [VA Programs HMIS Manual](#)
- [HUD-VASH Program HMIS Manual](#)
- [HOPWA Program HMIS Manual](#)

CES - City Prior and Current Living Situation

Effective June 1, 2026, CES will be utilizing the most updated [Current Living Situation Assessment \(CLSA\)](#) to reflect SPA on the Community Queue.

- The CLSA must have a geolocation selected for SPA changes to reflect the CES Participant's SPA.
- If a CLSA is not added, or if a geolocation is left blank, City Prior to CES Enrollment will be used to reflect the CES Participant's SPA.

CES Access Points **DO NOT NEED** to update caseloads, unless the city in which the CES Participant is receiving CES services has changed.

If you have any questions about the CLSA change for CES, please contact coordinatedentry@ceo.oc.gov

Survey

The HMIS Team invites users to complete our *HMIS User Meeting Survey*. The feedback from the survey is used to select 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/PMSQNVQsTyJih4ZQ9>

Q&A

Duplicate Client Profiles

- Q: Should a record merge request be submitted if one of the records is public but the other is public?
 - A: Unfortunately we cannot merge a private record with a public record but it's important to determine what privacy options the client currently prefers. If the client has a private record and wants their public record made private, the Help Desk can support with record anonymization or privatization. Alternatively, if the private record needs to be made public, we can also support this and merge the public records assuming we have enough PPI to confirm a match.

Contacting the Help Desk

- Q: Is there an HMIS help desk number or can users only submit tickets?
 - Agency Administrators can contact the Help Desk by phone or [ticket](#).
 - To contact the Help Desk by phone, Agency Administrators can call 714-589-2360.

Reporting

- Q: ICES data clean up report emails contain an data error type titled "agency error," however, there is no information in the body of the email describing what this means.
 - A: The ICES data clean-up report is created and sent by the Individual CES Administrative team. Please reach out to your ICES Administrators for guidance about this error type.

Future Meeting Information

July 2026 HMIS User Meeting Webinar

- Date: Wednesday, July 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.