

OC HMIS User Meeting Webinar Minutes  
05/06/26

## Contents

Agenda Items	1
HMIS Participating Agencies Schedule	1
HMIS Data Entry & Performance Impact	1
Privacy and Personal Identifying Information Guidance	2
Client Consent Form Update	2
Program Move and CES Referral Connections	3
Data Element Highlight: Disabling Condition	3
2026 Agency Audit	4
SPM Overview	4
Program Performance Report: Goal 8 & 9 Income	6
Project Performance Report	7
Meeting and Resources	7
Holiday	7
Survey	7
Job Opportunity	8
Q&A	8
Future Meeting Information	9
June 2026 HMIS User Meeting Webinar	9

## Agenda Items

### ***HMIS Participating Agencies Schedule***

#### PPR Corrections

- Transitional 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 04/01/2024 - 3/31/2026
  - 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](#)

## ***HMIS Data Entry & Performance Impact***

Data entered into HMIS is used to understand the characteristics of people served through the OC System of Care, and how effectively clients are being served through this system of care.

- Federal and State level: Data is aggregated for Orange County and submitted to inform how effectively our CoC is addressing homelessness as a system of care. Results of these reports impact the amount of funding our CoC will receive from these entities.
- Local level: In addition to reviewing data at the county-level, data is also aggregated at the project-level to inform how effective specific projects are at serving their clients. Local funders use this data to determine which agencies and projects they want to fund.

This means that accurate and complete data entry into HMIS is critical to ensure that your agency, and our CoC as a whole, continues to receive the funding needed to address homelessness in our community.

Data Entry & Data Quality Best Practices:

- Search for client records in HMIS prior to entering new clients to avoid duplicate profiles for the same client
- Confirm name spelling and review client documentation (if possible) to reduce data entry errors for Name, Date of Birth, and Social Security Number
- Enter data into HMIS directly instead of collecting data on a paper form
- Run data quality and performance reports at least quarterly to correct errors and identify areas for additional training
- Review data quality and performance correction files sent from the HMIS team, and update HMIS as needed
- Review knowledge base articles and training materials to understand how to collect specific data elements

## ***Privacy and Personal Identifying Information Guidance***

A reminder about Client Privacy and Personal Identifying Information

Best practices for sharing client information:

- Users should only use the client's unique identifier to identify clients in correspondence. This includes HMIS tickets, reports, work emails, and work related instant messaging apps.
- If users must share additional client information such as name, date of birth, or Social Security Number in a report or correspondence, please use an encrypted email or password protected file on your work network. If you are sending a report to HMIS, please use your agency's DropBox.
  - [Sending Client Information to the HMIS Help Desk](#)

## ***Client Consent Form Update***

The final page of the HMIS Consent to Share Protected Personal Information Form has been updated to reflect changes in the roster of HMIS participating agencies.

This form can be found on our website by navigating to:

HMIS Forms and Documents > [HMIS Policy and Privacy Forms](#) > Consent to Share Protected Personal Information

A complete list of all agencies that participate in OC HMIS can be found at:

<https://ochmis.org/contributing-agencies/>

### ***Program Move and CES Referral Connections***

If users mistakenly enroll a client in the wrong program HMIS Agency Admins can submit a ticket to the HMIS Helpdesk to perform a Program Move, and transfer that enrollment to the correct program.

A Program Move is not appropriate for clients who need to transfer enrollments to continue receiving services due to funding constraints.

Those clients should have two separate enrollments to maintain an accurate historical record of their enrollment history.

When working with enrollments that have Coordinated Entry System (CES) referrals attached, please exercise caution. HMIS Agency Admins should never delete an enrollment with a CES referral connection.

Instead, a Program Move must be requested. This ensures that the CES referral remains properly linked and the Program Move will reflect the accurate program the client is enrolled in. This step is critical for maintaining data integrity and ensuring clients remain accurately connected to their referrals and housing placement processes.

[Program Moves and CES Referral Connections](#) Knowledge Base Article

### ***Data Element Highlight: Disabling Condition***

HUD defines a disabling condition is one or more of the following:

As a physical, mental, or emotional impairment (including substance use disorder, PTSD, or brain injury) that:

Is long-term or of indefinite duration

Substantially limits the person's ability to live independently

Could improve with more suitable housing

A developmental disability

The disease of acquired immunodeficiency syndrome (AIDS) or any condition arising from the etiologic agency for acquired immunodeficiency syndrome (HIV)

Documentation is not required. Only projects that receive funding with eligibility criteria will need to collect documentation for disabling conditions.

Scenario 1: "Yes" to Disabling Condition, but "No" to all disability types.

User must review Disabling Condition = Yes for accuracy and determine if:

The client has a specific disability that is expected to be long-term and impair the ability to live independently.

The client has a developmental disability or has HIV/AIDS.

If the client response is not to both, then the client does not have a disabling condition.

Scenario 2: “No” to Disabling Condition, but “Yes” to a disability type that is expected to be long-term

If HIV-AIDS or Development Disability is selected, Disabling Condition must be “Yes.”

If a condition is marked “Yes” and is long-term, Disabling Condition must be “Yes.”

If the condition is not long-term, Disabling Condition must be “No.”

Ensure the main Disabling Condition field aligns with the selected conditions and duration.

Disabling Condition (Universal Data Element) correlates with the Disability/Health Condition (Program Specific Data Element). The distinction is UDE is collected for all clients for all programs and PSDE is only collected for specific funded programs (HUD, ESG, HOPWA, PATH, RHY)

### ***2026 Agency Audit***

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

We will reach out to your agency 2 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.

### ***SPM Overview***

- CoCs are required to measure their performance annually as a coordinated system and submit the results to HUD
- System Performance Measures (SPM) allow the CoC to evaluate and improve their performance as a whole
- SPM results are incorporated into the CoC application score, which impacts the grants awarded through the CoC Program funds

### **Report Specifications**

- Data is pulled annually from 10/1 through 9/30
- Current reporting period: 10/1/24 – 9/30/25

- Year-over-year trends and HUD submission are available on the HMIS website ([ochmis.org](http://ochmis.org) > Reports > HUD System Performance Reports)

HMIS Project Types: Street Outreach, Emergency Shelter, Transitional Housing, Rapid Re-Housing, Permanent Supportive Housing, Other Permanent Housing

#### SPM Measure Review

- Performance scores submitted to HUD over the past five year in solid yellow or red bars
- Performance for the current fiscal year in bars with diagonal lines
- Metrics and possible points from the previous CoC Application
  - Note that the CoC Application scoring is subject to change
- Metrics from the OC Strategic Plan

#### Measure 1: Length of Homelessness

- 1a: Days clients spend in ES or TH projects
- 1b: Days clients have been in their current episode of homelessness, including time prior to enrollment

CoC application - decrease the average time people are experiencing homelessness by at least 5% OR that that total length of time was 90 days or less.

- Metric NOT met.

#### Measure 2: Returns to Homelessness

- People return to the system of care after exiting to permanent destinations

#### Measure 4.1 & 4.4: Increase Employment Income

- Adults that increased earned income during enrollment and at exit

#### Measure 4.2 and 4.5: Increase Non-Employment Cash Income

- Adults that increased non-employment cash income during enrollment and at exit

#### Measure 5: People Experiencing Homelessness for the First Time

- Number of persons who become homeless for the 1st time

#### Measure 7a1 : Exits to Successful Destinations

- People that exit to successful situations from Street Outreach projects

#### Measure 7b1 and 7b2:

- 7b1: People that exited ES, TH and RRH projects to permanent housing
- 7b2: People in OPH or PSH projects that were placed in PH unit or exited to permanent housing

#### FY25 – 26 SPM Data Clean-Up Strategy

- Send quarterly Data Quality report corrections and publish public reports
- Host quarterly Data Quality training focused on LSA and SPM errors
- Additional training on reviewing client history and correcting ADHS
- Offer support with one-on-one meetings, including data collection workflow review to ensure compliance with the HUD Data Standards

- Additional training resource development and Federal Reporting web page
- Focus on data quality review during Agency Audits

## Conclusions

- Over the past few years, the CoC's system performance has remained consistent, which means that the CoC is consistently losing points on the CoC Application
- Improving system performance means more points on the CoC Application, which increases the likelihood of receiving additional CoC Program funds
- Reducing the length of time people are experiencing homelessness and increasing exits to permanent housing from Emergency Shelter will have the most impact on improving system performance
- Permanent housing opportunities with low or no barriers are critical to prioritize housing for those with the longest lengths of homelessness
- Creative strategies and additional permanent housing opportunities are needed in order to increase exits to permanent housing from Emergency Shelter

## ***Program Performance Report: Goal 8 & 9 Income***

Both Goal 8 and Goal 9 report on the outcomes of the homelessness system

- Goal 8 focuses on supporting clients with housing navigation to exit to successful housing situations
  - Encourages communities to ensure that those placements are also stable
- Goal 9 focuses on the retention of permanent housing

### ***Goal 8***

After project exit, clients should be placed into successful housing situations (permanent housing situations). Any move to a sheltered situation is considered a successful outcome for clients in Street Outreach projects.

Applicable Project Types:

- Street Outreach  $\geq 20\%$
- Emergency Shelter  $\geq 30\%$
- Transitional Housing  $\geq 75\%$
- Rapid Re-Housing  $\geq 80\%$
- Homelessness Prevention  $\geq 90\%$

This measure is collected for all clients exited during the reporting period.

Goal 8 is calculated as: *leavers exited to successful housing / total leavers*

### ***Goal 9***

After being placed in a housing unit, clients should be stabilized by either remaining in their permanent housing project, or by exiting the project to a permanent housing destination.

**Applicable Project Types:**

- Permanent Supportive Housing  $\geq 95\%$
- Other Permanent Housing  $\geq 95\%$

This measure is collected for all clients active during the reporting period with a housing move-in date or who were exited from the project(s).

Goal 9 is calculated as: *active clients stabilized in PH (with a move-in date) + leavers exiting to PH / total active clients with a housing move-in date + all leavers*

***Project Performance Report***

The Rapid Re-Housing (RRH) 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 Transitional Housing 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.

***Meeting and Resources***

The OC HMIS Team will be hosting our quarterly Data and Performance Management Meeting. Please join us on Thursday, May 21st via Zoom from 1:00 to 2:00 PM.

See our [HMIS Calendar](#) for additional details.

***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](#)

***Holiday***

The HMIS Team will be out of the office on Monday, May 25th in observance of the following holiday: Memorial Day. We will be back in the office on Tuesday, May 26th to support you.

## **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/irEUkKN2RDPSwwPAZ>

## **Job Opportunity**

The HMIS Team has a job opening for an HMIS Data Analyst.

If you are interesting in joining our team please review the job opportunity on the Orange County United Way Career page, [HMIS Data Analyst](#)

## **Q&A**

### Program Move and CES Referral Connection

- Q: Can the system identify program enrollments with a CES Referral Connection and prevent them from being deleted?
  - A: Our team will share this feedback with our Clarity vendor, BitFocus.

### 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](#).
- Q: How can users run their own Project Performance Report data for their agency?
  - A: To review Project Performance Reports, please access using this pathway: Reports > Orange County Clarity System Reports > Project Performance Report.

### Disabling Conditions

- Q: If an answer to the Disabling Condition question is incorrect and the user gets a prompt indicating that the answer is incorrect, will the answer be saved?
  - A: Yes. Users will still be able to submit the information as the error presents as a soft warning, however, it's advised that users review all data entry for accuracy before saving the enrollment data.
- Q: Is proof of disability needed to support any self-reported disability information.
  - A: For data entry, the client can self report and documentation is not required. But if your program has eligibility criteria then documentation is needed. Please review the HMIS data standards for additional guidance:

<https://www.hudexchange.info/programs/hmis/hmis-data-standards/standards/universal-data-elements/308-disabling-condition/>

- A: The [OC CES Academy Resource Library](#) is an County of Orange also provides guidance on Disabling Condition for OC CES. Create an account or sign-in as a guest to view the library.

## SPM Overview

- Q: If clients were enrolled prior to the OC Clarity system being in place, is it possible that their Length of Homelessness was auto-populated thereby causing the erroneous date?
  - A: Length of Homelessness is determined using the date the client reported as their current episode of homelessness started (ADHS), or project start date, if the ADHS date is blank. Part of the issue we are seeing is that the ADHS field will auto populate from a previous enrollment, and users are not verifying that the date appearing on the screen is still accurate prior to saving the enrollment.
- Q: Does HUD expect each CoC to contribute housing resources to decrease the LOS in ES and TH and not just rely on federal funding?
  - A: HUD wants to see improvement of our CoC HMIS system as a whole which could require additional planning and identifying local funding opportunities/solutions for successful outcome of the homelessness system of care.
- Q: How can an agency know which reports are required for their projects?
  - A: Agencies that are included in federal reporting will be notified via email/helpdesk ticket. If your agency does not receive these outcomes then you're excluded. Typically Services Only programs will be excluded from federal reporting.

## Attestation of Client Self-Reported Data

- Q: HUD is currently encouraging CoCs to move away from data collection using paper forms and focus more on direct electronic collection. For agencies that have been using the paper forms, especially for CoC and ESG projects, is there a way to add that attestation to the entry screen?
  - A: Currently our CoC accepts either electronic or paper signatures for the Client Consent to Share Protected Information. If your agency is interested in including an attestation field for self-reported data, you may request a custom signature field be added to your project entry screen.

## Notes

- Q: Is there a specific format required to enter notes in HMIS?
  - While there is no specific required format for structuring notes, the OC CoC has provided some best practice guidelines for Housing Notes and Case Notes which are outlined in the [Recording Case Notes and Housing Notes in HMIS](#) Knowledge Base Article.

### ***Future Meeting Information***

#### June 2026 HMIS User Meeting Webinar

- Date: Wednesday, June 3rd, 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.