November 2026
OC HMIS User Meeting

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Agenda

1. HMIS Participating Agencies Schedule
2. OC HMIS Policies and Procedures Update
3. Clarity Updates
4. Missing Destinations
5. Living Situation Response Categories
6. Filtering Using New Interface
7. System Performance Measures (SPM) and Longitudinal System Analysis (LSA) Timeline
8. CoC Dashboard
9. Project Performance Report
10. Meetings and Resources
11. Holiday
12. Survey
13. Q&A
14. Office Hours

Meeting materials and recording will be available on the OC HMIS website

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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.

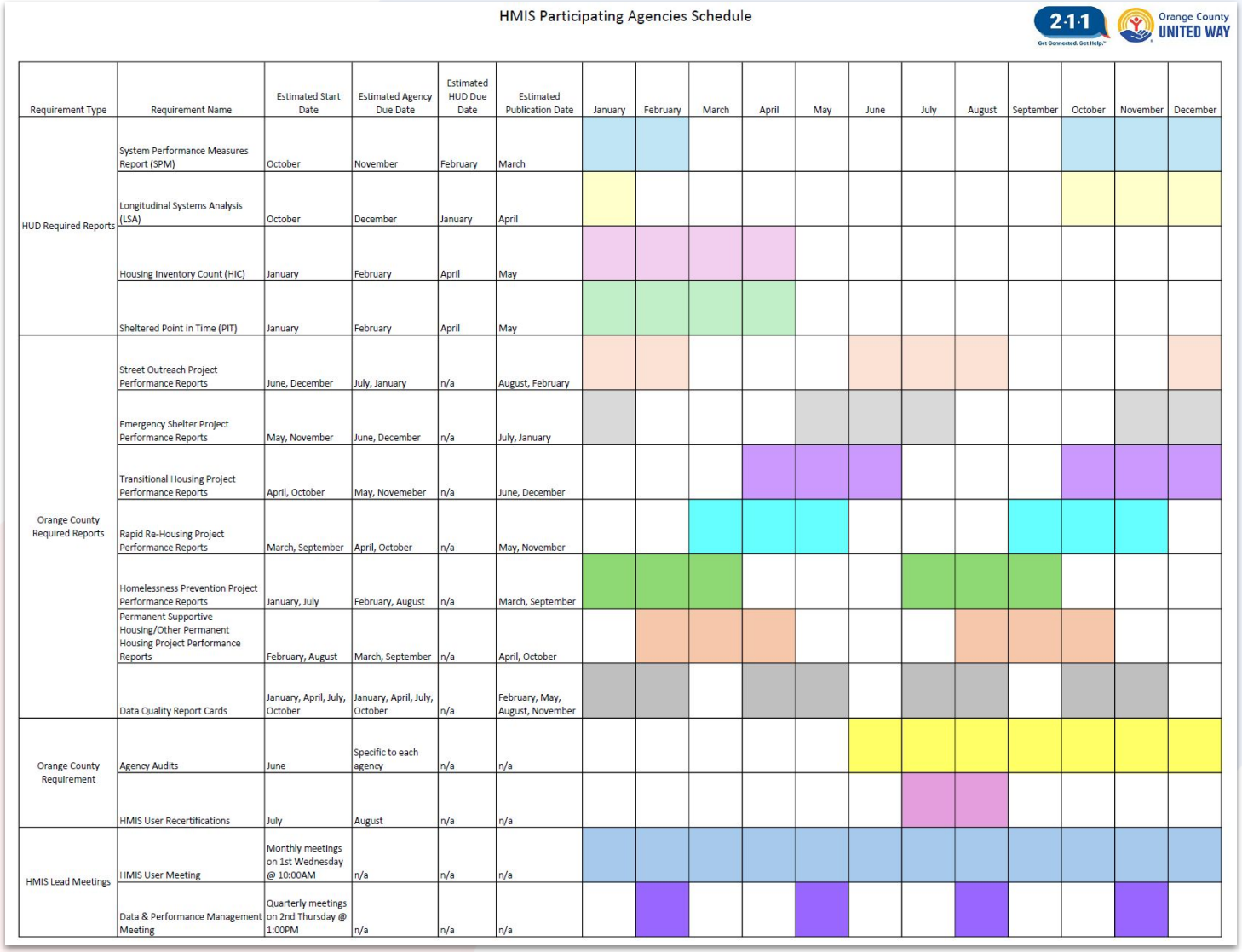
We request that you keep your questions general and related to the topics discussed in the meeting.

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.

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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												
	Longitudinal Systems Analysis (LSA)	October	December	January	April												
	Housing Inventory Count (HIC)	January	February	April	May												
	Sheltered Point in Time (PIT)	January	February	April	May												
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January												
	Transitional Housing Project Performance Reports	April, October	May, Novemeber	n/a	June, December												
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November												
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September												
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October												
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November												
Orange County Requirement	Agency Audits	June	Specific to each agency	n/a	n/a												
	HMIS User Recertifications	July	August	n/a	n/a												
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00AM	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a												

[HMIS Participating Agencies Schedule]

HMIS Participating Agencies Schedule

November

- Project Performance Reports
  - Rapid Re-Housing Publication
  - Transitional Housing draft data
- Agency Audits
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

December

- Project Performance Reports
  - Transitional Housing Publication
  - Emergency Shelter draft data
- Agency Audits
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

January

- Project Performance Reports
  - Emergency Shelter Publication
  - Street Outreach draft data
- System Performance Measure (SPM) Final Reviews and Longitudinal Systems Analysis (LSA) Data Quality Submission
- Housing Inventory Count and Point-in-Time (PIT)

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OC HMIS Policies and Procedures Update

The HMIS Lead convenes a working group on an annual basis at the direction of the CoC Board to review and update the HMIS Policies and Procedures and related documents. The following were approved by the CoC Board.



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Help Desk

- Any client-identifying data sent to the HMIS Help Desk from a Participating Agency will be considered a data breach, and will be handled according to the policies in that section

Agency Administrator Requirements

- HMIS Lead should be notified of users that no longer need access to HMIS within 2 business days.
- Project set-up changes must be reported to the HMIS Lead within 5 business days.

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OC HMIS Policies and Procedures Update

Agency Administrator Requirements Continued

- Project closures must be reported to the HMIS Lead within 15 business days of closure. Also, projects should be closed when they are not providing services for over 30 days.
- Agency Administrators must be employed by the Participating Agency, and cannot be a volunteer.

Privacy

- HMIS passwords should not be autosaved on any device, and if a password needs to be stored, a password manager should be used.
- Users that transition from one Participating Agency to another may have their HMIS account reactivated without requiring additional training if the user has logged into their account within the last 60 days, and the user will maintain the same level of access to HMIS.



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OC HMIS Policies and Procedures Update

Privacy Continued

- The Client Consent to Share Protected Personal Information Form can be sent to clients electronically via applications such as DocuSign.
- Agencies must explain that signing the Client Consent to Share Protected Personal Information form means that the client's record will be shared with other HMIS Participating Agencies for care coordination, and that the client's data may be shared in data requests approved by the CoC Board for analytical use or academic research purposes.
- Note Regarding Collection of Personal Information must be available in all areas where staff are collecting data from clients to be entered into HMIS. Outreach teams should have paper or virtual copies to share with clients.



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OC HMIS Policies and Procedures Update

Client Record Requests

- Allows clients to request their record directly from the HMIS Lead
- Provides guidance on how to verify a client's identity in person or virtually and how client records can be shared with clients.
- Documentation that the client provided or signed can now be included in Client Record Requests.
- If an agency chooses to provide case notes, Participating Agencies must redact identifying third party information, like staff or agency names, names of other clients, or shelter bed numbers before providing to the client.



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OC HMIS Policies and Procedures Update

Data Release

- Service Providers with access to Coordinated Entry data are not permitted to publish any Coordinated Entry data without approval of the CoC Board as outlined in the Data Request Matrix.
- The CES Lead and CES Administrators are required to adhere to policies outlined in the HMIS Policies and Procedures regarding Data Release.

Data Breach

- Agencies will make at least 3 attempts over 2 weeks to notify clients impacted by data breaches using telephone, secure email, and mail.
- Establishes corrective actions for data breaches.



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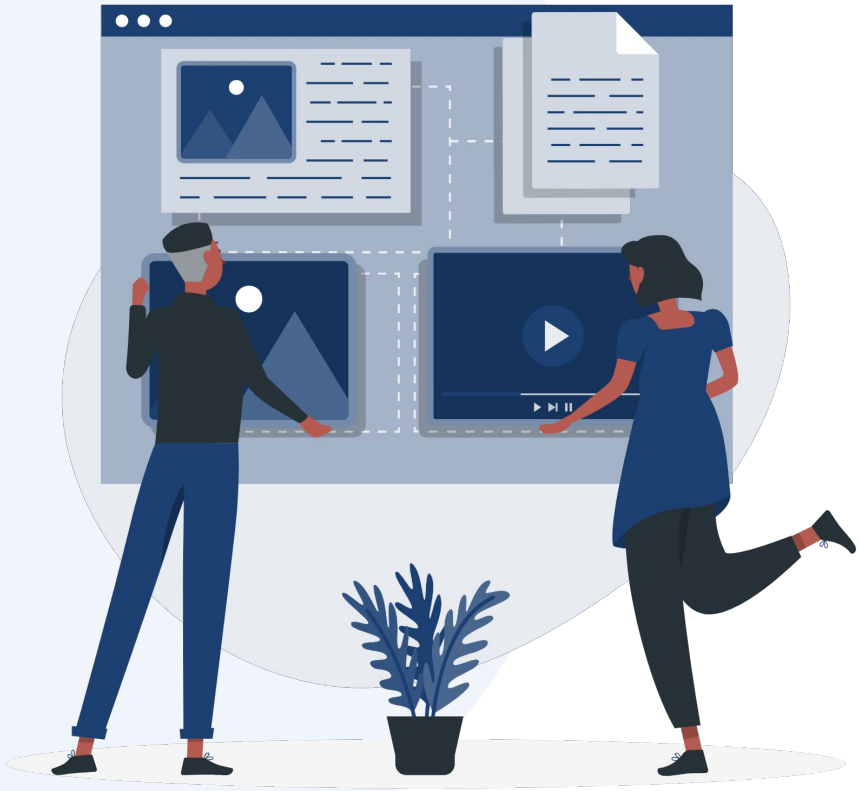
Clarity Updates

SSVF Homelessness Prevention

- All SSVF HP Targeting Criteria fields will be updated from Soft Required to **Required by EOD 11/4**

Screens Transition to New Interface

- Reports
- Explore
- Data Analysis



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Clarity Updates

Updated workflow Users will have the options to add additional households members right after program selection as Step 2.

Step	Before This Update	Now
1	Select the program.	Select the program.
2	Complete the first client's enrollment screen.	**Include household members (optional)**
3	**Include household members (optional)**	Complete the first client's enrollment screen.
4	Record the first client's CLS.	Record the first client's CLS.
5	Complete the next member's enrollment screen.	Complete the next member's enrollment screen.
6	Record the next member's CLS.	Record the next member's CLS.

CLS is required for Emergency Shelter Night by Night, Street Outreach, Coordinated Entry and PATH funded programs.

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Missing Destinations

Exit Destinations capture **where** a client will be staying, not necessarily why they are staying there or why they were exited. Accurately recording a client's exit destination is helpful for reporting purposes.

The following exit destinations are considered missing responses by HUD:

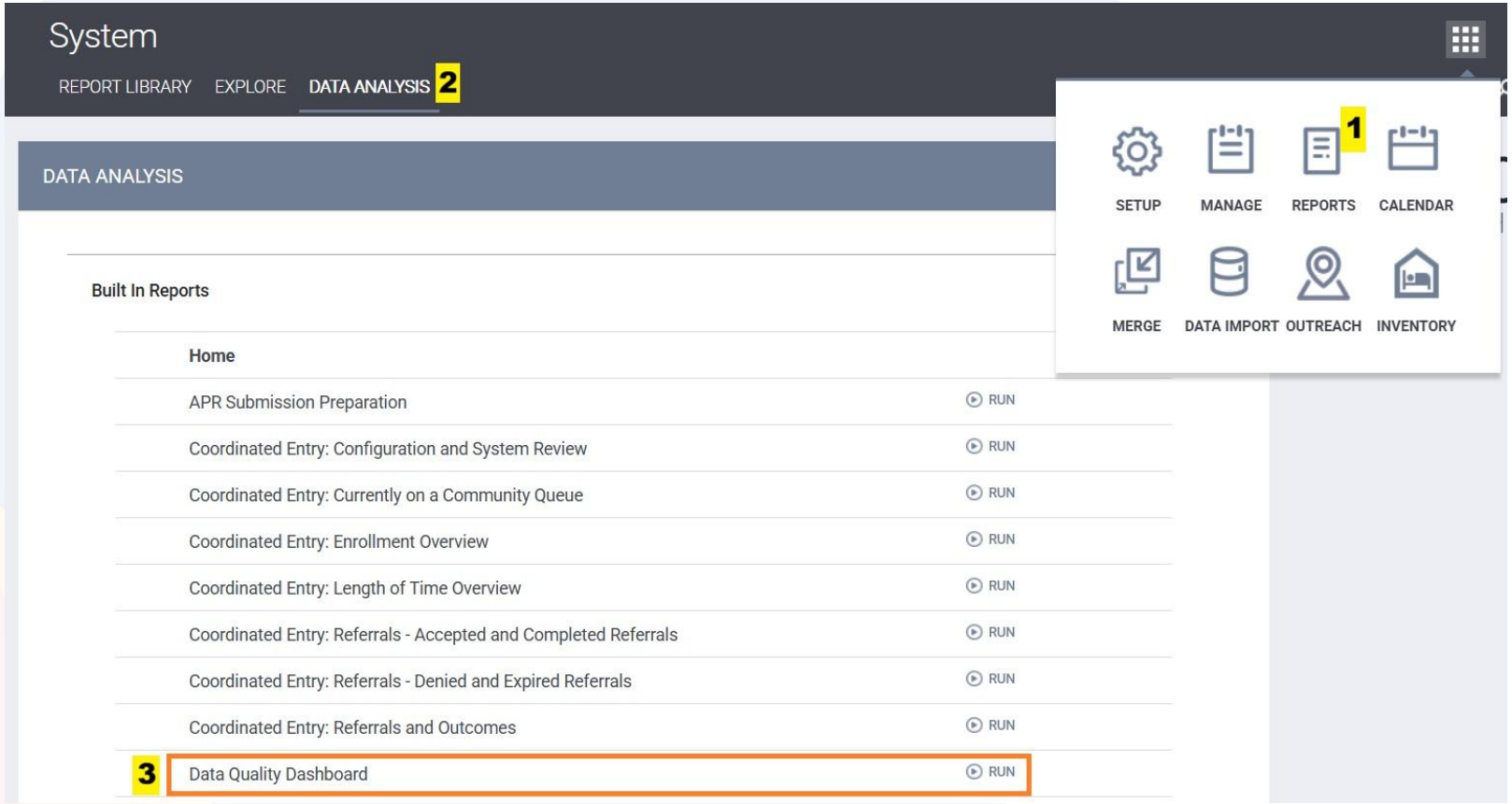
- **No Exit Interview Completed**
  - Use this response for clients that self exit
- **Client Doesn't Know**
- **Client Prefers not to Answer**
- **Data Not Collected**
  - This means that an exit interview was completed but the question was not asked
- **Other**
  - Should only be used as a last resort if the client's destination truly cannot be even loosely described by any of the available options
  - Any responses of Other will not count in reporting as a positive outcome

Missing Destinations Cont.

Agency Administrators should be reviewing their exit data regularly to catch and correct any “missing” exit destinations.

- Run the **Data Quality Dashboard** by navigating to the Data Analysis tab > Built in Dashboards > Data Quality Dashboard.

For more information on the Destination field, review the Destination Knowledge Base article.

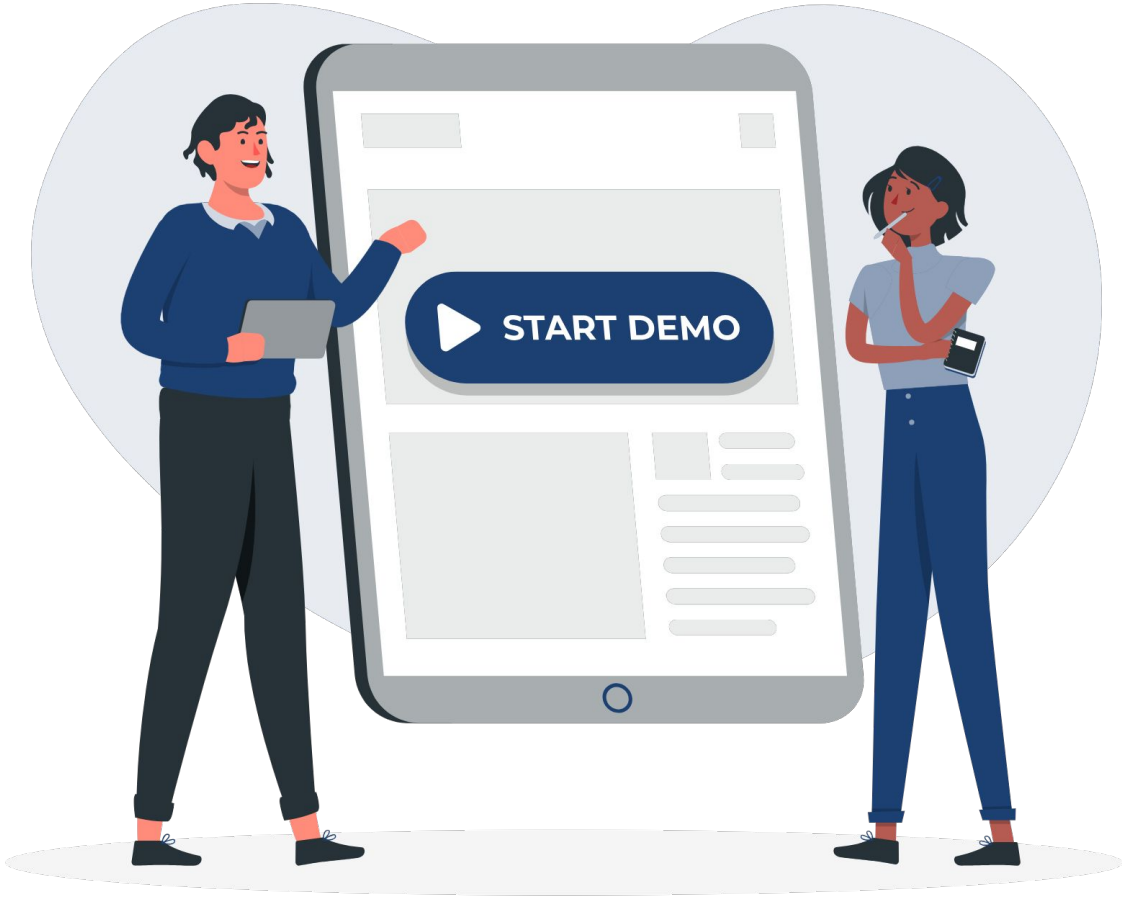


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Missing Destination Demo



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Living Situation Response Categories & Definitions

Appendix A lists the options for the following data elements: Exit Destination, Prior Living Situation, and Current Living Situation.

Example 1: A bed in a room shared with 3 others in a sober living home for seniors (65+)

Example 2: An apartment off-base paid using the Basic Allowance for Housing (client joined the military)

Please refer to our Knowledge Base articles on Prior Living Situations 3.917 A, 3.917 B, Current Living Situation, and Destination. For Appendix A please refer to the FY 2026 HMIS Data Standards.

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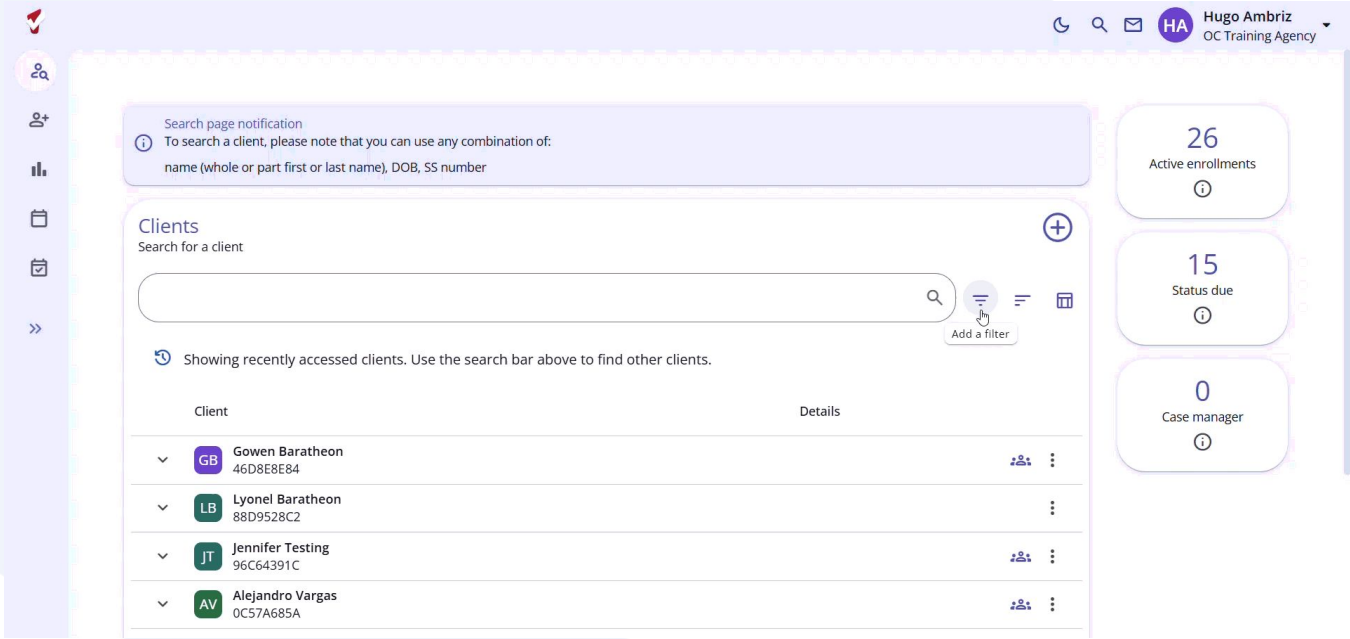
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New Interface Filters - Client Search Page

The client search page serves as the default user home screen and is used to search for and create new client records.

. Client search results be filtered by:

- Alias
- Client UID
- DOB
- First Name
- Last Name
- SSN
- Updated Date



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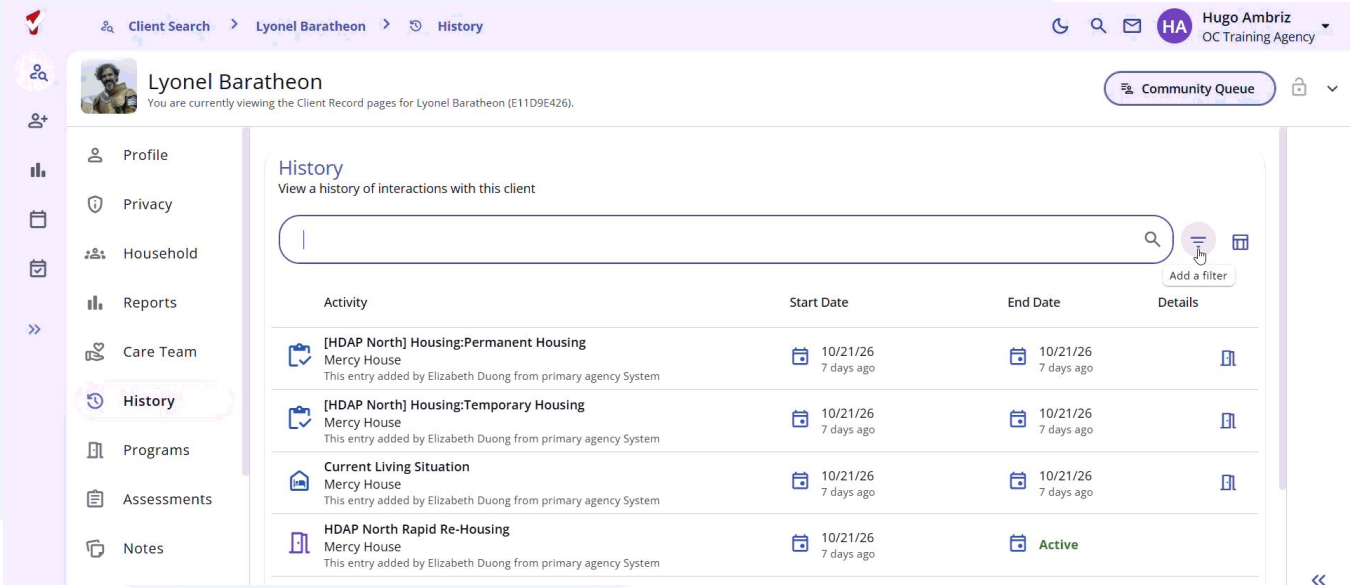
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New Interface Filters - History Tab

The history tab of a client's record includes a complete history of service items, program enrollments, referrals, reservations, assessments, and Coordinated Entry events.

History tab search results can be filtered by:

- Agency
- Category
- Coordinated Entry Status
- End Date
- Start Date
- Type

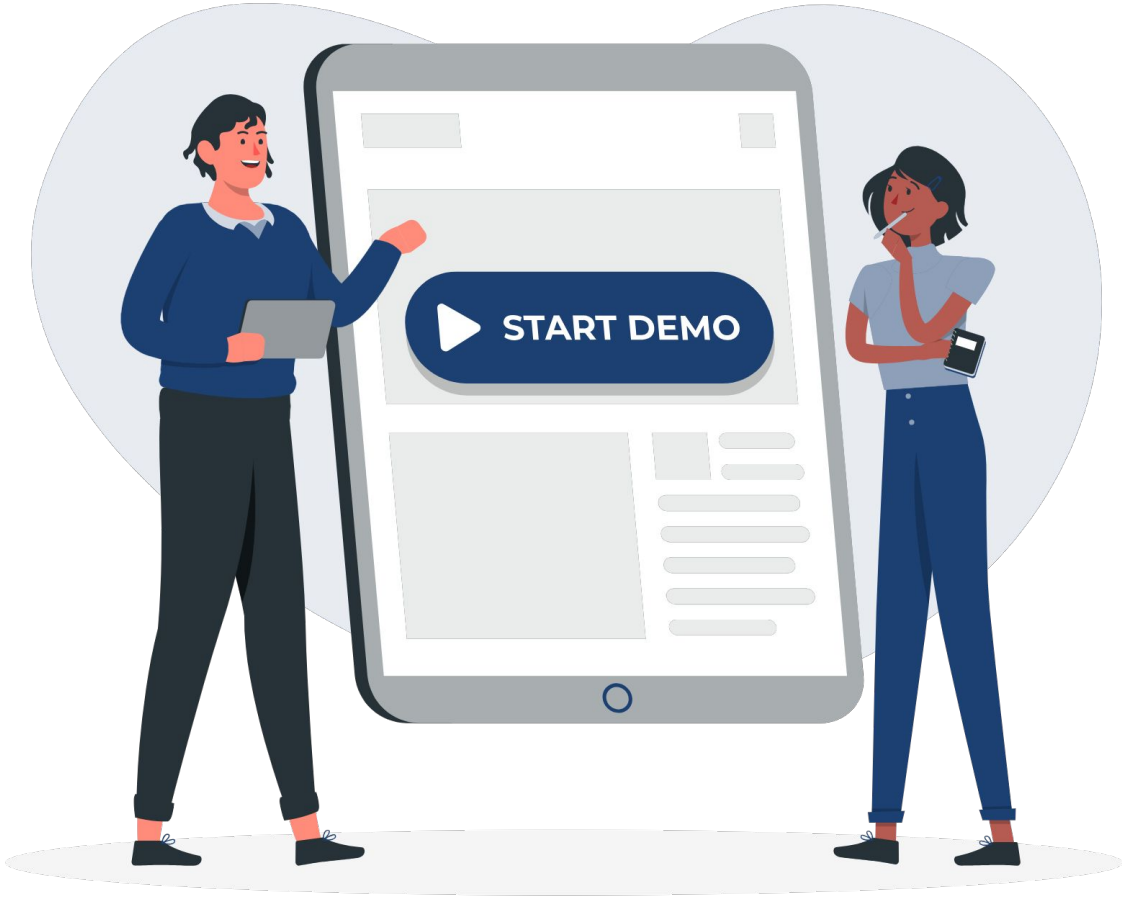


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New Interface Filters Demo



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Overview of Federal Reports: LSA and SPMs

What are they?

Longitudinal System Analysis (LSA):

An annual report which includes demographic, performance, and household composition information, as well as patterns of system use. The LSA from each CoC is consolidated to create the AHAR that is submitted to Congress.

System Performance Measures (SPMs):

Measures the performance of a Continuum of Care (CoC) as a whole in meeting the needs of people experiencing homelessness. Six measures comprise the SPMs, which are used as competitive elements in annual CoC Program Competitions.

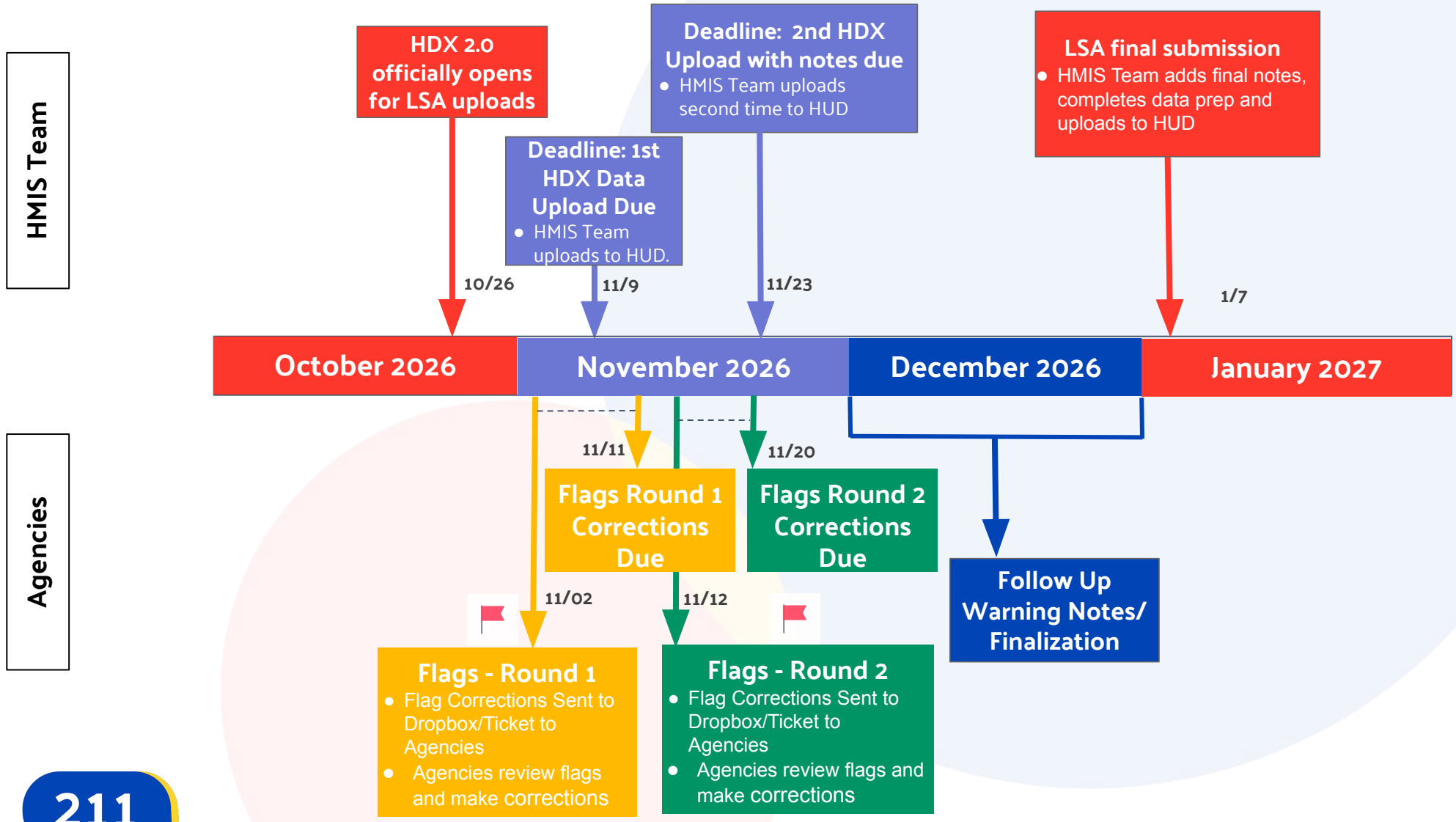
Reporting Period

10/1/2025 - 9/30/2026

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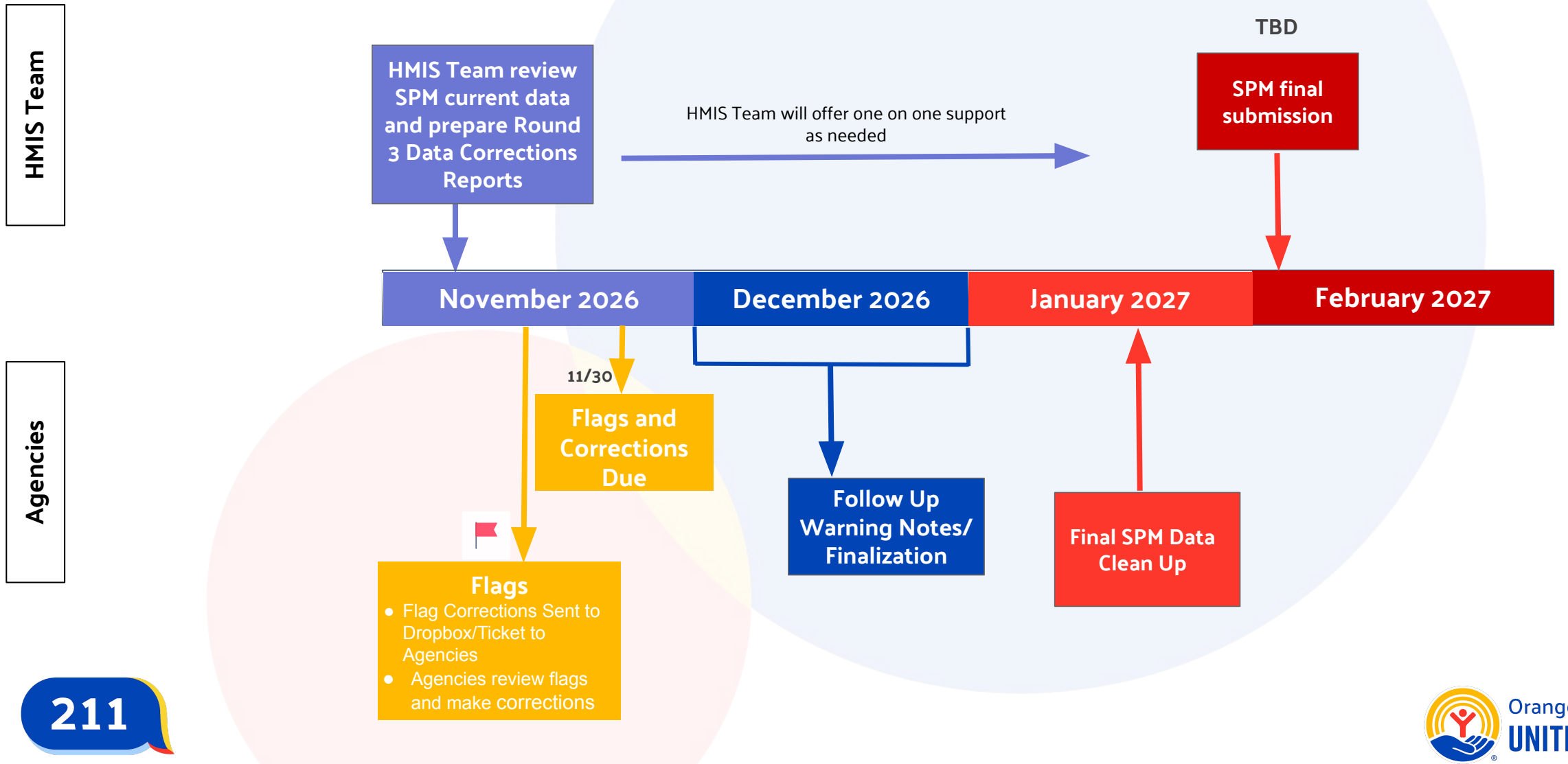
Longitudinal System Analysis (LSA) Timeline



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System Performance Measure (SPM) Timeline

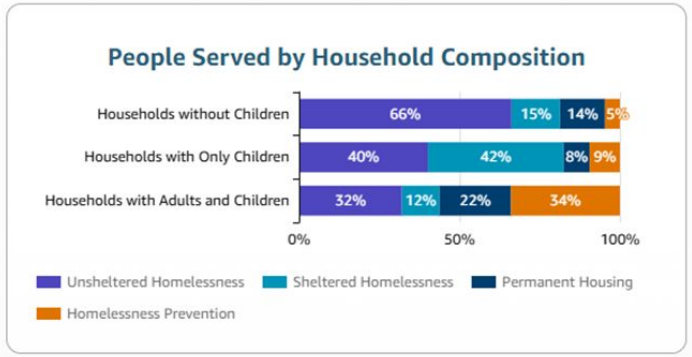


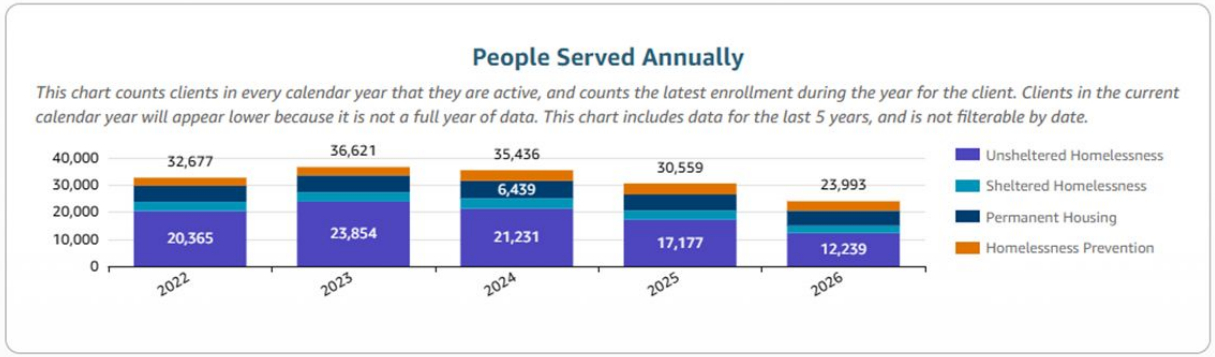
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CoC Dashboard

The CoC Dashboard is available, and is an overview of people being served in the Orange County CoC. The dashboard represents people being served in Coordinated Entry, Street Outreach, Emergency Shelter, Transitional Housing, Permanent Housing, and Homelessness Prevention projects participating in HMIS. Unless otherwise noted, the charts are an unduplicated count of clients using their latest enrollment. Monthly data will be included on the dashboard by the 2nd day of the following month.





How is the population changing?

The insights below compare data from the previous two complete years, and describe changes in total people served and people served by housing type. The insights are dependent on the population filters selected above.

Change in Total People Served

Total people served in 2025 **decreased by 13.76% (-4,877)** from 2024, from 35,436 to 30,559. This decrease suggests a **declining population** of people that are at-risk or experiencing homelessness in Orange County.

Increases in People Served by Housing Type

Increases in sheltered and unsheltered homelessness are negative because it indicates the population experiencing literal homelessness is rising. People in these housing types usually require additional assistance to achieve housing.

People served in the following housing types increased from 2024 to 2025:

- **Homelessness Prevention increased by 3.6% (141)** from 3,915 to 4,056.

Decreases in People Served by Housing Type

Decreases in sheltered and unsheltered homelessness are positive because it indicates the population experiencing literal homelessness is declining.

People served in the following housing types decreased from 2024 to 2025:

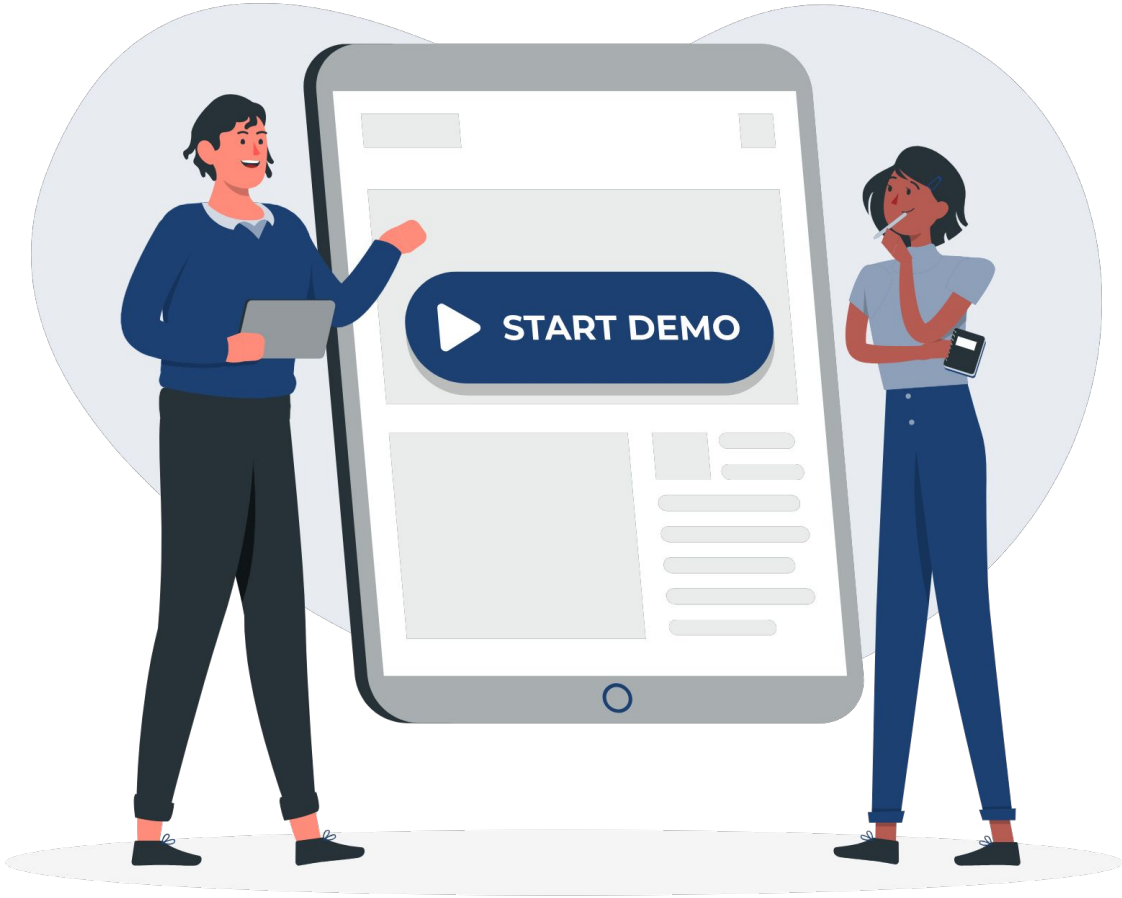
- **Unsheltered Homelessness decreased by 19.09% (-4,054)** from 21,231 to 17,177.
- **Sheltered Homelessness decreased by 12.7% (-489)** from 3,851 to 3,362.
- **Permanent Housing decreased by 7.38% (-475)** from 6,439 to 5,964.

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CoC Dashboard Demo



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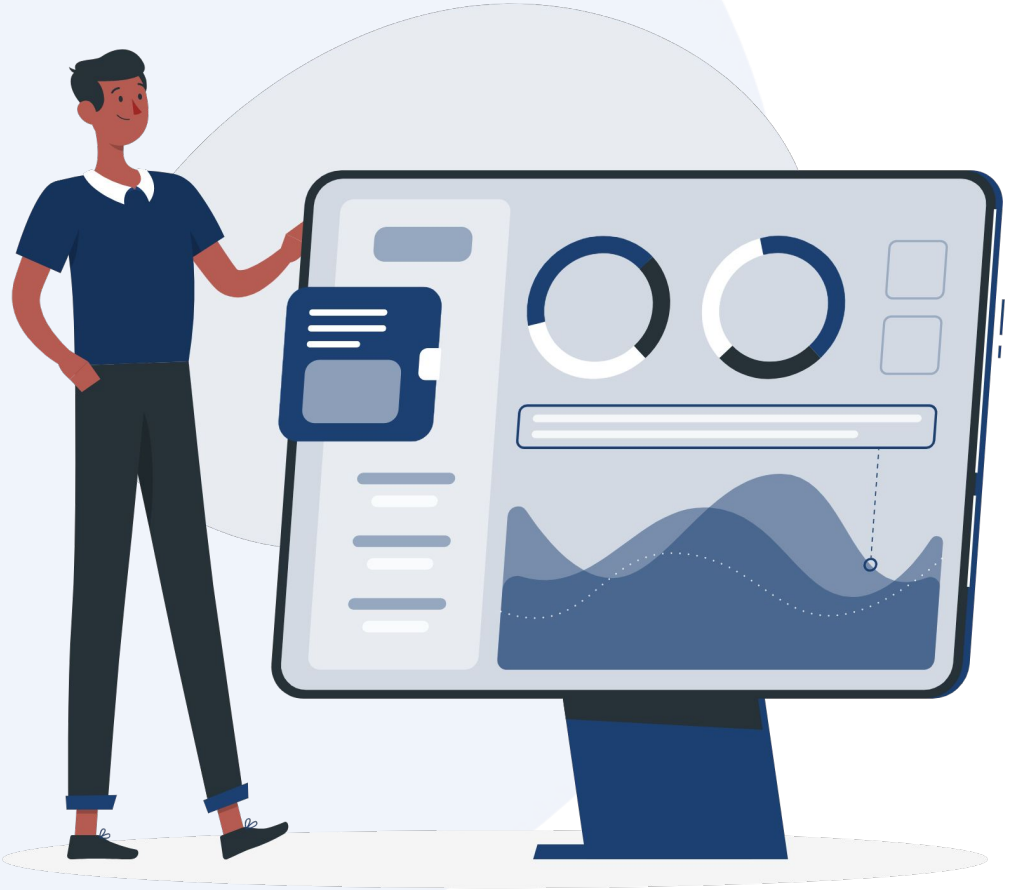
Project Performance Report (PPR)

The Rapid Rehousing PPR will be published on our website later this month.

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 available in Dropbox to review.

The Project Performance Overview is a helpful resource that provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



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Meetings and Resources

- Data and Performance Management Meeting
  - Thursday, 11/12 from 1PM - 2PM
    Click here to Join!
    Meeting ID: 857 7837 0017
    Passcode: 463529

- Resources
  - FY 2026 HMIS Data Standards
  - HMIS Fundamentals Curriculum

Meeting information and links available from the OC HMIS Calendar



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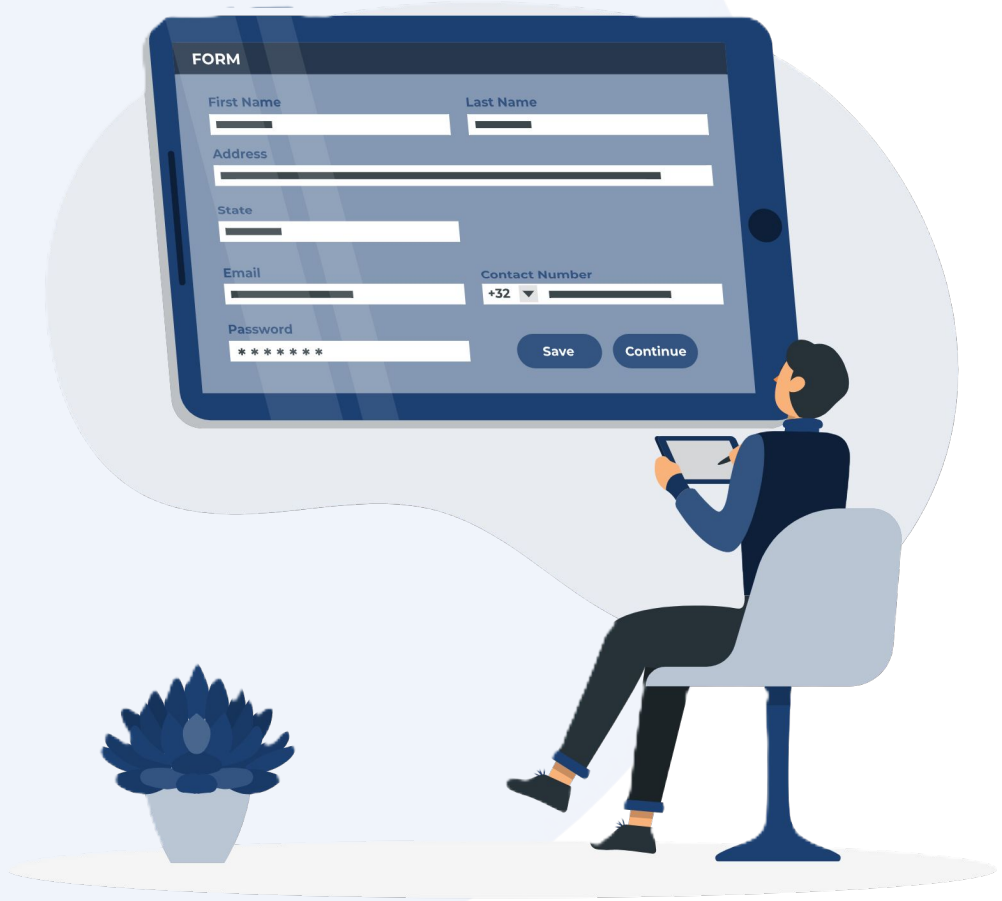
HMIS User Meeting Survey

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/YwkU3dDPLhP5VBcD8



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Holiday

The HMIS Team will be out of office for the upcoming holiday:

Thursday, November 26th and **Friday, November 27th** in observance of Thanksgiving.

We will be back in the office **Monday, November 30th** to assist you.

Please review the OC HMIS Calendar for HMIS Helpdesk closure.



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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: December 2nd

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