OC HMIS User Meeting Webinar Minutes
11/04/26

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Agenda Items

HMIS Participating Agencies Schedule

PPR Corrections

- Transitional Housing 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 10/01/2024 - 9/30/2026
    - 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

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. The updated Policies and Procedures will be published this month and we will be sending out a newsletter to the community when it is available.

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.
- 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.
- 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.

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.

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.

Clarity Updates

- SSVF Homelessness Prevention Targeting Criteria collected during intake and entered on the enrollment screen are set to required.
- Report screens have transitioned to the new interface.
- An update to data entry workflow is rolled out: Household Members selection option will appear after program selection.

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

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.

Living Situation Response Categories

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

Below are some common destination options and their examples that may cause the most confusion:

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).

For those who exit to a sober living home "Residential project or halfway house with no homeless criteria" would be selected as the destination regardless if it is a shared room or for seniors. Please note that substance use rehabilitation is different and would fall under the destination selection "Substance abuse treatment facility or detox center".

For those who exit to the military and who will live in housing covered by the military "Rental by client, with other ongoing housing subsidy" would be selected as the destination. Here we're looking for whether the housing is paid for regardless if it's on or off-base. Additionally, there is no ownership of said housing, and there are conditions for tenancy. Finally, value is ascribed to said housing. For example, a FMR (fair market value) rent for a unit of that size in that area is $2,900 a month.

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.

Filtering Using New Interface

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

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

System Performance Measures (SPM) and Longitudinal System Analysis (LSA) Timeline

We are currently preparing for two of the annual Federal Reports: the System Performance Measures (SPMs) and the Longitudinal Systems Analysis (LSA).

LSA

- HUD's HDX repository for the LSA, officially opened on October 26th.
- Round 1 of Flags were sent out for review and correction by agencies and are due November 11th.
- Round 2 of Flags will be sent out November 12th and are due on November 20th.
- The HMIS Team will be following up with agencies for outstanding data issues and required notes in December..
- The HMIS Team will upload our CoC's data for official submission on January 7th.

SPM

- HUD's HDX repository for the SPMs, official opening is TBD.
- Rounds 1 and 2 of corrections were completed in September and October.
- Round 3 of corrections will be sent out in mid-November and will be due on November 30th.
- The HMIS Team will be following up with agencies for outstanding data issues in December and continue to prepare the data for final submission in early February..

CoC Dashboard

The CoC Dashboard, which has just been released, 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.
Use this link to the CoC Dashboard to review the latest data.

Performance Report

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 be 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.

Training 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

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.

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!

Q&A

Missing Destinations

- Q: What is the best report to run that'll show all 'data not collected' entries?
    - A: Please see the following report, location provided: Data Analysis > Built in Reports > Data Quality Dashboard. This report will flag responses that are considered missing. Please feel free to submit a ticket if you may need any further assistance reviewing your agency's data.

Living Situation Response Categories

- Q: Regarding 3.917 Prior Living Situation Data Set in HMIS, could you clarify when a client sleeps in the following situations: at a friend's room "couch surfing", if it is under 7 days, meaning days 1-6, Does that mean it counts as literal homeless? Versus if they have hit 7 days of couch surfing, they are no longer literally homeless?
    - A: Here is HUD's exact language regarding Category 1: Literally Homeless:

      "Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning:

      1. Has a primary nighttime residence that is a public or private place not meant for human habitation; **or**
      2. Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); **or**

3. Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

Note: An individual or family only needs to meet **one** of the three subcategories to qualify as Homeless Category 1: Literally Homeless." Please see the following Category 1: Literally Homeless for additional information.

General Questions

- Q: Is there a way to remove the current living situation from PSH enrollments?
    - A: We'll need to further investigate this system error. The new interface roll out only includes CLS for project types that require the CLS.

- Q: If another agency does not exit a client and asks another agency to just update CES, does that affect the CES List? Does it still show the old agency?
    - A: I believe this may be a case where a different agency will transition into the primary Access Point? If that is the case, the new agency needs to reassign the Assigned Staff to themselves and update the Access Point on the enrollment screen. Please review this knowledge base article Reassigning Case Managers for additional guidance. Regarding the client's CES enrollment, the new primary Access Point will need to review and carry out actions to continue to keep the client active on the Community Queue. If you have a specific case, please feel free to reach out to the CES Lead/Admin Team to support reviewing CES data and participation.

Future Meeting Information

December 2026 HMIS User Meeting Webinar

- Date: Wednesday, December 2nd, 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.