

# October 2025 OC HMIS User Meeting

211

Get Connected. Get Help.™



Orange County  
**UNITED WAY**

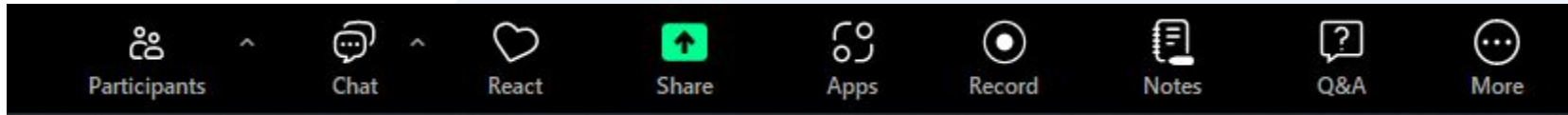
# Agenda

1. HMIS Participating Agencies Schedule
2. Clarity and Looker Outage
3. Funding Form
4. LSA Dashboard
5. Updates to HMIS Data Elements
6. Client Consent Form Update
7. CES Household Composition Changes
8. Project Performance Report
9. Training and Resources
10. Survey
11. Q&A
12. Office Hours

Meeting materials and recording will be available on the [OC HMIS website](#)



# 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.

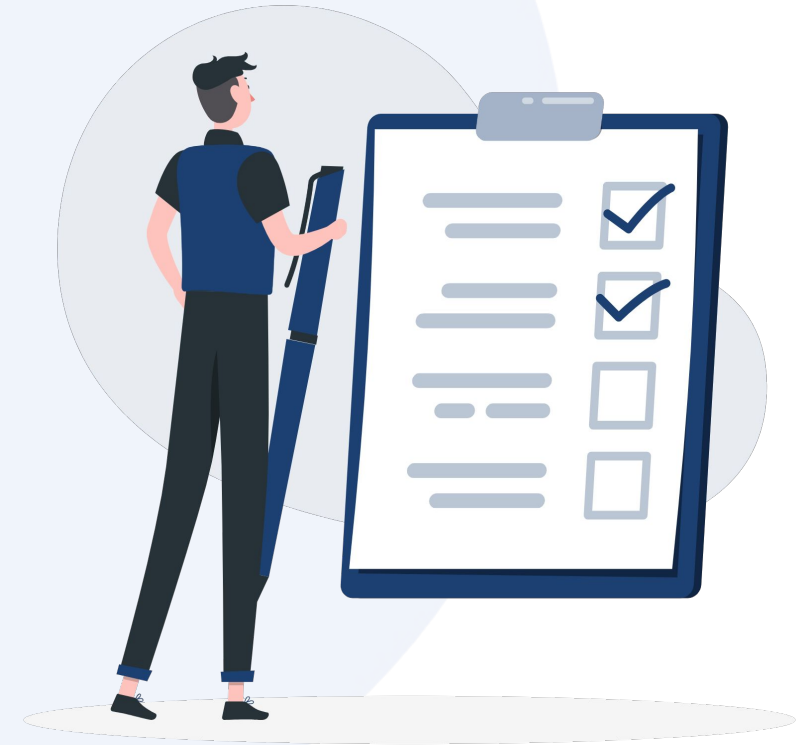
# HMIS Participating Agencies Schedule

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

HMIS Participating Agencies Schedule

# HMIS Participating Agencies Schedule

- HMIS Agency Audit
  - Scheduling July - December
- PPR Corrections
  - Rapid Re-Housing will be added to your agency's DropBox shortly
    - If you don't have a Goal 10 spreadsheet in DropBox, your agency didn't have any exit data during the reporting period of 09/01/2023 - 08/31/2025



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# Clarity and Looker Outage

We are currently experiencing an outage with Clarity and Looker which generates all the HMIS Reports.

Our vendor BitFocus is currently working on a solution.

Thank you for your patience, we are hoping Clarity and reports will be back up and running shortly.



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# New Funding Form Available

Agency Administrators can now submit the **Request to Add Funding to Existing Project Form** to provide information about new or renewed funding for their existing projects.

The request form captures...

- Funding Source type (e.g. CoC, ESG, HOME)
- Grant ID/Name or grant number
- Grant dollar amount
- Grant start date and end date

Users can update multiple projects with multiple funding sources using a single form submission.

[ochmis.org](https://ochmis.org) > HMIS Forms and Documents > HMIS Data and Set-up Forms > For Agencies/Projects Currently Set-up in HMIS > [Add Funding to Existing Project Form.](#)

## Funding Information

### Project 1

Project Name \*

test

Please provide the project name as it appears in OC HMIS.

Project Type \*

Other

Please see [pages 27-30 of the FY2024 HMIS Data Standards](#) to determine the correct program type for your program.

## Funding/Grant Information

### Grant 1

Funding Status \*

Funding Source \*

Grant Identifier/Name \*

If your contract includes a grant number, please enter it here.

Grant Amount

Grant Start Date \*

Grant End Date

# Monthly Dashboard Highlight: October 2025

## LSA Data Cleanup: Household & Enrollment Data

The Household & Enrollment Data Dashboard is designed to identify common issues with household and enrollment data that impact the LSA submission as well as any other performance metrics that are related to Households.

Here are a few examples of common issues:

- Program Enrollment w/ No Head of Household
- Heads of Households younger than age 6
- Clients with Missing Date of Birth
- Clients Born After their Enrollment Start Date

To learn more about this dashboard, please review the [LSA Data Cleanup: Household and Enrollment Data KB article](#) in the Help Center.

To run the Household and Enrollment Data report go to *Reports > Data Analysis > Built In Reports > LSA Data Cleanup: Household and Enrollment Data > Hit Run.*

Adjust the 'Agency Name,' filter to your agency or Program Name to a particular program in your agency.

The reporting period, and all parameters are automatically set for you.



# LSA Data Cleanup Dashboard Demo

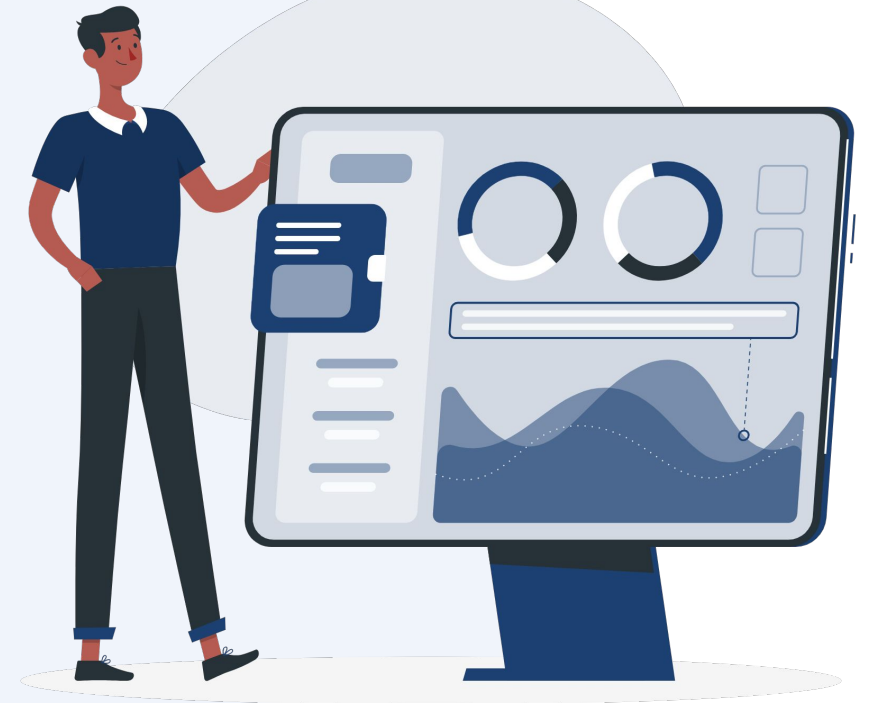


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# Updates to FY2024 HMIS Data Standards

HUD has released the [updated FY2024 HMIS Data Standards Manual](#). These changes will be implemented in HMIS as of **October 1st**, and include updates for the following screens/projects:

- Client's Profile Screen
- Enrollment Screen
- VA/HUD VASH Funded Programs
- RHY Funded Programs
- SSVF Funded Programs



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# Updates to FY2024 HMIS Data Standards Cont.

## Client's Profile Screen

Project Type Applicability: All Programs/Components

Data Collected About: All Clients

Screens in HMIS: Client's Profile

- 3.06 Gender is optional
- 3.04 Race and Ethnicity
  - Updated - Hispanic/Latina/o

CREATE A NEW CLIENT

Social Security Number	000 - 00 - 4321
Quality of SSN	Approximate or partial SSN reported ▼
Last Name	Client
First Name	Example
Quality of Name	Full name reported ▼
Quality of DOB	Approximate or partial DOB reported ▼
Date of Birth	01/01/1996 Adult. Age: 29
Middle Name	None ▼
Gender	Select ▼
Race and Ethnicity	Hispanic/Latina/o ▼
Additional Race and Ethnicity Detail	
Veteran Status	No ▼

# Updates to FY2024 HMIS Data Standards Cont.

## Enrollment screens

Project Type Applicability:

- HUD CoC - except Coordinated Entry
- HUD ESG
- HUD HOPWA
- HUD VASH - Services Only
- HUD PATH
- HHS RHY
- VA SSVF

Data Collected About: All Clients

Screens in HMIS: Program Enrollment

- 4.21 Sex is a required field

ADDITIONAL INFORMATION

Sex	Select <input type="button" value="v"/>
	Select
	Female
	Male
	Client doesn't know
	Client prefers not to answer
	Data not collected

# Updates to FY2024 HMIS Data Standards Cont.

## Enrollment screens

Project Type Applicability: VA/HUD VASH funded programs

Data Collected About: All Clients

Screens in HMIS: Program Enrollment

- 4.05 - 4.10 Specific Disabling Conditions removed and not required for programs funded with VA/HUD VASH

DISABLING CONDITION AND BARRIERS	
Disabling Condition	Select <input type="button" value="v"/>
Survivor of Domestic Violence	<input type="button" value="Select"/>
	No
	Yes
	Client doesn't know
	Client prefers not to answer
	Data not collected

# Updates to FY2024 HMIS Data Standards Cont.

## Enrollment screens

Project Type Applicability: RHY Funded Programs

- Emergency Shelter - Entry Exit
- Transitional Housing
- Homelessness Prevention

Data Collected About: Head of Household and Adults

Screens in HMIS: Program Enrollment

- R13 Family Critical Issues - Toggle field is updated to Picklist
  - No
  - Yes
  - Client doesn't know
  - Client prefers not to answer
  - Data not collected

FAMILY CRITICAL ISSUES	
Unemployment - Family Member	Select ▼
Mental Health Disorder - Family member	Select ▼
Physical Disability - Family Member	Select ▼
Alcohol or Substance Use Disorder - Family member	Select ▼
Insufficient Income to Support Youth - Family Member	Select ▼
Incarcerated Parent of Youth	Select ▼

# Updates to FY2024 HMIS Data Standards Cont.

## Enrollment screens

Project Type Applicability: VA SSVF Funded Programs

Data Collected About: Head of Household and Veterans

Screens in HMIS: Program Enrollment

- New Data Element: V10 Mental Health Consultation
  - Mental health consultation completed
  - Mental health consultation being coordinated/arranged with VA provider
  - Mental health consultation being coordinated/arranged with other provider
  - Offer declined

ADDITIONAL INFORMATION	
VAMC Station Number	(600) Long Beach, CA
Connection with SOAR	Select
Household Income as Percent of AMI	Select
Last Grade Completed	Select
Employed	Select
Mental Health Consultation	Select
Sex	Select

Select

Mental health consultation completed

Mental health consultation being coordinated/arranged with VA provider

Mental health consultation being coordinated/arranged with other provider

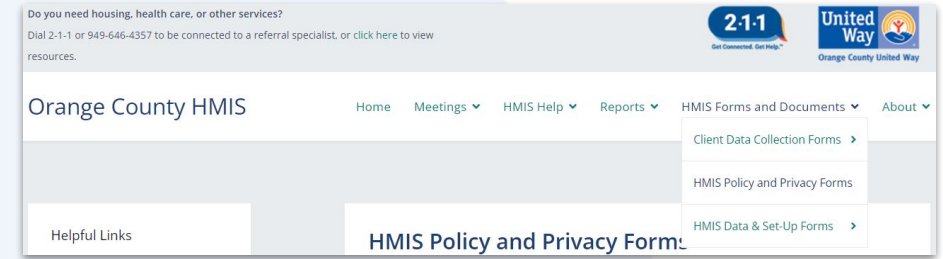
Offer declined

# 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/>



# CES Household Composition Changes

In some cases, a household may be served by both the Individual and Family Coordinated Entry System. This occurs when the household's composition has changed or is expected to change. Events that can result in a change in household composition may include but are not limited to clients that become pregnant, a single adult merges households with another adult with a child, or children are permanently removed from the household.

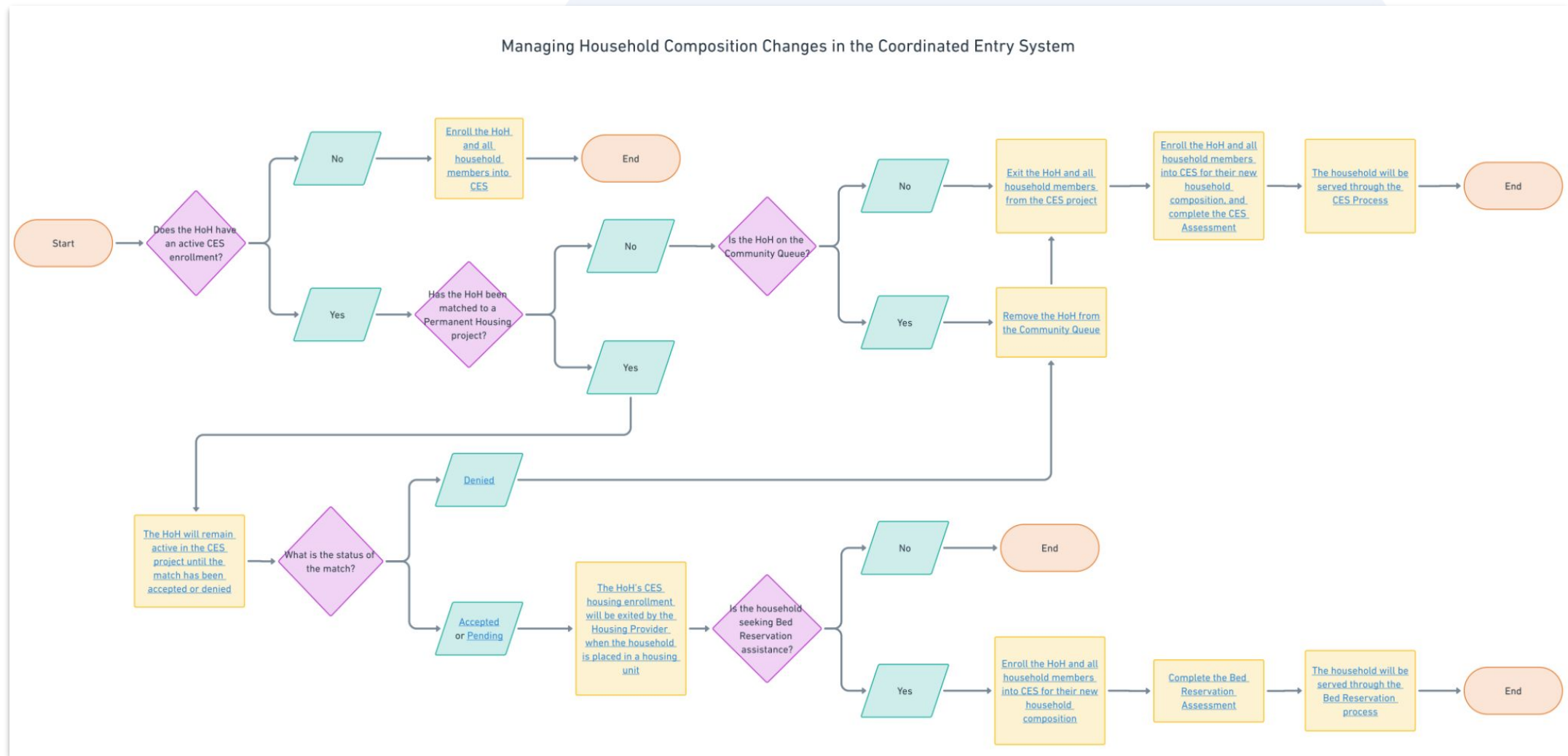
Scenario 1: The household is active in the CES project, has a change in household composition, and has not been matched to a housing project.

Scenario 2: The household is active in the CES project, has a change in the household composition, and has been matched to a housing opportunity.

- Household is accepted into the housing project
- Household is denied the housing opportunity

KB: [Managing Household Composition Changes in the CES](#)

# CES Household Composition Changes Cont.



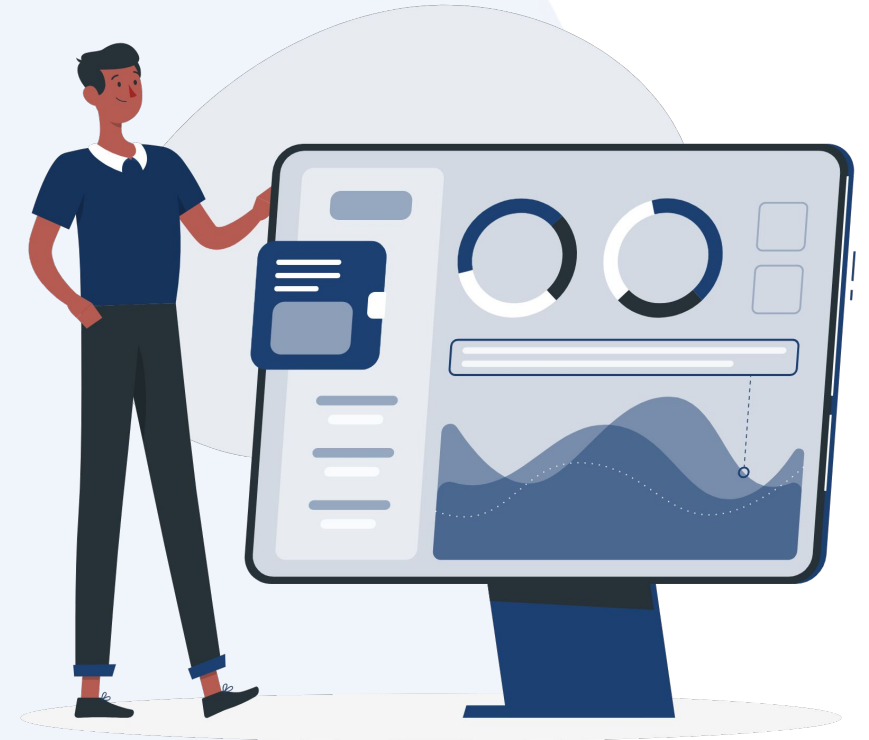
# Project Performance Report (PPR)

The Permanent Supportive Housing (PSH) PPR will be published 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 Rapid Re-Housing (RRH) 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.



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# Training and Resources

## Upcoming Trainings:

### [HMIS Reports Training: PPR Goal 6-10](#)

- Wednesday, October 29th @ 2:00pm
- No need to register in advance

More information about upcoming trainings can be found on the [OC HMIS Calendar](#)

## Community Resources:

Helpful Coordinated Entry Resources may be found on the Office of Care Coordination's [OC CES Academy website](#).



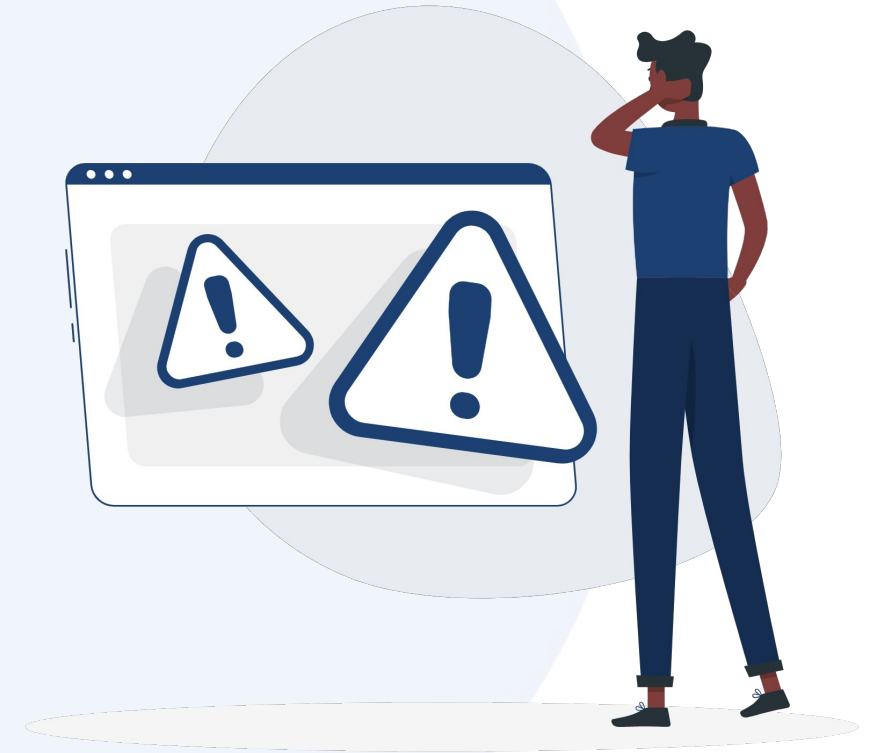
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# HMIS Meeting Survey

Our HMIS Helpdesk Team invites users to complete the HMIS User Meeting Survey.

Please let us know what topics you're interested in reviewing in the upcoming monthly meetings.

Survey: <https://forms.gle/jZVripzYYrMkP5Lm7>



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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: November 5th**





Orange County  
**UNITED WAY**

# Understanding Individual Enrollments and Group Enrollments

## Individual Enrollments

- Clients who are enrolled in a project alone are enrolled as an individual.
- The individual enrollment appears in the Program History of the client enrolled in the project.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
CoC Funded Rapid Re-Housing Training Project PH - Rapid Re-Housing OC Training Agency	10/01/2022	Active	Individual

## Group Enrollments

- Clients who are enrolled in a project with other members are enrolled as a group.
- Group enrollments are created at enrollment or under the program of any of the household members that are already enrolled in the project.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
ESG Funded Homeless Prevention Training Project Homelessness Prevention OC Training Agency	05/18/2023	Active	Group

# Understanding Individual Enrollments and Group Enrollments

Before adding a client to an existing group enrollment, they must first be added to the [Global Household](#) with other members of the group.

To [add individual clients to a group enrollment](#), navigate to the programs tab and open the desired group enrollment.

Find the Program Group Members (+) section to view/add a member from the Global Household.

Select the clients joining the group enrollment then click ENROLL to complete the client's enrollment.

The member will appear under the Program Group Members; the enrollment date will reflect the date the client was added to the group enrollment.

The screenshot shows a software interface for a client named Frodo Baggins. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', 'REFERRALS', and 'SERVICES'. The 'CLIENT PROFILE' section displays personal information such as Social Security Number, Last Name (Baggins), First Name (Frodo), and Date of Birth (07/09/1990). To the right, the 'Household Members' list includes Bilbo Baggins (Uncle), Pippin Took (Cousin), Gandalf White (Roommate), Meriadoc Brandybuck (Cousin), and Legolas Greenleaf (Roommate). Below this, a green banner indicates '1068 DAYS ACTIVE PROGRAM'. The 'Program Details' section shows: Program Type: Group (4), Program Start Date: 10/01/2022, Assigned Staff: Friendship Shelter Training Account, and Head of Household: Frodo Baggins. The 'Program Group Members' table lists three active members: Bilbo Baggins (enrolled 10/01/2022), Pippin Took (enrolled 08/28/2025), and Gandalf White (enrolled 09/03/2025). A sidebar on the right shows a search bar and a 'CASELOAD' section with a 'Group Members (+) Add' button.

Member Name	Enrollment Date	Status
Bilbo Baggins	10/01/2022	Active
Pippin Took	08/28/2025	Active
Gandalf White	09/03/2025	Active

# Understanding Individual Enrollments and Group Enrollments

If the client you are looking to add does not appear under ‘Add Program Group Members...’

1. Verify the client is a Global Household member with the other group members.
2. If the client is a member of the Global Household, then review their enrollment history;
  - a. Should not add a client to a group enrollment if they are already enrolled in the same project as an individual.
  - b. The (+) will not appear or you will not find their name from the list of household members to add.

If users find that the client is already enrolled in the project as an individual, the HMIS Agency Administrator may contact the Help Desk requesting the enrollments be merged.

Frodo Baggins  
PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM: ESG FUNDED STREET OUTREACH PROJECT

Enrollment History Provide Services Assessments Goals Notes Files Forms X Exit

Program Service History LINK FROM HISTORY

1062 SAVE ACTIVE PROGRAM

Program Type: Group (2)  
Program Start Date: 10/01/2022  
Assigned Staff: Friendship Shelter Training Account  
Head of Household: Frodo Baggins

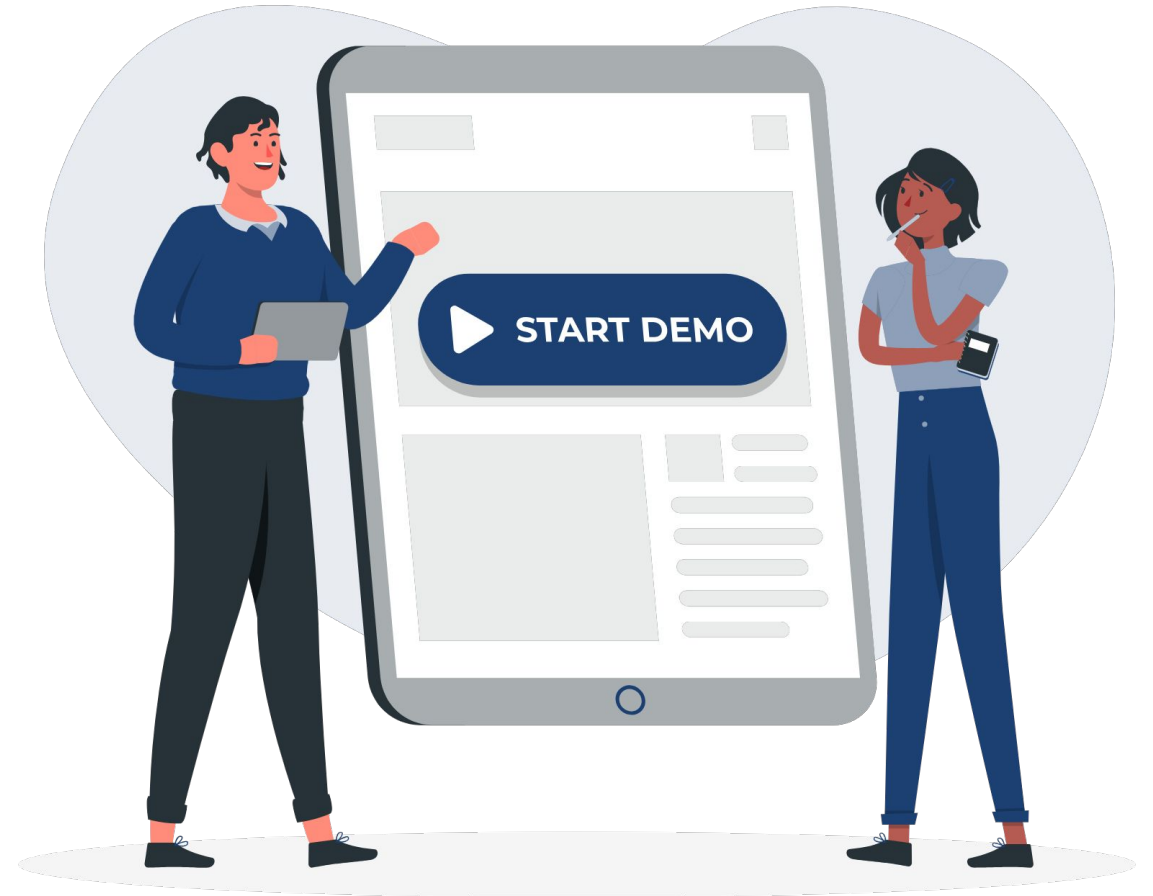
Program Group Members

Bilbo Baggins 10/01/2022 Active

ENROLLMENT HISTORY

Program Name	Start Date	End Date	Type
ESG Funded Street Outreach Project Street Outreach OC Training Agency	09/03/2025	Active	Individual

# Adding Individuals to Group Enrollments Demo



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