



HOMELESS SERVICES OVERSIGHT COUNCIL (HSOC) Data & Performance Committee Meeting Agenda

June 15, 2026, 10:00 am

Committee members must participate in person (except for just cause reasons, or personal emergency reasons approved by the HSOC)

**Room 356, County of San Luis Obispo Department of Social Services
3433 South Higuera St., San Luis Obispo, CA 93401**

Members with approved just cause reasons and the public may participate by Zoom video call:

<https://us06web.zoom.us/j/83996888464?pwd=MPRgT3a8d5HxQUwasQ6nX3TlCcHlfq.1>

Or dial in:

+1 669 444 9171

Meeting ID: 059861

Passcode: 839 9688 8464

1. Call to Order and Introductions (2 minutes*)
2. Public Comment (3 minutes*)
3. Consent: Approval of Minutes (2 minutes*)
4. Action/Information/Discussion
 - 4.1. Implementing Five-Year Plan Line of Effort 3 – Improve and Expand Data Management Efforts Through HMIS and Coordinated Entry System to Strengthen Data-Driven Operational Guidance and Strategic Oversight
 - 4.1.1. Homeless Management Information System (HMIS)
 - 4.1.1.1. Discussion Item: Data Quality Management Plan (20 minutes*)
 - 4.1.1.2. Action Item: Updated HMIS User Agreement (10 minutes*)
 - 4.1.1.3. Information Item: System Performance Measure (SPM) 7: Successful Placements to Permanent Housing (20 minutes*)
 - 4.1.1.4. Information Item: Quarterly Homelessness Dashboard Update (10 minutes*)



4.1.1.5. Information Item: Upcoming Institutes for Community Alliance (ICA) Site Visit (10 minutes*)

5. Future Discussion/Report Items (3 minutes*)
6. Next Regular Meeting: July 20, 2026
7. Adjournment

The full agenda packet for this meeting is available on the SLO County HSOC web page:
[https://www.slocounty.ca.gov/Departments/Social-Services/Homeless-Services/Homeless-Services-Oversight-Council-\(HSOC\).aspx](https://www.slocounty.ca.gov/Departments/Social-Services/Homeless-Services/Homeless-Services-Oversight-Council-(HSOC).aspx)

**HOMELESS SERVICES OVERSIGHT COUNCIL (HSOC)
DATA & PERFORMANCE COMMITTEE MEETING MINUTES**

Date

May 18, 2026

Time

10:00 am-11:11 am

Location

Room 356, Department of Social Services, 3433 S. Higuera St., San Luis Obispo, CA 93401

Members Present

Daniela Garcia (alternate for Jessica Thomas)
Devon McQuade
Emily Denton (alternate for Nathan Rubinoff)
Helene Finger
Mark Frauenheim
Mark Lamore
Ranel Porter

Staff and Guests

Abby Burgess
Alexis Ramirez
Berenice Andrade
Diana Howard
Erica Jaramillo
Jeff Al-Mashat
Jonathan Quake
Kate Bourne
Laurel Weir
Merlie Livermore
Thomas Crottogini

1. Call to Order and Introductions

Mark L. called the meeting to order at 10:00 am. Erica introduced Berenice Andrade as the new COC Administrative Coordinator. Introductions were also made by those present at the meeting.

2. Public Comment

There were no public comments presented.

3. Consent: Approval of Minutes

Helene moved to approve the minutes and Ranel seconded the motion. The minutes were approved by voice vote.

4. Action/Information/Discussion

4.1. Implementing Five-Year Plan Line of Effort 3 – Improve and Expand Data Management Efforts Through HMIS and Coordinated Entry System to Strengthen Data-Driven Operational Guidance and Strategic Oversight

4.1.1. Homeless Management Information System (HMIS)

4.1.1.1. Action Item: Approve Updated Privacy Documents

Kate reported that the only minor update is the addition of specific language regarding data sharing with the Veteran's Administration. This change allows detailed client information to be shared with the VA for their National By-Name List, with an opt-out option available for Veterans who do not wish to share their information.

Devon moved to approve the update, and Mark F. seconded. The motion passed via roll call.

4.1.1.2. Discussion Item: Review of Data Quality Management Plan and HMIS User Agreements

Kate presented draft documents for discussion and review prior to finalization and approval at the next meeting. She highlighted the HMIS End User Agreement language related to the use of AI tools, stating: 'Users will not input any client PII into AI software or use AI for decisions related to the provision of benefits.'

4.1.1.3. Discussion Item: System Performance Measure 5 (SPM 5)-Number of Persons Who Become Homeless for the First Time

Kate presented data for the County of San Luis Obispo Continuum of Care covering the reporting period from October 2025 through April 2026.

4.1.1.4. Discussion Item: Ad Hoc Goal Planning Work Group Update

4.1.1.5. Information Item: HMIS Staff Report

Laurel announced that Kari has left the County for another position. She also noted that the Program Review Specialist position currently held by Jonathan will be abolished by the end of June.

4.1.1.6. Information Item: Inflow and Outflow Data

Kate presented inflow and outflow metrics for March through April 2026. During this period, 503 clients had new enrollments in HMIS across all project types, including 121 clients in 90 households who were new to the system with no prior HMIS enrollments. In the same timeframe, 485 clients exited their enrollments, with 41 percent (202 of 485) exiting to permanent housing destinations.

5. Future Discussion/Report Items

- PIT count update

6. Next Regular Meeting: June 15, 2026

7. Adjournment

Mark L. adjourned the meeting at 11: 11 am.



COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF SOCIAL SERVICES
HOMELESS SERVICES DIVISION

HMIS Data Quality Management Plan

DQMP

Version Number 2

Status: Draft

Approvers: HSOC Data & Performance Committee

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DOCUMENT CONTROL

Change Log

Date	Changed By	Description	Reviewed by	Effective Date
12/11/2023	Abby Burgess, Zach Ehmann, Jessica Jones	Initial Version	HSOC Finance & Data	March 2024
8/26/2024	HMIS Lead Staff	Minor edits and addition of Appendix A	HSOC Data & Performance	January 2025
May 2026	HMIS Lead Staff			

Distribution List

[illegible]

INTRODUCTION

Purpose

The San Luis Obispo County CoC Data Quality Management Plan (DQMP) articulates the Continuum of Care (CoC) goal to continuously improve the completeness, timeliness, accuracy, and consistency of its data and establishes the policies and procedures for meeting this goal as a community. This document aims to provide all participating entities with a shared context for the plan and a clear understanding of their roles and responsibilities in its execution.

Administrative Scope

This document was expanded and updated as part of the implementation of the Clarity Human Services HMIS software and will contain the required information to maintain the HMIS after implementation.

CoC Data Systems

The CoC is required to gather information on all persons experiencing homelessness and all homeless service providers (sometimes called “Covered Homeless Organizations”) within their geographic jurisdiction. While the CoC is required to collect HMIS data elements using a single centralized database for federal reporting purposes and is charged with expanding its coverage, statutory and practical limitations introduce other systems of record into the CoC’s data ecosystem.

The sections below define the two types of databases that are subject to this DQMP. Collectively, these are referred to as the **CoC Data Systems**.

Homeless Management Information System

HMIS serves as the primary system of record for all State and Federally funded projects. Clarity Human Services is administered by San Luis Obispo County Homeless Services Division as the CoC’s designated HMIS Lead, and the software vendor is Bitfocus. The required structure and baseline functionality of the system is defined according to the [HMIS Data and Technical Standard Final Notice](#) (July 2004).

DV Comparable Databases

CoC-participating Victim Service Providers (VSPs) that are funded to serve survivors of domestic violence are prohibited from participating in the CoC’s designated HMIS and instead are required to utilize a “comparable database” that mirrors the capability of HMIS while complying with stricter privacy regulations. VSPs that receive HUD funding are still required to contribute to the CoC’s reporting through the provision of aggregate data and through limited client-permitted data sharing for service coordination. Requirements are documented in the [HMIS Comparable Database Manual](#).

COC, HMIS LEAD AND HMIS PROVIDER STAFFING

Roles and Responsibilities

List the key stakeholders involved in this procedure. For each stakeholder, specify their roles and responsibilities related to the Data Quality Plan. Clearly define any specific tasks or obligations they have.

Title	Description of Role	Tasks
HMIS Program Analyst	Management of HMIS Assigned initiative (PIT, etc.) and policy issues. Vendor management.	Oversight, review, and support of policy and procedures. Ensure adherence to data quality management plan, monitoring process and compliance.
Business Systems Analyst	Lead on system administration and data / reporting.	System Administration tasks. Ensure data quality reports are available and accurate. Create self-monitoring tools for data quality. Assist in identification and correction of data quality issues with HMIS Providers.
Implementation Partner	Provide subject matter expertise and technical assistance to Homeless Services Department and HMIS Team.	Understand data quality elements required by HUD and Federal Partner programs. Systematically monitor the data. Communicate regularly with CoC and HMIS Providers to ensure resources are available to address data quality concerns. Support creation of data quality management plan and subsequent tools/ reports to support the implementation of the plan.
HSOC Data and Performance Committee (or designated sub-committee for HMIS Data and Reporting functions)	HMIS Oversight	Review and approve data quality plan. Set data quality benchmarks. Review data quality reports. Determine expectations for monitoring and compliance. Work with providers and the HMIS lead to develop and implement solutions for improving data quality. Consider data quality in the rating and ranking process for funding decisions.

Agenda Item 4.1.1.1

HMIS Providers/ Participating Agencies	Adherence to HMIS policies and procedures, including the data quality management plan.	Set the tone for the agency's commitment to data quality. Monitor a project's data quality. Prepare for APR/ funding report requirements. Resolve any data quality findings as quickly as possible
HMIS Agency Administrator (s)	Serve as the primary contact (s) for all communications regarding the quality of data entered into CoC data systems.	Serve as a subject matter expert for the HMIS Provider. Support agency end users with system navigation and data quality. Ensure end users receive necessary training for HMIS. Maintain quality and accuracy of client data, user data and project information for the agency. Communicate project and funding updates and change to HMIS Lead, including changes to bed/ unit inventory. Review project set up requests and custom report request prior to submission to HMIS Lead.
HMIS End Users	HMIS Data Entry and adherence to HMIS policies and procedures, including the data quality management plan.	Enter data with completeness, accuracy, timeliness, and consistency.

HMIS DATA QUALITY RESOURCES

HUD's existing HMIS documentation and guidance serves as a key reference point for the CoC DQMP. The [HUD Exchange](#) links below provide access to the most recent versions of relevant documents considered in the formulation of the DQMP:

- [HMIS Data Standards](#) (*HMIS Data Dictionary & Data Standards Manual*, updated biannually)
- [CoC Data Quality Brief](#) (May 2017)
- [System Performance Improvement Briefs](#) (July 2017)
- [SNAPS Data TA Strategy to Improve Data and Performance](#) (September 2018)

HMIS DATA TYPES & CONVENTIONS

For the purposes of the DQMP, HMIS data elements are grouped into four types. Universal Data Elements (UDEs), Program Specific Data Elements (PSDEs), and Project Data Descriptor Elements (PDDEs), are designations derived from the [HUD Data Dictionary](#). “Administrative” data elements reflect measures of data quality that are derived from data system metadata and calculated performance metrics rather than a discrete field in a database.

Project Data Descriptor Elements (PDDEs)

The Project Descriptor Data Elements (PDDEs) contain basic information about projects in CoC data systems. PDDEs are the 'building blocks' of these systems, enabling the following functions:

- Marking project data for inclusion or exclusion for federal reporting;
- Association of client-level records with the various projects in which clients will enroll in across project types;
- Definition of the type of project with which the client is associated the entire time they received housing or services;
- Identification of federal partner programs providing funding to the project; and
- Documentation of bed and unit inventory and other information relevant for federal reporting and strategic planning related to system capacity and utilization.

PDDEs are entered and managed by CoC data system administrators in collaboration with each CHO. They are created at initial project setup within the data system and updated as changes occur to project or funding and are subject to annual review by data system administrators.

HUD requires that the CoC (typically via the data system Lead) collect project descriptor information for all continuum projects within its jurisdiction participating in CoC data systems by collecting and entering client-level HMIS data elements as well as all residential continuum projects, regardless of their participation in CoC data systems. If the databases include client and service data entered by non-continuum projects (e.g., food pantries or other services that might be used by people who are not experiencing homelessness), the continuum must identify them as such using the PDDEs to ensure that data are excluded from required reporting on continuum projects.

Universal Data Elements (UDEs)

The Universal Data Elements (UDEs) establish the minimum data collection requirements for all CHO projects entering data into CoC data systems, regardless of funding source. The Personally Identifiable Information (PII) and UDEs (3.01 through 3.07) must be collected once per client, regardless of how many project stays that client has in the system. The remaining UDEs (3.08 through 3.917) are to be collected at least once per project stay.

Program Specific Data Elements (PSDEs)

The Program Specific Data Elements (PSDEs) have been designed by HUD to allow projects that receive funding from any HMIS Federal partners. As such, requirements to collect specific PSDE's vary based on funding source and project type. The [HUD Exchange Federal Partners landing page](#) serves a gateway to the manuals that provide the specific PSDE data collection requirements per program and project type.

PSDEs, as defined by HUD, provide additional information about the characteristics of clients, the services they are provided, and program outcomes. Many of these data elements represent repeated transactions and were designed to collect information that may change over time. The "Common Program Specific Data Elements," which are the PSDEs that are collected across most Federal

Partner programs, are presented in the table below.

Administrative Data Quality Measures

This document defines "Administrative Data Quality Measures" as metrics derived from other HMIS elements that establish validity or describe the relationship between data captured in the CoC data systems and the overall amount of data available in the community it is charged with collecting.

- **Timeliness** refers to the number of days between when information was effective and when that information was entered into the CoC Data System.
- **Bed/Unit Coverage** refers to the percentage of non-VSP homeless-serving projects' residential capacity and utilization is captured in HMIS. It is a function of a project's overall HMIS-participation status. The CoC aims to have this be as close to 100% as possible.
- **Utilization** refers to the occupancy percentage for available units/beds in CoC residential projects. Overly high or low utilization may reflect issues with PDDE data that must be corrected by data system administrators.
- **User Metadata** are captured automatically by CoC Data Systems and are used to understand the patterns of system access and data entry for organizations.

Missing Data Responses to HMIS Elements

Required HMIS data elements left blank in CoC data systems are considered “missing” for data quality purposes. However, to distinguish between cases where data collection was not attempted or recorded and those where a client declined to provide the information, most required HMIS data elements provide the options “Client doesn’t know,” “Client prefers not to answer,” and/or “Data not collected” to be recorded in place of a blank value.

Although non-blank, these *may* have a negative impact on data quality.

It is not the intention of HUD, Federal Partners, or the San Luis Obispo County CoC that clients be denied assistance if they refuse or are unable to supply the information. However, some information may be required by projects or public or private funders to determine eligibility for housing or services or to assess service needs.

Usage of “Client Prefers Not to Answer” and “Client Doesn’t Know” Responses

These options are considered poor data quality but are provided to allow a response to be recorded for elements required to proceed with an assessment when a client is unwilling or unable to provide a response. These are never to be used in place of asking a client for information or in a situation where there was no opportunity to collect information. It is expected that service providers will attempt to collect responses to all required fields and develop rapport with clients to encourage responsiveness.

Usage of “Data Not Collected” Response

CoC data systems may require users to input a non-blank response for required HMIS data elements. In cases where information was not collected or is unknown to the end user entering the data, this response may be used. However, it is expected that this will be a last resort when information cannot be obtained through reference of other records or consulting the client.

Automatic Exits & Exit Destination Completeness in HMIS

Upon agency request and subject to existing policies and procedures, CoC HMIS system administrators may set up projects to automatically exit clients after a set number of days of non-activity. This approach is most often employed to reduce data entry burden and address Exit record timeliness issues for Street Outreach projects and Emergency Shelter projects utilizing a Night-by-Night workflow. However, their use comes with significant trade-offs for data quality: faulty exits may be created if contact/bed night services are not recorded in a timely manner, and all system-generated exits will have missing data for the Exit Destination element. At this time, there is no uniform requirement to utilize either an automated or manual workflow. CoC leadership reserves the right to approve or deny automation requests based on the expected impact to data quality.

Data Quality Standards

This section defines the data quality standards to which Participating Agencies and CoC Data System administrators are held accountable under the DQMP. The table below the next page shows the minimum benchmarks within each sub-component of the DQMP. In cases where sub-components encompass multiple data elements, the standard applies equally to each element rather than being an average of performance across elements. Sub-sections following this table provide additional information on these sub-components and procedural requirements that go beyond the data quality benchmarks listed.

Data Quality Benchmark Minimums by Project Type	CE	HP	ES (E/E)	ES (NbN)	PSH / OPH	RRH	SO¹	SSO	TH
Project Descriptor Data Elements (PDDEs) (Completeness)	95%	95%	95%	95%	95%	95%	95%	95%	95%
Completeness: Universal Data Elements (UDEs)	90%	90%	80%	80%	95%	95%	80%*	80%	90%
Completeness: Program Specific Data Elements (PSDEs)	90%	90%	80%	80%	95%	95%	80%*	80%	90%
Timeliness	95%	95%	95%	95%	95%	95%	95%	95%	95%
Accuracy	95%	95%	95%	95%	95%	95%	95%	95%	95%
Consistency²	95%	95%	95%	95%	95%	95%	95%	95%	95%
CoC Data System Bed/Unit Coverage: Federally Funded	N/A	N/A	100%	100%	100%	100%	N/A	N/A	100%
CoC Data System Bed/Unit Coverage: Non-Federally Funded	N/A	N/A	85%	85%	85%	85%	N/A	N/A	85%
Bed Utilization	N/A	N/A	65% - 105%	65% - 105%	85% - 105%	85% - 105%	N/A	N/A	65% - 105%

Project Type Key			
CE	Coordinated Entry	RRH	Rapid Re-housing
HP	Homelessness Prevention	SO	Street Outreach
ES (E/E; NbN)	Emergency Shelter (Entry/Exit workflow; Night-by-Night workflow)	SSO	Supportive Services Only
PSH / OPH	Permanent Supportive Housing / Other Permanent Housing	TH	Transitional Housing

Standards for Project Descriptor Data Elements (PDDEs)

As CHOs do not enter PDDE information directly, meeting PDDE benchmarks requires active participation in CoC Data System information gathering and monitoring processes. In

¹ For UDE & PSDE Completeness, only considers clients with a Date of Engagement in the period, indicating that the client has agreed to actively participate in case management services.

² Depending on the element, calculated based on either level of individual administrative events or agency users.

addition to responding to *ad hoc* requests for information in a timely manner, **CHO's are required to notify the CoC data system leads of any project and funding changes (including updates to bed/unit inventory) by the 5th business day of month immediately following the month the update/change occurs.** Updates and changes to PDDEs in HMIS can be communicated to the CoC HMIS System Administrator by submitting an (HMIS Project Set Up Form or Change Form TBD).

Standards for Client, Enrollment, & Assessment Data (UDEs & PSDEs)

In its [CoC Data Quality Brief](#), HUD identifies data quality for client, enrollment, and assessment data as having four components: completeness, timeliness, accuracy, and consistency. The tables below provides a brief overview of these components, whereas the following sections address the standards the DQMP applies to CHOs.

Completeness	Timeliness	Accuracy	Consistency
All clients entered	Data are entered soon after collection	Truthfulness from clients	Common interpretation of questions
Complete identifying data entered	Changing data are kept up to date	Accurate data entered by staff	Common interpretation of client answers
Complete characteristics fields entered		Logical discrepancies between data elements entered for the same client are minimized	Common knowledge of what fields are required
All required enrollment, service, assessment, and exit data entered			

Completeness

HUD's [CoC Data Quality Brief](#) defines data completeness as "The degree to which all required data is known and documented." For the purposes of the DQMP's standards, completeness is measured as the percentage of non-missing values for each non-administrative HMIS data element at each point of data collection.

The San Luis Obispo County CoC encourages all CHOs contributing to its data systems to aspire to 100% collection of all data elements but recognize that this may not be realistic or possible in all cases. To further support continuous data improvement in this area, the CoC has created minimum percentage requirements for data completeness, which apply equally to each element of the UDE and PSDE data types, respectively.

Timeliness

The San Luis Obispo County CoC encourages all participating agencies to aspire to 100% of data being entered into CoC Data Systems in a live and timely manner to facilitate HMIS being a tool for day-to-day business operations. However, the CoC recognizes that this may not be realistic or even possible in all cases, and therefore have created the following minimum requirements for data timeliness based on project type:

Project Type	Client Event	Timeliness Standard (time between event occurrence and data entry)
Coordinated Entry	Current Living Situation	Within 48 business hours of client contact/service
	Entry	Within 48 business hours of client contact/service
	Exit	Within 48 business hours of client contact/service
Homelessness Prevention	Entry	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service
Emergency Shelter (Entry Exit workflow)	Entry	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service
Emergency Shelter (Night-by-Night workflow)	Current Living Situation	Within 72 business hours of client contact/service
	Entry	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service ³
Permanent Supportive Housing / Other Permanent Housing	Entry	Within 72 business hours of client contact/service
	Move-in	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service
Rapid Re-housing	Entry	Within 72 business hours of client contact/service
	Move-in	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service
Street Outreach	Entry	Within 72 business hours of client contact/service
	Current Living Situation	Within 72 business hours of client contact/service
	Exit (completed or terminated program)	Within 72 business hours of client contact/service
	No-Contact Exits	After 90-days of no contact, project exit needs to be recorded by the end of the 93 rd day of no-contact.
Supportive Services Only	Entry	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service
Transitional Housing	Entry	Within 72 business hours of client contact/service
	Exit	Within 72 business hours of client contact/service

³ Users should back-date to the date of last shelter night stay, NOT the date the client did not return.

Accuracy

Data quality measures of accuracy consider the degree to which the information present in CoC Data Systems reflect the actual situations of clients. Data accuracy is not easy to manage or monitor, requiring reference to sources of documentation external to CoC Data Systems as well as regular auditing of responses in the data systems for internal logical congruence.

External Record Standard

To ensure accurate reporting of events, CoC leadership will cross-reference CoC Data System data against internal agency documentation as part of the annual HMIS monitoring process. **The goal is that 100% of client external agency records match the client's information entered into the CoC Data Systems, but a minimum of 95% is acceptable.**

Data System Correction Standard

Due to the complexity of data accuracy, specific standards have not been developed. Some amount of data incongruity may be unavoidable; however, CHO's should strive to minimize data incongruity that occurs. It is expected that CHO's will respond to requests to correct internal Data System accuracy errors within the timeframe parameters of the request. It is expected that accuracy corrections may be included as part of the quarterly Data Quality Monitoring process.

Known accuracy issues that may be included in cleanup requests will be updated in this plan after review of the new HMIS software system logics and common data quality issues.

Consistency

Data consistency means that data is understood, collected, and entered in the same way across all projects in CoC Data Systems. The CoC Lead will work with CoC Administrative Partners to ensure congruence across data systems, while CHO's are expected to meet the following standards by through their user management practices.

Initial User Training Standard

All CHO's data-contributing staff must complete an initial training prescribed by the CoC & HMIS Leads before being granted access to any of the CoC Data Systems. **It is expected that this training will be completed within 15 business days of assignment.**

Annual User Training Standard

For HMIS users, the CoC has established minimum annual HMIS training requirements.

User Activity Standard

End users must log into each CoC Data System to which they have access at least once in a 90-day period to maintain active user status. After 90-days of no use, the user account will be made inactive by the data system administrator.

CoC Data System Bed/Unit Coverage

Bed coverage is the number of homelessness services program beds in the CoC's geographic area that contribute data to the CoC Data Systems. The following project types are considered for this measure:

- Emergency Shelter (ES)
- Transitional Housing (TH)
- Rapid Re-Housing (RRH)
- Permanent Supportive Housing (PSH)
- Other Permanent Housing (OPH)⁴

As a lack of bed coverage limits the CoC's ability to evaluate its clients needs and project performance in addition to reducing the overall comprehensibility of its Data Systems, ensuring that bed coverage is as close to 100% is a high priority for CoC leadership. CoC leadership will focus on project types in the CoC that have less than 85% bed coverage for improvement efforts.

Bed Utilization

Utilization applies to residential (shelter and housing) projects and is measured as the percentage of project inventory that is being used to shelter/house a client in a given period. This measure not only serves to identify issues with client access to resources or bottlenecks in referral processes but also can serve as an indication of inaccurate or incomplete inventory or enrollment data.

The CoC acknowledges that the factors impacting utilization differ between project types and has set benchmarks accordingly. **Emergency Shelter & Transitional Housing projects are to maintain bed utilization between 65% - 105%. Permanent housing projects are to maintain bed utilization between 85% - 105%.**

Situations where a change in inventory records is necessary are defined by HUD in the [Data Standards Manual](#). Refer to the PDDE Data Quality Standards for the requirements for reporting inventory changes.

⁴ Includes "Housing without Services" and "Supportive Housing without Services" designations.

SELF-MONITORING TOOLS

CHOs are encouraged to self-monitor their data quality performance using reports available in the CoC Data Systems. This section details resources that are currently available for self-monitoring.

HUD Data Quality Report

The HMIS Lead recommends that CHOs run the HUD Data Quality Report to self-monitor **completeness** data quality for the [HMIS Universal Data Elements \(UDEs\)](#). Additionally, this report can be used to verify that enrollment data is up to date by comparing overall client counts against other data sources.

Documentation for running and interpreting this report can be found (future HelpScout Knowledge Base article) and technical specifications can be found within the [HUD Standard Reporting Terminology Glossary](#).

APR & CAPER Reports

The HMIS recommends that CHOs run the CoC / ESG APR and CAPER reports to self-monitor **completeness** data quality for the [Program Specific Data Elements \(PSDEs\)](#). The APR & CAPER reports also provide more detail for **accuracy verification** and **Entry/Exit timeliness monitoring** than the HUD Data Quality Report, including demographic breakouts, client resources and barriers, and program-specific performance measures (e.g., number of outreach contacts prior to engagement; days from enrollment to housing move-in).

EVA Reporting Tool

The HMIS Lead also recommends that HMIS Participating Agencies utilize HUD's Eva reporting tool to conduct a detailed review of errors. Instructions on where to find the Eva tool and how to run the report can be found at the San Luis Obispo HMIS Knowledge Base. HMIS Lead staff will periodically provide these reports to Agencies as part of ongoing data quality monitoring efforts described in the section below.

Report Library

HMIS provides a standard set of "canned" reports that can be used for data quality self-monitoring. These typically allow the user to select a series of parameters on a report setup page, may be run immediately or scheduled, and are easily exportable after running. Users and Administrators can visit the SLO HMIS Knowledge Base to review currently-available reports and their uses.

DATA QUALITY MONITORING PROCESSES

Routine data quality monitoring at the CoC, Agency, project, and user level will be conducted by the CoC HMIS Lead (in collaboration with Administrative Partners for non-HMIS systems) to ensure the CoC and meet the data quality goals defined in this DQMP. In response to findings from monitoring, the CoC HMIS Lead will request corrections and provide support to improve the quality of data at the point of entry into the CoC Data Systems.

The HMIS Lead will perform monthly data quality checks on the HMIS data, which will include the following steps:

- Run latest version of the HUD Eva Data Quality Tool
- Notify Partner Agency Administrator via email of findings and timelines for correction;
- Re-run reports for errant agencies/programs, as requested.
Follow up with Partner Agency Administrators if necessary;
- Notify Agency Executive Director if Partner Agency Administrators are not responsive to required corrective actions;
and
- Share aggregate Data Quality trends with HSOC Data & Performance

APPENDIX A: DATA QUALITY IMPROVEMENT PLAN

The HMIS Lead will conduct routine data quality monitoring on a monthly basis, as described in the Data Quality Management Plan. In-depth review will be conducted on a rotating basis with each Agency no less than every other year. Agencies will be notified in advance when they are selected for an in-depth review. Agencies that do not meet the CoC Data Quality metrics, may be asked to complete a Data Quality Improvement Plan. Below is the process the HMIS Lead staff will follow to assist an agency in meeting the CoC's Data Quality goals. The Improvement Plan will follow a 3-month timeline aimed at providing opportunities for quality improvement and tailored training to meet agency and end-user needs. Plans can focus on a single project type or multiple project types in an agency, depending on the extent of improvement needed and resource availability.

Preliminary analysis will be initiated with **Table 1** below. It will contain error rates found on the HUD Data Quality Report in HMIS for the 12 months preceding the Improvement Plan. Cells will be highlighted in red, representing data points beyond the maximum error limit. Additional detail will be provided on potential sources of the errors and corrections necessary.

Error Rate (Max)	Data Type	CE	ES EE	ES NBN	HP	PSH, OPH	RRH	SO	TH
5%	Personally Identifiable Information								
	Name								
	Social Security Number								
	Date of Birth								
	Race and Ethnicity								
	Gender								
5%	Universal Data Elements								

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	Veteran Status								
	Project Entry Date								
	Relationship to HoH								
	Client Location								
	Disabling Condition								

5%	Income and Housing Data Quality								
	Destination								
	Income and Sources at Start								
	Income and Sources at Annual Assessment								
	Income and Sources at Exit								

5%	Chronic Homelessness								
	ES, SH, Street Outreach								
	TH								
	PH								
	CE								
	SSO, Day Shelter, HP								

5%	Timeliness								
	Project Entry Records beyond 72 operating hours								
	Project Exit Records beyond 72 operating hours								

Table 1: A snapshot of the Participating Agency's data quality over the previous 12 months

Outline

If a Data Quality Improvement Plan is determined to be necessary, the HMIS Lead will follow the process below to identify areas for improvement and needed training. The HMIS Lead will determine these in partnership with the Participating Agency by forming a Data Quality Committee for the duration of the project. At the conclusion of the project, the Committee will determine if there has been sufficient improvement to conclude with a Final Report or to continue the effort. The Final Report will include action taken, error rates throughout the project, and feedback from the Participating Agency to the HMIS Lead.

Task ID	Task List	Community Task Lead	Target Date	Completion Date
1	Month 1: Goal: Assess Baseline of Compliance			
	Provide initial findings to the Agency Administrators and Agency Leadership	HMIS Lead		
	Agency staff identified to form a Data Quality Committee	HMIS Participating Agency		
	Begin correcting data in system for previous month (Month 0)	HMIS Participating Agency		
	Assess Training Needs and present Training Schedule/Plan	HMIS Lead		
2	Month 2: Goal: Implement Training and Support			
	Data Quality Reports for Months 0 and 1 Reviewed by DQ committee	DQ Committee Members		
	Correct Data in system for Month 1 and Month 0 as necessary	HMIS Participating Agency		
	Training Conducted	HMIS Lead		
	Month 3: Goal: Follow-Up Assessment			

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3	Data Quality Reports for Months 0, 1 and 2 Reviewed by DQ committee	DQ Committee Members		
	Correct Data in system for Months 0, 1, and 2 as necessary	HMIS Participating Agency		
	Complete Training Plan	HMIS Lead		
	Determine Need to Continue or Conclude Improvement Process	DQ Committee Members		
	Create Final Report of the Improvement Process	HMIS Lead		

DEFINITIONS AND ABBREVIATIONS

Term	Acronym	Definition
Coordinated Entry System	CE	CoC system used to identify persons experiencing homelessness, prioritize them for intervention, make referrals to housing projects, and monitor progress from homelessness to housing.
Continuum of Care	CoC	Federally-defined administrative entity that is composed of homeless serving organizations, administrators, and other stakeholders; charged with ending homelessness in their geographic jurisdiction.
CoC Data Systems	-	Term used in this document to refer collectively to the HMIS and DV Comparable, databases that are used to collect, store, and report on HMIS data elements for CoC purposes.
CoC Lead	-	Organization responsible for administering CoC operations; manages system-wide report submissions and the community's application for CoC funding. San Luis Obispo County is the CoC Lead.
Covered Homeless Organization	CHO	Any organization (including its employees, volunteers, affiliates, contractors, and associates) that records, uses or processes HMIS data elements for persons engaged by the CoC.
Data Quality	DQ	A measure of the validity and usefulness of data. Defined in this case as how accurately it

		portrays the conditions and operations of the CoC community.
Data Quality Improvement Plan	DQIP	Agreement between the CoC Lead and data-entering organization that establishes steps and benchmarks for data quality improvement for the data-entering organization.
Data Quality Management Plan	DQMP	The documented policies and procedures employed by a CoC to move toward its stated goals for data quality improvement and maintenance.
Department of Housing and Urban Development	HUD	Source of the majority of federal funding for CoC-participating organizations that establishes guidelines for HMIS data quality.
Domestic Violence	DV	Also called “inter-personal” or “intimate partner” violence, defined in this case as an experience of violence that qualifies a person for intervention from VAWA- and VOCA-funded entities.
DV HMIS Comparable Database	-	Database type required for DV-serving organizations (VSPs) funded by HUD as a substitute for participation in the CoC’s HMIS.
Homeless Management Information System	HMIS	Database structure established by HUD for the collection of homeless services data. HUD-funded CHOs are required to participate in their CoC’s HMIS, and the CoC is required to submit annual reports comprised of HMIS data elements.
HMIS Lead	-	CoC administrative entity charged with the operational management of the CoC’s HMIS

		software. San Luis Obispo County is the HMIS Lead.
HMIS Participation	-	When A project collects all required data elements according to funder requirements and local CoC Policies and Procedures within the CoC's designated HMIS implementation, or that data is submitted to the CoC's designated HMIS implementation at least once a year to cover the whole year of required client data collected by the project.
Universal Data Elements	UDEs	HMIS data elements pertinent to clients and service interventions that are required across HMIS, regardless of funding type and that are generally applicable across project types.
Program-Specific Data Elements	PSDEs	HMIS data elements pertinent to clients and service interventions that are required by specific funding sources or for specific project type configurations.
Project Descriptor Data Elements	PDDEs	HMIS data elements that pertain to organization and project setup, essential for establishing the framework of service interventions for HMIS data collection and reporting.
Victim Service Provider	VSP	Term for a VAWA- or VOCA-funded organization who has at least one project that is dedicated to serving persons who have experienced DV.

San Luis Obispo County CoC Homeless Management Information System End User Agreement

Agency Name: _____

User Name: _____

The San Luis Obispo County Continuum of Care (CoC) Homeless Management Information System (HMIS) is a secure database used to collect data on the housing and services provided to individuals and families experiencing homelessness and those at risk of homelessness. This agreement outlines the responsibilities you have as an HMIS user, to protect the confidentiality of all Personal Identifiable Information (PII) that you collect, enter, view or otherwise interact with.

An executed Agency Agreement with the San Luis Obispo Department of Social Services, Homeless Services Division must be in place with the organization that you represent before you are granted access to the database. You will only be assigned an HMIS User ID and password upon completion of all HMIS user training. All users must follow the San Luis Obispo County HMIS Policies and Procedures and comply with all relevant Federal and State confidentiality laws to protect client records.

Client Confidentiality and Informed Consent:

- Client consent must be obtained for each client whose data is to be shared in the San Luis Obispo County HMIS using the HMIS Release of Information
- Client consent may be revoked by that client at any time through a written notice to the participating agency
- No client may be denied services for failure to provide consent to share data in HMIS
- Clients have a right to inspect, copy and request changes to their HMIS records
- San Luis Obispo County HMIS Users may not share client data with individuals or agencies that do not have an HMIS Agency Agreement with the County without obtaining written permission from that client
- San Luis Obispo County HMIS Users will maintain HMIS data in such a way as to protect against revealing the identity of clients to unauthorized agencies, individuals, or entities
- Users will not input any Client PII into AI software or utilize AI for decisions concerning the provision of benefits
- Any San Luis Obispo County HMIS User found to be in violation of the San Luis Obispo County HMIS Policies and Procedures, or the points of client confidentiality in this User Agreement, may be denied access to the San Luis Obispo County HMIS

I affirm the following:

- 1) I have received training for the use of the San Luis Obispo County HMIS
- 2) I have read and will abide by all policies and procedures in the San Luis Obispo County HMIS Policies and Procedures Manual
- 3) I will maintain the confidentiality of client data in the San Luis Obispo County HMIS as outlined above and in the San Luis Obispo County CoC HMIS Policies and Procedures Manual
- 4) My HMIS User ID and password will be kept secure and will not be shared
- 5) If I suspect or encounter a security or other data breach, I will immediately notify my organization's HMIS Agency Administrator.
- 6) I will only collect, enter, and extract data in the San Luis Obispo County HMIS relevant to the delivery and coordination of services to people in housing crisis in San Luis Obispo County

User Signature

Date