Orange County

OC HMIS Part 2 Recertification

Please complete tasks 1 through 12 in order on the Clarity training site. You may log in with the training credentials provided by your Agency Administrator. If your Agency Administrator does not know their agency's log-in information for the Clarity training site, they should enter a ticket with the HMIS Help Desk.

When entering client information for this exercise, you may enter any false information you like unless otherwise specified. For this training, you will need to complete all of the tasks under the **OC Agency Training** agency in the Clarity training site.

Complete the following exercises. Make a note of the Unique Identifier for any client records created during the exercise, as this information will need to be sent to 211OC.

1. **Add a client record and complete a Release of Information for the client.** The Permission dropdown for the ROI should reflect that the client has agreed to share their data in HMIS.
2. **Add another client record and Release of Information.** The Permission dropdown for the ROI should reflect that the client has agreed to share their data in HMIS.
3. **Add Client 2 to Client 1's Global Household.** Ensure that Client 1 is the head of household.
4. **Enroll the household in Project 1.** Ensure that Client 1 is the group enrollment head of household. You may select any of the projects listed under the OC Training Agency. The Project Start Date for both clients should be 9/1/23.
5. **Complete a Status Assessment for Client 1 and Client 2 under their enrollments.**
6. **Complete an Annual Assessment for Client 1 and Client 2 under their enrollments.**
7. **Create a new client record.** The ROI section should reflect that the client has not consented to share their data in HMIS.
8. **Add Client 3 to the global household.**
9. **Enroll Client 3 into Project 1 (the same project you initially enrolled Client 1 and Client 2 into), and make sure Client 3 is in the same household as Clients 1 and 2.** The Project Start Date for Client 3 should be 9/15/23.
10. **Exit all 3 clients from the project.** The Project Exit Date should be 9/30/23.
11. **Enroll all three clients into a new project, Project 2, that is different from the previous enrollment they have.** The Project Start Date should be 10/1/23.
12. **Remove Client 1 from the Global Household on the Profile screen. Exit Client 1 from the project.** Client 2 and Client 3 should remain enrolled in the project. Client 2 should be the new Head of Household. The Project Exit Date for Client 1 should be 10/31/23.

Once the steps above have been completed, have your Agency Administrator submit the HMIS Part 2 Recertification Form to the HMIS Help Desk. In order to submit the form, the Agency Administrator will need the following information:

- Name and work email of user who took the test
- Client 1 ID
- Client 2 ID
- Client 3 ID
- Project 1 Name
- Project 2 Name