



**Get Connected. Get Help.™**

# Welcome!

October 2024  
OC HMIS User Meeting

JOURNEY 100 TO



# Agenda

1. HMIS Data Standards Change Process
2. HMIS Part 2 Recertification Update
3. Keeping Accounts Active in HMIS
4. Updated HMIS Consent Form
5. HMIS Account Update & Testing Form In Depth
6. HMIS Skills Test and HMIS Part 2 Recertification Test
7. Data Quality Report Review
8. CES Assessment Update
9. Project Performance Report
10. Data and Performance Management
11. Live HMIS Part 2 Training Course
12. Q&A
13. Office Hours

# HMIS Data Standards Change Process

## Community Support to Gather Feedback on Proposed Changes to HMIS Data Elements

- The HMIS Data Standards for Fiscal Year (FY) 2027 is starting to be updated.
- We are asking the community to provide any feedback on the HMIS Data Standards. If you have suggestions on adding options that aren't currently available in a data element or something that is missing in the Data Standards.
- Please send your suggestions to your agency administrator and they can submit a ticket to the HMIS Helpdesk. Please submit all proposed changes by May 31, 2025.

For additional information on the current data elements review the [HMIS Data Standards](#)



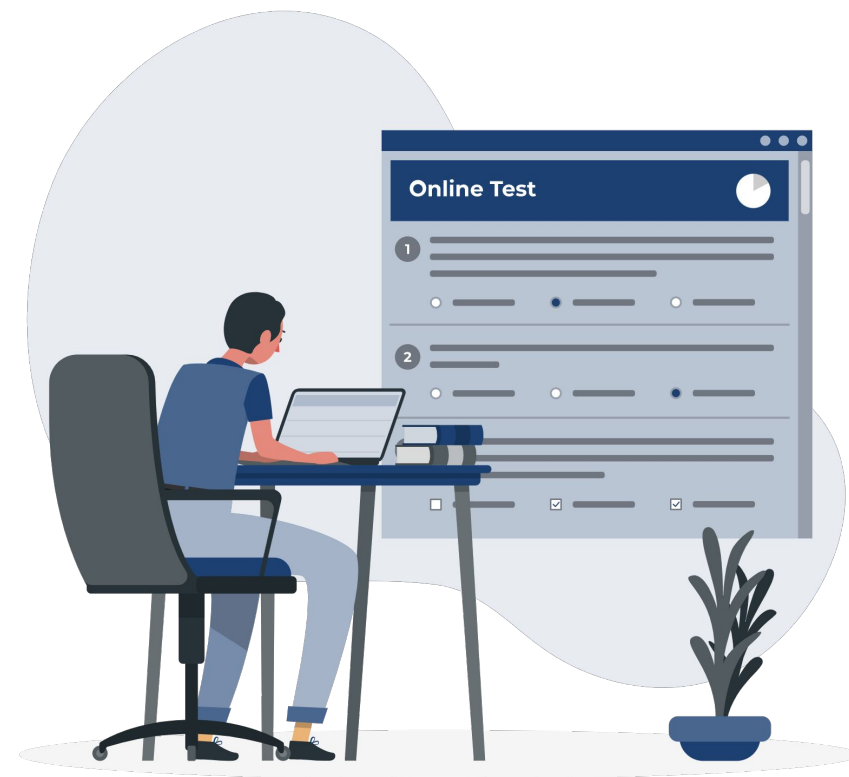
Graphic by: <https://storyset.com/online>

# HMIS Part 2 Recertification

The HMIS Part 2 Recertification is completed for 2024.

- Users that did not complete the test by September 20th had their HMIS accounts set to Inactive.
- If your HMIS account was set to Inactive you have until **October 11th** to complete the [HMIS Part 2 Recertification Test](#).

If you miss the October 11th deadline, you will need to retake the HMIS Part 1 and Part 2 Training courses in addition to the HMIS Skills Test. This only applies to users that were on the HMIS Part 2 Recertification list for 2024.



Graphic by: <https://storyset.com/online>

# Keeping Accounts Active in HMIS

The HMIS system will set user account to inactive if there is no activity in 60 days as a security measure. Users will receive an email notification prior to the 60 day mark asking the user to log into HMIS.

- If you don't use HMIS that frequently, set a calendar reminder to log into HMIS once a month to keep your account active.
- If you miss the deadline to log into HMIS before the 60th day, your account will be set to inactive and to have your account activated again you will need to retake the HMIS Part 1 and Part 2 Training courses in addition to the HMIS Skills Test.

The 60 day security measure also applies to the Training site for your agency. If the Training account is set to inactive, the HMIS Agency Administrator will need to submit an [HMIS Helpdesk ticket](#) so we can reactivate the account.



Dear [Name],

Your Orange County Clarity System account is scheduled to expire on 09/20/2024.

You last accessed your account on 07/22/2024. Please log in before 09/20/2024 to avoid de-activation.

Orange County Clarity System Team

Questions? Visit our online wiki: [help.bitfocus.com](http://help.bitfocus.com)



© 2024 Bitfocus, Inc., or its subsidiaries. All rights reserved.

Clarity Human Services is a product of Bitfocus.

548 Market St #60866, San Francisco, CA



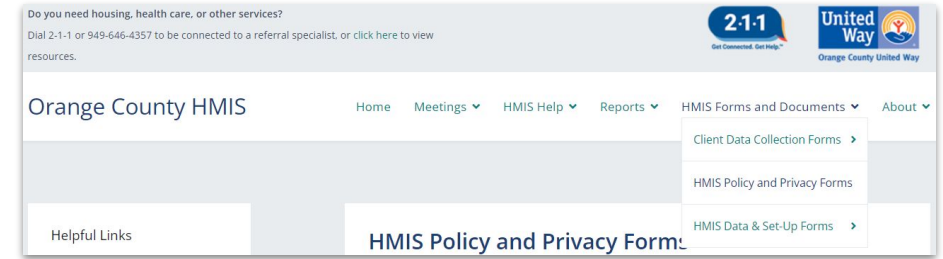
# Client Consent Form Update

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/>



Graphic by: <https://storvset.com/online>

# HMIS Account Update & Testing Form In-Depth

The [HMIS Account Update & Testing Form](#) is a multi-use form that HMIS Agency Admins can utilize to create new HMIS user accounts, or request updates to existing HMIS user accounts.

The HMIS Helpdesk will only accept and process account update & testing requests from certified Agency Admins.

This form can be found on our website by navigating to: [HMIS Forms and Documents](#) > [HMIS Data & Set-Up Forms](#) > [HMIS Account Update & Testing Form](#)



## HMIS Account Update & Testing Form

### Agency Information

Agency Name \*

Agency Administrator Name \*

Agency Administrator Email \*

List any other email addresses to send a notification when this account is created.

### ⊗ HMIS User 1

HMIS User's Full Name \*

HMIS User's Email Address \*

This HMIS User Is: \*

- A new HMIS User
- Completing HMIS training again due to inactivity
- An existing and active HMIS user who needs Agency Administrator access
- An existing and active HMIS user who needs access to the Individual Coordinated Entry System
- An existing and active HMIS user who needs access to the Family Coordinated Entry System
- An existing and active HMIS user who needs access to both Family and Individual Coordinated Entry Systems
- An existing and active HMIS user who needs access to my agency
- An existing and active HMIS user who needs a different access role (specify change of access role in comments)
- No longer employed by our agency
- No longer in need of access to HMIS as part of their primary job duties
- Other

Additional Comments:

+ Add HMIS User

Submit to OC HMIS Help Desk



# HMIS Account Update & Testing Form In-Depth (2)

Option	Descriptor
New HMIS user	Select this option when you need to create a new HMIS account for a staff member. The user must have already completed the prerequisite trainings for their role per the OC HMIS onboarding process
Completing HMIS training again due to inactivity	Select this option when users need to regain access to HMIS after an extended period of inactivity. The user must have already retaken HMIS Part 1+2 training courses, and the HMIS Part 2 Skills test
An existing and active HMIS user who needs a different access role (specify change of access role in comments)	Select this option if a user requires an updated access role within HMIS.
An existing and active HMIS user who needs access to my agency	Select this option if a user from outside your agency requires access to your agency for data entry/reporting purposes etc.
An existing and active HMIS user who needs Agency Administrator access	Select this option to elevate a regular staff member to the role of Agency Admin. The user must have already completed the Agency Admin training course prior to the account update request
An existing and active HMIS user who needs access to the Individual and/or Family Coordinated Entry System	Select this option to request CES access for a user. The user must have already completed the CES training course prior to the account update request. CES requests are subject to approval by the CES Leads.
No longer employed by our agency/ No longer in need of access to HMIS as part of their primary job duties	Select this option to remove a user's access to HMIS. This should occur if a user is no longer employed at your agency, or if their primary job duties no longer require HMIS access.



# HMIS Skills Test and HMIS Part 2 Recertification Test

The HMIS Skills Test should be used for new users or inactive users that need to create or reactivate their HMIS account again.

The HMIS Part 2 Recertification Test should only be used during the yearly recertification. The form will have an embedded link to the test instructions.

Although they both list similarities, inputting the incorrect information can lead to incorrect scores. We want to make sure we avoid this by using the correct form.

When you are finished, you will need to provide the following information to your Agency Administrator. Please make note of the following as you complete the HMIS Skills Test:

- Username you used in the Clarity Training Site:
- Client 1 Unique ID and Fake Name
- Client 2 Unique ID and Fake Name
- Client 3 Unique ID and Fake Name
- Project 1 Name
- Project 2 Name
- Date on which the test was completed
- PDF Attachment of the Program Roster Report



## 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.

Graphic by: <https://storvset.com/online>

# Data Quality Report Review

Data Quality Report Card draft data and LSA data will be uploaded into DropBox for review the week of Oct 7th.

Data Quality Report Card: 07/01/2024 - 09/30/2024

LSA Reports: 10/01/2023 - 09/30/24

## Common LSA Errors and Warnings:

- Issues with relationship to Head of Household
- Error with start date, exit date and bed nights
- Overlapping program enrollments
- Bed Inventory
- Utilization
- Length of Stay

Error/ Warning	Description	Action Required from AAs
Highlighted in orange: Client Doesn't Know / Client Prefers Not to Answer	Responses with <i>Client doesn't know</i> or <i>Client Prefers Not to Answer</i>	Confirm that the value entered in HMIS corresponds with the information provided by the client
Highlighted in gray: Information Missing	Responses with <i>Data not Collected</i> or <i>Blanks</i>	Complete missing information if possible
Highlighted in magenta: Data Accuracy Issues	Responses that constitute Data Accuracy Issues	Correct the appropriate field in HMIS



Graphic by: <https://storyset.com/online>

# CES Assessment Updates

## HOUSING INTEREST INFORMATION

PLEASE SELECT WHICH OF THE FOLLOWING TYPES OF HOUSING OPPORTUNITIES YOU ARE INTERESTED IN. GENERAL DESCRIPTIONS OF EACH HOUSING TYPE ARE LISTED BELOW TO HELP GUIDE YOUR DECISION.

YOU MAY SELECT UP TO THREE, AND YOU WILL ONLY BE CONSIDERED FOR THE TYPES YOU SELECT.

Rapid Re-Housing

TIME LIMITED RENTAL ASSISTANCE OF VARYING LENGTHS:

SHORT-TERM UP TO 6 MONTHS

MEDIUM-TERM UP TO 12 MONTHS

LONG-TERM UP TO 24 MONTHS

TIME LIMITED SUPPORTIVE SERVICES

THERE IS NO MINIMUM INCOME REQUIREMENT FOR PARTICIPATING IN RRH. PARTICIPANTS WILL PAY THE FULL RENT AFTER THE ASSISTANCE ENDS.

THE GOAL OF RRH IS TO HELP HOUSEHOLDS INCREASE OR MAINTAIN INCOME TO BE ABLE TO KEEP PAYING RENT AFTER THE RENTAL ASSISTANCE ENDS.

Housing Choice Voucher

ONGOING RENTAL ASSISTANCE

MINIMAL TO NO SUPPORTIVE SERVICES

INCOME REQUIREMENTS VARY. THERE MAY BE A REQUIRED FINANCIAL CONTRIBUTION FROM THE PARTICIPANT, BASED ON ANY INCOME THE PARTICIPANT HAS.

THE GOAL OF THE HCV PROGRAM IS TO HELP THE HOUSEHOLDS WITHOUT SUFFICIENT INCOME TO SUSTAIN HOUSING WITHOUT ASSISTANCE OBTAIN HOUSING.

Permanent Supportive Housing

ONGOING RENTAL ASSISTANCE

ONGOING VOLUNTARY SUPPORTIVE SERVICES

INCOME REQUIREMENTS VARY. THERE MAY BE A REQUIRED FINANCIAL CONTRIBUTION FROM THE PARTICIPANT BASED ON ANY INCOME THE PARTICIPANT HAS.

THE GOAL OF PSH IS TO HELP HOUSEHOLDS THAT FACE GREATER BARRIERS, TYPICALLY HOUSEHOLDS EXPERIENCING CHRONIC HOMELESSNESS, OBTAIN AND KEEP AFFORDABLE HOUSING.

## ACCESSIBILITY NEEDS

IF YOU, OR ANYONE IN YOUR HOUSEHOLD, HAVE A DISABILITY, YOU MAY NEED ACCESSIBLE HOUSING. THIS MAY MEAN YOU NEED RAMPS OR WIDER ENTRANCES, SPACE FOR MEDICAL EQUIPMENT OR A WHEELCHAIR, OR SPECIAL LIGHT SWITCHES, ELECTRICAL OUTLETS, AND OTHER FIXTURES.

THESE QUESTIONS ARE ABOUT SOME COMMON NEEDS. IF YOU HAVE NEEDS NOT COVERED BY THESE QUESTIONS, PLEASE LIST THEM AT THE END OF THE ASSESSMENT.

Do you require a mobility accessible unit due to a physical disability?

Do you require a sensory accessible unit due to loss of hearing or sight?

Do you require some accommodations but not all the features of an accessible unit?

Is there anything else about your accessibility needs that we should know?

SELECTING THE PRIVATE CHECKBOX MEANS ONLY USERS WITH ACCESS TO THE CURRENTLY SELECTED AGENCY WILL BE ABLE TO SEE THIS ASSESSMENT.

Private

SAVE

CANCEL

[Family CES Housing Needs Assessment](#)  
[Individual CES Housing Needs Assessment](#)

2.1.1

Get Connected. Get Help.™

JOURNEY 

United Way   
Orange County United Way

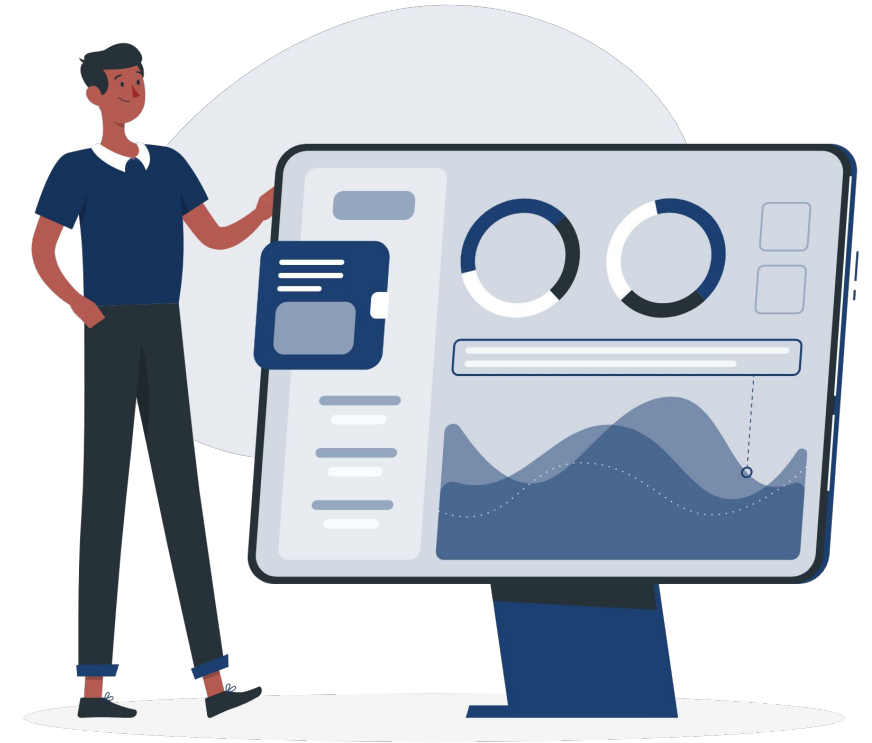
# Project Performance Reports

The Project Performance Report (PPR) for Permanent Supportive Housing (PSH) will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found at on [our website](#) by navigating to:

[Reports](#) > [Project Performance Reports](#)

Corrections for the Rapid Re-Housing PPR draft data have already been uploaded into DropBox

The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



Graphic by: <https://storyset.com/online>

# Data and Performance Management Meeting

## Reminder

The meeting will be held on  
Wednesday, November 13, 2024  
10am – 11am

Click [here](#) to Join!  
Meeting ID: 857 7837 0017  
Passcode: 463529

In our November user meeting we will provide more details about the meeting agenda.

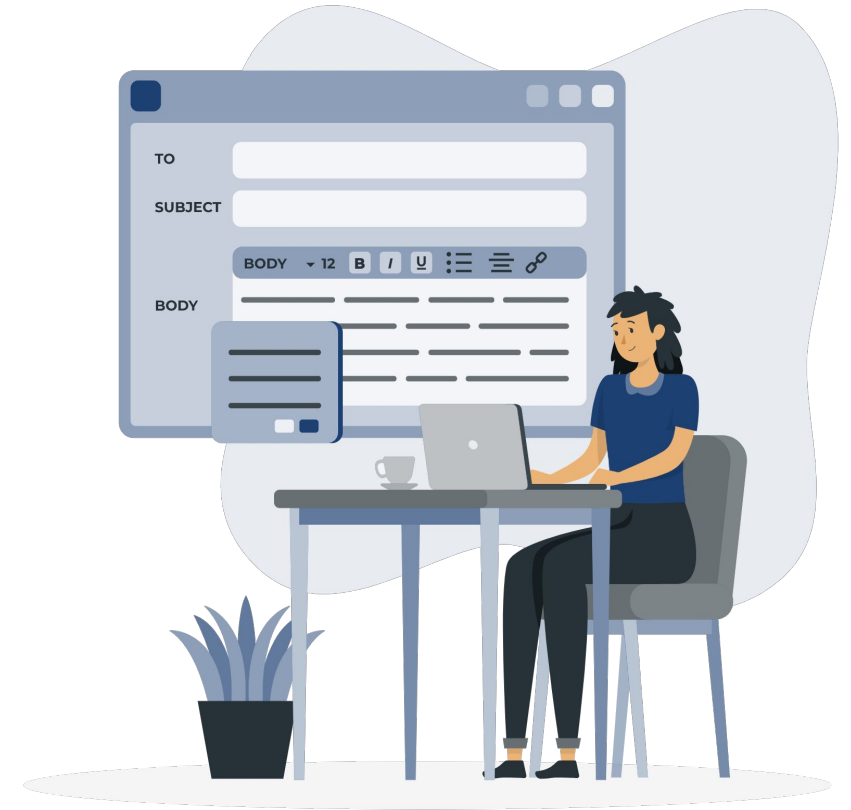


Graphic by: <https://storyset.com/online>

# Live HMIS Part 2 Training Course

The HMIS Helpdesk Team will be hosting a Live HMIS Part 2 Training Course session on Wednesday, October 30th, 2024 at 10am.

A reminder newsletter with more details will be sent out the week of the training.



Graphic by: <https://storyset.com/online>

# Q&A

**Reminder: Please enter your agency name in the chat box for attendance**



Thank you  
Have a great day!

Next User Meeting: Nov 6th







Throughout 2024, Orange County United Way is celebrating 100 years of impact in our community. We invite you to join us on our year-long Journey to 100 centennial celebration as we prepare for another century of caring for each other The OC Way. Learn more and see how you can get involved.

[UnitedWayOC.org/Journey-to-100](https://UnitedWayOC.org/Journey-to-100)