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Welcome!

March 2025
OC HMIS User Meeting

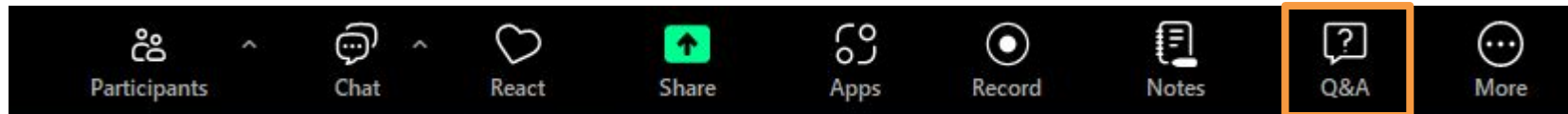


Agenda

1. HMIS Participating Agencies Schedule
2. HIC PIT Reminder
3. Ticket Submissions
4. Grievance Process
5. Data Collection and Release of Information
6. Report Highlight: Data Accuracy Dashboard
7. Inactive User Training Process
8. Data Entry Guidance
9. HMIS Interface Focus Group
10. UCI Agency Interviews Request
11. Training and Resources
12. Project Performance Report
13. Survey
14. Holiday
15. Q&A
16. Office Hours

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

Q&A



To better organize questions the HMIS Helpdesk 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 Helpdesk ticket submission, so our Team is able to further investigate and provide assistance for your request.

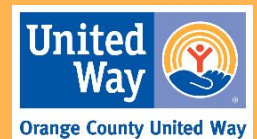
HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule



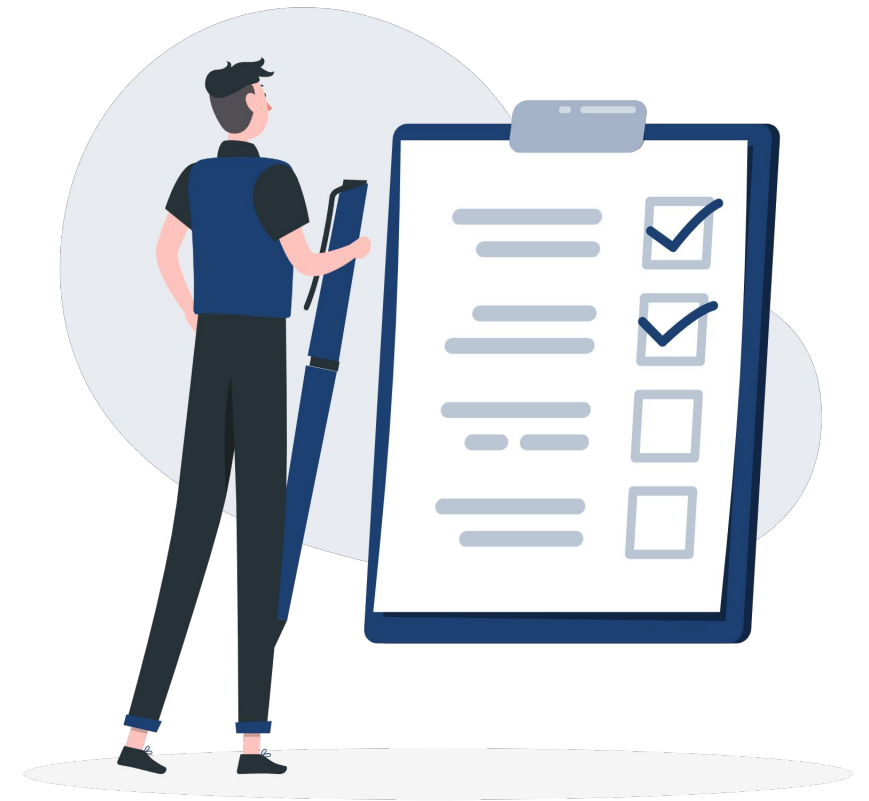
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March												
	Longitudinal Systems Analysis (LSA)	October	December	January	April												
	Housing Inventory Count (HIC)	January	February	April	May												
	Sheltered Point in Time (PIT)	January	February	April	May												
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January												
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December												
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November												
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September												
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October												
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November												
Orange County Requirement	Agency Audits	June	Specific to each agency	n/a	n/a												
	HMIS User Recertifications	July	August	n/a	n/a												
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Wednesday @ 10:00	n/a	n/a	n/a												

[HMIS Participating Agency Schedule](#)



HMIS Participating Agencies Schedule

- System Performance Measures Report (SPM) - Estimated HUD Due Date in March
 - **Pending Updates from HUD**
- Housing Inventory Count (HIC) - Estimated Agency Due Date in February
 - **Submission Due Date: February 13th**
 - **Final Review: March 28th**
- Sheltered Point in Time (PIT) - Estimated Agency Due Date in February
 - **Submission Due Date: February 13th**
 - **Final Review: March 28th**



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HMIS Participating Agencies Schedule

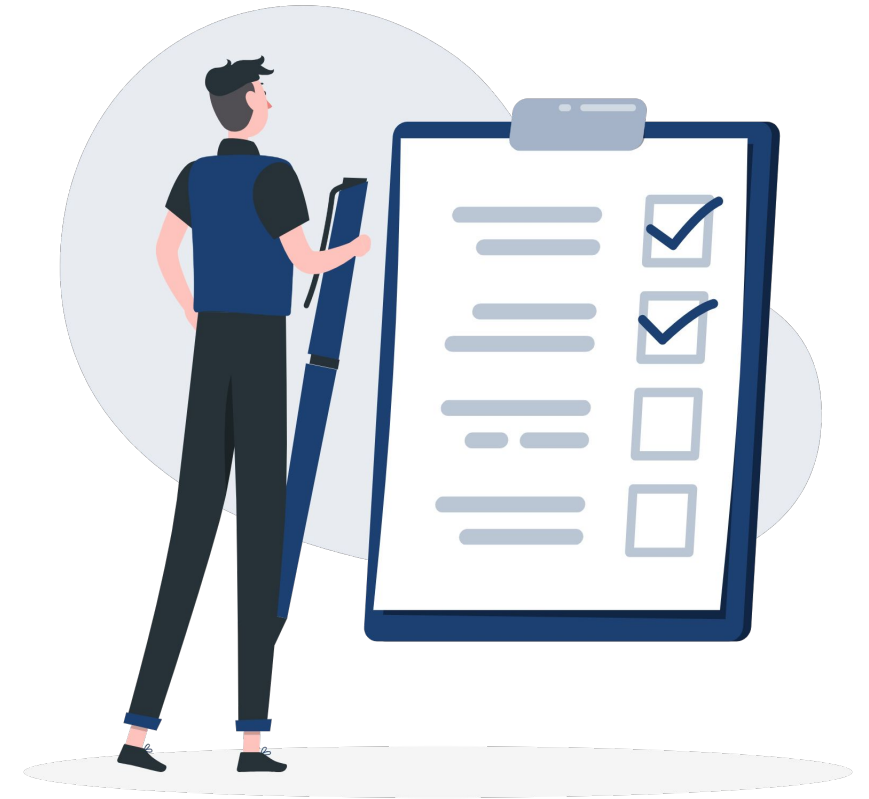
Updated Reporting Period to support FY2025 CoC Application Timeline

PPR Corrections are due March 19th

- Permanent Supportive Housing: 2/1/24 – 1/31/25
- Rapid Re-Housing: 3/1/24 – 2/28/25
- Transitional Housing: 3/1/24 – 2/28/25

Data Quality Report Card Corrections are due April 18th

- Average DQ Measure: 1/1/25 – 3/31/25



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2025 HIC and Sheltered PIT

Agencies with any of the following project types are required to participate in the reporting, whether or not the projects are in HMIS:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

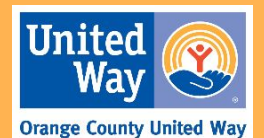
For additional information and to access the training materials, please review the [2025 HIC and Sheltered PIT](#) knowledge base article.



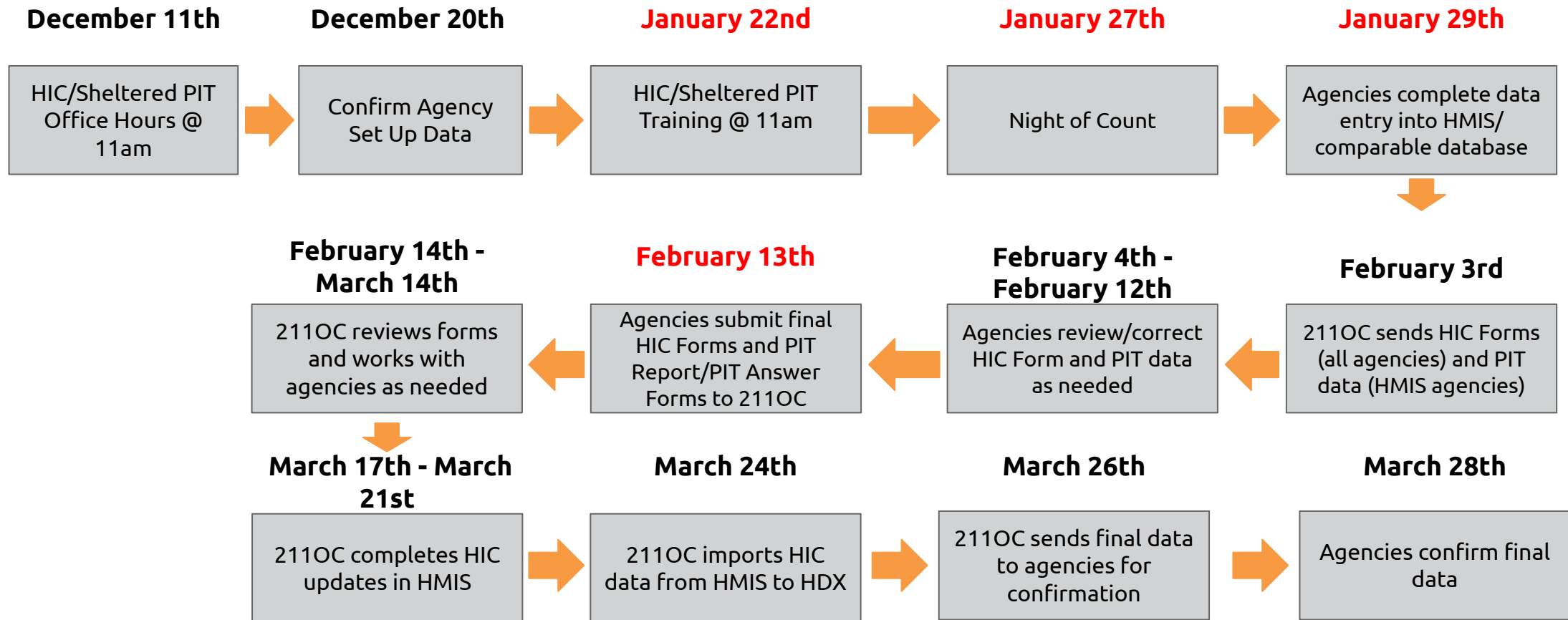
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2025 HIC and Sheltered PIT Timeline



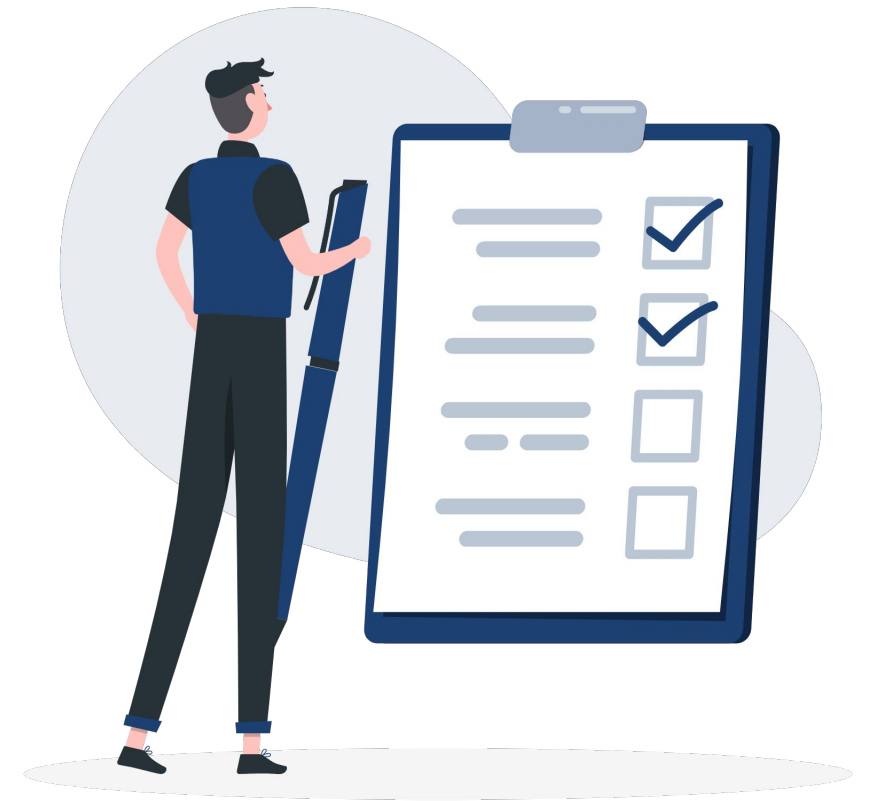
Ticket Submission P&Ps

The HMIS Helpdesk has seen an increase in ticket submissions by non-HMIS Agency Administrator staff.

Agency Staff should not submit tickets or Account Update Forms.

All contact with the Help Desk must be via the HMIS Agency Administrator (AA).

Tickets or Account Update Forms submitted by non-HMIS Agency Administrators will be closed and redirected to the agency's AA(s).



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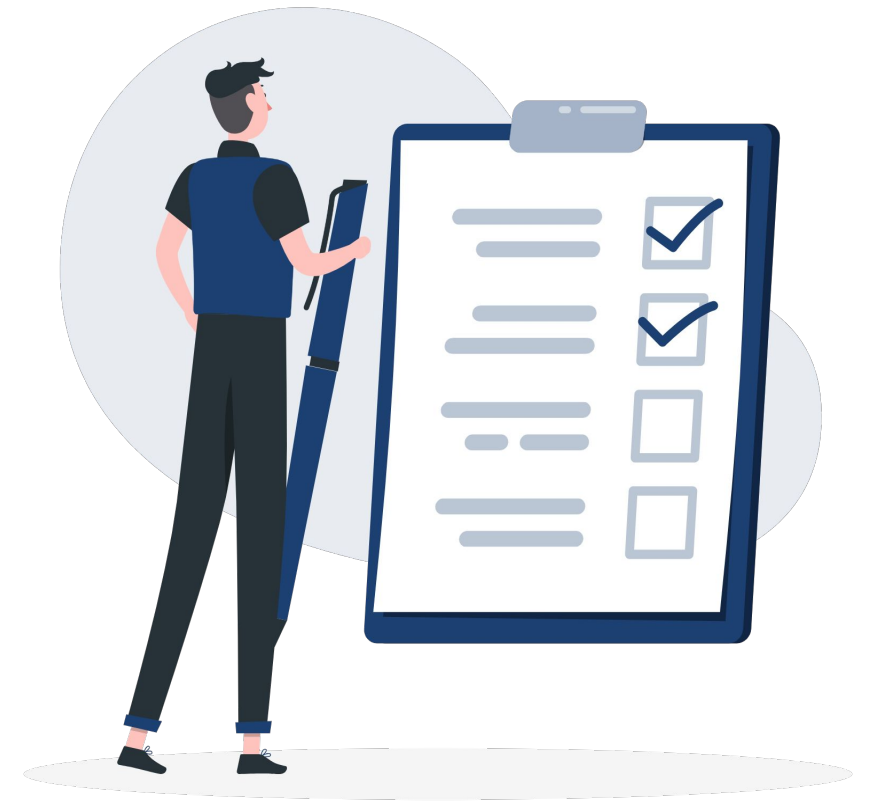
Ticket Submission P&Ps

A gentle reminder...

Agency Administrators are encouraged to create a [HappyFox account](#) to submit and track ticket responses.

Please avoid submitting multiple tickets for an ongoing issue but reply back on the existing ticket.

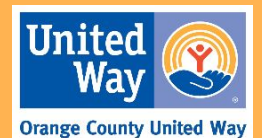
If a ticket is closed before an issue is fully resolved, AAs can reply to reopen the ticket and request additional support.



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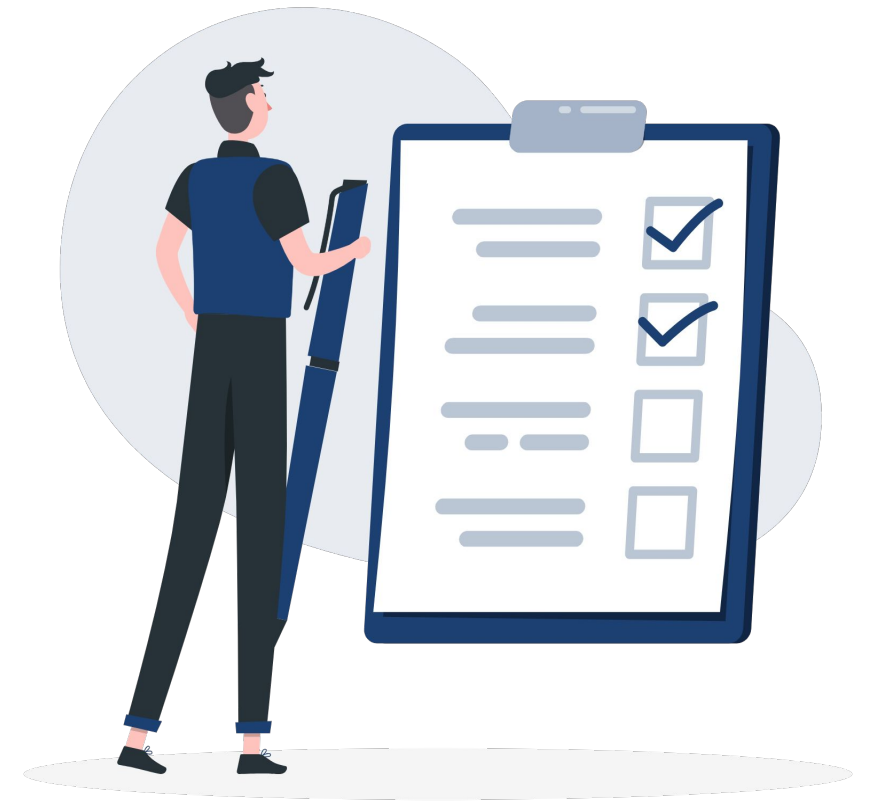
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Ticket Submission P&Ps

Agency admins can select from the following ticket categories:

- **Agency or Project Setup** - Request to set up a new project, or questions about a project setup
- **Client Record Merges** - Request to merge duplicate client profiles, or questions about profile merges
- **Client Record Request** - Use when a client requests their HMIS record, use UID for identification, no PPI.
- **Feedback** - Use to respond to HMIS surveys, or for other community feedback initiatives



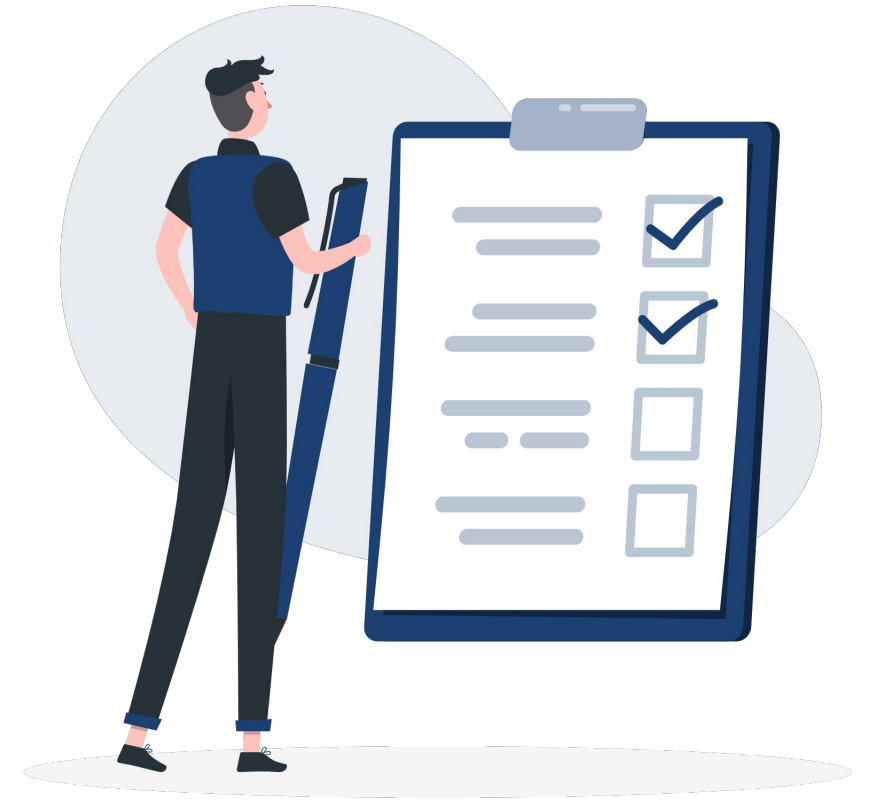
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Ticket Submission P&Ps

- **HMIS Functionality Issues** - Use for troubleshooting HMIS errors staff members encounter
- **Reports (including repository exports and corrections)** - Request new reports, or to provide updates/corrections to existing reports; Use for questions about *LSA*, *SPM*, *HIC/PIT*, *DQRC* and *PPR*
- **Users and Trainings** - Requests to reset trainings courses, or for questions/issues encountered about the user onboarding process



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HMIS Grievance Process

A friendly reminder that agencies must provide clients with the [HMIS Grievance Form](#) and outline grievance policies during intake.

Both the agency and the HMIS grievance forms should be available for the client to access without having to request a copy.

The HMIS Grievance Form can be completed by the client if they believe that their data has been used in a manner that they disagree with or violates their rights.

The client must file a grievance with the agency of concern prior to completing the HMIS Grievance Form.



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Data Collection & Release of Information

HMIS users are required to collect Universal Data Elements about all clients who participate in HMIS, regardless of funding source.

HMIS users must take steps to ensure that data collection practices are easy for clients to understand by providing them with a copy of OC HMIS' [Privacy Notice](#) during intake and upon request.

Agencies should post/share [Privacy Notice](#) wherever client intake occurs.



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Data Collection & Release of Information

During intake, the agency asks clients for their consent to share PPI data in HMIS via the [Consent to Share Protected Personal Information](#) form.

Clients have a right to privacy, and can refuse to sign the Consent to Share PPI Form without being denied service.

For the following demo, we will go through the profile privatization and anonymization process.

Review the [Accessing and Completing Release of Information \(ROI\) Page](#) and [Refusing/Revoking Consent](#) Knowledge Base Articles for an outline of these procedures.



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Data Collection & Release of Information DEMO



Data Accuracy Dashboard

The *Data Accuracy Dashboard* is a report made available for HMIS Users to provide a broad overview of the accuracy of their agency's HMIS data. The dashboard can be filtered by:

- Reporting Period
- Project Type
- Project Name

Agency Admins should review the *Data Accuracy Dashboard* once per month for all projects at their agency to assess the accuracy of their HMIS data. The dashboard information should be shared with relevant staff members for further review and verification of client information entered into HMIS. Any dashboard information that does not reflect real client information should be corrected by the relevant staff member.

Agency Admins can locate the *Data Accuracy Dashboard* in Clarity by navigating to:
reports > data analysis > orange county clarity system reports > data quality > data accuracy dashboard

Data Accuracy Dashboard

DEMO



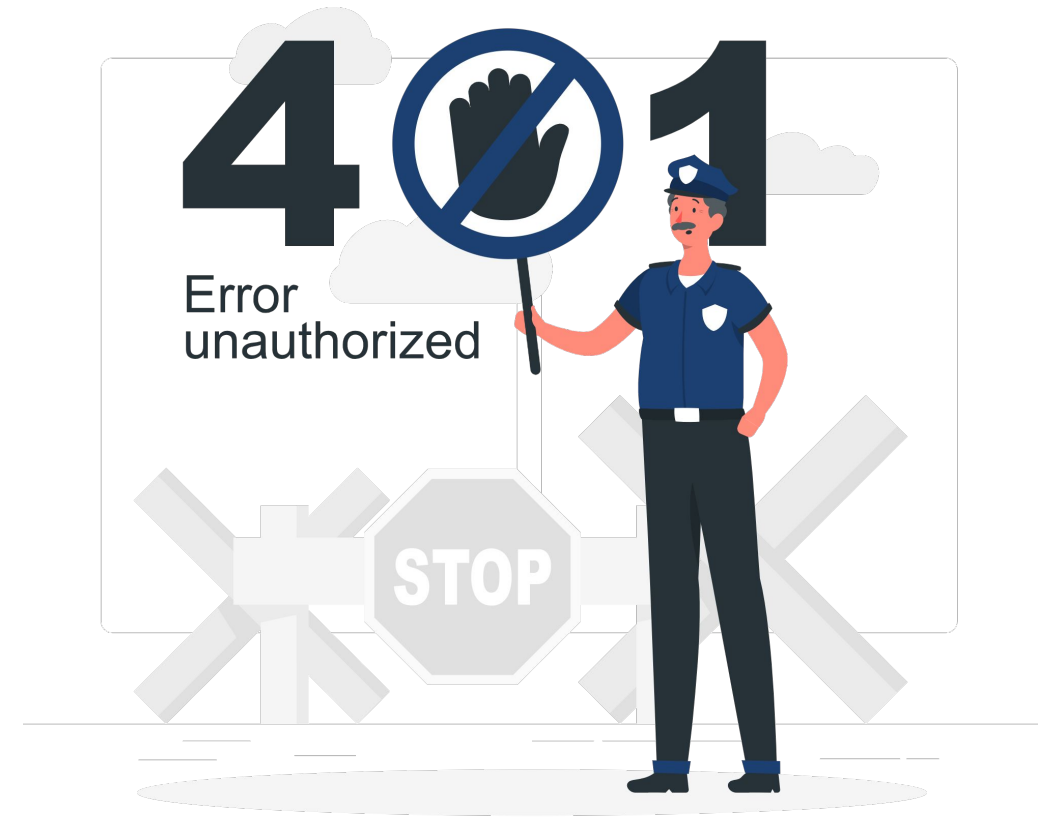
HMIS User Inactivity and Training

Clarity automatically locks user accounts after a period of inactivity of **more than 60 days**. Users typically receive a notification two (2) calendar days prior to their account becoming locked. Users should set a calendar reminder to prompt them to login once per month.

Once an account is locked, an Agency Admin will need to submit a ticket to the HMIS Helpdesk to reset that user's training materials for later reactivation.

Inactive users will need to retake the following training courses/materials before account reactivation:

- [HMIS Part 1](#)
- [HMIS Part 2](#)
- [HMIS Skills Test](#)



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Data Entry Guidance

Data Quality Components:

- **Data Timeliness:** It is important to enter data in a timely manner because it ensures data recorded in HMIS reflects the most current information on the clients served.
- **Data Completeness:** It ensures data recorded in HMIS represents the population served comprehensively.
- **Data Accuracy:** It ensures the reliability and validity of the information recorded in HMIS
- **Data Consistency:** It is important to have the same understanding of the clients' information and the way it is collected in order to have accuracy. In other words, data consistency is a prerequisite in order to achieve data accuracy.



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Goal 11 - Receive Referrals from the Coordinated Entry System

Permanent Housing and CoC/ESG funded projects should be receiving referrals from the Coordinated Entry System to ensure that the highest priority clients are receiving the housing resources they need to end their homelessness.

Applicable Project Types & Targets:

- Rapid Re-Housing (RRH): = 100%
- Permanent Supportive Housing (PSH-OPH): = 100%

Universe: Heads of households with a Project Start Date during the reporting period

Clients entering from the following locations are excluded from this measure:

- Rental by client, with RRH or equivalent subsidy
- Permanent housing (other than RRH) for formerly homeless persons

$$\text{Goal 11} = \frac{\text{Completed Referrals}}{\text{Number of New Enrollments}}$$

Goal 11 - Completed Referrals


Type Referrals

Coordinated Entry Clear SEARCH

Service Name	Start Date	End Date
Referral: CoC Funded Rapid Re-Housing Training ... County of Orange referral to OC Training Agency ⓘ	08/06/2024	08/06/2024

Program Service Referral Reservation Assessment Events

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Individual Coordinated Entry System Coordinated Entry County of Orange ⓘ	08/06/2024	Active	Individual
CoC Funded Permanent Supportive Housing Train... PH - Permanent Supportive Housing (disability required for entry) OC Training Agency ⓘ	08/06/2024	Active	Individual 

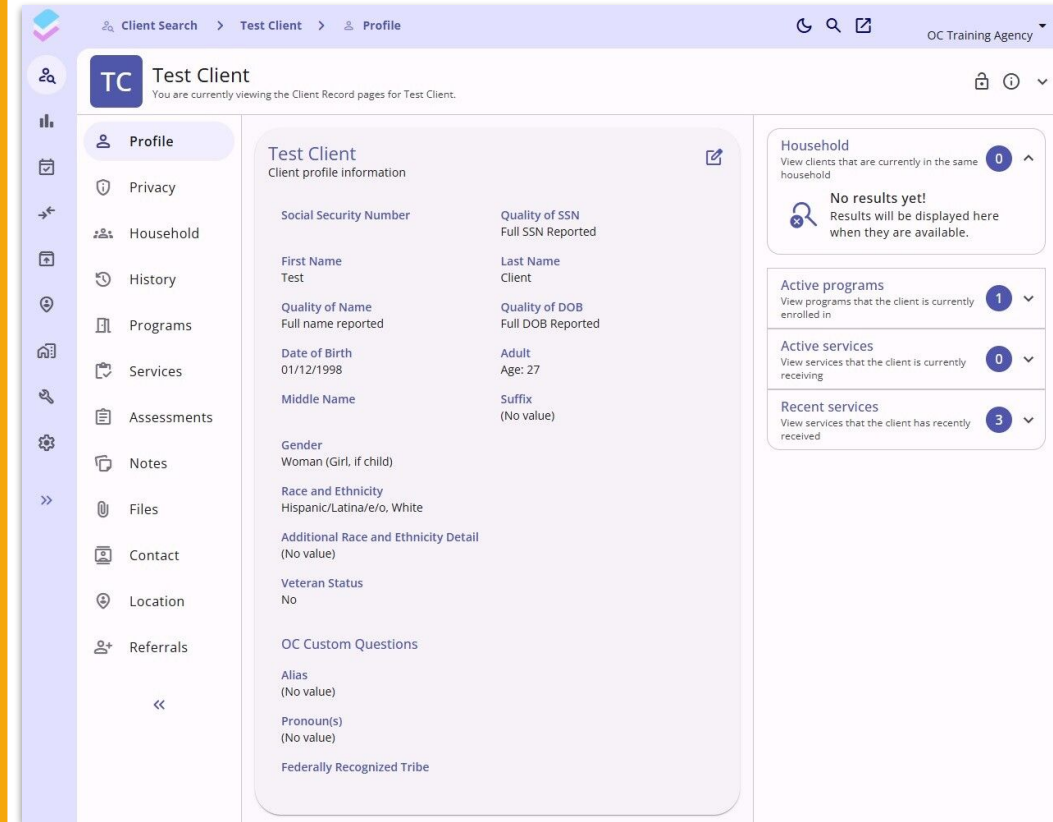
Goal 11 - Receive Referrals from the Coordinated Entry System

DEMO



HMIS Interface Focus Group

- 211OC would like to request users to join our Focus Group to test out our new Clarity Interface.
- We ask that users submit a ticket using the “feedback” category and let us know if you are interested in participating in the HMIS Interface Focus group.



UCI Agency Interviews Request

UCI would like to conduct 30-minute to 1 hour interviews with agency representatives who can speak to their organization's role, challenges, and successes in addressing homelessness.

- Participation from agencies involved in HMIS to share insights on service provision, policy effectiveness, and gaps in homelessness response in Orange County.

Please email Justin Soto, jdsoto1@uci.edu for scheduling

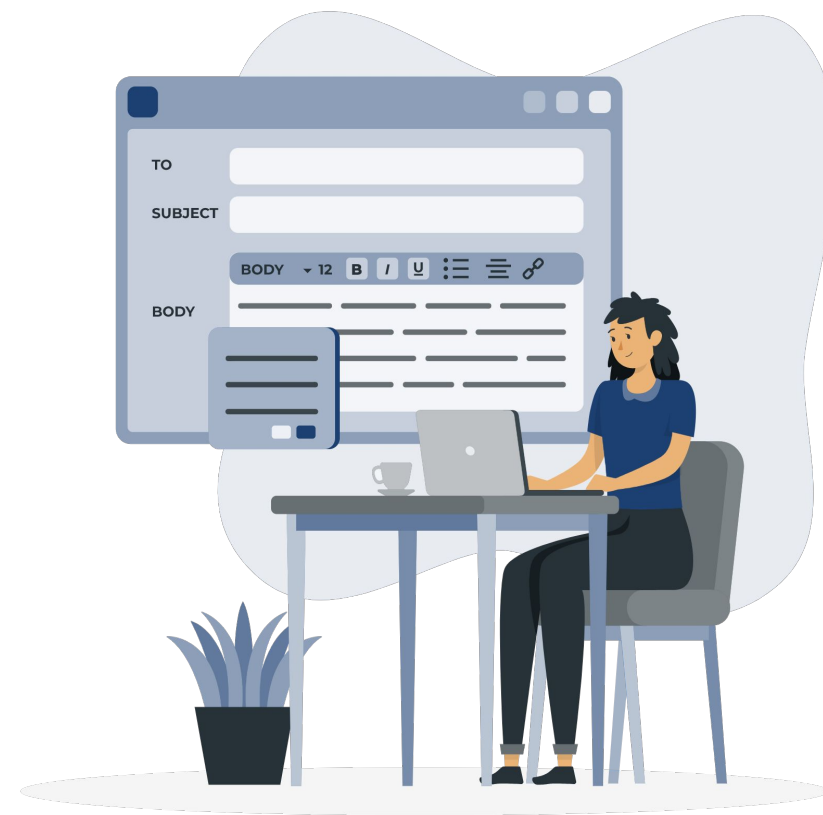


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Training and Resources

- [SOAR Webinar](#) *Requires Reservation*
March 6th, 2025 at 12pm PST.
- [Live HMIS Part 2 Training Course](#)
Wednesday, March 26th, 2025 at 11am - 12:30pm

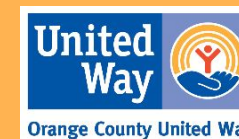
A reminder newsletter with more details will be sent out the week of the OC HMIS trainings.



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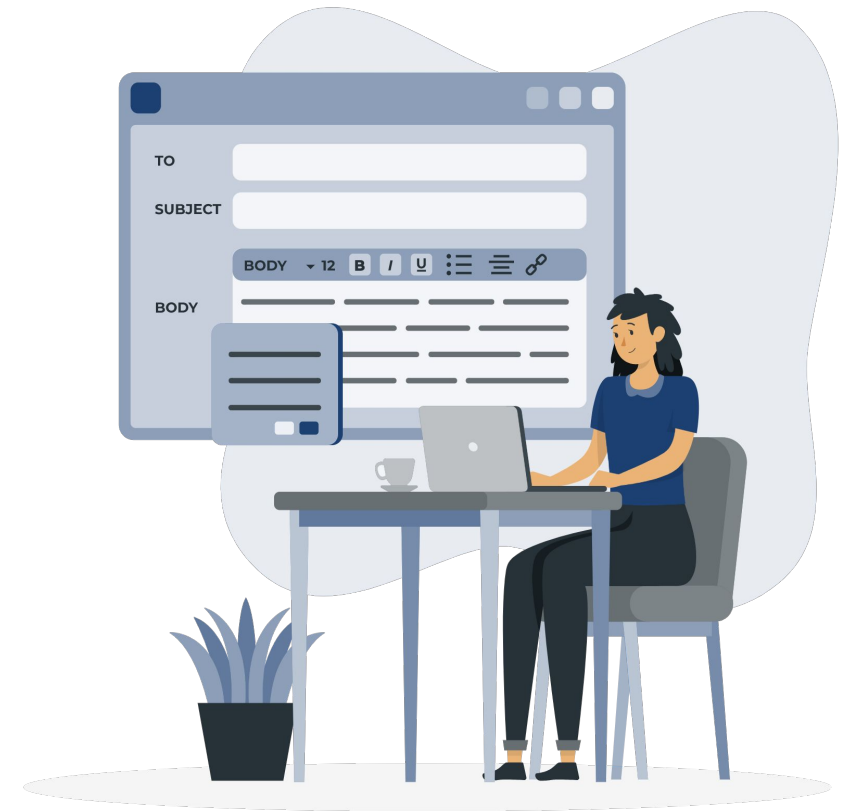
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Training and Resources

(Added to share new training/resources with the HMIS community)

- [Vicarious Trauma and Self Care Training](#)
Friday, March 21st, 2025 at 2pm - 3pm
 - Email Sara Behmerwohld at sbehmerwohld@humanoptions.org with “SELF-CARE TRAINING” in subject line to receive Zoom info.
- [OC CES Academy](#)
 - The Office of Care Coordination is proud to announce the launch of the [Orange County \(OC\) Coordinated Entry System \(CES\) Academy](#), a training platform, and the launch of the CES 101 training module.



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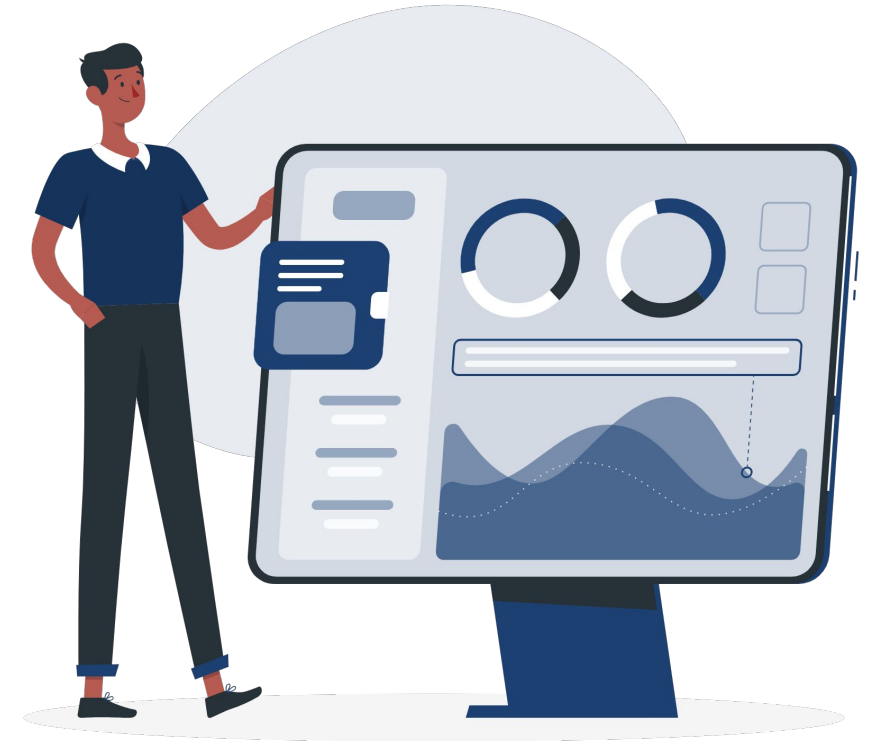
Project Performance Report

The Project Performance Report (PPR) for HP (Homelessness Prevention) 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 PSH-OPH, RRH, TH PPR draft data will be uploaded into DropBox in this weeks

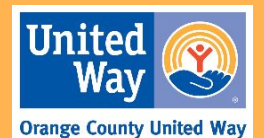
The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



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Holiday Observed

The HMIS Helpdesk will be closed on **Monday, March 31st** in observance of **Cesar Chavez Day**.

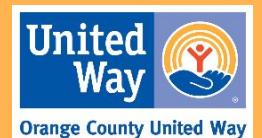
We will be back in office the following business day to assist you.



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HMIS Meeting Survey

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

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

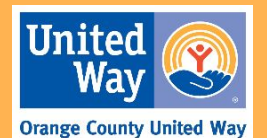
Survey: <https://forms.gle/scvYfStTEyQ9BdMo7>



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Q&A

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

Thank you
Have a great day!

Next User Meeting: April 2nd



**United
Way**



Orange County United Way