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Welcome!

June 2025

OC HMIS User Meeting



Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Policy and Procedures Update
3. System Performance Measures
4. Clarity Feature Updates: Check In Button and Signature Field Type
5. 2025 Agency Audits
6. Data Entry for Social Security Number
7. Removing Household From Community Queue
8. Exiting Clients from Program
9. Reopen a Program Enrollment
10. Potential Exits Report
11. Training and Resources
12. Project Performance Report
13. Survey
14. Q&A
15. 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



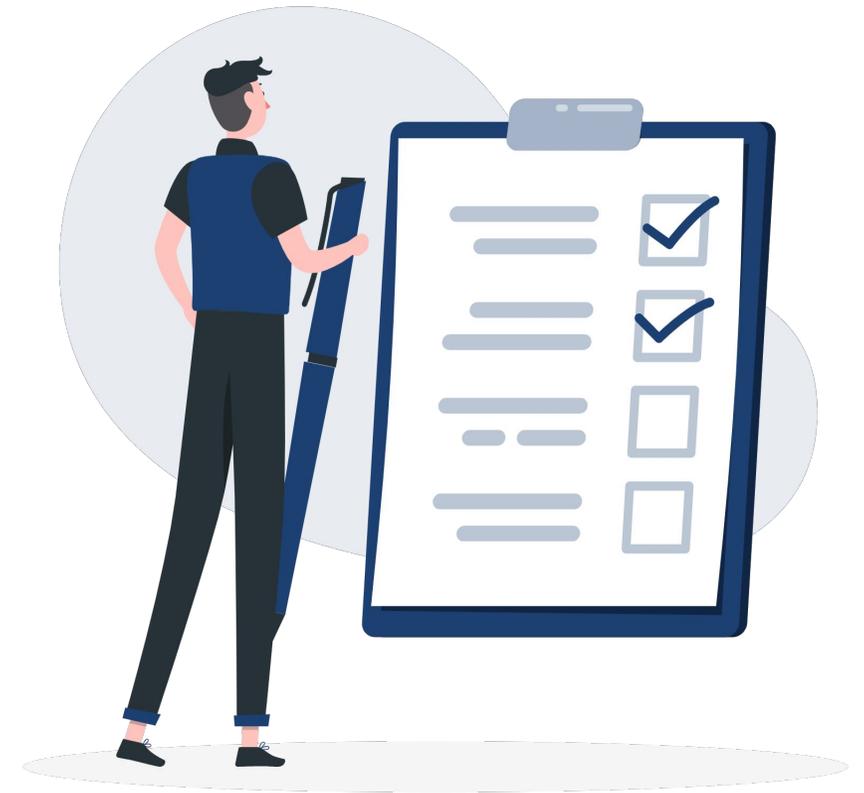
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March												
	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

- Housing Inventory Count (HIC) & Sheltered Point in Time (PIT)
 - HDX 2.0 opened for HIC/Sheltered PIT submission May 13th
 - 2025 HIC/Sheltered PIT due June 13th
- HMIS Agency Audit
 - Scheduling June - December
- PPR Corrections
 - Emergency Shelter Corrections will be added to your agency's DropBox



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HMIS Policies and Procedures Update

The HMIS Policies and Procedures was approved by the CoC Board in August 2024, with the exception of the Client Record Request policy. The policy was approved by the CoC Board during the May 2025 meeting.

- The CoC Board requested additional research be done to determine if the Client Record Request policy should be updated to allow clients to request their full record in HMIS
- Additional policies and forms are being updated to provide clarity, reflect new guidance, or reflect new internal processes



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HMIS Policies and Procedures Update

Client Record Request

Clients requesting specific information in their HMIS record may work directly with an agency participating in HMIS

- Case notes may be shared by the agency that entered them at the agency's discretion
- Agencies can only provide information that they have access to view in HMIS

Clients that want to receive their full HMIS record may submit a record request by contacting a Service Provider currently participating in HMIS

- Clients will be able to select the types of data they would like to review
- Case notes are not included in the full record request submitted to the HMIS Lead



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HMIS Policies and Procedures Update

Client Record Request

Clients may request edits to data they contributed to HMIS

- Clients that wish to edit data for a specific project must contact the agency directly to request the edit
- If a project is closed or the agency administering the project is no longer participating in HMIS, no edits can be made.

Data contributed by a participating agency (enrollment history, services, case notes, etc.) cannot be edited at a Client's request

Data Use & Disclosure

- Clarify that data may be used or disclosed without client consent for system administration, technical support, program compliance, analytical use, and other purposes as outlined in the Privacy Notice or required by law



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HMIS Policies and Procedures Update

Data Release

- Clarify that client data will not be shared without consent except for uses and disclosures outlined in the Policies and Procedures or otherwise required by law
- The HMIS Lead, CoC Collaborative Applicant, CES Lead, and CES Administrators may release aggregate data about the CoC without organization or CoC Board permission

Data Integration

- Agencies must be approved for HMIS access before submitting any data integration requests
- Update language around new API process



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HMIS Policies and Procedures Update

Data Integration

- Agencies requesting to integrate their own HMIS data with a case management software will be reviewed and approved by the HMIS Lead.
- Requests to integrate Coordinated Entry System data will be reviewed and approved by the HMIS Lead and the CES Lead
- Agencies requesting to integrate HMIS data from other agencies that they do not manage will be reviewed and approved by the CoC Board.



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HMIS Policies and Procedures Update

Client Consent

- Clarify that the client is consenting for their data to be shared with other service providers/organizations in HMIS
- Signing the consent form also means that the client's data may be included in data requests approved by the CoC Board

Grievance Form

- Refer clients to OCC for grievances related to the Coordinated Entry System
- Provide examples of HMIS-related grievances



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HMIS Policies and Procedures Update

Privacy Notice

- Clarifies that there are situations where client data may be disclosed without the client's consent
- Clients that submit a Client Record Request will have their full record sent to the agency that submitted the request on their behalf



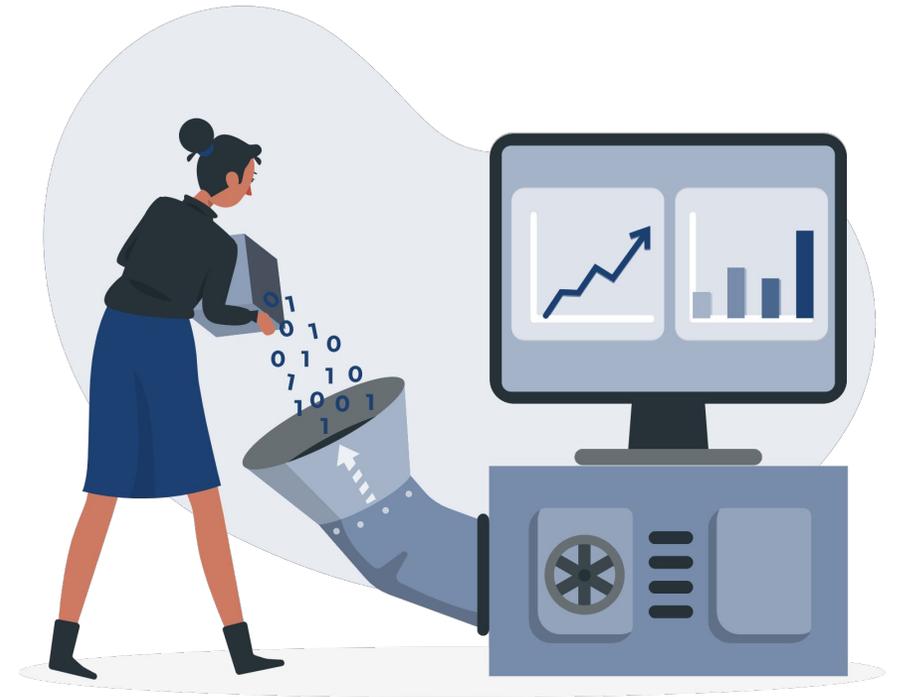
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System Performance Measures

- CoCs are required to measure their performance annually as a coordinated system and submit the results to HUD
- System Performance Measures (SPM) allow the CoC to evaluate and improve their performance as a whole
- HUD uses data from the performance measures as selection criteria to award grants under the CoC Program



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System Performance Measures (SPM)

- Current reporting period: 10/1/23 – 9/30/24
- Project types:
 - Safe Haven
 - Street Outreach
 - Emergency Shelter
 - Transitional Housing
 - Rapid Re-Housing
 - Permanent Supportive Housing
 - Other Permanent Housing
- A Year-Over-Year Comparison Report is provided
[Year-Over-Year Comparison 2019 -2024](#)
[SPM 2023-2024](#)



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System Performance Measures (SPM)

Measure 1: Length of Time Persons Remain Homeless

Measure 2: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness (Recidivism)

Measure 3: Number of Homeless Persons

Measure 4: Employment and Income Growth for Homeless Persons in CoC Program-funded Projects

Measure 5: Number of persons who become homeless for the 1st time

Measure 7: Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing

SPM - Performance Comparison from Previous Year

Improved Performance Scores

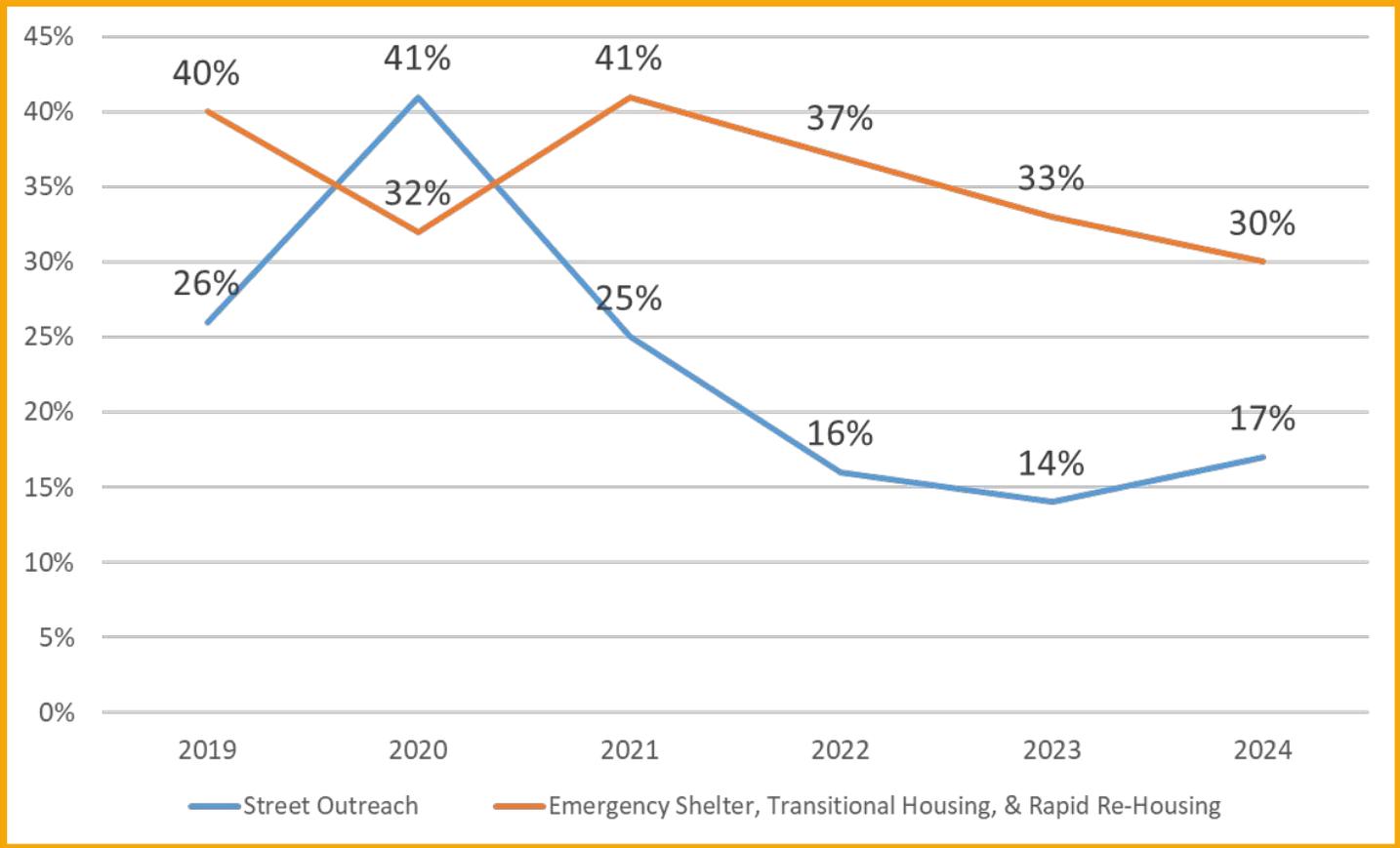
-  1. Returns to Homelessness
-  2. People who Become Homeless for the First Time
-  3. Successful Exits from Street Outreach

Declined Performance Scores

-  1. Length of Time People Remain Homeless
-  2. Number of People Experiencing Homelessness
-  3. Increase in Income For Adults in CoC Funded Projects
-  4. Successful Exits From Emergency Shelter, Safe Haven, Transitional Housing, Rapid Re-Housing

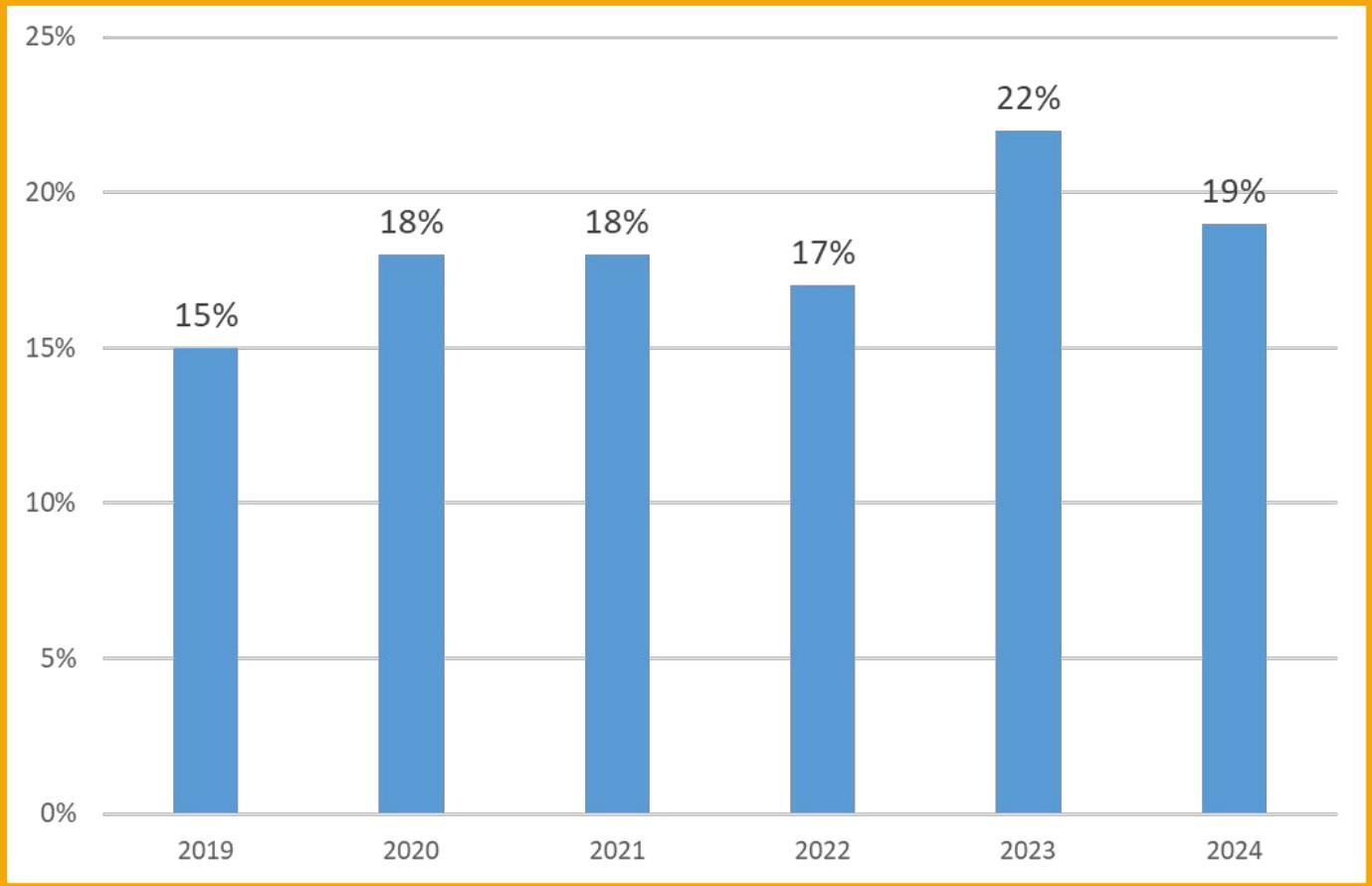
Successful Exits

People experiencing homelessness are exiting to successful housing situations less frequently than they were in 2019



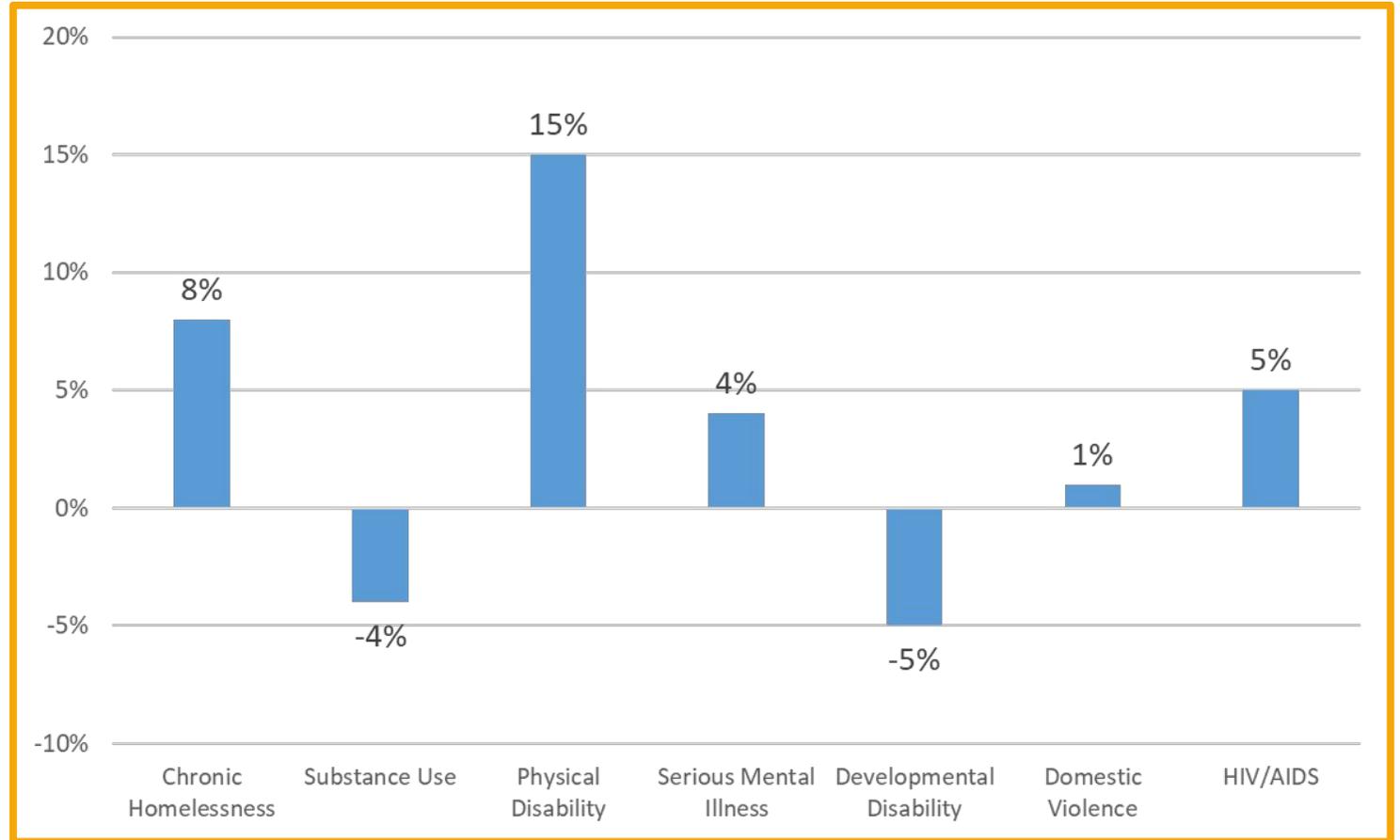
Returns to Homelessness

While performance for this measure has improved from the previous year, the overall trend is that people are falling back into homelessness after being placed in permanent housing at higher rates than they were in 2019



Change in Subpopulations & Disabling Conditions

People experiencing homelessness have higher needs than those served in 2019



Conclusions

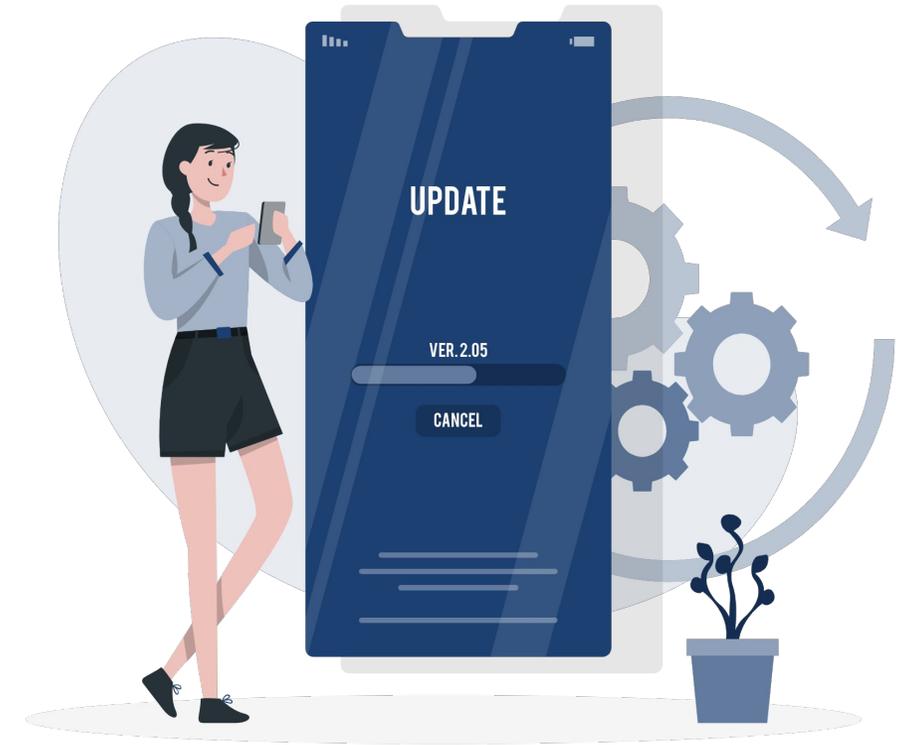
- The population experiencing homelessness has become more vulnerable since 2019, and therefore needs more support in order to find and be placed in permanent housing situations
- More long-term supportive housing is needed to keep people housed

June's Clarity Featured Updates

A Check-In button on the client's profile screen and Signature Field Type will be available on the Clarity Training Site shortly for our community testing.

Updates will be included in the HMIS meeting minutes. Please feel free to test out the new features and share feedback to our HMIS Helpdesk.

- Submit a [ticket](#) with the Feedback Category



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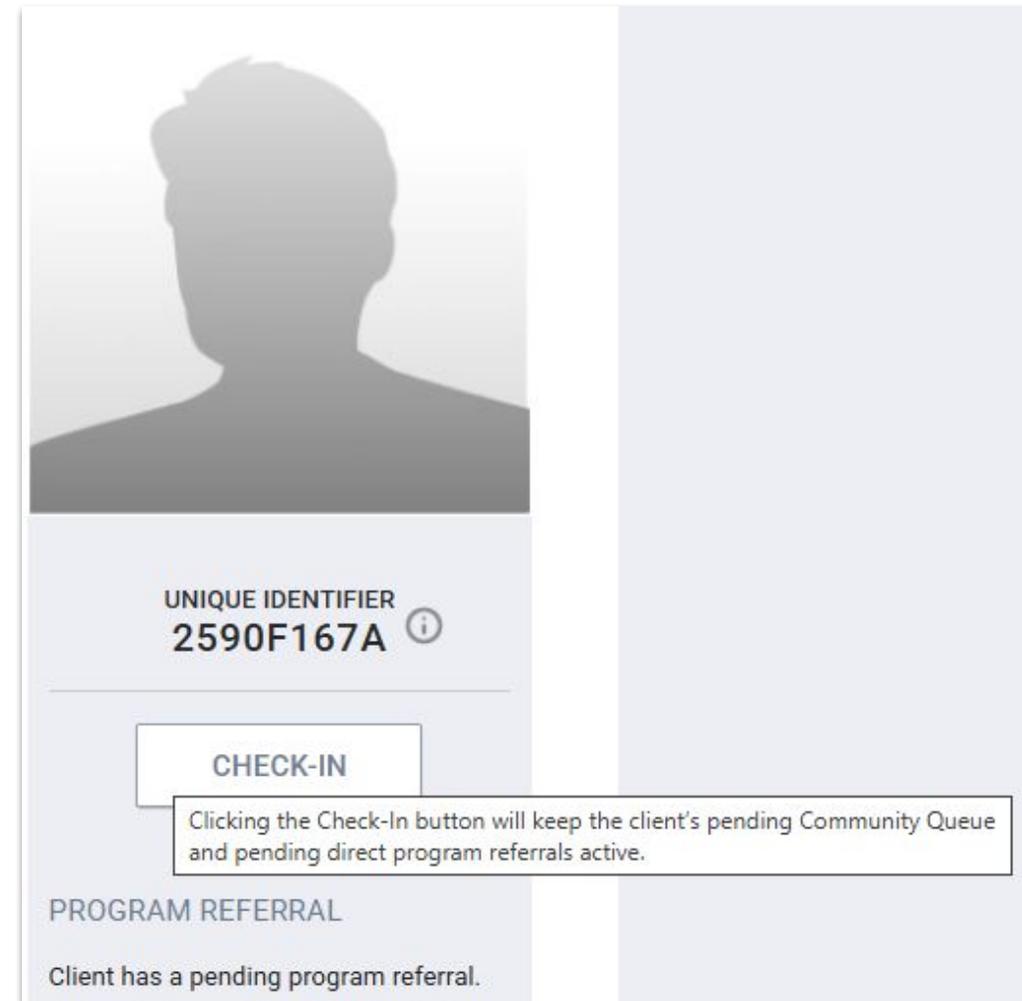
Clarity Featured Update: Check-in Button for Client Profile

A Check-In button has been added to the client profile that allows users to quickly check in a client without accessing their referral.

The Check-In button will be visible on the client profile screen below the client's unique identifier if the client has a referral to the Community Queue.

The following actions take place when the user clicks the Check-In button:

- The clock resets for the referral and the client will remain active in all currently pending community queue referrals
- The "Last Activity" date on the modify referrals page updates to today for all currently pending referrals
- The action of clicking the "Check-In" button is reflected in the Client Profile audit log.



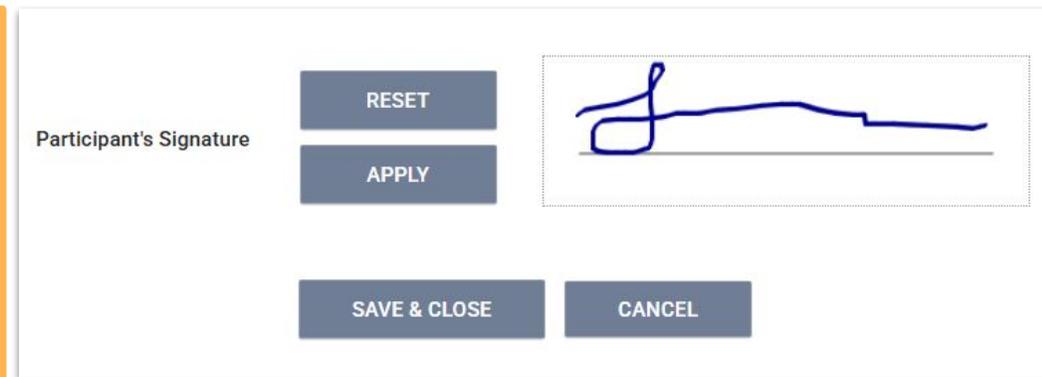
Clarity Featured Update: Signature Field Type

There is a new “Client Signature” core field and “Signature” field type available which allows users to collect signatures on customizable screens.

This signature field can be added to the following screens:

- Profile
- Program Enrollment
- Program Status
- Program Exit
- Assessment
- Program Follow up

When the signature field is not blank/null, the data will return 'Signed' in reports.



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2025 Agency Audits

The 2025 HMIS agency audit cycle has officially begun!

The HMIS Helpdesk team will begin scheduling audits in **JUNE**. Please be on the lookout for an audit scheduling email that our team will be sending out throughout the summer and fall months.

The HMIS Helpdesk team will reach out to your agency 2 weeks before your scheduled time slot to provide you with a list of available audit dates. Agency administrators will have 2 weeks to complete the 2025 HMIS agency audit form before your scheduled audit.



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UDE 3.02: Social Security Number

Social Security Numbers (SSNs) are collected during the intake process to support with the unique identification of each client served. CoCs rely on accurate SSNs and client UIDs to produce an unduplicated count of clients served within HMIS.

SSN Data Collection Instructions:

Data Collected About -- All Clients

Project Type Applicability -- All HMIS Project Types

Collection Point -- Record Creation

As part of our mission to end homelessness, service and housing providers should aim to increase access and utilization of mainstream programs by clients who are homeless or at-risk of becoming homeless. Since SSNs are a required data element for many mainstream programs, projects may require access to accurate SSNs to help their clients access key services.

PATH, CoC and ESG-funded projects are only required to collect the last four digits of a client's SSN, although they may collect all nine digits. Some projects may serve clients that don't have an SSN; in these cases staff members should select the "*Client doesn't know*" response. Federal statute 5 U.S.C § 522a prohibits government agencies from denying shelter or services to clients who don't know, or refuse to provide their SSNs.



Invalid SSN Warning

Whenever staff members enter an SSN for a client during the record creation process, Clarity HMIS will check to see if the SSN is valid.

SSNs are considered invalid if any of the following are true:

- last four digits are "0000"
- first three digits are "000", "666", or start with a "9"
- middle digits (second grouping of digits) are "00"
- digits are repetitive, such as 111-11-1111 etc.
- digits are sequential, such as 123-45-6789 etc.

If the SSN is invalid, a pop-up warning will appear:

- Staff members can click "**Cancel**" to correct the SSN
- Staff members can click "**Ok**" to save the invalid SSN

octrain.clarityhs.com says

The SSN entered does not conform to Social Security Administration guidelines. Click 'Cancel' to change the SSN. Click 'OK' to proceed with the SSN entered.

A screenshot of a web form. At the top, there is a red error message: "Please correct errors." Below this is a dark grey header bar with the text "CREATE A NEW CLIENT". Underneath, there is a label "Social Security Number" followed by a text input field containing the value "111 - 11 - 1111".

Non-Numeric SSN Digits

Staff members can enter non-numeric characters for any digits of a client's SSN that are unknown or refused by the client. Clarity HMIS will automatically convert these characters to an "X".

- If a non-numeric character is entered for all nine digits of an SSN, the "Quality of SSN" field will default to "Client doesn't know"
- If any digit of the SSN has a non-numeric character, and there are no more than 8 non-numeric characters, the "Quality of SSN" field will default to "Approximate or partial SSN reported"
- If the "Consent Refused" toggle is enabled, all SSN digits will convert to X's when the client record is saved

CLIENT PROFILE

Social Security Number xxx - xx - xxxx

Quality of SSN Client doesn't know

CLIENT PROFILE

Social Security Number xxx - 53 - 4865

Quality of SSN Approximate or partial SSN reported

CLIENT PROFILE

Social Security Number xxx - xx - xxxx

Quality of SSN Client prefers not to answer

Last Name Refused

First Name B469994CC

Quality of Name Client prefers not to answer

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SSN Data Quality Codes

Data Quality Code	Description
Full SSN Reported	A complete and valid SSN is provided
Approximate or Partial SSN Reported	Any SSN other than a complete and valid 9-digit SSN, regardless of reason, is reported
Client doesn't know	Client does not know or does not have an SSN
Client prefers not to answer	A client prefers not to provide any part of their SSN, regardless of the reason
Data not collected	No attempt was made to collect an SSN from the client

Removing Households From the Community Queue

The CES Community Queue (CQ) referral should remain active as long as there is contact with the household within the 90-day timeframe.

Households may be removed from the CQ if/when:

- The household attains housing outside of the CES.
- The household no longer desires to participate in the CES.
- The household cannot be contacted by any Access Point teams with active concurring enrollments, within the 90-day timeframe.



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Removing Households From the Community Queue

The OC Clarity system will automatically remove a member from the queue due to inactivity.

This means none of the four check-in activities outlined in the Knowledge Base Article: [Maintaining Households on the Community Queue](#) have occurred within the past 90-days.

If the household is removed due to inactivity before their housing needs have been met, they can be referred back via new [CES Assessment](#).

Further information about removing households from the CES Housing Community Queue is available via the [Removing Households from the Community Queue](#).



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Removing Households from the Community Queue

DEMO



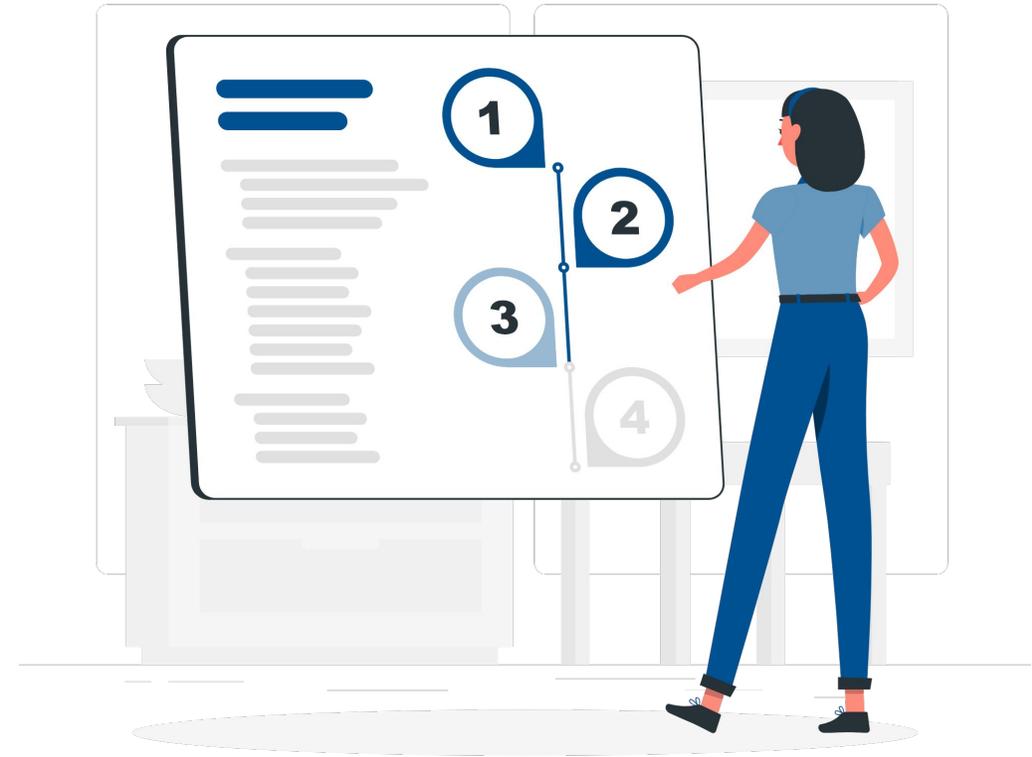
Exiting Clients from a Program

Clients may be exited from a project for the following reasons:

- Successful program completion.
- Client/household has 90-days of no engagement.
- Client/household wishes to exit the program.

If a client is erroneously exited or must be reopened for data correction, the enrollment can be restored by navigating to the exit screen and clicking 'Reopen Client Program,' at the bottom right of the screen.

Learn more by reviewing the [Reopen Program Enrollment Knowledge Base Article](#).



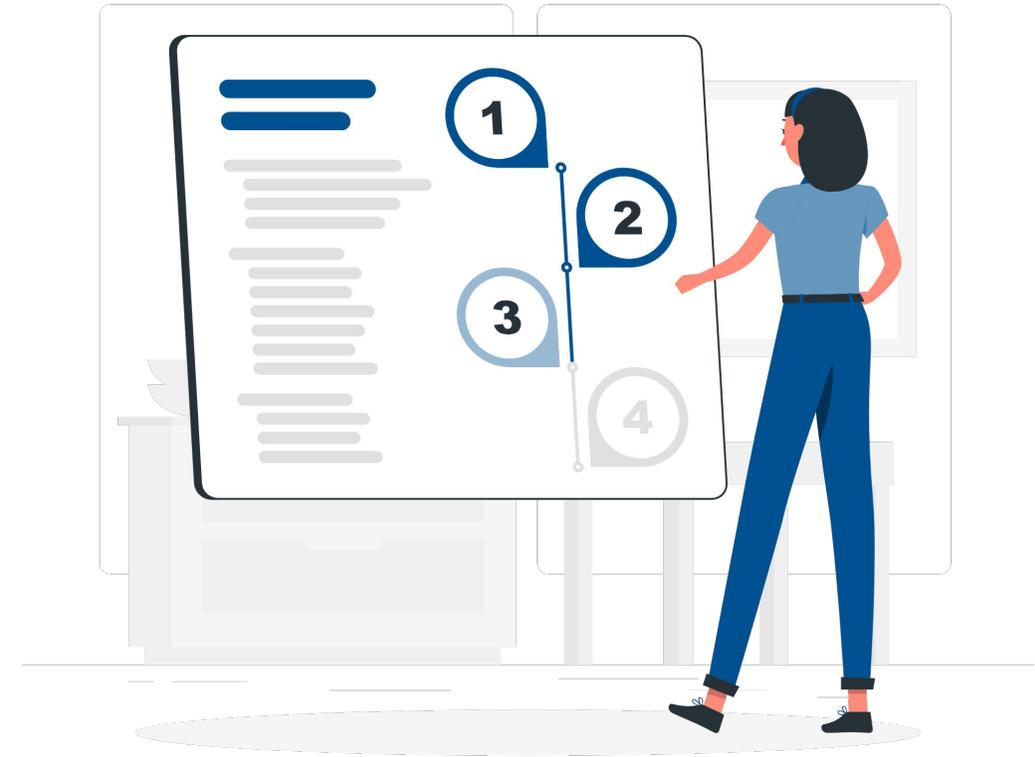
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Exiting Clients from a Program

When completing a program exit, be mindful...

- For group enrollments, the option to exit several household members will appear. Toggle the switch next to the member(s) you wish to exit.
- When exiting the Head of Household (HoH) from a group enrollment, a new HoH will need to be assigned before exiting the current HoH.

Review the [Exiting Clients from a Project](#) Knowledge Base Article for guidance on when and how to exit clients from a project.



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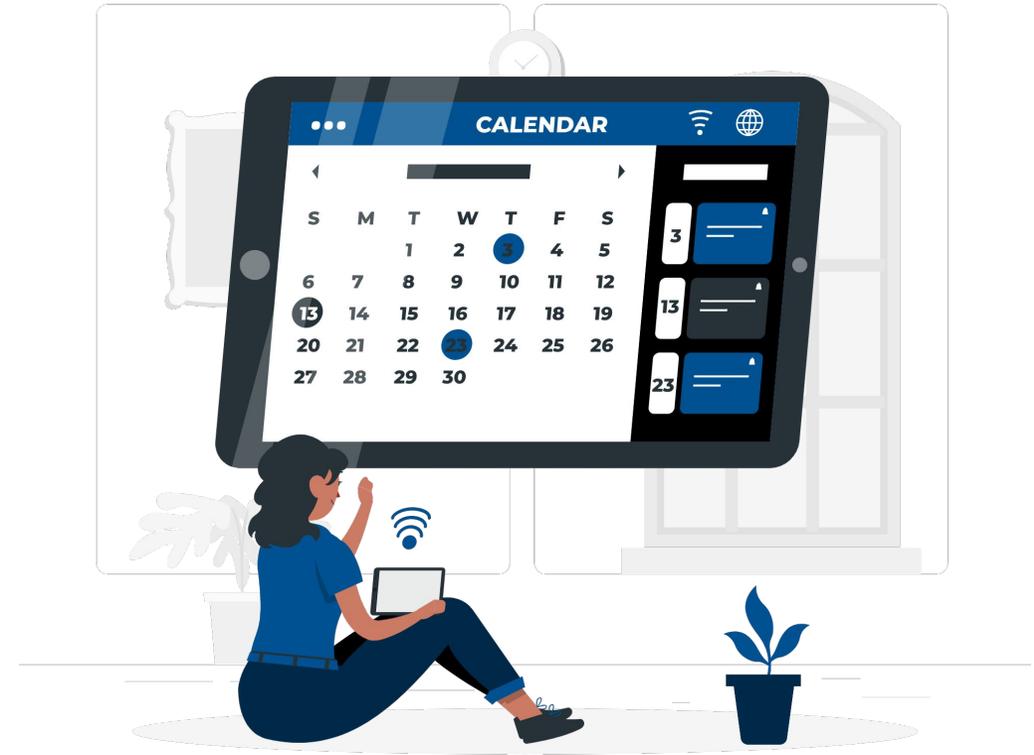
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Exiting Clients from a Program

Program Exit Date:

- Remember to adjust the program exit date to reflect the last day the client received services or of bed/unit occupancy.
- Each household member of a group enrollment will have their own project exit date to reflect when they stopped receiving services/occupied the bed or unit.

Review the [Project Exit Date](#) Knowledge Base Article for additional details on the data element.



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Exiting Clients from a Program

DEMO

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Reopen Program Enrollment

There may be times when staff will need to know how to reopen a program enrollment.

For example, if staff accidentally exit a client from a program, an incorrect date was added or if exit data needs to be edited, knowing how to reopen a program enrollment will be helpful.

Step 1: Navigate to the enrollment you are wanting to reopen. Click the **Exit** button to access the exit data.

Step 2: Scroll down to the very end and click on the “**Reopen Client Program**” button.

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM: HOMELESS PREVENTION

Enrollment History Assessments Notes Files Forms ✕ Exit

Enroll Program for client Humming Bird

Project Start Date 05/22/2025

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

LIVING SITUATION

Type of Residence Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

Length of Stay in Prior Living Situation One week or more, but less than one month

Approximate Date Homelessness Started 05/01/2025

Number of times on the streets, in ES, or SH in the past three years Two Times

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years Two Months

State Health Insurance for Adults

Indian Health Services Program

Other Health Insurance

SAVE & CLOSE CANCEL

Reopen Client Program Audit Log

Reopen Program Enrollment

In cases where the exit date was entered incorrectly or an exit was accidentally added, please follow the next steps.

Step 3: A pop-up will appear with the following statement. "This action will clear the exit date". Click **save**.

The exit data will remain, but the enrollment will be reopened. You may confirm the End Date is now listed as "active".

HEALTH INSURANCE

Covered by Health Insurance Yes

MEDICAID

MEDICARE

State Children's Health Insurance Program

Veteran's Administration (VA) Medical Services

Employer-Provided Health Insurance

Health Insurance Obtained Through COBRA

Private Pay Health Insurance

State Health Insurance for Adults

Indian Health Services Program

Other Health Insurance

SAVE & CLOSE CANCEL

REOPEN CLIENT PROGRAM

This action will clear the exit date. To clear all exit data, please select toggle below before saving.

Clear All Exit Data

SAVE CANCEL

Reopen Client Program Audit Log

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Individual Coordinated Entry System Coordinated Entry County of Orange ⓘ	05/27/2025	Active	Individual
Homeless Prevention Homelessness Prevention Test Agency ⓘ	05/22/2025	Active	Individual

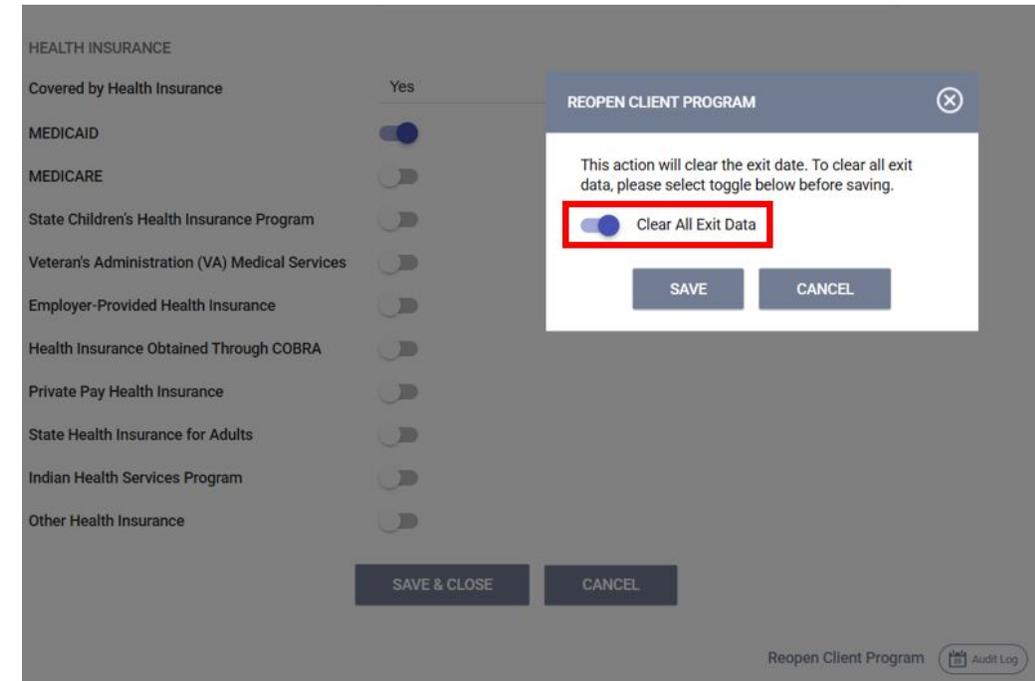
Reopen Program Enrollment

The next steps depend on whether the Clear and Restore All Exit Data functionality is enabled. This functionality is limited to users who have been approved to have this additional access. *All Agency Admins have this additional access.

Users with access to Clear and Restore Exit Data can follow the steps below:

Step 3: A pop-up will appear with the following statement. "This action will clear the exit date. To clear all exit data, please select toggle before saving."

Toggle "***Clear All Exit Data***" to completely remove an accidental exit.



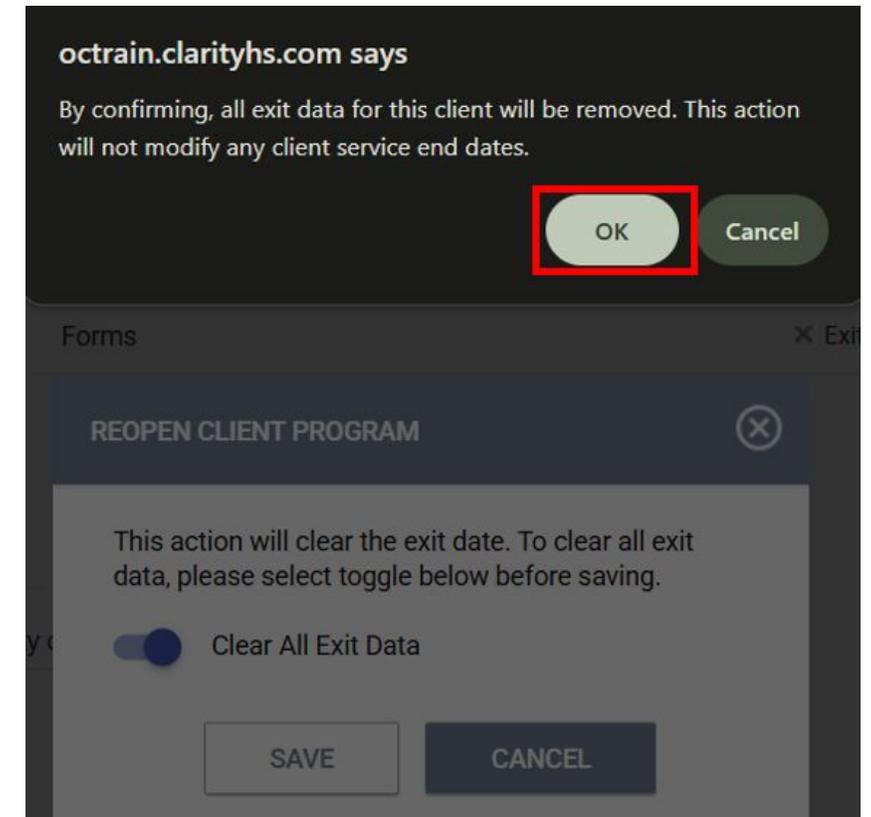
Reopen Program Enrollment

Step 4: The following message will appear “By confirming, all exit data for this client will be removed. This action will not modify any clients service end dates. Click **OK**.”

The page will refresh on the “End Program” screen and the project exit date and the exit data will be cleared. You may confirm the end date is now listed as “active”.

Important Notes:

- Service End Dates are separate from this process
- This process will need to be completed per household member
- Clearing the exit date and hitting save will not remove the end date.



PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Individual Coordinated Entry System Coordinated Entry County of Orange ⓘ	05/27/2025	Active	Individual
Homeless Prevention Homelessness Prevention Test Agency ⓘ	05/22/2025	Active	Individual

Reopen a Program Enrollment

DEMO



Potential Exits Report

The Potential Exits Report can be helpful to identify clients who may need to be exited. This report flags clients that are active in a program but haven't received services, CE events, and casenotes within the selected cut off date range.

From the **Launchpad**, click on reports, navigate to the Report Library>Program Based Reports>Potential Exits by. Click **Run**.

Enter in your reporting parameters:

- Select the program(s) you wish to include in your report
- Enter in your cut off date
- Select your preferred Report Output Format
- Click **Submit**

The screenshot shows the 'REPORT LIBRARY' interface. At the top, there are navigation links for 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. Below this, a 'REPORT LIBRARY' header is followed by a list of report categories: 'Favorite Reports' (5 report(s)), 'Data Quality Reports' (6 report(s)), 'Administrator Reports' (3 report(s)), 'Service Based Reports' (13 report(s)), and 'Program Based Reports' (24 report(s)). The 'Program Based Reports' category is highlighted with a yellow box. Below this, a list of reports is shown, including '[EMPL-101] Employment Report', '[EMPL-102] Employment / Education Report', '[EXIT-101] Potential Exits', and '[EXPS-103] Program Funding Source Financial Detail'. The '[EXIT-101] Potential Exits' report is highlighted with a red box. Each report entry includes a star icon, a 'RUN' button, a 'SCHEDULE' button, and a 'MORE INFO' dropdown menu.

The screenshot shows the configuration page for the '[EXIT-101] Potential Exits' report. The breadcrumb navigation is 'Program Based Reports > [EXIT-101] Potential Exits'. The 'Program(s)' field is a dropdown menu with 'All' selected, and other options include 'CoC Funded Family Coordinated Entry Training Project', 'CoC Funded Permanent Supportive Housing Training Project', and 'CoC Funded Rapid Re-Housing Training Project'. The 'Cut off Date' is set to '05/28/2025'. The 'Report Output Format' is set to 'Web Page' (selected), with 'PDF' and 'Excel' as other options. A 'SUBMIT' button is located at the bottom right.

Potential Exits Report

Scroll up, refresh your webpage and click on the **Report Queue icon**.

Once the Potential Exits Report loads, you'll be able to see the client UID, the client name, the last four of the client's social security number, the project name, details about their most recent activity, the assigned staff, and if the enrollment type is for a family or individual.

For more information about a client's most recent activity, click on the client UID to be taken to the client's profile.



Potential Exits							OC Training Agency
							Cut off Date: 05/28/2025
<p>Clients below are active in the program and do not have a qualifying activity since the cut-off date.</p> <p>The following program-level activities are qualifying activities: Unit Connections, Services, CE Events/Results, Case Notes, and Program-Level Assessments (Annual, Status, and Current Living Situation).</p>							
Unique ID	Client Name	SSN	Project Name	Most Recent Activity	Most Recent Activity Date	Assigned Staff	Enroll Type
A1BE16B80	- 2, Client	***-**-0000	Non-Federally Funded Emergency Shelter Training Project				Family
204F18C04	000, Client 002	***-**-9833	CoC Funded Rapid Re-Housing Training Project				Family
F09BB0547	000, Client 003	***-**-2012	CoC Funded Rapid Re-Housing Training Project				Family
826C1E98B	01, Client	***-**-0000	ESG Funded Homeless Prevention Training Project	Case Management: Case Management Session	10/17/2022	Training Account, Moving Forward Psychological Institute Inc.	Family
1D1395FD1	01, Client-	***-**-5339	CoC Funded Family Coordinated Entry Training Project	Transportation: Bus Pass	02/19/2023	Training Account, American Family Housing	Family
C5EB85314	02, Client	***-**-2222	ESG Funded Homeless Prevention Training Project	Annual Assessment	10/17/2022	Training Account, Moving Forward Psychological Institute Inc.	Family

Potential Exits Report

DEMO

2·1·1

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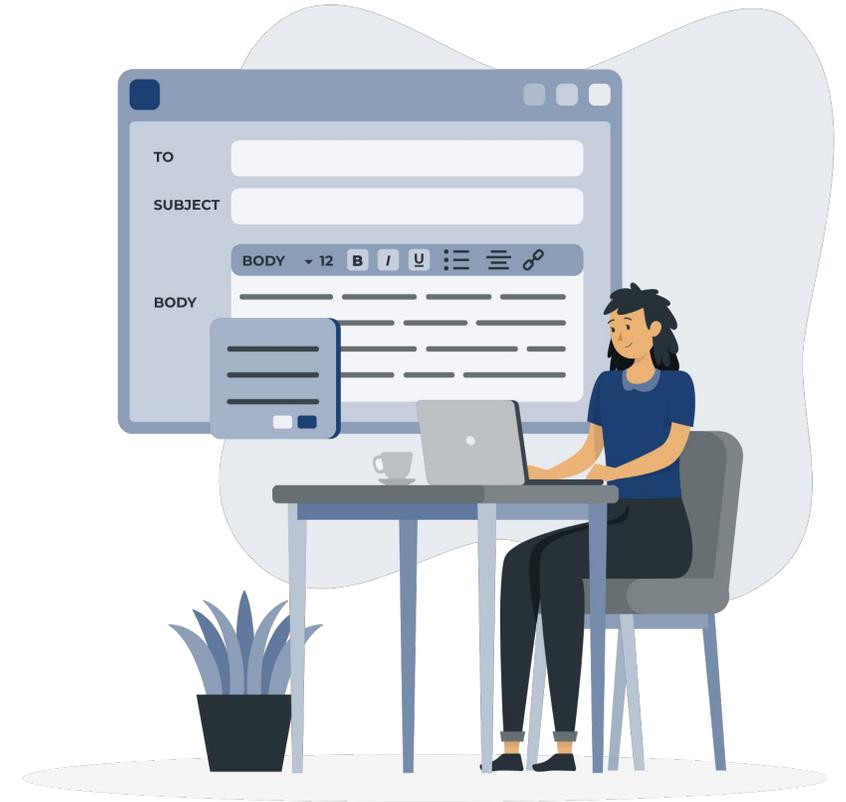


Training and Resources

June 2025 OC HMIS Trainings:

- **HMIS Part 2 Training**
Wednesday, June 25th, 2pm -3:30pm

Navigate to the [OC HMIS Calendar](#) and Meeting Links Doc for the registration links.



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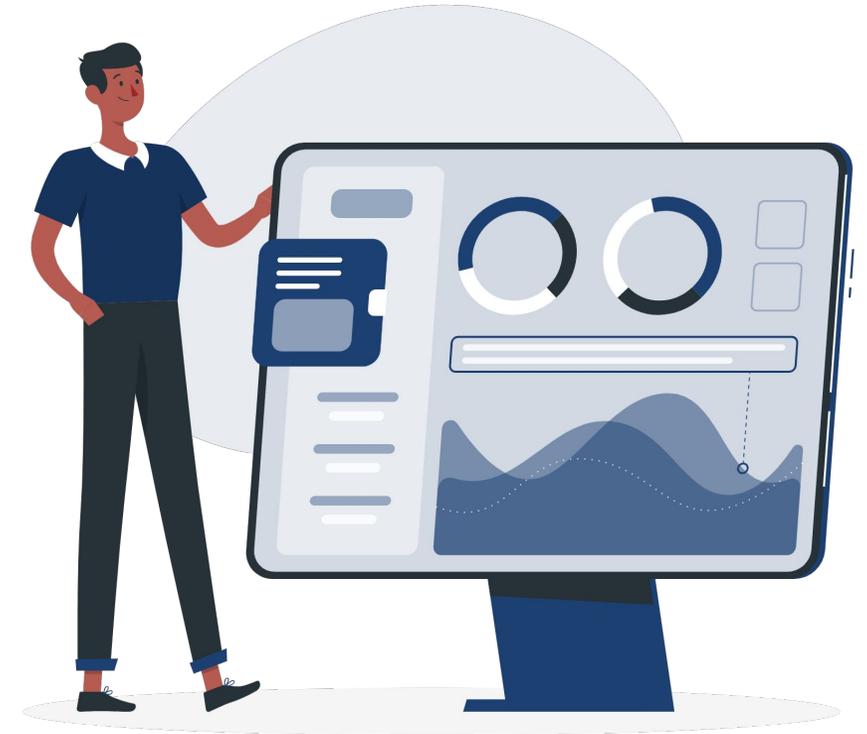
Project Performance Report (PPR)

The Permanent Supportive Housing & Other Permanent Housing, Rapid Re-Housing and Transitional Housing Project Performance and Goals and Outcomes Reports have been published.

Current and past PPRs can be found on the [Orange County HMIS](#) website: OCHMIS Website > Reports > [Project Performance Reports](#)

Corrections for the Emergency Shelter PPR draft data will be uploaded into DropBox in the upcoming weeks

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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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/8bd8uoKchzP86rPT6>



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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: July 2nd



**United
Way**



Orange County United Way