

OC HMIS User Meeting Webinar Minutes
07/02/25

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Agenda Items

HMIS Participating Agencies Schedule

HMIS Agency Audit

- Scheduling July - December

HMIS Part 2 Recertification

- Starting in July with a due date of August 31st

PPR Corrections

- Street Outreach Corrections are available in your agency's DropBox
 - If you don't have a Goal 10 spreadsheet in DropBox, your agency didn't have any exit data during the reporting period of 06/01/2023 - 05/31/2025

New Clarity Interface Focus Group

Thank you to all of the agencies that were a part of our Focus Group. We appreciate the constructive feedback that was provided.

As our vendor, Bitfocus, pushes out additional modules and other features in the future, we will reach out to the community for a new testing cycle.

Thank you to our Focus Group: A Community of Friends, Asian American Senior Citizens Service Center, City Net, City of Buena Park, City of Costa Mesa, City of Dana Point, City of Huntington Beach, City of Mission Viejo, County of Orange, Covenant House California, Families Forward, Friendship Shelter, Grandma's House of Hope, Health Care Agency - Outreach & Engagement, Health Care Agency -HSS, Helping HandUps, Jamboree, Mariposa Women and Family Center, Mercy House, Moving Forward Psychological Institute, New Directions for Veterans, O.C Rescue Mission, Orangewood Foundation, PATH, Pathways of Hope, Salvation Army Anaheim, SPIN, Stand Up for Kids, VOALA, Waymakers, and WISEPlace

HIC PIT Submission

Thank you to all participating agencies for your ongoing support with this year's 2025 HIC and Sheltered PIT submission.

Updated Privacy Forms

New Privacy Forms are available from the OC HMIS website.

The following forms have been updated with the latest revision dates:

- Consent to Share Personal Protected Information - revision date of 7/1/25
- The HMIS Grievance Form - revision date of 5/2025
- The Privacy Notice - revision date of 5/2025

To view the latest version of these forms, go to ochmis.org, find the HMIS Forms and Documents tab and select [HMIS Policies and Privacy Forms](#) from the drop-down options. Find the appropriate form and download to use. Please visit this page every time you need a form to ensure that you are always using the most updated forms. 211OC recommends that you not save these files to your computer because doing so means you will likely use outdated forms after the forms are updated.

Annual Assessment Overview Report

The Annual Assessment Overview report provides a comprehensive view of the annual assessment statuses. HMIS Users can use this report to track client progress regarding their annual assessments, providing insights into the timely completion of assessments, overdue assessments, and data-related issues to assist with data quality, compliance, and monitoring.

The Annual Assessment Overview report provides a two table output for each project. The Annual Assessment Overview table displays information about the count of specific annual assessment statuses, while the Client Detail table provides a brief summary of a client's project enrollment.

HMIS Users can locate the Annual Assessment Overview Report by navigating to:

Reports > Report Library > Program Based Reports > [GNRL - 409] Annual Assessment Overview

The following tables provide a brief overview of all statuses and items contained in the Annual Assessment Overview's outputs:

Annual Assessment Overview Table

- Completed - Completed within the expected timeline (+/- 30 days from anniversary date)
- Completed Out of Range - Completed outside of the expected timeline (+ 31 days from the anniversary date)
- Past Due - No relevant completed assessment compared to the anniversary date
- Due - Assessment Due Date is within +/- 30 Days from the anniversary date
- Assessment Window Opening in 30 Days - Assessment Due Date is 31-60 Days Away from the anniversary date
- Not Due - Assessment Due Date is 61+ Days Away from the anniversary date
- Enrolled Less than 1 Year - Client was exited prior to 365 Days from the anniversary date
- Data Issue - Annual Assessment Dates cannot be inferred due to no HoH or other data issues
- Exited before HoH's 1st anniversary - Client exited in Report Date Range before HoH's 1st anniversary date

Client Detail Table

- Length of Stay (LOS) - Calculated as the number of days between the program start date and the exit date. If there is no exit date, LOS is measured from the program start date through today plus one day
- Expected Annual Assessment Count - The total number of anniversary due dates for a project stay where either:
 - Anniversary Due Date falls on or before today
 - Anniversary Date Status is marked as "Completed"
- Completed Annual Assessment Count - The number of anniversary due dates for a project stay where the Anniversary Date Status is either "Completed" or "Completed Out of Range"
- Last Annual Assessment Completed - The Annual Assessment Date associated with the most recent anniversary due date where the Anniversary Date Status is either "Completed" or "Completed Out of Range"
- Current Annual Assessment Status - Displays a Project Stay's "Current Annual Assessment Status"
- Next Annual Assessment Due - The nearest upcoming Anniversary Due Date that falls after today

APR Reports

All agencies that receive CoC funding are required to submit an APR electronically to HUD every operating year. The APR is submitted through HUD's [Sage HMIS Reporting Repository](#).

The APR is comprised of a series of tables with questions about service levels and outcomes for CoC-funded projects. The final report should be submitted as a single ZIP file that contains each report question as a separate CSV file.

Agency Admins should run the HMIS Data Quality Report in preparation for the APR to preemptively identify any data quality problems. The APR Submission Preparation Dashboard should also be run to obtain granular information about problematic enrollments.

The following should be taken into consideration as you're reviewing your APR. After running the report, select Web Report Output Format and review the Data Quality tables.

1. Changing the Head of Household (HoH) status - If the HoH changes, the household's annual assessment schedule updates to align with the new HoH's program start date.
 - a. Ensure statuses of each member are updated to reflect relationship to the new HoH
2. Client ages into adulthood - Clients who turn 18 while enrolled in a project must have an income and sources record created for them upon their 18th birthday, even if the client is not receiving any income.
3. Q22e Length of Time Prior to Housing and Q26b Number of Chronically Homeless Persons by Household - Sometimes children of HoHs will appear as having Data not collected, even though their HoH has it record. This is because children who are entered after the HoH will be counted as Data not collected, because the data was initially not collected for them.
 - a. Another reason children of Head of Households will appear as having Data not collected, even though their HoH has this recorded, is because the HoH's Approximate Homelessness Date Started was before the child's Date of Birth.

The APR calculates annual assessments for clients enrolled in a project for more than 364 days using the Head of Household's (HoH) project start date, otherwise known as the anniversary date.

All household members inherit the active HoH's anniversary date, even if they joined the enrollment after the HoH's project start date. For example, the following household has 3 clients as outlined below:

- Client A: HoH | Project Start Date: 1/1/24
- Client B: Spouse | Project Start Date: 6/1/24
- Client C: Child | Project Start Date: 6/1/24

The anniversary date for this household will be 1/1, until they are exited.

In 2025, annual assessments should be completed for all household members within 30 days of 1/1/24 even though Client B and Client C had not had a length of stay of 365 days.

HMIS Users can locate the principle **APR Report** by navigating to: Reports > Report Library > HUD Reports > [HUDX-227] Annual Performance Report

Annual Assessment Overview Report: Reports > Report Library > Program Based Reports > [GNRL - 409] Annual Assessment Overview

HMIS Data Quality Report: Reports > Report Library > HUD Reports > [HUDX-225] Data Quality Report

APR Submission Preparation Dashboard: Reports > Data Analysis > Built In Reports > APR Submission Preparation

2025 Agency Audit Reminder

The HMIS Helpdesk team have sent out July scheduling tickets. Please be on the lookout for an audit scheduling ticket 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 timeframe 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.

HMIS Part 2 Recertification

The [2025 HMIS Part 2 Recertification](#) is rolling out July 7th.

The 2025 Recertification schedule has been updated and will take place this summer for HMIS users.

- Agency Admins must submit the 2025 HMIS Part 2 Recertification Form for their users by **August 31th** to avoid having their accounts locked until the Recertification is completed.
- All HMIS Users, including Read Only Access, will be required to complete the [HMIS Privacy and Security online course](#)
- Users with data entry access will also be required to take the [2025 HMIS Part 2 Recertification](#)
 - Users with Read Only accounts are excluded from this requirement.

Agency Admins can run the Agency Active Users report to review active users at their agency as needed: Data Analysis > User Management > Agency Active Users.

Program Move

If users mistakenly enroll a client in the wrong program, Agency Admins can submit a ticket to the HMIS Helpdesk to perform a *Program Move*, and transfer that enrollment to the correct program.

Agency Admins should not request a *Program Move* for clients who need to transfer enrollments to continue receiving services due to funding constraints. Those clients should have two separate enrollments to maintain an accurate historical record of their enrollment history.

When working with enrollments that have Coordinated Entry System (CES) referrals attached, please exercise caution. Agency Admins should never delete an enrollment with an active CES referral.

Instead, a Program Move must be requested. This ensures that the CES referral remains properly linked and the Program Move will reflect the accurate program the client is enrolled in.

This step is critical for maintaining data integrity and ensuring clients remain accurately connected to their referrals and housing placement processes.

More information about this topic can be found in our [Deleting Program Enrollment](#) KB article.

Inactive HMIS Account 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 being locked. It is recommended that users set a calendar reminder to prompt them to log in once per month.

Once a user 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.

Those users will then need to retake the training courses that correspond to their access role as well as the HMIS Skills Test.

Please see the [KB](#) included in the chat to determine which course(s) are needed per access role.

Unit Utilization Reports

Two new reports have been developed to assist agencies calculate Unit Utilization for their projects.

These reports are to be used in unison and briefly processed in Excel to capture the final Unit Utilization percentage. *Please note that these reports are undergoing finalization and will be available shortly.*

To Access: Data Analysis>Orange County Clarity Reports>Project Performance Reports

- Unit Utilization - Bed/Unit Inventory: This report shows the total number of beds available during the reporting period.
- Unit Utilization - Beds/Units Provided: This report shows the total number of beds provided to clients during the reporting period.

Please review the [Unit Utilization Reports](#) KB for step by step instructions.

Project Performance Report

The Emergency Shelter Project Performance Goals and Outcomes Reports will be published in the upcoming weeks.

Corrections for the Street Outreach PPR draft data have been uploaded into DropBox.

For all other Goals: Run the [Project Performance Reports](#) in Clarity to review all included goals for this project type.

The Project Performance Overview is a helpful document that provides important information regarding the PPRs, including thresholds for each goal and our publishing schedule.

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

Resources and Training

July 2025 OC HMIS Trainings:

- [HMIS Report Training](#) - Project Performance Report Goals 1-5. Wednesday, July 30th at 2:00pm -3:30pm. No need to register in advance.

July 2025 HUD Resources:

- [FY 2024 HMIS Data Standards Manual](#)
- [HMIS Interactive Tool](#)

Community Resources:

- Helpful Coordinated Entry resources may be found on the [OC CES Academy website](#).

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.

Here's the link to the Survey: <https://forms.gle/An225w2LwSdplPfz5>

Q&A

Annual Assessment Overview Report

- Q: On the Annual Assessment Overview Report, when looking at the Data Issue column, when there is no head of household designated, an orange banner appears. Is this a new feature? Or has that always been there?
 - A: This orange banner will only appear if there's an error with an enrollment record. This is not a new feature.
- Q: What are the steps for the Annual Assessment Overview Report?
 - A: HMIS Users can locate this report by navigating to: Reports > Report Library > Program Based Reports > [GNRL - 409] Annual Assessment Overview

2025 Agency Audits

- Q: Who is required to participate in the Agency Audit?
 - A: The HMIS Audit is for all active HMIS participating agencies. HMIS Agency Administrators will receive a scheduling ticket when it's time to schedule an audit with the HMIS Team.

HMIS Part 2 Recertification

- Q: What are the steps of the recertification process, and the criteria to prompt annual recertification?
 - A: Agency Admins can run the Agency Active Users report to review active users at their agency as needed: Data Analysis > User Management > Agency Active Users.
 - Users with a data entry access role (*all user roles except Read Only*) whose accounts were created on or before January 1st 2025, must recertify. Users whose accounts were created after January 1st 2025 will be excluded.

- Agency Admins must submit the [2025 HMIS Part 2 Recertification Form](#) for their users by August 30th to avoid having their accounts locked until the Recertification is completed.
- Please review the [New Staff Onboarding](#) Knowledge Base Article for information about each access role type and their training requirements.

- Q: Does the HMIS Part 2 Recertification include HMIS Agency Administrators?
 - A: Yes, the HMIS Part 2 Recertification includes all account access role types except Read-Only, that were created on or before January 1st 2025.

- Q: When is the HMIS Part 2 Recertification due?
 - A: Agency Admins must submit the [2025 HMIS Part 2 Recertification Form](#) for their users by August 31th to avoid having their accounts locked until the Recertification is completed.

Future Meeting Information

August 2025 HMIS User Meeting Webinar

- Date: Wednesday, August 6th, 2025
- Time: 10:00 AM - 11:00 AM
- Click [here](#) to join the meeting! No registration or RSVP is required.
- All User Meeting webinar recordings and meeting minutes are available [on our website](#).
- Have an idea for a future agenda item? Submit a ticket via the [HMIS Help Desk](#) using the “HMIS – Users and Trainings” category with your ideas.