July 2025
OC HMIS User Meeting

Orange County
UNITED WAY

211

Get Connected. Get Help.™

Agenda

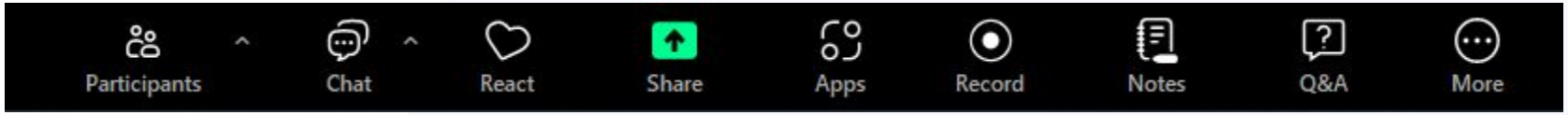
1. HMIS Participating Agencies Schedule
2. New Clarity Interface Focus Group
3. HIC PIT Submission
4. Updated Privacy Forms
5. Annual Assessment Overview Report
6. APR Reports
7. 2025 Agency Audit Reminder
8. HMIS Part 2 Recertification
9. Program Move
10. Inactive HMIS Account and Training
11. Unit Utilization Reports
12. Project Performance Report
13. Resources and Training
14. Survey
15. Holiday
16. Q&A
17. Office Hours

Meeting materials and recording will be available on the OC HMIS website

211 Get Connected. Get Help.™

Orange County UNITED WAY

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.

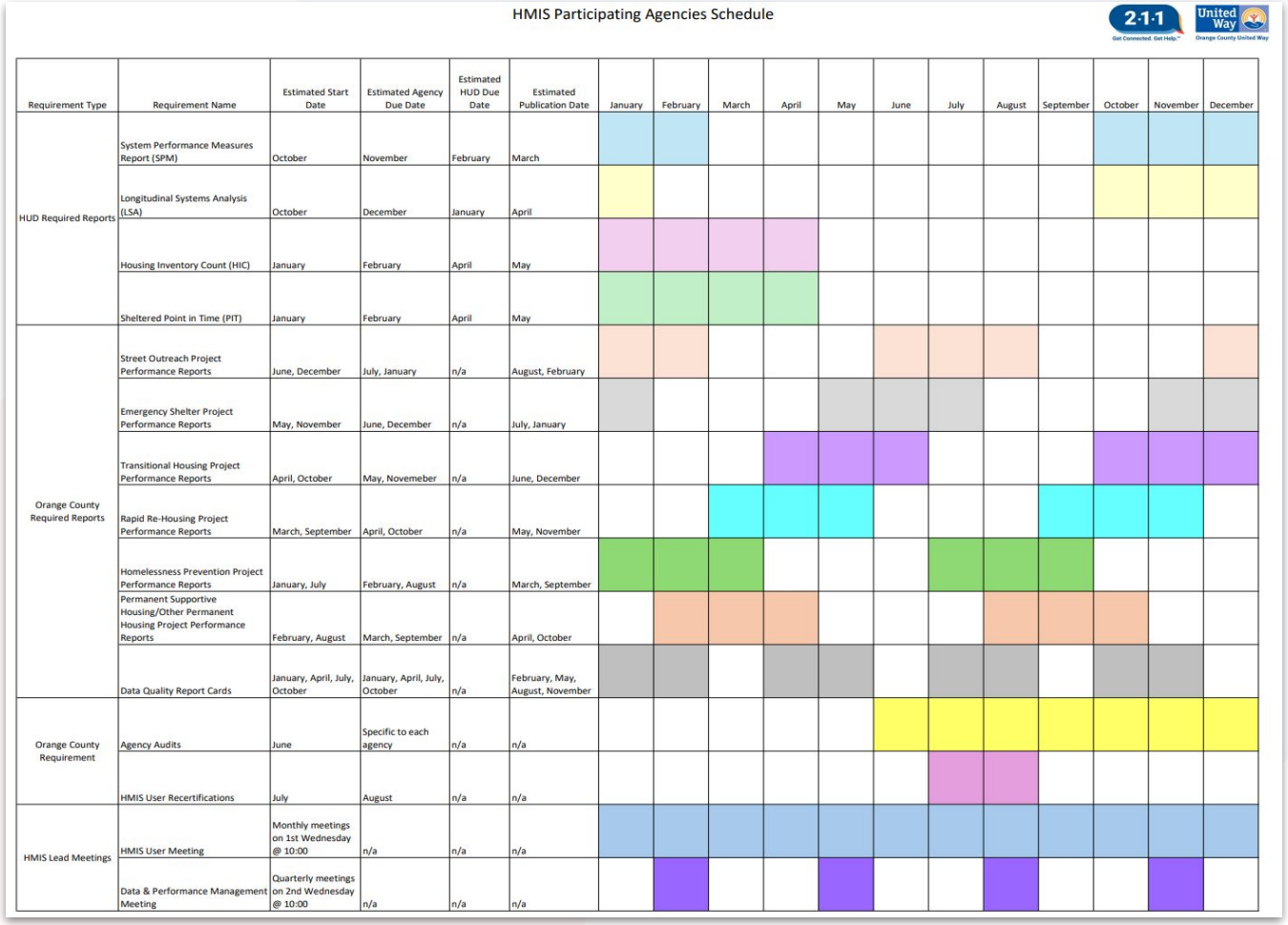
We request that you keep your questions general and related to the topics discussed in the meeting.

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.

211
Get Connected. Get Help.™

Orange County
UNITED WAY

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, Novemeber	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												

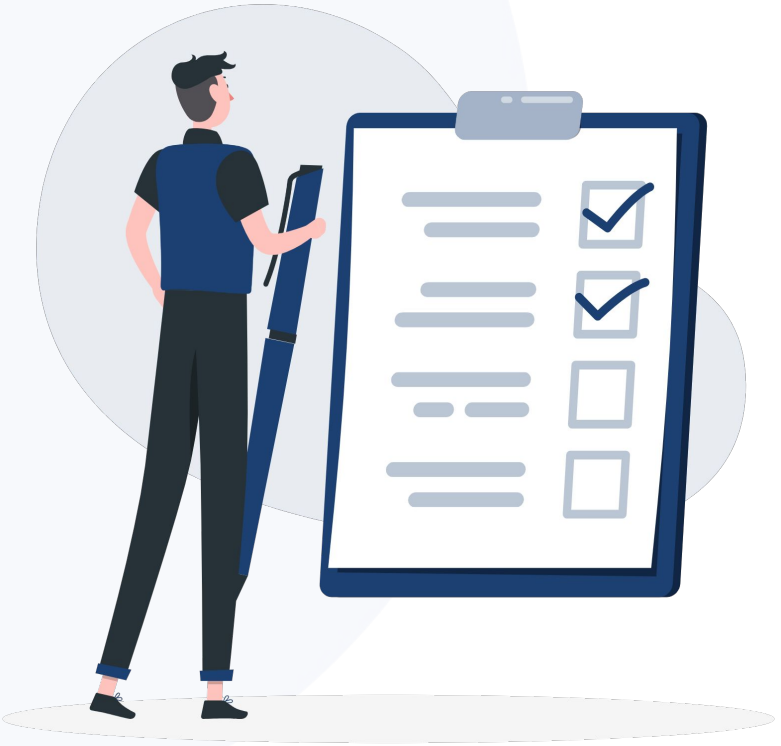
211
Get Connected. Get Help.™

[HMIS Participating Agencies Schedule]

Orange County UNITED WAY

HMIS Participating Agencies Schedule

- HMIS Agency Audit
  - Scheduling July - December
- HMIS Part 2 Recertification
  - Starting in July with a due date of August 30th
- 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



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

211
Get Connected. Get Help.™

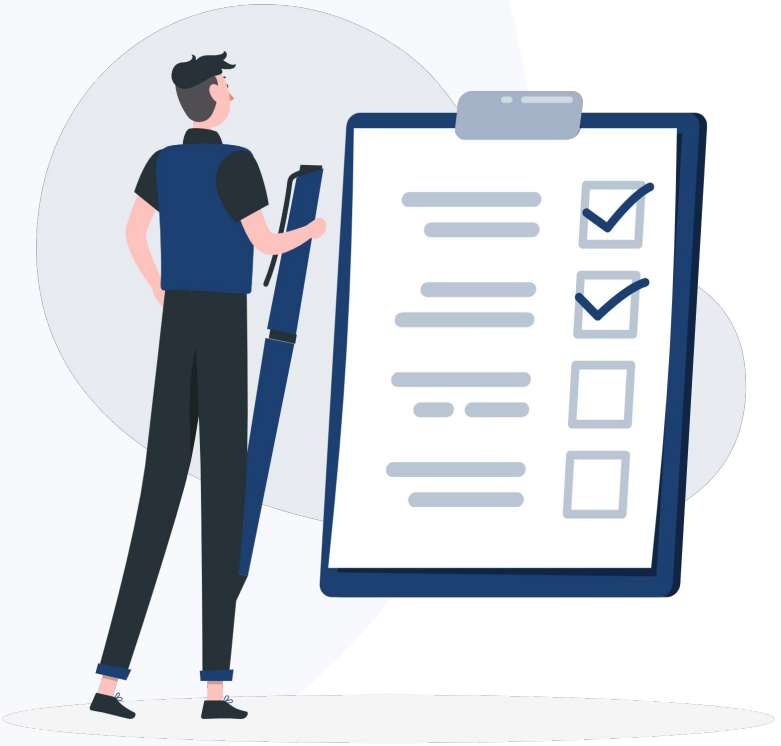
Orange County UNITED WAY

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



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

2025 HIC and Sheltered PIT Submission

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

Please feel free to share your feedback on your experience supporting with the 2025 HIC and Sheltered PIT reporting.

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Updated Privacy Forms

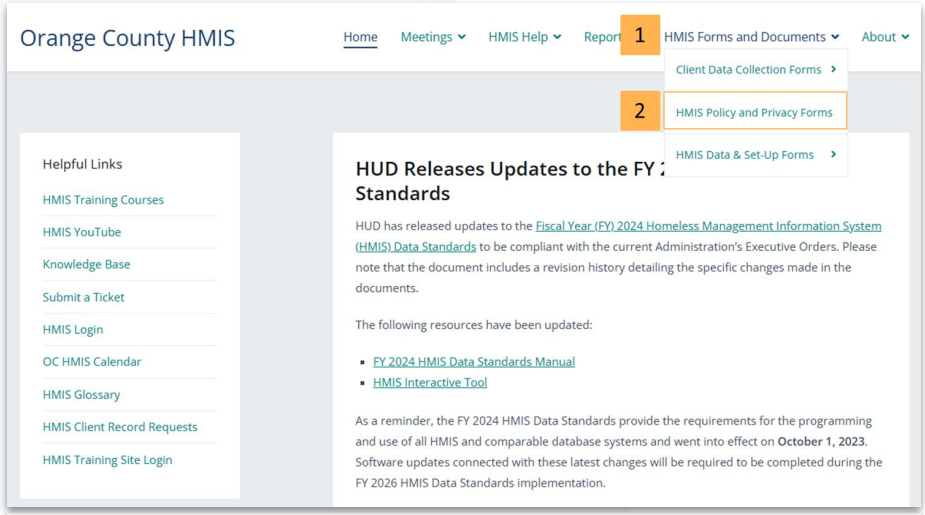
New Privacy Forms are available from the OC HMIS website.

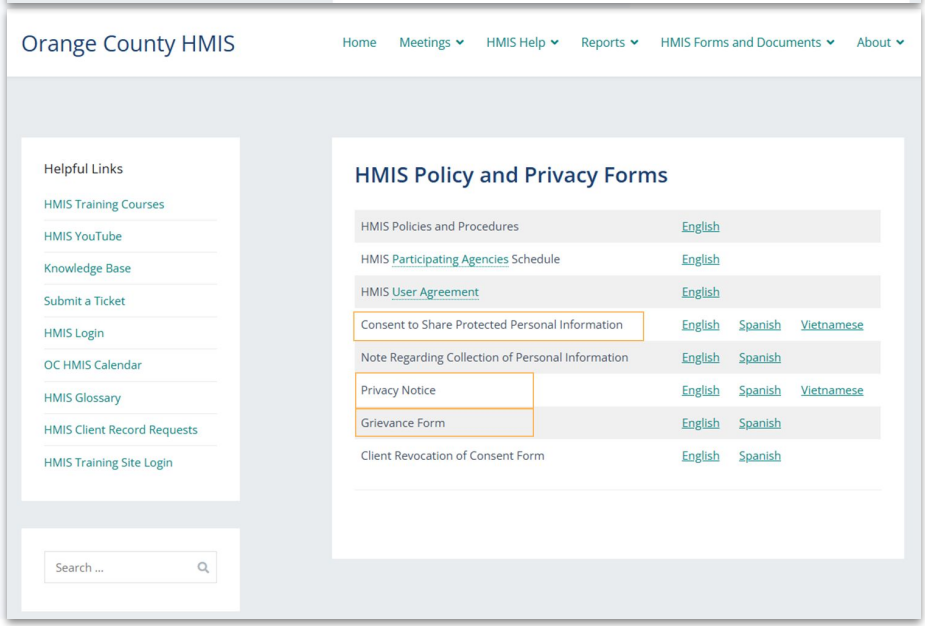
- Consent to Share Personal Information (7/1/25)
- HMIS Grievance Form (05/2025)
- Privacy Notice (05/2025)

HMIS Agency Administrators must update their forms with these latest versions.

To view the latest version of these forms, go to:

- HMIS Forms and Documents and from the drop-down select HMIS Policy and Privacy Forms.





211
Get Connected. Get Help.™

Orange County UNITED WAY

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 tracks 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 this report by navigating to:
Reports > Report Library > Program Based Reports > [GNRL - 409] Annual Assessment Overview

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Annual Assessment Overview Table

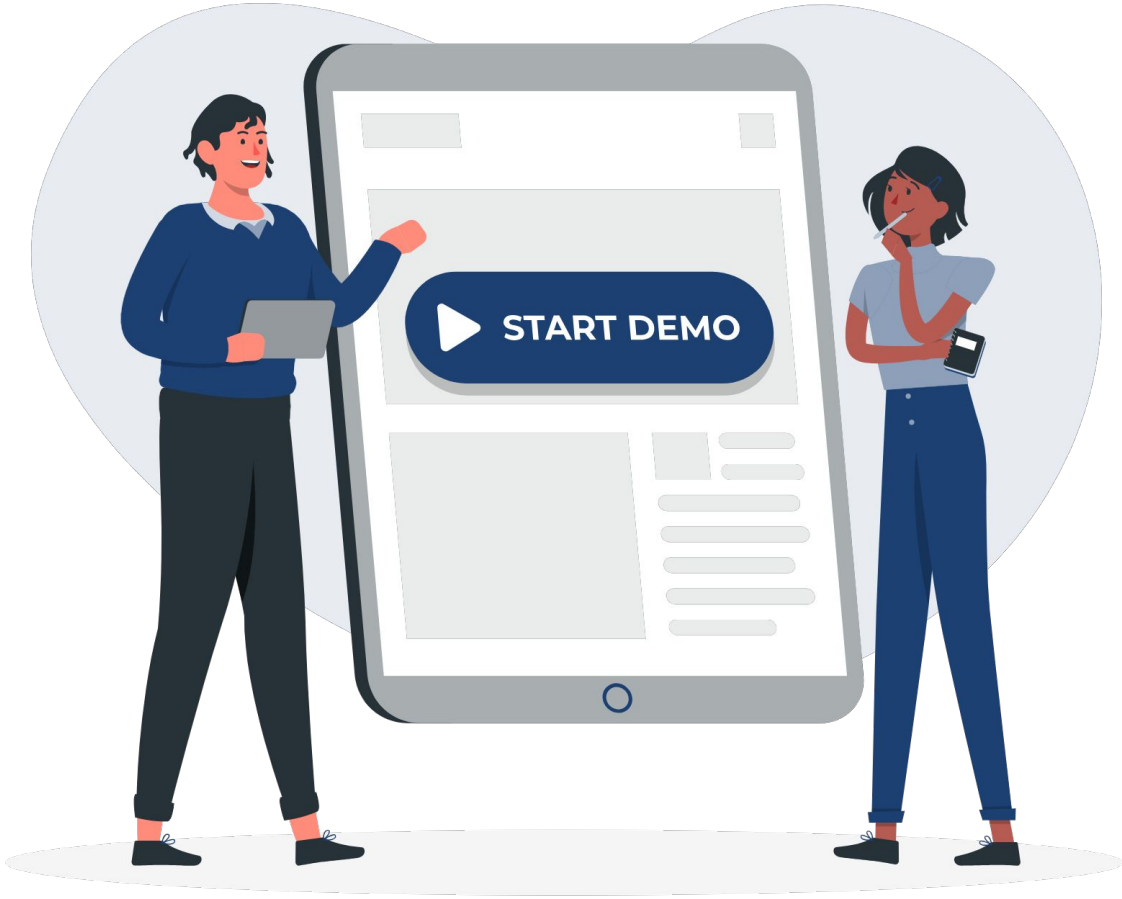
Status	Description
Completed	Completed within the expected timeline (+/- 30 days from anniversary date)
Completed Out of Range	Completed outside of the expected timeline (31+ days from the anniversary date)
Past Due	No relevant completed assessment compared to the anniversary date.
Due	Assessment Due 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

Item	Description
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

Orange County
UNITED WAY

Annual Assessment Overview Demo



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

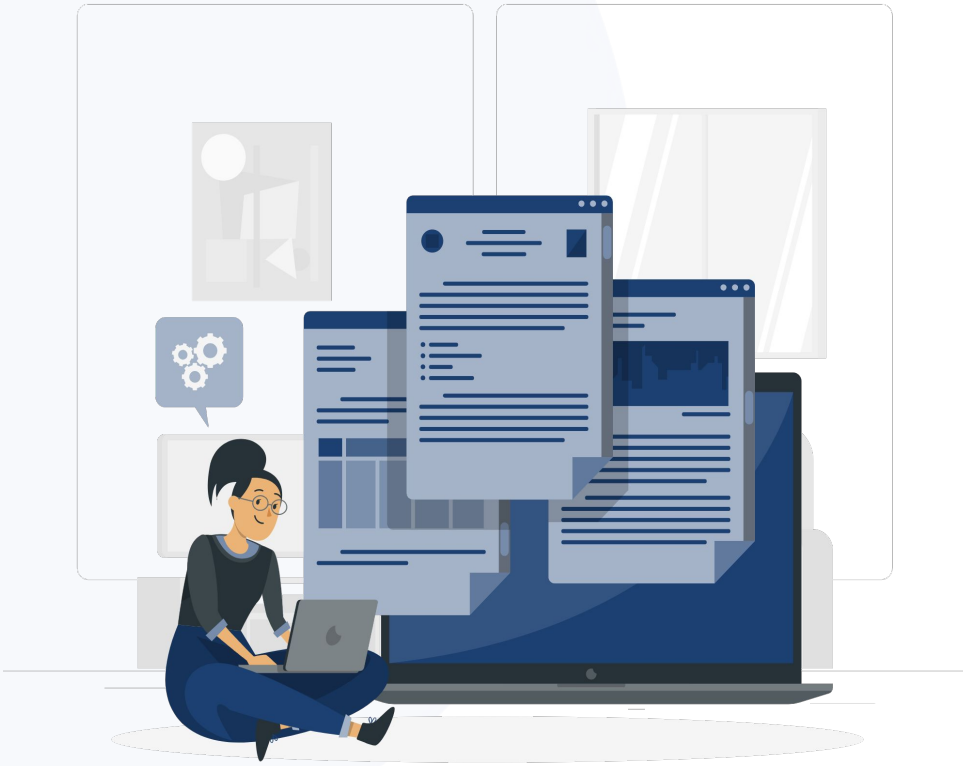
211
Get Connected. Get Help.™

Annual Performance Report (APR)

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.



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

211
Get Connected. Get Help.™

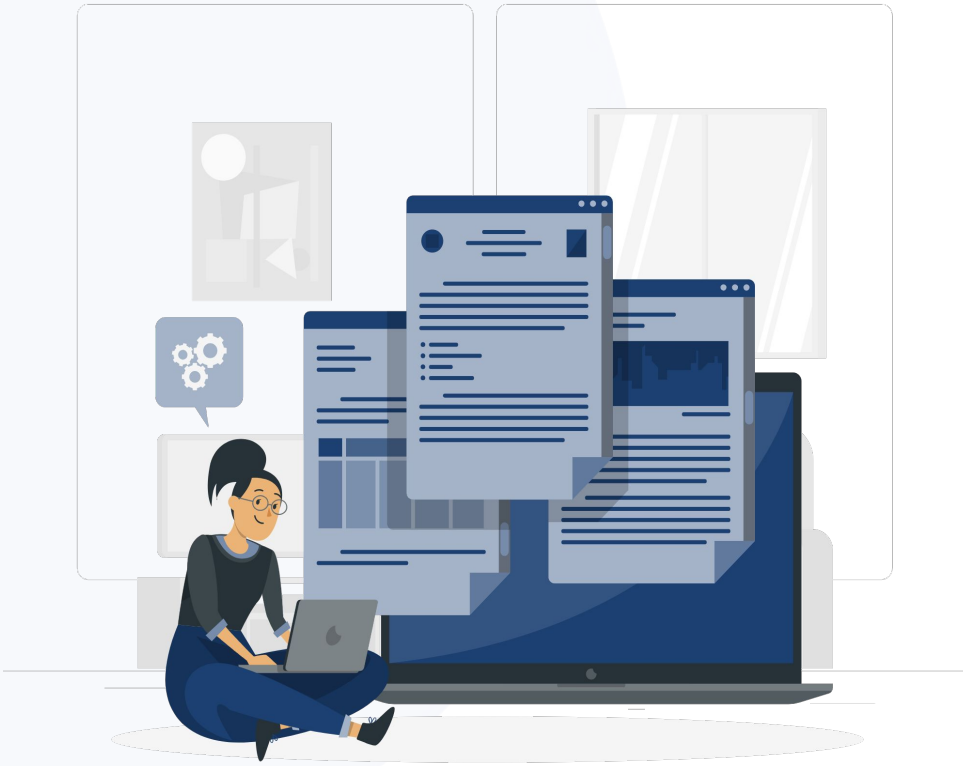
Orange County UNITED WAY

Annual Performance Report (APR)

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.



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

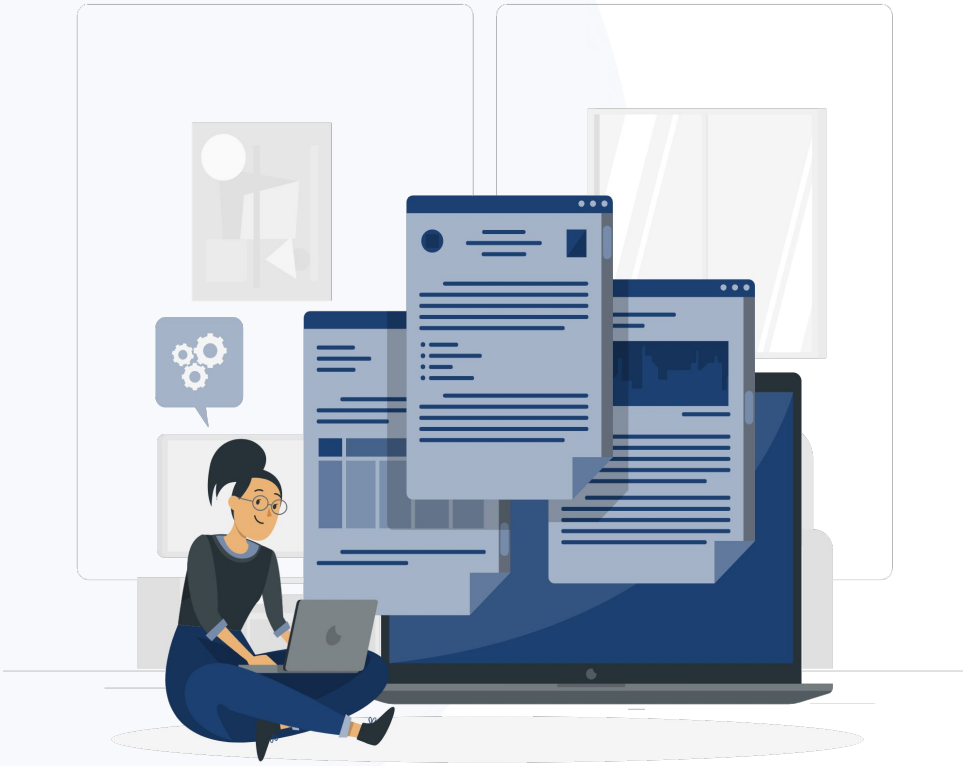
211
Get Connected. Get Help.™

Orange County UNITED WAY

Annual Performance Report (APR)

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.

    - 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.



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

APR Annual Assessment Logic

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.

EXAMPLE:

This household has 3 clients 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.

211
Get Connected. Get Help.™

Orange County UNITED WAY

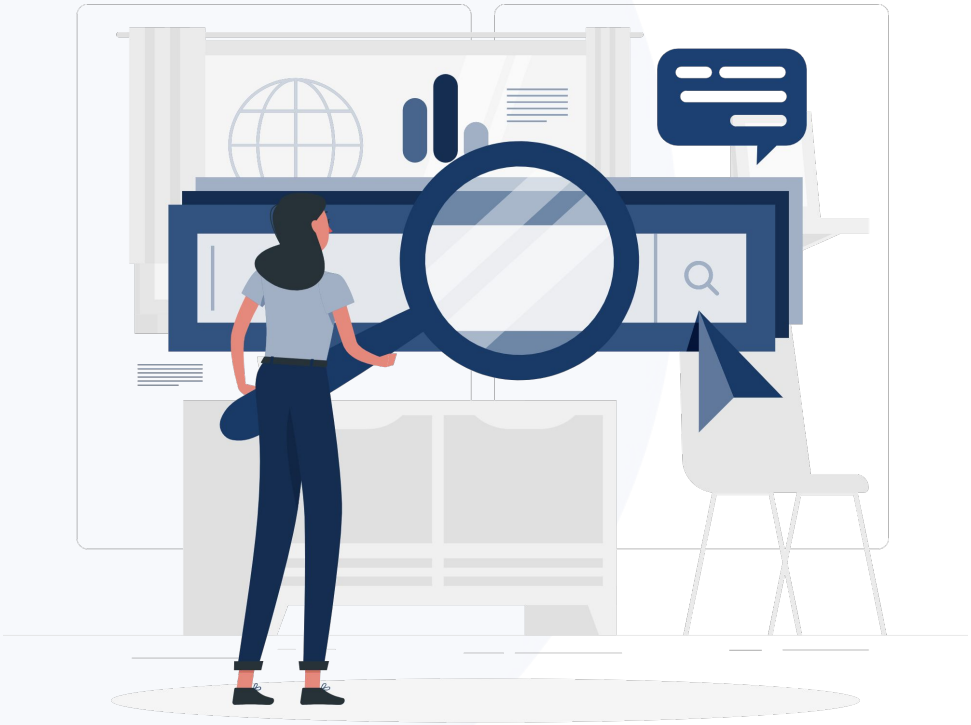
APR Reports Navigation

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



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

2025 Agency Audits

The 2025 HMIS agency audit cycle has officially begun!

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.

211
Get Connected. Get Help.™

Orange County UNITED WAY

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

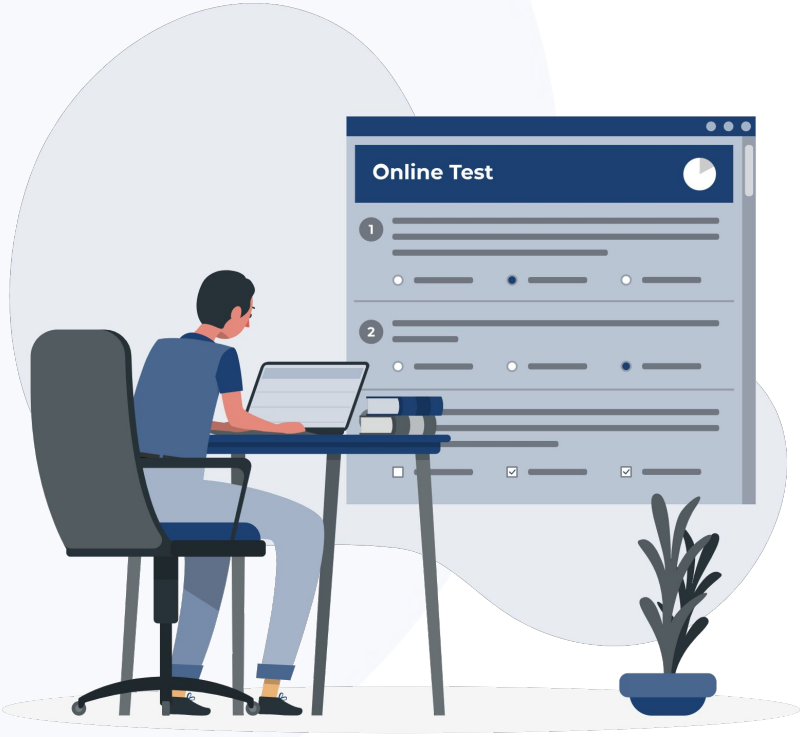
HMIS Part 2 Recertification

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.



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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

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.

More information about this topic can be found in our Deleting Program Enrollment KB article

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Program Move cont.

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.

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

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.

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

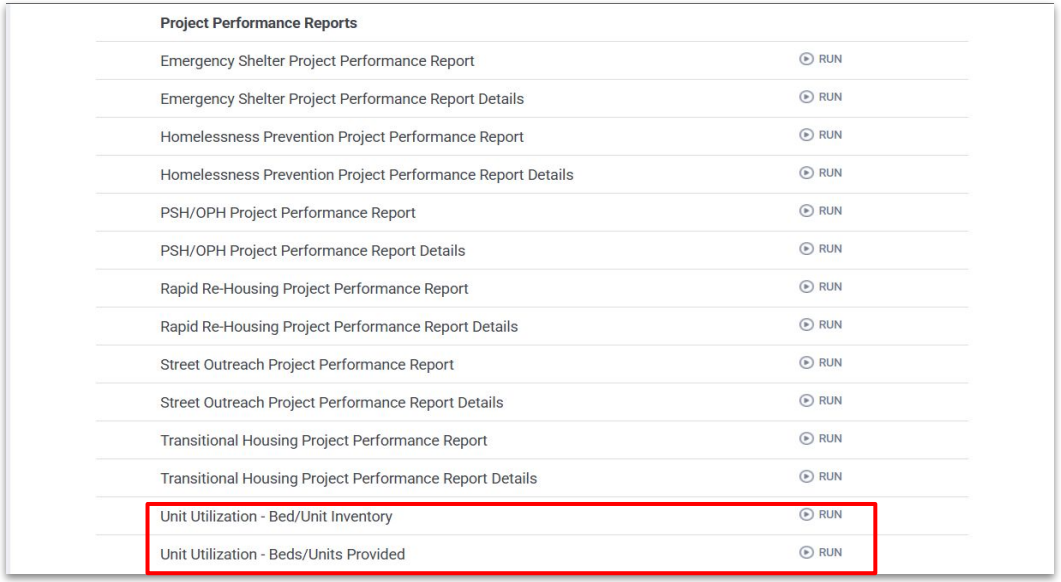
Unit Utilization Reports

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.

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.



211
Get Connected. Get Help.™

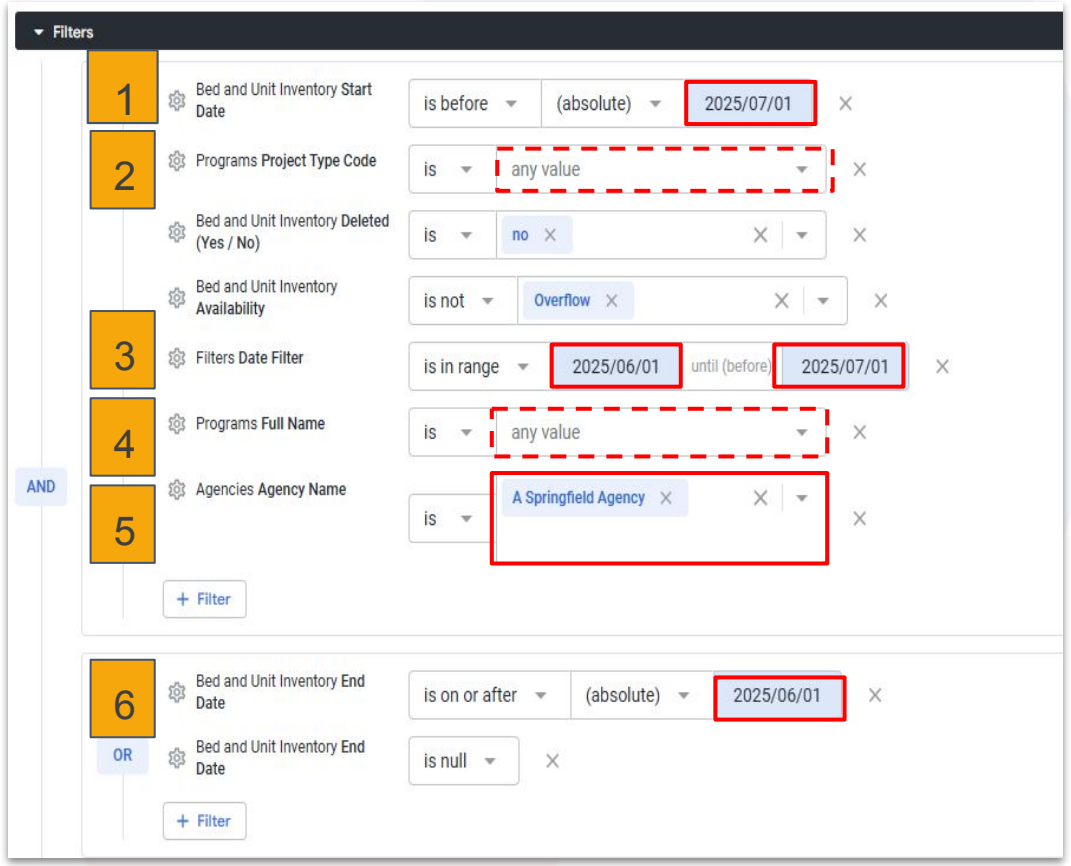
Orange County UNITED WAY

Unit Utilization Reports

Unit Utilization - Bed/Unit Inventory

Example reporting period: 6/1/2025 - 6/30/2025

1. Change the ”Bed and Unit Inventory Start Date is before” the day after the last day of your reporting period.
2. Select the program type(s) to include in your report (optional).
3. Change the ”Filters Date Filter” to the desired reporting period.
4. Select the program name(s) to include in your report (optional).
5. Select your agency name.
6. Change the ”Bed and Unit Inventory End Date is on or after” the first day of your reporting period.
7. Click ***Run*** and ***download the results***



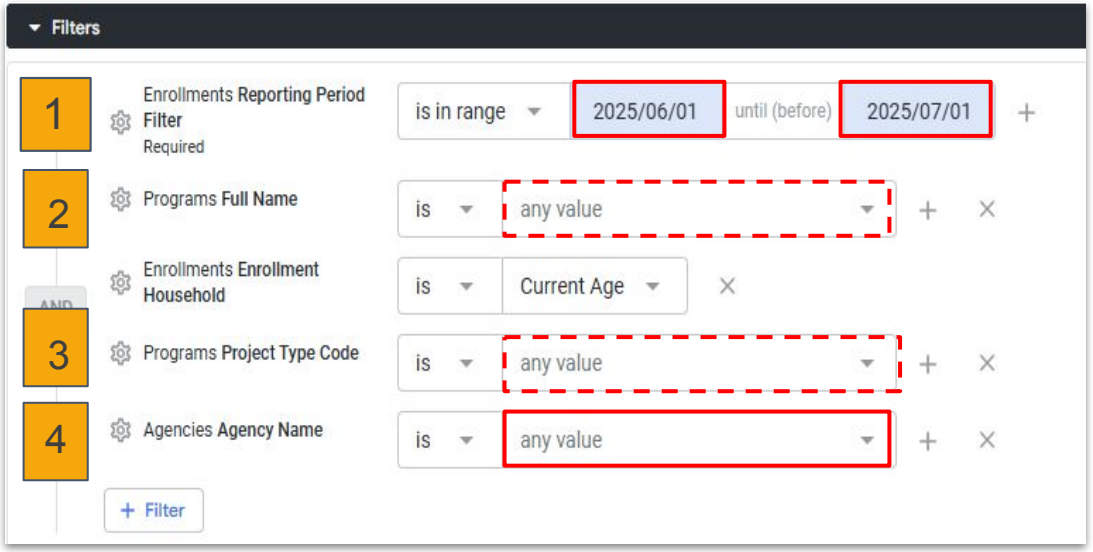
211
Get Connected. Get Help.™

Orange County UNITED WAY

Unit Utilization Reports

Unit Utilization - Bed/Units Provided:

1. Change the ”Enrollment Reporting Period Filter” using the end date as the day after the last day of your reporting period.
2. Select the program name(s) to include in your report (optional).
3. Select the program type(s) to include in your report (optional).
4. Select your agency name.
5. Click ***Run*** and ***download the results***

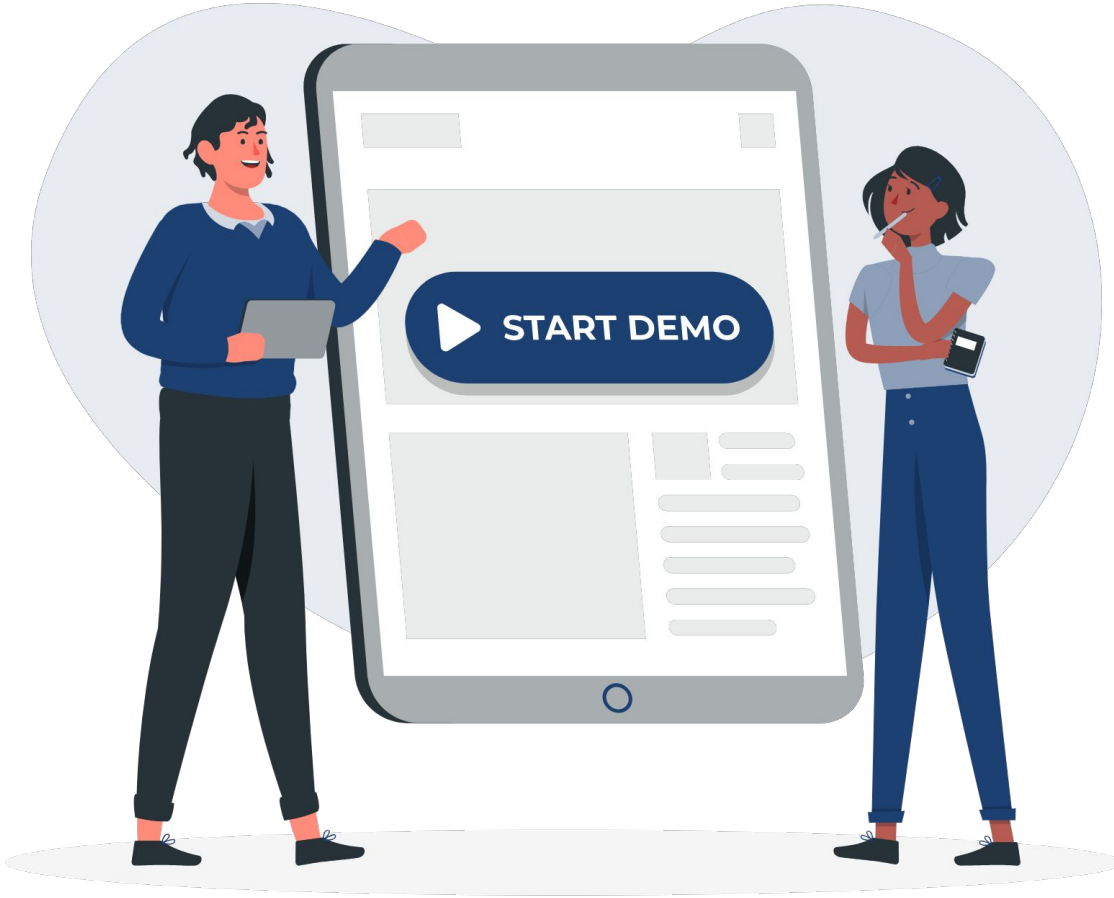


211
Get Connected. Get Help.™

Orange County UNITED WAY

Orange County
UNITED WAY

Unit Utilization Excel Procedure Demo



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

211
Get Connected. Get Help.™

Unit Utilization Reports

- Refer to the Unit Utilization KB for detailed steps.
- We are also working on a video to include in the KB
- A training will be provided during the month to be announced shortly.
- Please reach out in a ticket if you have any issues or questions.

Please review the Unit Utilization Reports KB for step by step instructions.

211
Get Connected. Get Help.™

Orange County UNITED WAY

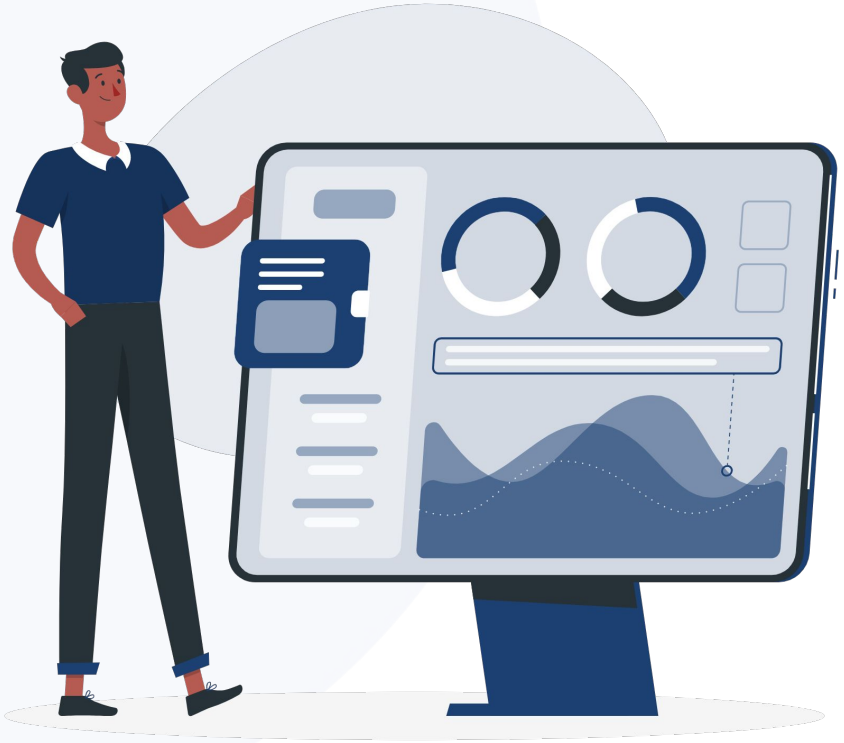
Graphic by: https://storyset.com/online

Project Performance Report (PPR)

- 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



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Resources & Training

July 2025 OC HMIS Trainings:

- **HMIS Report Training - Project Performance Report Goals 1-5**
- Wednesday, July 30th @ 2:00pm -3:30pm. No need to register in advance.

July 2025 HUD Resources:

- Updates to **FY 2024 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.

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

211 Get Connected. Get Help.™

Orange County United Way

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/pFsYQArmMMR3B1hX7

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Holidays Observed

The HMIS Helpdesk will be closed on **Friday, July 4th** in observance of the **Fourth of July holiday**.

We will be back in office Monday, July 7th, to assist you.

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Q&A

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Thank you
Have a great day!

Next User Meeting: August 6th

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Orange County
UNITED WAY