

November 2025 OC HMIS User Meeting

211

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Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Data Entry & Performance Impact
3. Privacy and Personal Identifying Information Guidance
4. HMIS Client Record Sharing Decision Pathways
5. Audit Reminder
6. Client Record Request Form
7. Inactive Users in HMIS
8. System Performance Measures (SPM) and Longitudinal System Analysis (LSA)
9. Annual Performance Report
10. Project Performance Report
11. Training and Resources
12. HMIS Privacy Forms
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 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

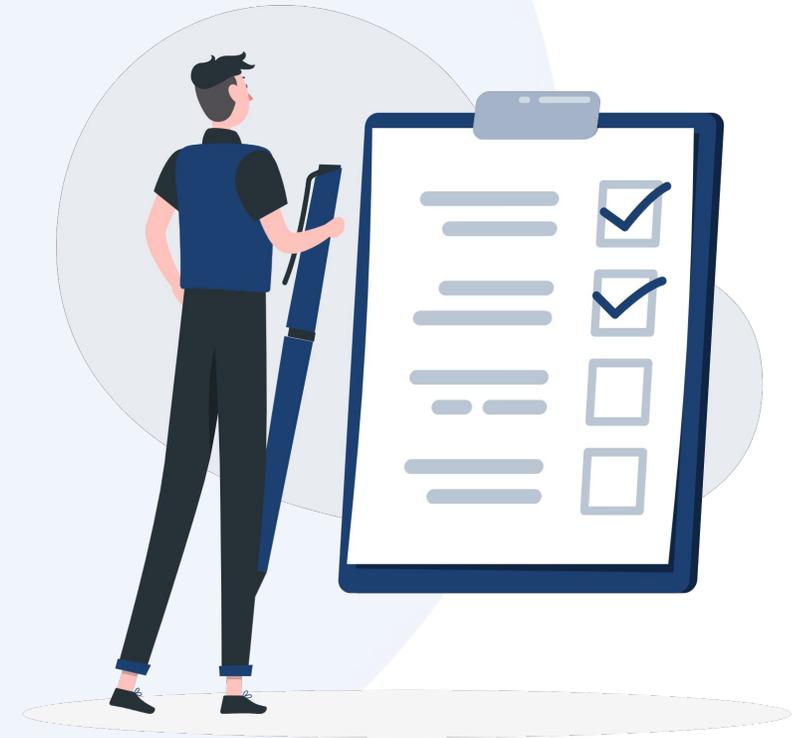
HMIS Participating Agencies Schedule																		
 																		
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December	
HUD Required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

HMIS Participating Agencies Schedule



HMIS Participating Agencies Schedule

- HMIS Agency Audit
 - Scheduling July - December
- Project Performance Report (PPR) Corrections
 - Transitional Housing will be added to your agency's DropBox shortly
 - If you don't have a Goal 10 spreadsheet in DropBox, your agency didn't have any exit data during the reporting period of 10/01/2023 - 09/30/2025
 - Please review the [PPR Webinars](#) for additional information about running and review PPR Goals 1 - 10 for your agency's programs

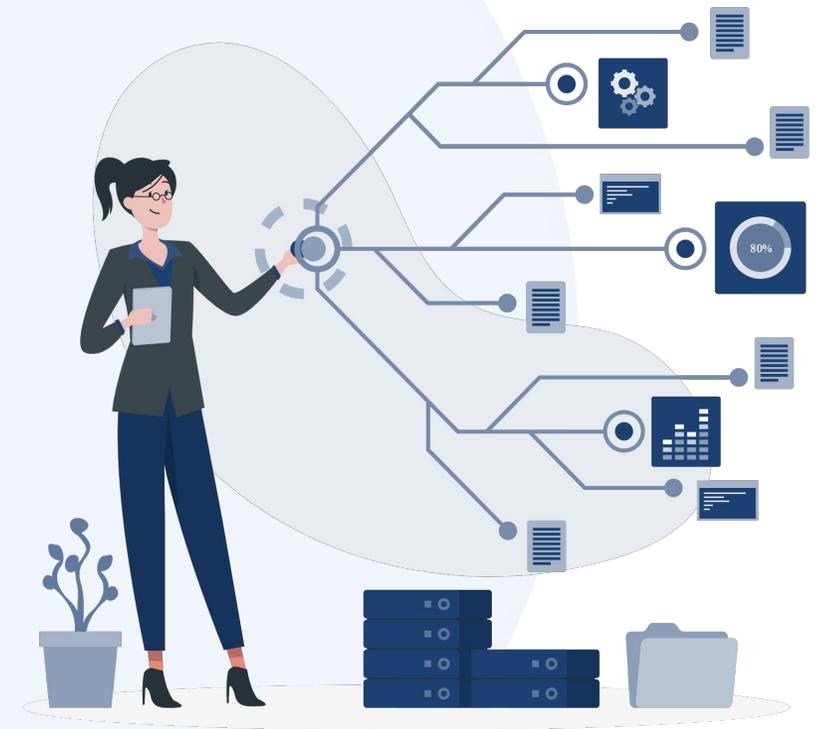


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Reminder: HMIS Data Entry & Performance Impact

Data entered into HMIS is used to understand the characteristics of people served through the OC System of Care, and how effectively clients are being served through this system of care.

- Federal and State level: Data is aggregated for Orange County and submitted to inform how effectively our CoC is addressing homelessness as a system of care. Results of these reports impact the amount of funding our CoC will receive from these entities.
- Local level: In addition to reviewing data at the county-level, data is also aggregated at the project-level to inform how effective specific projects are at serving their clients. Local funders use this data to determine which agencies and projects they want to fund.



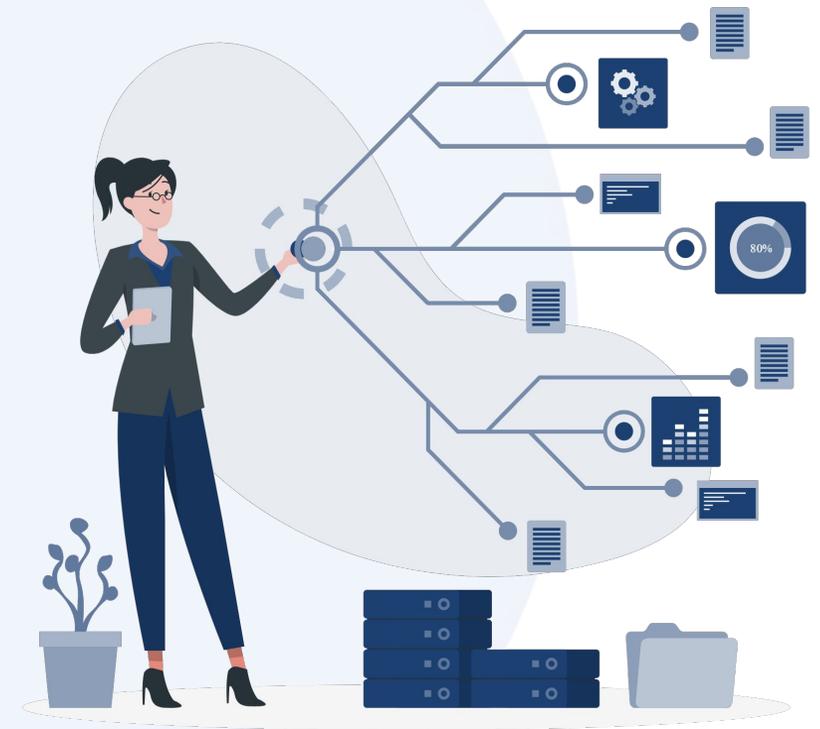
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Reminder: HMIS Data Entry & Performance Impact

This means that accurate and complete data entry into HMIS is critical to ensure that your agency, and our CoC as a whole, continues to receive the funding needed to address homelessness in our community.

Data Entry & Data Quality Best Practices:

- Search for client records in HMIS prior to entering new clients to avoid duplicate profiles for the same client
- Confirm name spelling and review client documentation (if possible) to reduce data entry errors for Name, Date of Birth, and Social Security Number
- Enter data into HMIS directly instead of collecting data on a paper form
- Run data quality and performance reports at least quarterly to correct errors and identify areas for additional training
- Review data quality and performance correction files sent from the HMIS team, and update HMIS as needed
- Review knowledge base articles and training materials to understand how to collect specific data elements



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Reminder: Privacy and Personal Identifying Information Guidance

A reminder about Client Privacy and Personal Identifying Information

Best practices for sharing client information:

- Users should only use the **client's unique identifier** to identify clients in correspondence. This includes HMIS tickets, reports, work emails, and work related instant messaging apps.
- If users must share additional client information such as name, date of birth, or Social Security Number in a report or correspondence, please use an encrypted email or password protected file on your work network. If you are sending a report to HMIS, please use your agency's DropBox.
 - [Sending Client Information to the HMIS Help Desk](#)



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Privacy and Personal Identifying Information Guidance

Ways of sharing Client Information

If you need to share a screenshot to demonstrate the issue you are having in a ticket, provide the client's ID and in the screenshot only share the relevant information. In the first example, all client information is being shared, do not share this type of screenshot in tickets or emails.

The screenshot displays a client profile for Leto Atreides. The top navigation bar includes tabs for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, FILES, SERVICES, CONTACT, and LOCATION. The current program is 'NON-FEDERALLY FUNDED STREET OUTREACH TRAINING PROJECT'. Below this, there are tabs for Enrollment, History, Assessments, Goals, Notes, Files, and Forms. The main content area shows a 'HISTORY:EDIT' section with a table of service records. To the right, there is a 'Household Members' section with a 'Manage' button. The household members list is highlighted with a red box, showing Paul Atreides (Son), Jessica Harkonnen (Significant Other), and Alia Atreides (Daughter). Below this is an 'Active Programs' section showing 'Homekey Emergency Shelter' and a 'Recent Services' section showing 'Food: Bag of Groceries'. The bottom of the page has 'SAVE CHANGES' and 'CANCEL' buttons.

Service Name	Food
Service Item	Bag of Groceries
Category	Food
Delivery Type	Single Event
Agency	OC Training Agency (Entered by: Diana Taylor)
Event Date	10/16/2024

Household Member	Relationship
Paul Atreides	Son
Jessica Harkonnen	Significant Other
Alia Atreides	Daughter



Privacy and Personal Identifying Information Guidance

Ways of sharing Client Information

In the second example, all of the client information was erased using Microsoft Paint. This is an acceptable screenshot to share via a ticket or email.

The screenshot shows a web application interface for client management. At the top, a dark blue navigation bar contains a search icon, a mail icon, the user name "Diana Taylor, System", and a "DT" profile icon. Below the navigation bar is a menu with options: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, FILES, SERVICES, CONTACT, and LOCATION. The main content area is divided into two sections. The left section, titled "PROGRAM: NON-FEDERALLY FUNDED STREET OUTREACH TRAINING PROJECT", has a sub-menu with "Enrollment", "History", "Assessments", "Goals", "Notes", "Files", "Forms", and "Exit". Below this is a "HISTORY:EDIT" section with a form containing the following fields: Service Name (Food), Service Item (Bag of Groceries), Category (Food), Delivery Type (Single Event), Agency (OC Training Agency (Entered by: Diana Taylor)), and Event Date (10/16/2024). At the bottom of this form are "SAVE CHANGES" and "CANCEL" buttons. The right section, titled "Household Members", has a "Manage" button and a table with three rows: a redacted name with "Son", a redacted name with "Significant Other", and a redacted name with "Daughter". Below this are sections for "Active Programs" (Homekey Emergency Shelter) and "Recent Services" (Food: Bag of Groceries). Two orange arrows point to the redacted areas: one in the top navigation bar and another in the Household Members table.

Privacy and Personal Identifying Information Guidance

Ways of sharing Client Information

In the third example, the screenshot is only taken of the relevant information for the service. No client information is visible in the screenshot.

PROGRAM: NON-FEDERALLY FUNDED STREET OUTREACH TRAINING PROJECT

Enrollment History Assessments Goals Notes Files Forms × Exit

HISTORY:EDIT

Service Name	Food
Service Item	Bag of Groceries
Category	Food
Delivery Type	Single Event
Agency	OC Training Agency (Entered by: Diana Taylor)
Event Date	10/16/2024 

SAVE CHANGES CANCEL

Privacy and Personal Identifying Information Guidance

Ways of sharing Client Information

Another of method sharing is the direct link for the client so you don't need to be concerned about accidentally sharing client information in a screenshot.

The client's profile, all of the programs, services, assessments, and any other items in HMIS have a unique url that you can use to load that screen. These examples are all for the same client which contains the unique identifier 033317093

<https://octrain.clarityhs.com/client/033317093/profile> - Client's profile screen

<https://octrain.clarityhs.com/clients/033317093/program/35680/enroll> - This is the enrollment screen for the client.

<https://octrain.clarityhs.com/client/033317093/service/18211/edit> - This is the service that was provided during the client's program enrollment.

<https://octrain.clarityhs.com/clients/033317093/program/35680/end/75526> - This is the exit screen for the client.

HMIS Client Record Sharing Decision Pathways

The OC HMIS Team has updated the following Knowledge Base Articles with [Client Record Sharing Decision Pathways](#).

- [Accessing and Completing the ROI fields of Client Record](#)
- [Refusing/Revoking Consent to Share Protected Personal Information Knowledge Base Articles](#)
- [Adding Client Profiles to HMIS](#)

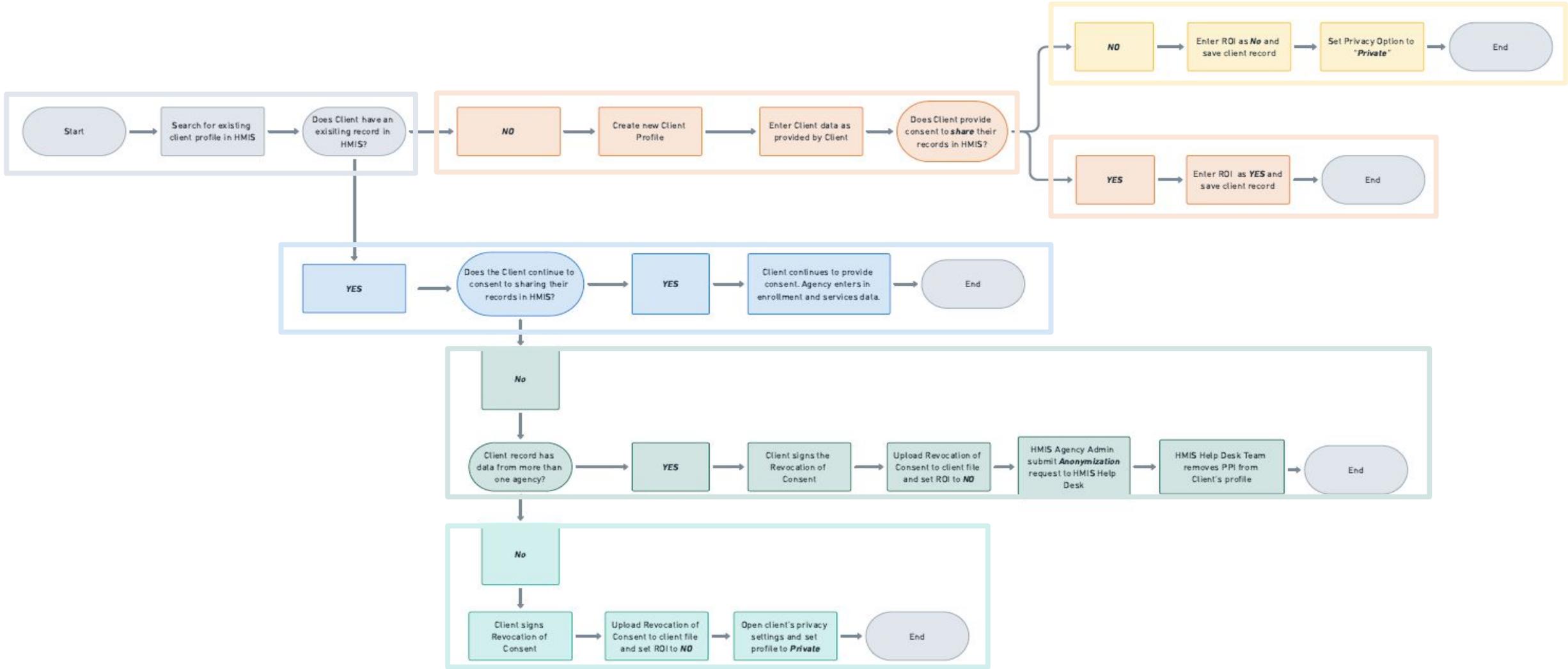
The decision pathway describes how to handle HMIS record privacy settings based on the client's decision to have a public or private record.

Please review the [HMIS Client Privacy and Data Ethics Training](#) for additional information.



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HMIS Client's Record Sharing Decision Pathways



2025 Agency Audit

We are coming to the end of the audit season. Thank you to the agencies that have already participated and have provided good feedback to our team.

If your agency is in the process of scheduling your agency audit, please be aware that with the upcoming holidays, events, and reporting it is important to confirm a meeting date in advance.

If your agency has not received a ticket to schedule an audit, we will be sending those requests out shortly.



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Client Record Request Process - Client Record Request Form

The Client Record Request Form is to be used when a client wants access to data in their HMIS record that the submitting agency does not have access to.

Here are next steps based on the scenario your agency may encounter when supporting a client to receive their OC HMIS records.

It's advised that agencies review the [Client Record Requests KB](#) for additional information and to have an open discussion with the client on the data they would like to receive.

- Client is enrolled at Agency B, and wants their data that was entered in by Agency B.
 - Agency B has access to pull their agency data to share with the client.
- Client is enrolled at agency B and wants their data that was entered by agency B and their entire enrollment history for agencies A-Z.
 - Agency B does not have access to pull other agency data. Agency B will review the Client Record Request Form with the client and assist with submitting the form on behalf of the client.

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Orange County

Client Record Request Form

This form must be submitted by an Agency Administrator at an agency currently participating in OC HMIS, and should only be used when a client wants to access data in their HMIS record the agency submitting the form doesn't have access to.

Prior to submitting this form, talk with the client to determine the specific data they want to receive. Review the [Client Record Requests](#) knowledge base article to determine whether the request can be fulfilled without submitting this form.

Clients do not need to provide a reason for wanting their HMIS record.

Agency Name * Agency Administrator Name *

Agency Administrator Email Address * Agency Administrator Phone Number *

Client's HMIS Unique ID *

What data would the client like to see from their HMIS record? *

Client Record Request Dashboard - Demographics, Release of Information, Enrollment History, Contact Information, and Uploaded Documents

Client responses to assessments completed at entry, exit, or at anytime during their enrollment

Data collected by a Service Provider regarding the client, including Services, Public Alerts, and Locations

Coordinated Entry data, including status, history, and events

Only data entered in the HMIS record for the client ID above will be provided.

Client Record Request Process - Expected Data Review Practices

When reviewing HMIS data with clients in person, Agency Admins are expected to follow these practices:

- Verify the client's identity
- Ensure meeting place is private where the discussion cannot be overheard by others
- Explain each file and what information is collected
- If a client requests a revision(s) to data, follow the Client Data Revisions section
- If printed copies were made, ensure to shred these documents after the client review

Please see the [Client Record Requests KB](#) for details on each of these practices.

Client Record Request Process - Client Records Reports

Client Records Reports are files from reports that the HMIS Team will provide to the Agency Admin after the Client Record Request Form is submitted. This is to be reviewed with the client.

The report may include the following based on what the client requested to review:

- Client Profile and Contact Information
- Enrollment History
- Release of Information
- Client Documentation
- Responses on client assessments
- Services, public alerts, and locations
- Coordinated Entry Data

Inactive Users in HMIS

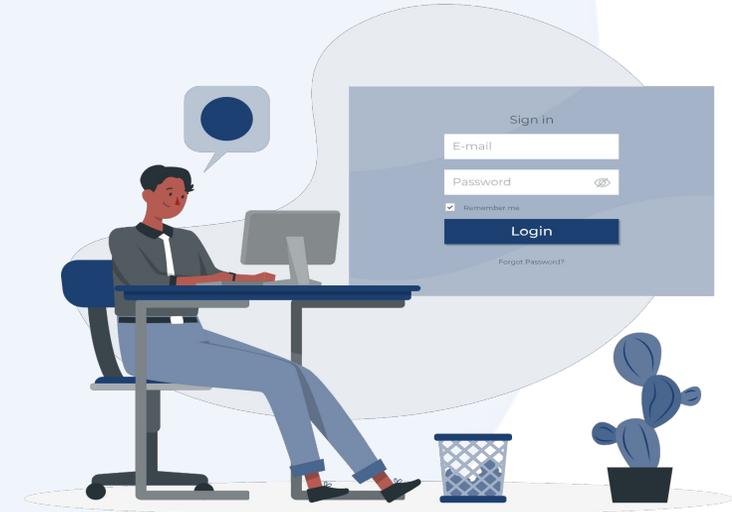
Clarity automatically locks user accounts after a period of inactivity of more than 60 days. Users will receive a notification two (2) calendar days prior to their account being locked. It is recommended that users set a calendar reminder to prompt them to log in once per month.

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 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](#) to determine which course(s) are needed per access role.

60
Days



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Inactive Users in HMIS Cont.

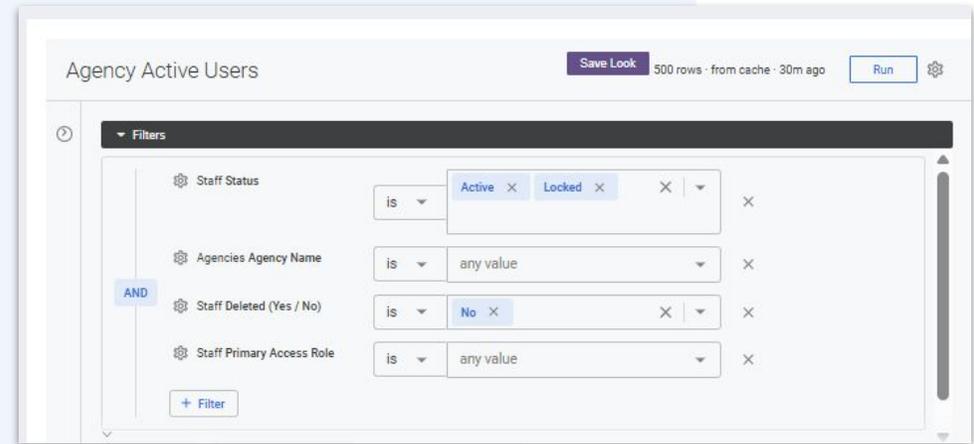
If users at your agency were locked out during the Recertification task, it is because it has not yet been completed. These users will need to retake HMIS Part 1 and Part 2 Training courses in addition to the Skills Test to have their accounts reactivated.

Agency Administrators (AAs) can run the Agency Active Users Report to see a list of users that active accounts with their agency. If you see a user missing from the list, their account may be locked or inactive. Please submit a HMIS Helpdesk for additional support.

Report Pathway: Launchpad > Reports > Data Analysis > User Management > Agency Active Users

The Agency Active Users report has a NEW update that allows you to see the Staff's Last Visited Date.

AAs and program managers can now review and support their teams with reminders.



System Performance Measures (SPM) and Longitudinal System Analysis (LSA)

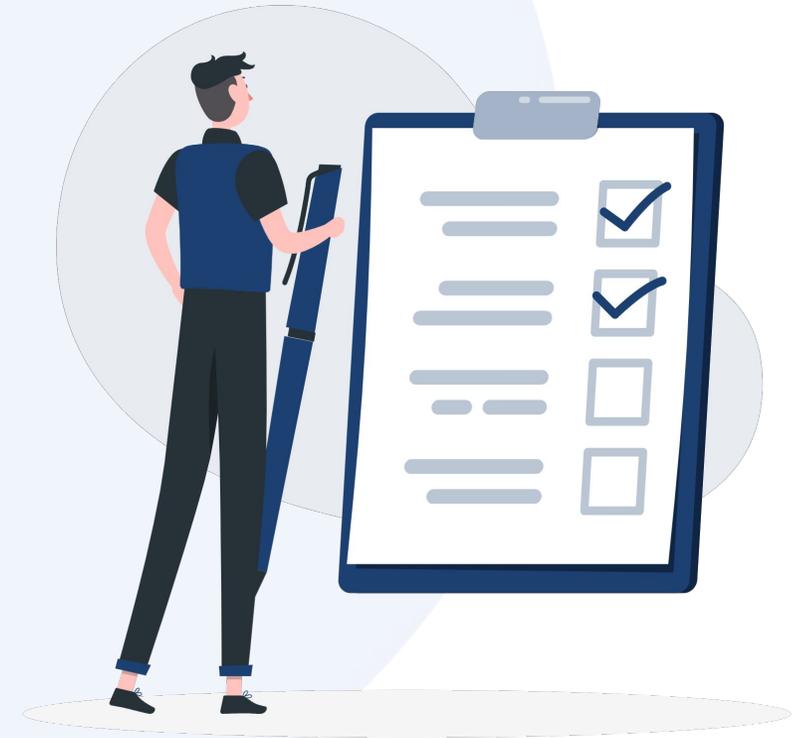
Longitudinal System Analysis (LSA)

The LSA is a report submitted by each CoC on an annual basis, and includes demographic, performance, and household composition information, as well as patterns of system use. The LSA from each CoC is consolidated to create the AHAR that is submitted to Congress.

System Performance Measure (SPM)

The System Performance Report analyzes the performance of Safe Haven, Street Outreach, Emergency Shelter, Transitional Housing, and Permanent Housing (including Permanent Supportive Housing, Rapid-ReHousing, and Other Permanent Housing) project types in the Orange County CoC that participate in HMIS.

Please review the [Sept 2025 HMIS Report Office Hours](#) materials that covers SPM & LSA corrections.



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Longitudinal System Analysis (LSA) Timeline

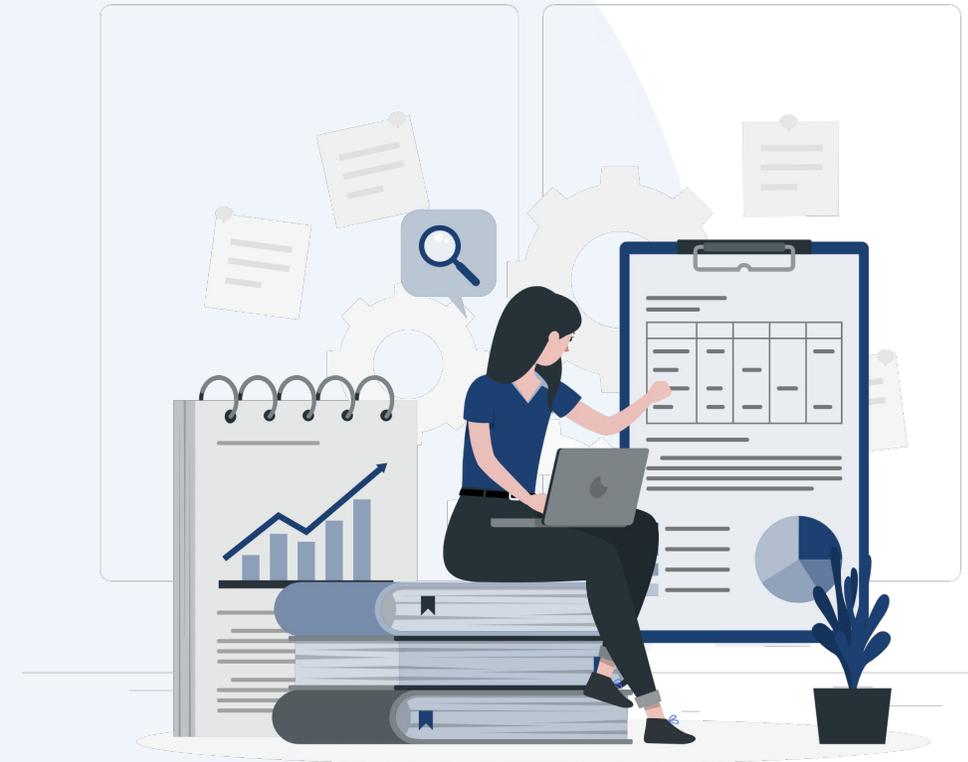


Annual Performance Report (APR)

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.



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APR - Annual Assessment Errors

Annual assessments for clients who are enrolled in a project for more than 364 days are calculated 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. As such, all household members must have an annual assessment completed within -/+ 30 days of the project anniversary date.

EXAMPLE:

This household has 3 clients outlined below:

Client A: HoH | Project Start Date: 11/1/24

Client B: Spouse | Project Start Date: 2/1/25

Client C: Child | Project Start Date: 2/1/25

The anniversary date for this household will be 11/1, until they are exited.

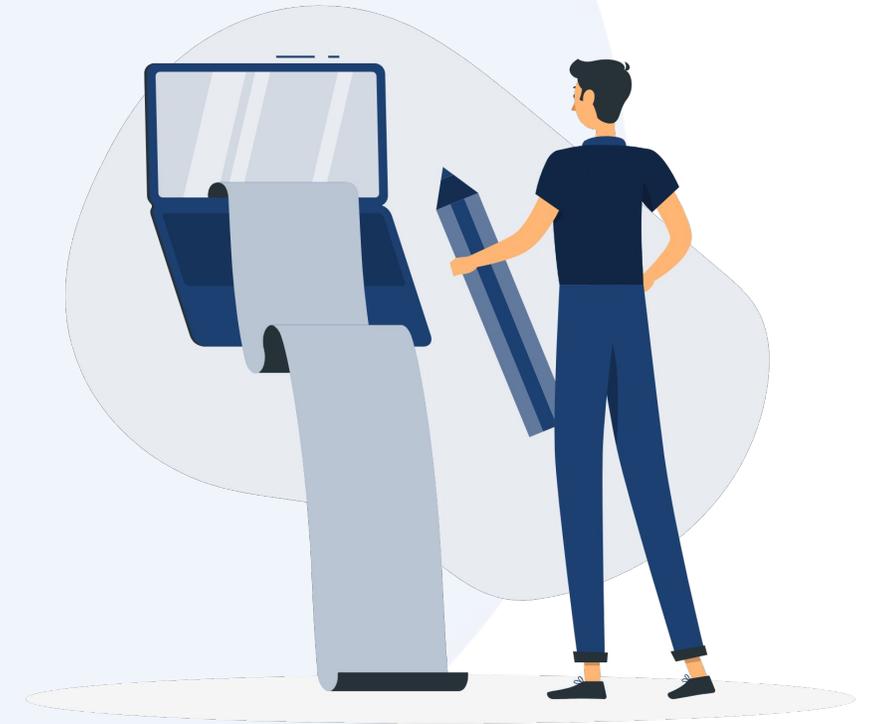
In 2025, annual assessments should be completed for all household members within -/+ 30 days of 11/1/25

APR - Sex Data Element Errors

Starting on **10/01/25**, HMIS participating agencies are expected to collect data for the [4.21 Sex Data Element](#) for all new project enrollments. Any new clients whose *Sex Data Element* was not collected will appear with a 'data not collected' error within the APR.

Clients with an active project enrollment prior to **10/01/25** are not required to have their *Sex Data Element* collected. If a 'data not collected' error appears for these clients, agencies should reach out to their funder or HUD representative for additional guidance on best data collection practices.

Users should review the [HMIS Data Collection Requirements for Transition to FY 2026 HMIS Data Standards](#) guide for additional information.

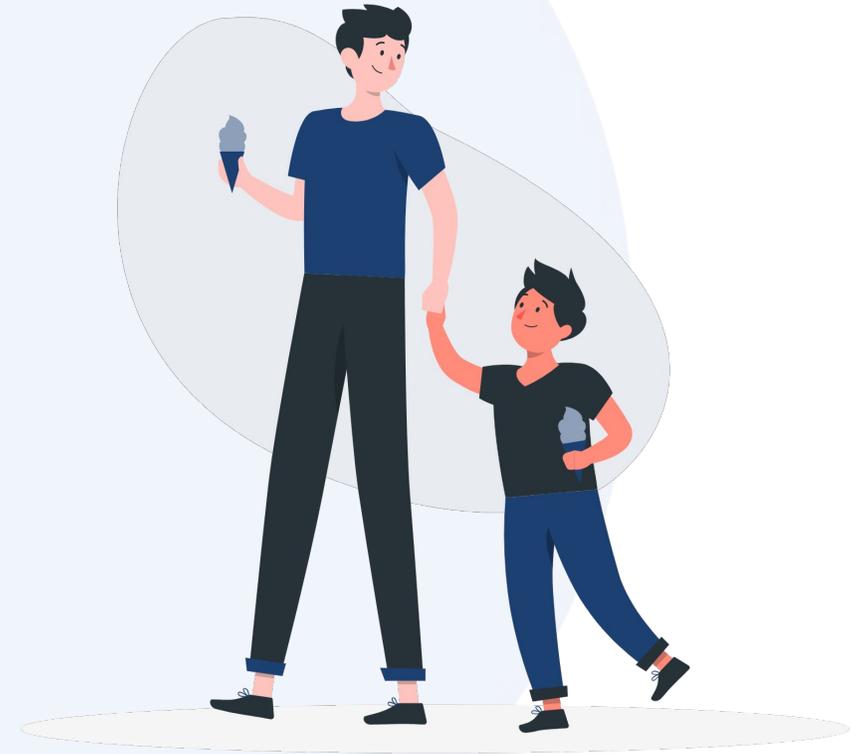


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APR - Child Errors

The following should be taken into consideration for child clients as users review their APR's.

1. Client ages into adulthood - Child 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.
2. Approximate Date Homelessness Started - Child clients born after the HoH's *Approximate Date of Homelessness Started* do not inherit that information from the HoH, an explanation for this error should be provided within the APR narrative
3. Chronic Homeless Status - Child clients who were not present with the HoH at project start do not inherit a *Chronic Homeless Status*, an explanation for this error should be provided within the APR narrative



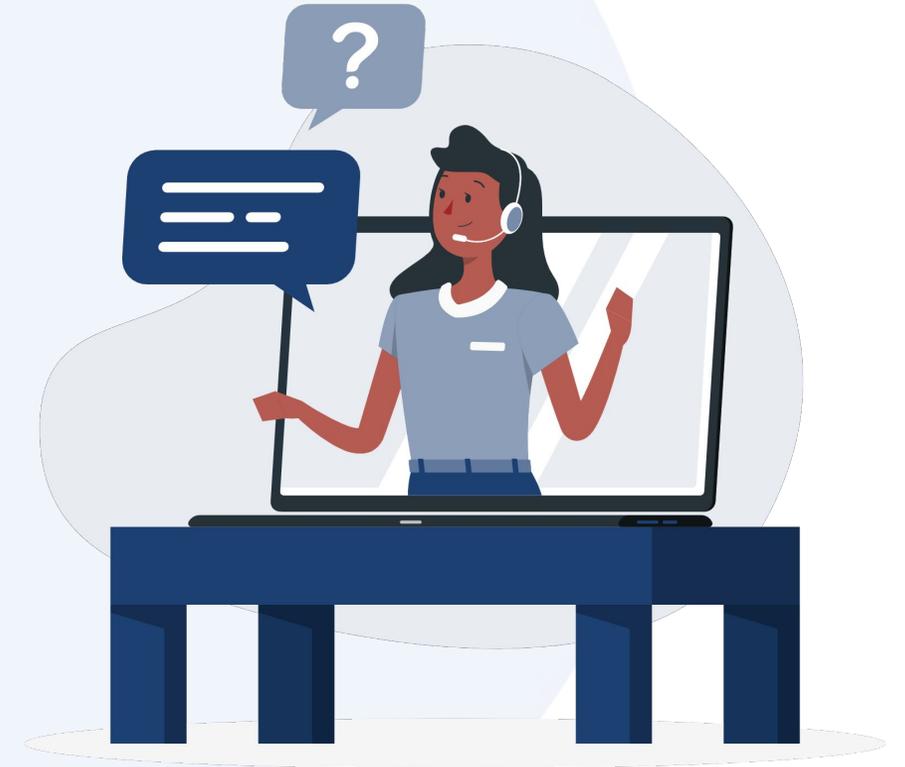
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APR - Resources

For additional information regarding the APR, users can reference our [Running a CSV Export](#) and [APR: Chronic Homeless Status for Children](#) KB articles.

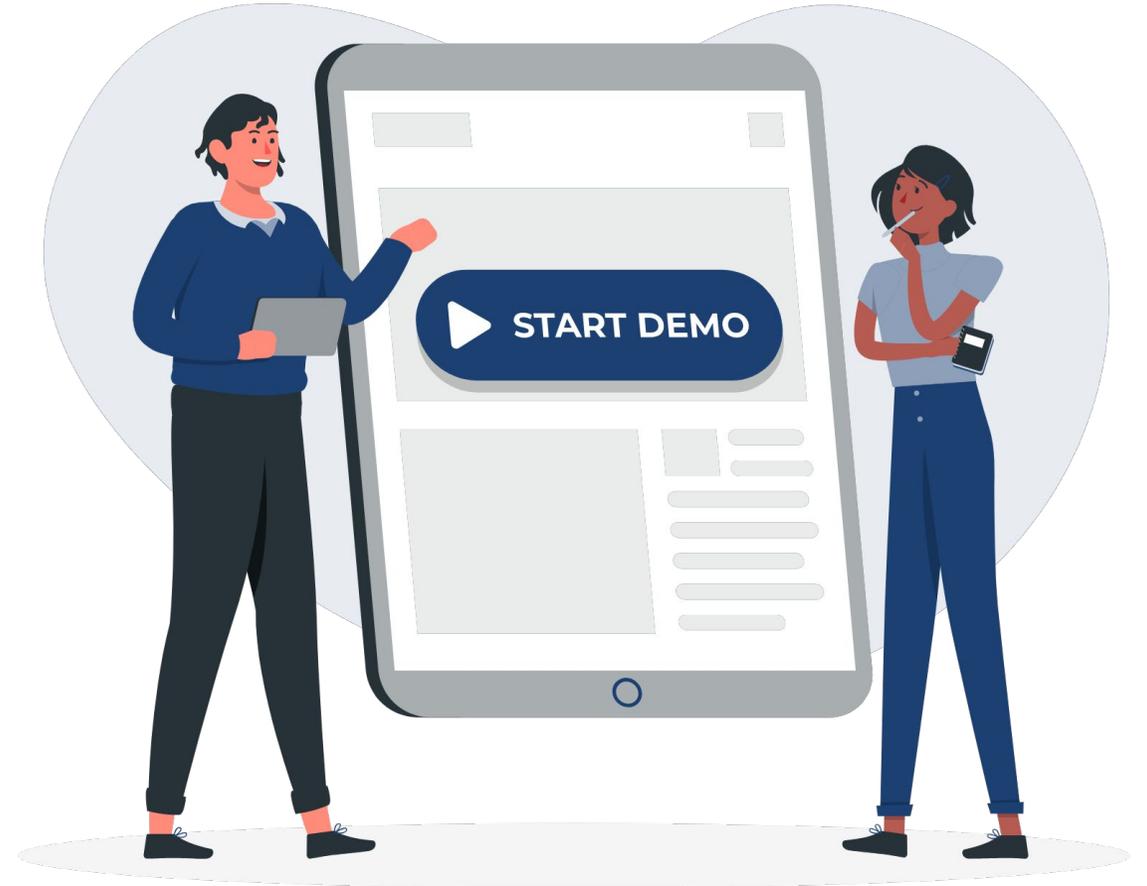
To run the **APR Submission Preparation Dashboard** users can navigate to: Reports > Data Analysis > Built In Reports > APR Submission Preparation

To run the **HMIS Data Quality Report** users can navigate to: Reports > Report Library > HUD Reports > [HUDX-225] HMIS Data Quality Report



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

APR Submission Preparation Dashboard Demo



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

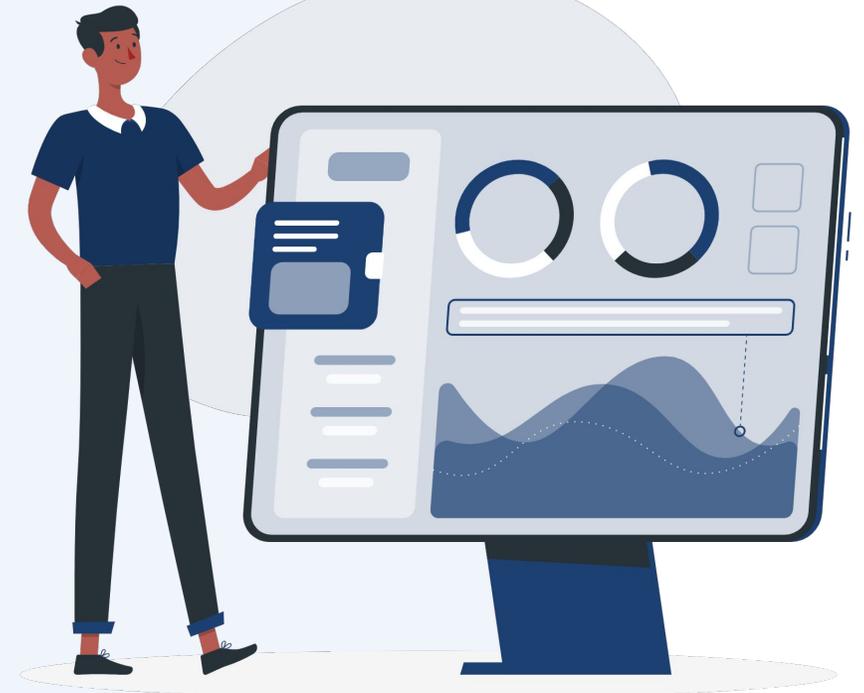
Project Performance Report (PPR)

The Rapid Re-Housing (RRH) PPR will be published in the upcoming weeks.

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

Corrections for the Transitional Housing (TH) PPR draft data will be uploaded into DropBox this week.

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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Data & Performance Management Meeting

Agenda:

- Quarterly Report Review:
 - Project Performance Reports: Emergency Shelter, Street Outreach and Homelessness Prevention
 - Q3 Data Quality Report Cards

Thursday, November 13th @ 1:00 PM - 2 PM

Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

See [OC HMIS Calendar](#) to find monthly HMIS meeting details.



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Training and Resources

HUD Exchange Resources:

- [HMIS Data Standards](#)
- [FY 2026 Interactive HMIS Data Standards Tool](#)
- [HMIS Data Collection Requirements for Transition to FY 2026 HMIS Data Standards](#)

Community Resources:

Helpful Coordinated Entry Resources may be found on the Office of Care Coordination's [OC CES Academy website](#).



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HMIS Privacy Forms

The [OC HMIS Privacy Forms](#) are updated, please review your agency website and update accordingly.

Our HMIS Team recommends that you link to the OC HMIS Privacy Form landing page as it will also reflect the most updated forms.

If you wish to link directly to the form, please ensure that you check the link quarterly that it reflects the most updated form.



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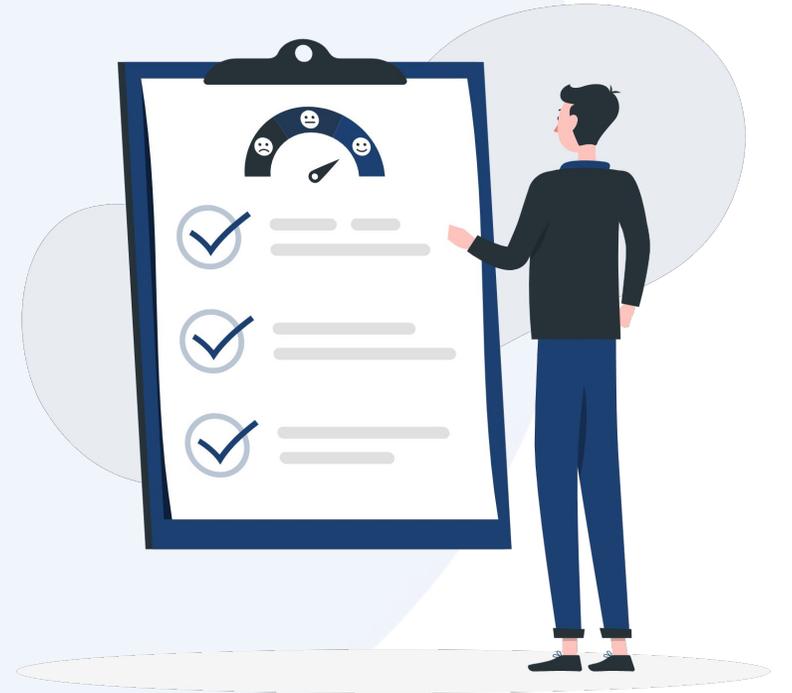
HMIS User Meeting Survey

Our HMIS Team invites users to complete the HMIS User Meeting Survey. The feedback from the survey is used for topics at our monthly user meetings.

We'd greatly appreciate any topics or ideas you're interested in reviewing in the upcoming monthly meetings.

Thank you!

Survey: <https://forms.gle/Gset85stTDjuEPcn9>

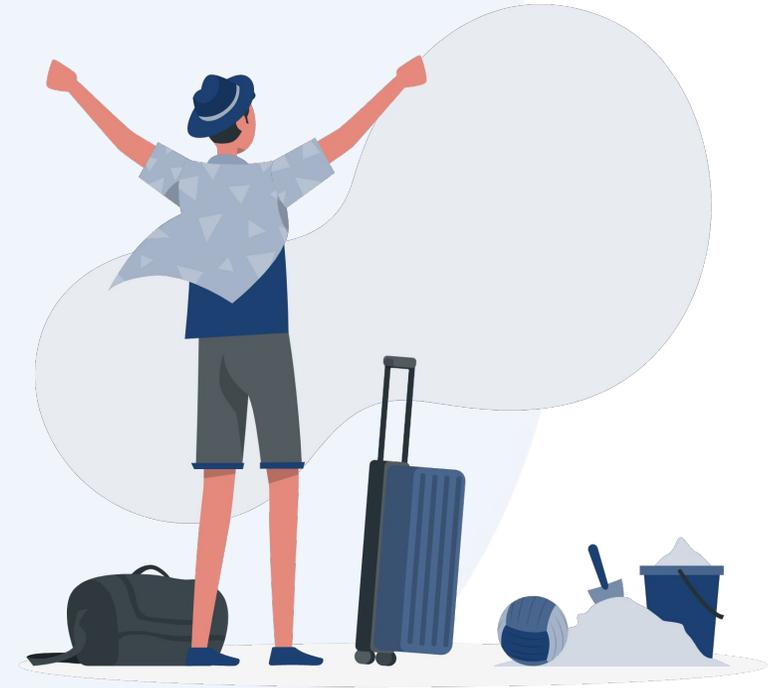


Holidays

The HMIS Team will be out of the office on the upcoming holidays:

Thursday, November 27th & Friday, November 28th in observance of the **Thanksgiving holiday**.

We will be back in office Monday, December 1st, to assist you.



Q&A

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

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



**Thank you
Have a great day!**

Next User Meeting: December 3rd





Orange County
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