

OC HMIS User Meeting Webinar Minutes
12/03/25

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Agenda Items

HMIS Participating Agencies Schedule

HMIS Agency Audit

- Scheduling July - December

PPR Corrections

- Emergency Shelter will be added to your agency’s DropBox this week.
 - If you don’t have a Goal 10 spreadsheet in DropBox, your agency didn’t have any exit data during the reporting period of 11/01/2023 - 10/31/2025
 - Please review the [PPR Webinars](#) for additional information about running and review PPR Goals 1 - 10 for your agency’s programs

[HMIS Participating Agencies Schedule](#)

Deleting Files in HMIS

Files may be uploaded to a client’s HMIS record in error. When discovered, Users should alert their Agency Admins about the erroneous files. Only Agency Admins have the ability to delete erroneous files.

To delete a file, Agency Admins should:

1. Navigate to the client's *profile page*
2. Switch to the client's *files tab*
3. Locate the erroneous file, and then click on the "Delete File" button
4. Click "OK" on the pop-up window that appears

For more information regarding this topic, Agency Admins can reference our [Deleting Files](#) KB article.

LSA and SPM Reminder

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 cover SPM & LSA corrections.

Our HMIS community is now in the 3rd phase, please ensure to keep eye out for our HMIS tickets and follow up calls that require your agency's support with any outstanding corrections and explanation for warning flags.

If HUD TA requests additional information, our HMIS Team will reach out to agencies during Dec 22nd - 31st as needed to request additional support with LSA warning flag explanations.

Our HMIS Team aims to prepare to submit the LSA by Jan 5th.

2026 HIC and Shelter PIT Preparations

The HMIS Team will be sending out files to Agency DropBox folders for review in preparation for the 2026 HIC & PIT. Please address any corrections required.

- For any corrections around funding please submit a [Request to Add Funding to Existing Project Form](#).
- For corrections on bed inventory please submit the [Request to Update Bed Inventory Form](#)
- All corrections are to be submitted by 12/19. The HMIS Team will use the available data to prepare the 2026 HIC forms.

Steps to help before we send out files:

- Run the [Agency Set Up Dashboard](#) to review for accuracy
- Ensure that enrollments and exits are completed
- Submit any [new project set ups](#)
- [Request to close projects](#) that are no longer active

Troubleshooting HMIS Log In

Our team would like to provide some helpful tips on troubleshooting any log in issues with Clarity. A good starting place is to verify you're on the intended website. The differences between the Clarity training and Clarity live sites are rather subtle.

Live Site: The side panel is gray, and there are some login tips provided in that panel.. The live site's url begins with "oc.clarityhs".

Training Site: The side panel is a dark blue and the text mentions that it is a training site. The url for the training site begins with "octrain".

Additional Tips

- For agencies that use Clarity in multiple CoCs (LA County), these sites will look very similar. Please check the url to ensure it contains "OC".
- When resetting your password, please be mindful that the link is only valid for 60 minutes.
- Check the SPAM folder if you can't find the reset email. You may need to check with IT about any SPAM filters.
- Agency Admins can run Agency Active User Report to see if a user account was disabled due to inactivity.
****Please remember that the system automatically disables user accounts after a 60 day period of inactivity****

For more tips please see our [Troubleshooting Logging Into HMIS](#) KB.

Enrollment and Exit Date Review

Agency Administrators and Users can run the [LSA Data Cleanup: Project Descriptor Data Issues Report](#) to review client enrollment start and end dates that may conflict with project operation dates.

The project operating start date should match the earliest enrollment date and when the project is deactivated, the operating end date should match the oldest exit date.

- No client's enrollment start date may be prior to the program's operating start date.
- No client's exit date may be after the program's operating end date (for inactive projects).

If the client's confirmed start or exit date occurs outside of the operating start or exit date for the program, then the user should:

- Review the enrollment dates for accuracy and make corrections if needed; if the dates are correct then...

- Review the operating period of the project and determine if adjustments are needed. If needed, the Agency Administrator can submit a Help Desk ticket to request adjustment to the project operation period.
- Ensure the client is enrolled in the correct project - if the client was enrolled in the wrong project, the Agency Administrator can submit a ticket to request a project move.

Please review the [HMIS Data Standards Manual](#) for additional Enrollment and Exit field guidance.

To locate the LSA Data Cleanup: Project Descriptor Data Issues Report within Clarity, navigate to: Launch pad > Reports > Data Analysis > Built in Reports > click RUN next to the LSA Data Cleanup: Project Descriptor Data Issues Report.

Note that the only filter that needs to be adjusted is the 'Agency Name,' filter. The Report Range is automatically set to the correct LSA reporting period.

The last tile of the report will populate with any clients enrolled in your agency's projects that have project entry or exit dates outside of the operating period.

These errors should be reviewed to determine if the client's enrollment dates are correct, or if the operating period needs to be adjusted.

In cases where the enrollment dates AND operating dates are both correct, staff should make sure the client is enrolled in the correct project - if the client was enrolled in the wrong project, the AA can reach out to the Help Desk to request a program move.

Updates to FY2026 HMIS Data Standards

The VA has now issued a new guidance and [V10 Mental Health Consultation](#) is no longer a required field. OC Clarity has rolled out this update and this is reflected in the system as of the first week of December based off of Bitfocus update timeline.

This data element is optional and is available on the enrollment screen. This data element is only collected for veterans who are enrolled in SSVF programs.

Project Performance Report

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 Emergency Shelter (ES) 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.

Training and Resources

HUD Exchange Resources:

- [2026 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](#).

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/basjHuXVuxd9Xuue9>

Holiday

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

Wednesday, December 24th to Friday, December 26th in observance of the Christmas holiday.

We will be back in office Monday, Dec 28th, to assist you.

For the New Years Holiday, our office will close at 12:00pm on December 31st and we will be out of the office January 1st and January 2nd.

We will be back in office Monday, January 5th, to assist you.

Q&A

General Question

- Q: We have a staff member on leave. How do I ensure they are not deactivated in HMIS?
 - A: If a staff member is on leave for less than 60 days, they will need to log into Clarity on their first day of return to keep their HMIS user account active. If their leave is 60 or more days, the user will need to retake their applicable HMIS training courses. After this, the Agency Admin will submit their skills test via the [HMIS Account Update & Testing Form](#).

*Please see the [New Staff Onboarding KB](#) for specifics on what type of training is required for the user's corresponding access role. Another helpful resource is our [HMIS Account Update & Testing Form KB](#).

Future Meeting Information

January 2026 HMIS User Meeting Webinar

- Date: Wednesday, January 7th, 2026
- 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.