

July 2026 OC HMIS User Meeting

211

Get Connected. Get Help.™



Agenda

1. HMIS Participating Agencies Schedule
2. Clarity Updates - Universal Multi-Factor Authentication
3. Clarity Updates - New Interface Roll Out
4. HMIS Recertification
5. DropBox Clean Up
6. Data Element Highlight: Health Insurance
7. Release of Information and Decision Pathways
8. Report Highlight - Clients with Verbal Consent ROI Records
9. Troubleshooting HMIS Log In
10. HIC and Sheltered PIT Overview
11. Project Performance Report - Goal 11
12. Project Performance Report
13. Training and Resources
14. Survey
15. Holiday
16. Q&A
17. 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												
	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
Orange County Required Reports	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												
	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 @ 10:00AM	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a												

HMIS Participating Agencies Schedule

July

- Project Performance Reports
 - Emergency Shelter Publication
 - draft data added to DropBox
- Agency Audits Begin
- HMIS User Recertifications

August

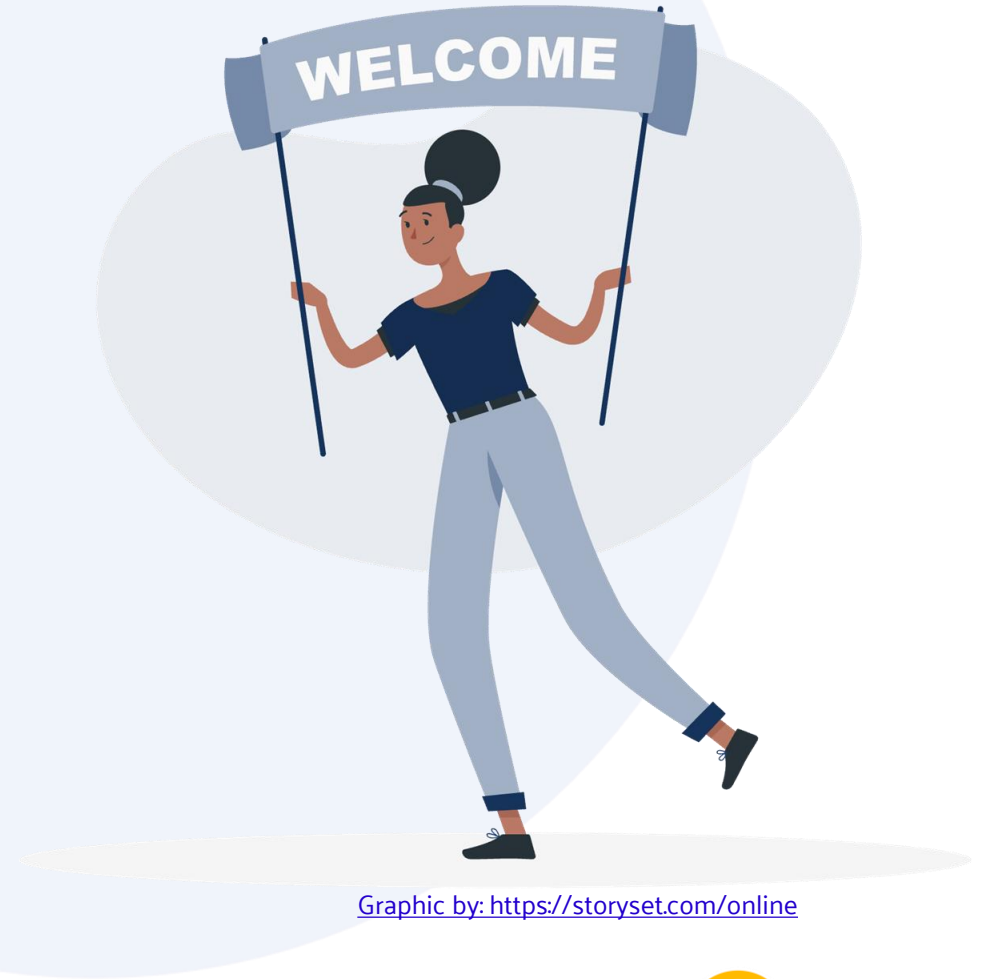
- Project Performance Reports
 - Street Outreach Publication
 - Homelessness Prevention draft data
- Agency Audits
- HMIS User Recertifications

September

- Project Performance Reports
 - Homelessness Prevention Publication
 - PSH-OPH draft data
- Agency Audits

New Staff Update

Please welcome Jocelyn Morales, HMIS Support Specialist
and Liz Valadez, HMIS Data Analyst!



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Clarity Updates - Universal Multi-Factor Authentication (MFA)

Clarity Human Services is moving its authentication foundation to **Auth0 on July 23**. Add the Recovery Email to Allowlist(s): Ask your IT team to allowlist the email address `noreply@bitfocus.com`

- **Enhanced Security:** Robust protection against unauthorized access with industry-leading security protocols.
- **Improved User Experience:** A faster, more modern login interface and a more reliable password recovery process.
- **Single Sign-On (SSO) Support:** Simplified integration for agencies utilizing enterprise identity providers.
- **Multi-Factor Authentication (MFA):** To better protect sensitive HMIS data, MFA will now be a standard requirement. Users will provide a second form of verification (such as a code sent via email or an authenticator app) during login.



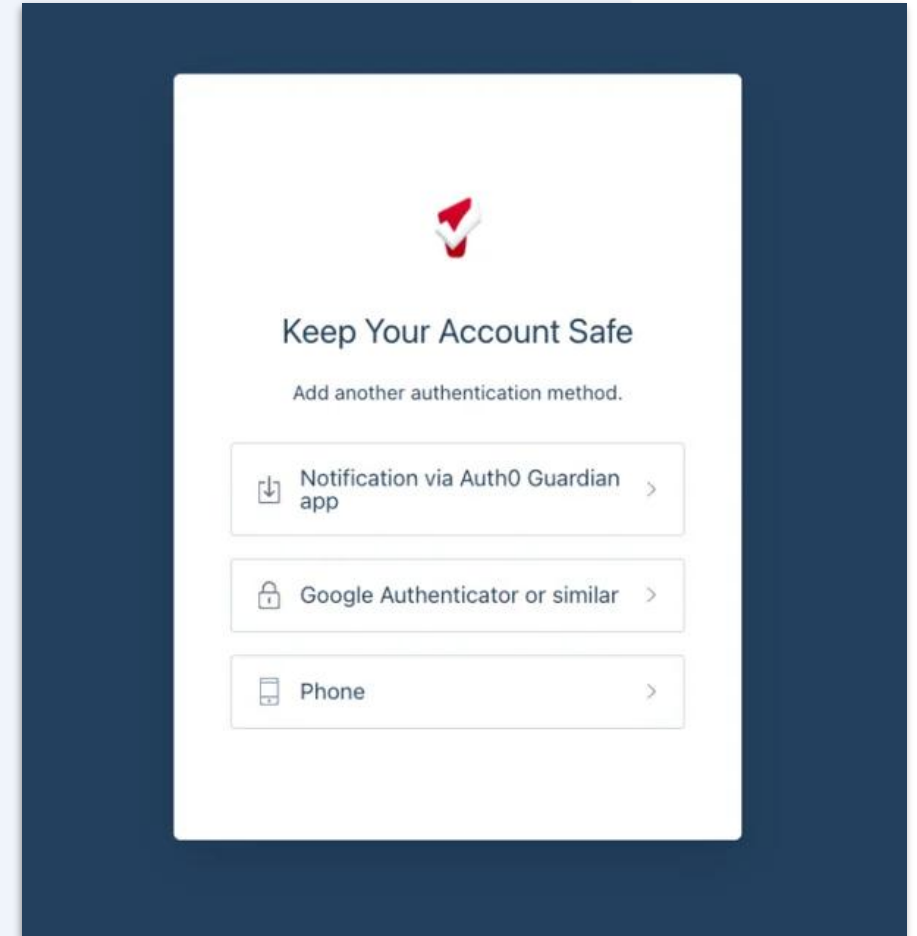
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Clarity Updates - Universal Multi-Factor Authentication (MFA)

Users will first enter your email address and then redirected to Autho screen.

Supported authentication methods at launch include:

- One-time password via authenticator app (Google Authenticator or Microsoft Authenticator for iOS and Android devices are two popular options).
 - Note: If users cannot use their phones to authenticate, they can use a desktop-based authenticator like [Proton](#).
- Push notification via the Autho Guardian app
- Phone (SMS or voice)
- Email
 - Note: Email is only available as a secondary factor. Users must enroll in at least one other authentication method first.



Clarity Updates - Universal Multi-Factor Authentication (MFA)



Users can manage their enrolled factors directly from their Clarity account settings after migration.

- Click the staff member icon in the upper-right corner, then select **Account Settings**
- Click **Security Settings** under Advanced Options on the right side panel
- Users will see options to manage your MFA

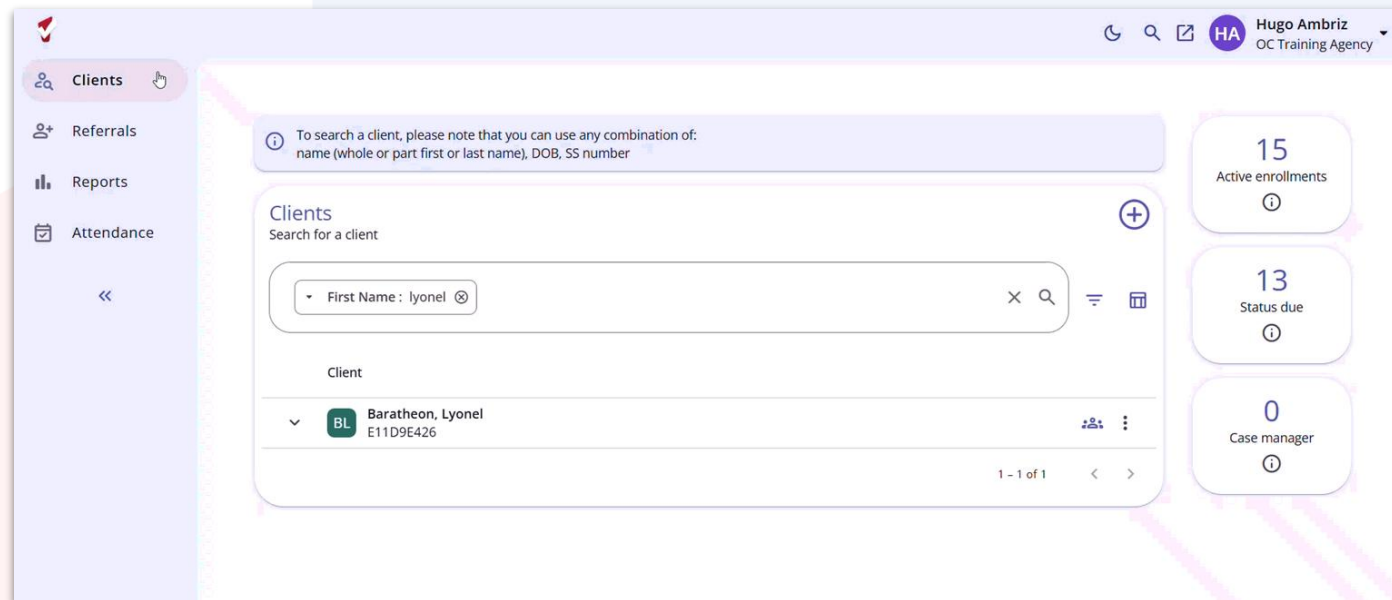
Note: Email can only be used if another authentication method is set up first, and the user does not have access to the phone or authenticator app they set as their primary recovery method. Email cannot be the only/primary authentication method.

Clarity Updates - New Interface Roll Out

Clarity Human Services New Interface will go live Sept 1st.

The new Clarity Human Services interface is designed to be easy to use and pave the way for future enhancements. The new interface includes tools for collecting and managing data for reporting, case management, and coordinated care.

The new interface will be enabled on the Clarity Training Site on July 6th.



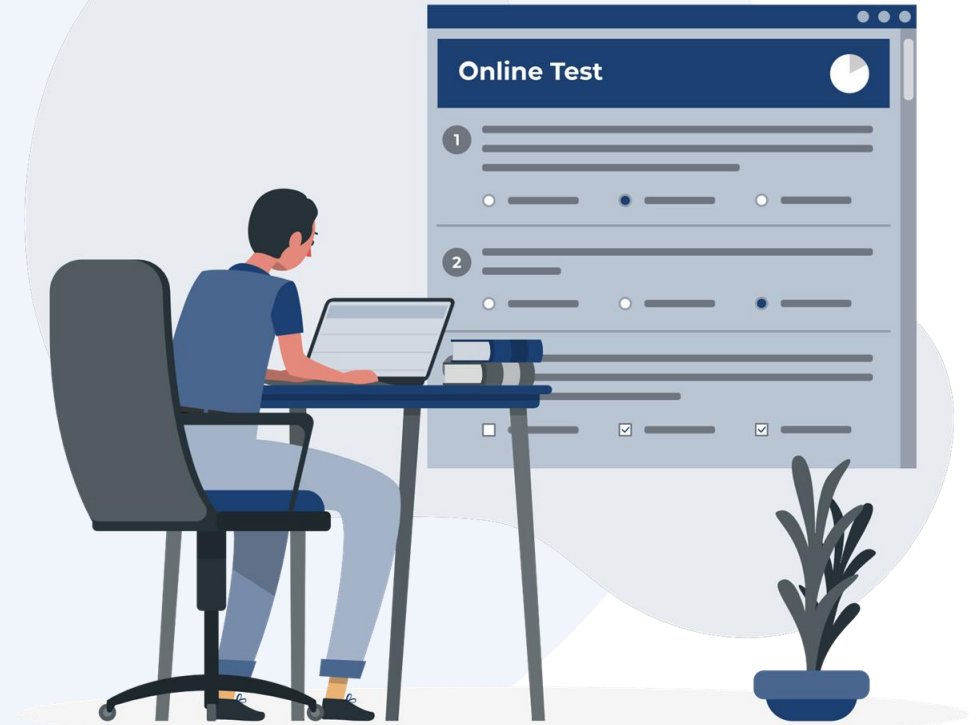
HMIS Recertification

The 2026 HMIS Recertification cycle will begin on **July 6th**.

All users with whose HMIS accounts were created before January 1st, 2026 must complete the [2026 HMIS Recertification Course](#). In addition, users with data entry access must also complete the 2026 HMIS Part 2 Recertification Skills Test.

- Agency Admins must submit the 2026 HMIS Recertification Form for their users by **August 31st** to avoid having their HMIS accounts disabled

To identify which users must complete the recertification, agency admins should run the *Agency Active Users Report* as needed:
Reports > Data Analysis > Orange County Clarity System Reports > Agency Active Users



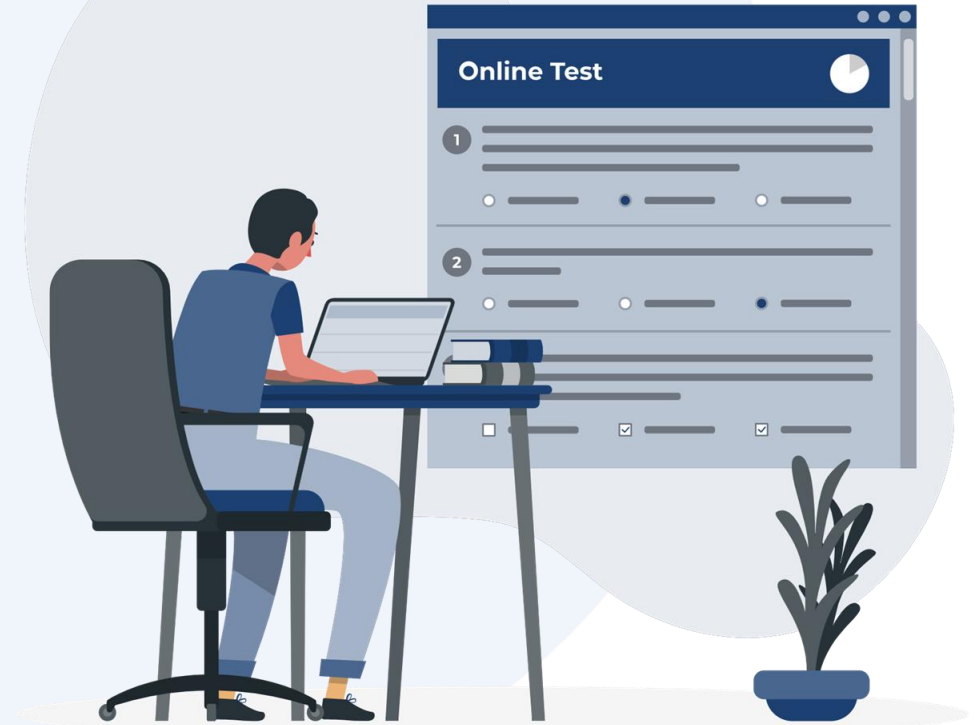
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HMIS Recertification & New Clarity Interface

In preparation for the launch of the new Clarity Human Services interface, the HMIS Help Desk will update the Clarity Training Site for users to complete the 2026 HMIS Recertification Skills Test utilizing the new interface.

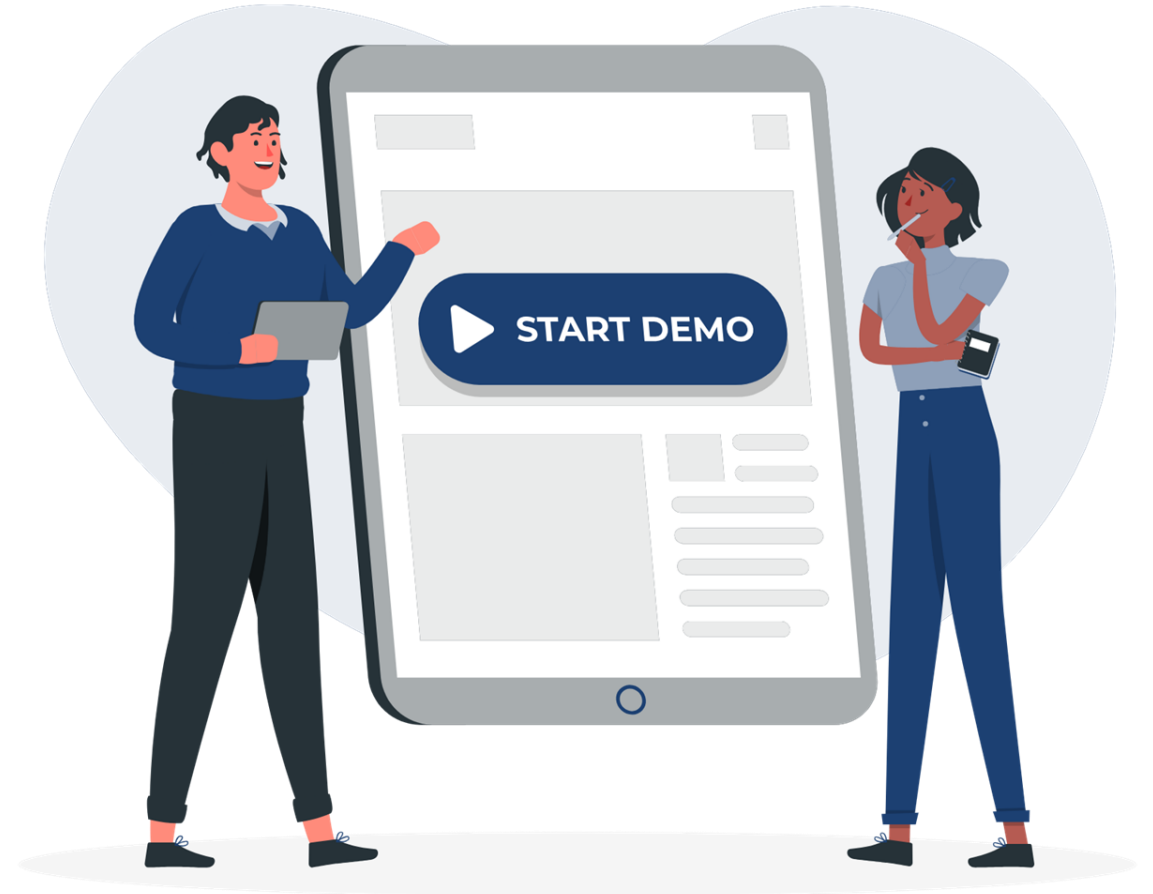
Users will be able to practice creating client profiles, adding releases of information, enrolling and exiting clients from projects, and modifying household composition through the updated workflows.

The HMIS Help Desk encourages users to reach out to their Agency Administrators for additional help navigating the new interface.



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

HMIS Recertification & New Clarity HMIS Interface – DEMO



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DropBox Clean Up - July 2026

- Please review your Agency's DropBox folder and download any files you will need for your records by ***Friday, July 10th.***
- The HMIS Helpdesk will be removing all DropBox files on Wednesday, July 15th.
- Thank you for your cooperation!



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Data Element Highlight: Health Insurance

4.04 Health Insurance

Data Collected About: All Clients

Project Type: All HMIS Project Types

Collection Point: Project Start, Update, Annual Assessment, and Project Exit

Health Insurance is collected to determine whether clients are accessing all mainstream health insurance benefits for which they may be eligible along with changes between project start and exit.

For more information please refer to the following knowledge base article, [Health Insurance](#) and [guidance](#) from HUD.



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

Data Element Highlight: Health Insurance Cont.

HMIS Users are recommended to read through the full Health Insurance options and explain each one so the client has the opportunity to provide accurate data on their health insurance.

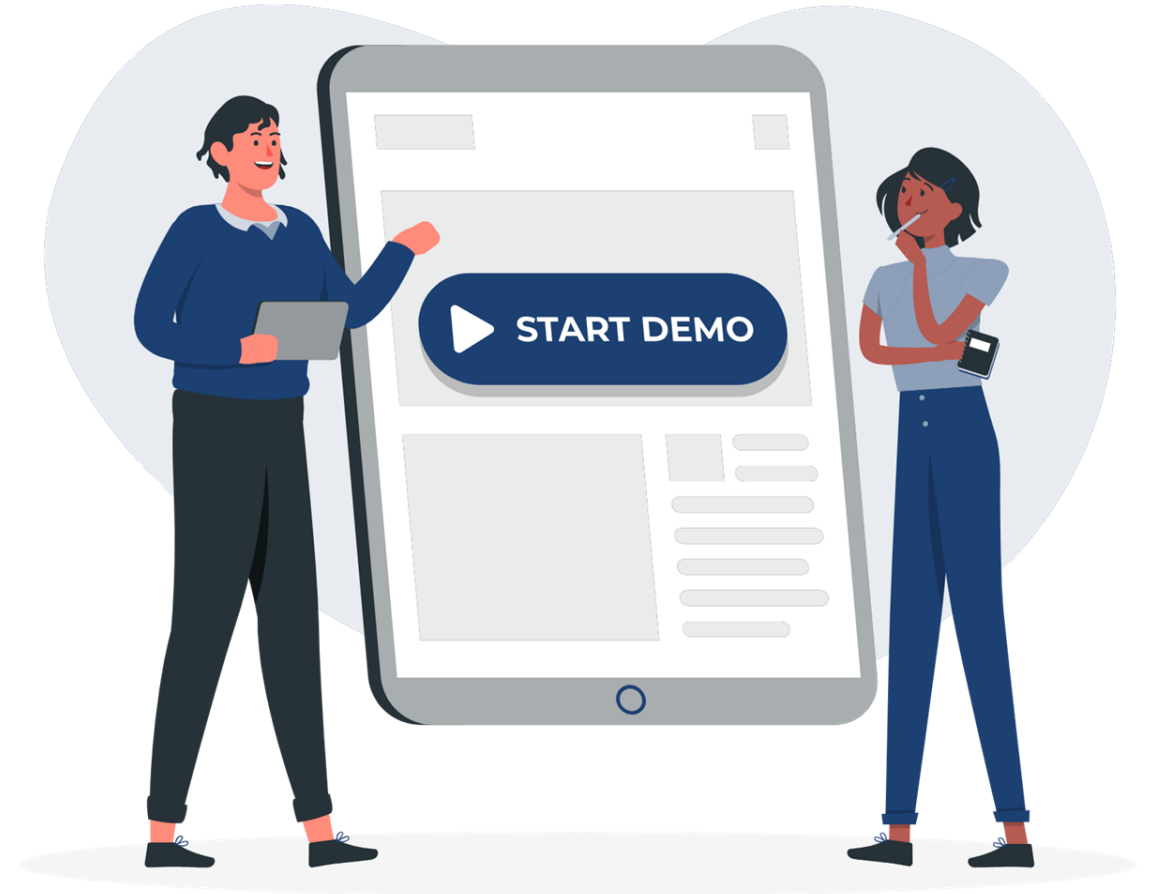
Covered by Health Insurance	Client has a policy that helps pay for medical expenses, reducing out-of-pocket costs for healthcare services.
Medicaid	Medicaid is a partnership between federal and state funds. It should always be listed as Medicaid, not State Health Insurance.
Medicare	Health insurance program primarily for people aged 65 and older, as well as certain younger individuals with disabilities or specific medical conditions.
State Children's Health Insurance Program	A program that provides low-cost health coverage to children in families with incomes too high to qualify for Medicaid but too low to afford private insurance. In some states, CHIP also covers pregnant women.
Veteran's Health Administration (VHA)	A healthcare program provided by the U.S. Department of Veterans Affairs (VA) for eligible military veterans.
Employer-Provided Health Insurance	Health coverage offered to employees and their dependents as part of their benefits package, where the employer often shares the cost of premiums. Includes TRICARE available to Veterans based on military service.

Data Element Highlight: Health Insurance Cont.

Health Insurance obtained through COBRA	Continued group health insurance coverage for a limited time after a qualifying event.
Private Pay Health Insurance	Health coverage solely paid for by the client, not through an employer or other source like Medicaid or Medicare.
State Health Insurance for Adults	State-funded subsidy programs for medical coverage. Eligibility and availability for these programs varies by state.
Indian Health Services Program	Medical and health services to members of federally recognized Native American Tribes and Alaska Native people.
Other	A health insurance other than the ones identified in this list.
If “No” for each of the health insurance sources Reason (HOPWA ONLY)	HOPWA recipients must provide an explanation for why a “No” response was provided to any of the fields.

Clients that receive General Relief (GR) or Supplemental Security Income (SSI) typically receive Medicaid (Medi-Cal aka CalOptima). Medicaid is a partnership between federal and state funds. It should always be listed as **Medicaid**, *not State Health Insurance*.

Data Element Highlight: Health Insurance



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

Release of Information and Decision Pathways

As part of the client intake process, users are required to ask clients if they consent to share their information in OC HMIS. In the *client privacy screen*, users are able to document whether or not a client provided consent.

Client consent is not needed to ask for the information or enter it into the HMIS. Client consent is needed for data sharing.

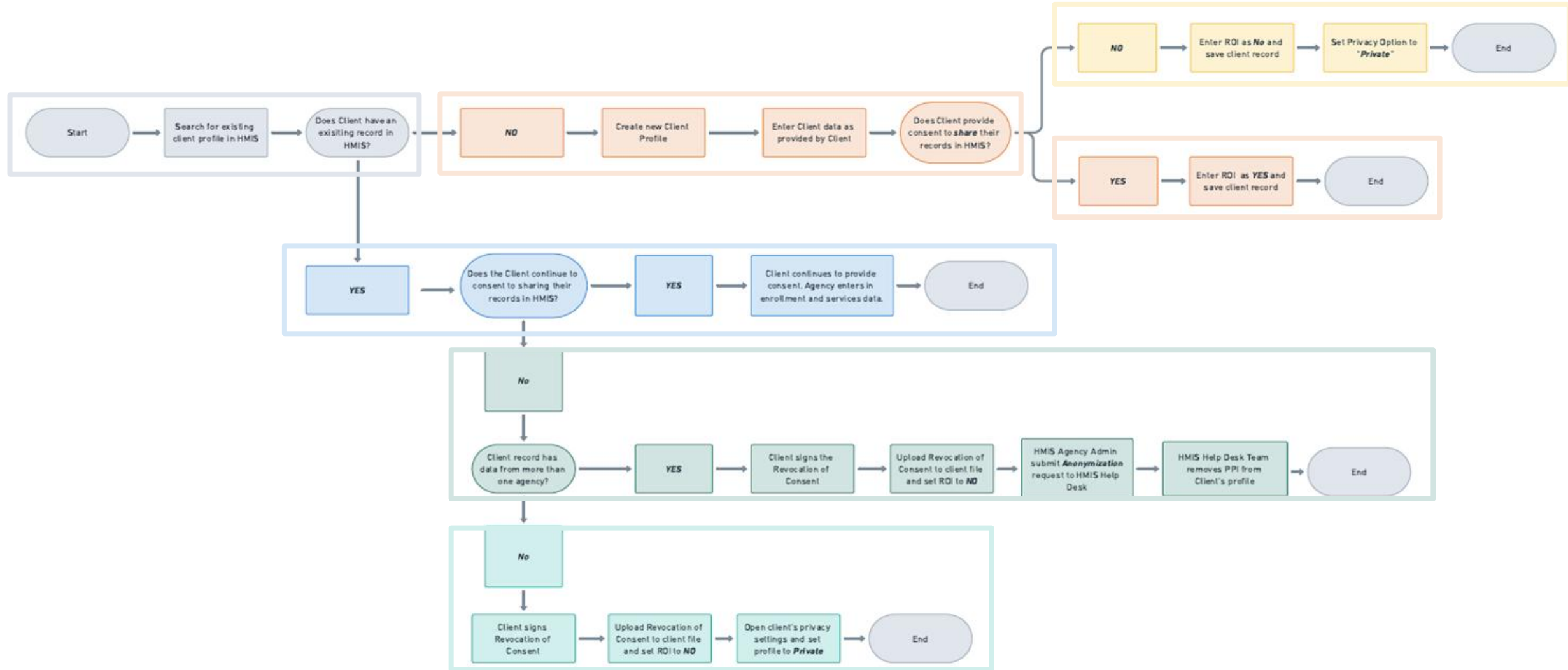
Clients who provide consent should have their client profiles set to **public**, while clients who do not provide consent should have their client profiles set to **private**. Unaccompanied minor clients cannot provide consent to share their information and must have private client profiles created.

If a client provides consent to share their information, users must document how that consent was obtained via a *Release of Information* (ROI). The following forms of documentation are available :

- **Electronic Signature** - Client digitally signs form in Clarity HMIS
- **Attached PDF** - Uploaded document containing the client's wet signature
- **Verbal Consent** - A temporary form of consent to be updated later on
- **Household** - For minor clients whose Head of Household provided consent

For more information about this topic, please reference our [Accessing and Completing Release of Information \(ROI\)](#) KB article and our [Client Record Sharing Decision Pathways](#) document.

HMIS Client's Record Sharing Decision Pathways



Clients with Verbal Consent ROI Records

Verbal Consent may be used temporarily when a signed Consent to Share Protected Personal Information form cannot be obtained at enrollment or service delivery. It is not a permanent replacement for a signed consent form.

When Verbal Consent is selected as the ROI Documentation Type, agencies must obtain the client's signed consent as soon as possible and update the ROI record in HMIS.

Regularly review the Clients with Verbal Consent ROI Records report to identify clients who still need signed consent. Verbal consent should only be used when no other method of obtaining consent is available.

For more tips please see our [Verbal Consent Guidance HMIS KB](#).

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	06/25/2026	
End Date	06/25/2033	
Documentation	Select	▼
	Select Electronic Signature Attached PDF Verbal Consent Household	

SAVE C

Managed with Clarity Human Services

Clients with Verbal Consent ROI Records

To see which clients must be contacted to complete a Consent To Share Protected Personal Information form (electronically in HMIS or on the paper form):

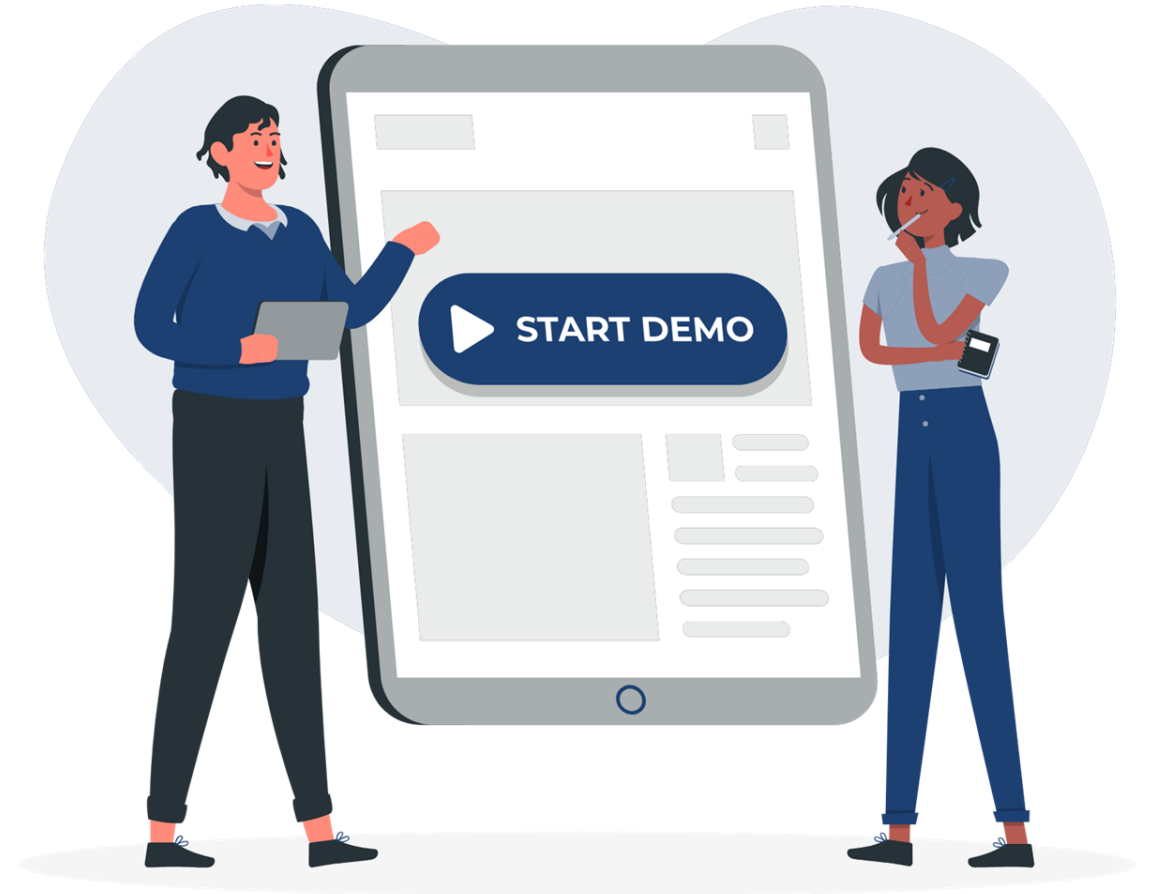
1. Click the menu button
2. Click "Reports"
3. Click "Data Analysis"
4. Click "Orange County Clarity System Reports"
5. Click "Run" next to "Clients with Verbal Consent ROI Records"
6. Click "Filters"
7. Enter your agency's name
8. Click "Run"

You can click the number that appears in the client's "Personal ID" column to see a link to the client's Profile in Clarity.

The screenshot shows the 'OC Training Agency' interface. At the top, there's a navigation bar with 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. Below this, a 'DATA ANALYSIS' section is visible. A menu overlay is open, displaying icons for 'SETUP', 'MANAGE', 'REPORTS', 'CALENDAR', 'ATTENDANCE', 'MERGE', 'DATA IMPORT', 'OUTREACH', and 'INVENTORY'. The main content area shows a list of reports under the heading 'Built In Reports'. The first report is 'Orange County Training System Reports', which has a '12 rep' indicator. Below it is 'AFH - Homekey Services Summary' with a '43 rep' indicator. The list continues with 'City Net Street Outreach', 'Front End User Dashboard', 'Training Site Verbal Consent Test', and 'Training Site Verbal Consent Test - Agency Filter'. Each report has a 'RUN' button next to it.

Report Name	Rep Count	Action
Orange County Training System Reports	12 rep	
AFH - Homekey Services Summary	43 rep	RUN
City Net Street Outreach		RUN
Front End User Dashboard		RUN
Training Site Verbal Consent Test		RUN
Training Site Verbal Consent Test - Agency Filter		RUN

Report Highlight - Clients with Verbal Consent ROI Records Demo



Troubleshooting HMIS Login

oc.clarityhs.com/login

Live Site

Gray

If you are experiencing problems logging in, please refer to the Troubleshooting Logging into HMIS knowledge base article. If you continue to experience issues, contact your Agency Administrator.

When logging into Clarity, please carefully enter your user name and password so all characters are entered correctly. User accounts will be automatically locked if an incorrect password is entered 4 times.

**Provides
Log In
Tips**

octrain.clarityhs.com/login

Training
Site

**Dark
Blue**

Please note that this is a training database, and only fictitious information should be entered.

**Mentions
Training**

Troubleshooting HMIS Login Cont.

Additional Tips

- For agencies that use Clarity in multiple CoCs (LA County), these site will look very similar. Please check the url to ensure it contains “OC”.
- When resetting your password, the link is only valid for 60 minutes.
- Check SPAM folder if you can’t find the reset email. 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](#).

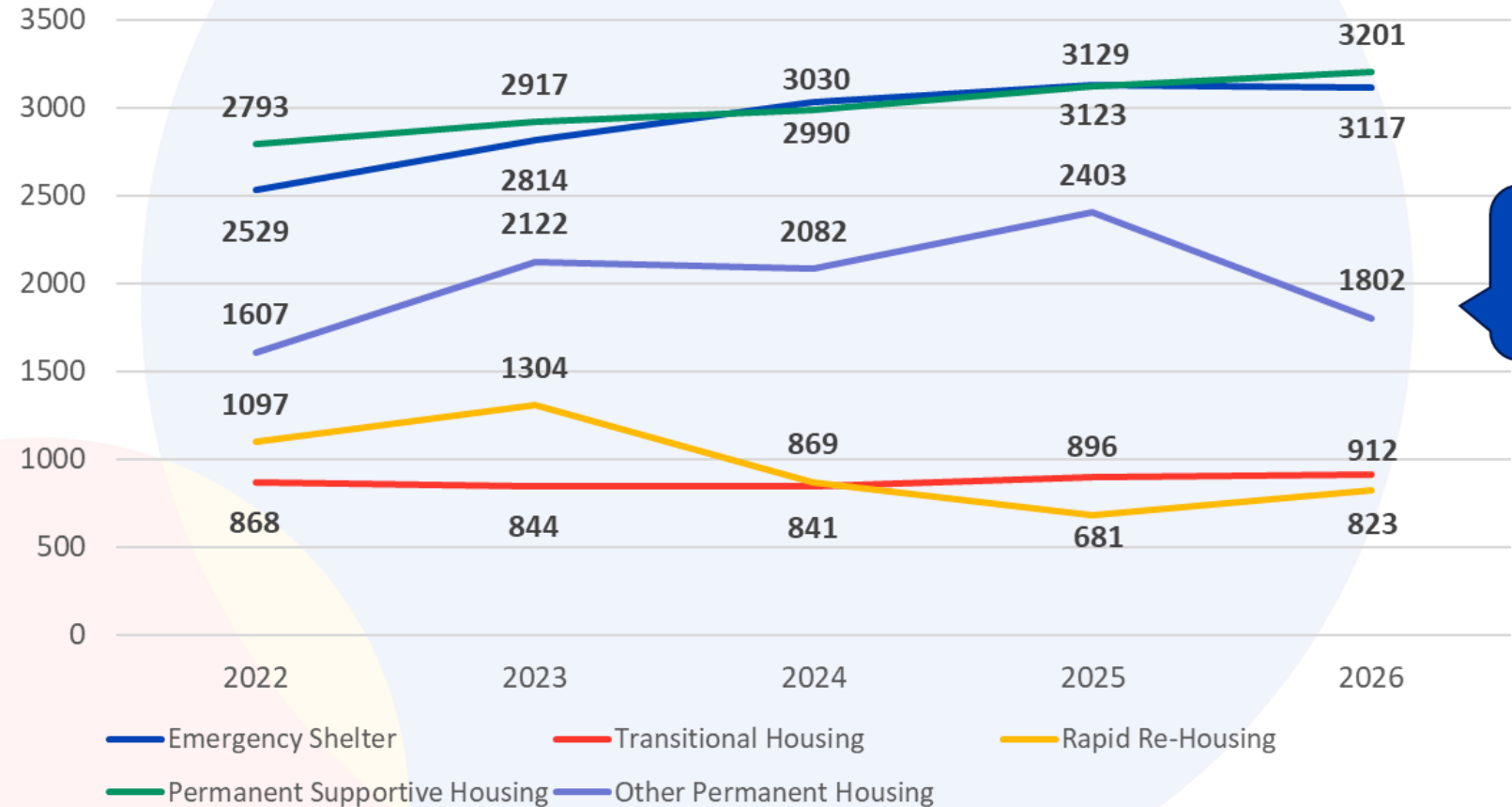
2026 Housing Inventory Count (HIC)

• 9,855 year-round & seasonal beds (-377)

• Rapid Re-Housing beds have increased to **823** (+142)

• Other Permanent Housing beds have decreased to **1,802** (-601)

[HIC Overview](#)
[PIT Overview](#)
[2026 PIT Summary](#)



Half of these beds are EHV

PPR Goal 11 - Receive Referrals from the Coordinated Entry System

Goal 11 is focused on receiving referrals from the Coordinated Entry System. This means that **100%** of Permanent Housing Projects should be receiving referrals from the Coordinated Entry System, to ensure that the **highest priority clients are receiving the housing resources they need to end their homelessness.**

Universe: Head of Households with a Project Start Date during the reporting period.

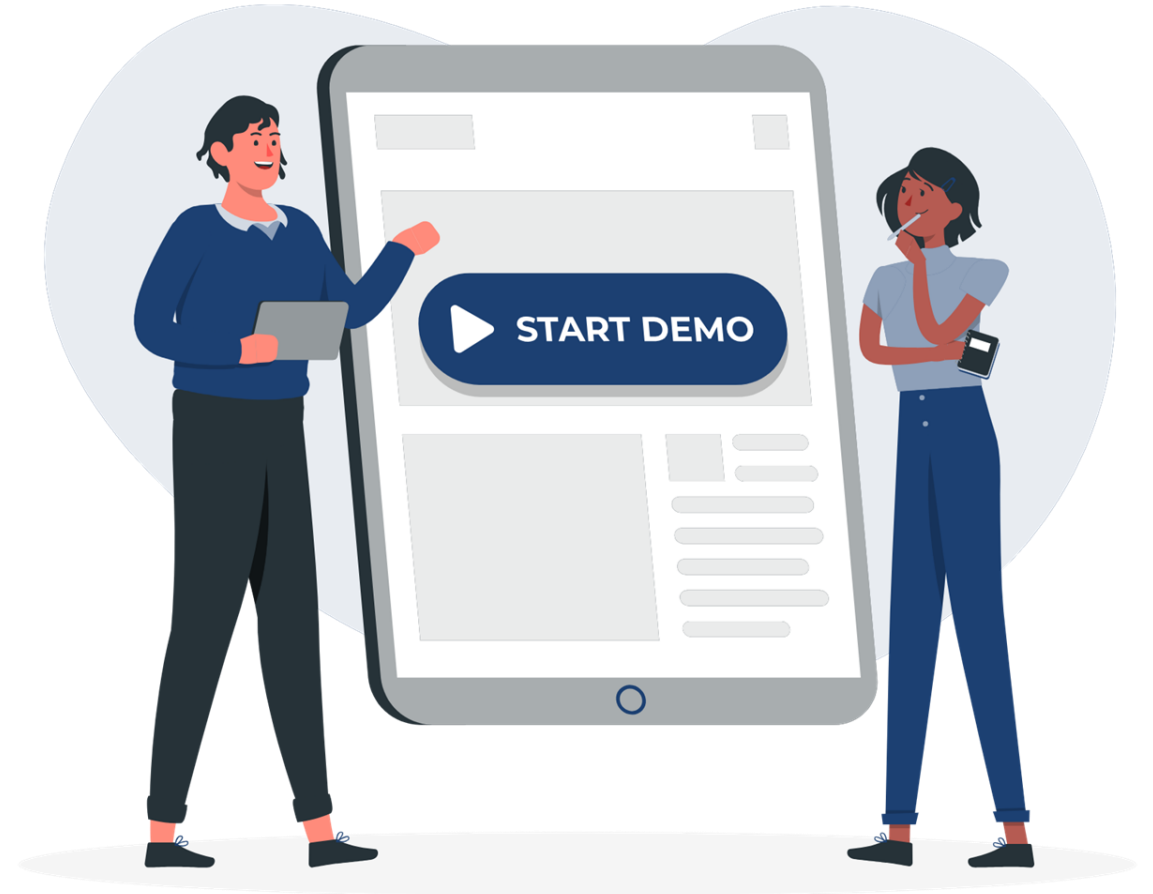
Measure is compares the **number of new enrollments** in the housing project during the reporting period to the **number of completed referrals** the housing project had during the reporting period.

$$\text{Goal 11} = \frac{\text{Completed Referrals}}{\text{Number of New Enrollments}}$$

Clients entering from the following rental subsidy types should be excluded from the measure.

- Permanent Supportive Housing
- RRH or equivalent subsidy
- Other permanent housing dedicated for formerly homeless persons

PPR Goal 11 - Demo



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

Project Performance Report (PPR)

The Emergency Shelter (ES) PPRs will be published on our website 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 Street Outreach (SO) 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.



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

Training and Resources

HMIS Data Quality Training:

The OC HMIS Team will be hosting a *Clarity New Interface Training* webinar on:

Wednesday, July 8th @2:00PM

[Click here](#) to join!

Meeting ID: 865 0356 6192

Registration is not required

Please review the [OC HMIS Calendar](#) to find upcoming HMIS meeting and training details.



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HMIS User Meeting Survey

The HMIS Team invites users to complete our HMIS User Meeting Survey. The feedback from the survey is used to select 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/JRrEHw6jpLFBtVFXA>



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Holiday

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

Friday, July 3rd in observance of July 4th.

We will be back in the office **Monday, July 6th** to assist you.



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

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: August 5th





Orange County
UNITED WAY