

OC HMIS User Meeting Webinar Minutes 07/01/26

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Agenda Items

HMIS Participating Agencies Schedule

PPR Corrections

- Street Outreach Goal 10 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 06/01/2024 - 5/31/2026
 - 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](#)

Clarity Updates - Universal Multi-Factor Authentication

Clarity Human Services is moving its authentication foundation to **Autho 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.

Users will first enter your email address and then redirected to Auth0 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 Auth0 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.

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.

Please review the following knowledge base article for more information, [Logging In To Clarity For The First Time](#)

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 by navigating to:

Reports > Data Analysis > Orange County Clarity System Reports > Agency Active Users

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.

DropBox Clean Up

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 kindly for your cooperation!

Data Element Highlight: 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.

Please note that the Health Insurance field is intended to identify actual health insurance sources. Charity Care or other medical-related funding received by a medical provider or hospital to cover healthcare costs does not constitute health insurance coverage and should not be recorded in HMIS.

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.

Medicare is mostly for those 65 and up, but younger people may also qualify based on disability/medical conditions. Medicaid is a combination of state and federal funds. This is also known as Medi-Cal and should not be listed as "State Health Insurance".

HOPWA recipients are asked to provide an explanation for why a "No" response was selected to any of the insurance options. Typically clients who receive SSI (Social Security Income) or GR (General Relief) also receive Medicaid (aka Medi-Cal).

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

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.

Report Highlight - 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](#).

Troubleshooting HMIS Log In

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](#).

HIC and Sheltered PIT Overview

The [2026 HIC](#) and [Sheltered PIT](#) are published. Please also review the [2026 PIT Summary](#) for additional information.

Project Performance Report - Goal 11

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 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.

Goal 11 = *Completed Referrals/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

You can find this report under the Launchpad > Reports > Data Analysis > Orange County Clarity System Reports > Project Performance Report > PSH/OPH Project Performance Report

Project Performance Report

The Transitional Housing (TH) 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 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

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

Wednesday, July 8th @2:00PM

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

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>

Q&A

Data Element Highlight: Health Insurance

- Q: For Adults that receive Medi-Cal should we record this as State Health insurance for Adults?
 - A: Medi-Cal is California's version of Medicaid which is a partnership between federal and state funds. Please record Medi-Cal as Medicaid, not State Health Insurance.

Clarity Updates - New Interface Roll Out

- Q: When will the new Clarity Interface be available on the live site?
 - A: The new interface will be available for use in the live site on September 1st and the current interface will officially sunset on October 1st. Users may begin testing out the New Interface features within the [Clarity Training Site](#) as of July 6th.

Future Meeting Information

August 2026 HMIS User Meeting Webinar

- Date: Wednesday, August 5th, 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.